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OCC Guides for Administrators

- Navigating the OCC Administration Frontend
- Users
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- Web Designer
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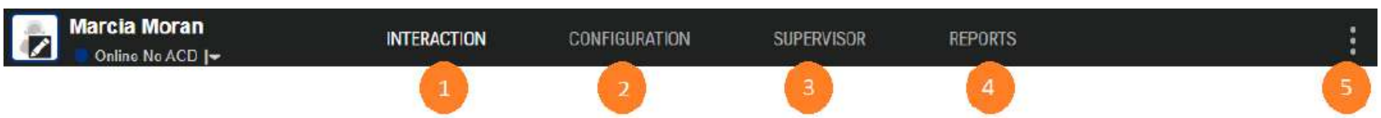
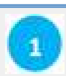
- OCC Process Flow
- Administration of the Outbound Engine
- Skill Dialer
- What is the role of an OCC administrator?
- What is advanced OCC administration?
- Campaigns

Navigating the OCC Administration Frontend

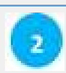
The OCC administration frontend is subdivided into different sections in order to allow access to the various functions in an ordered and intuitive way





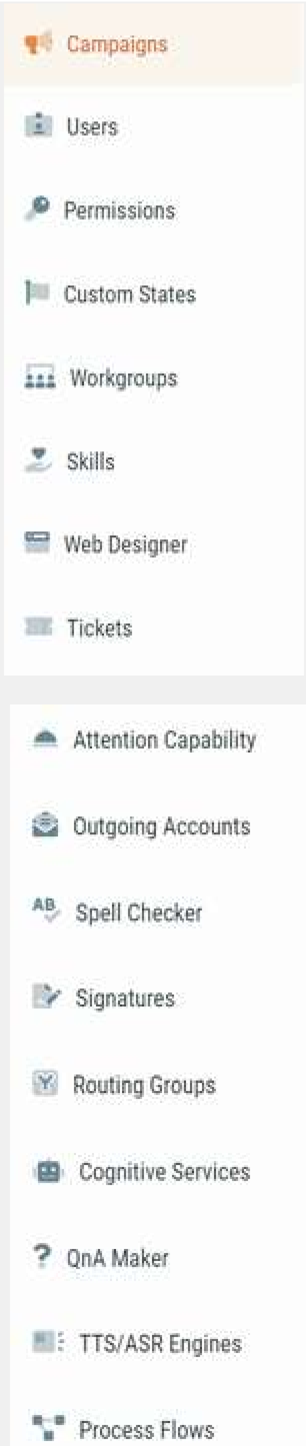
Interaction

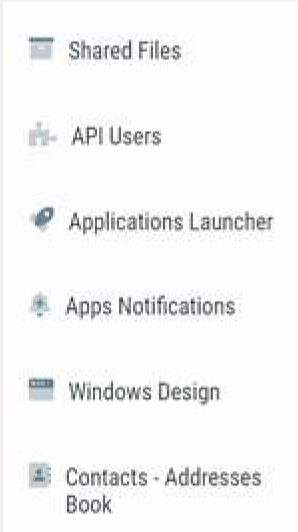
This module will allow you to provide omnichannel service to your clients in a clear and orderly way. To learn more about this module, read: "Navigating the Attention Interface".



Configuration

From this module, you will be able to carry out in a standard way all the configurations relating to:


Campaigns
Users
Permissions
Custom States
Workgroups
Skills
Web Designer
Tickets
Attention Capability
Outgoing Accounts
Spell Checker
Signatures
Routing Groups
Cognitive Services
QnA Maker
TTS/ASR Engines
Process Flows



Likewise, you will be able to access the Reports Designer in order to make custom reports and the Outbound Engine configuration.

Supervisor

This module will allow you to:

- View all the conversations from multiple communication channels.
- Make modifications to the session and the status of the users.
- Execute actions on conversations.

To learn more about this module, read: “Navigating the Supervision Frontend”

Reports

Through this module, you will have access to pre-designed reports that detail, among other things:

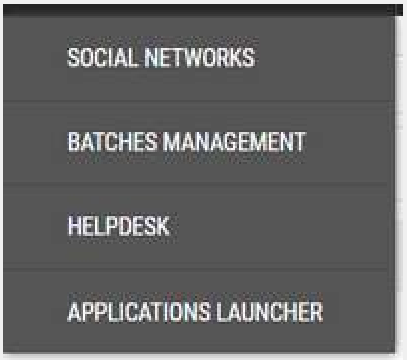
- Attention level
- Productivity
- Performance

Of the different channels, campaigns and agents grouped by category, and you can export them in various formats.

Read "How to access the Reports" to learn more about this module.


Other options

Through this module, you will have access to the rest of the options according to the workspaces



Users

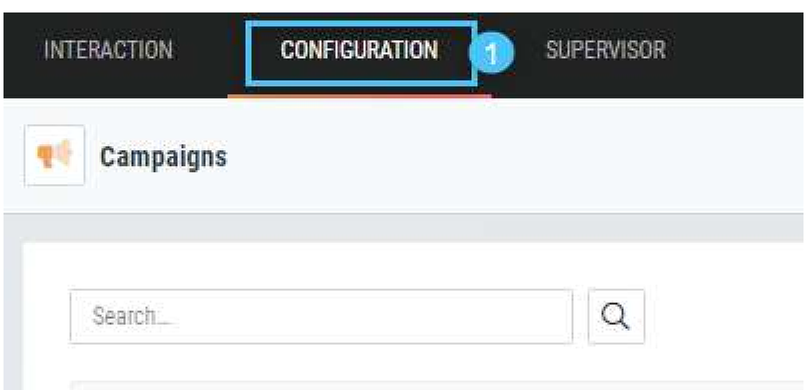
- User search
- How to associate a group with a user
- How to associate skills with a user
- How to create a user
- How to deactivate/activate a user
- How to edit a user
- How to overwrite permissions for a particular user
- How to set a default campaign for a user
- Mass import of users-Administrators

User search

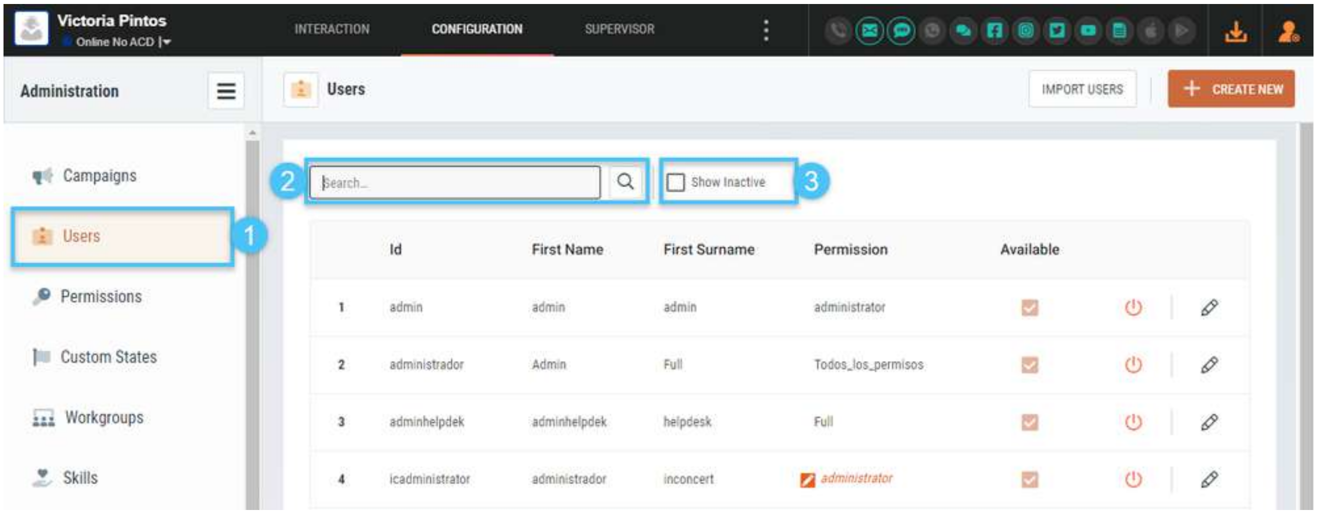
Sometimes it is necessary to quickly locate a particular user, either to edit, deactivate, activate this user or simply to view associated settings. Whatever the case, you can search for a user quickly and easily in just a few steps.

To search for a user:

1. Go to "Configuration" tab:



2. Click on "Users" section  :



User search can be done by: ID, FIRST NAME, FIRST SURNAME or PERMISSIONS. Simply enter a search string for one of the above fields 2 and click the "search" button .

You can also check the "Show Inactive" box 3 , so that the search is carried out among both active and inactive users. If this box is not checked, the search will be carried out only among active users.

Related Articles

- User search
- How to set up Messenger messaging
- How to associate a YouTube account
- How to associate an application from Google Play Store
- How to associate an application from the App Store

How to associate a group with a user

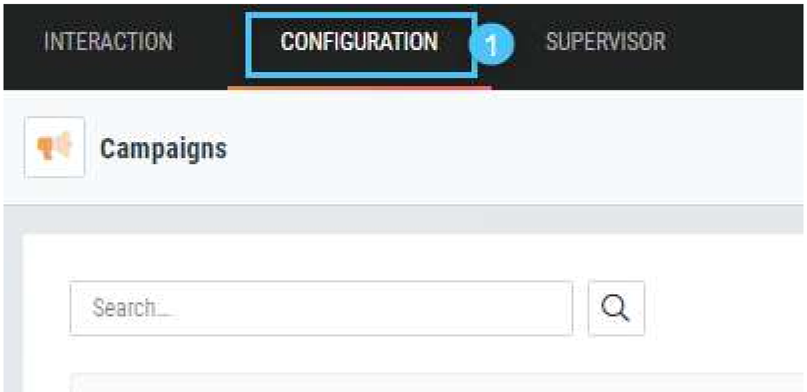
You can group users who have agent permissions in a way that suits you, depending on features they have in common. Basically, the idea of grouping them comes from the need to be able to associate them with a particular supervisor who is to monitor these agents.

You can easily do this either when creating them or by editing them once created. For information on how to create a group, see "How to create a group".

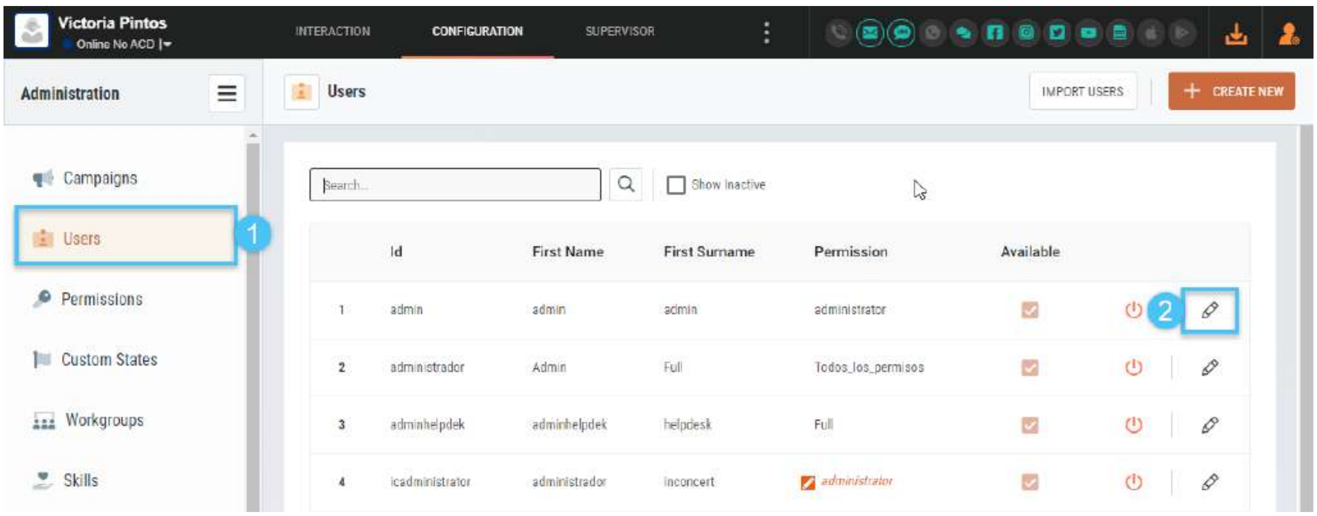
For information on how to associate groups with a user who has supervisor permissions to monitor them, see "How to associate groups with a user".

To associate a group with a user:

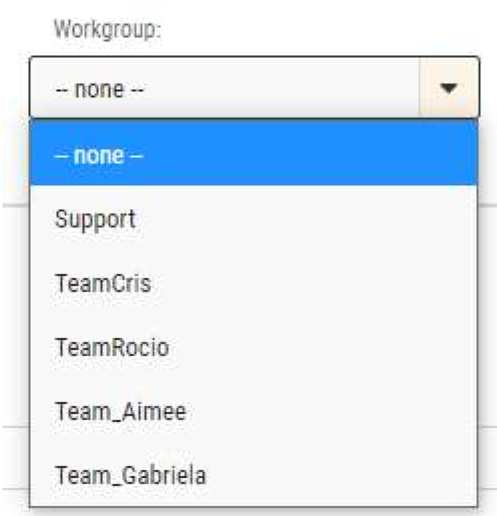
1. Go to the "Configuration" tab:



2. Click on the "Users" section 1 and then click the "Edit" button for the desired user 2 :



3. Go to "Workgroup Belonging" and select the group to be associated from the drop-down list:



Users in an agent role can only belong to one group.

4. After associating the group, click the "EDIT" button to save the changes.

5. To cancel the operation without saving any changes, click the "CANCEL" button.

Related Articles

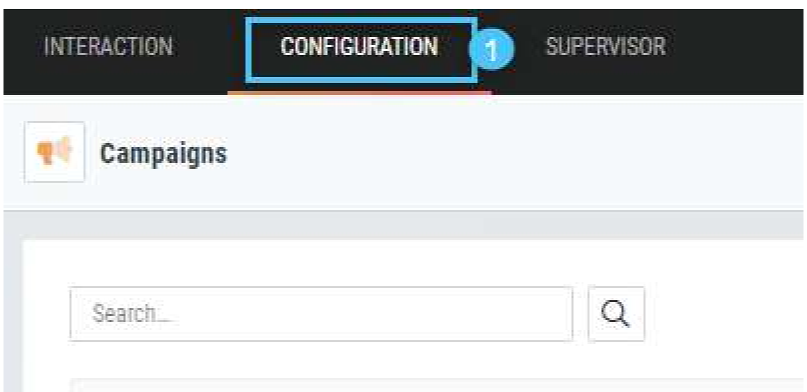
- User search
- How to set up Messenger messaging
- How to associate a YouTube account
- How to associate an application from Google Play Store
- How to associate an application from the App Store

How to associate skills with a user

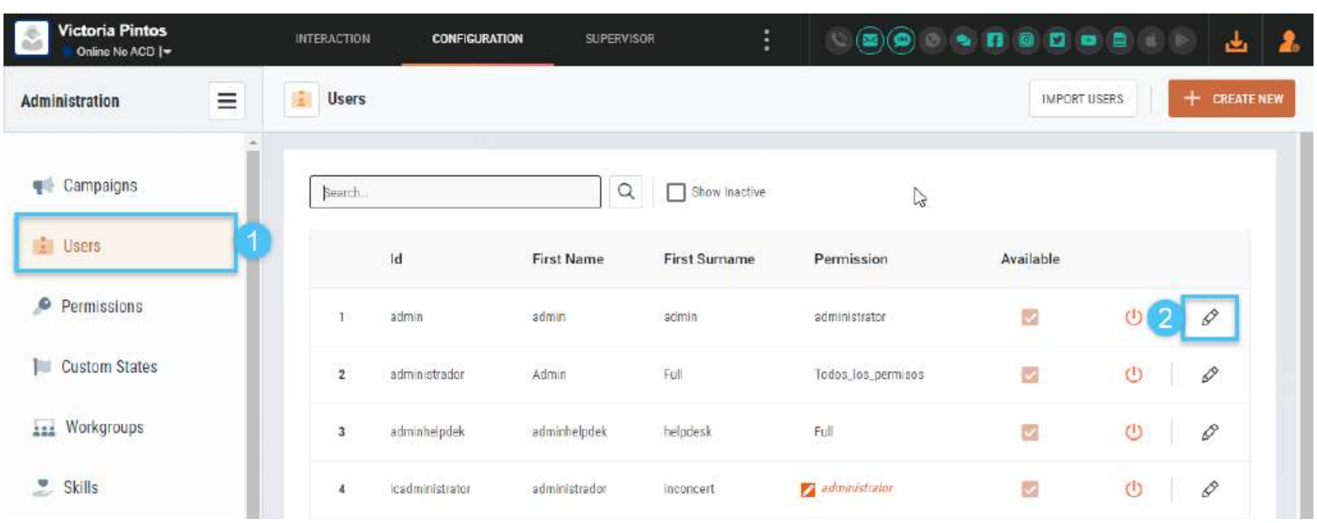
It is important to know which skills agents have, you can then create them in the system and later associate them with each of the agents. These skills, should there be a skill-based distribution of interactions, will allow agents with the highest level of the associated skills to be those who handle the greatest number of interactions. For information on how to define a skill in the system, see "How to define skills".

To associate skills with a user:

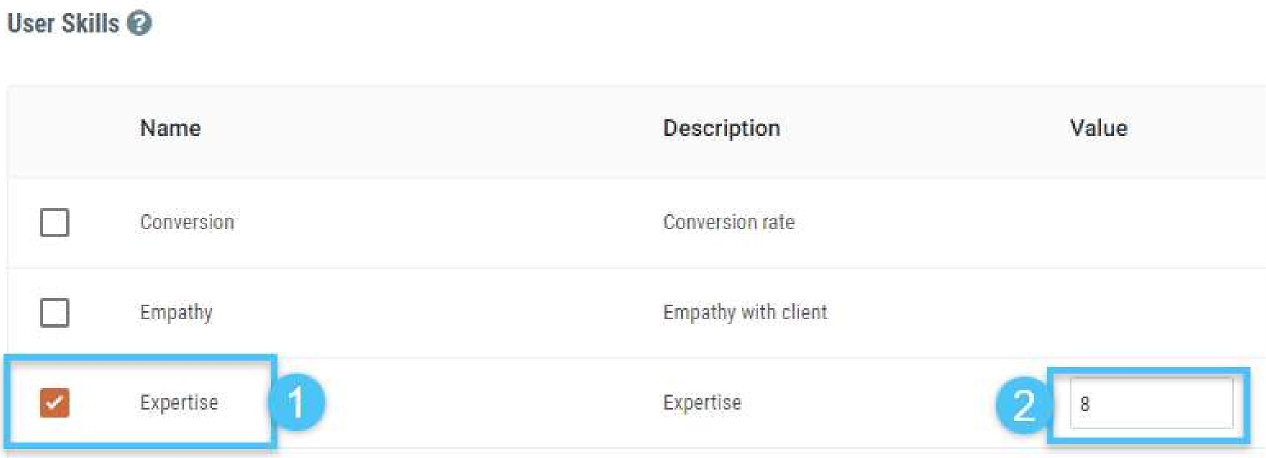
1. Go to the "Configuration" tab:

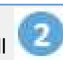


2. Click on the "Users" section  y and then click the "Edit" button for the desired user  :



3. Go to "User Skills" and check the box for the relevant skill  :



On checking the box for the relevant skill, you must indicate the agent's level for that skill  . By default, the value displayed will be the one set for the skill when it was defined. For information on how to define a skill, see "How to define a new skill".

The default value must be between 1 and 10; the higher the value, the higher the level of skill.

4. After associating the skill(s), click the "EDIT" button to save the changes for the user.
5. To cancel the operation without saving any changes, click the "CANCEL" button.

Related Articles

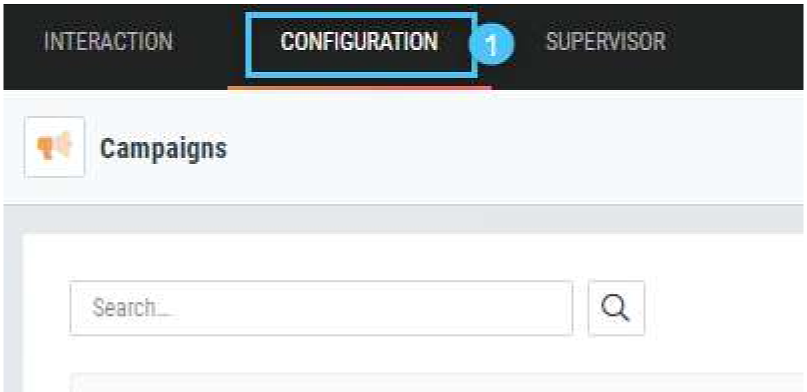
- User search
- How to set up Messenger messaging
- How to associate a YouTube account
- How to associate an application from Google Play Store
- How to associate an application from the App Store

How to create a user

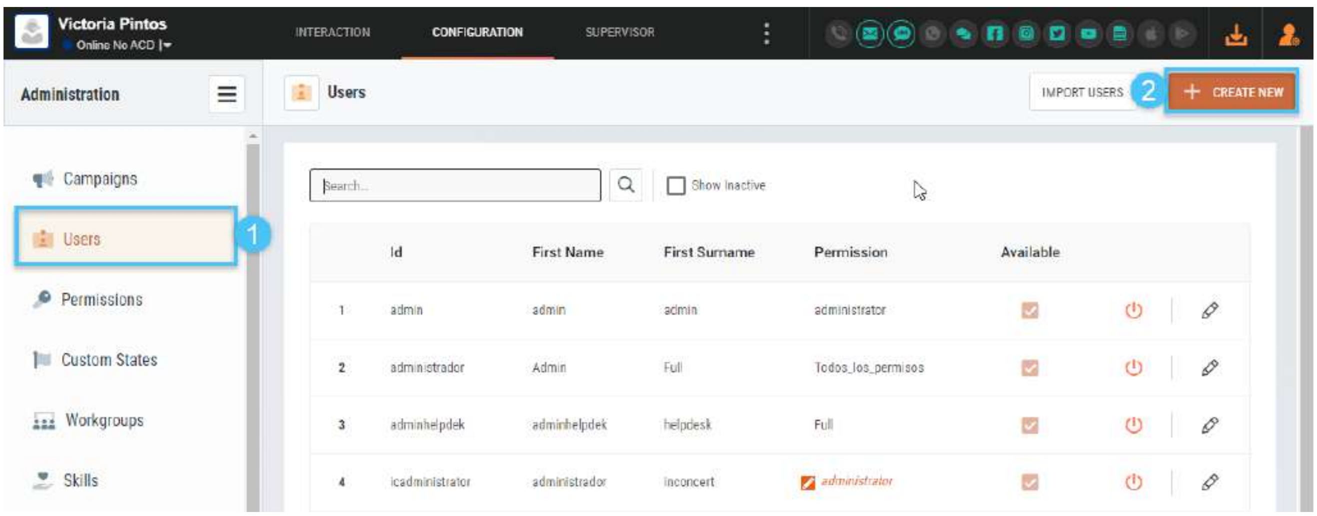
To create a user, only the role to be assigned needs to have been defined. Depending on their permissions, OCC users will be able to manage interactions, configure settings, supervise the operation of the Contact Center and access reporting. For further information, see "How to edit a role's permissions".

To create a user::

1. Go to the "Configuration" tab:

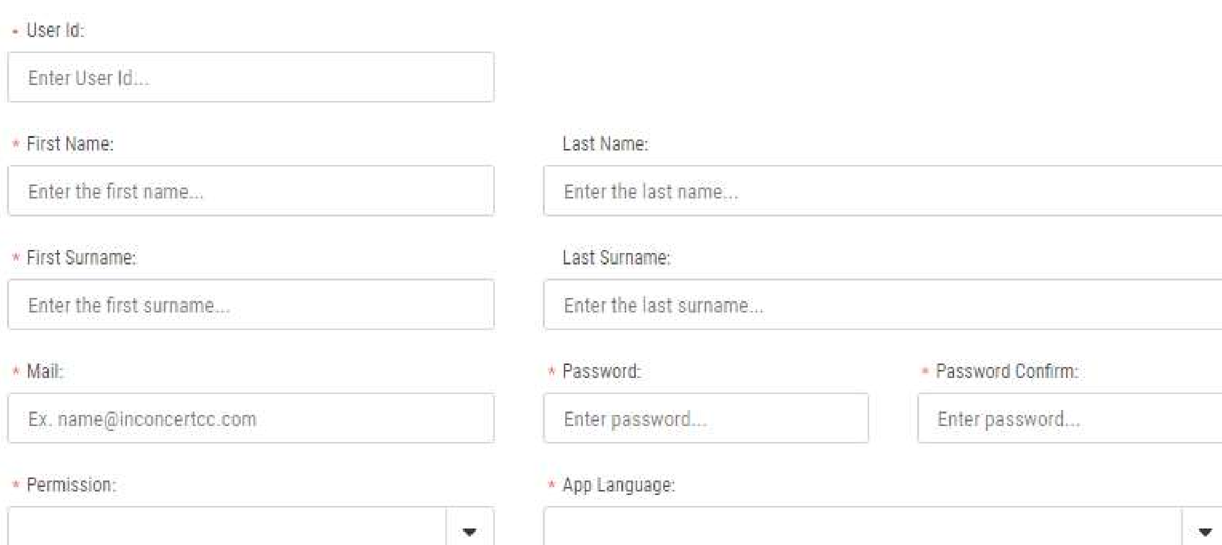


2. Click on the "Users" section 1 and then click the "New User" button 2 :



3. Enter the required data:

   a. **General information:**



User ID: user’s unique identifier within the system. You must enter the user’s name(s) and surname(s), as well as their password and email.

Permissions: role assigned to the user.

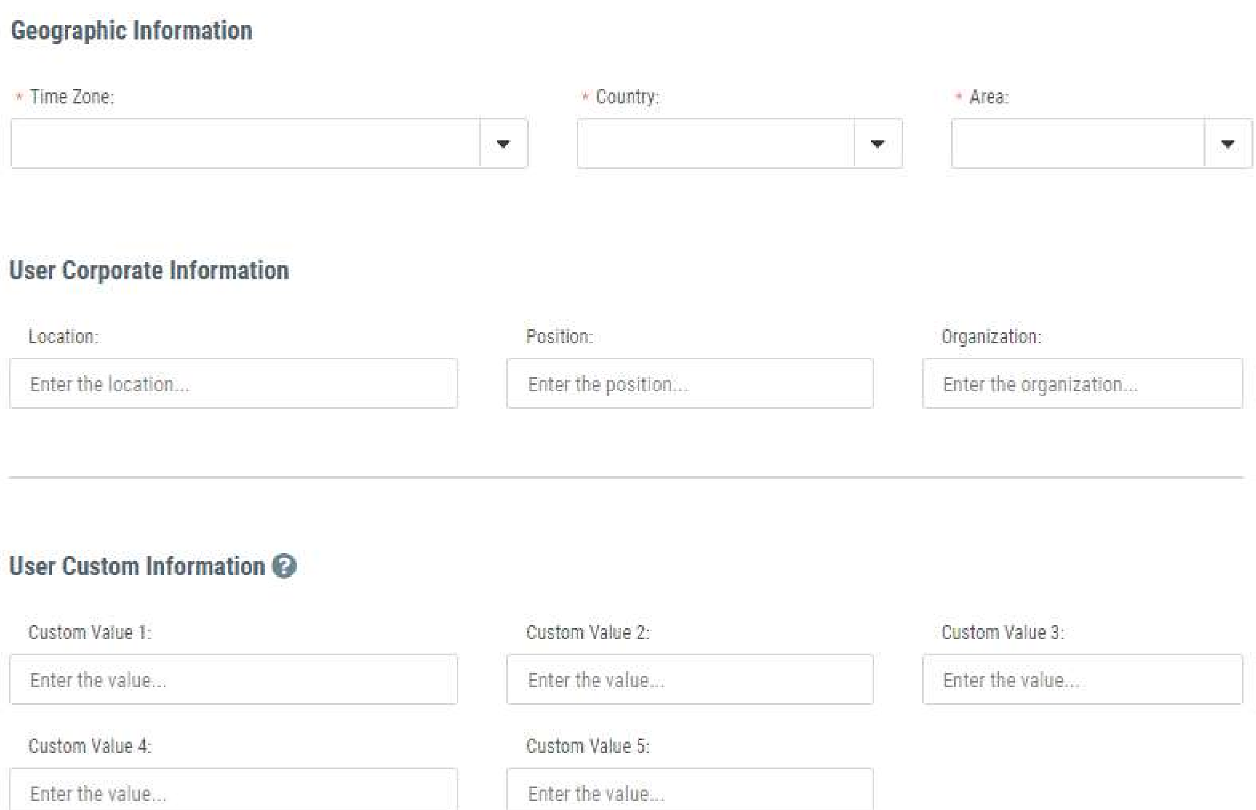
The system has three predefined roles: *Administrator, Agent* and *Supervisor*. Each role has a set of associated permissions. These permissions can be modified, as well as creating new roles according to functional requirements. For further information, see "How to edit a role’s permissions".

Language: language in which the user will see the interface.

b. **Telephony Integration:**

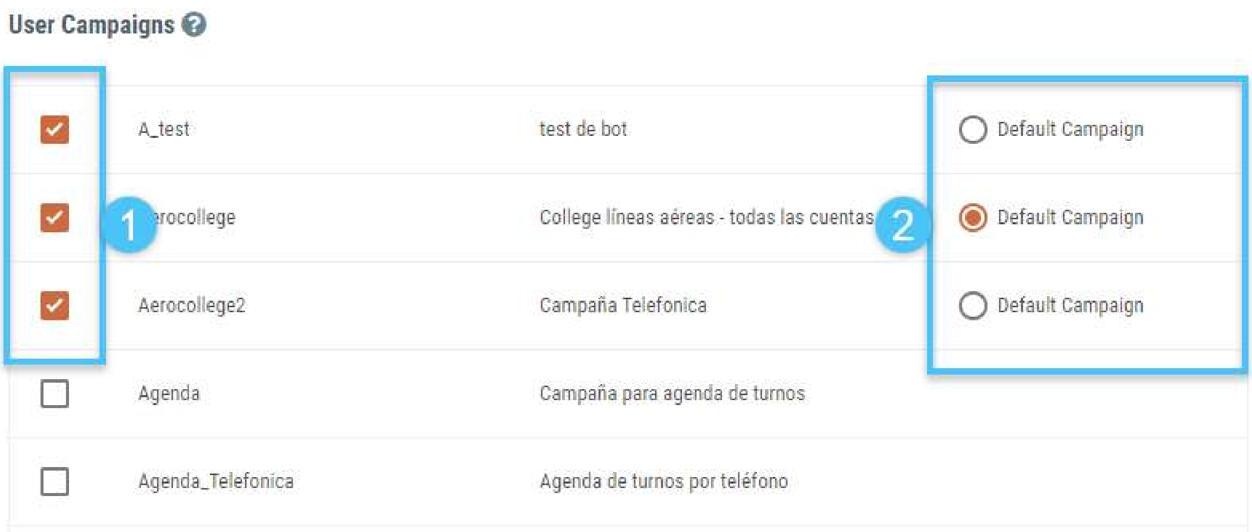
From the drop-down list, select the telephone extension that will be assigned to the user. This extension will have been preset during installation.

c. **Geographic, Company and Custom Information:**



Fill in the fields required to configure Geographic, Company and Custom Information related to the user.

User Campaigns: check the boxes for the campaigns to which the user will belong 1 and, if you have selected the "Agent" role, specify the default campaign 2 :



4. After filling in all the fields required, click the "CREATE" button to create the user.
5. To save the new user and create another one, click the "CREATE & CONTINUE" button.
6. To cancel the operation without saving the data entered, click the "CANCEL ACCOUNT" button.

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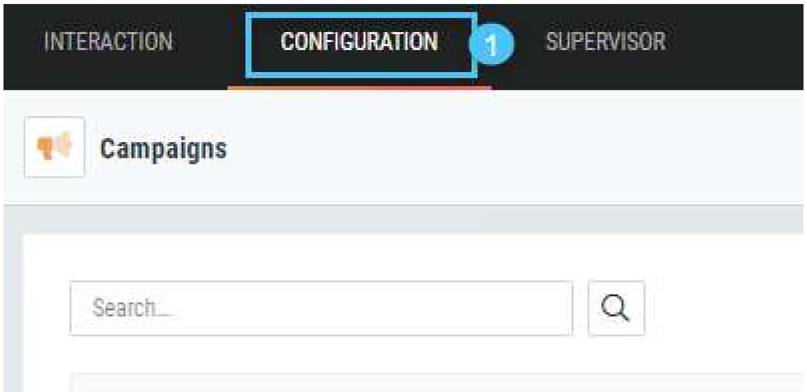
How to deactivate/activate a user

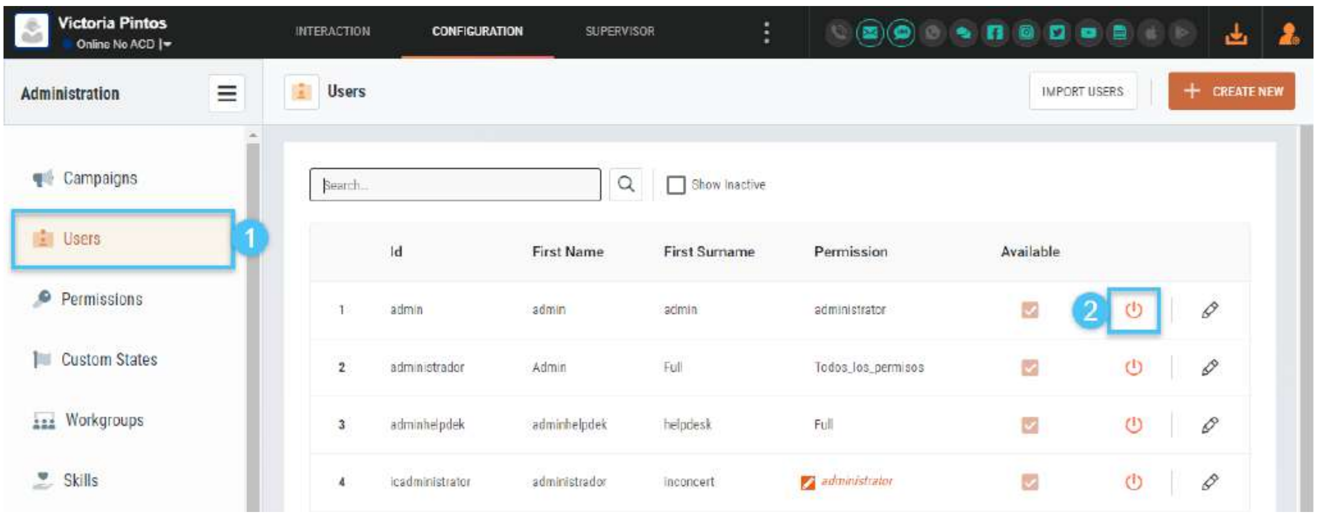
If you want to remove a particular user from the system, it is not necessary to delete the user. A user can be deactivated, and if desired, reactivated later. The settings will be kept, avoiding the need to create the user again.

To deactivate a user:

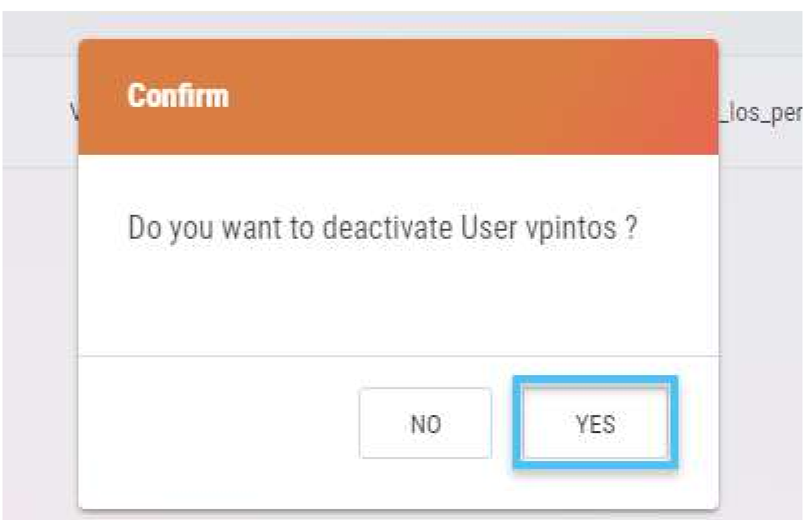
1. Go to the "Configuration" tab:



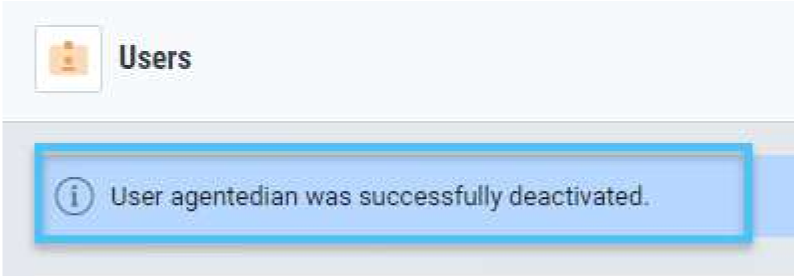
2. Click on the "Users" section 1 and then click the "Deactivate" button for the desired user 2 :



3. Click the "Yes" button to confirm deactivation of the user:

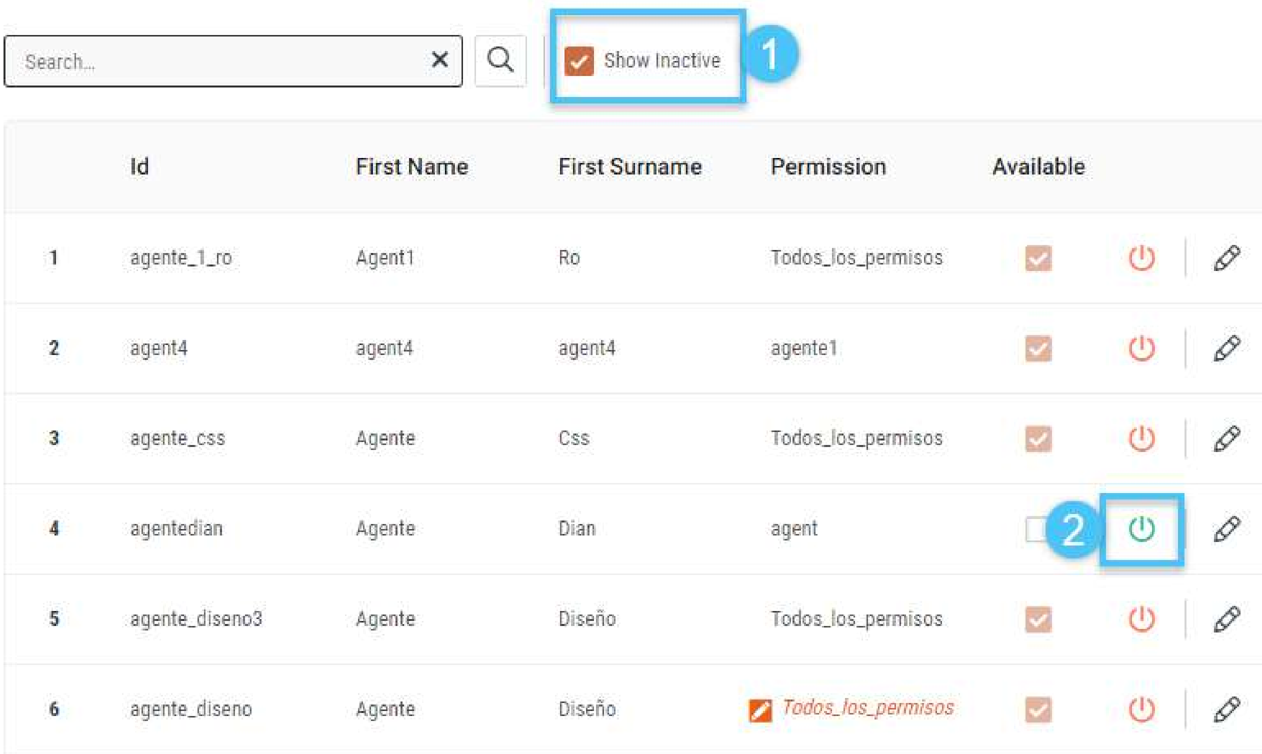


4. A message confirming successful deactivation of the user is displayed:



⚠ In the event that the user has conversations assigned or is logged into the system, deactivation will not be possible.

5. To reactivate the user, check the "Show Inactive" box 1, click the "Search" button and then press the "Activate" button for the desired user 2:



	Id	First Name	First Surname	Permission	Available
1	agente_1_ro	Agent1	Ro	Todos_los_permisos	
2	agent4	agent4	agent4	agente1	
3	agente_css	Agente	Css	Todos_los_permisos	
4	agentedian	Agente	Dian	agent	
5	agente_diseno3	Agente	Diseño	Todos_los_permisos	
6	agente_diseno	Agente	Diseño	Todos_los_permisos	

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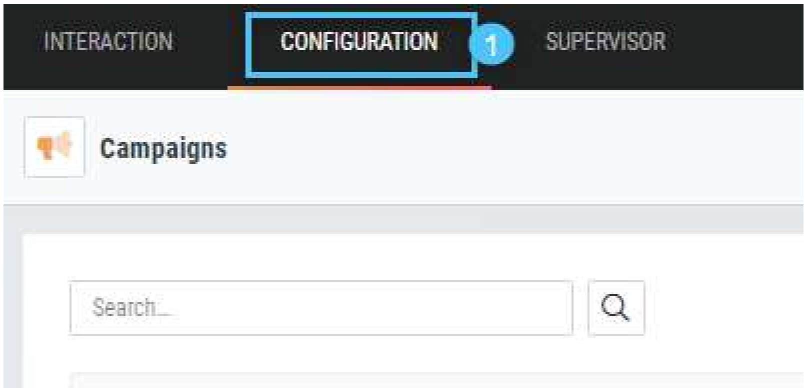
How to edit a user

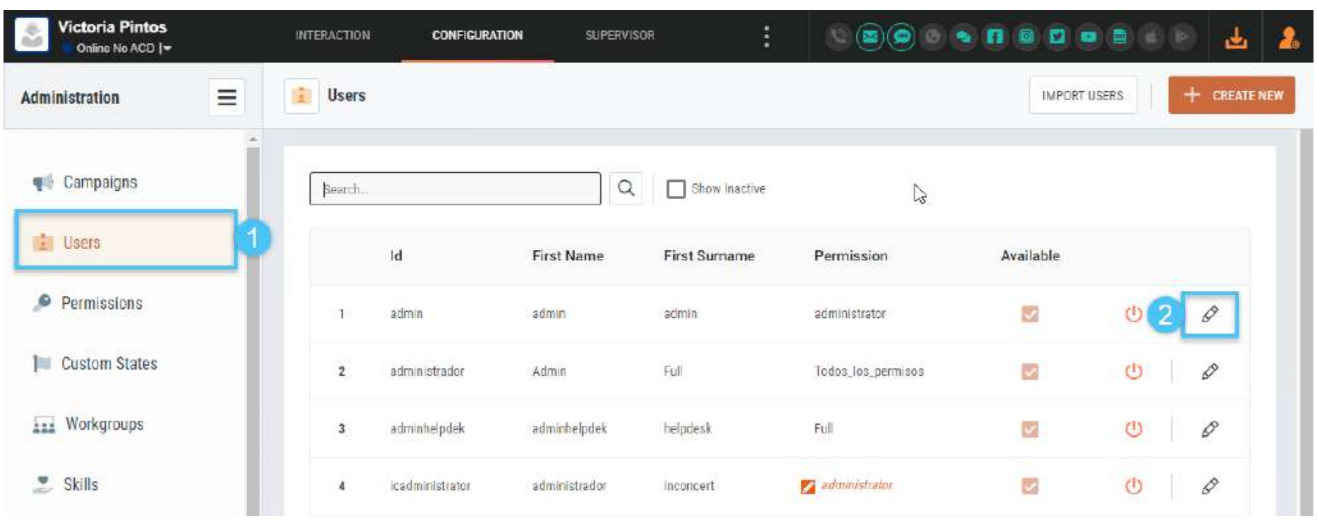
After creating a user, it can be edited. Should the user be logged into the system, it will not be possible to edit the permissions associated with the user's role.

To edit a user:

1. Go to the "Configuration" tab:



2. Click on the "Users" section and then click the "Edit" button for the desired user :



The User ID can not be edited.

3. After editing, click the "EDIT" button to save any changes for that user.
4. To cancel the operation without saving any changes, click the "CANCEL" button.

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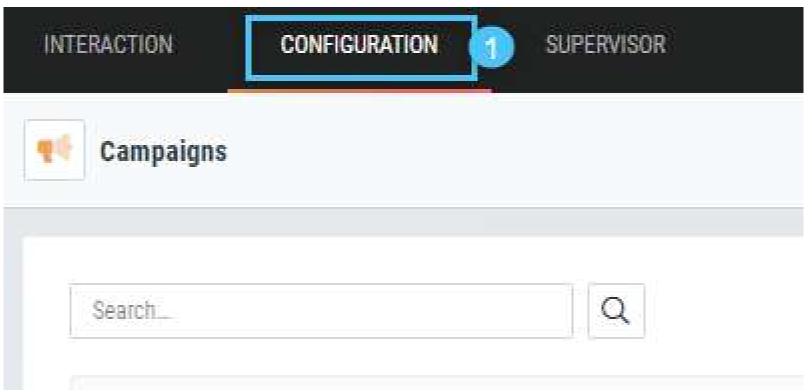
How to overwrite permissions for a particular user

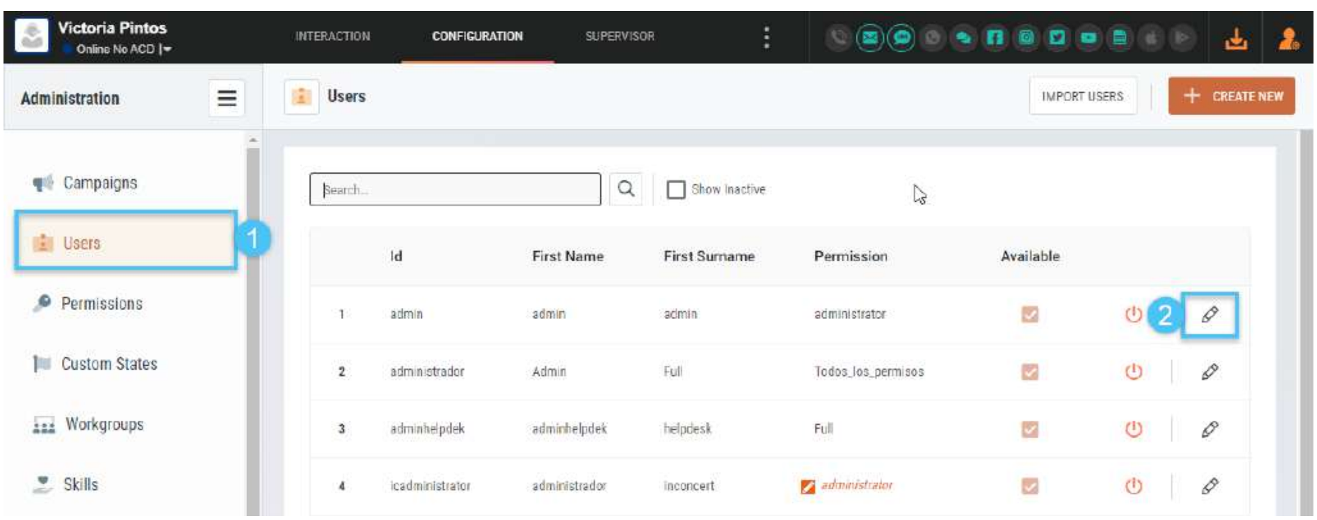
If you need a user in your contact center to have particular permissions that are not associated with the role assigned to them or, on the other hand, to restrict any permission associated with their assigned role, you can overwrite that user's permissions at any time by editing the user.

To overwrite permissions for a particular user:

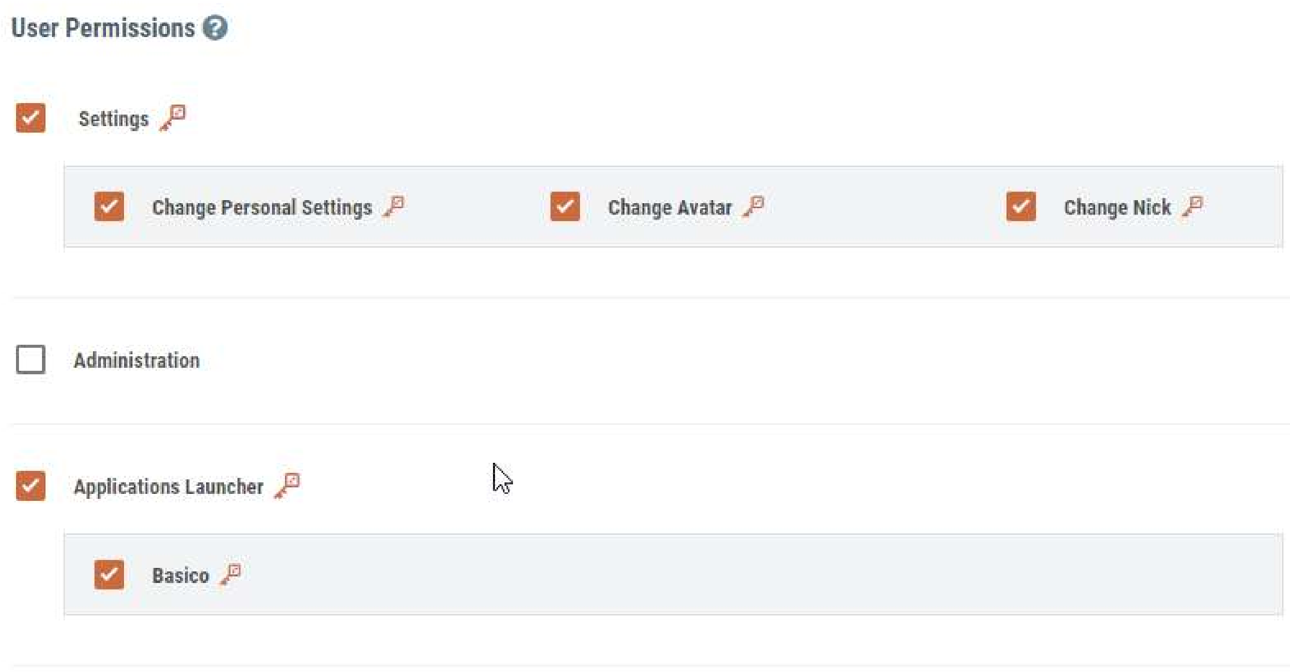
1. Go to the "Configuration" tab:



2. Click on the "Users" section  and then click the "Edit" button for the desired user  :



3. Go to " User Permissions" and, to overwrite the user's permissions, check the relevant box:



By checking the box for a permission or for a set of permissions, the corresponding permissions will be enabled. On the other hand, if the box for a permission or a set of permissions is unchecked, the corresponding permissions will be disabled.

In this way, the user's permissions will be overwritten for all the campaigns to which the user has been assigned. To modify user permissions for a particular campaign to which they are assigned, see "How to overwrite sets of permissions for a user of a particular campaign".

4. After overwriting the permissions, click the "SAVE" button to save the changes to the permissions.
5. To cancel the operation without saving any changes, click the "CANCEL" button.
6. To remove the changes made to the permissions, press the "REMOVE OVERRIDES" button.

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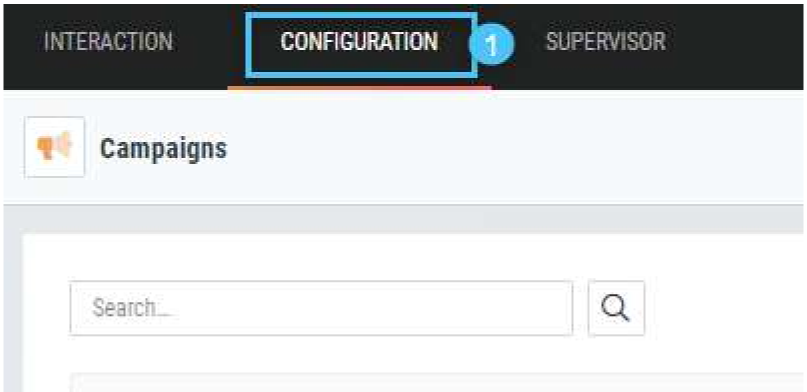
How to set a default campaign for a user

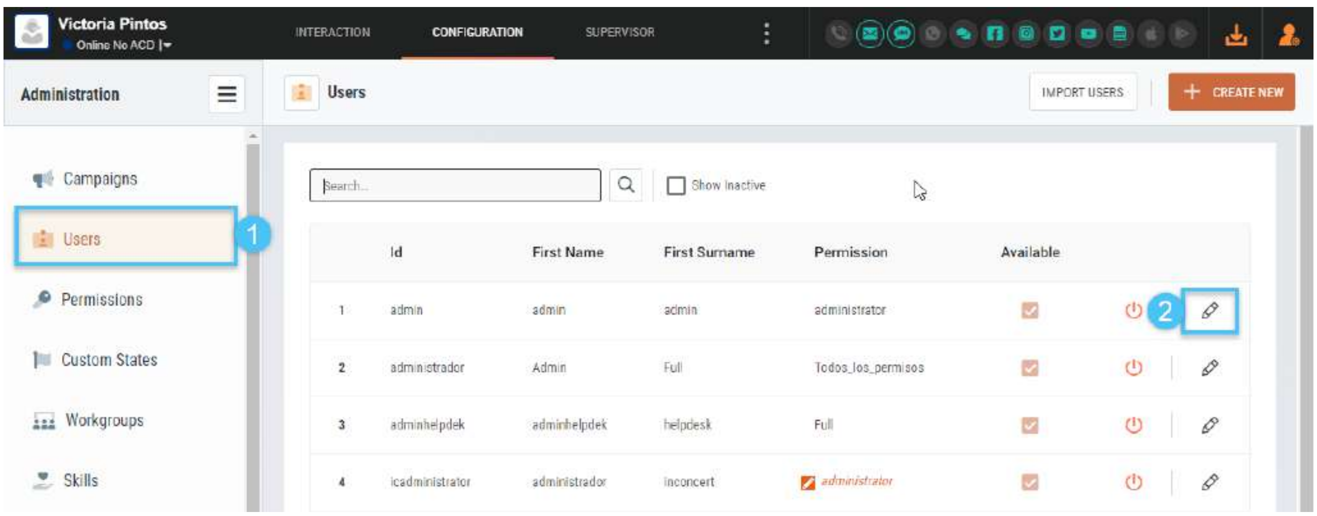
Setting a default campaign for a user enables this campaign to be automatically selected when the user undertakes an outbound interaction.

To set a default campaign for a user:

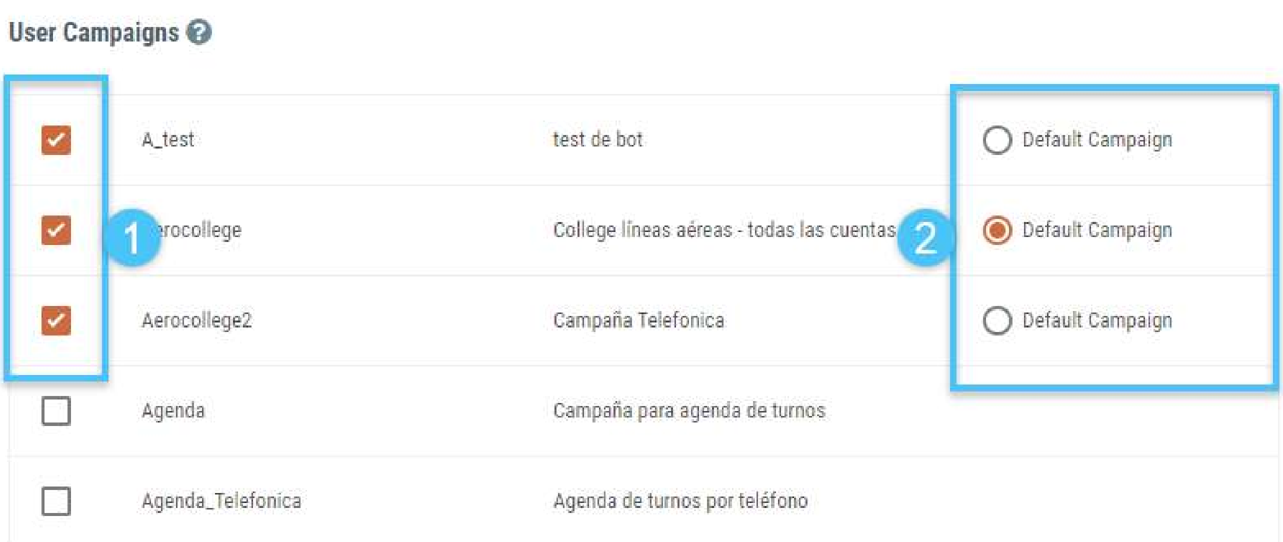
1. Go to the "Configuration" tab:



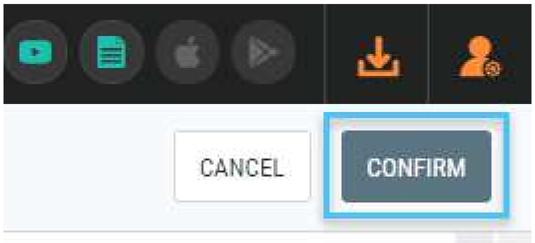
2. Click on the "Users" 1 section and then click the "Edit" button for the desired user 2 :



3. Go to the campaigns section and ***select the campaign*** that you want to be the user's default campaign.



4. ***Click the Update button*** to save the changes made.



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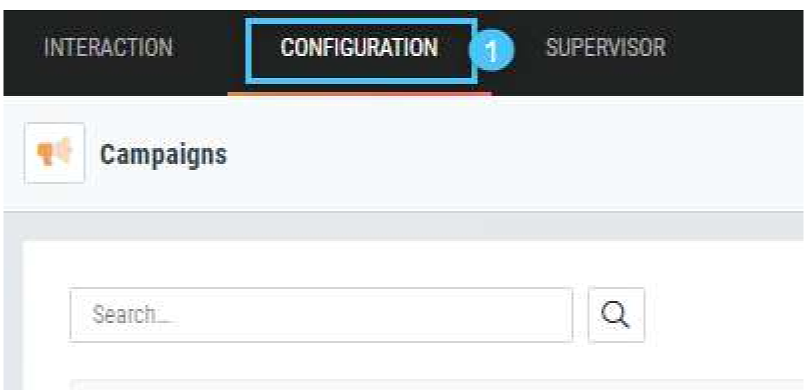
Mass import of users-Administrators

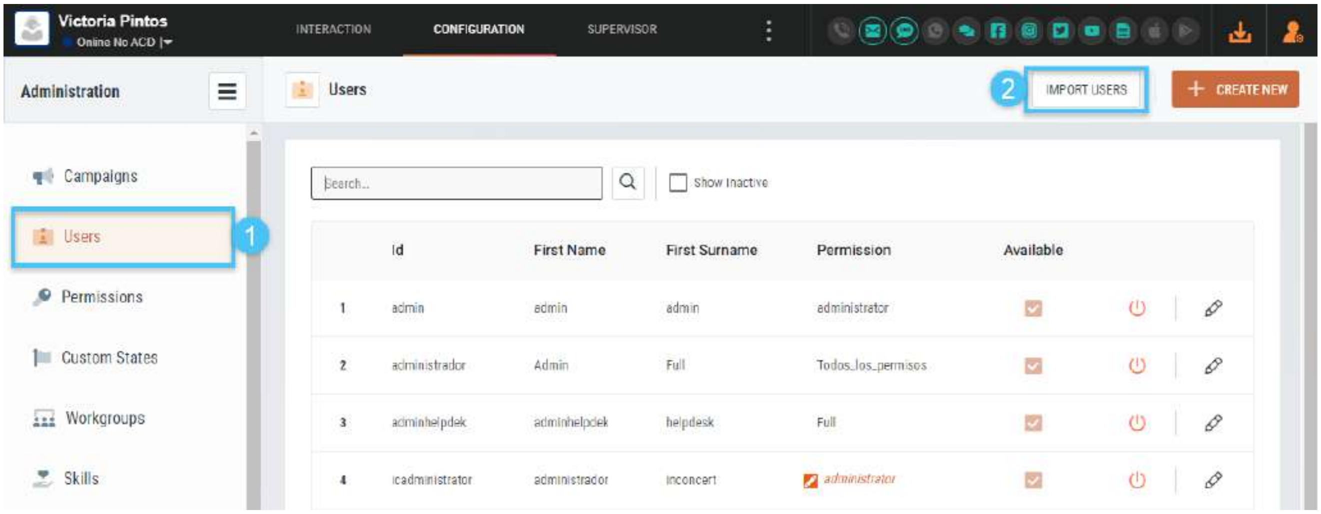
Sometimes it is necessary to register more than one user

To do so you must:

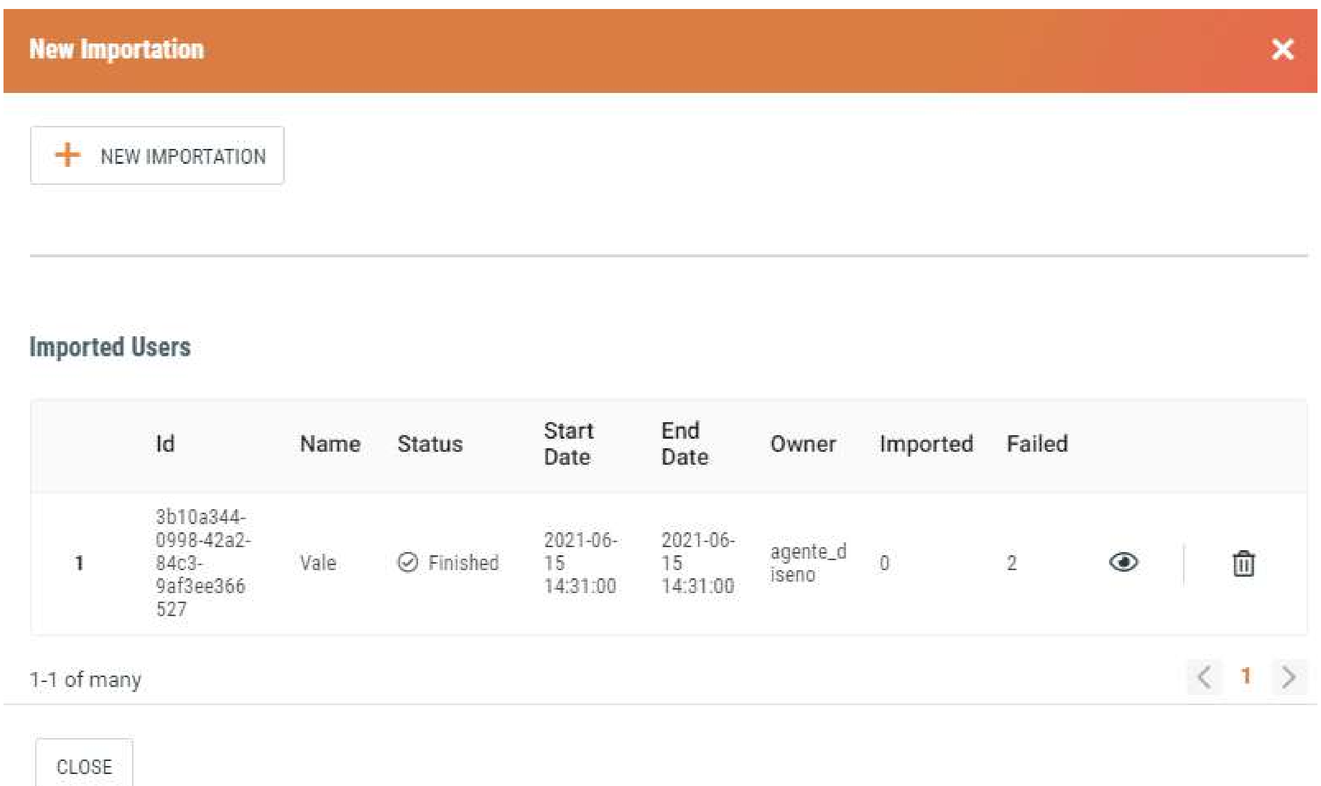
1. Go to the **"Configuration"** tab  :



2. Click on the ***"Users"***  section and then press the ***"Import users"*** button  :



From there it will be possible to import Excel spreadsheets with the list of users.

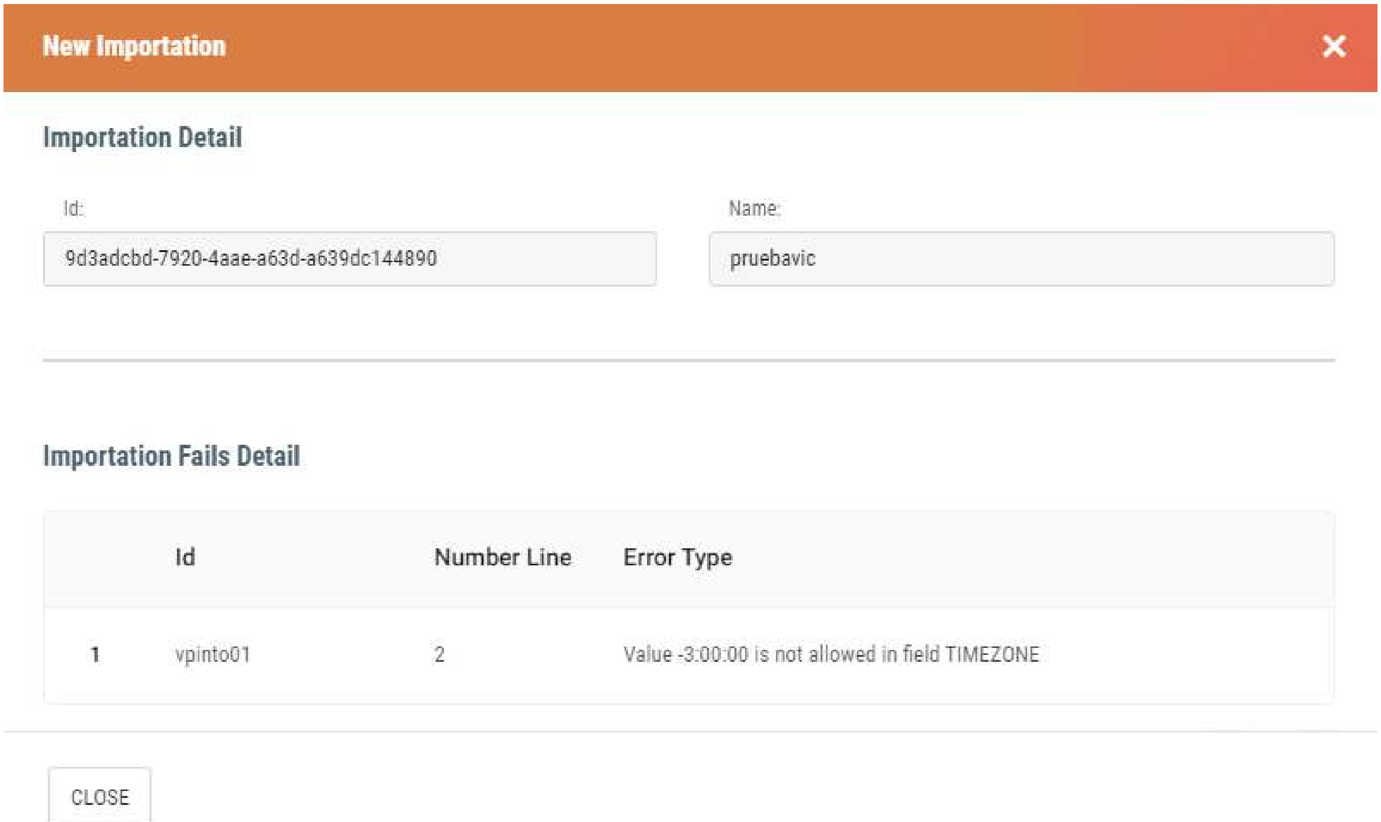


The Excel spreadsheet may have a set of fixed columns, some of which are mandatory and others are not:

Column Name	Required	Description
UserId	YES	User identifier. The same validations will be carried out on this value as when the user is created from the interface.
Group	YES	Identifier of the group or role that you want associated with the user. The possible values here are:

		• agent • administrator • supervisor • any custom role that has been created in the VCC.
Name	YES	User name
LASTNAME	YES	User last name
TIMEZONE	YES	TimeZone associated with the agent. The possible values are those presented in the ID column of the following Excel: Time Zones.xlsx
COUNTRYCODE	YES	Country Code associated with the user. The possible values are those presented in the COUNTRYCODE column of the following Excel: Country_Areas.xlsx
AREACODE	YES	Area Code associated with the user. The possible values are those presented in the AREACODE column of the following Excel: Country_Areas.xlsx
Password	NO	Password that will be assigned to the user. If a value is not entered, it will be assigned the value of the column "User ID".
Mail	NO	Email address assigned to the user.
Language	NO	Language associated with the user. Possible values are: • EN • ES • FR
InitialState	NO	Initial state that will be associated with the user each time they enter the application. Possible values are all agent states that exist on the VCC. The default value if a specific value is not placed is "Break".
Campaigns	YES/NO	List of campaigns associated with the user. If it is more than one campaign, the list must be separated by ";". This is a required value as long as the selected group or role has permissions on the Interaction app.
DEFAULT CAMPAIGN	YES/NO	Campaign that the user will have by default. As in the previous field, this is a required value if the user has permissions on the app interaction.
PHONE SERVICE	NO	Value only used for VCC with OCC integration. Corresponds to the Telephony Service associated with the agent's peer. It will be a value such as "TELEPHONY_192_168_24_60". The same can be obtained in the Phone field that is shown in the user creation form.
PHONE PEER	NO	Extension number associated with the agent.
PHONE TECHNOLOGY	NO	Technology associated with the user's peer. Possible values are: "ASTERISK_SIP" or "ASTERISK_IAX"

Once the import is done, the number of users that were created correctly and the number of users with errors will be displayed. The errors will be displayed in the same interface:



Roles and Permissions

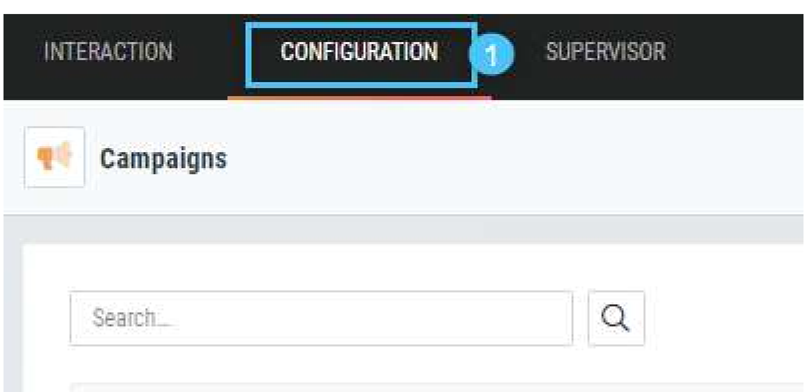
- How to define a new role
- How to edit a role's permissions
- How to delete a role
- What is a role?

How to define a new role

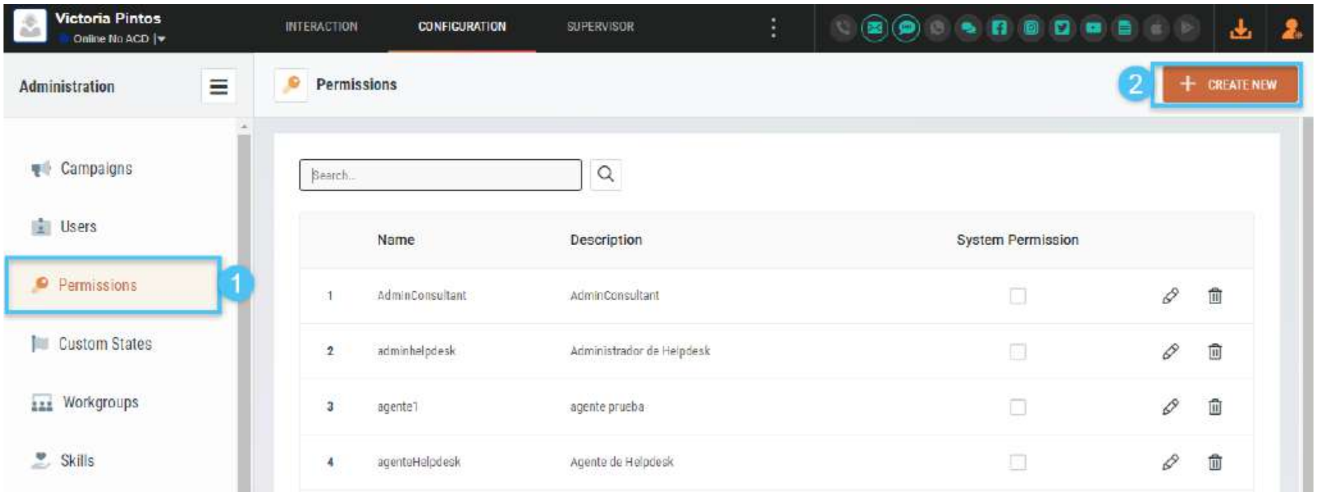
You can define a new role if you want some users to have a combination of permissions that correspond to each of several of the system's predefined roles. *For example, you might want to have an Agent user with some Supervisor and Administrator permissions (SuperAgent).*

To define a new role:

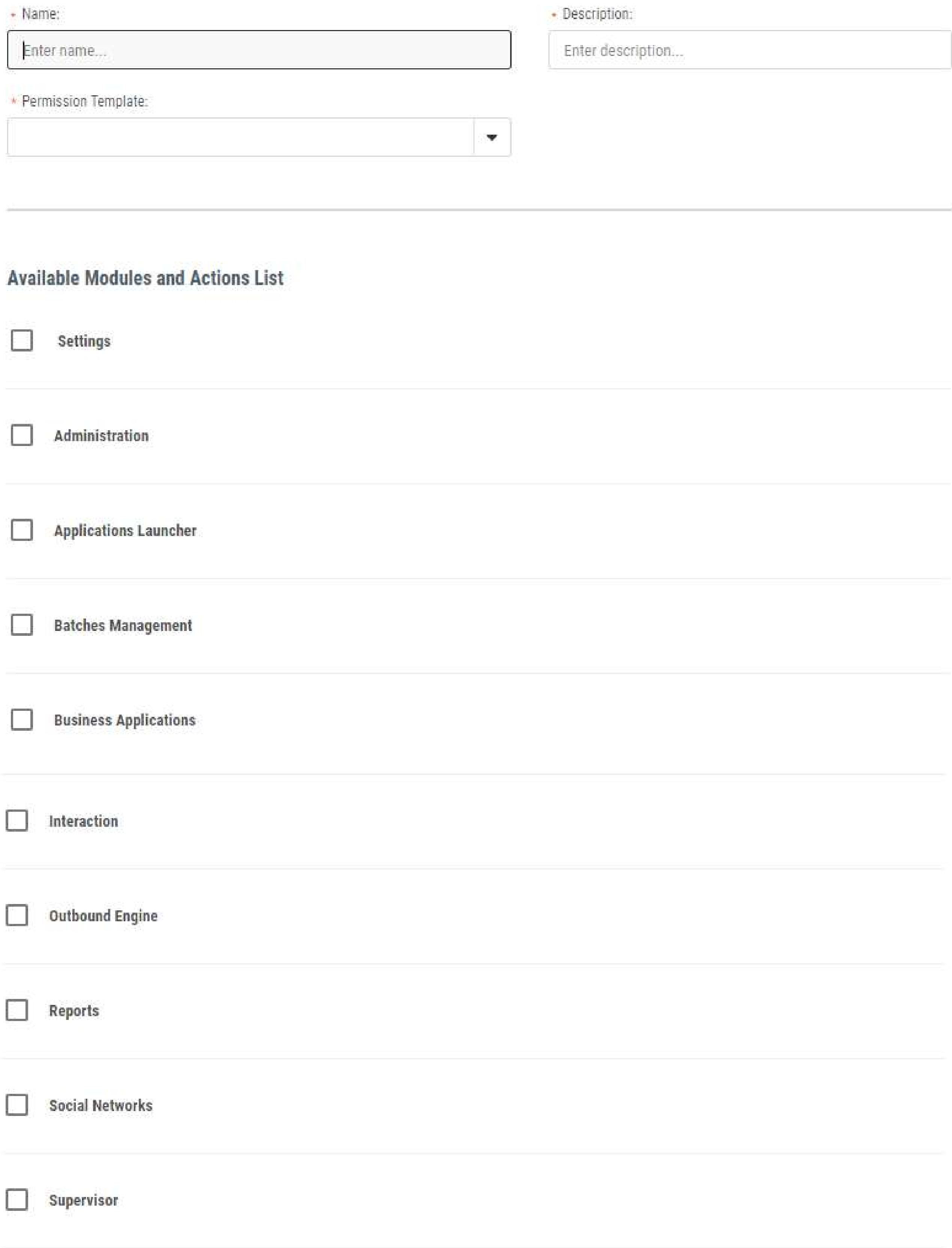
1. Go to the "Configuration" tab:



2. Click on the "Permissions" section 1 and then click the "NEW ROLE" button 2 :



3. Enter the required data:



Name: name that will identify the role in the system.

Description: description of the role.

Permissions Template: predefined roles are listed; the role can be created based on any of these. The option to select all of them or none is also listed.

Available Modules and Actions List: you can select each of the modules shown to add them to the new role, as well as restrict or expand the permissions associated with each one. If one of the system roles is selected in the permissions template, the modules corresponding to that role will be automatically marked. This section is ideal for combining the new role's permissions. For example, if you want to have an Agent role with some Supervisor and Administrator permissions (SuperAgent), you must select the Agent role and assign the permissions that you require from the Supervisor and Administration module for the new role.

4. After filling in all the required fields, click the "CREATE" button to create the role.
5. To save the new role and create another one, click the "CREATE & CONTINUE" button
6. To cancel the operation without saving the entered data, click the "CANCEL" button.

Related Articles

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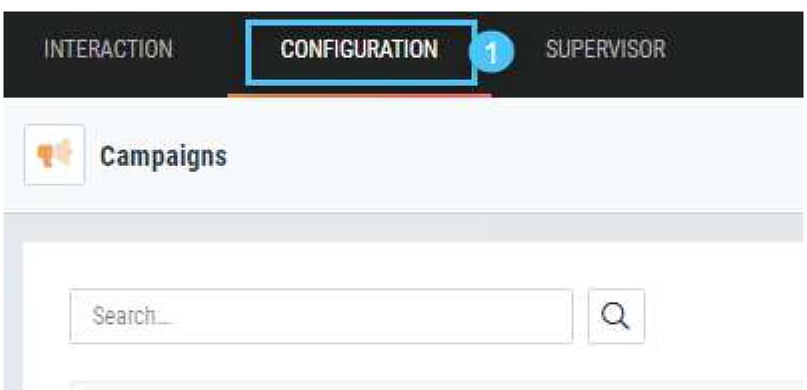
How to edit a role's permissions

After creating a role, you can edit it to restrict or expand the sets of permissions that you have defined for that role. You can continue combining permissions corresponding to predefined roles in the same way, or even add permissions that belong to a role and had not been assigned at the time of creation.

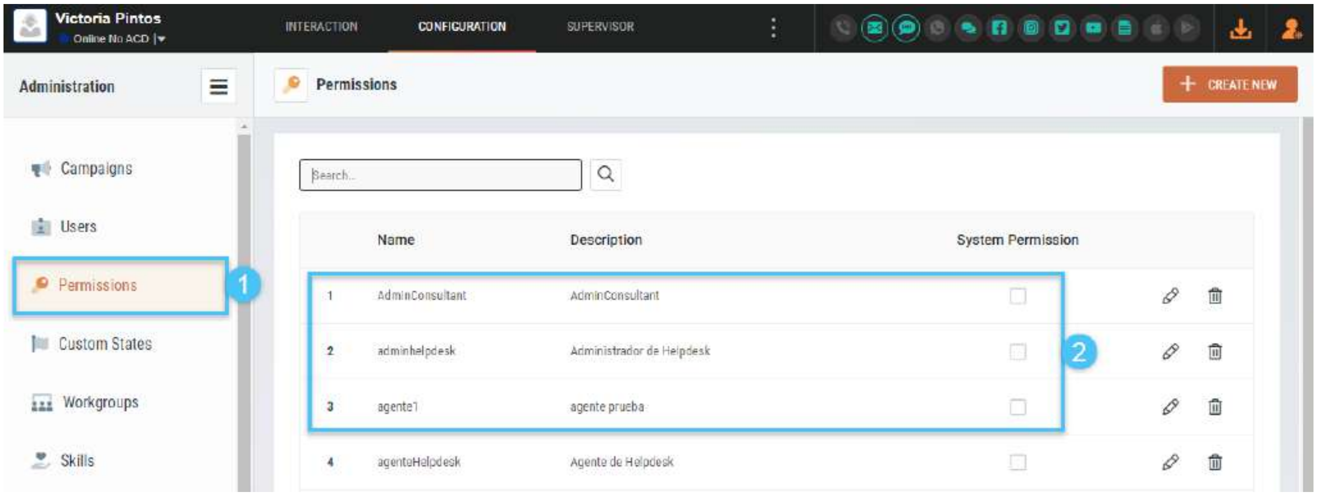
The system's predefined roles cannot be edited.

To edit a role's permissions:

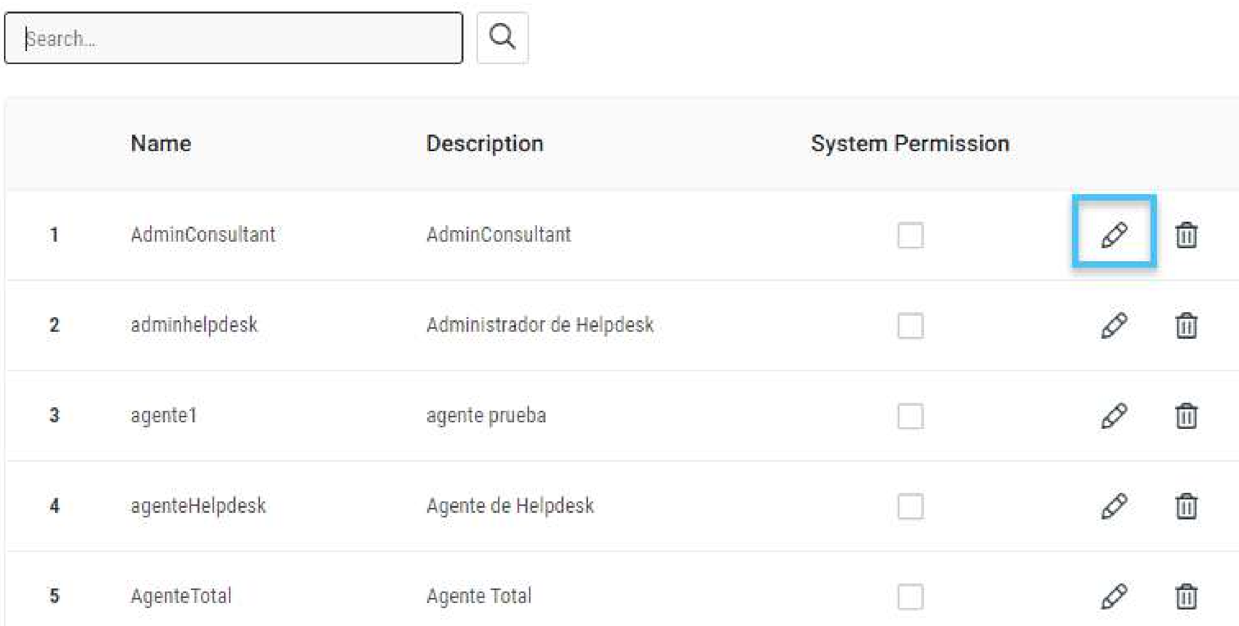
1. Go to the "Configuration" tab:



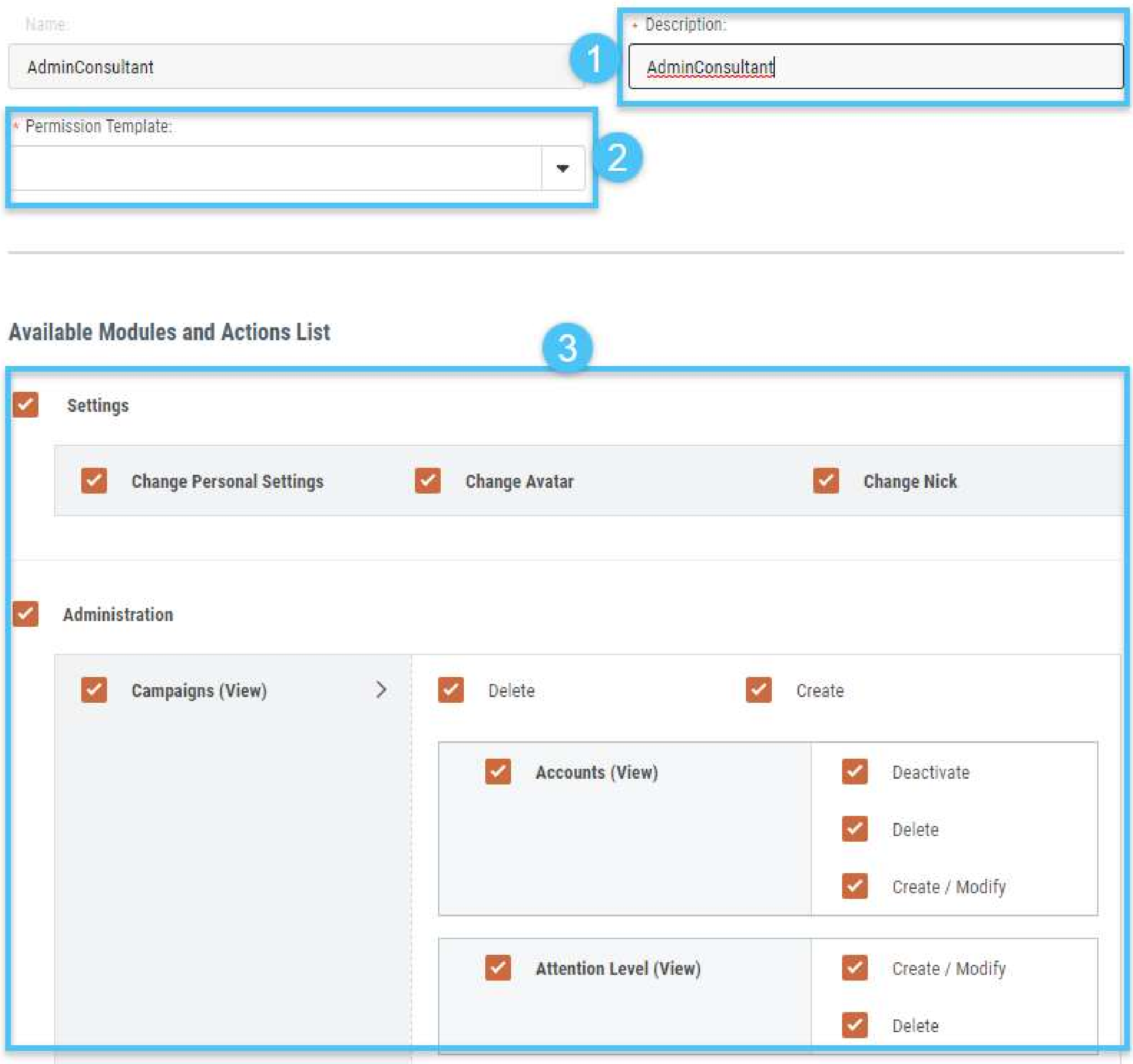
2. Click on the "Permissions" section ; the roles created by the System Administrator will be displayed :



1. Click the "Edit" button for the role you want to edit:



2. Make the necessary modifications::



1 : edit the role’s description.

2 : select one of the predefined roles from the drop-down list. The option to select all of them or none is also listed.

3 : al marcar la by checking the box for a permission or a set of permissions, you are enabling the corresponding permissions;if the box for a permission or set of permissions is unchecked, the corresponding permissions will be disabled.

The name of the role cannot be edited.

3. After editing, click the "EDIT" button to save any changes.
4. To cancel the operation without saving any changes, click the "CANCEL" button.

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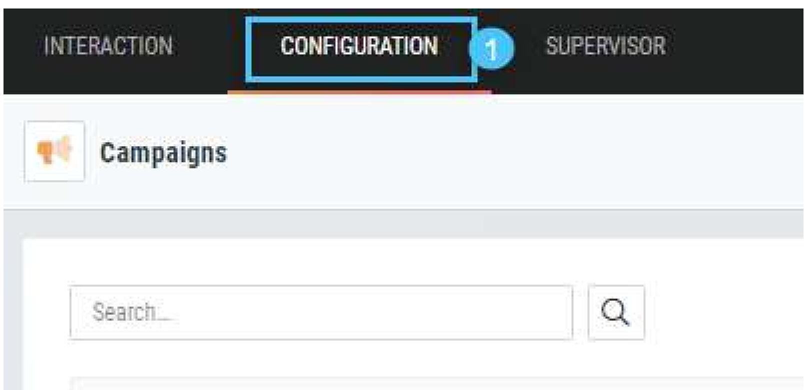
How to delete a role

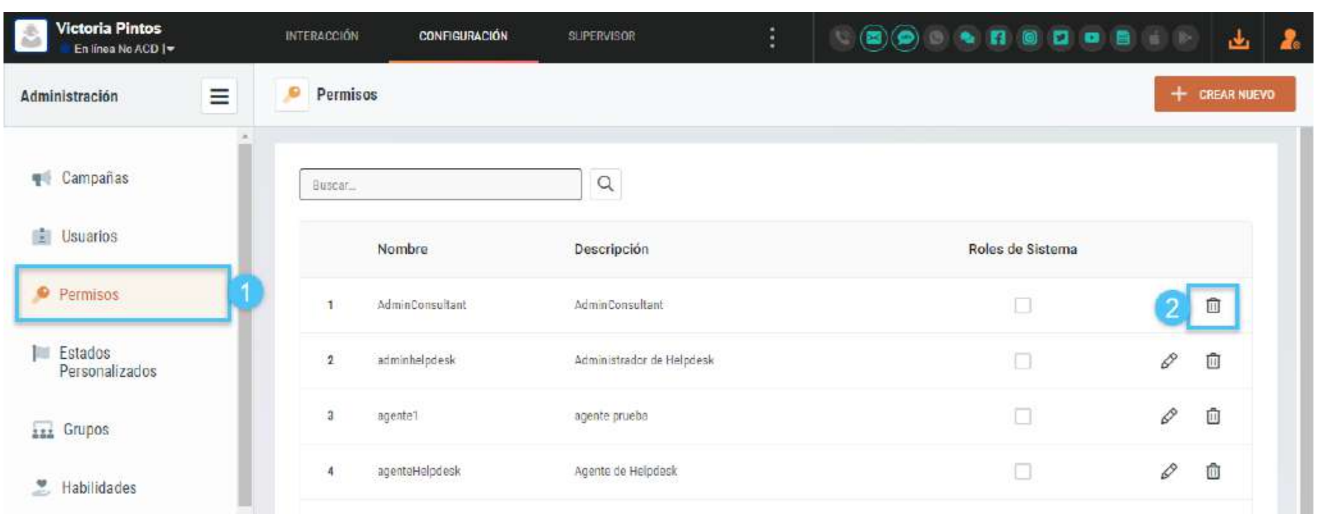
Once you want to stop using a role you have created, you can easily delete it. Bear in mind that in order to delete a role, you must first disassociate it from all the users to whom it has been assigned, otherwise you will not be able to delete it.

To delete a role:

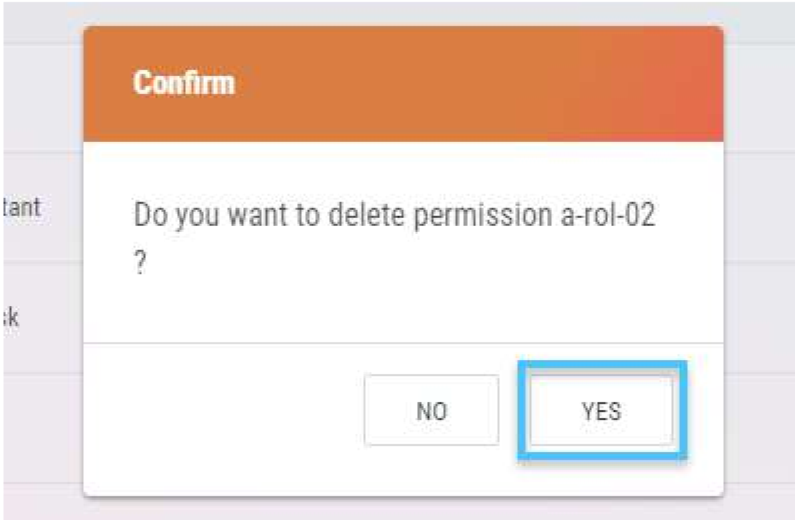
1. Go to the "Configuration" tab:



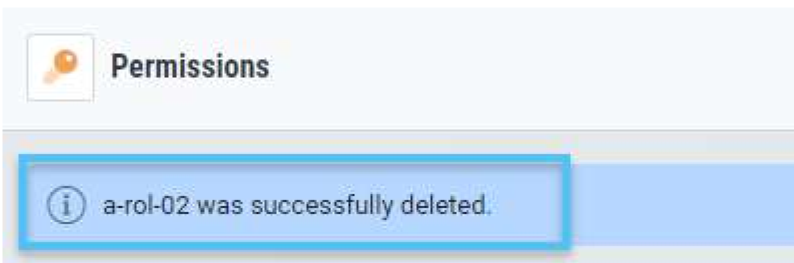
2. Click on the "Permissions" section 1 ; and then click the "Delete" button for the role you want to delete 2 :



3. Click the "Yes" button to confirm the deletion of the role:



4. A message confirming successful deletion of the role is displayed:



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What is a role?

A role is the function that a user performs within the Contact Center. Depending on the role, the user will be associated with a specific group of permissions that will allow them to fulfill various functions on the platform.

OCC has three predefined roles, as follows:

1. **Administrator**

   The administrator role has permission to access the following platform modules:

   a. Settings
   b. Administration (except Rules)
   c. Interaction
   d. Reports
   e. Supervision
2. **Agent**

   The agent role has permission to access the following platform modules:

   a. Interaction (except adding words to the spellchecker and global search).

3. **Supervisor**

   The supervisor role has permission to access the following platform modules:

   a. Settings
   b. Interaction
   c. Reports (Reports viewer only)
   d. Supervision

A new role can also be defined, combining privileges from each of the existing roles to set up the required level of access, thus adding control and flexibility to user roles. To do this, you can use predefined templates and change the privileges to suit Contact Center functionality. For information on how to define a new role, see: "How to define a new role".

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Groups

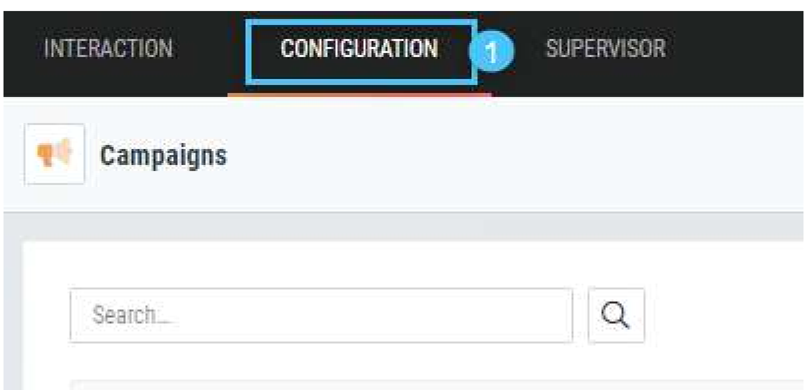
- How to create a group
- How to edit a group
- What are groups for?

How to create a group

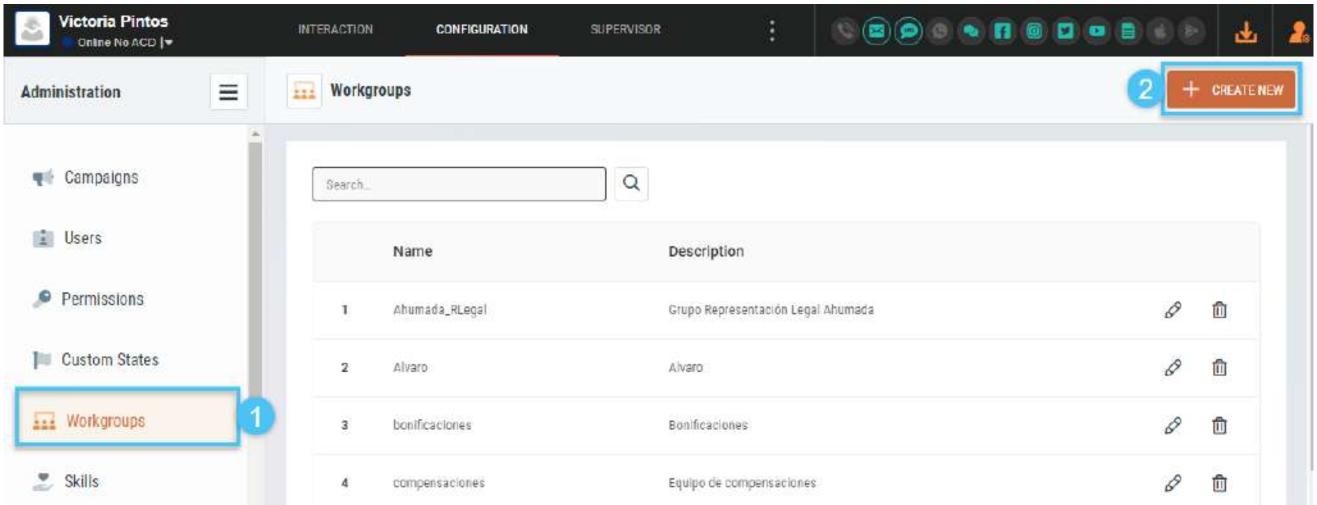
You must group users who have agent permissions to later be able to associate them with a user who has supervisor permissions and can therefore monitor them. In order to group them, you must first create the groups you want.

To create a group:

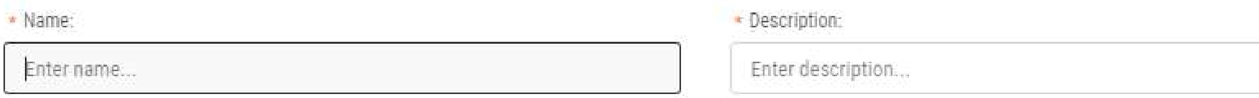
1. Go to the "Configuration" tab:



2. Click on the "Groups" section  and then click the "NEW GROUP" button  :



3. Enter the required data:



> **Name:** name that will identify the group in the system.
>
> **Description:** description of the group.

4. After filling in all the fields required, click the "CREATE" button to create the group.
5. To save the new group and create another one, click the "CREATE & CONTINUE" button.
6. To cancel the operation without saving the entered data, click the "CANCEL" button.

For information on how to associate groups with a user, see "How to associate groups with a user".

Related Articles

- User search
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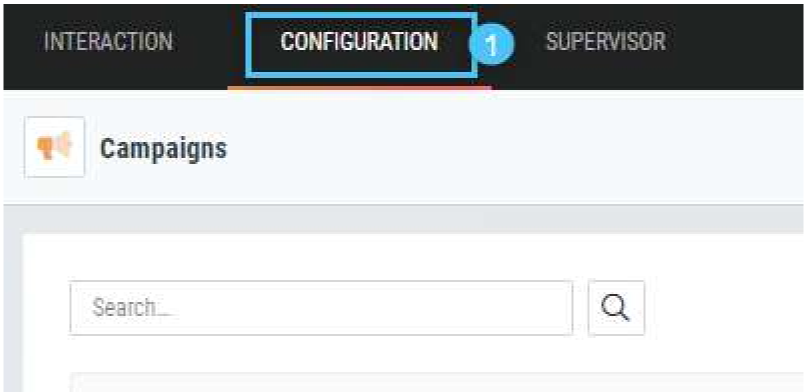
- How to associate an application from the App Store

How to edit a group

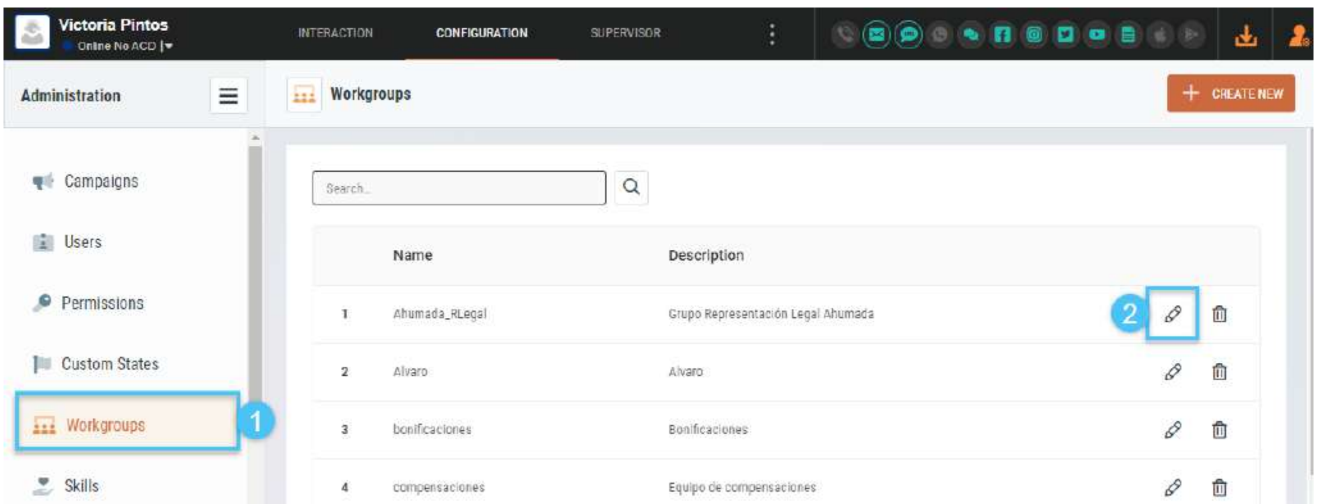
You can edit a group to change its description, but not its name.

To edit a group:

1. Go to the "Configuration" tab:



2. Click on the "Groups" section 1 and then click the "Edit" button for the group 2 :



The group's name cannot be edited.

3. After editing, click the "EDIT" button to save the changes to the group.
4. To cancel the operation without saving any changes, click the "CANCEL" button.

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What are groups for?

Groups are used to be able to associate a number of users who have agent permissions with a user who has supervisor permissions and can therefore monitor them.

This means that you can assign users with agent permissions to the group you want, and then associate this group with the user who has supervisor permissions so that this user can monitor only those users who belong to the associated group. For information on how to create a group, see: "How to create a Group".

Related Articles

- User search
- How to overwrite a user's attention capacity for a specific campaign
- How to delete a skill
- How to edit a skill
- How to define a new skill

Skills

- What are skills?
- How to define a new skill
- How to edit a skill
- How to delete a skill

What are skills?

Skills are abilities that the System Administrator can define in the Contact Center so that they can then be associated with users. Depending on the skills, you will be able to arrange for interactions to be handled in the most efficient way, since an internal algorithm will use the value of each skill to determine which user is the most suitable to handle an interaction. Note that to handle interactions based on users' skills, the System Administrator must configure the ///Distribution of Interactions as "Skill based".

For information on how to define a skill, see: "How to define a new skill".

Related Articles

- User search
- How to overwrite a user's attention capacity for a specific campaign
- How to set up Skill Dialer
- How to delete a skill
- How to edit a skill

How to define a new skill

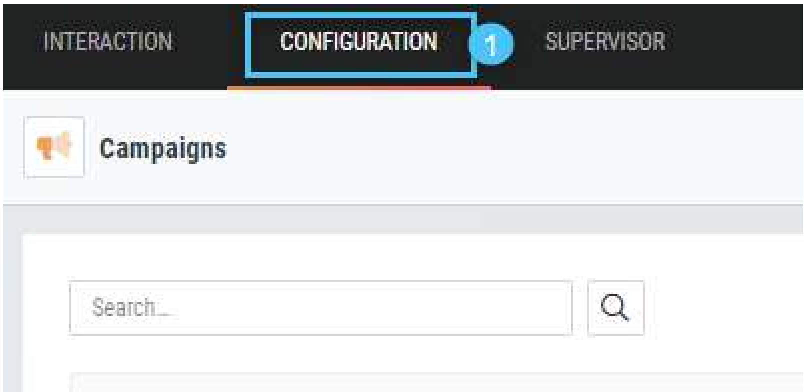
Skills identify users' areas of expertise. In order to associate a skill with a user, you must first define it and be clear about its level in the system, since on this basis you must assign it a value that will be used by an internal algorithm to determine the user to whom an interaction will be delivered.

For information on how to associate a skill with a user, see: "How to associate skills with a user".

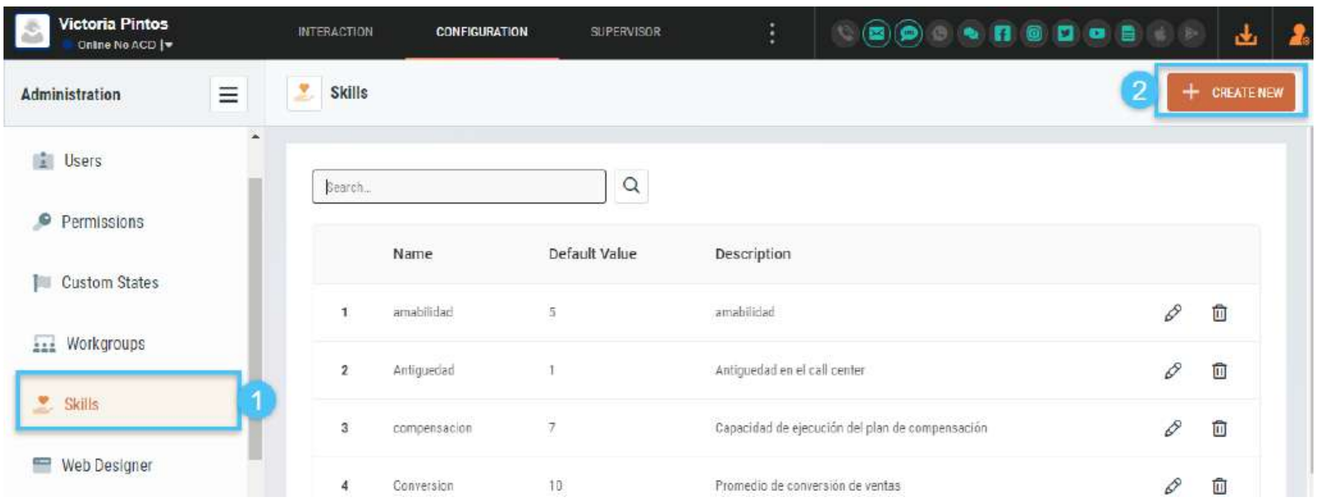
> To handle interactions based on users' skills, the System Administrator must configure the ///Distribution of Interactions as "Skill based".

To define a new skill:

1. Go to the "Configuration" tab:



2. Click on the "Skills" section 1 and then click the "NEW SKILL" button 2 :



For accounts that use the “Skill based” Distribution of Interactions algorithm, all the skills that will be used must be previously created in this section. These skills will be associated with users at the time of their creation.

3. Enter the required data:

Name: name that will identify the skill in the system.

Description: description of the skill.

Default Value: value that indicates the level of skill in a user with agent permissions; the higher this value, the higher the level of skill. The value assigned to the skill together with the weighting that this skill has in the campaign will be entered in an internal algorithm that defines the user to whom an interaction will be delivered, if Distribution of Interactions has been set as “Skill based” in the account.

The default value must be between 1 and 10.

4. After completing all the fields required, click the "CREATE" button to define the new skill.
5. To save the skill and create another, click the "CREATE & CONTINUE" button.
6. To cancel the operation without saving the entered data, click the "CANCEL" button.

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- How to set up Messenger messaging
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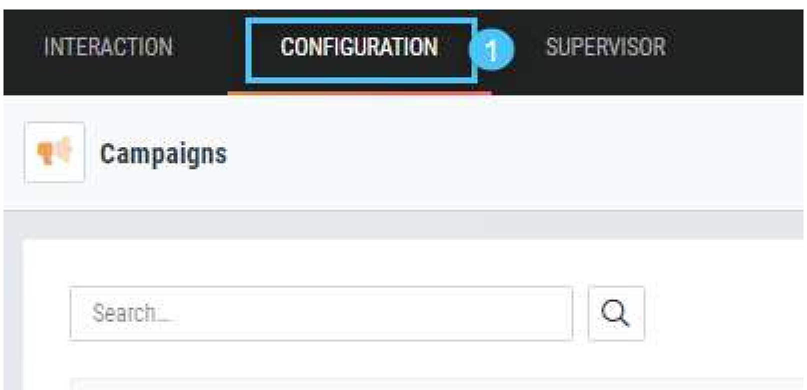
How to edit a skill

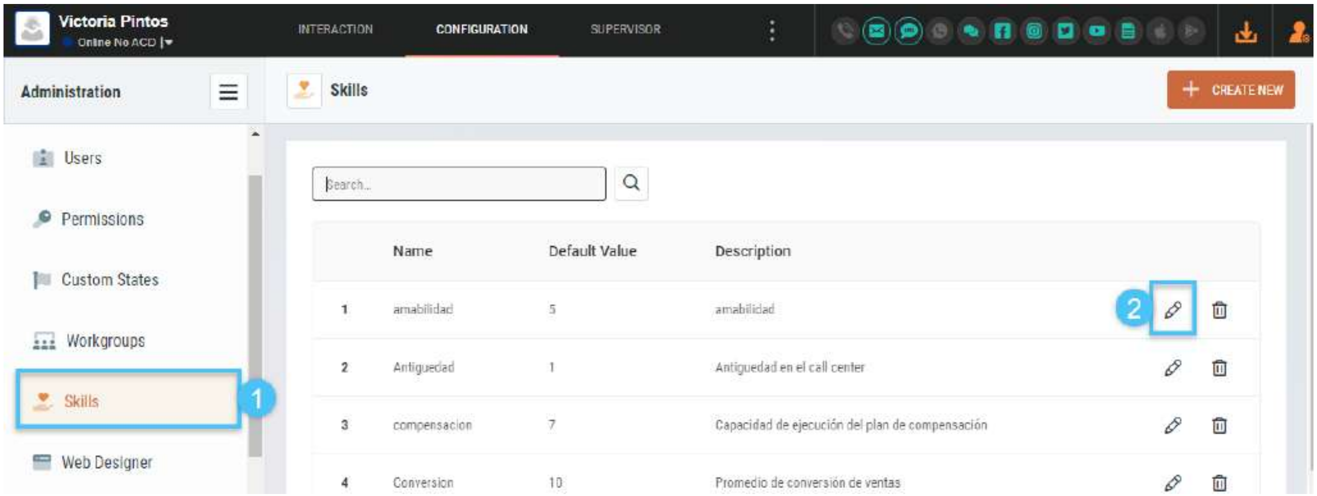
You can edit a skill to change its description and default value in the system, but not its name. Bear in mind that this value is used by an internal algorithm to distribute the interactions to users when the Distribution of Interactions is "Skill based". Therefore, by modifying this value, the level of the skill in the system will also change.

To edit a skill debes:

1. Go to the "Configuration" tab:



2. Click on the "Skills" section 1 and then click the "Edit" button for the skill 2 :



> ⚠ When editing a skill, you can change its Description and Default Value. Bear in mind that when making changes, these will also apply automatically to users who are already associated with this skill. For information on how to associate skills with a user, see "How to associate skills with a user".

3. After editing, click the "EDIT" button to save the changes to the skill.
4. To cancel the operation without saving any changes, click the "CANCEL" button.

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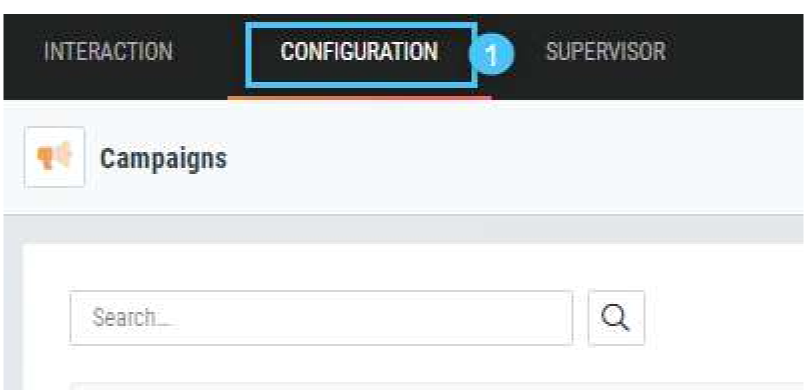
How to delete a skill

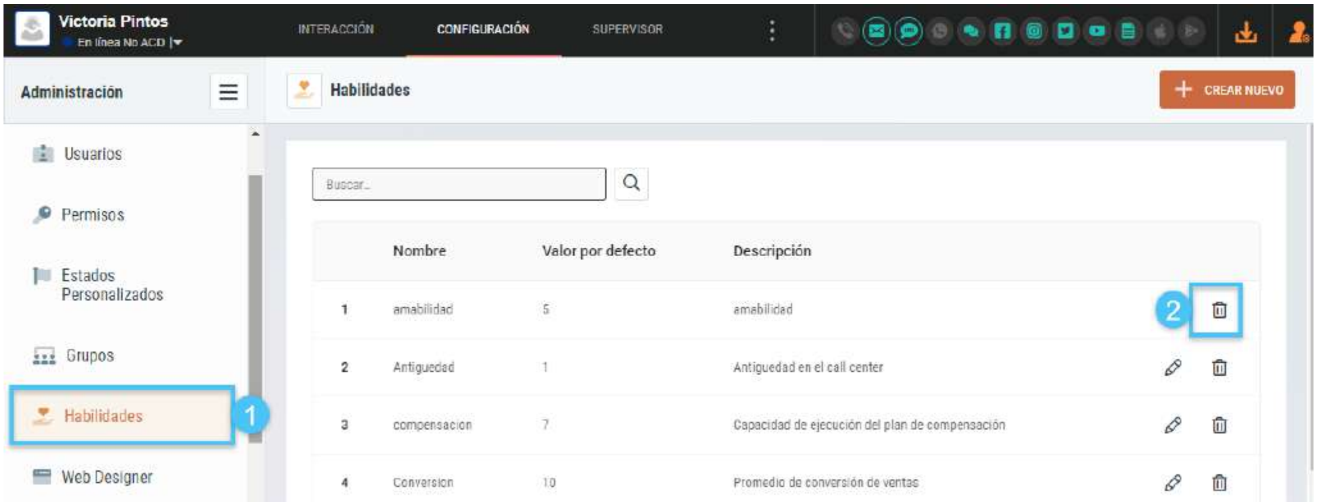
If you want to delete a skill from the system, you can do so. Bear in mind that you must first disassociate it from any users with whom it has been associated, otherwise it cannot be deleted.

To delete a skill:

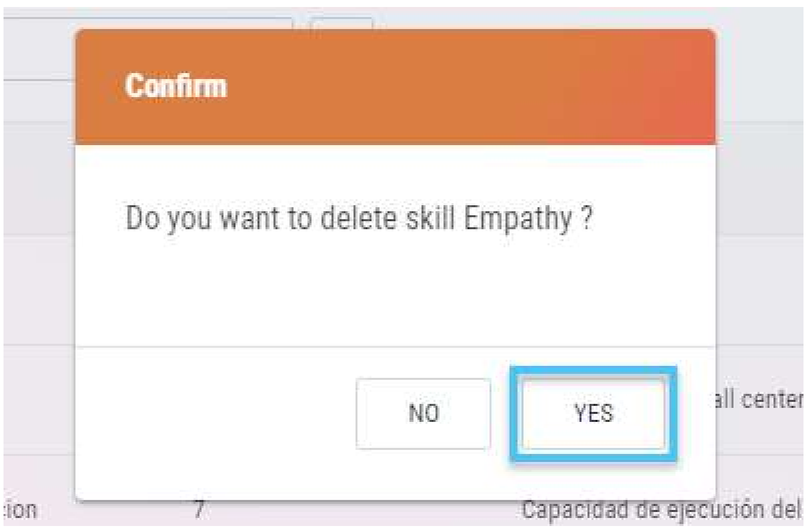
1. Go to the "Configuration" tab:



2. Click on the "Skills" section 1 and then click the "Delete" button for the skill 2 :

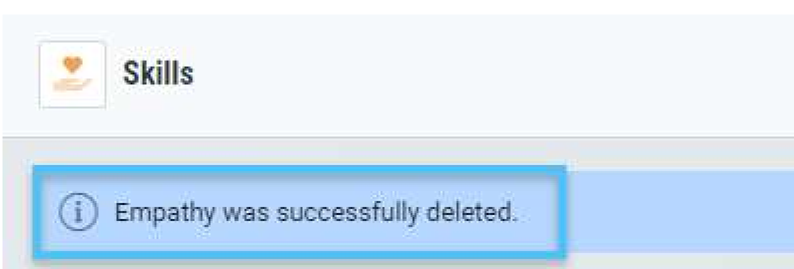


3. Click the "Yes" button to confirm deletion of the skill:



⚠ Note that to delete the skill, you must first disassociate it from any users with whom it has been associated.

4. A message confirming successful deletion of the skill is displayed:



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Web Designer

- What is Web Designer?

What is Web Designer?

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Tickets

- What is ticket management and how does it work?
- How to create a ticket issuer
- How to edit a ticket issuer
- How to delete a ticket issuer

What is ticket management and how does it work?

Ticket management allows an interaction to be converted into a ticket automatically or on demand.

For this, a ticket issuer must be created, designing the ticket number format using the system’s settings and associating it with an account. See "How to enable an account's ticket management feature".

Ticket management allows an interaction to be converted into a ticket automatically or on demand.

For this, a ticket issuer must be created, designing the ticket number format using the system’s settings and associating it with an account. See "How to enable an account's ticket management feature".

To create a ticket issuer, see "How to create a ticket issuer".

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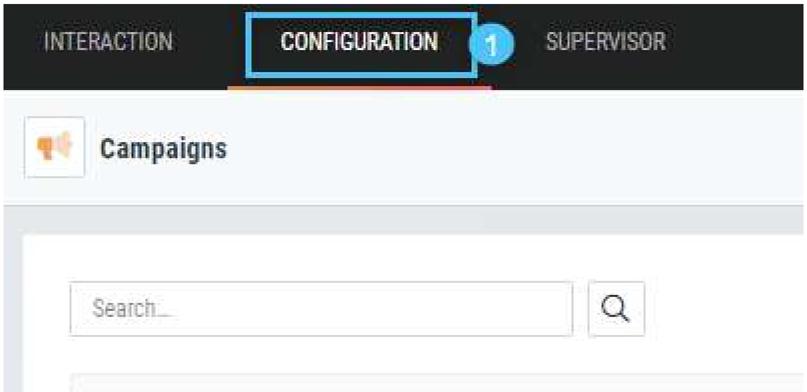
How to create a ticket issuer

The first step to be able to convert an interaction into a ticket, whether automatically or on demand, is to create the ticket issuer. You can define the number format for your tickets using the system’s settings.

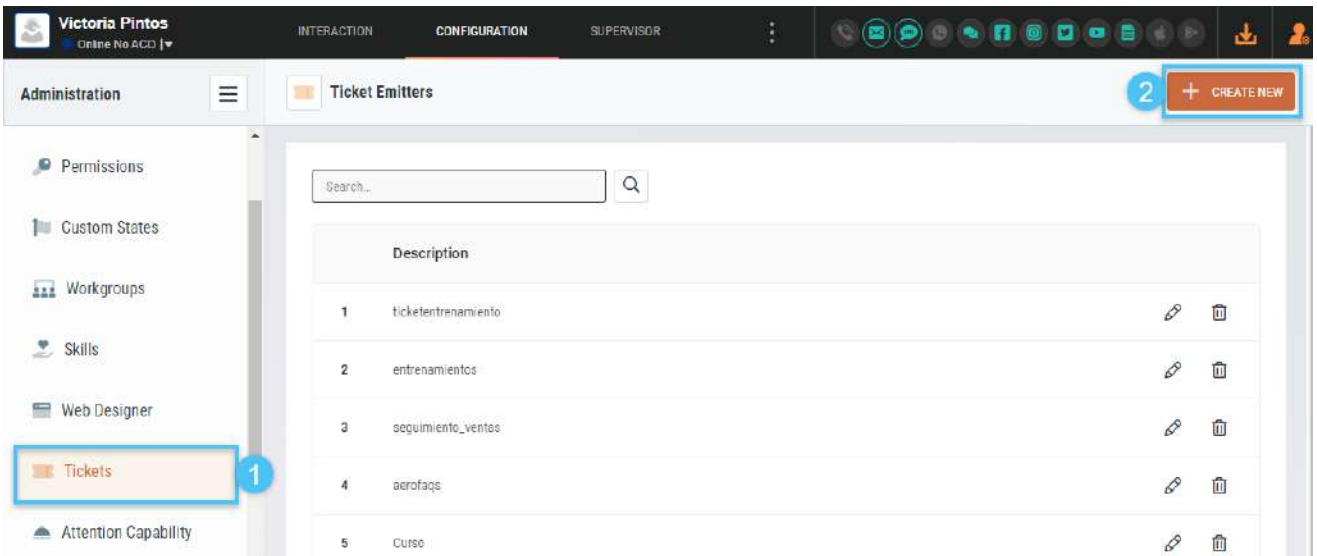
After creating the issuer, you will be able to enable ticket management in each of the communication channel accounts. For information on how to enable it, see "How to enable an account's ticket management feature".

To create a ticket issuer:

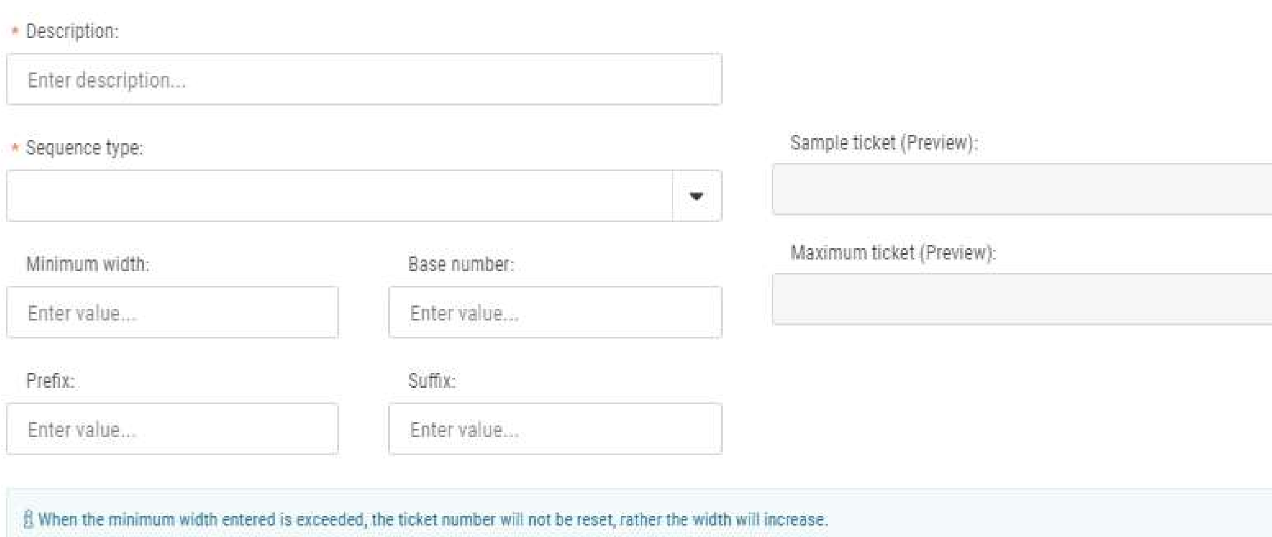
1. Go to the ***"Configuration"*** tab:



2. Click on the *"Tickets"* section and then click the ***"NEW EMITTER"*** button:



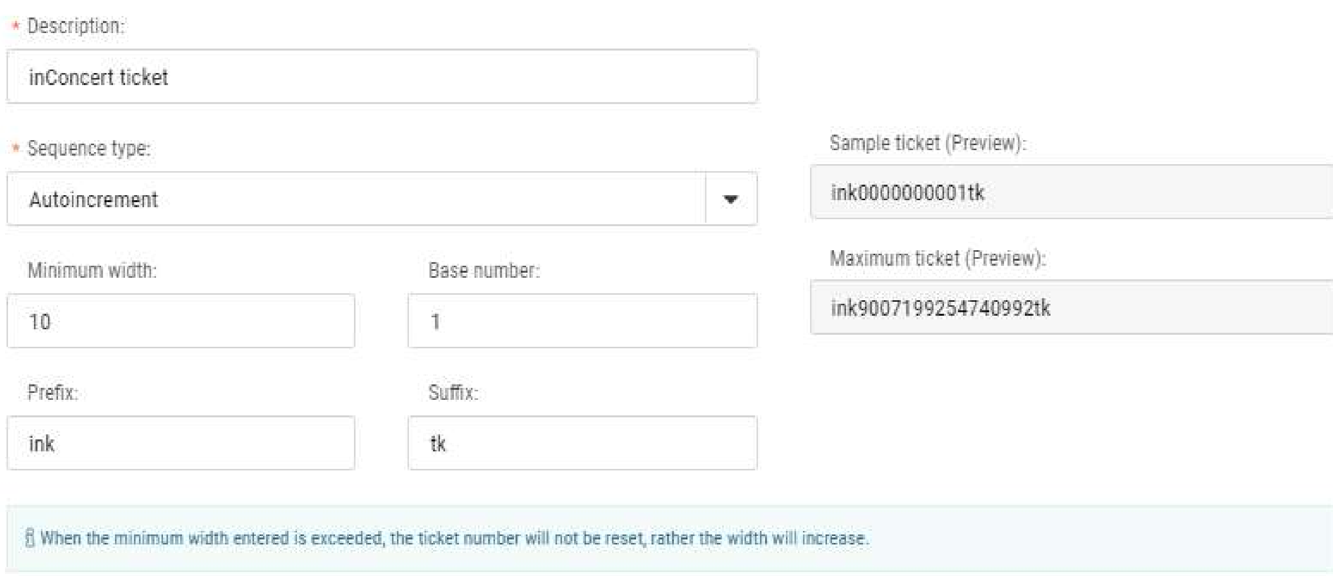
3. Enter the required data:



a. **General information:**

> **Description**: description of the ticket issuer.
>
> **Number Type**: ticket number format. The options are: *Auto-increment and Date with auto-increment.*
>
> **Minimum Width:** defines the numerical length of the ticket.
>
> **Base Number**: sets the number from which ticket numbering begins.
>
> **Prefix**: sets an identifier prefix for the ticket.
>
> **Suffix**: sets an identifier suffix for the ticket.
>
> Selecting any of these settings will display a preview of an example ticket.

4. Ticket example:



1. After filling out all the required fields, click the ***"CREATE"*** button to create the ticket issuer.
2. To save the new ticket issuer and create another one, click the ***"CREATE & CONTINUE"*** button.
3. To cancel the operation without saving the data entered, click the ***"CANCEL ACCOUNT"*** button.

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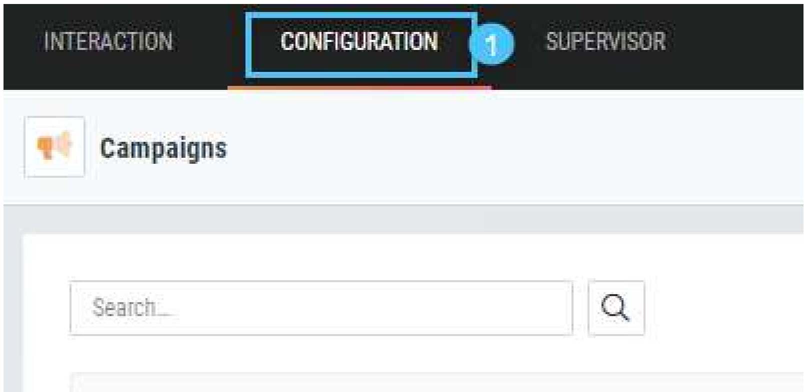
How to edit a ticket issuer

When editing a ticket issuer, any of its fields can be modified. Bear in mind that when making any changes, these will automatically also be applied to accounts already associated with that issuer.

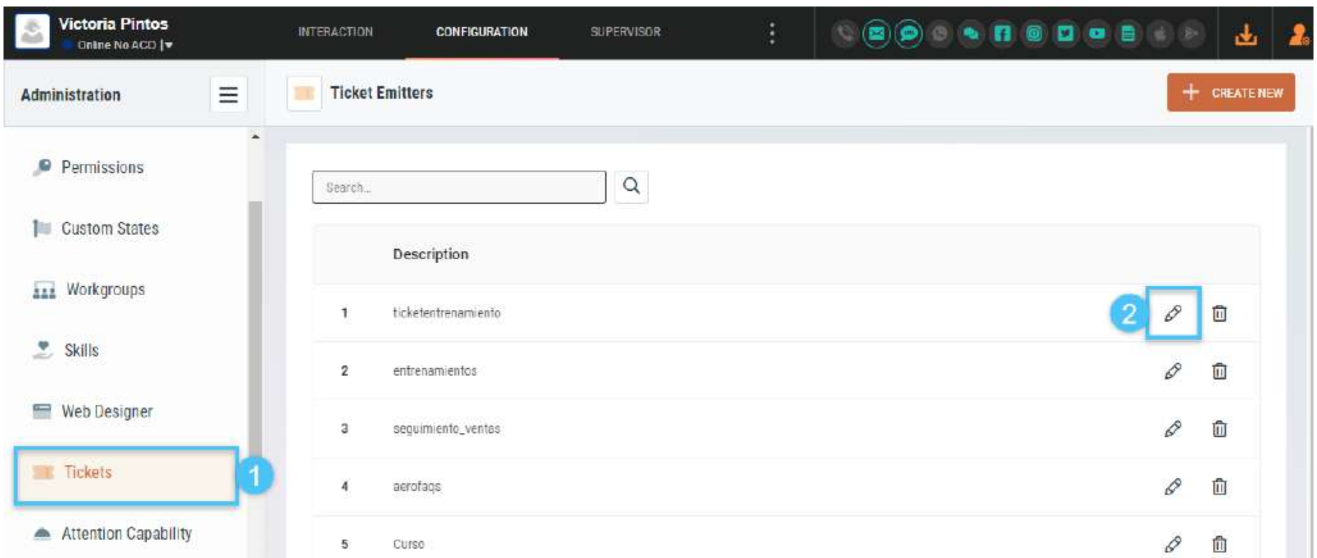
To learn how to enable ticket management for an account, see "How to enable an account's ticket management feature".

To edit a ticket issuer:

1. Go to the "Configuration" tab:



2. Click on the "Tickets" section and then click the "Edit" button for the issuer:



For information on the ticket issuer fields, see "How to create a ticket issuer".

1. After editing, click the "EDIT" button to save the changes to the ticket issuer.
2. To cancel the operation without saving any changes, click the "CANCEL" button.

> For information on the ticket issuer fields, see "How to create a ticket issuer".

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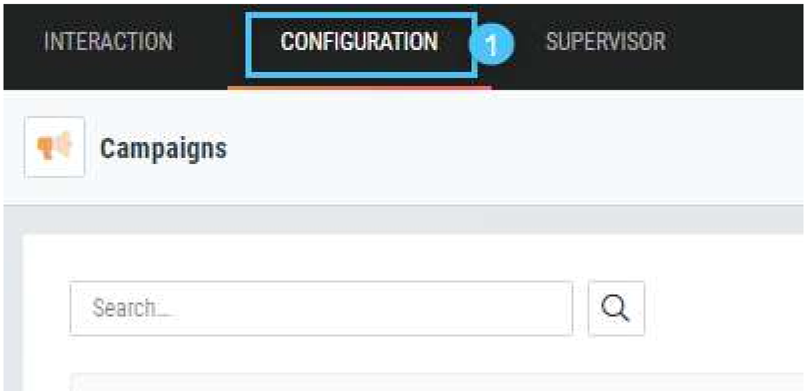
How to delete a ticket issuer

If you wish to delete a ticket issuer from the system, you can, but bear in mind that to do so, you must first disable it for the accounts for which it has been enabled, otherwise it cannot be deleted. For information on how to enable/disable it, see "How to enable an account's Ticket Management feature".

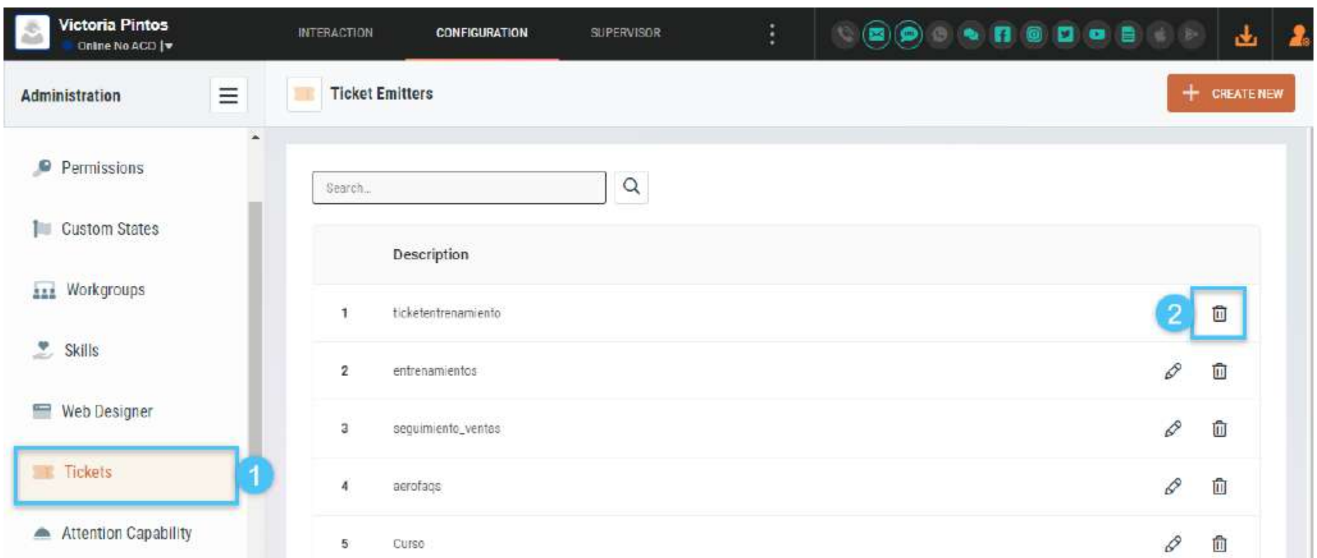
Tickets for interactions that have been generated by the deleted issuer not be lost.

To delete a ticket issuer:

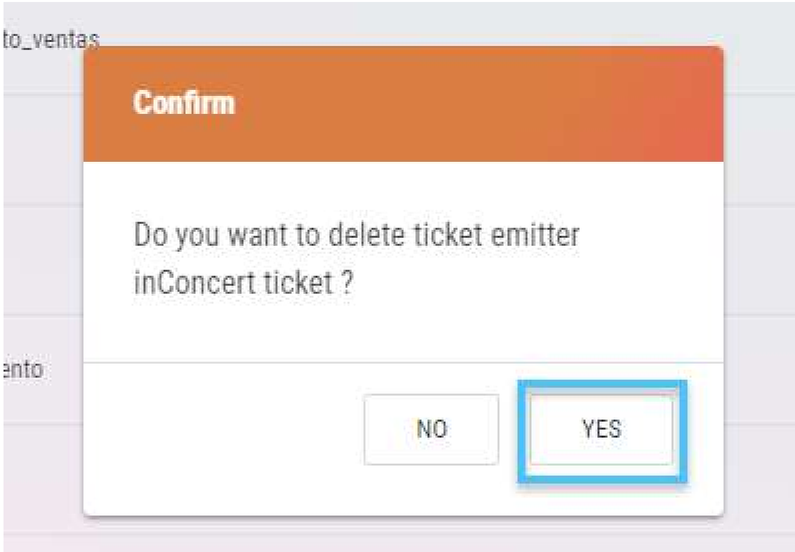
1. Go to the ***"Configuration"*** tab:



2. Click on the ***"Tickets"*** section and then click the ***"Delete"*** button for the ticket issuer:



3. Click the ***"Yes"*** button to confirm deletion of the issuer:



4. A message confirming successful deletion of the ticket issuer is displayed:

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Attention Capabilities

- What are attention capabilities?
- How to edit attention capabilities

What are attention capabilities?

You can limit the number of simultaneous interactions a user can keep active on each of the channels.

> For example, you can limit the number of Twitter, Facebook or email interactions that the user can keep unfinished, specifying the amounts that are deemed convenient for the operation of the Contact Center.

This limitation is done by editing attention capabilities. For information on how to edit attention capabilities, see "How to edit attention capabilities".

Related Articles

Content by label

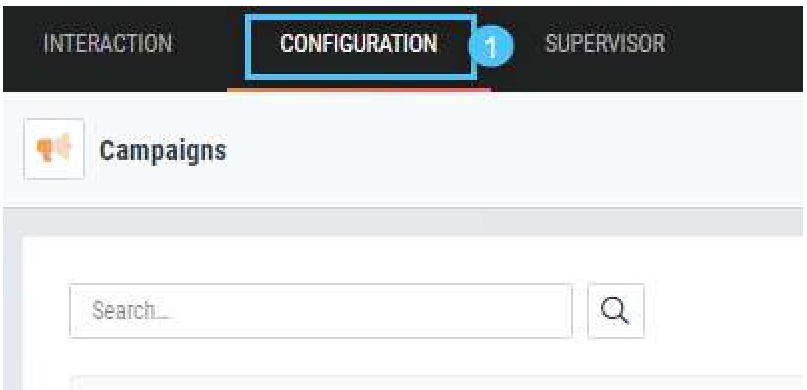
There is no content with the specified labels

How to edit attention capabilities

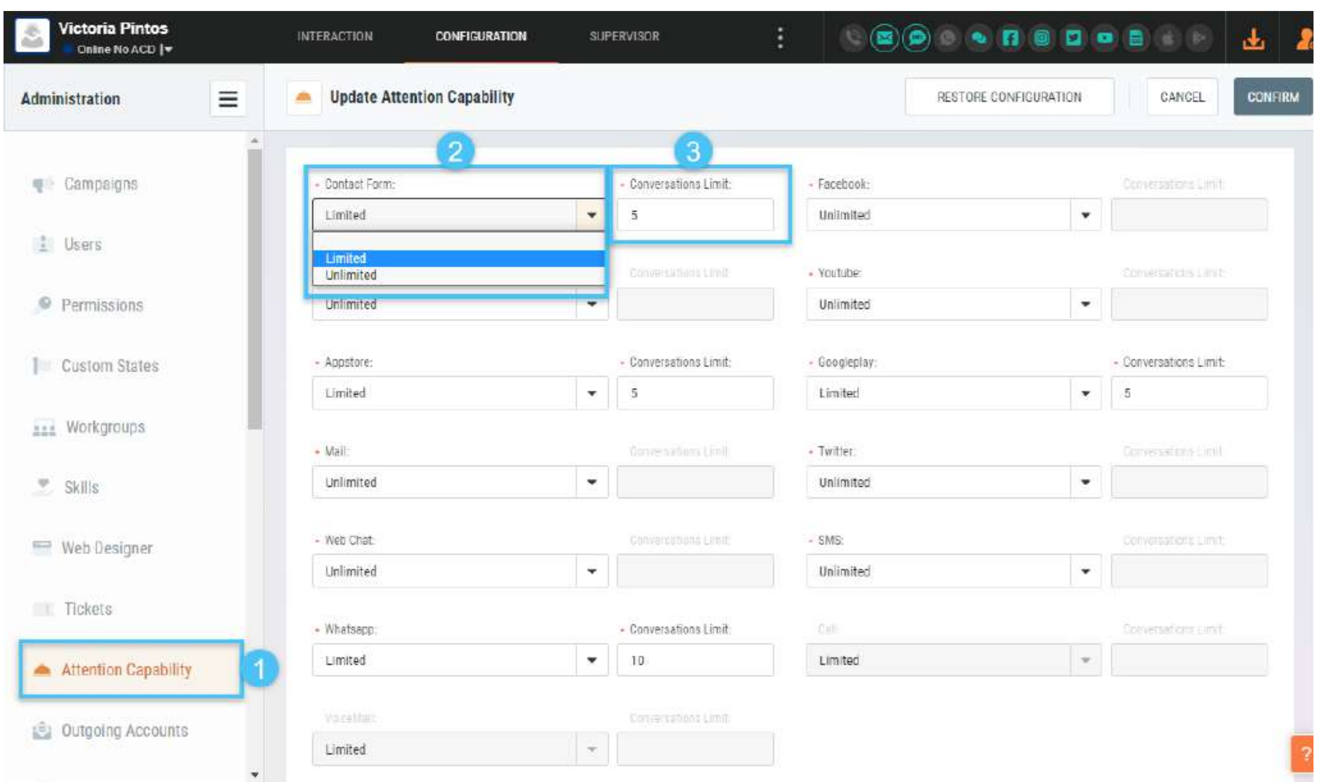
You can edit attention capabilities and thus limit the number of simultaneous interactions that an agent of your VCC can handle according to your best judgment.

To edit attention capabilities:

1. Go to the **"Configuration"** tab:



2. Click on the **"Attention Capability"** section, select whether or not to limit the interactions of the communication channel that the user will be able to handle simultaneously and, if you do limit them, set the limit:



In this case, it means that the user will be able to simultaneously handle 5 Contact Form interactions.

If the user is handling 5 interactions simultaneously, they must end, transfer or re-queue at least one of the interactions to be able to take on a new one.

1. After filling out all the fields required, click the **"EDIT"** button to save the changes.
2. To cancel the operation without saving the data entered, click the **"RESTORE"** button.

The changes made will apply to all accounts related to the type of interactions that were modified. Should you wish to apply any Attention Capability setting to a particular account, it must be modified from the **"Channels"** section of the account. For information on how to do this, see "How to edit a Channel's general setup".

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Outgoing Account

- What are outgoing accounts used for?
- How to create an outgoing account
- How to edit an outgoing account
- How to delete an outgoing account

What are outgoing accounts used for?

Outgoing email accounts are used to send automatic reports, completion messages and chat transcripts.

For information on how to create an outgoing account, see "How to create an outgoing account".

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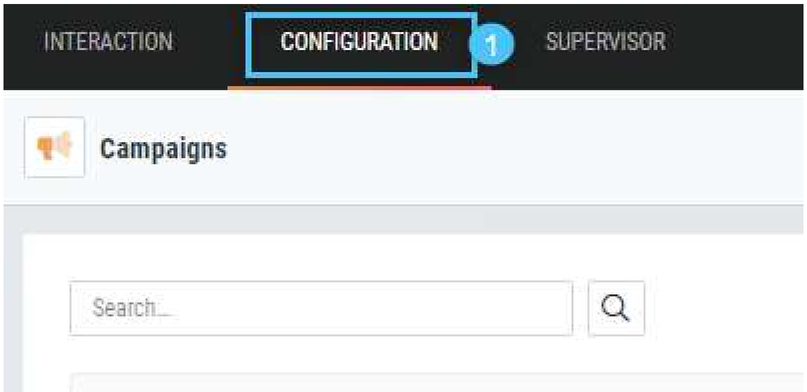
- How to associate an application from Google Play Store
- How to associate an application from the App Store
- How to create a Call account

How to create an outgoing account

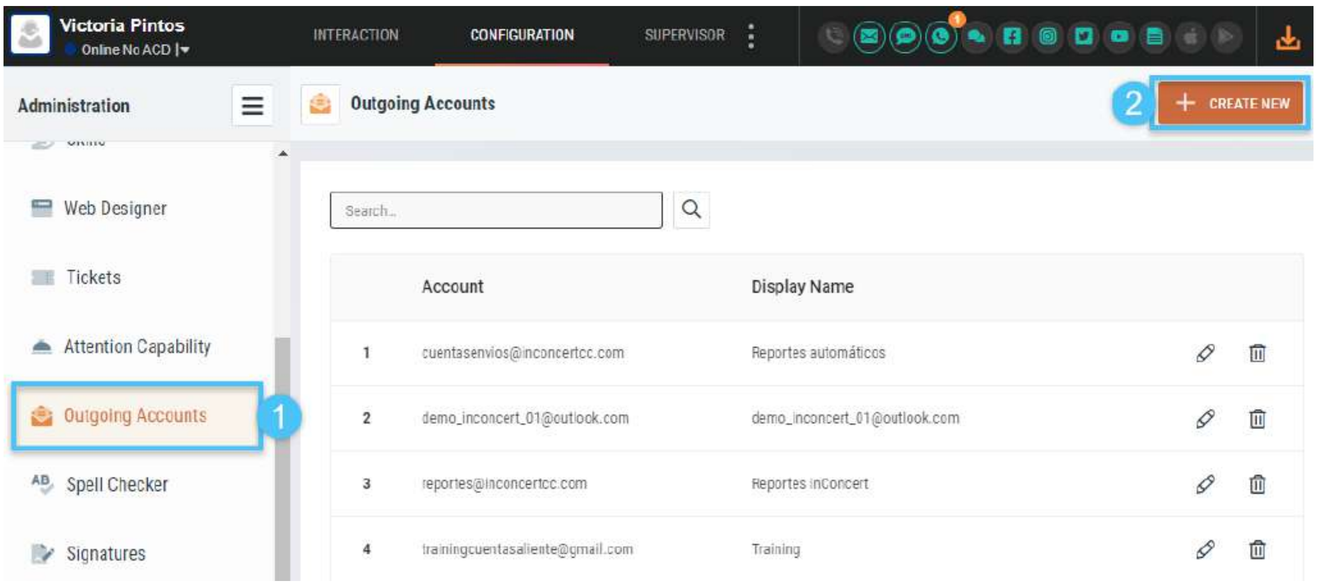
Creating an outgoing account allows you to set up an email account for automatically sending reports, completion messages and chat transcripts.

To create an outgoing account:

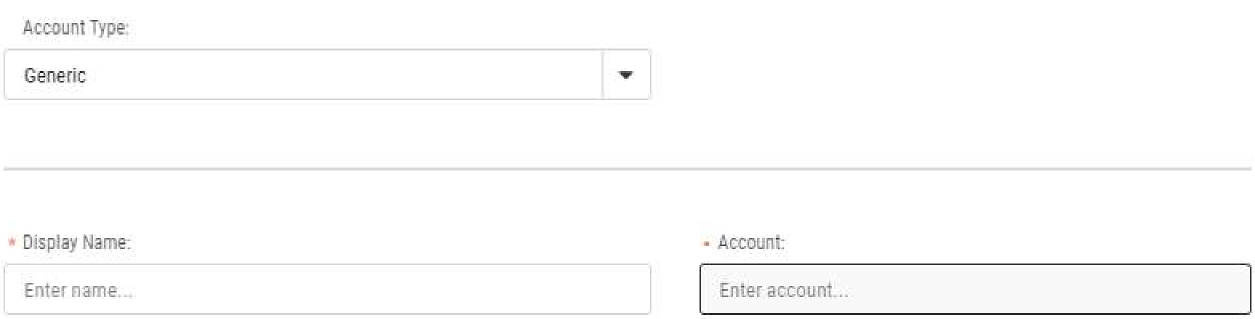
1. Go to the **"Configuration"** tab:



2. Click on the "Outgoing Accounts" section and then click the **"NEW ACCOUNT"** button:



3. Enter the required data:
   a. **General information:**

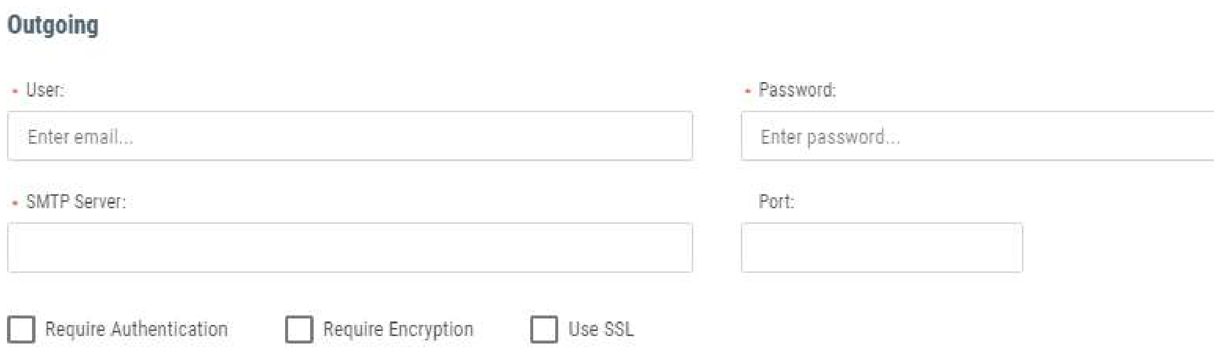


Account type: type of email account to set up. The options are: *Gmail, Outlook, Yahoo or others.* Should you select Gmail, Outlook or Yahoo, several of the required fields below are filled out automatically.

Account: email account to configure.

Display name: account name to be shown.

b. **Server configuration for the outgoing account:**



> The fields required to configure an outgoing mail server must be specified.

1. After filling out all the fields required, click the **"CREATE"** button to finish setting up the account.
2. To save the new account and configure another one, click the **"CREATE & CONTINUE"** button.
3. To cancel the operation without saving the entered data, click the **"CANCEL"** button.

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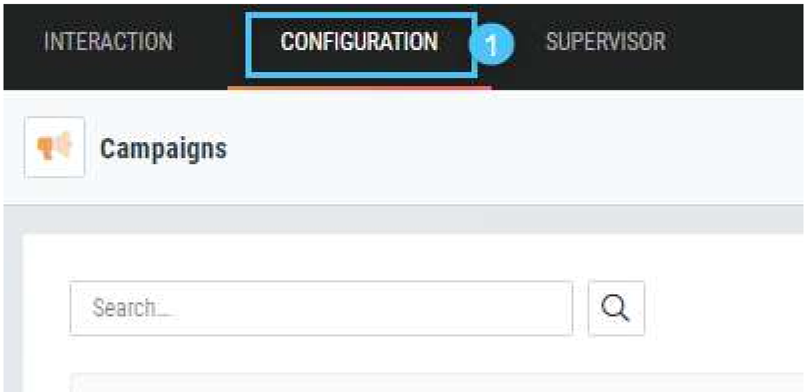
How to edit an outgoing account

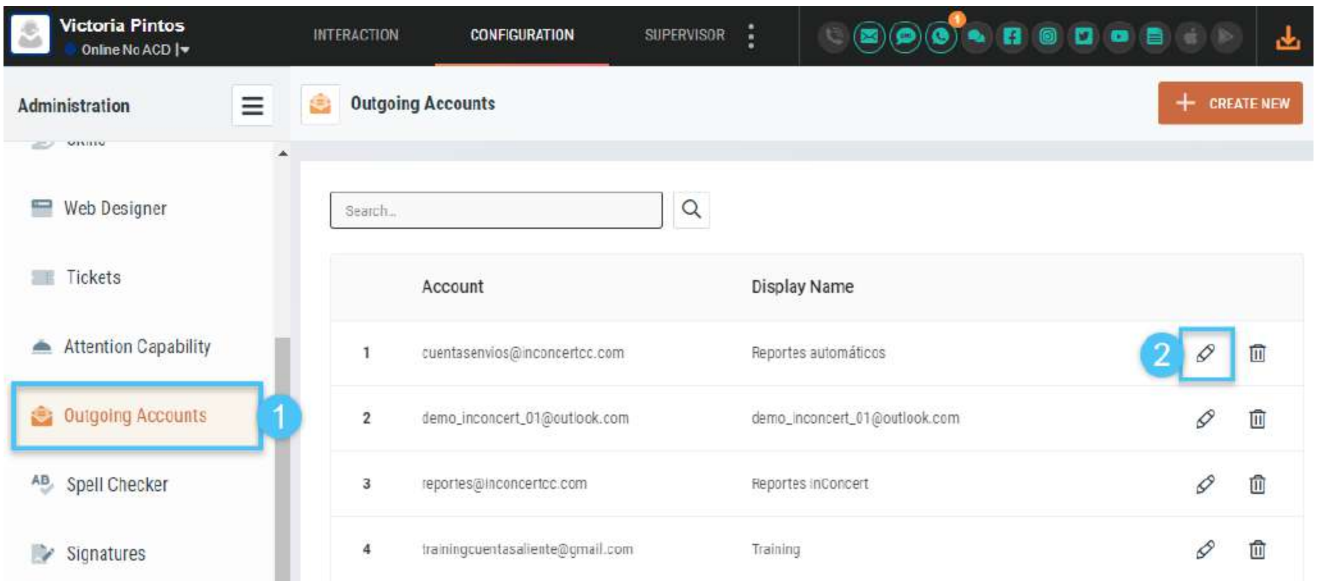
You can edit an outgoing account to change the account's display name or certain parameters in the outgoing account's server configuration. The configured email account cannot be edited.

To edit an outgoing account:

1. Go to the **"Configuration"** tab:



2. Click on the "Outgoing Accounts" section and then click the **"Edit"** button for the outgoing account:



For information on the outgoing account fields, see "How to create an outgoing account".

The email account cannot be edited.

1. After editing, click the **"EDIT"** button to save the changes to the outgoing account.
2. To cancel the operation without saving any changes, click the **"CANCEL"** button.

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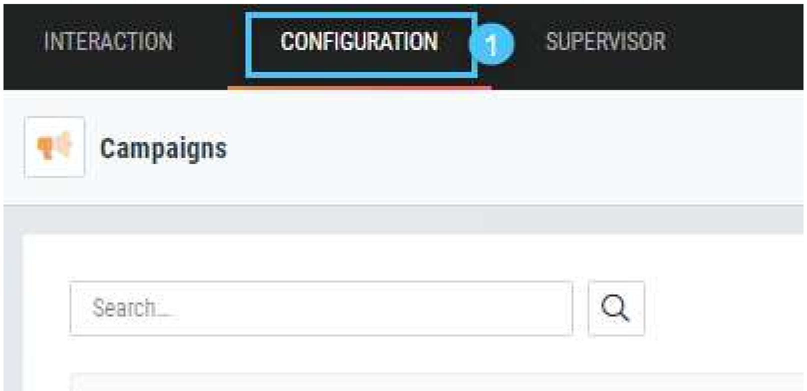
How to delete an outgoing account

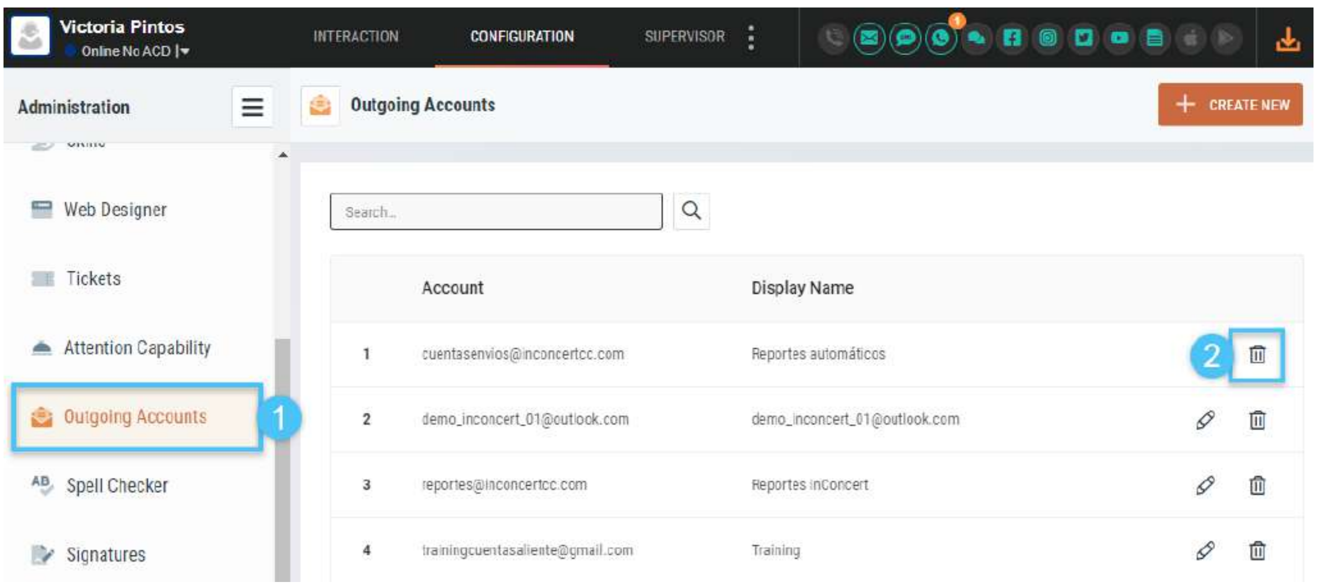
If you wish to delete an outgoing account, you can, but bear in mind that it might be in use for sending automatic reports, completion messages and chat transcripts. You should therefore make sure that users can use another outgoing account for such purposes.

To delete an outgoing account:

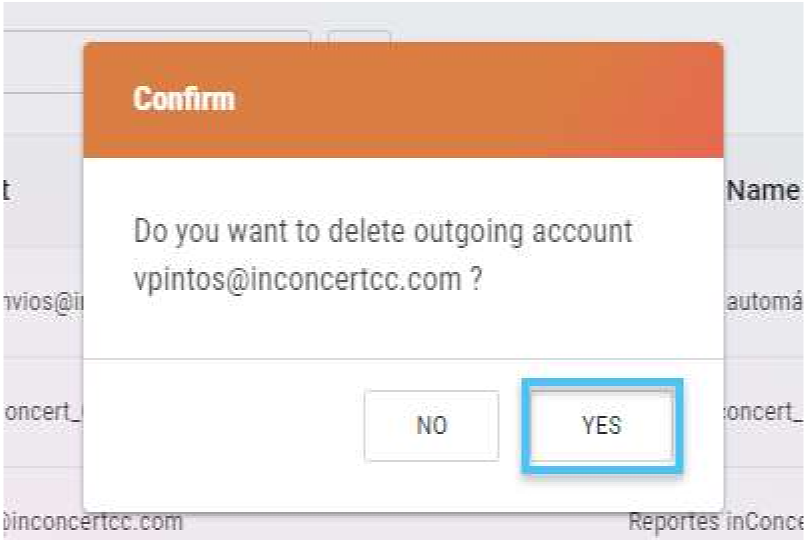
1. Go to the **"Configuration"** tab:



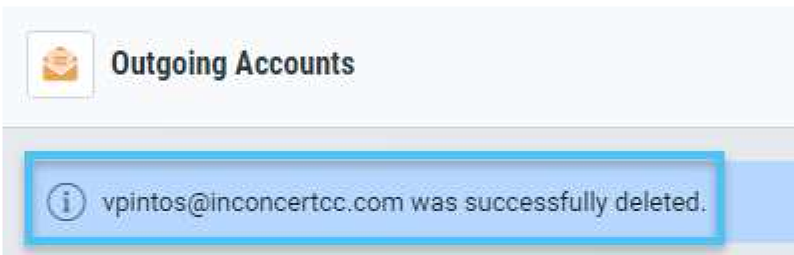
2. Click on the **"Outgoing Accounts"** sectionand then click the **"Delete"** button for the outgoing account:



3. Click the **"Yes"** button to confirm deletion of the outgoing account:



4. A message confirming successful deletion of the outgoing account is displayed:



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Spell Checker

- What is the Spell Checker?
- How to add words to the system's spell checkers

What is the Spell Checker?

The system's Spell Checker allows agents to correct an unknown word when handling interactions because it has been misspelled, or even because it is a word whose meaning is company-specific

To learn how to add words to the Spell Checker, see "How to add words to the system's spell checkers"

The system's Spell Checker works with 4 languages: *English, French, Portuguese and Spanish.*

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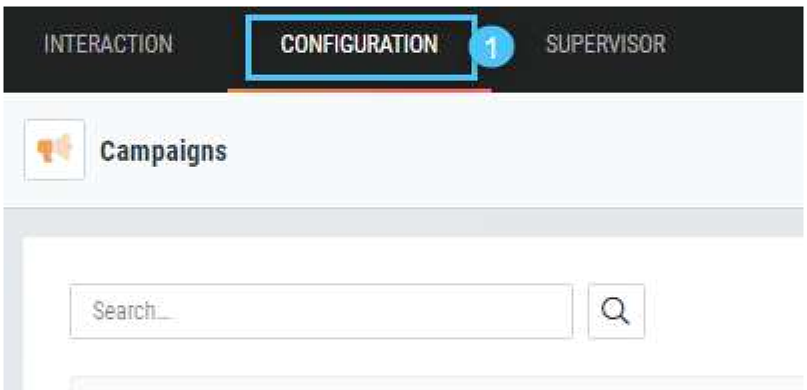
How to add words to the system's spell checkers

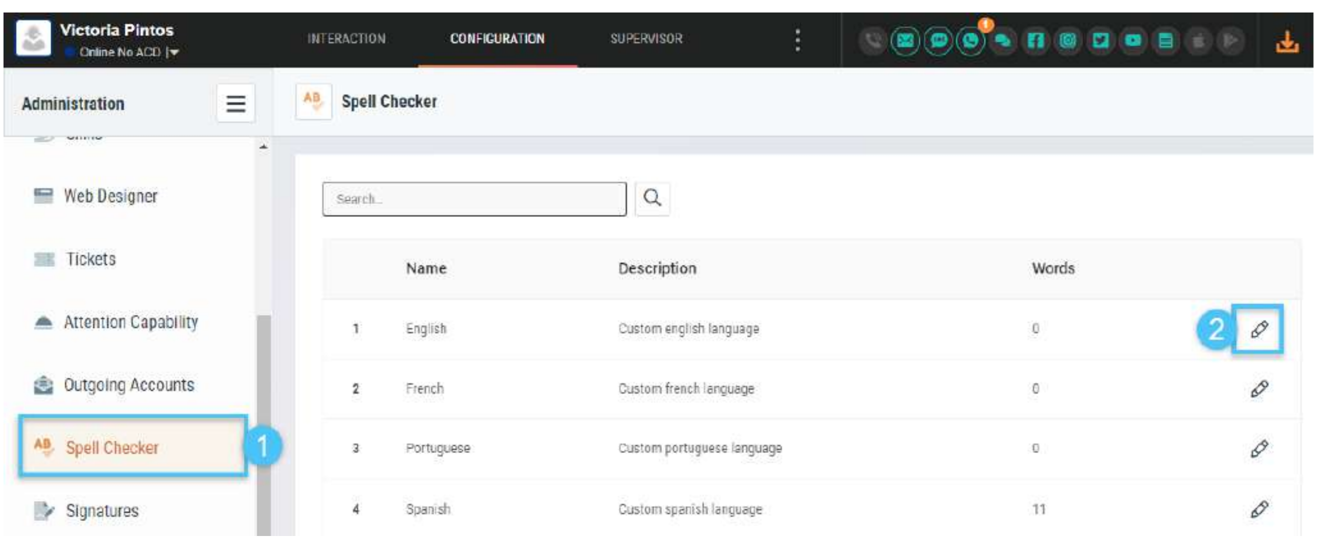
By default, the Spell Checker has an endless number of default words to enable operators to correct the text of their messages when handling interactions. Even so, you can add more words to the spell checker according to need and convenience.

To add words to the system's Spell Checker:

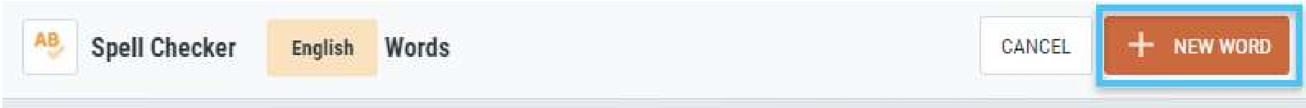
1. Go to the "Configuration" tab:



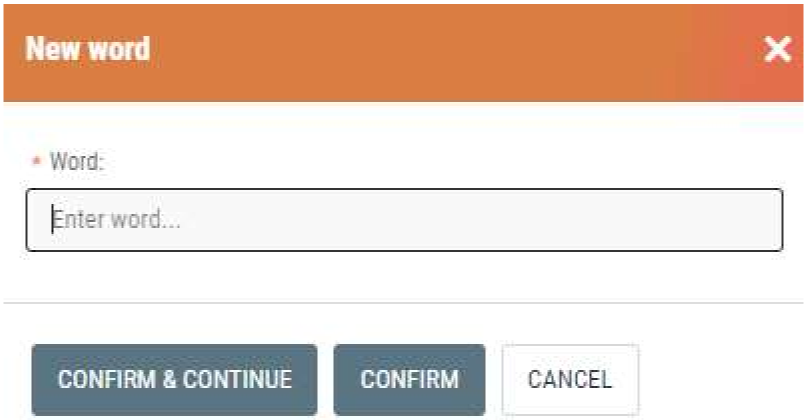
2. Click on the "Spell Checker"  section and then click the "Edit" button for the language of the spell checker to which you wish to add words  :



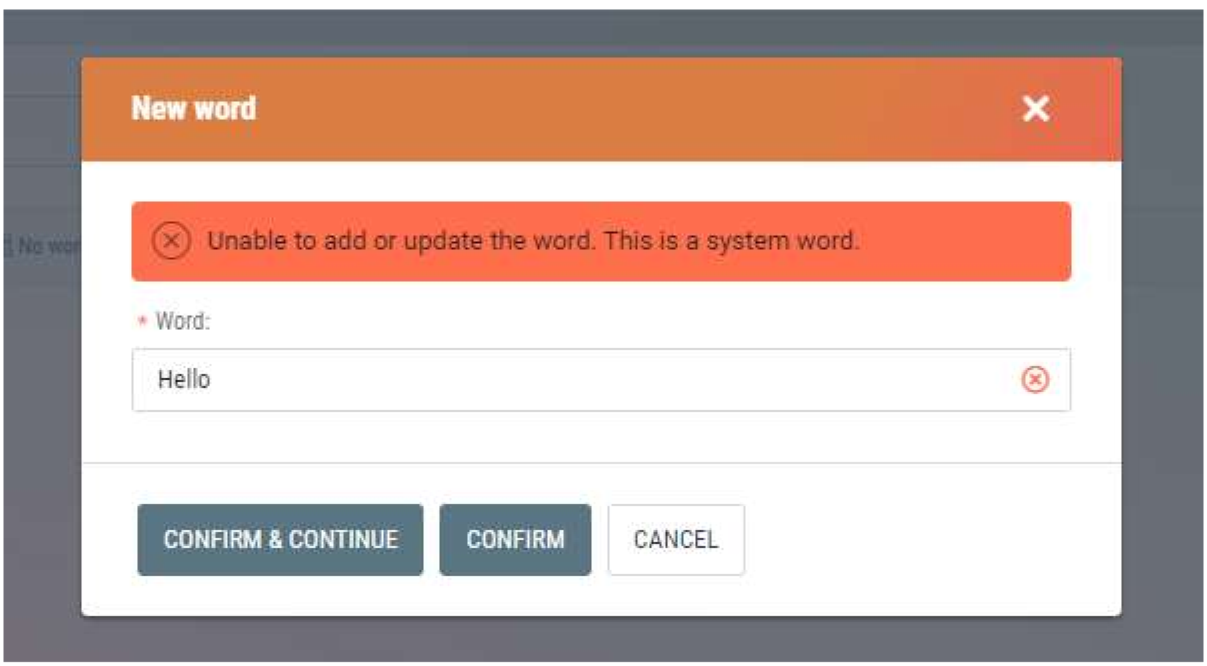
3. Click the "NEW WORD" button":



4. Enter the word to add:



5. After typing the word, click the "CREATE" button to add it.
6. To save the new word and add another one, click the "CREATE & CONTINUE" button.
7. To cancel the operation without saving the word entered, click the "CANCEL" button.
8. If you try to add a word that is already in the Spell Checker by default, the following error message will appear:



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Signature

- What are signatures and when are they used?
- How to set up a new signature
- How to edit a signature
- How to delete a signature

What are signatures and when are they used?

It is very important to set up a personalized signature for emails, since within it you can include company data, contact details or any important data that may interest the recipient.

Once the signature has been set up, it can be used in any email account that is associated with a campaign.

For information on how to set up a new signature, see "How to set up a new signature".

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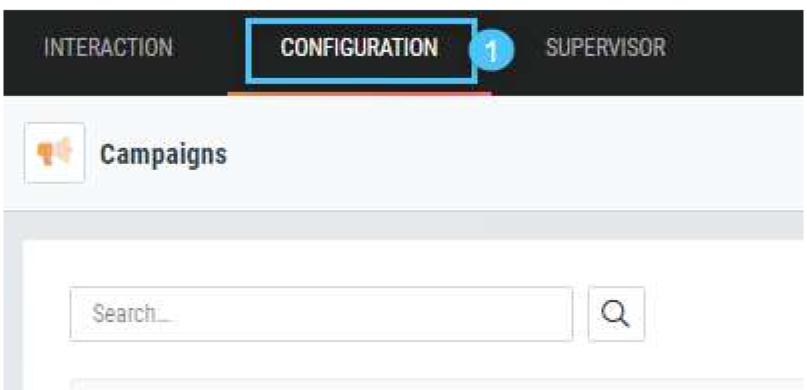
How to set up a new signature

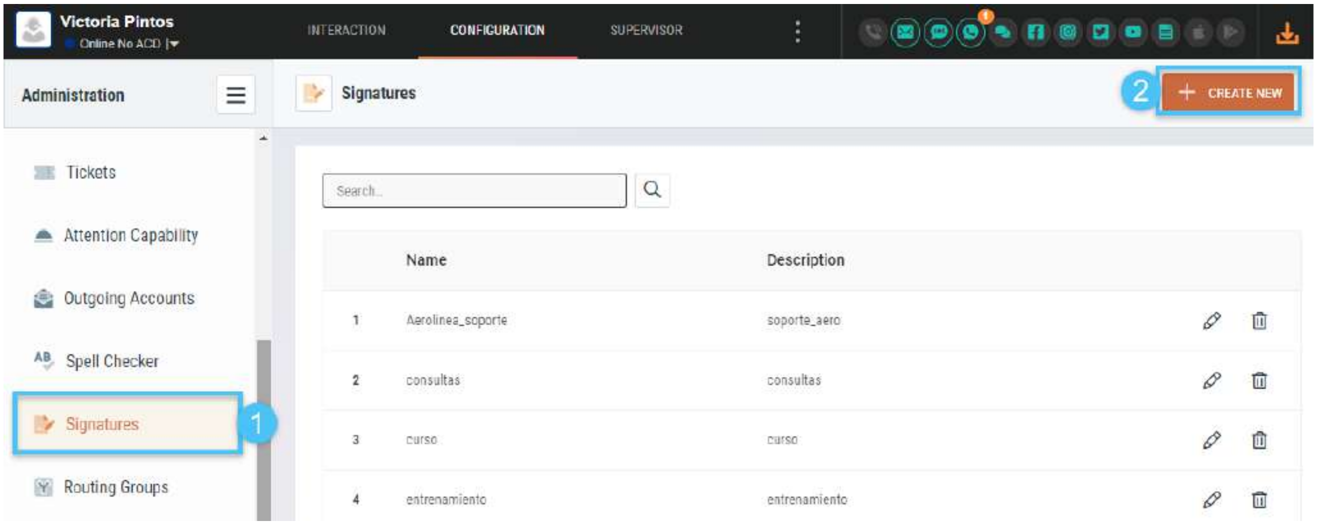
Once assigned to an email account, a signature will allow you to show data that you consider important and that may attract the attention of the recipient.

To set up a new signature:

1. Go to the "Configuration" tab:



2. Click on the "Signatures" sectionand then click the "NEW SIGNATURE" button:

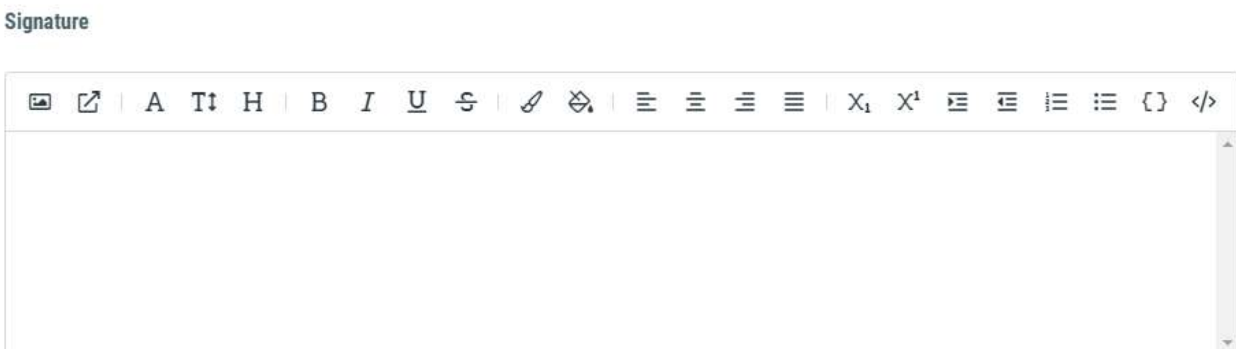


3. Enter the required data:
   a. **General information:**

Name: name that will identify the signature in the system. The signature is configured in the email account associated with a campaign through its name. For information on how to do this, see "How to associate a Mail account".

Description: description of the signature.

b. Signature:
There is a set of options in the format bar that you can use to design your signature block:



The options include: insert images; insert links; choose font type, style, colors and size; margin layout; add subscripts and superscripts; add indents; list; work with system variables and see your signature in HTML code. *If you place the cursor over any of the options, the relevant description appears.*

1. After filling out all the fields required, click the "CREATE" button to create your signature.
2. To cancel the operation without saving the entered data, click the "CANCEL" button.

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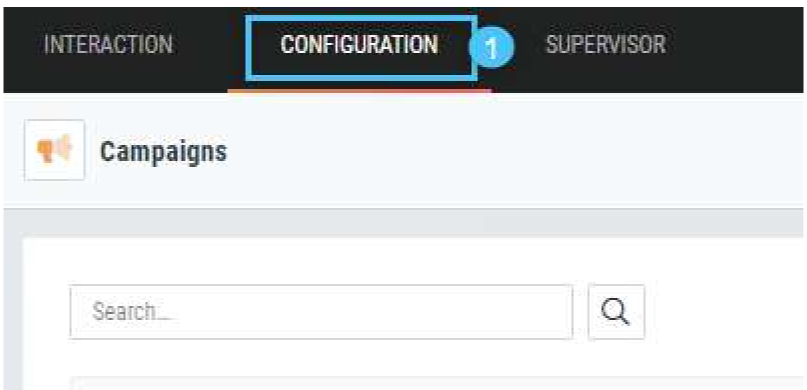
How to edit a signature

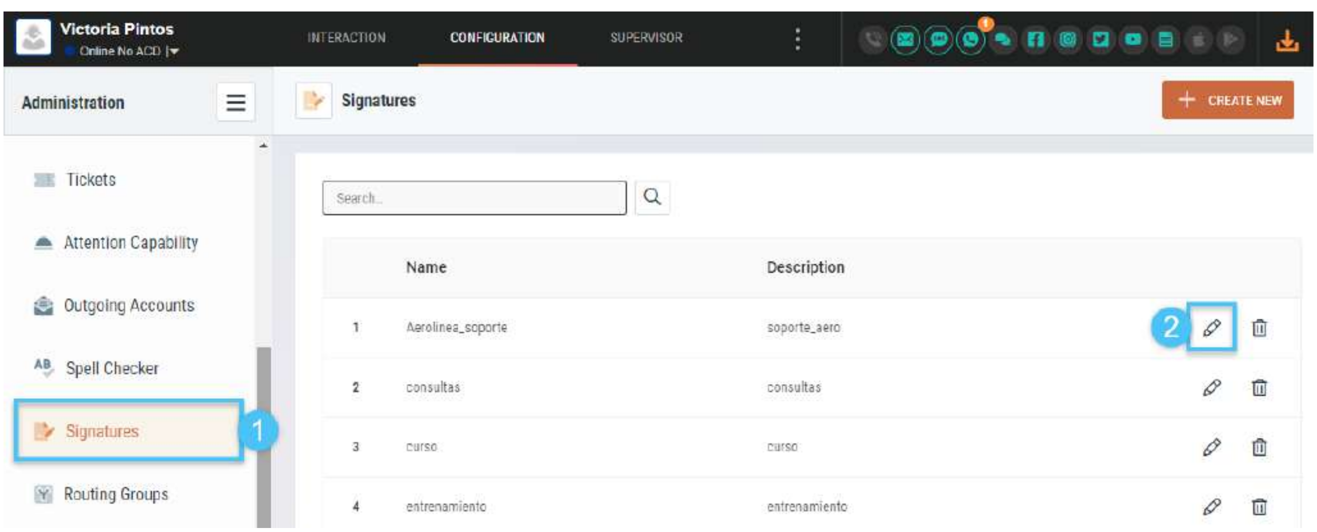
You can edit a signature to change any of the data it contains or to add more information that you consider important.

To edit a signature:

1. Go to the **"Configuration"** tab:



2. Click on the **"Signatures"** sectionand then click the **"Edit"** button of the signature to be edited:



For information on a signature's fields, see "How to set up a new signature".

1. After editing, click the **"EDIT"** button to save the changes to the signature.
2. To cancel the operation without saving any changes, click the **"CANCEL"** button.

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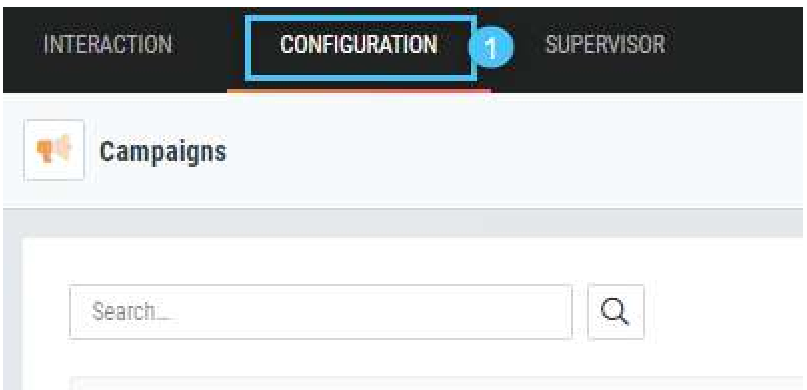
- How to associate an application from the App Store

How to delete a signature

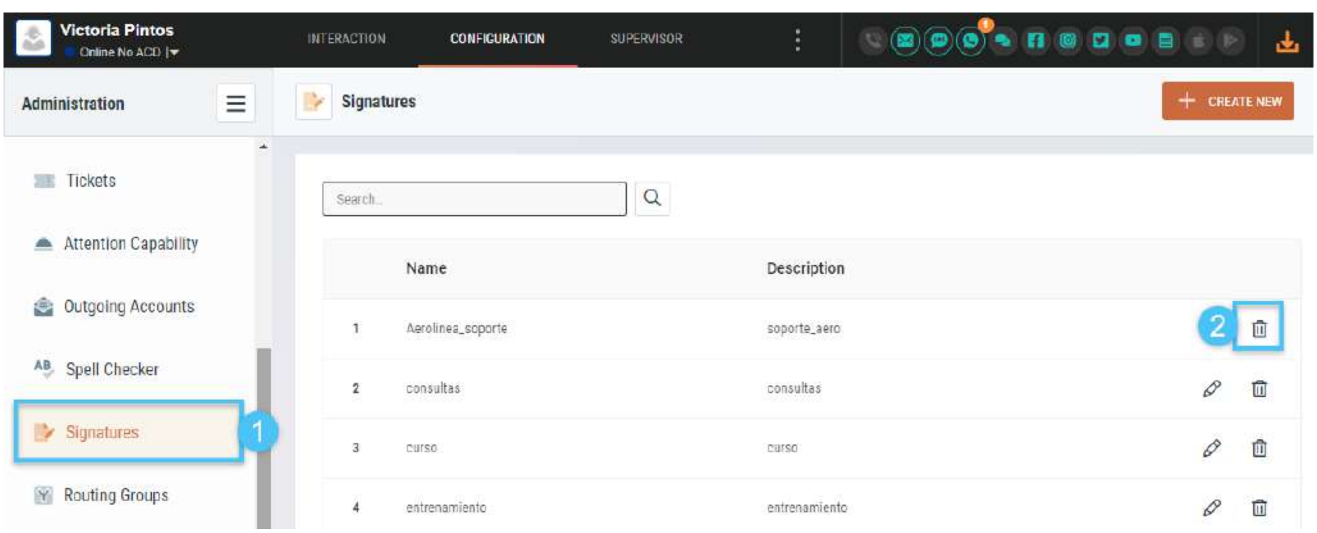
If you wish to delete a signature, you can, but bear in mind that it might be in use by an email account.

To delete a signature:

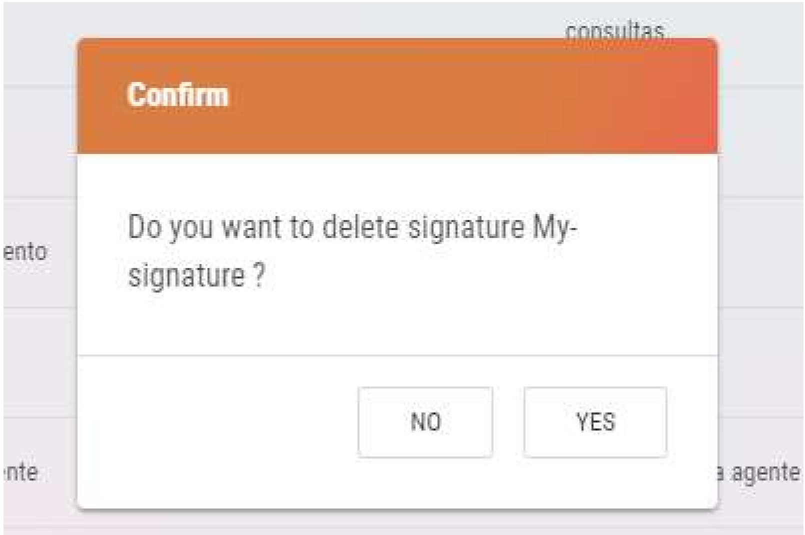
1. Go to the "**Configuration"** tab:



2. Click on the **"Signatures"** section and then click the **"Delete"** button of the signature to be deleted:

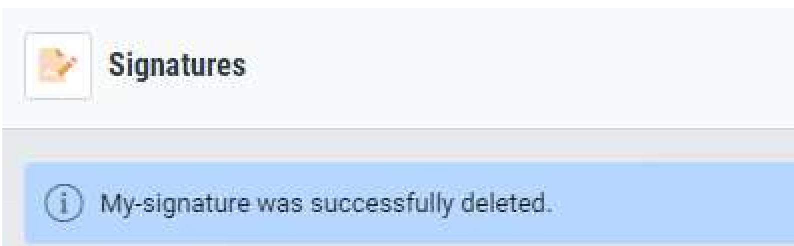


3. Click the **“Yes”** button to confirm deletion of the signature:



⚠ If the signature is associated with an email account, it will be disassociated from it on clicking the **“Yes”** button.

4. A message confirming successful deletion of the signature is displayed:



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Cognitive Services

- What is a Cognitive Service and what is it for?
- What is an intent?
- What is an entity?
- What is an utterance?
- What are Features Phrases?
- How to create a new Cognitive Service
- How to edit a Cognitive Service

- How to delete a Cognitive Service
- How to define a new intent
- How to edit an intent
- How to delete an intent
- How to define a new entity
- How to use prebuilt entities
- How to train an intent using utterances
- How to reassign utterances to intents
- How to remove utterances from an intent
- How to label (mark) entities within an utterance
- How to define a new Features Phrases
- How to publish training and settings in the cognitive app

What is a Cognitive Service and what is it for?

What is it?

A Cognitive Service is a collection of intelligent application programming interfaces or *APIs* (these allow communication between two programs) that transfer representational states, allowing systems to see, hear, speak, understand and interpret people's requirements using natural language.

What is it for?

It is used to add intelligent features to applications in a simple way. In other words, it is used to detect emotions and feelings, for voice and visual recognition, to search for knowledge and to understand human languages.

Related Articles

- How to publish training and settings in the cognitive app
- How to define a new Features Phrases
- How to label (mark) entities within an utterance
- How to reassign utterances to intents
- How to use prebuilt entities

What is an intent?

An intent represents a task or action the user wishes to perform. It is a purpose or goal expressed in a user's utterance.

In other words, intents are functions that must be run when a user types something.

Intents have a single name per *Cognitive Service*.

Example

Suppose you define the intent "*Call*". This intent will identify a function that must be run each time a user sends an utterance similar or equal to the utterances we associate with our intent:

- "I would like to *call* Carlos"
- "*Call* Carlos"
- "I would be interested in *calling* my friend Carlos"

To improve your understanding of this concept, see the following *Microsoft* article: Intents concepts in your LUIS app

Related Articles

- How to publish training and settings in the cognitive app
- How to define a new Features Phrases
- How to label (mark) entities within an utterance
- How to reassign utterances to intents
- How to use prebuilt entities

What is an entity?

Entities are words or phrases in utterances that are key data in the app domain.

In other words, *entities* are the minimum units of information; they are the data to be extracted from the utterance.

Example:

The utterance "Call Carlos at *7 pm*"

includes the time entity "*7 pm*". After analyzing the utterance, the *Cognitive Services* system will determine that the user wishes to perform an action, i.e., an intent which is to "*call Carlos*" and that it must be done at a specific time, "*7 pm*" (entity)

To improve your understanding of this concept, see the following Microsoft article: Entity types and their purposes in LUIS.

Related Articles

- How to publish training and settings in the cognitive app
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- How to reassign utterances to intents
- How to use prebuilt entities

What is an utterance?

Utterances are user-supplied data that the application must interpret. To train LUIS to extract intents and entities from them, it is important to capture several different example utterances for each intent. Active learning or the process of continuous training on new utterances is essential for the machine learning intelligence that LUIS provides.

In other words, utterances are what the user must submit to activate a particular intent.

- As utterances you should use phrases that the user might type to request a particular function, that is, a particular intent.
- Type the same thing but using different words and ways of requesting a particular function.
- Add examples that don't use correct grammar or punctuation to request that function.

To improve your understanding of this concept, see the following Microsoft article: Understand which are the correct utterances for the LUIS app.

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- How to publish training and settings in the cognitive app
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- How to label (mark) entities within an utterance
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- How to use prebuilt entities

What are Features Phrases?

Features are a list of words or phrases that are important for the app, much more so than other words in utterances. They are added to the app domain vocabulary as an additional hint for LUIS about those words. What LUIS learns about one of them is automatically applied to the rest. This list is not a closed list entity of exact text matches.

- Features are distinguishing traits or attributes of data that the system observes.
- They provide suggestions on how to recognize the input to be labeled.
- They help the Cognitive Service to recognize intents and entities. Features provide examples of related terms.

To improve your understanding of this concept, see the following Microsoft article: Phrase list features in the LUIS app.

Related Articles

- How to publish training and settings in the cognitive app

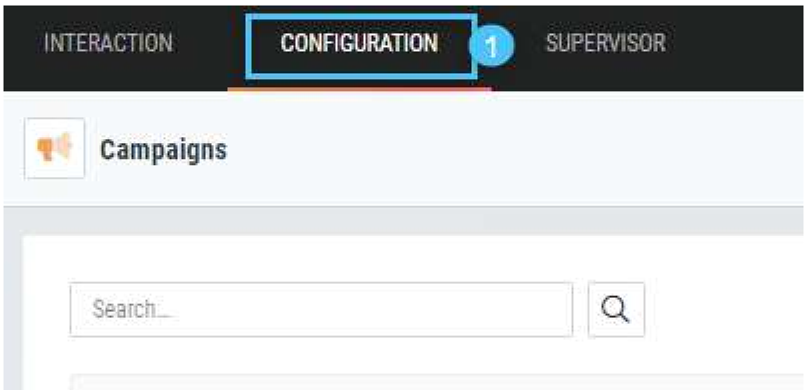
- [How to define a new Features Phrases]
- [How to label (mark) entities within an utterance]
- [How to reassign utterances to intents]
- [How to use prebuilt entities]

How to create a new Cognitive Service

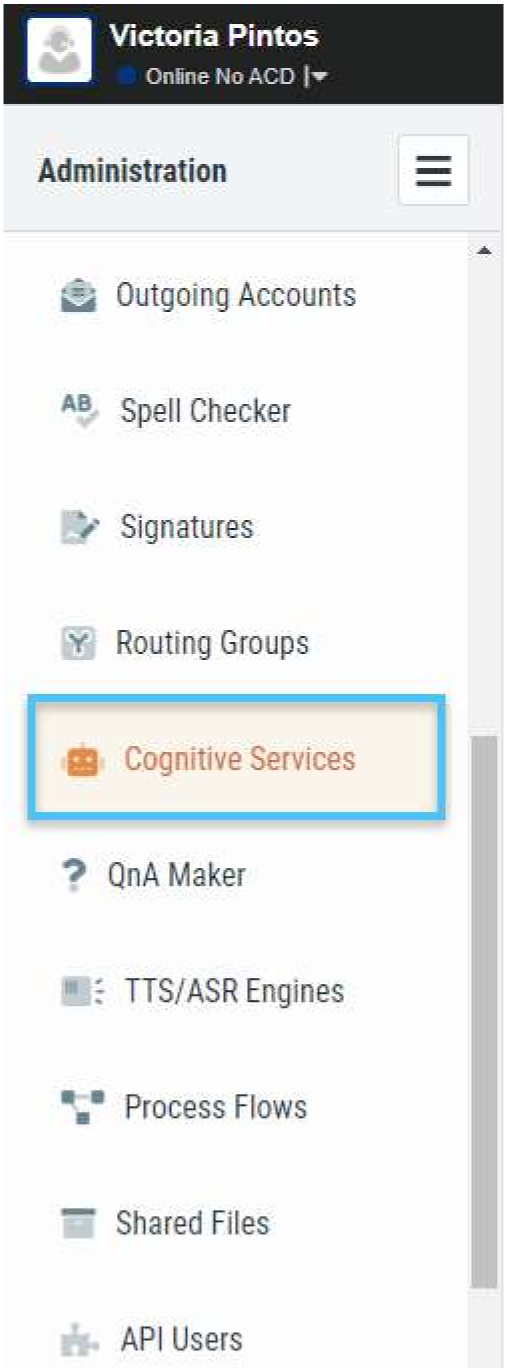
In the following article you will learn how to create a new Cognitive Service in inConcert Omnichannel.

To create a new Cognitive Service:

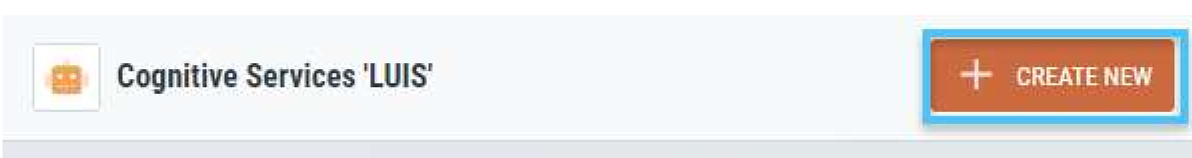
1. Go to the "*Configuration*" tab



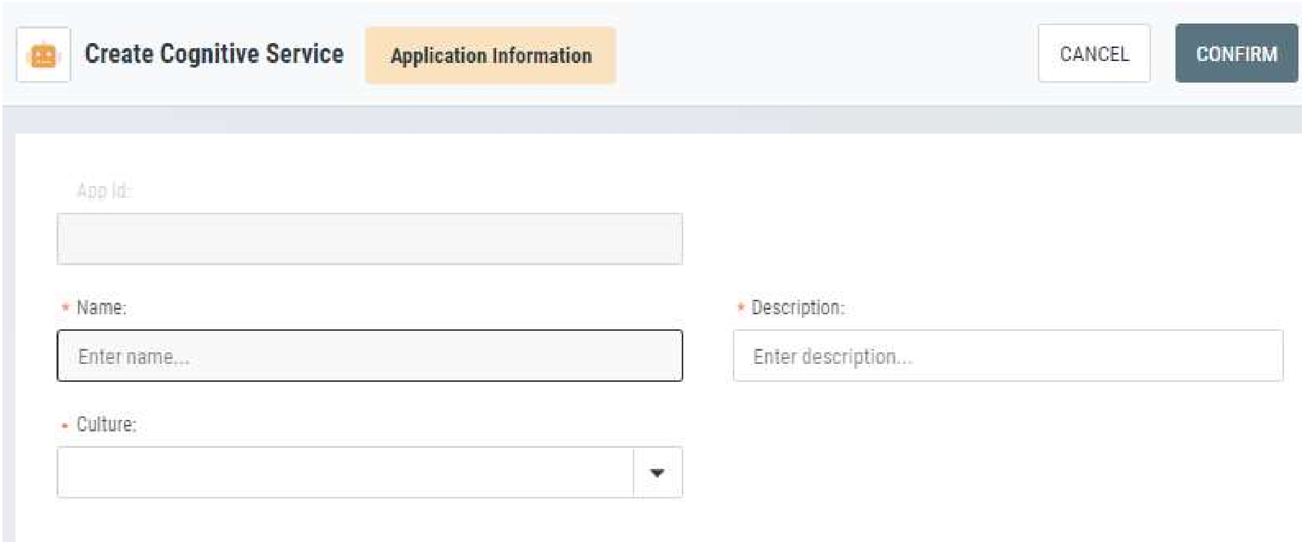
2. In the administration panel, look for the "*Cognitive Services*" option



3. You will now be in the *Cognitive Services* viewer, where you can see all the *Services* created. In this case, click the "*New Cognitive Service* " button.



4. A window like this will appear for you to define the fields.



App ID: This is the service ID, unique to each Service and defined automatically.

Name: This is the name that will identify the Service.

Description: Brief description of the Service.

Culture: This will determine various recognition aspects, such as currencies, dates, etc.

5. Click the button to create the *Cognitive Service*.

Related Articles

- User search
- How to set up Messenger messaging
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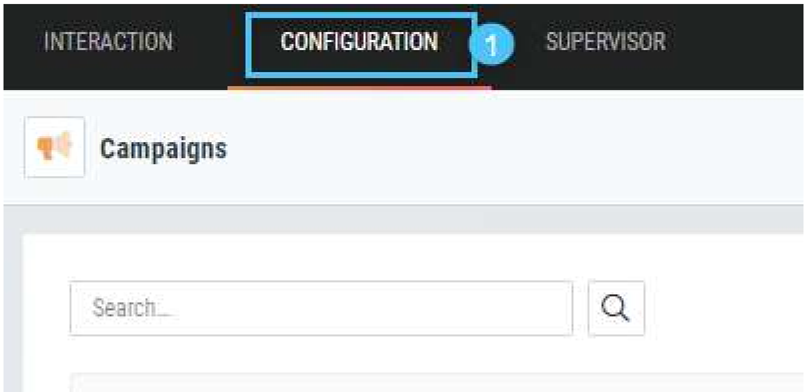
How to edit a Cognitive Service

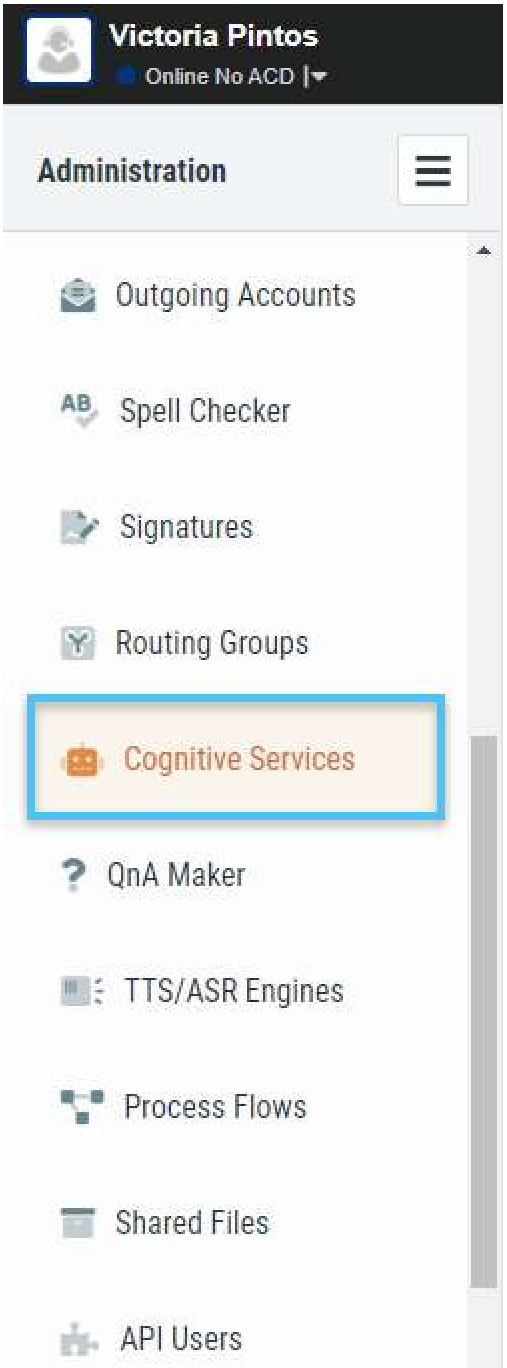
In this article you will learn how to edit a Cognitive Service that you have previously created in inConcert Omnichannel.

To edit a Cognitive Service:

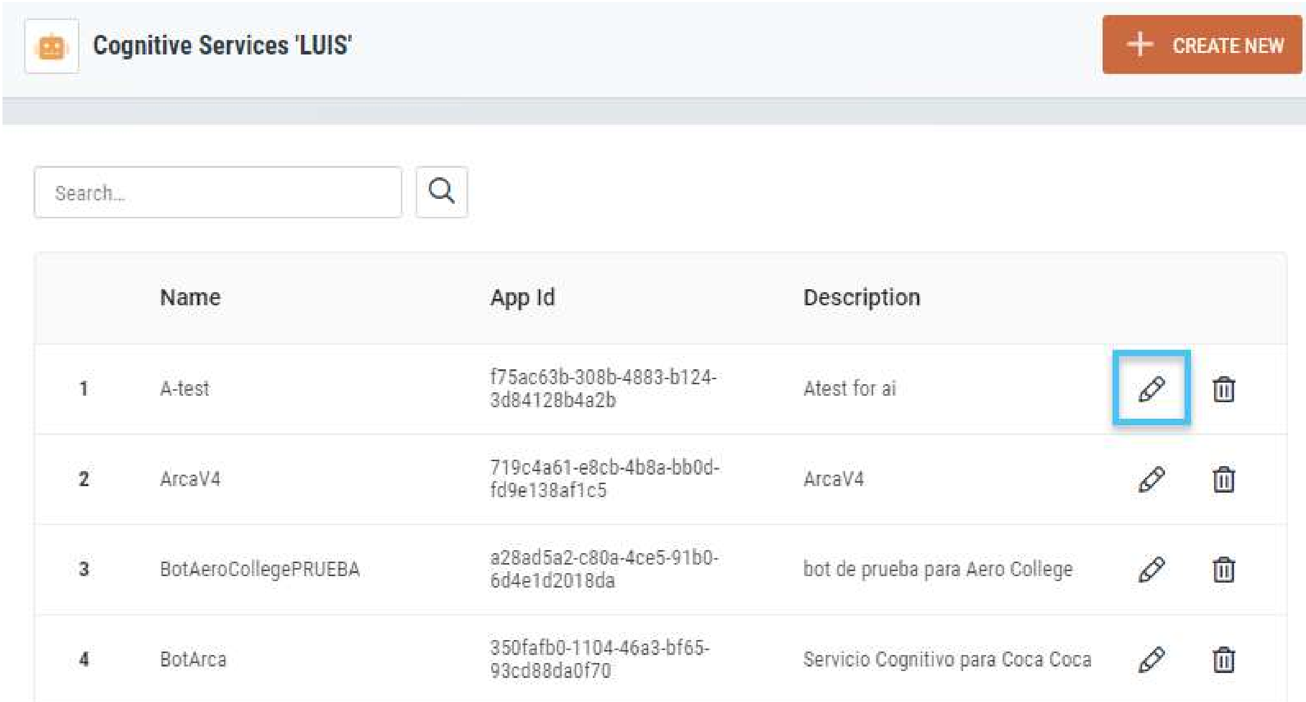
1. Go to the **"*Configuration*"** tab.



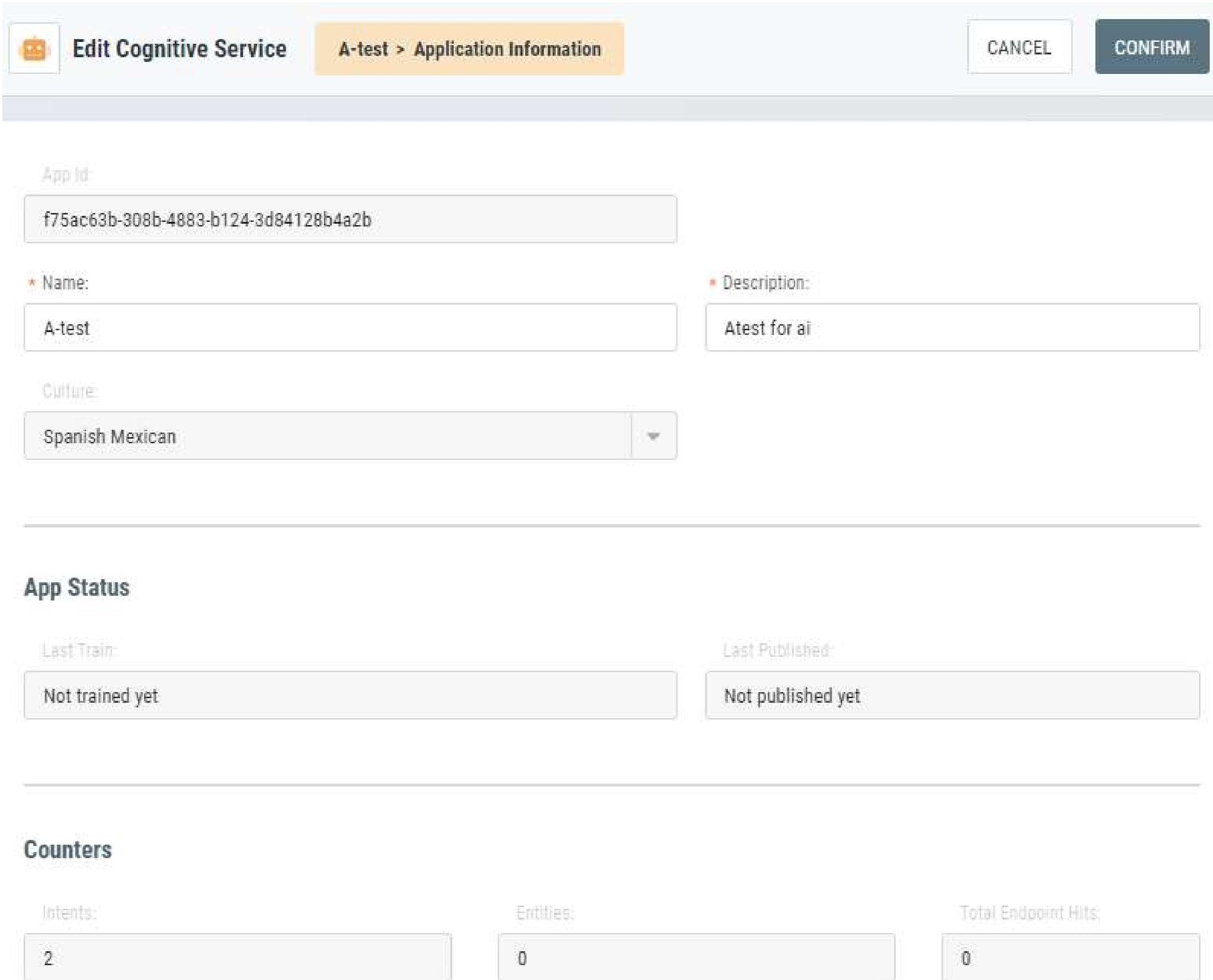
2. In the administration panel, locate the **"*Cognitive Services*"** option.



3. You will see the Cognitive Services viewer; locate the Service you want to modify and click its **"Edit"** button.



4. The following window will appear, allowing you to modify the fields you wish to.



Name: This is the name that will identify the Service.

Description: Brief description of the Service.

The editing panel also lets you access intents, entities, and features to create, edit or delete them.

5. After making the changes, click the **"Update"** button for them to take effect.

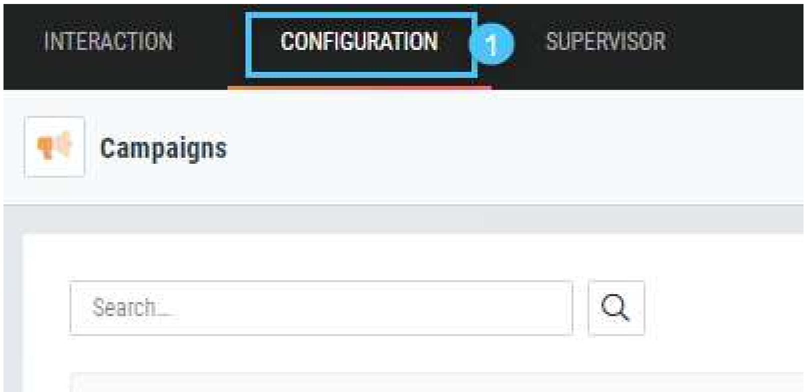
Related Articles

- How to publish training and settings in the cognitive app
- How to define a new Features Phrases
- How to label (mark) entities within an utterance
- How to reassign utterances to intents
- How to use prebuilt entities

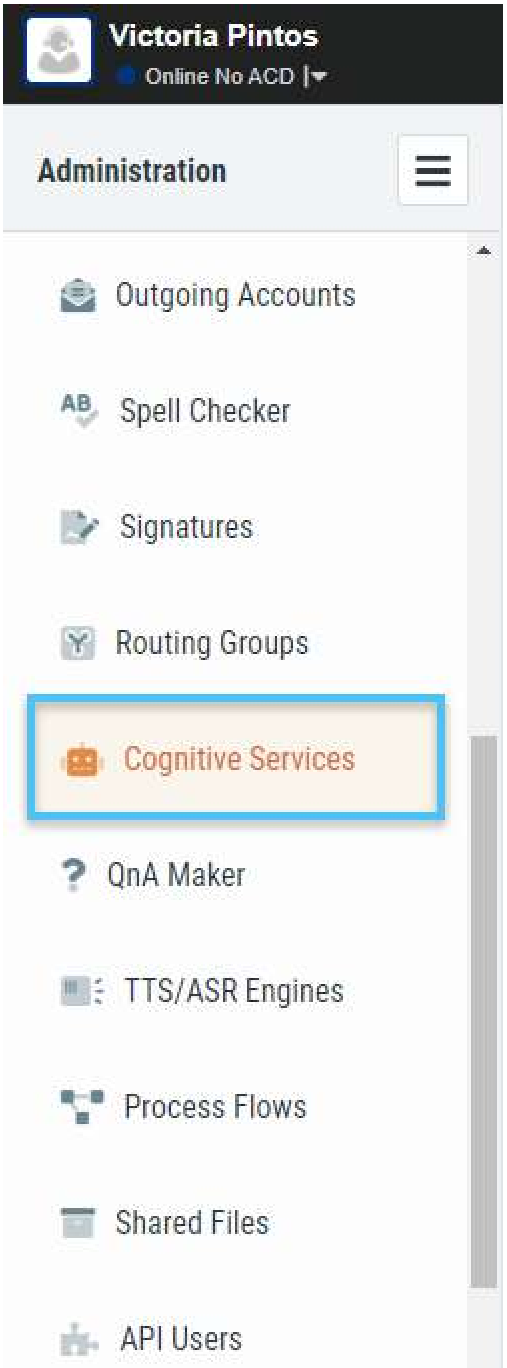
How to delete a Cognitive Service

This article will show you how to delete a Cognitive Service previously created in inConcert Omnichannel.

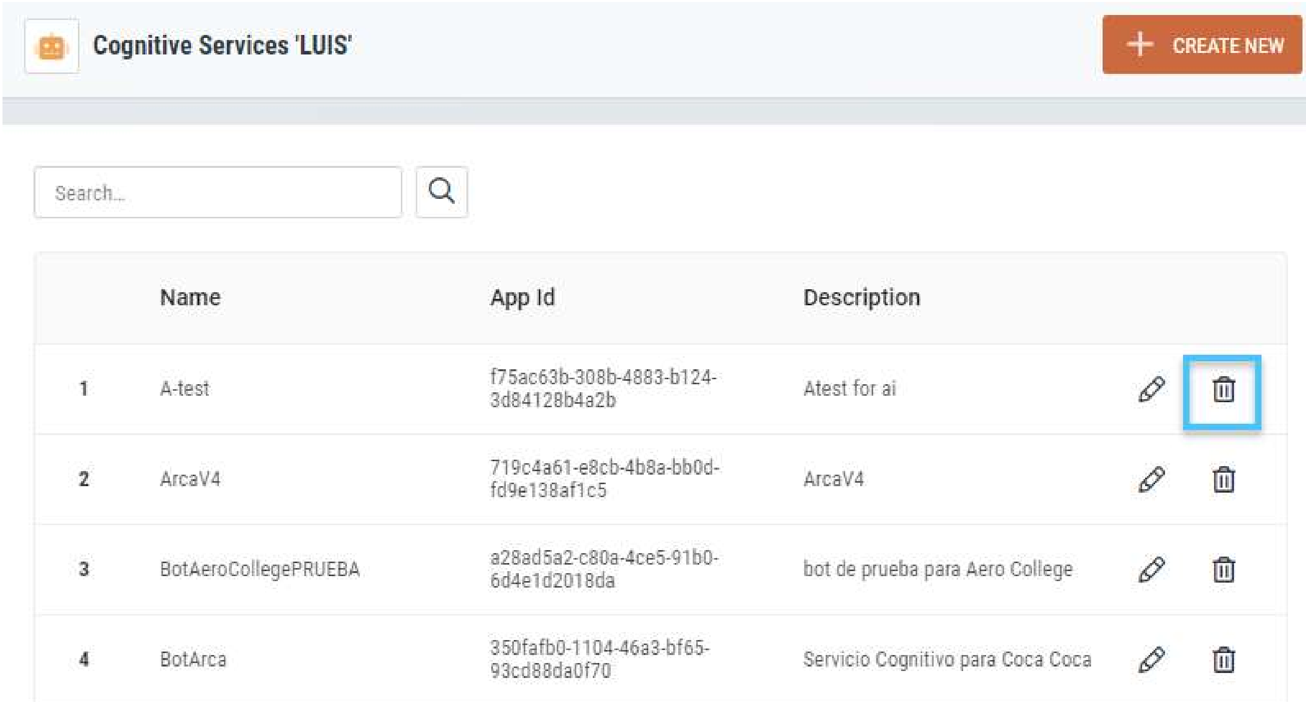
1. Go to the ***"Configuration"*** tab



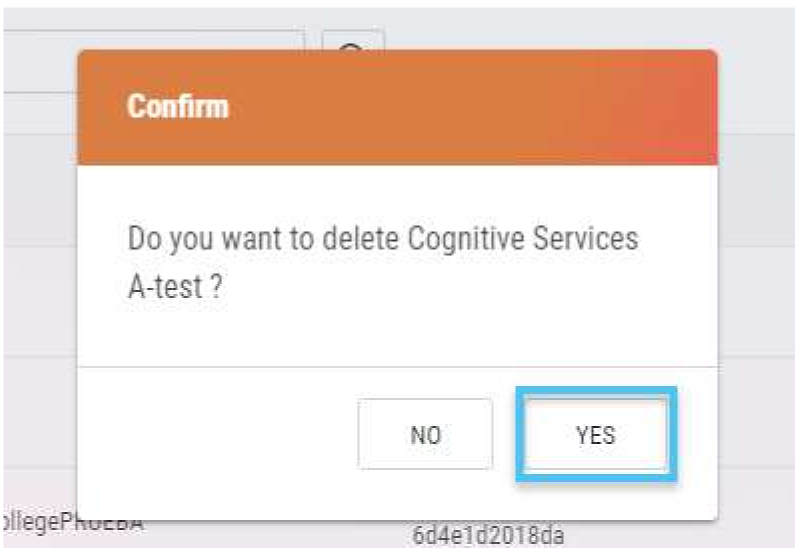
2. In the administration panel, locate the "***Cognitive Services"*** option



3. You will see the Cognitive Services viewer; locate the Service you want to remove and click the ***"Delete"*** button.



4. The following window will appear; to confirm deletion of the Cognitive Service, click the **"*Yes*"** button.



Related Articles

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- How to reassign utterances to intents
- How to use prebuilt entities

How to define a new intent

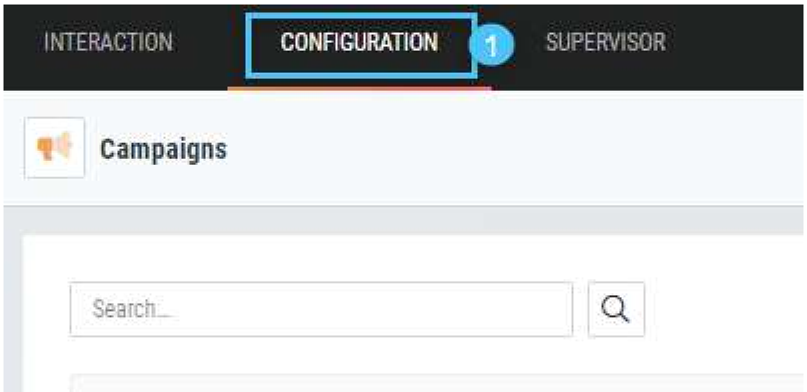
In the following article you will learn how to define a new *Cognitive Service* intent in inConcert Omnichannel.

Create an intent when you consider that a user's particular *intention* generates an action in the *Service.*

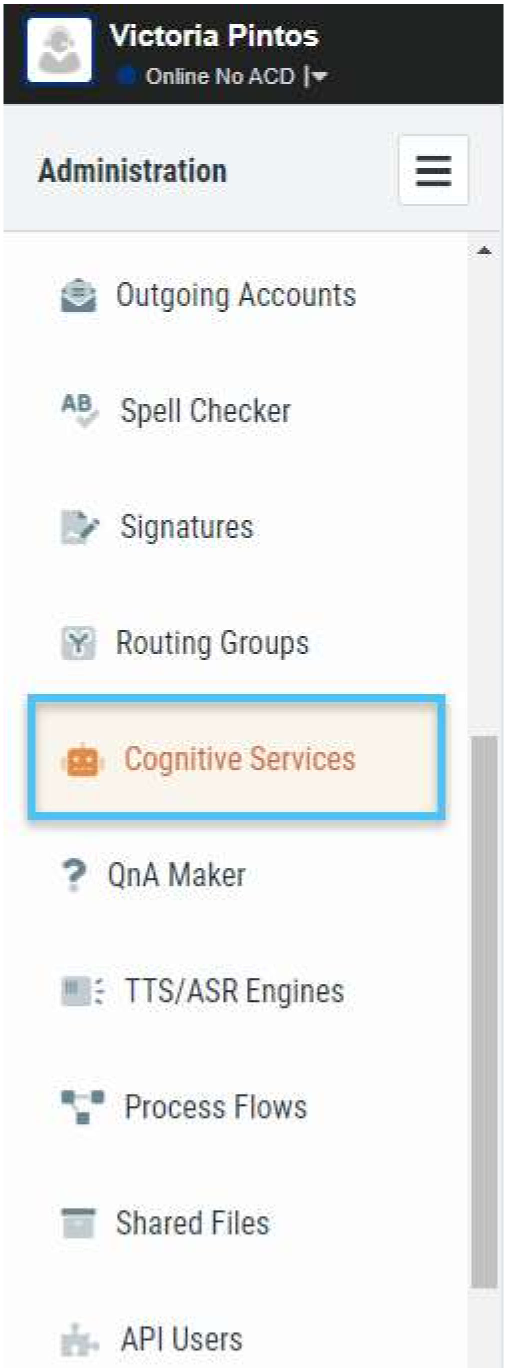
Before defining your first intent, we recommend reading and understanding the following articles:

- What is a Cognitive Service and what is it for?
- What is an intent?
- What is an entity?
- What is an utterance?

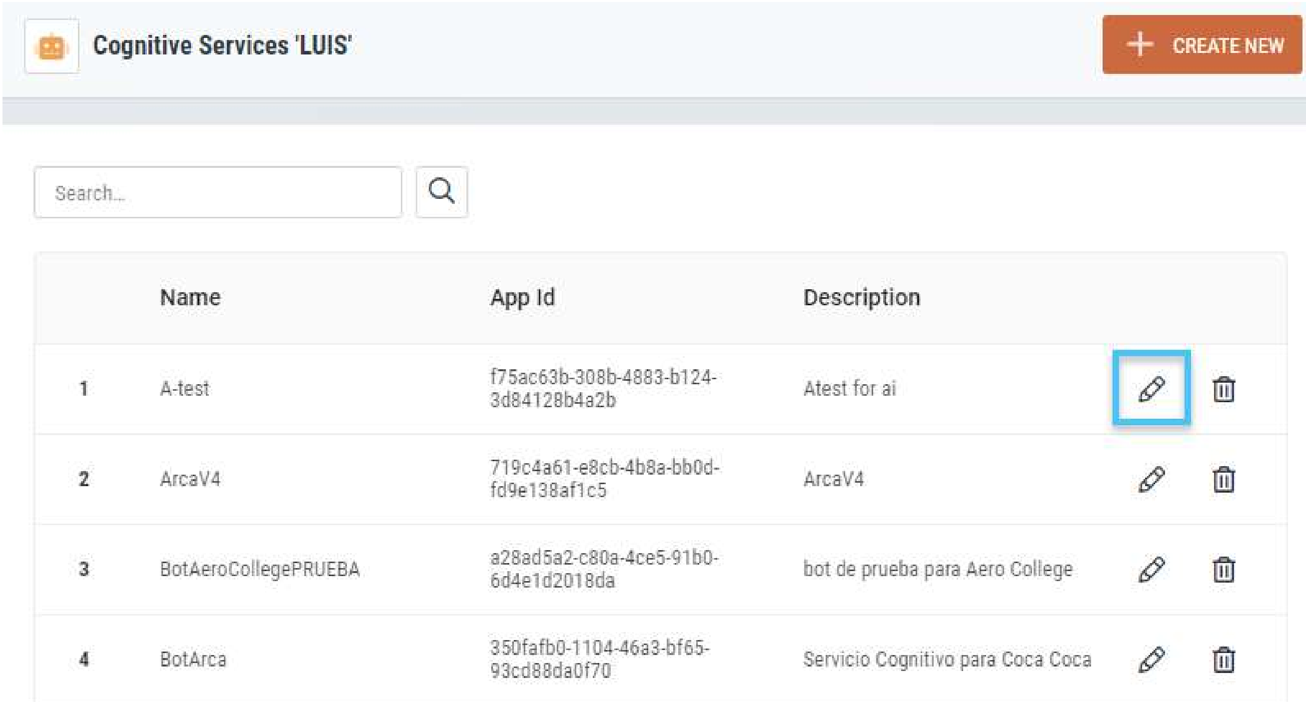
1. Go to the ***"Configuration"*** tab



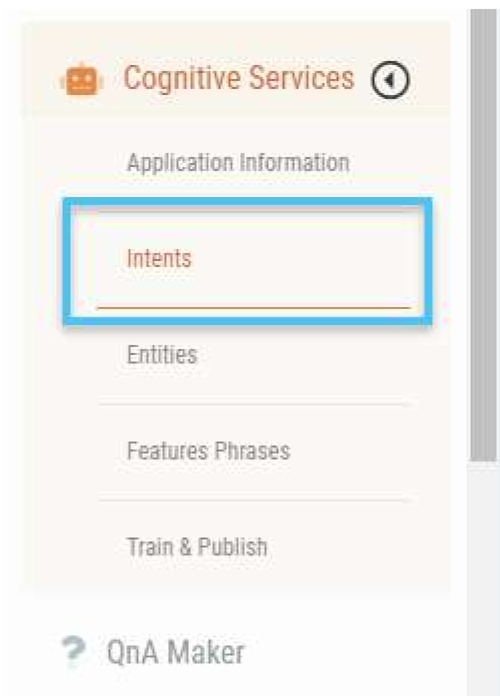
2. In the administration panel, locate the ***"Cognitive Services"*** option.



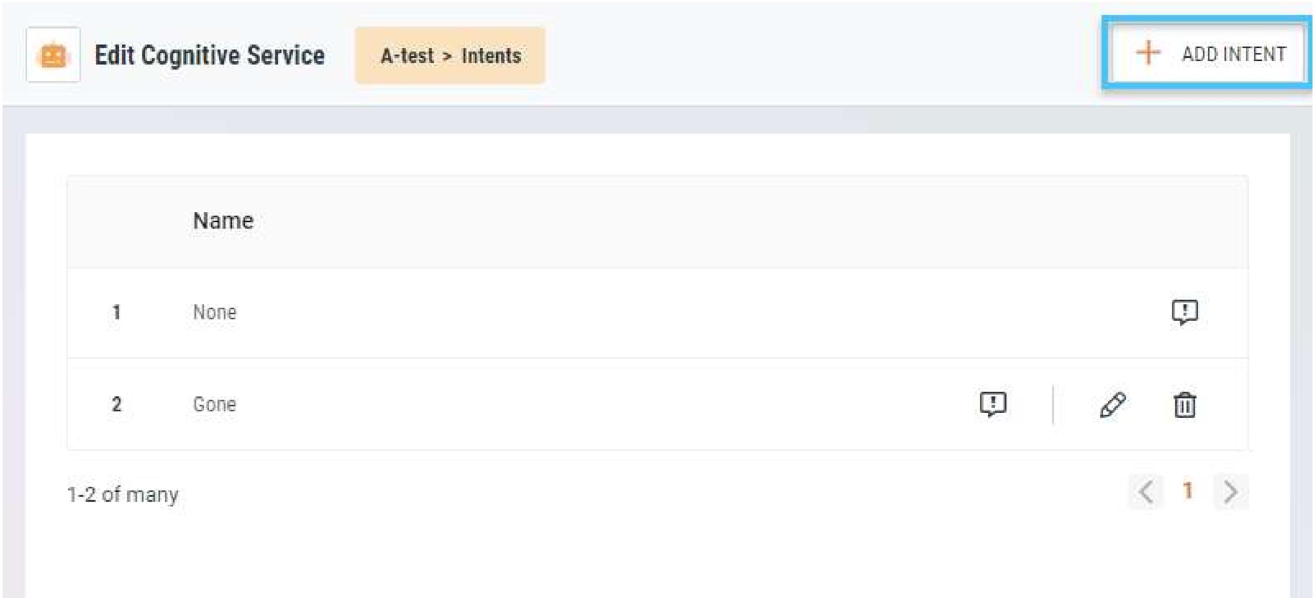
3. You will see the Cognitive Services viewer; locate the Service for which you wish to define an intent and click its ***"Edit"*** button.



4. In the lower left corner of your screen, locate the *Cognitive Services* panel, then click on the ***"Intents"*** option.



5. You will now be in the Intents viewer of the selected Cognitive Service. To define a new one, just click the ***"New Intent"*** button.



None intent

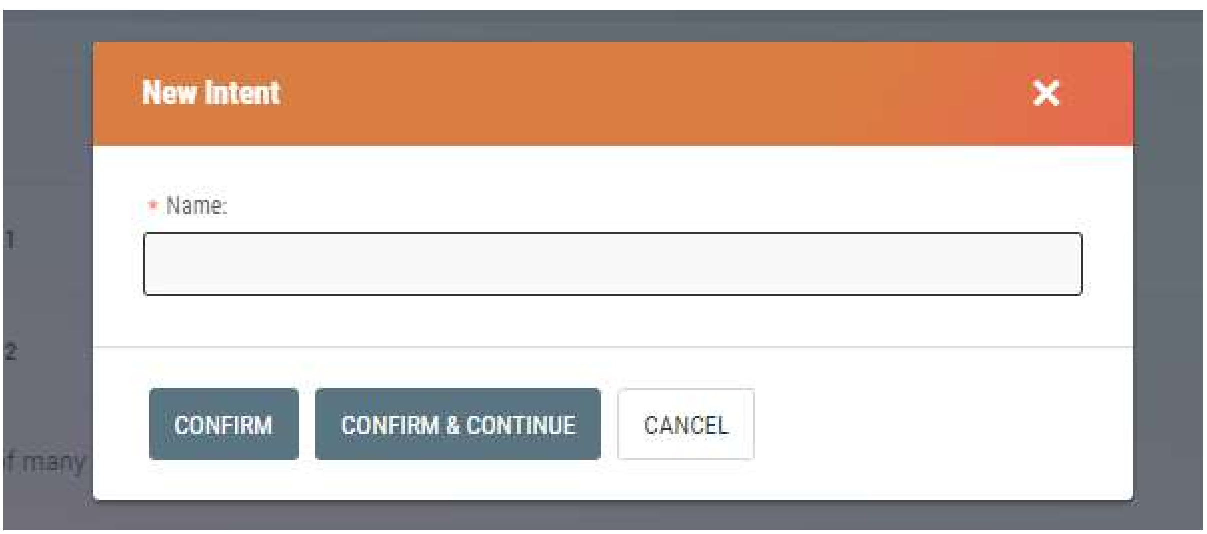
All Cognitive Services have the prebuilt intent "*None*".

This intent teaches LUIS the utterances that are not important for the application domain.

It is recommended that this intent should have between 10 and 20% of the utterances in the *Cognitive Service*. It is also recommended not to leave this intent with no utterances.

Continue reading this article to learn how to define these utterances.

6. The following window will appear on the screen



Name: The name of the intent represents the user's intention, that is, the action to be performed by the *Service*. For example, a flight app might define the "*Book Flight*" intent and an agenda app might define the "*Call*" intent.

a. If you only wish to define one intent, after entering its name click the "Create" button.

OCC will define the intent and take you back to the Intents viewer, where you can define the utterances.

b. If you wish to define more than one intent, after entering its name click the "Create and Continue" button.

In this case OCC will define the intent in the same way but it will remain in the intent creation window so that you can continue to define as many intents as you deem necessary for your *Service*.

Once the intents have been defined, you will be able to define a new utterance.

Related Articles

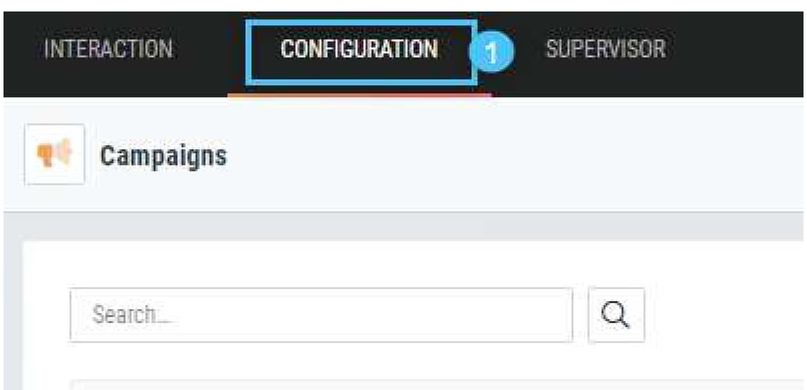
- How to publish training and settings in the cognitive app
- How to define a new Features Phrases
- How to label (mark) entities within an utterance
- How to reassign utterances to intents
- How to use prebuilt entities

How to edit an intent

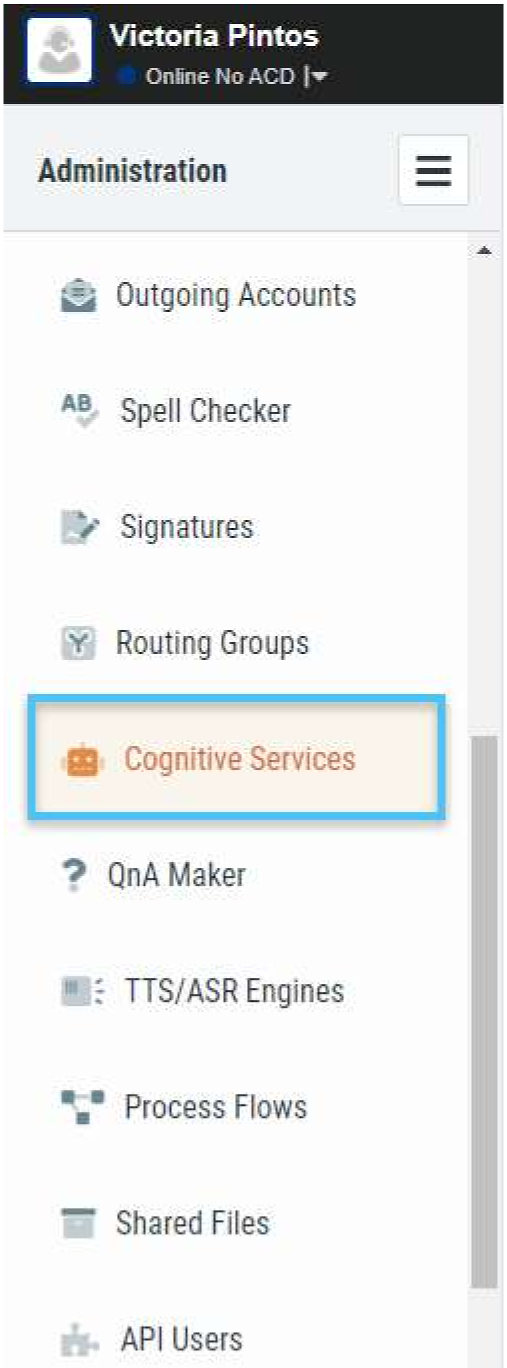
The following article will show you how to edit an intent defined previously in inConcert Omnichannel.

To edit an intent:

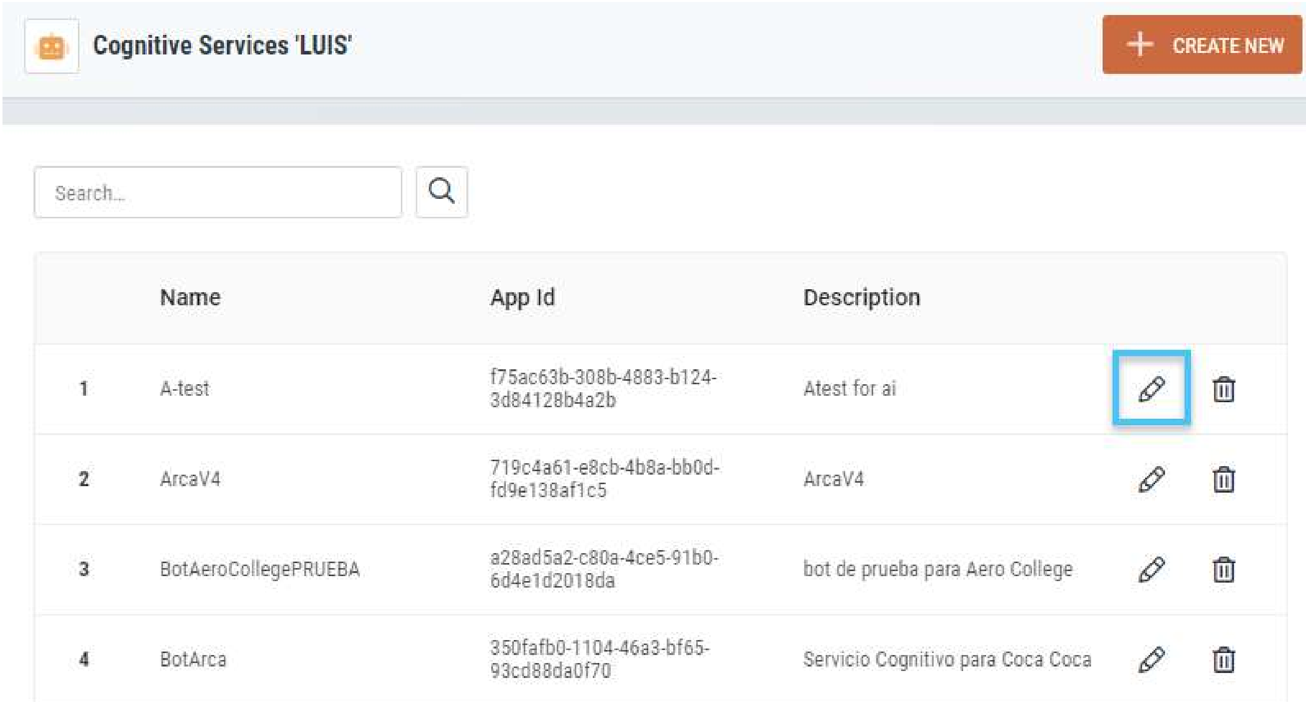
1. Go to the **"*Configuration*"** tab



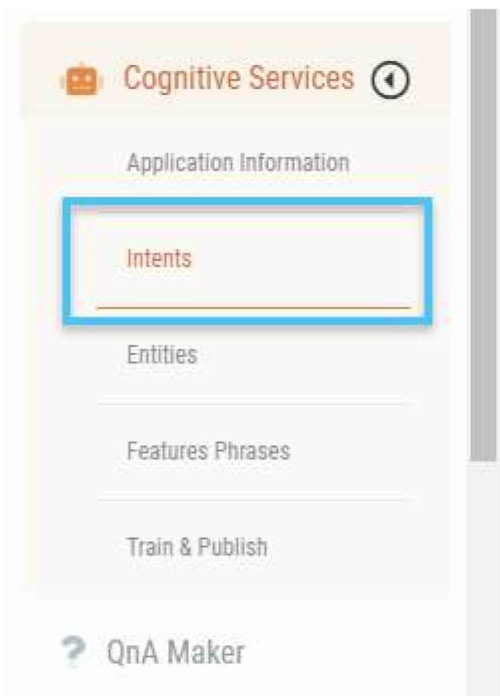
2. In the administration panel, locate the **"*Cognitive Services*"** option.



3. You will see the Cognitive Services viewer; locate the Service for which you wish to define an intent and click its ***"Edit"*** button.



4. In the lower left corner of your screen, locate the *Cognitive Services* panel, then click on the **"*Intents*"** option.



5. You will now be in the *Intent* viewer; choose the intent you want to modify and click its **"Edit"** button.

6. The following window will appear, where you can edit the intent.

Name: The name of the intent will represent the user's intention, that is, the action to be taken by the *Service*. For example, a flight app might define the "*BookFlight*" intent and an agenda app might define the "*Call*" intent

7. To confirm any changes made, click the "Update" button

Related Articles

Content by label

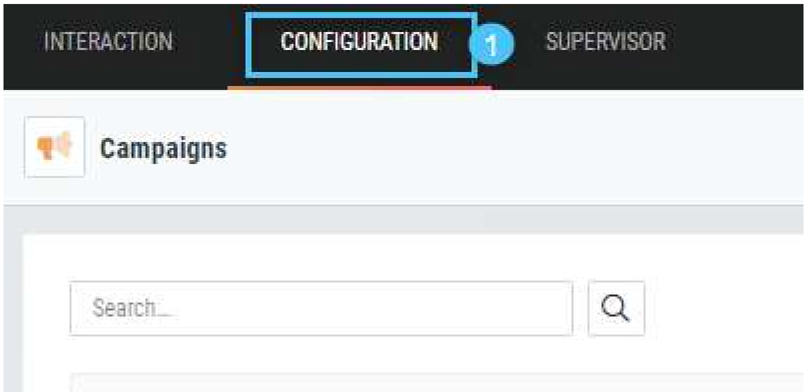
There is no content with the specified labels

How to delete an intent

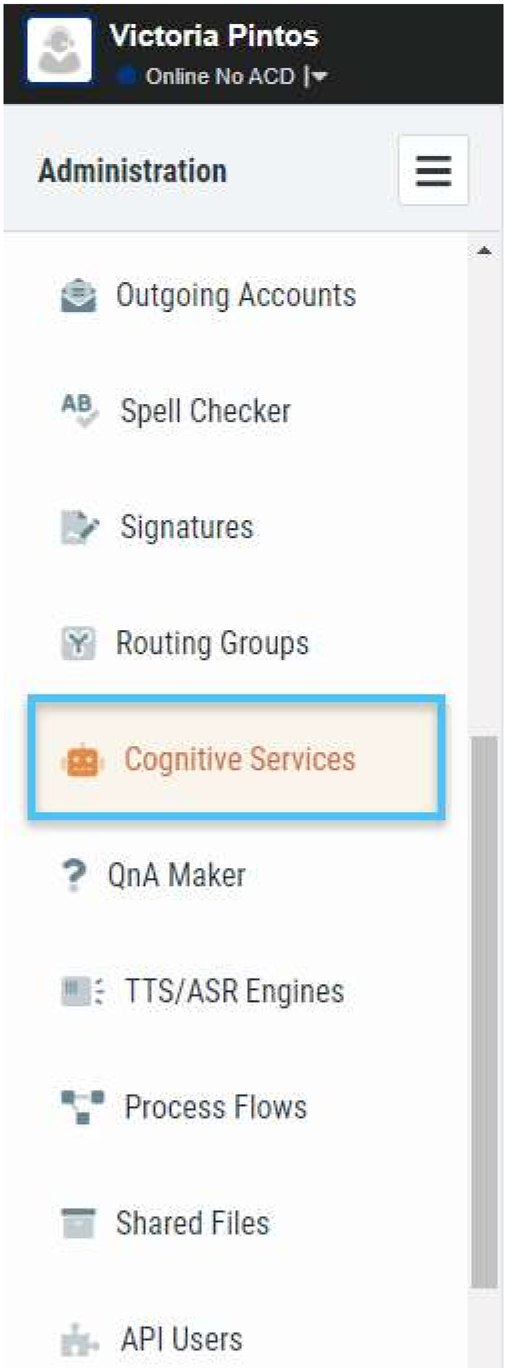
This article shows you how to delete an intent previously defined in inConcert Omnichannel.

To delete an intent:

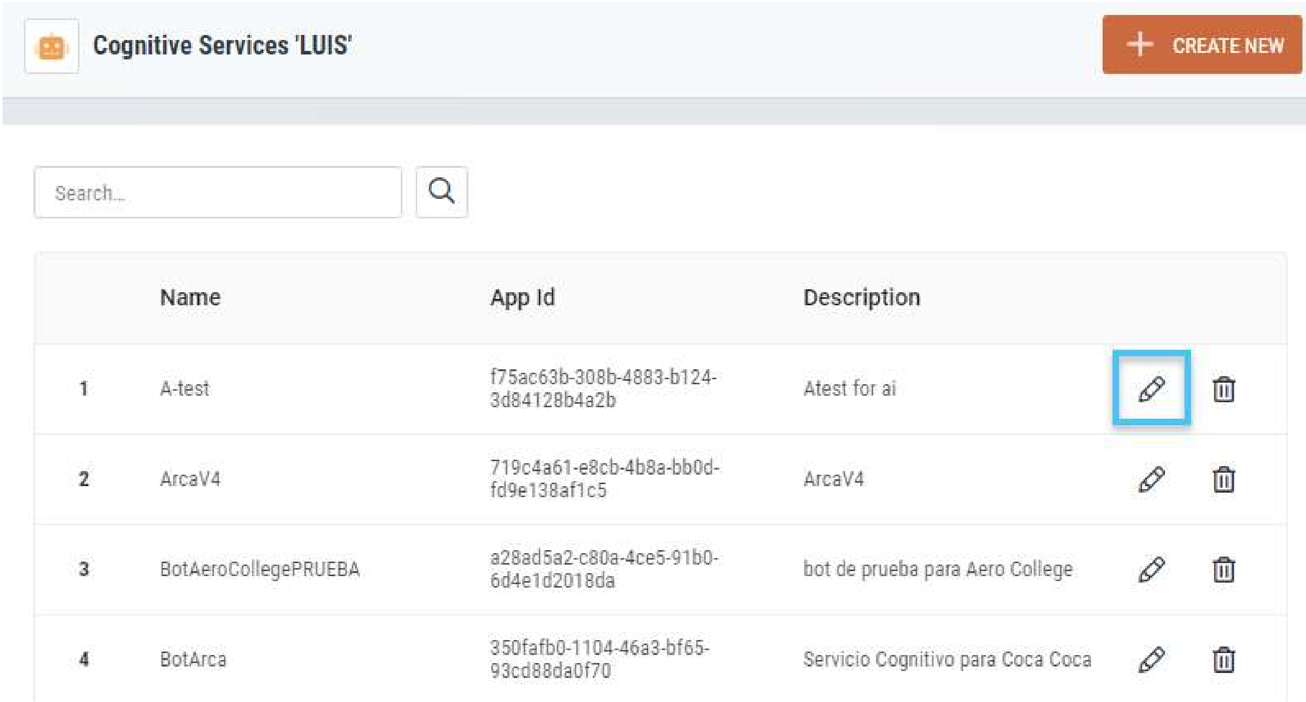
1. Go to the **"*Configuration*"** tab



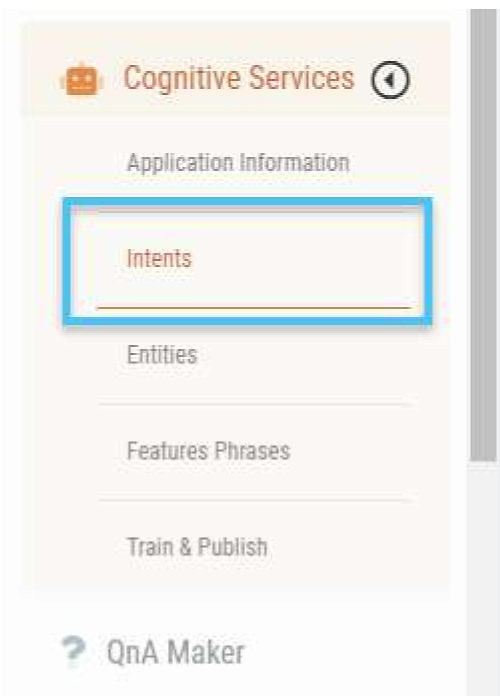
2. In the administration panel, locate the "***Cognitive Services***" option.



3. You will see the Cognitive Services viewer; locate the Service for which you wish to define an intent and click its ***"Edit"*** button.

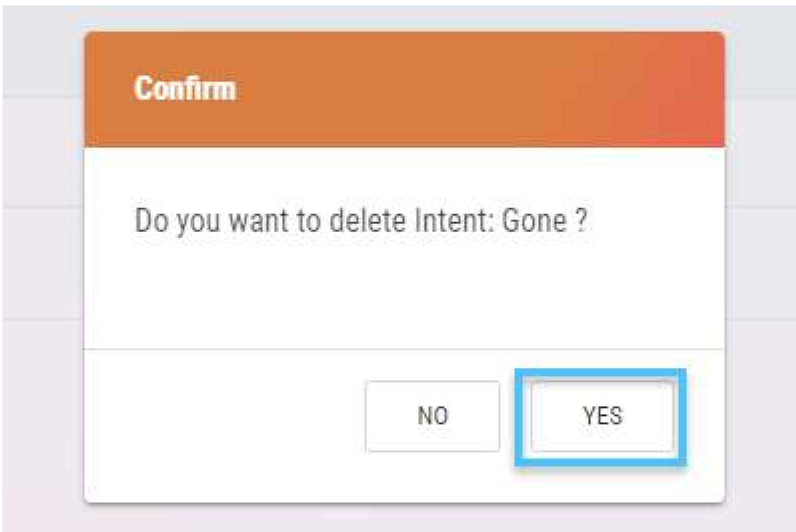


4. In the lower left corner of your screen, locate the *Cognitive Services* panel, then click on the ***"Intents"*** option.



5. You will now be in the Intents viewer; choose the intent(s) you wish to delete and click the appropriate ***"Delete"*** button(s).

6. The following window will appear; to confirm deletion click the ***"Yes"*** button.



Related Articles

- How to publish training and settings in the cognitive app
- How to define a new Features Phrases
- How to label (mark) entities within an utterance
- How to reassign utterances to intents
- How to use prebuilt entities

How to define a new entity

In the following article you will learn how to define a new *Cognitive Service* entity in inConcert Omnichannel.

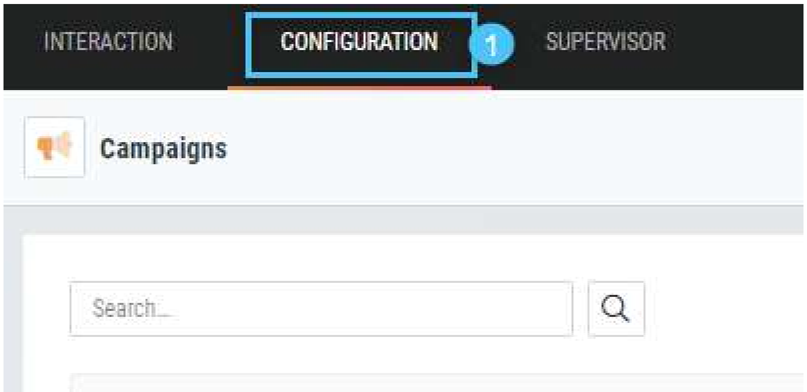
Entities represent a collection of similar objects (places, people, concepts, events, etc.).

Before defining your first entity, we recommend reading and understanding the following articles:

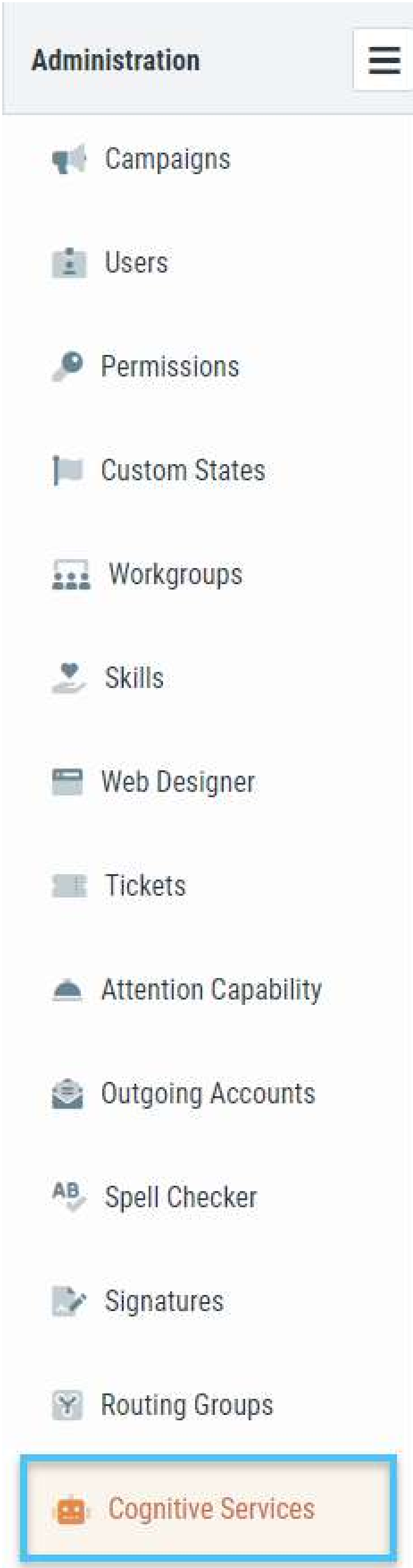
- What is a Cognitive Service and what is it for?
- What is an intent?
- What is an entity?
- What is an utterance?

To create an entity:

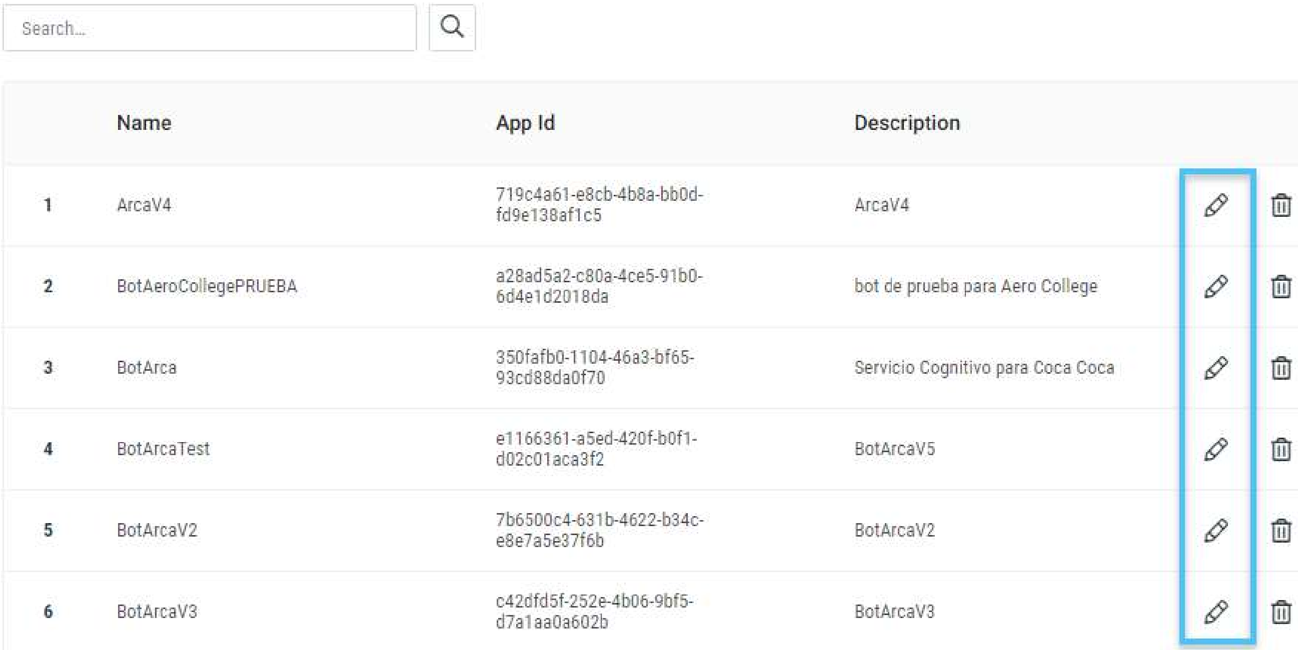
1. Go to the ***"Configuration"*** tab.



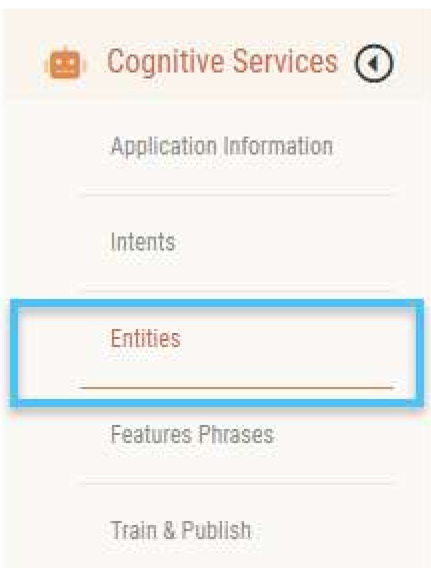
2. In the administration panel, locate the ***"Cognitive Services"*** option.



3. You will see the Cognitive Services viewer; locate the Service for which you wish to define an entity and click its ***"Edit"*** button.

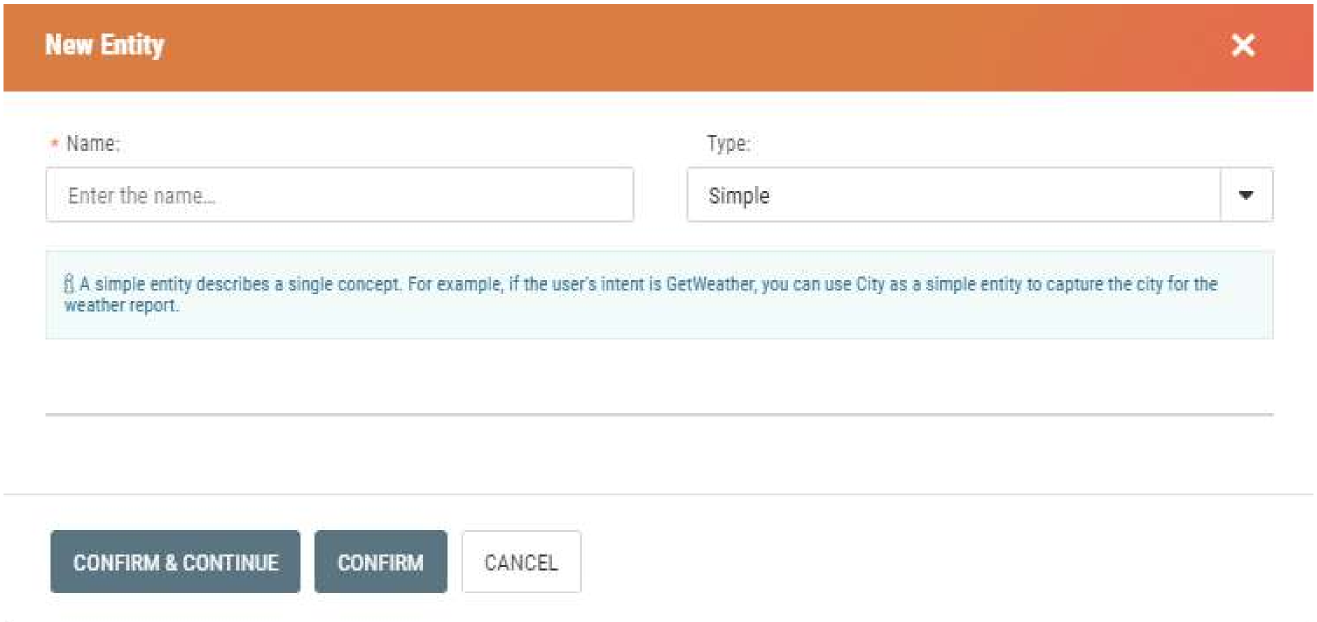


4. In the lower left corner of your screen, locate the *Cognitive Services* panel, then click on the ***"Entities"*** option.



5. You will now be in the *Cognitive Service* entities viewer. To define a new entity, simply click the ***"New Entity"*** button.

6. The following window will appear on the screen.



Name: Choose a name that identifies the datum you want to extract from the utterance. For example, in a flight application you might define the entities "*Departure Location*" and "*DestinationLocation*"

Type: Select the type of entity based on how you think they should be extracted and how they should be represented once extracted.

Entity type	Purpose
Single	Contains a single concept in a word or phrase.
Composite	Grouping of entities, regardless of type.
Hierarchical	Grouping of single entities.

a. If you only wish to define one *entity*, after typing the name and choosing its type click the "Create" button.

OCC will define the *entity* and take you back to the Entities viewer.

b. If you wish to define more than one *entity*, after typing the name and choosing its type click the "Create and Continue" button.

In this case, OCC will define the *entity* in the same way, but it will remain in the entity creation window so that you can continue defining however many entities you deem necessary for your *Service*.

Related Articles

- How to publish training and settings in the cognitive app
- How to define a new Features Phrases
- How to label (mark) entities within an utterance
- How to reassign utterances to intents
- How to use prebuilt entities

How to use prebuilt entities

In the following article you will learn how to use a prebuilt entity in a *Cognitive Service* in inConcert Omnichannel.

Prebuilt entities are not manually assigned to utterances; rather, the system automatically selects the words that have been assigned to them. In other words, you do not need to add sample utterances for these entities.

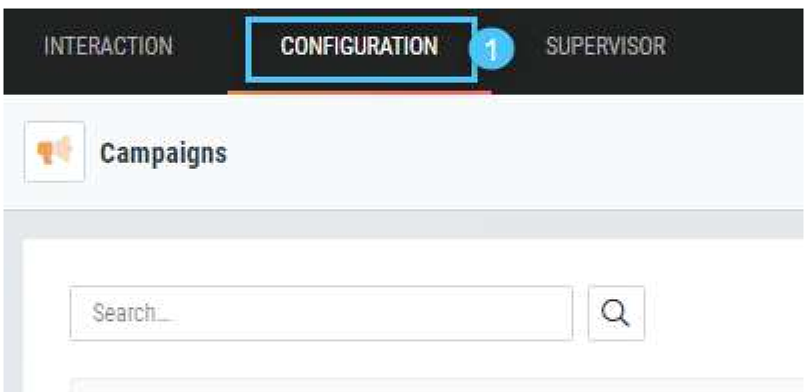
Entities represent a collection of similar objects (places, people, concepts, events, etc.).

Before defining your first entity, we recommend reading and understanding the following articles:

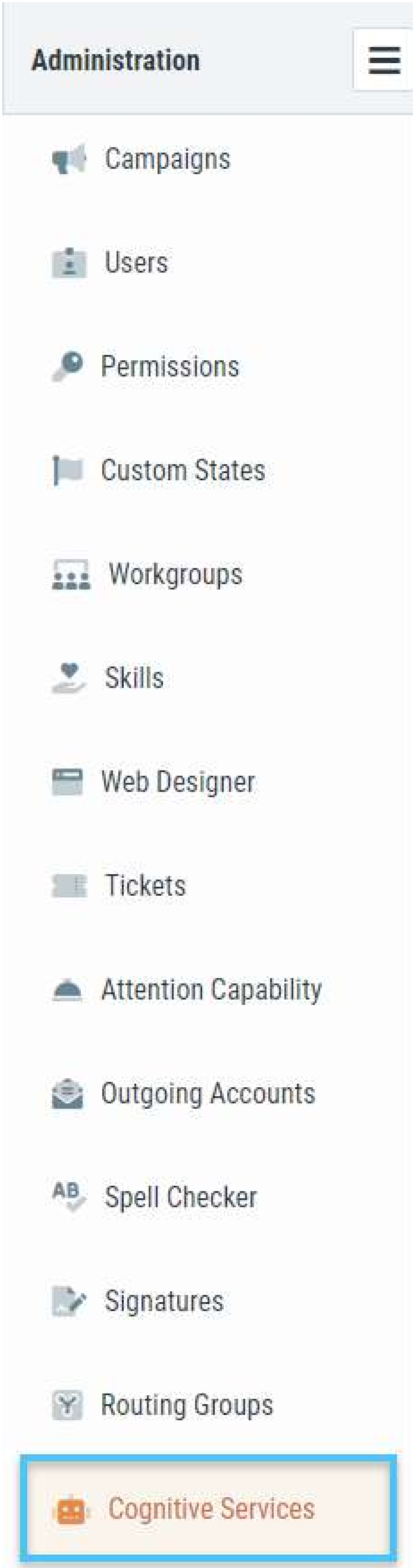
- What is a Cognitive Service and what is it for?
- What is an intent?
- What is an entity?
- What is an utterance?

To use a prebuilt entity:

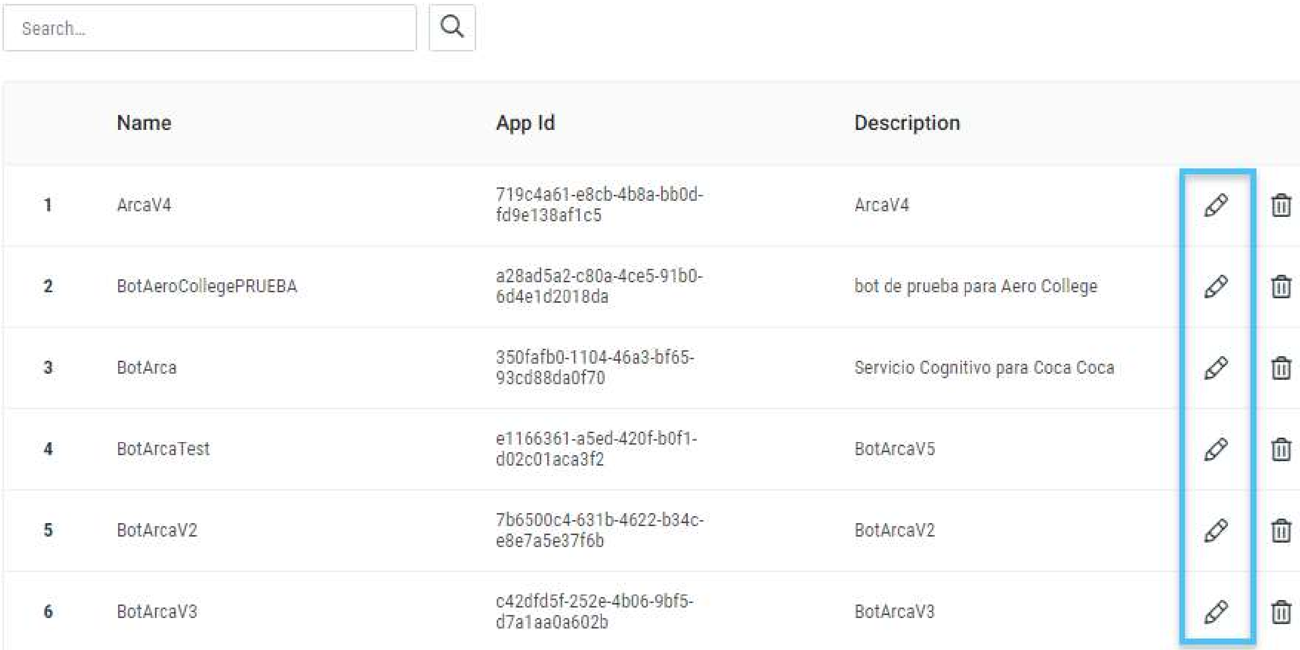
1. Go to the **"*Configuration*"** tab.



2. In the administration panel, locate the **"*Cognitive Services*"** option.

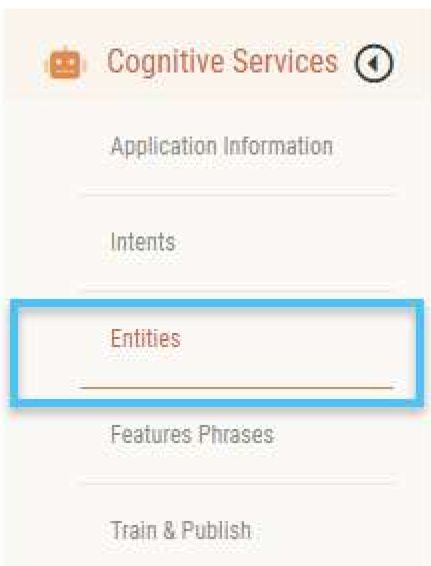


3. You will see the Cognitive Services viewer; locate the Service in which you want to define a prebuilt entity and click its ***"Edit"*** button.



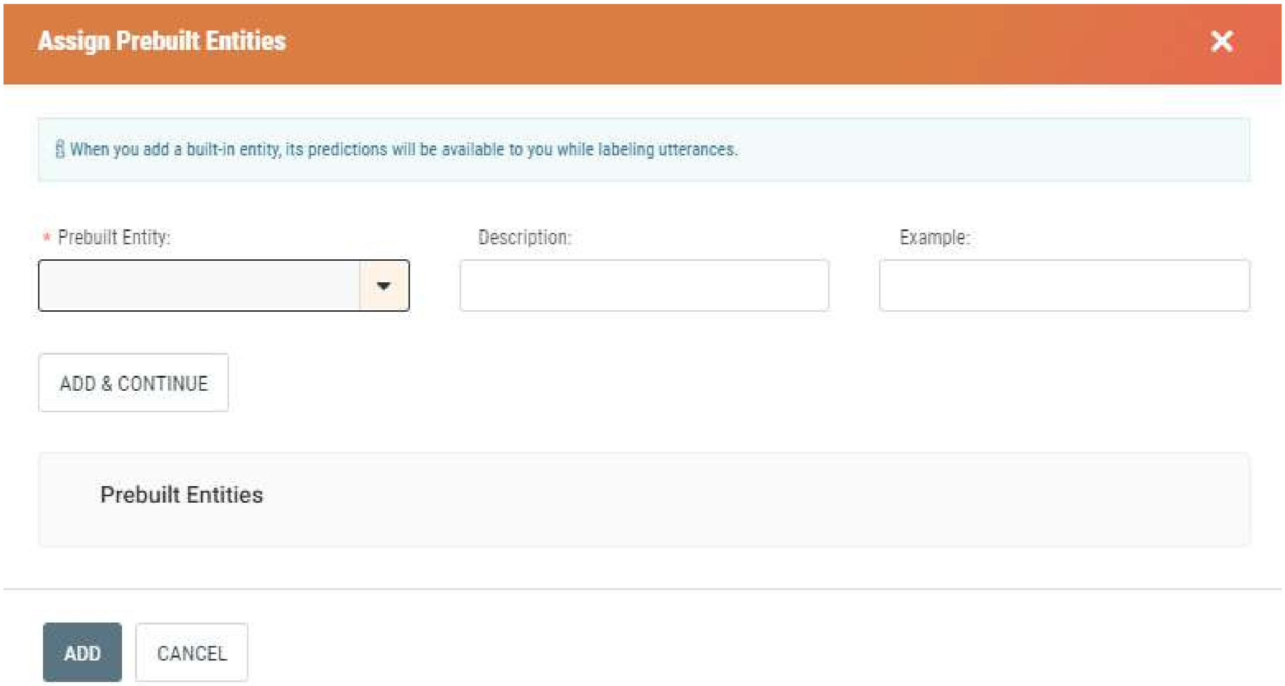
	Name	App Id	Description
1	ArcaV4	719c4a61-e8cb-4b8a-bb0d-fd9e138af1c5	ArcaV4
2	BotAeroCollegePRUEBA	a28ad5a2-c80a-4ce5-91b0-6d4e1d2018da	bot de prueba para Aero College
3	BotArca	350fafb0-1104-46a3-bf65-93cd88da0f70	Servicio Cognitivo para Coca Coca
4	BotArcaTest	e1166361-a5ed-420f-b0f1-d02c01aca3f2	BotArcaV5
5	BotArcaV2	7b6500c4-631b-4622-b34c-e8e7a5e37f6b	BotArcaV2
6	BotArcaV3	c42dfd5f-252e-4b06-9bf5-d7a1aa0a602b	BotArcaV3

4. In the lower left corner of your screen, locate the *Cognitive Services* panel, then click on the ***"Entities"*** option.



5. You will now be in the *Cognitive Service* entities viewer. To use a prebuilt entity, click the ***"ASSIGN PREBUILT ENTITY"*** button.

a. The following window will appear on the screen:



*** Prebuilt entity:**

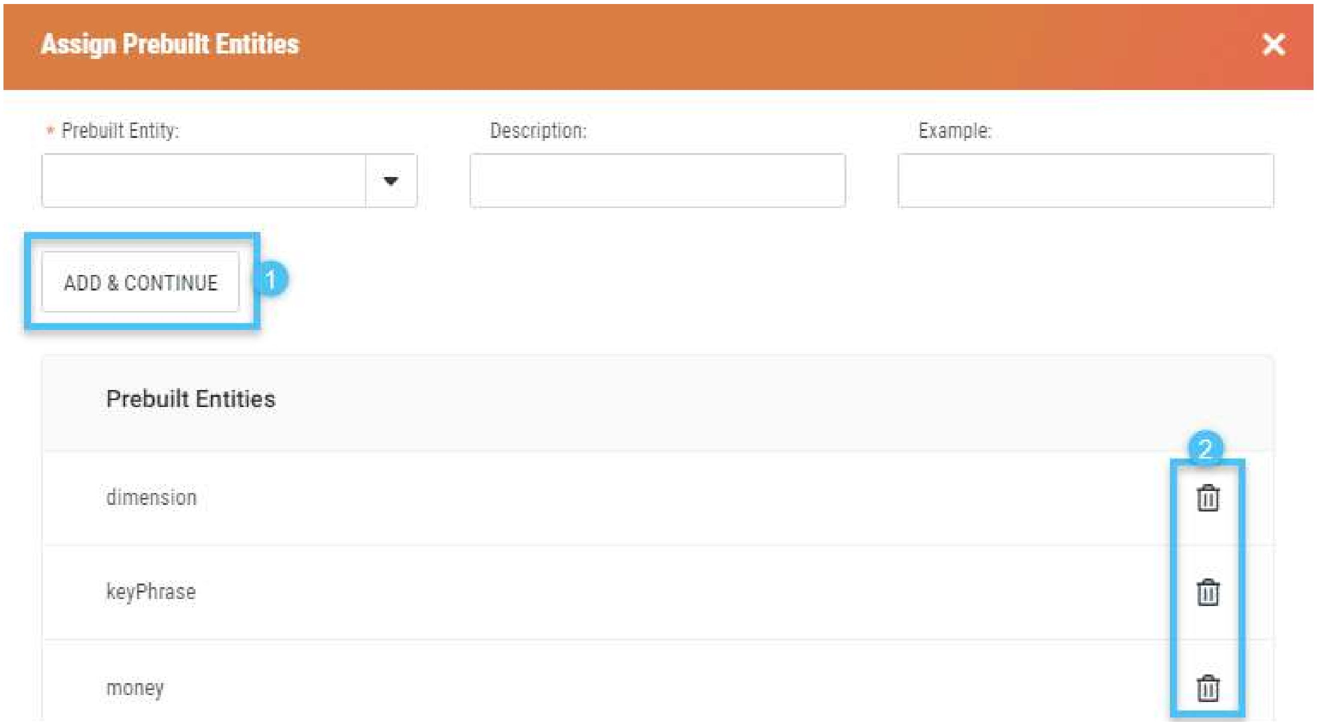
Click here to expand...

- age
- dimension
- email
- keyPhrase
- money
- number
- phonenumber
- ordinal
- percentage
- url
- datetimeV2
- temperature

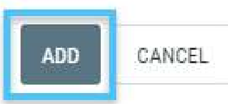
Description: depending on the prebuilt entity selected, it will show a description of it.

Example: depending on the prebuilt entity selected, it will show an example of it.

6. To add an entity, click the **"ADD & CONTINUE"** button; you will be able to add as many as you see fit. Should you wish to delete a prebuilt entity from the list, click the **"DELETE"** button.



7. Click the **"ASSIGN"** button to assign the selected entities.



8. The system will then show a screen where all the entities created so far will be listed.

Related Articles

- User search
- How to set up Messenger messaging
- How to associate a YouTube account
- How to associate an application from Google Play Store
- How to associate an application from the App Store

How to train an intent using utterances

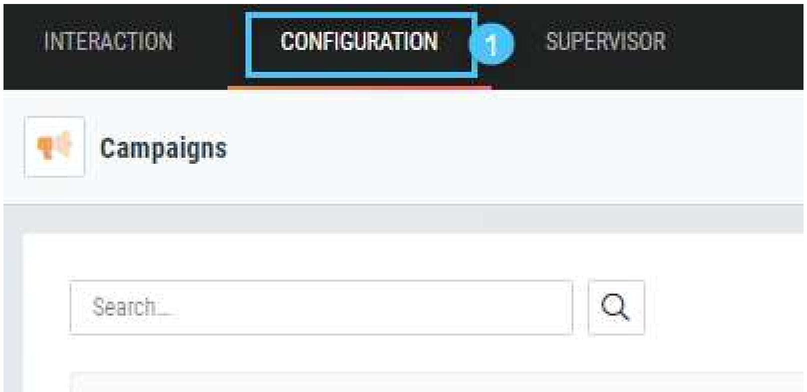
In the following article you will learn how to train a *Cognitive Service* intent using utterances in inConcert Omnichannel.

To get LUIS to extract intents and entities, it is important to capture several different example utterances for each intent.

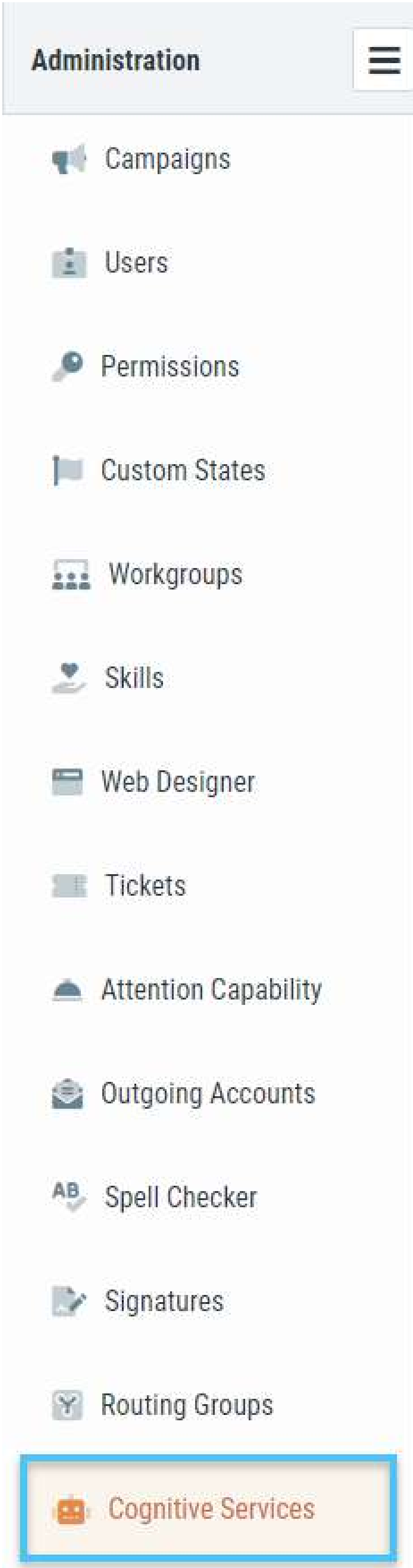
> In order to train an intent using utterances, you must first create an intent.

To train an intent using utterances:

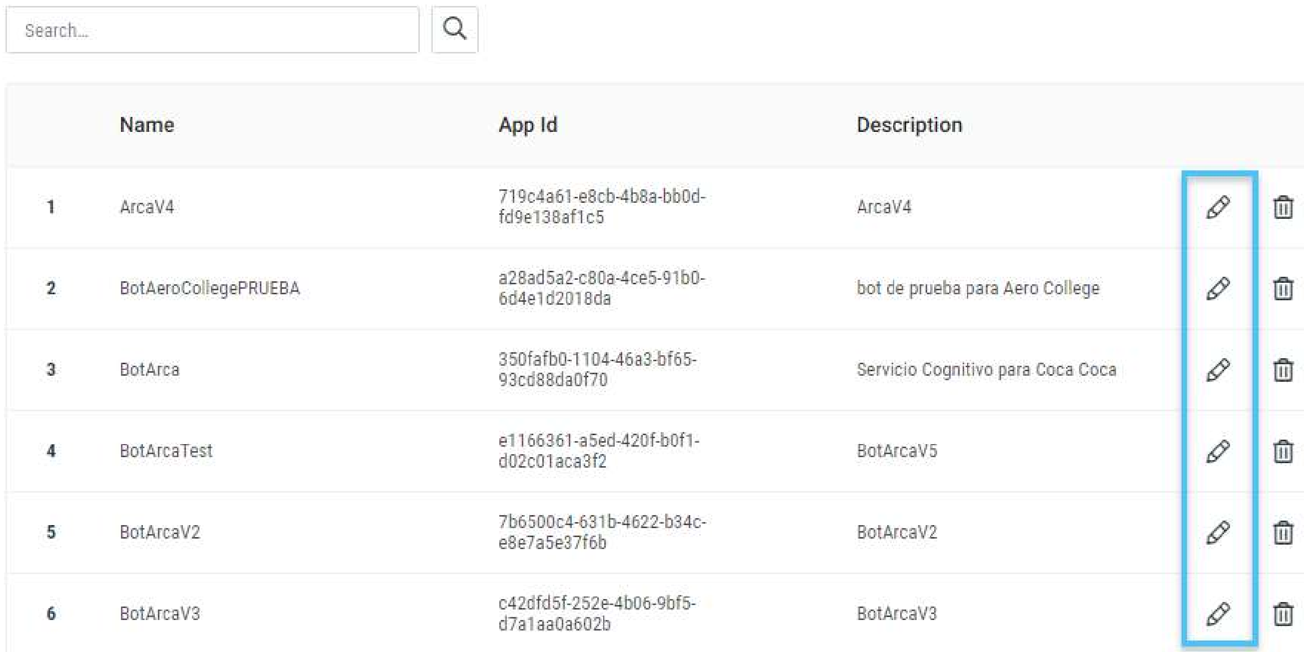
1. Go to the ***"Configuration"*** tab



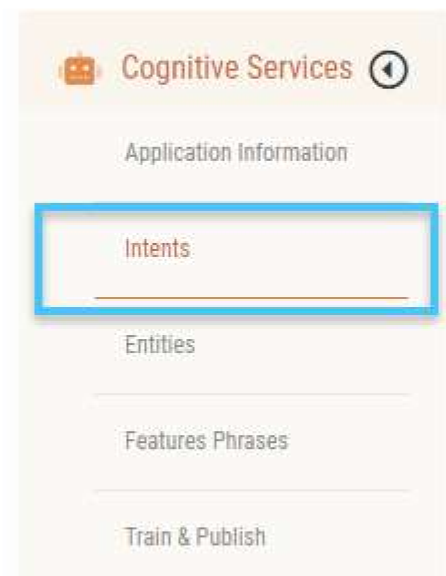
2. In the administration panel, locate the **"*Cognitive Services*"** option.


Administration
Campaigns
Users
Permissions
Custom States
Workgroups
Skills
Web Designer
Tickets
Attention Capability
Outgoing Accounts
Spell Checker
Signatures
Routing Groups
Cognitive Services

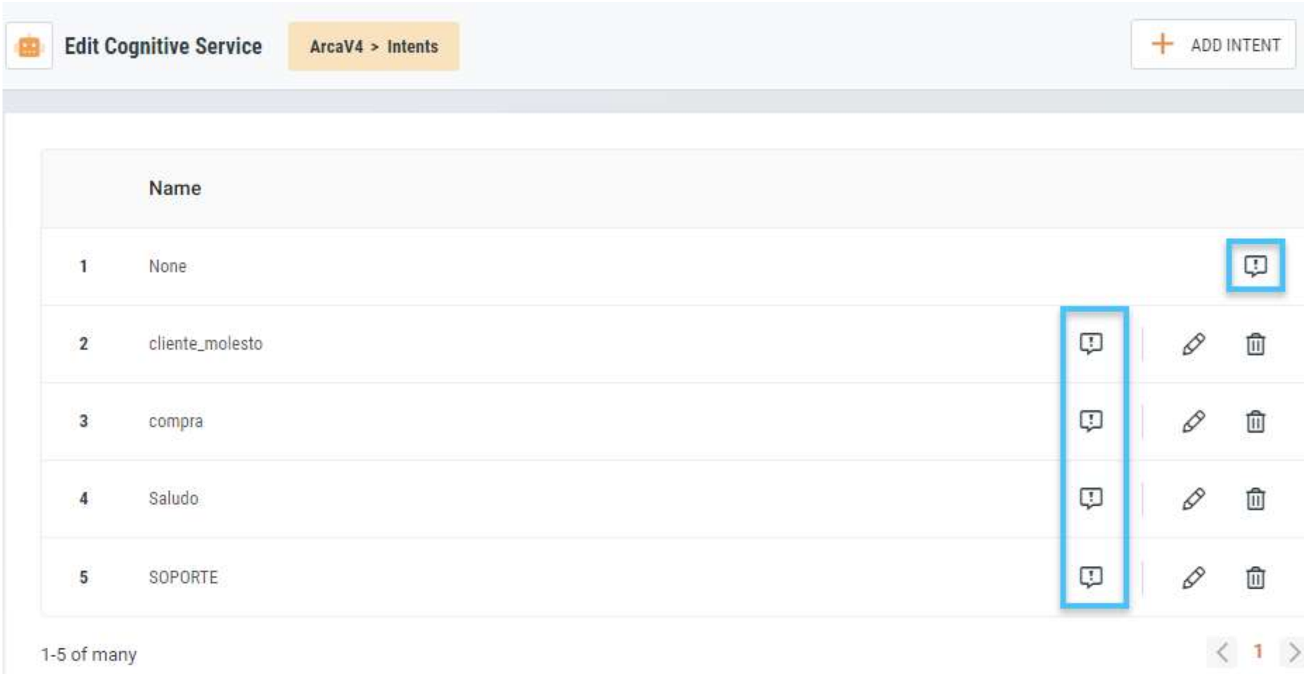
3. You will see the Cognitive Services viewer; locate the Service in which the intent you wish to train is located and click its ***"Edit"*** button.



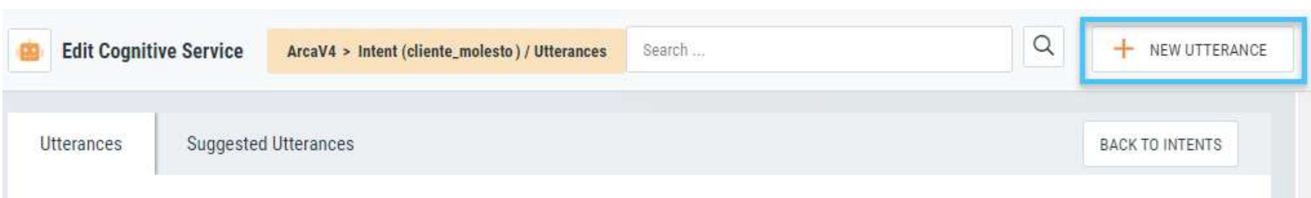
4. In the lower left corner of your screen, locate the *Cognitive Services* panel, then click on the ***"Intents"*** option.



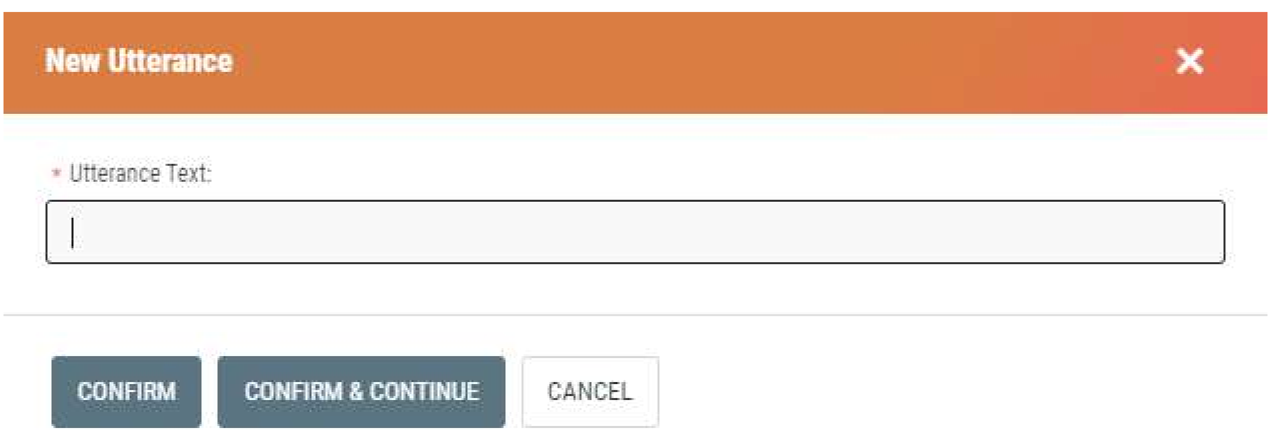
5. You will now be in the Intents viewer of the selected Cognitive Service. To define an utterance, simply click the ***"Utterances"*** button associated with the intent you wish to train.



6. The list of utterances associated with the selected intent will then appear. To create a new one, click the **"New Utterance"** button.



7. The following window will be displayed on the screen.



Utterance text: The text of the utterance must be a phrase that users might type if they have a particular intention. It is advisable to add several utterances that mean the same thing but are constructed in different ways. For example, for the BookFlight intent, one utterance might be "Hello, I would like to book a flight".

Tips

- Create utterances of varying length.
- Create utterances with correct and incorrect grammar.
- Switch word positions.

- Create utterances containing typos.
- Use synonyms. LUIS deduces synonyms intelligently from context.

a. If you only wish to define one utterance (definitely not recommended), after determining the *Text of the utterance* click the **"Create"** but ton.

OCC will define the utterance and take you back to the Intent viewer, where you can define utterances.

b. If you wish to define more than one utterance, after determining the *Text of the utterance* click the **"Create and Continue"** button.

In this case, OCC will define the utterance in the same way but the utterance creation window will remain so that you can continue defining as many utterances as you deem necessary for training.

Related Articles

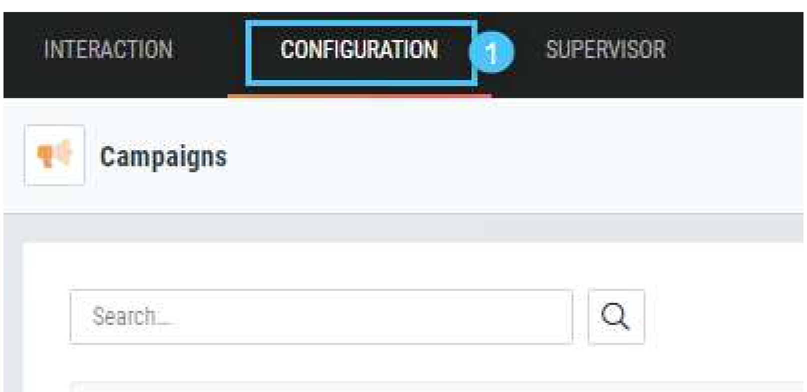
- User search
- How to set up Messenger messaging
- How to associate a YouTube account
- How to associate an application from Google Play Store
- How to associate an application from the App Store

How to reassign utterances to intents

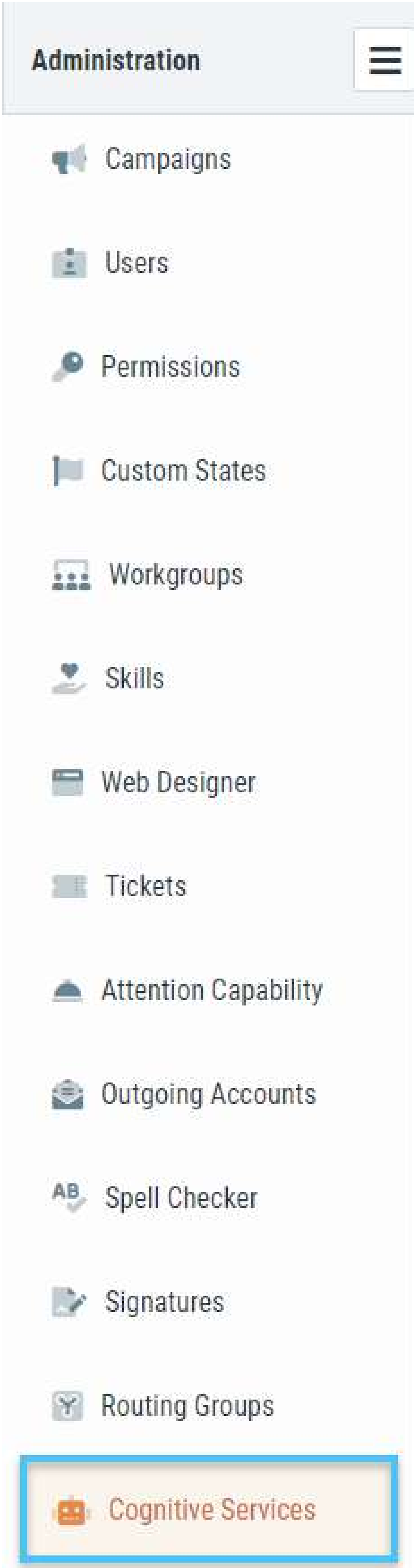
The following article will show you how to reassign utterances you have defined in one particular intent to another one. This will enable more effective learning in your *Cognitive Services*.

To reassign previously defined utterances to a new intent:

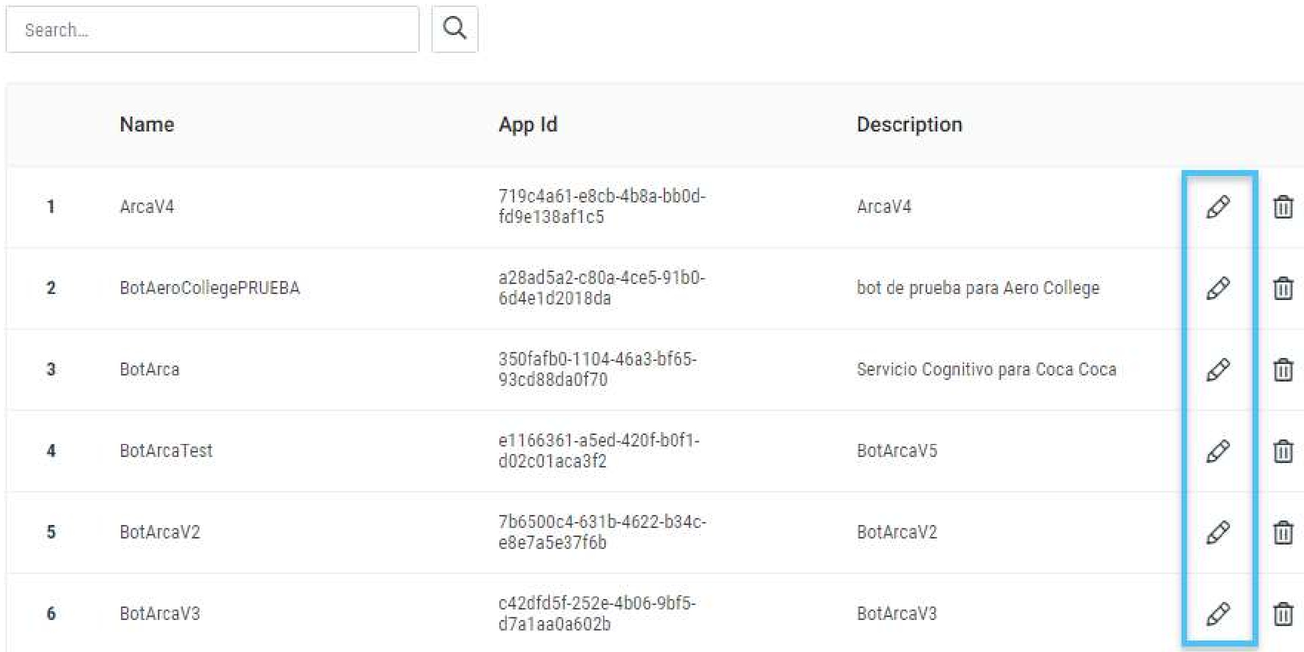
1. Go to the **"*Configuration*"** tab.



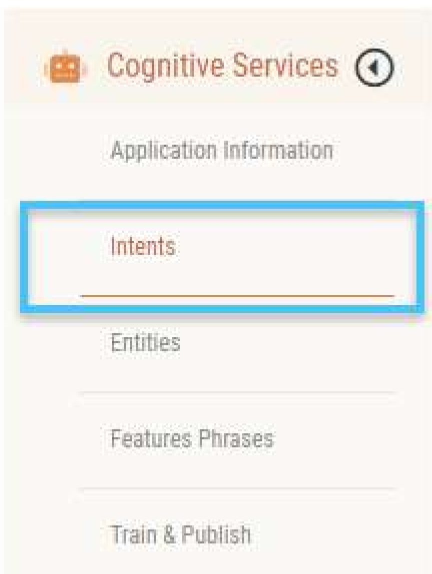
2. In the administration panel, locate the **"*Cognitive Services*"** option.



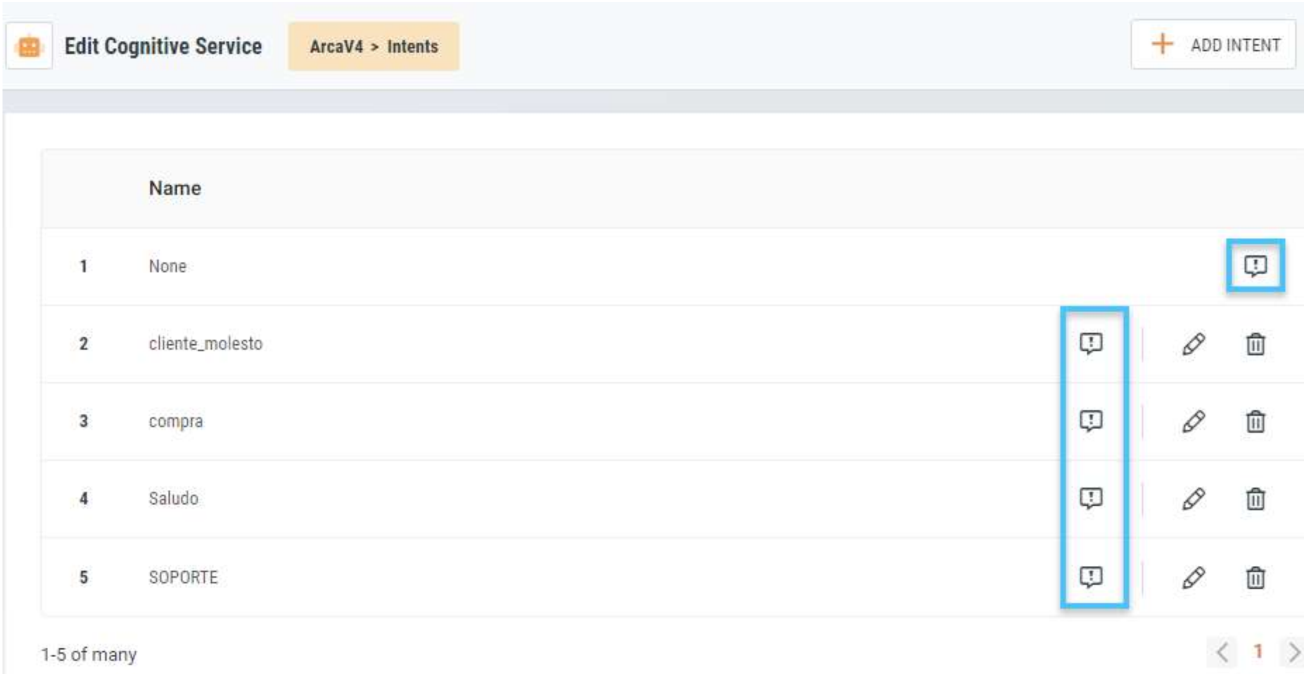
3. You will see the Cognitive Services viewer; locate the Service in which the intent you wish to train is located and click its ***"Edit"*** button.



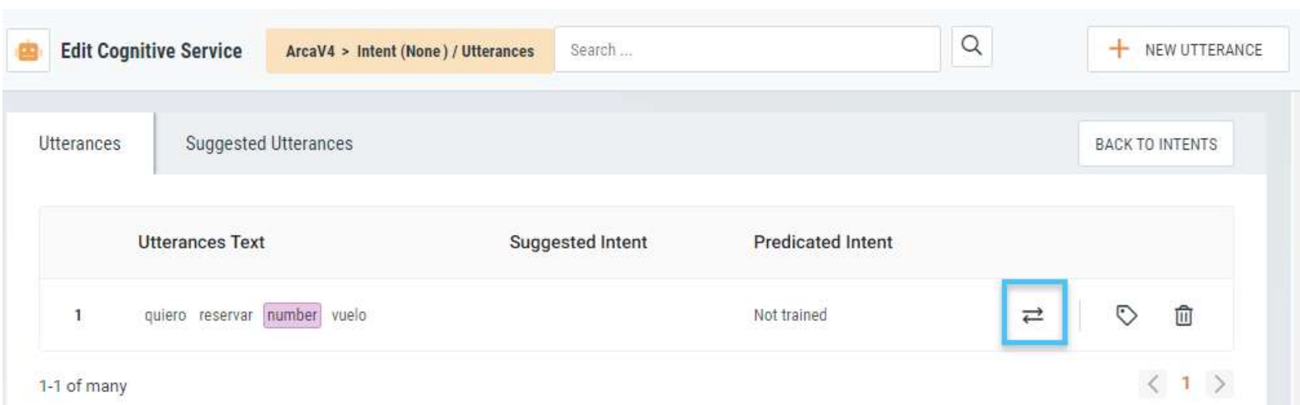
4. In the lower left corner of your screen, locate the *Cognitive Services* panel, then click on the ***"Intents"*** option.



5. You will now be in the Intents viewer of the selected Cognitive Service. To define an utterance, simply click the ***"Utterances"*** button associated with the intent that contains the *utterance* you wish to reassign.

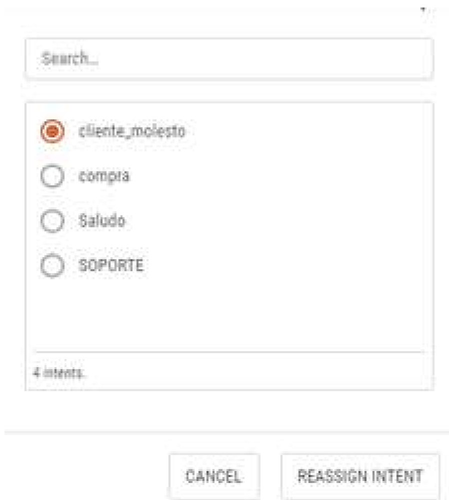


6. You will then see a list with all the utterances defined in the selected intent. To reassign one of them, click its **"*Reassign Intent*"** button.



7. Next, a window will appear listing all the intents associated with the Cognitive Service. Select the *intent* to which you wish to reassign the

utterance and click the ***"Reassign Intent"*** button



The utterance will disappear from the current list and appear in the list of utterances for the selected *intent*.

Related Articles

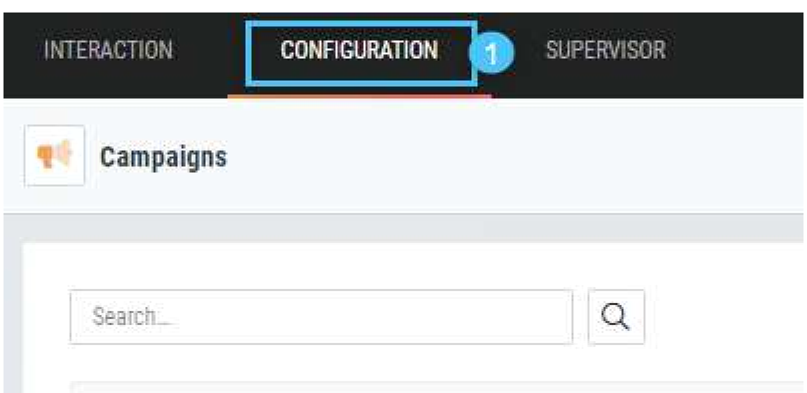
- User search
- How to set up Messenger messaging
- How to associate a YouTube account
- How to associate an application from Google Play Store
- How to associate an application from the App Store

How to remove utterances from an intent

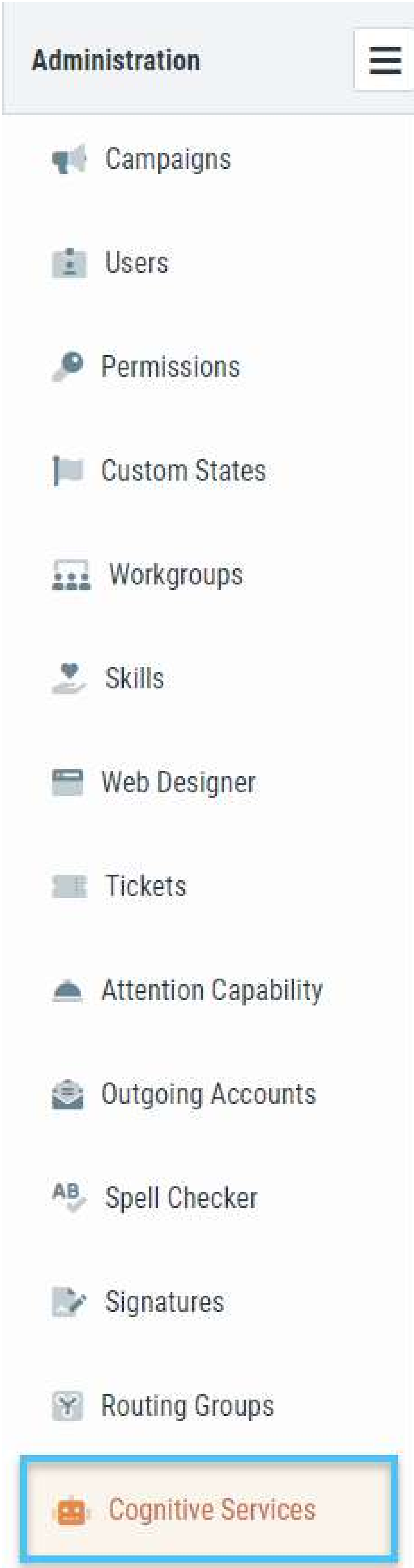
The following article shows you how to delete the utterances that you have defined in a particular intent.

To delete utterances previously defined in an intent:

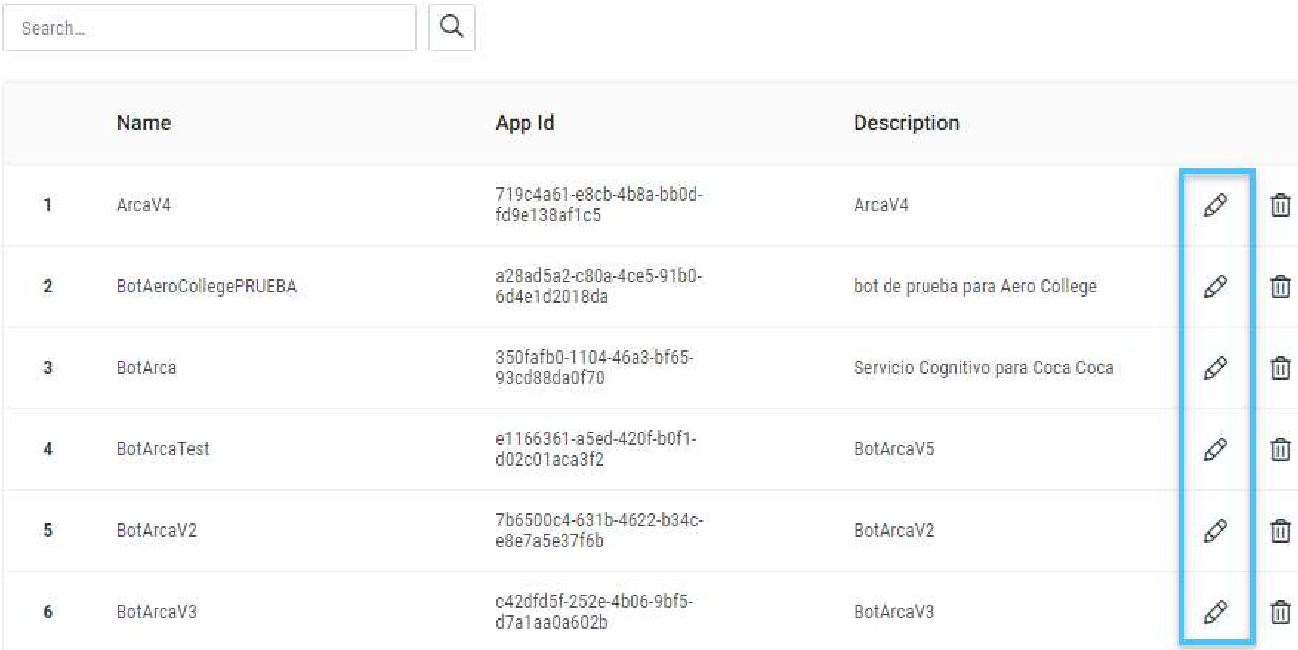
1. Go to the **"*Configuration*"** tab



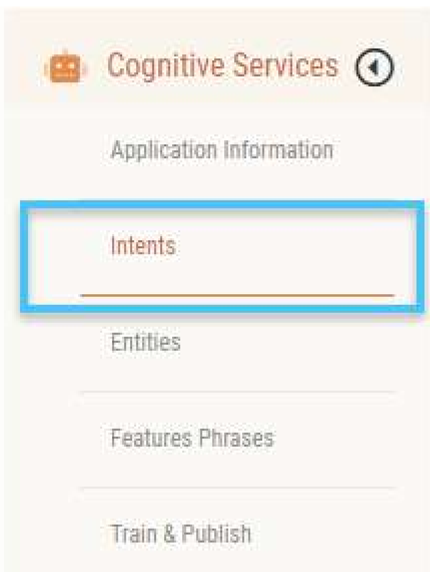
2. In the administration panel, locate the **"*Cognitive Services*"** option.



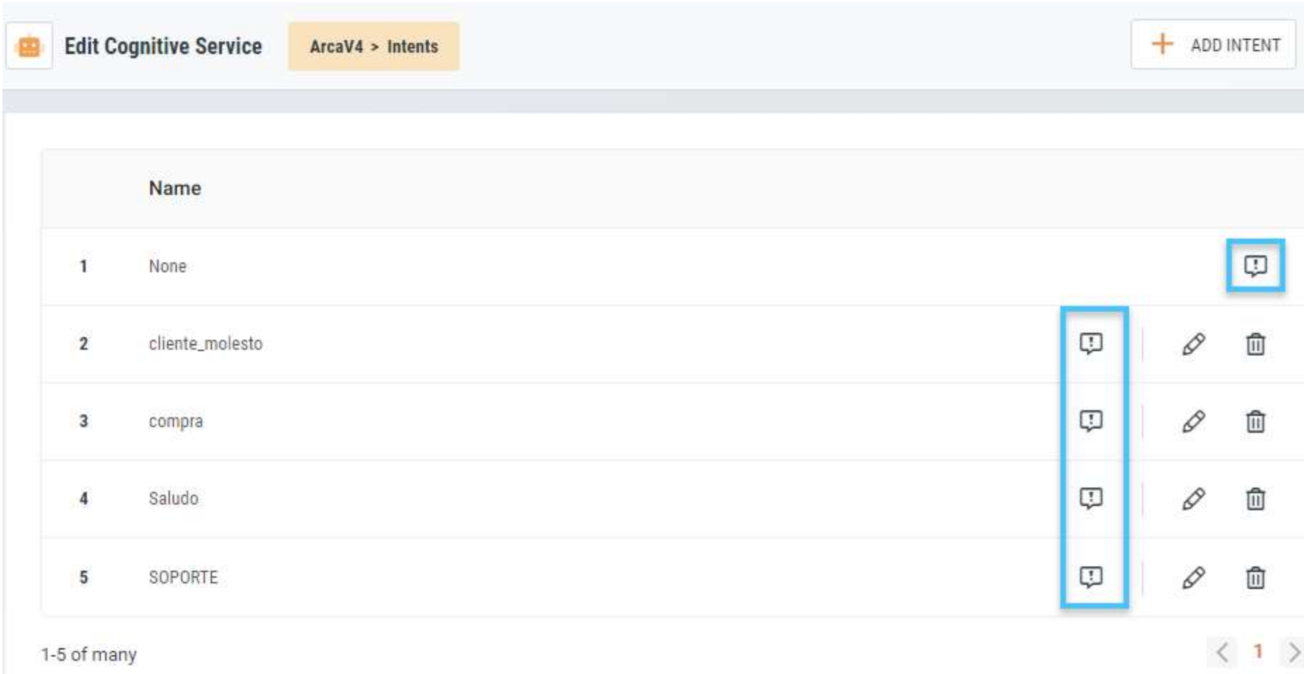
3. You will see the Cognitive Services viewer; locate the Service in which the intent you wish to train is located and click its ***"Edit"*** button.



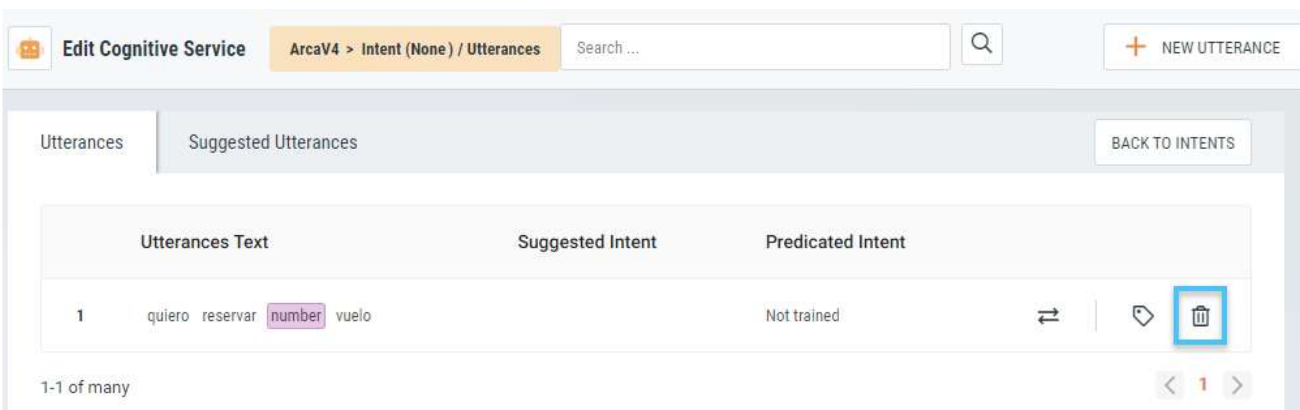
4. In the lower left corner of your screen, locate the *Cognitive Services* panel, then click on the ***"Intents"*** option.



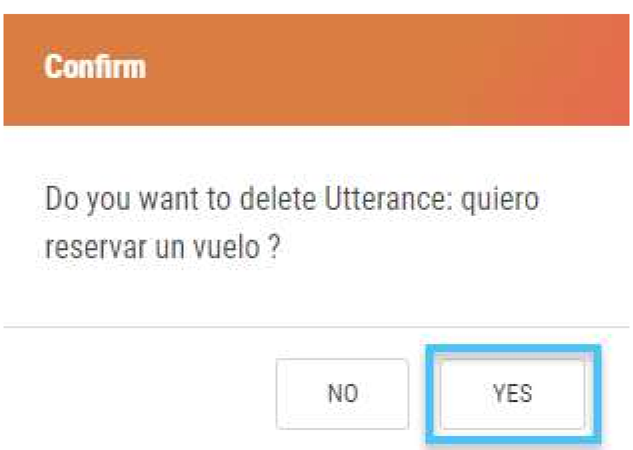
5. You will now be in the Intents viewer of the selected Cognitive Service. To define an utterance, simply click the ***"Utterances"*** button associated with the intent that contains the *utterance* you wish to reassign.



6. You will then see a list with all the utterances defined in the selected intent. To delete one of them, click the appropriate ***"Delete"*** button.



7. A confirmation window will then appear; click ***"Yes"*** to delete the utterance.



Related Articles

- User search
- How to set up Messenger messaging
- How to associate a YouTube account
- How to associate an application from Google Play Store
- How to associate an application from the App Store

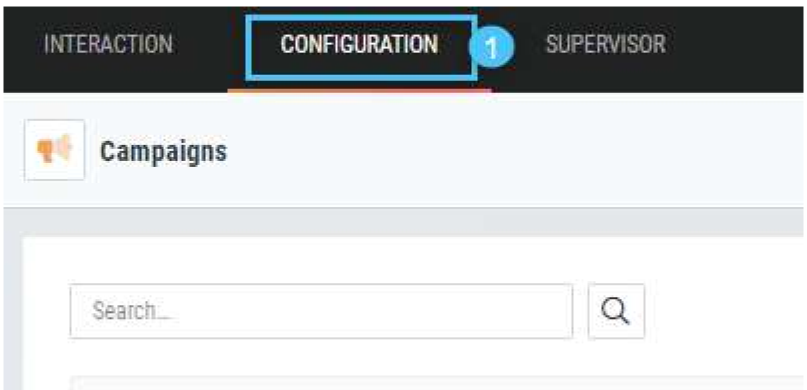
How to label (mark) entities within an utterance

The following article will show you how to label entities within a particular utterance.
In this way, LUIS will be able to obtain relevant data for the operation of the *Service* from the utterances.

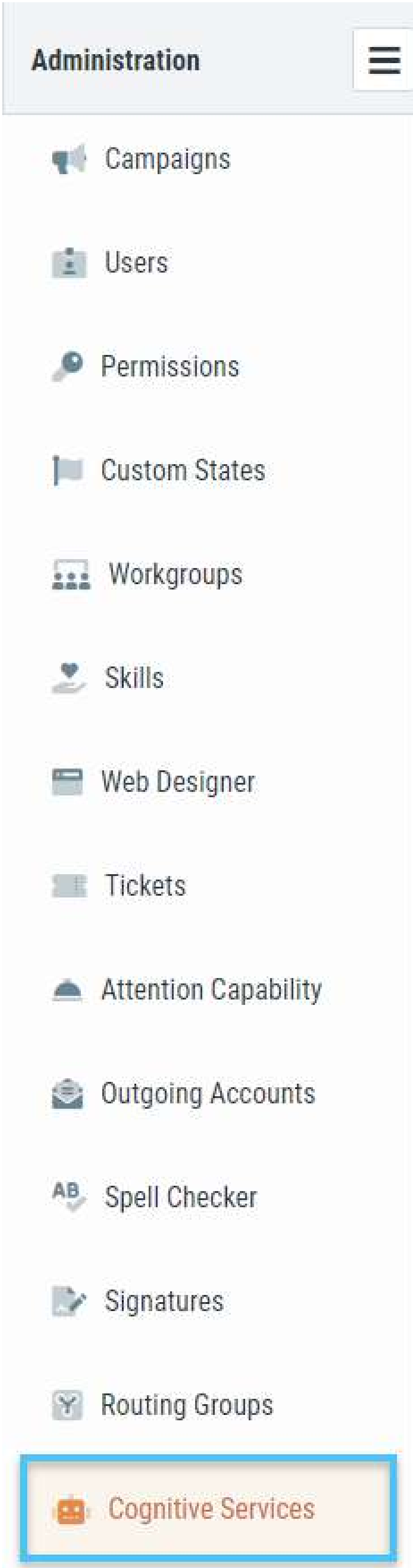
In other words, by labeling entities within an utterance you will indicate to LUIS that after certain words it must expect certain data (*entity*).

To label entities within an utterance:

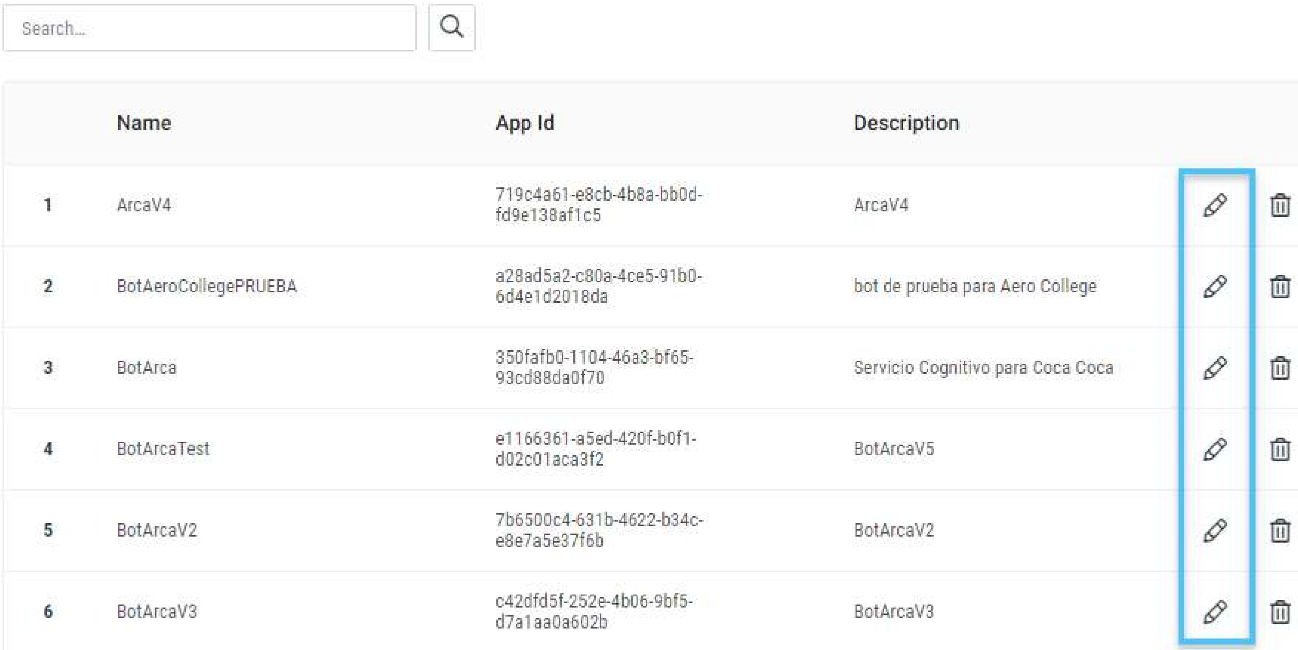
1. Go to the **"*Configuration*"** tab



2. In the administration panel, locate the **"*Cognitive Services*"** option.

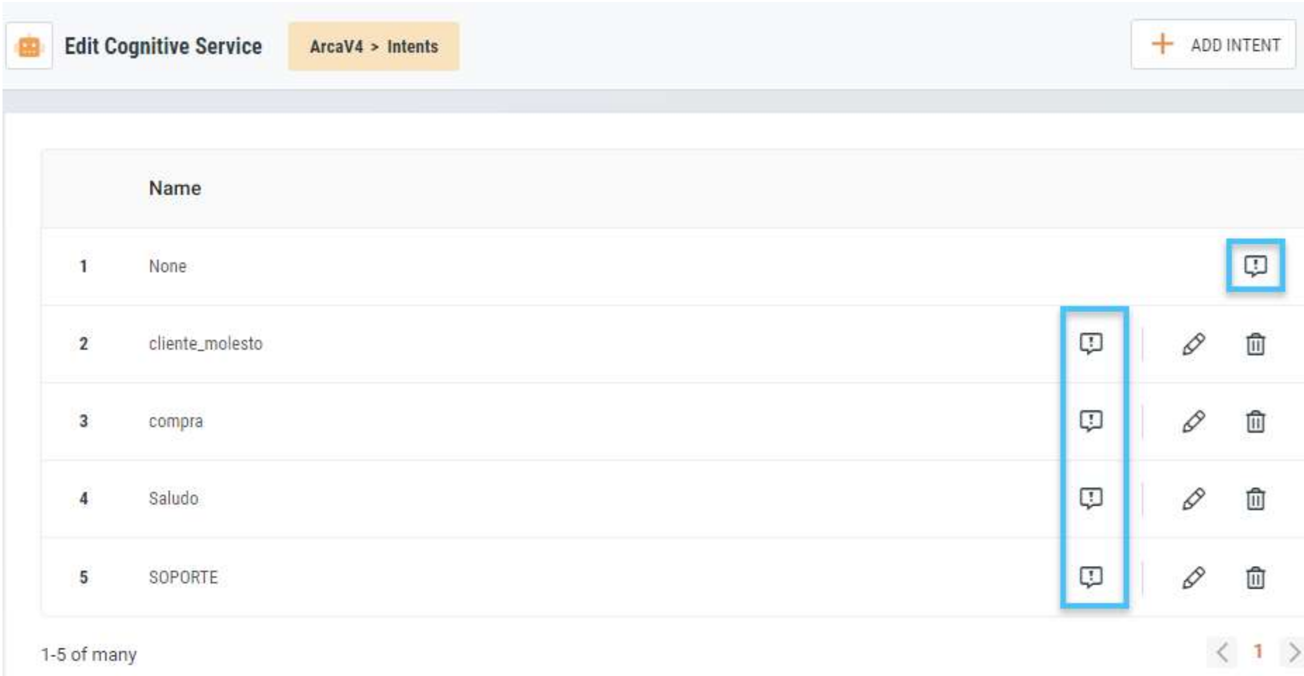


3. You will see the Cognitive Services viewer; locate the Service that contains the intent you wish to train and click its ***"Edit"*** button.

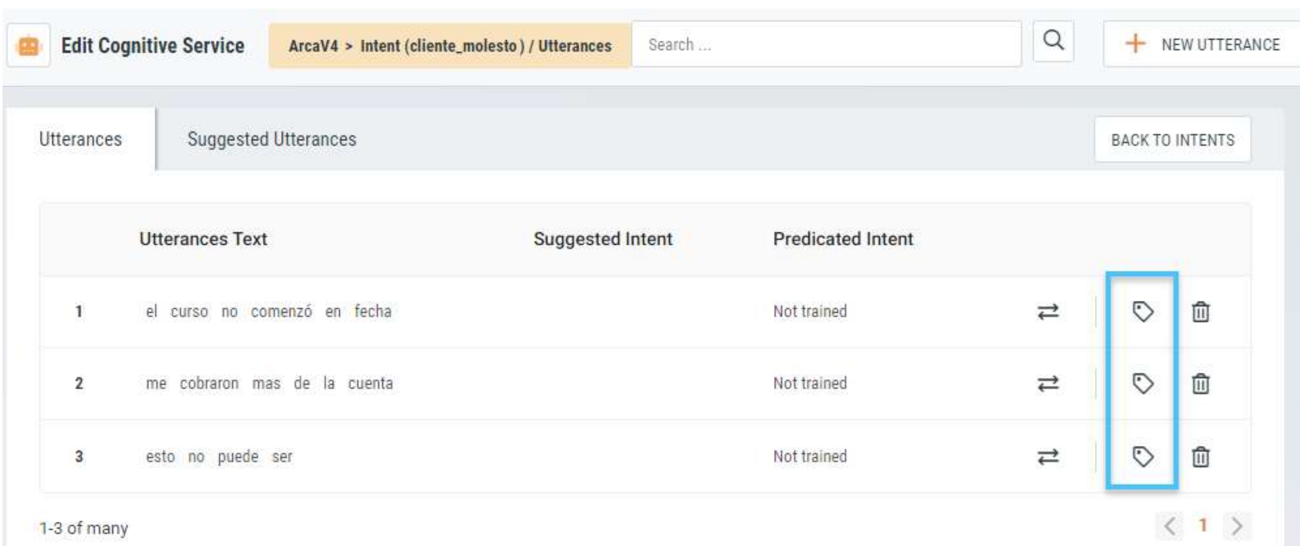


4. In the lower left corner of your screen, locate the *Cognitive Services* panel, then click on the ***"Intents"*** option.

5. You will now be in the Intents viewer of the selected Cognitive Service; click the ***"Utterances"*** button to see the list of utterances assigned to a particular intent.

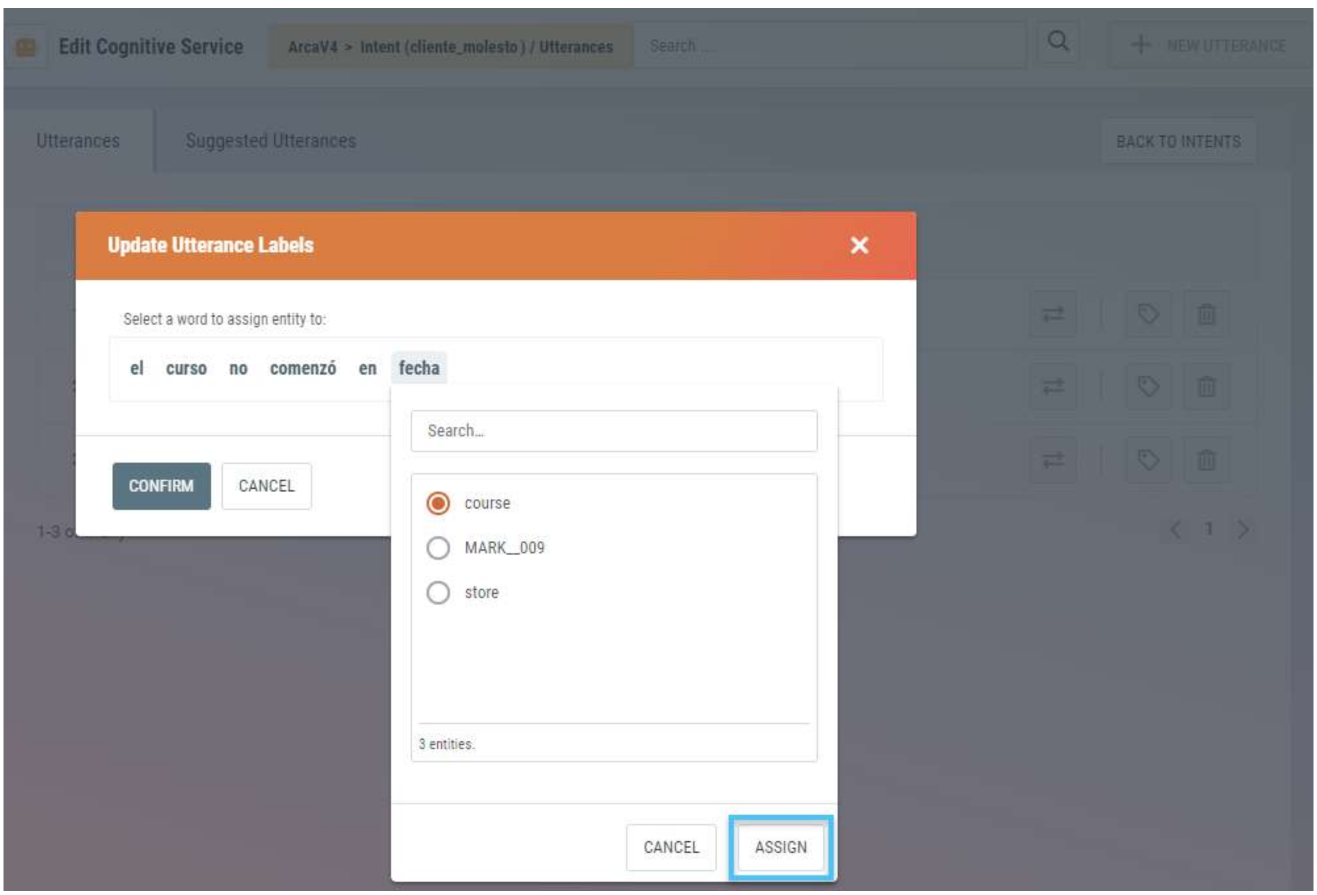


6. You will see a list with all the utterances assigned to the selected intent. Click the **"Labels"** button associated with the utterance in which you will label an entity.



7. A window will appear in which you will see the utterance separated word by word (including semicolons); click on the word or words you want to label.

8. A list of entities will then appear; assign the corresponding entity to the selected words and click the "Assign" button.



You can assign as many entities in an utterance as you see fit.

Related Articles

- User search
- How to set up Messenger messaging
- How to associate a YouTube account
- How to associate an application from Google Play Store
- How to associate an application from the App Store

How to define a new Features Phrases

The following article will show you how to define a new list of *features*.

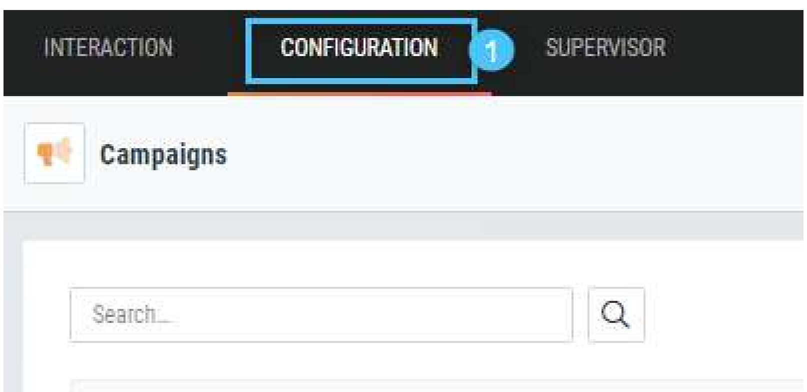
These lists include a group of values, that is, words or phrases, that belong to the same class and that must be treated in a similar way (cities or products, for example).

Note
Before defining your first list of *features*, we recommend reading and understanding the following articles:

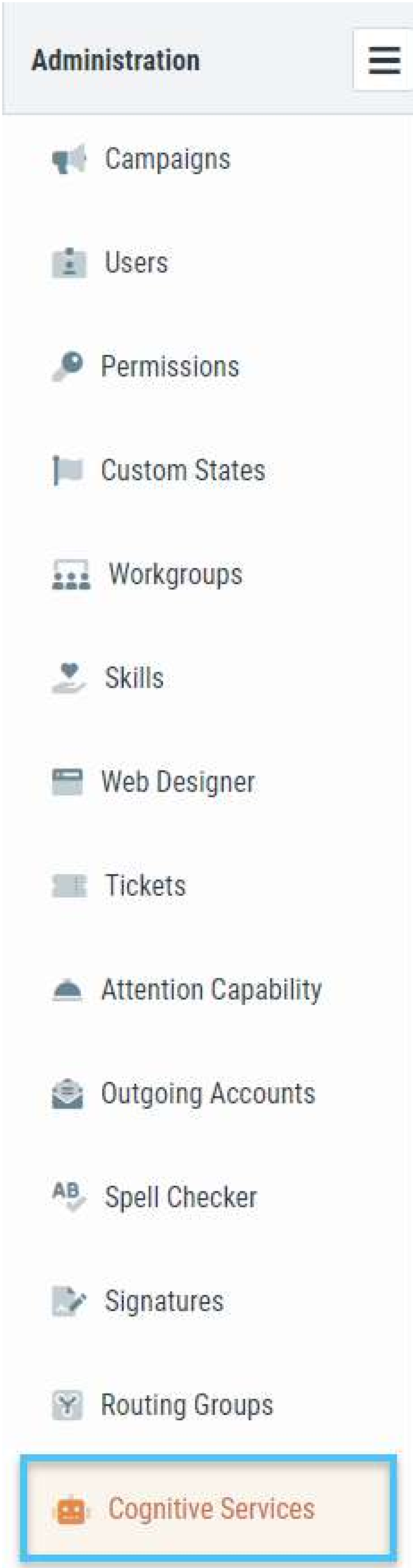
- What is a Cognitive Service and what is it for?
- What is an intent?
- What is an entity?
- What is an utterance?
- What are features phrases?

To define a list of *features*:

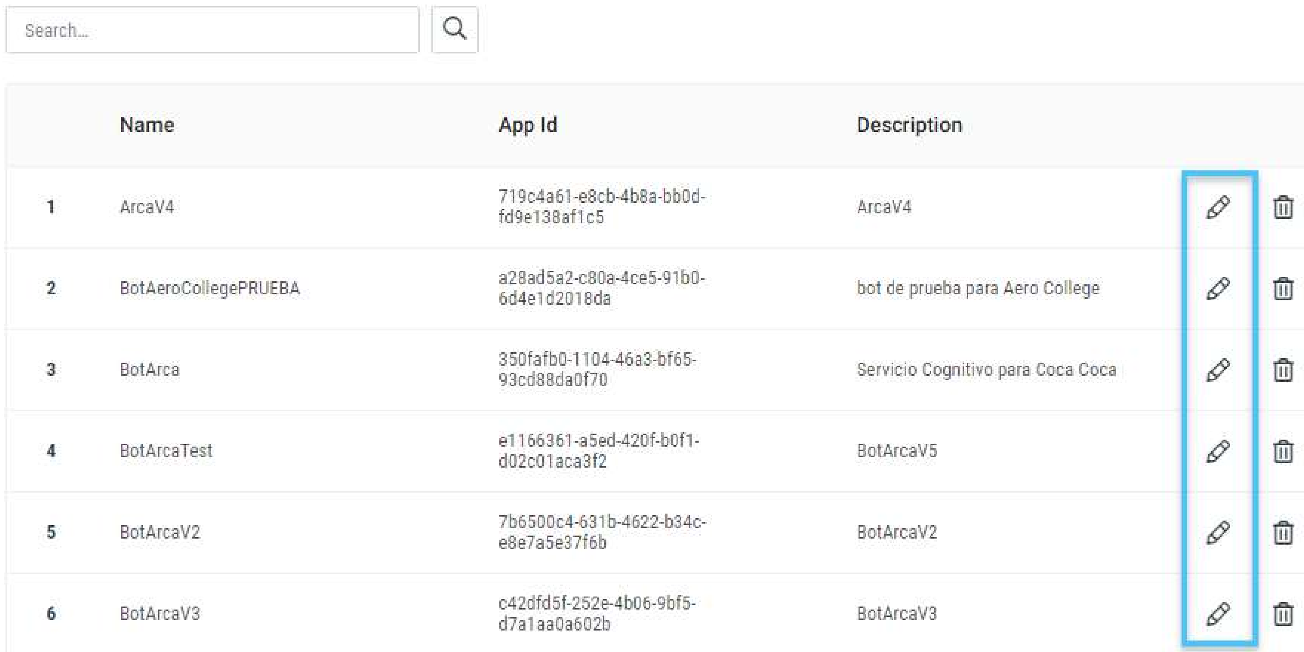
1. Go to the **"*Configuration*"** tab.



2. In the administration panel, locate the **"*Cognitive Services*"** option.


Administration
Campaigns
Users
Permissions
Custom States
Workgroups
Skills
Web Designer
Tickets
Attention Capability
Outgoing Accounts
Spell Checker
Signatures
Routing Groups
Cognitive Services

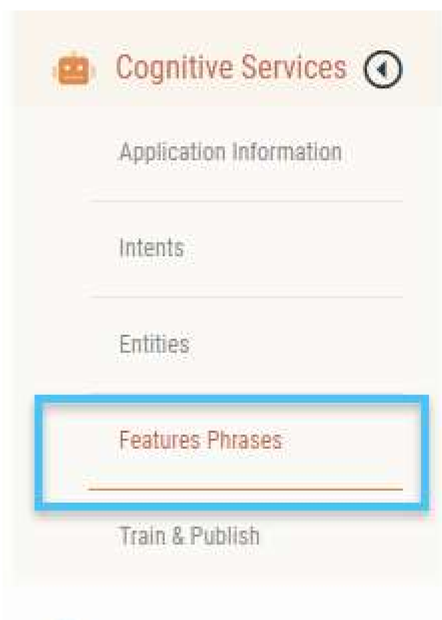
3. You will see the Cognitive Services viewer; locate the Service for which you wish to define an intent and click its ***"Edit"*** button.



Search...

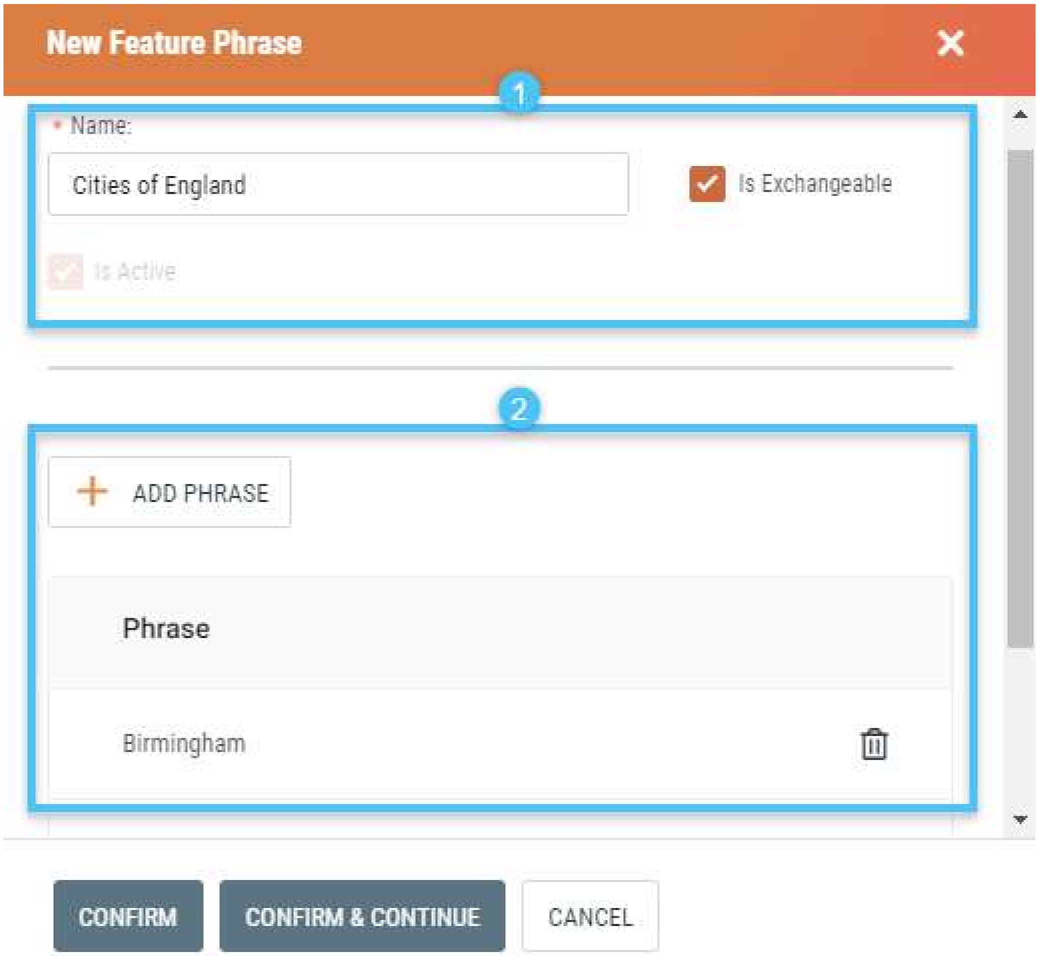
	Name	App Id	Description
1	ArcaV4	719c4a61-e8cb-4b8a-bb0d-fd9e138af1c5	ArcaV4
2	BotAeroCollegePRUEBA	a28ad5a2-c80a-4ce5-91b0-6d4e1d2018da	bot de prueba para Aero College
3	BotArca	350fafb0-1104-46a3-bf65-93cd88da0f70	Servicio Cognitivo para Coca Coca
4	BotArcaTest	e1166361-a5ed-420f-b0f1-d02c01aca3f2	BotArcaV5
5	BotArcaV2	7b6500c4-631b-4622-b34c-e8e7a5e37f6b	BotArcaV2
6	BotArcaV3	c42dfd5f-252e-4b06-9bf5-d7a1aa0a602b	BotArcaV3

4. In the lower left corner of your screen look for the *Cognitive Services* panel, then click on the option ***"Features".***



5. You will now be in the Features viewer of the selected Service. To define a new one, just click the "*New Feature*" button.

6. The following window will then appear.

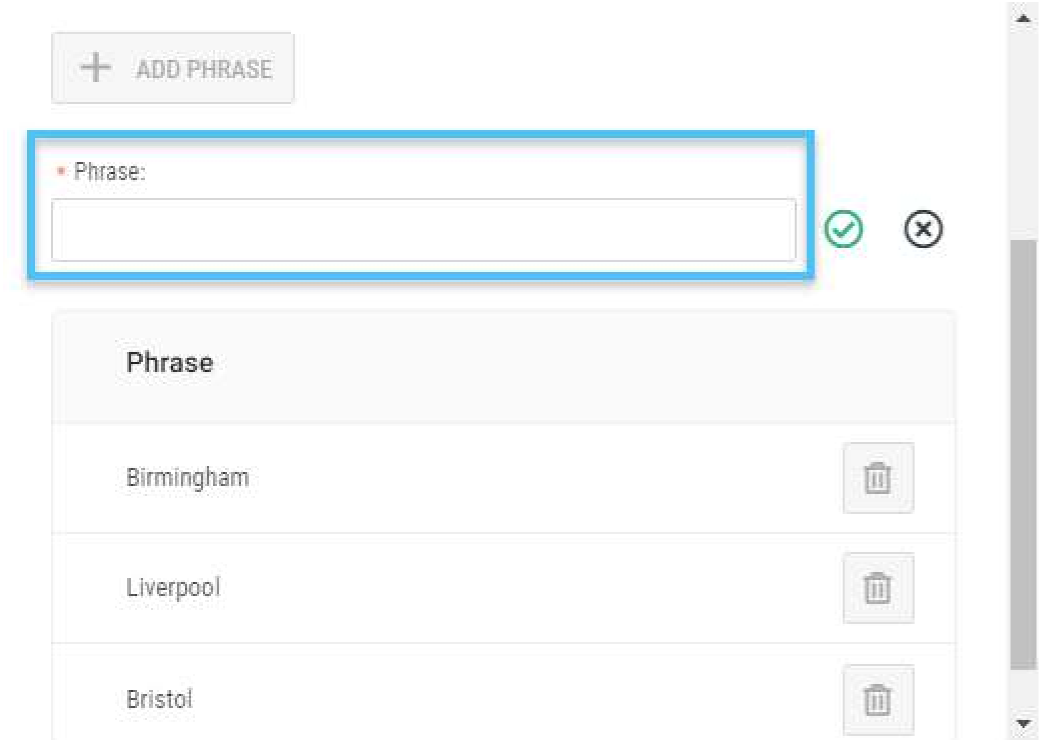


Name: Type the *features* list name by which they will be identified.

Is Exchangeable: Select this check box when the features list contains synonyms or words that, when changed to another word in the list, have the same intent and entity extraction.
If the box is unchecked, the Service will interpret that it is vocabulary specific to the application. It will interpret the features as not being synonymous or interchangeable (a particular country's slang, for example).

a. Click the ***"New Feature"*** button to define a new feature.

b. Type the phrase you want to add to the list as a feature.



i. If you only wish to define one *feature*, after typing the phrase click the **"Create"** button.

OCC will define the *feature* and will take you back to the Features viewer.

ii. If you wish to define more than one *feature*, after typing the phrase click the **"Create and Continue"** button.

In this case, OCC will define the *feature* in the same way but it will remain in the *feature* creation window so that you can continue defining as many phrases as you deem necessary for your *Service*.

7. To set the features, click the **"Create"** button.

Related Articles

- User search
- How to set up Messenger messaging
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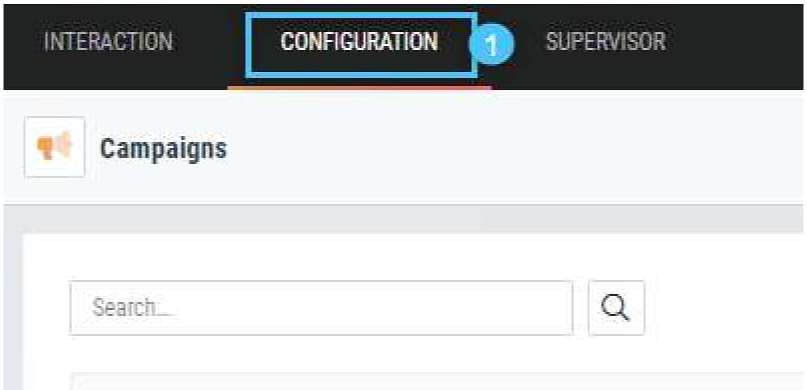
- How to associate an application from the App Store

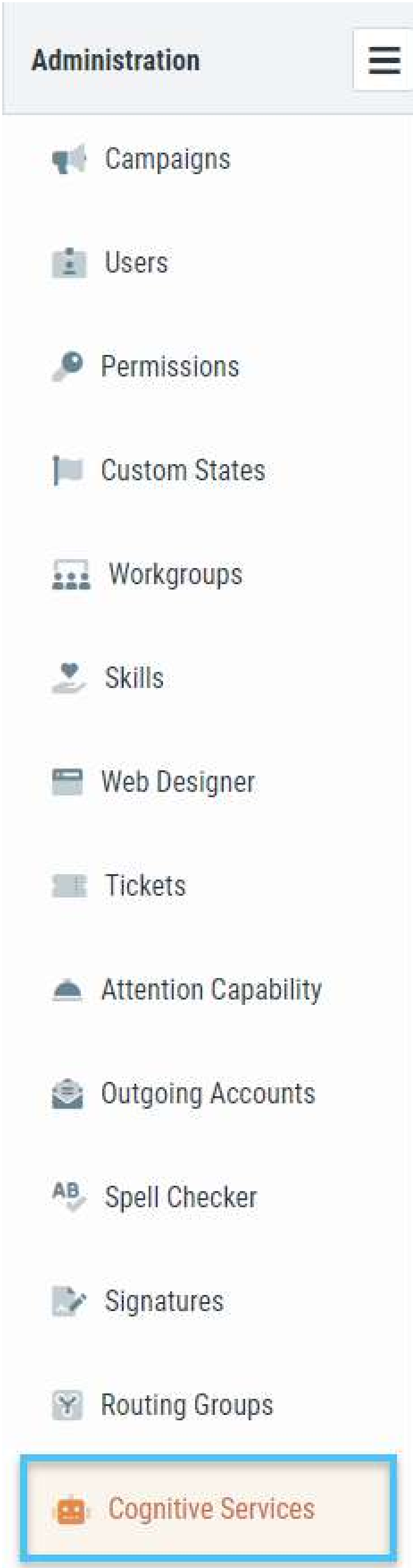
How to publish training and settings in the cognitive app

To publish training and settings in the cognitive app:

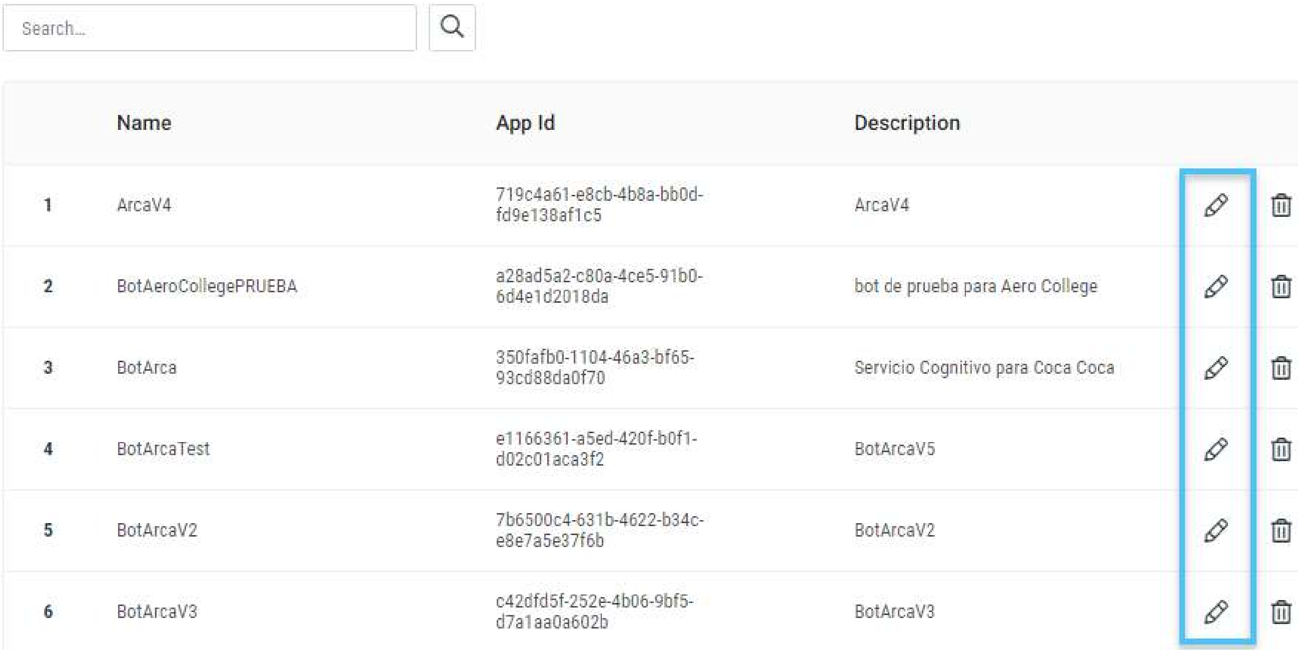
1. Go to the ***"Configuration"*** tab.



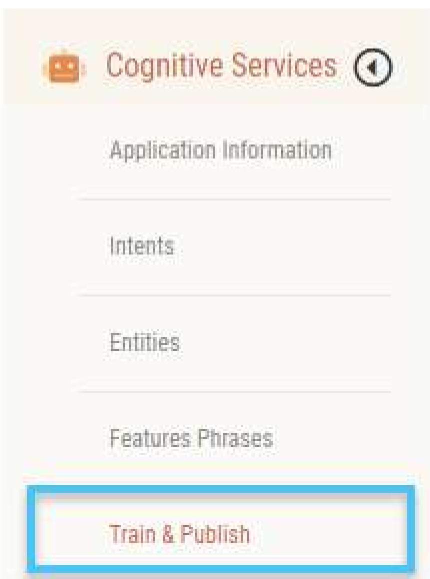
2. In the administration panel, locate the ***"Cognitive Services"*** option.



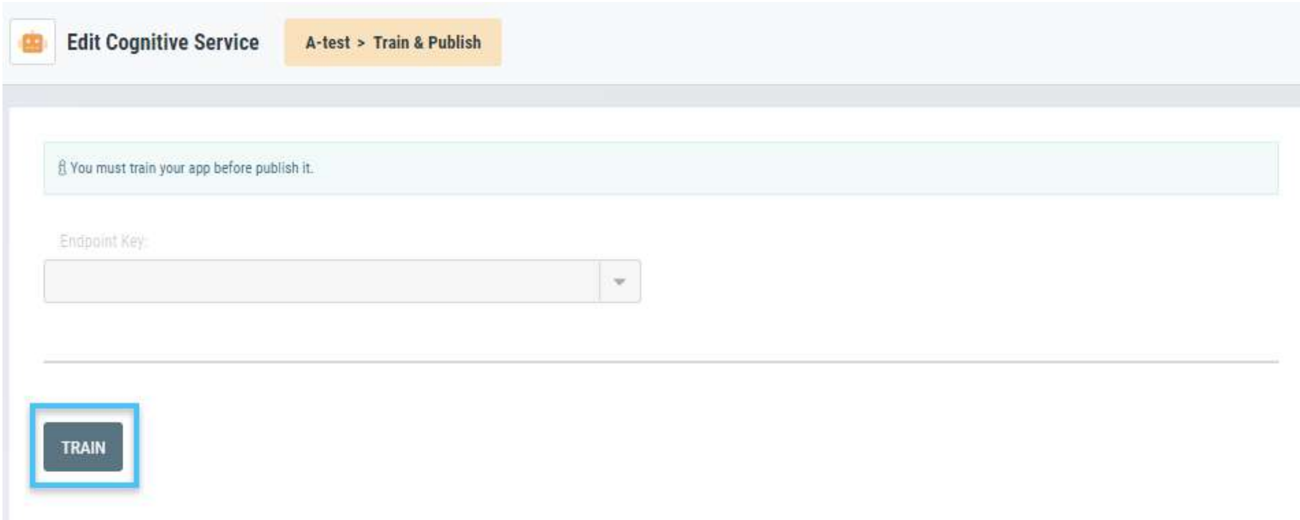
3. You will see the Cognitive Services viewer; locate the Service for which you wish to define an intent and click its ***"Edit"*** button.



4. In the lower left corner of your screen, locate the *Cognitive Services* panel, then click on the ***"Train & Publish"*** option.

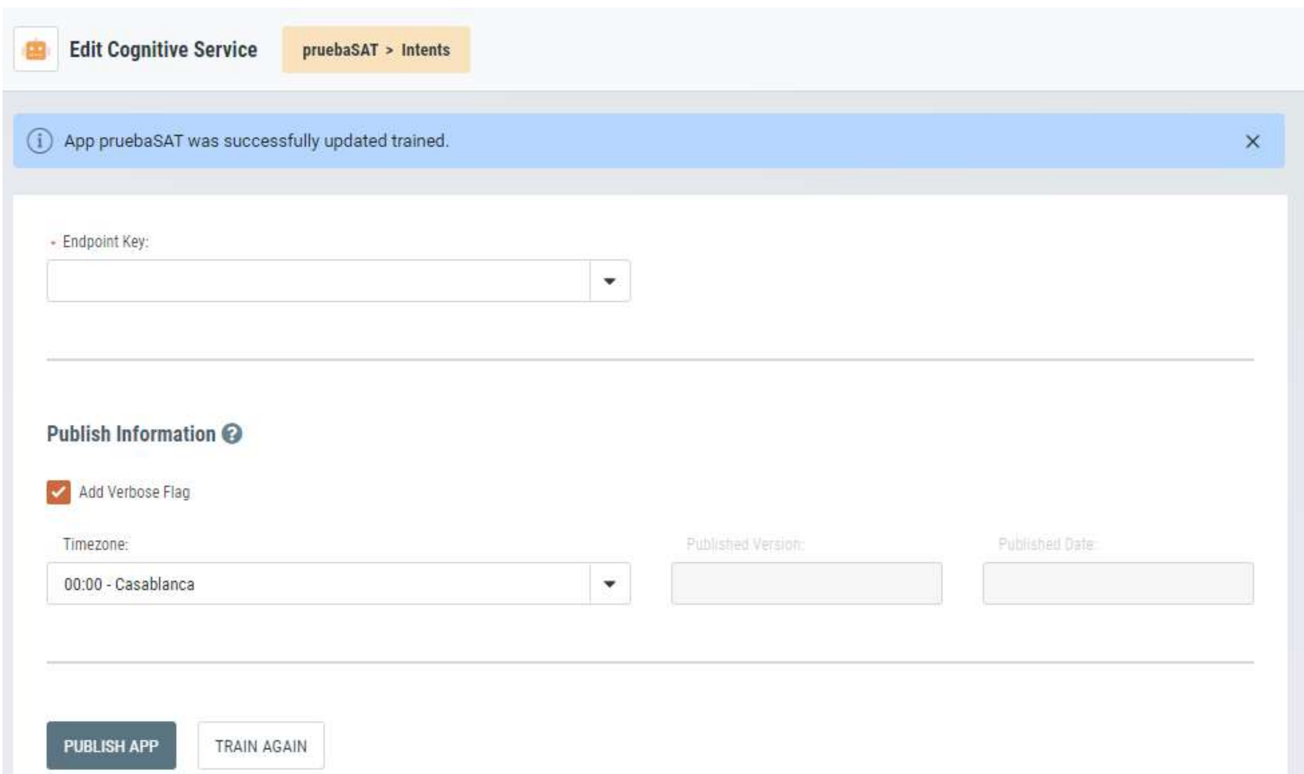


5. Next, click the ***"Train"*** button.



All intents must have at least one associated utterance.

6. You will then see the following on the screen.



Endpoint key:

1. **Subscription Key:** The Demo subscription key is a key that does not generate any cost when using it but has a limited balance per month. It should only be used for Demo environments or for the start of a client's operation until a paid subscription is obtained.
2. **Starter Key:** For paid subscriptions you must enter the Azure Subscriptions data (Account ID, Resource Group and Account Name) and the associated Subscriptions key.
These values will enable identification of each client's traffic for subsequent charging.

UI Add Verbose Flag: If this function is active, certain words related to the jargon of the *culture* indicated in the initial configuration will be loaded.

Time Zone: Select the *Service's* time zone.

7. Once the configuration is complete, click the ***"Publish"*** button.

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- How to set up Messenger messaging
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Custom States

- What are custom states?
- How to create a State
- How to edit a State
- How to delete a State

What are custom states?

Custom States are those created by the System Administrator, adjusted to be convenient for the disposition information that users need to view. Together with the predefined states of the system, these states will allow users to manage their disposition while they are logged into the Contact Center.

Defining Custom States enables reports to provide real information regarding the times and occupations of the users.

> Custom States are limited to accept new interactions, that is, the user who chooses to select one of the Custom States will not be available to attend new interactions; although they can manipulate interactions which are in progress and / or finished.

To create a custom state, you should read "How to create a state".

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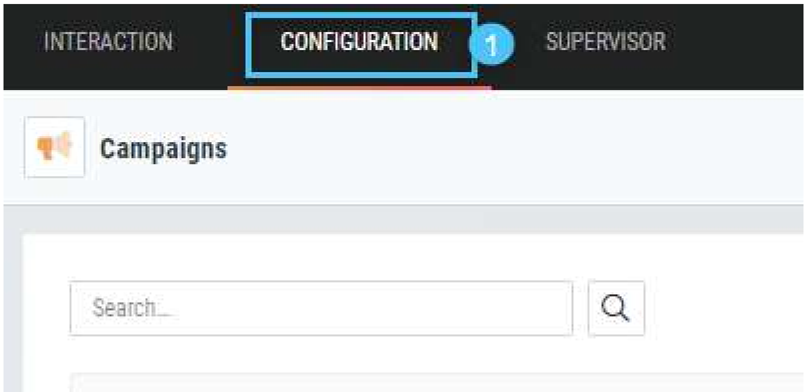
How to create a State

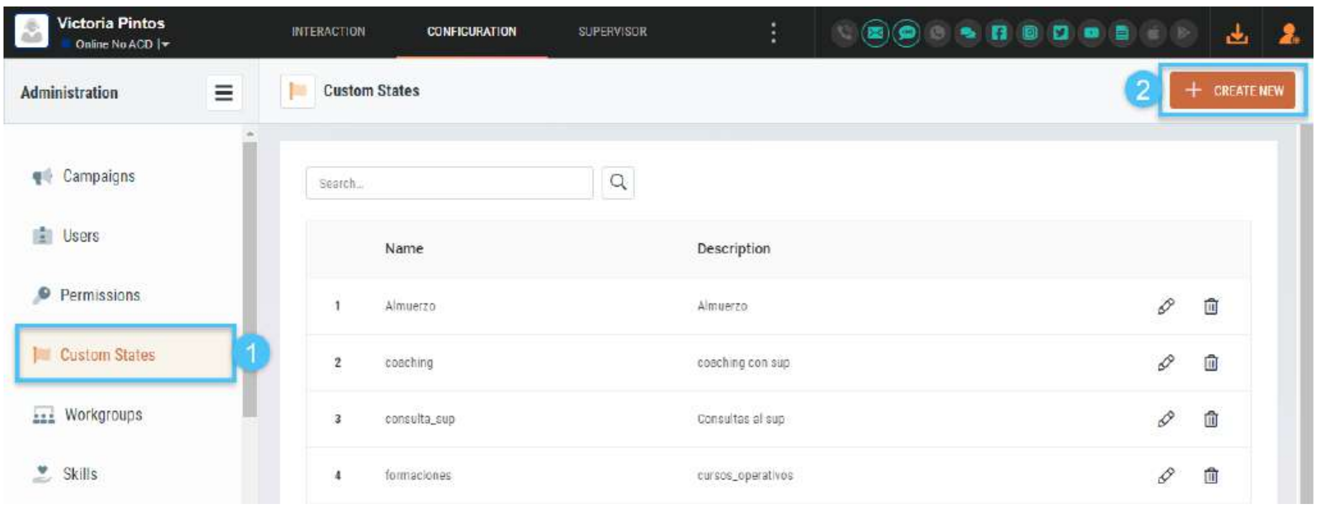
Creating a state, you can customize the disposition information that users need to view. By defining Custom States you will be able to further detail the information that the reports will provide regarding the times and occupations of the users.

To create a State:

1. Go to the "Configuration" tab:



2. Click on the "Custom States"  section and then click the "NEW STATE"  :



3. Enter the required data:

Name: identifier of the state in the system.

Description: description of the State in the system. This will appear in the drop-down list of states to select from.

Is Active: by checking this option, the agent will be able to use this state. If it is unchecked then it will not be a visible state for the agents.

Limit time: checking this box will limit the stay in the state, depending on the number of minutes entered (function available only in Allegro).

4. After completing all the required fields, click the "EDIT" button to create the custom state.
5. To cancel the operation without saving the entered data, click the "CANCEL" button.

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- User search
- How to set up Messenger messaging
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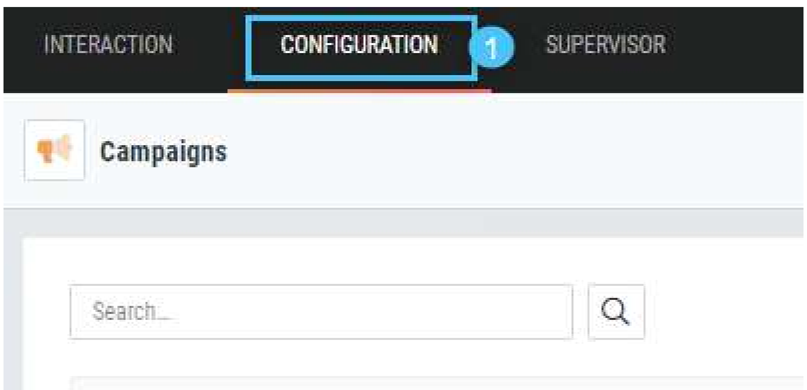
How to edit a State

You can edit a state to make modifications. This change will be taken by the state immediately, and users who are in that state will be notified of the update.

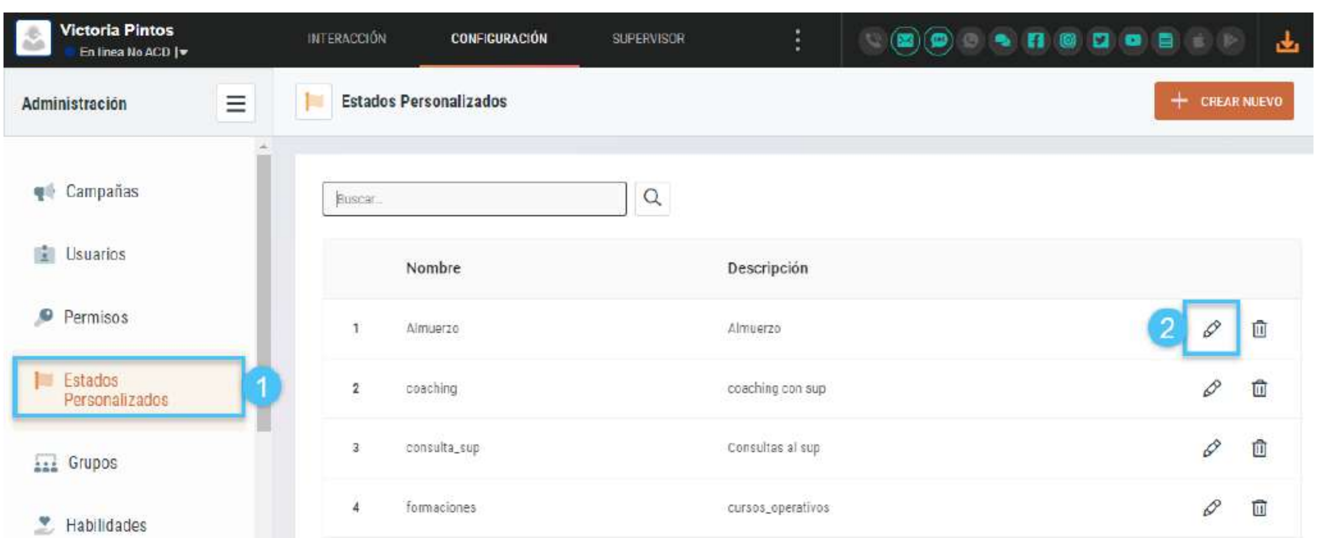
⚠ Only Custom States can be edited. The predefined states of the system cannot be edited.

To edit a State:

1. Go to the "Configuration" tab:



2. Click on the "Custom States" 1 section and then click the custom state "Edit" 2 button:



3. Make the necessary modifications:

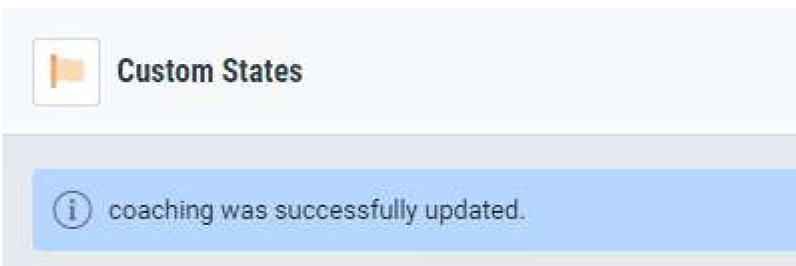
Description: description of the State in the system. This will appear in the drop-down list of states to select from.

Is Active:

Limit time: checking this box will limit the stay in the state, depending on the number of minutes entered.

The name of the custom state cannot be edited.

4. After making the modifications, click the "EDIT" button to save the changes in the state.
5. Users who are in the state which has been modified will be notified in the interface as follows:



6. To cancel the operation without saving any changes, click the "CANCEL" button.

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- User search
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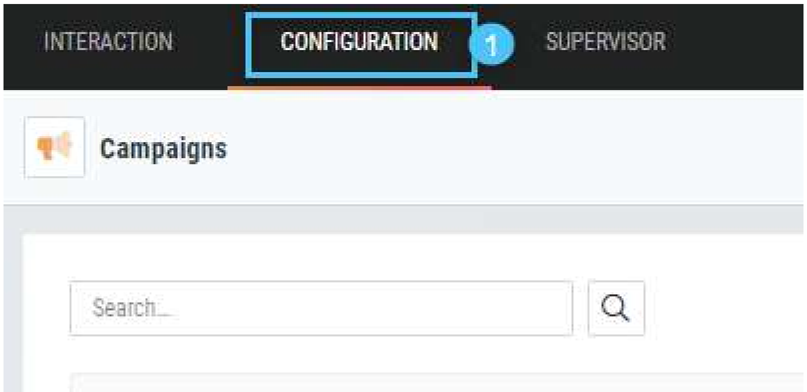
How to delete a State

If you don't want users to stay in a custom state, you can delete it. It should be noted that when deleting a custom state the users who are in that state will automatically be placed in another state.

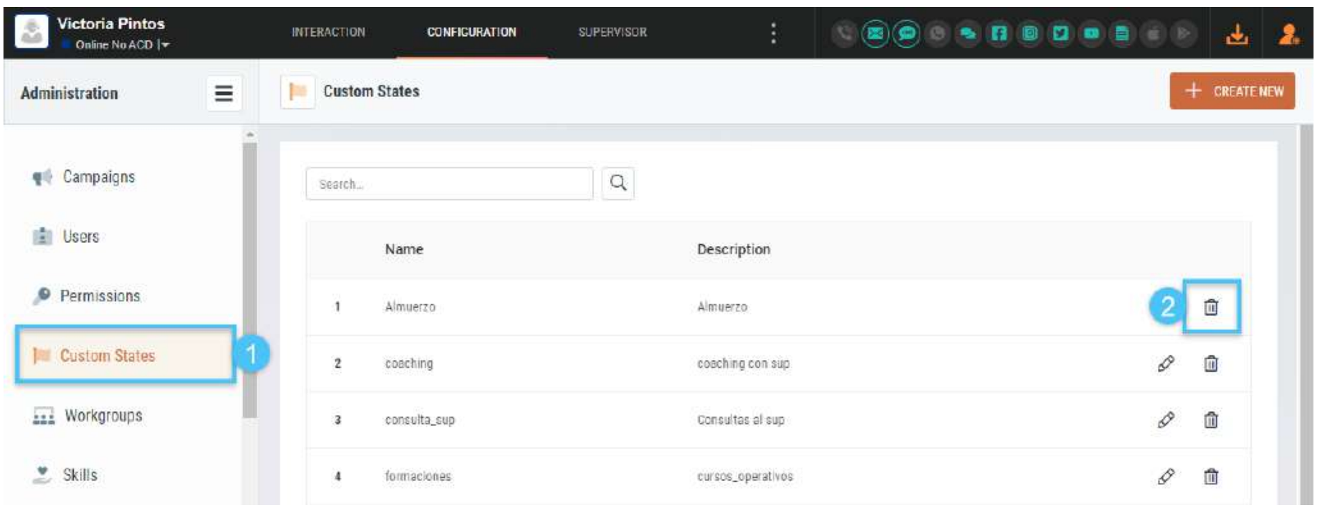
Only Custom States can be deleted. The predefined states of the system cannot be deleted.

To delete a State:

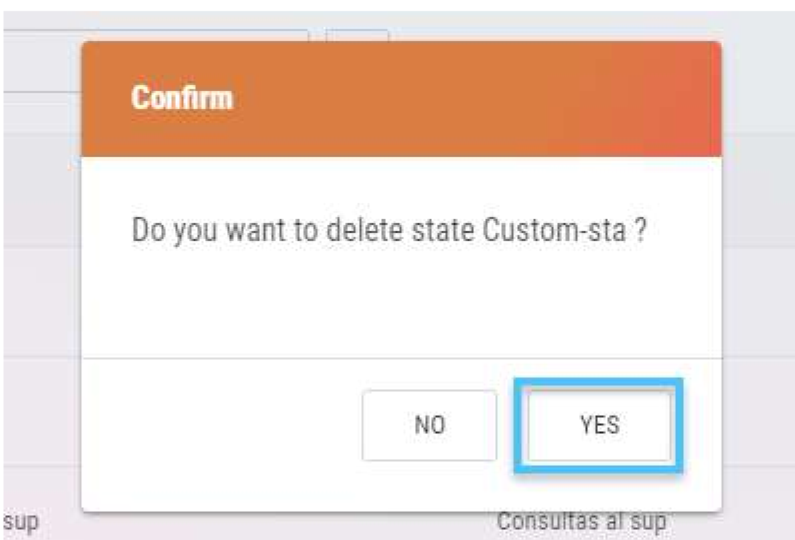
1. Go to the "Configuration" tab:



2. Click on the "Custom States" section ; and then click the "Delete" button of the custom state you want to delete :

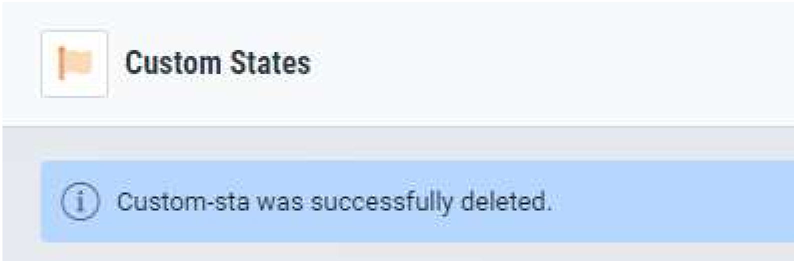


3. Click the "Yes" button to confirm the deletion of the custom state:



Users who are in this state will automatically be placed in another state.

4. A message is displayed to confirm the successful deletion of the custom state :



Related Articles

- User search
- How to set up Messenger messaging
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QnA Maker

- What is QnA Maker and what is it for?
- How to create a QnA Maker knowledge base
- How to add questions and answers to the QnA Maker knowledge base
- How to edit QnA Maker knowledge base questions and answers
- How to delete questions and answers from the QnA Maker knowledge base
- How to publish the QnA Maker knowledge base

What is QnA Maker and what is it for?

QnA Maker offers a *natural language processing* (NLP) service which, by making use of artificial intelligence, allows communication between the chatbot and humans through natural languages, such as English, Spanish, or Chinese.

It offers the possibility of generating a knowledge base associated with, among other things, FAQ pages, support websites, and product manuals, thus providing a collection of quick answers to certain situations.

Through the OCC interface, this tool can be consulted both by chatbots to generate automatic answers to certain frequently asked questions, for example, and by agents so that, from the previously configured knowledge base and according to the context of the interaction, they can find within it articles that are useful for the conversation.

Learn more about this service by visiting its official website.

Related Articles

- How to publish the QnA Maker knowledge base
- How to delete questions and answers from the QnA Maker knowledge base
- How to edit QnA Maker knowledge base questions and answers
- How to add questions and answers to the QnA Maker knowledge base
- How to create a QnA Maker knowledge base

How to create a QnA Maker knowledge base

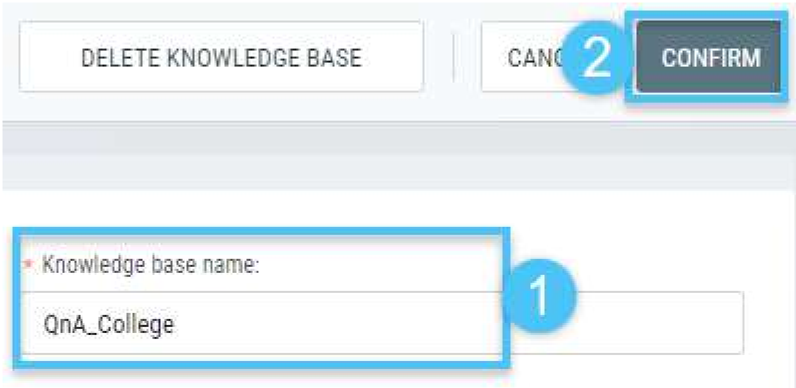
Creating a QnA Maker knowledge base makes it possible to configure certain FAQs and their answers that can be later used by chatbots to provide automatic responses or by agents to provide quick responses in certain contexts.

Creating the knowledge base requires User-level permissions.

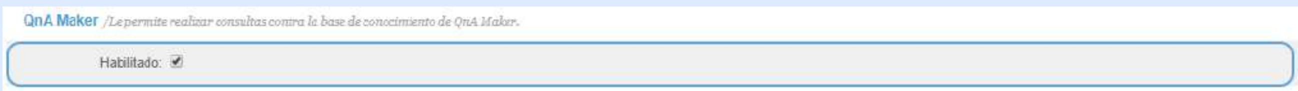
Follow these steps to create a QnA Maker knowledge base in OCC:

1. Go to the "*QnA Maker*" section located on the left-hand side of your screen.

2. Type a name for the knowledge base  and click the "*CREATE*" button .



After creating the knowledge base, it is possible to enable integration with QnA Maker in each account's settings; see How to edit an account.



Related Articles

- How to publish the QnA Maker knowledge base
- How to delete questions and answers from the QnA Maker knowledge base
- How to edit QnA Maker knowledge base questions and answers
- How to add questions and answers to the QnA Maker knowledge base
- How to create a QnA Maker knowledge base

How to add questions and answers to the QnA Maker knowledge base

After creating the QnA Maker knowledge base, it is possible to add pairs of questions and answers. These will be useful for the resolution of frequent queries or problems, either automatically through a chatbot or manually by an agent.

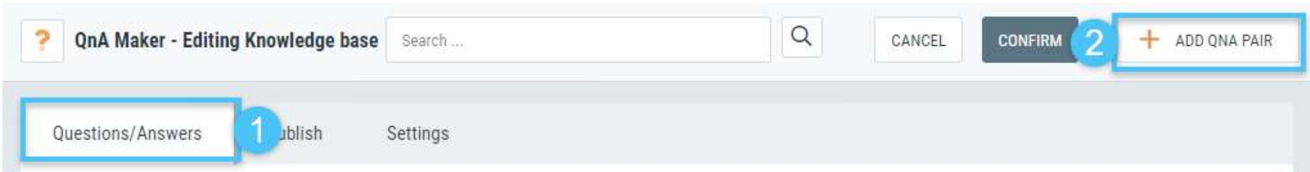
Follow these steps to add questions and answers to the QnA Maker knowledge base created in OCC:

1. Go to the "*QnA Maker*" section located on the left-hand side of your screen.

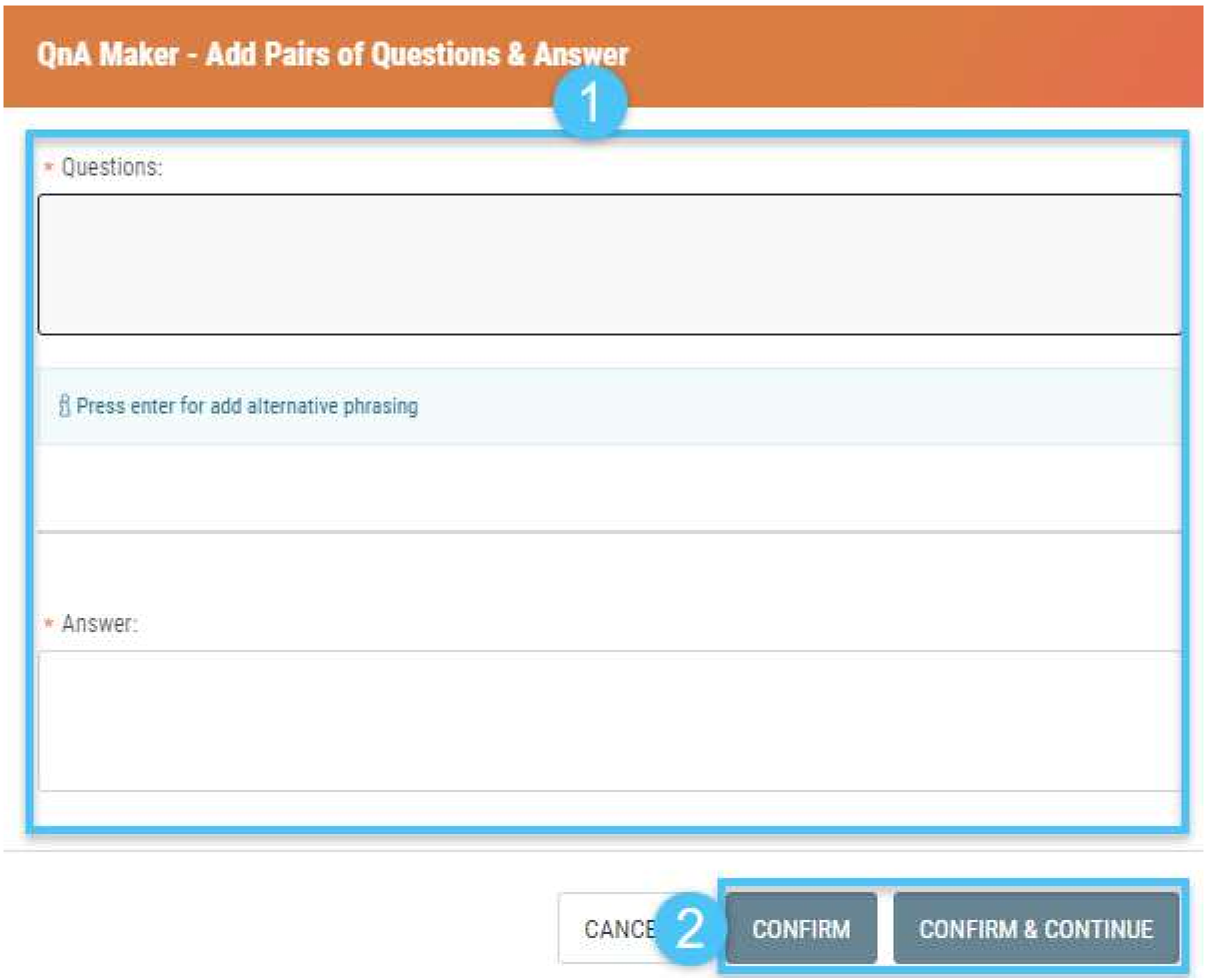
2. From the "*EDIT*" tab 

, click the "*ADD QNA PAIR*" button " 

.

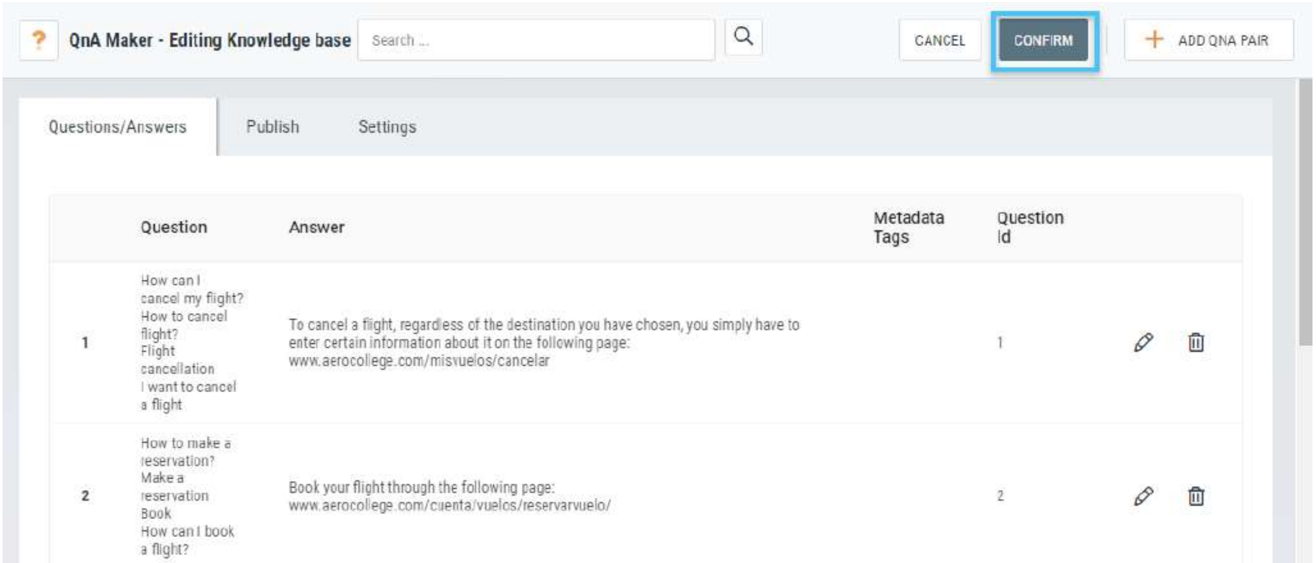


3. Type the question(s) and their possible answer  , then click the "ADD" button to return to the menu or the "ADD & CONTINUE" button to add another questions-and-answer pairing  .



All possible *questions* or *phrases* to which the *answer* applies are proposed, separated by "*Enter*".

4. After adding all the questions you deem necessary, click the *"UPDATE AND TRAIN*" button



After updating and training, the pair will be assigned a valid "*Question ID*".

After creating questions and answers, you must publish the knowledge base created so that they can be used

Related Articles

- How to publish the QnA Maker knowledge base
- How to delete questions and answers from the QnA Maker knowledge base
- How to edit QnA Maker knowledge base questions and answers
- How to add questions and answers to the QnA Maker knowledge base
- How to create a QnA Maker knowledge base

How to edit QnA Maker knowledge base questions and answers

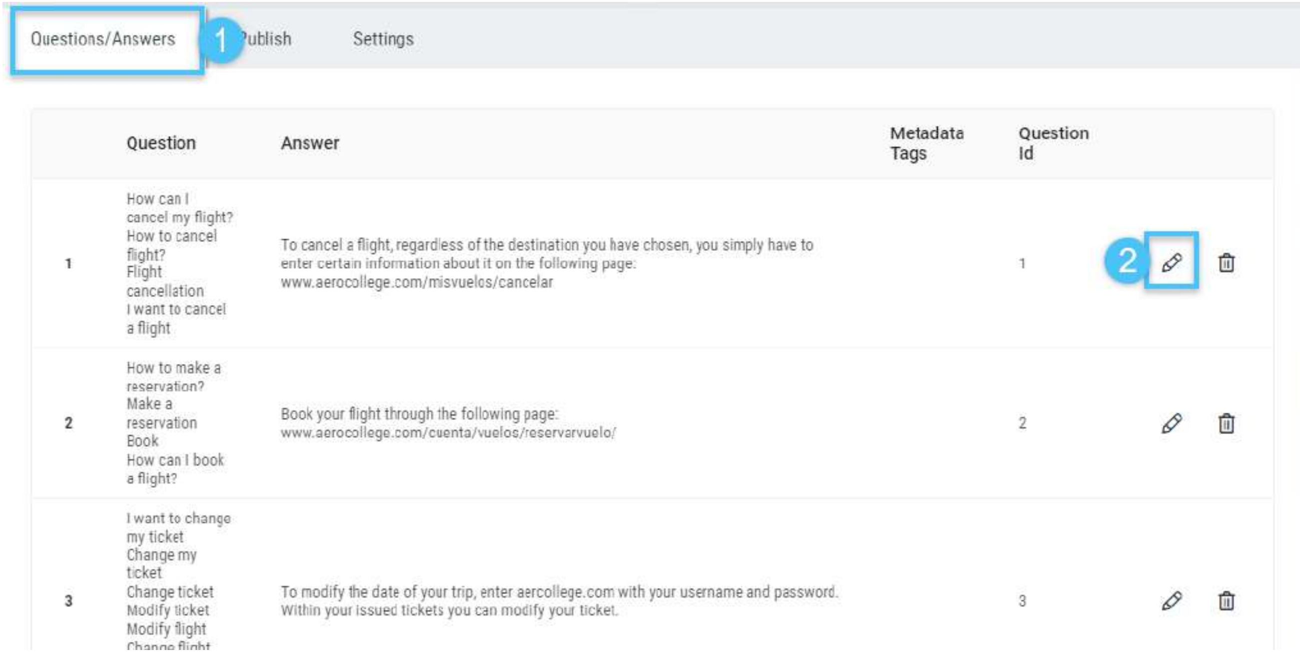
Due to the potential changes that occur, it is likely that at some point it will be necessary to edit some (or all) of the question-and-answer pairs associated with the integrated QnA Maker knowledge base.

In this way, the operation will be kept up to date and the effectiveness of the agents or chatbots that use these responses will be greater

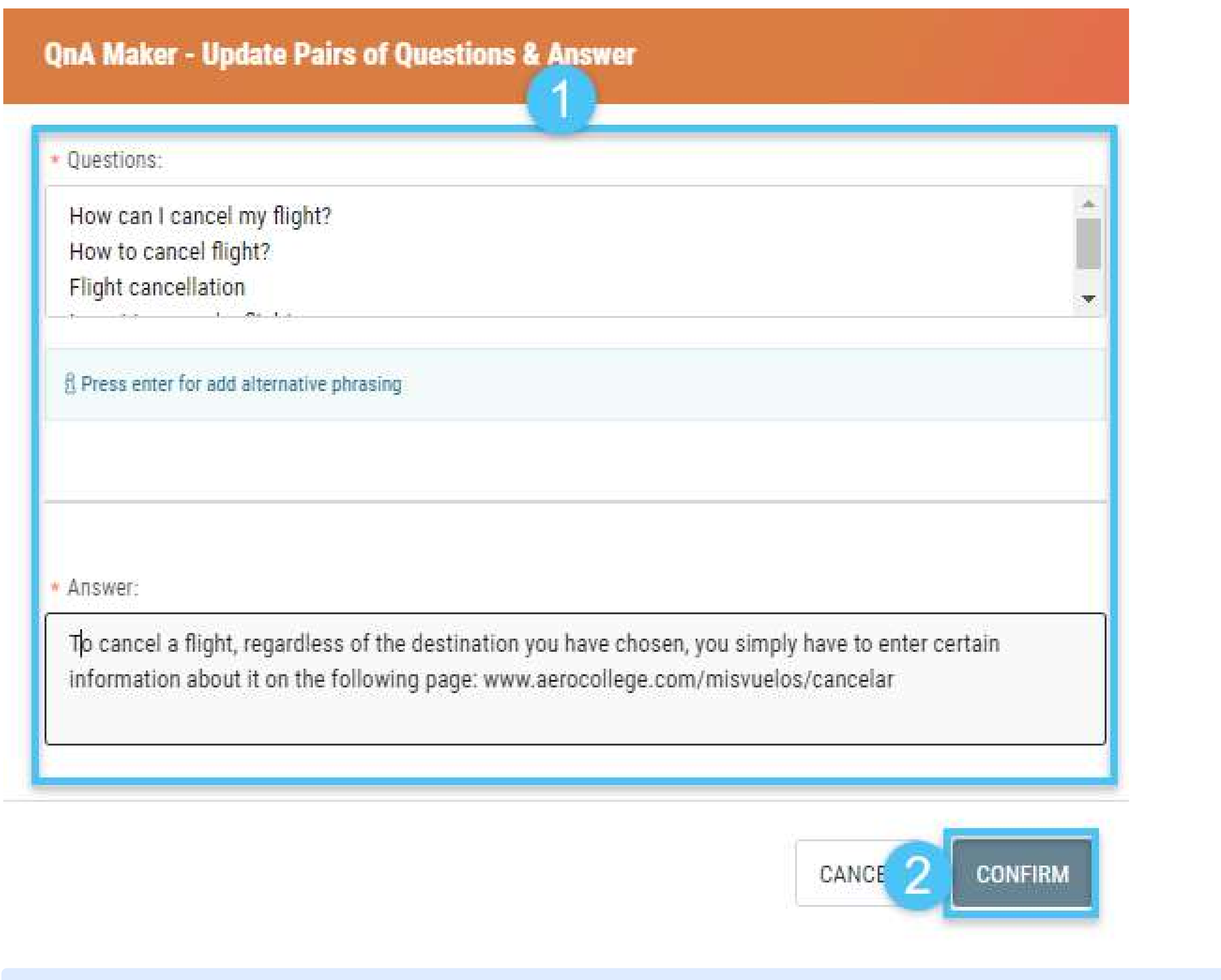
Follow these steps to edit questions and answers in the QnA Maker knowledge base created in OCC:

1. Go to the "*QnA Maker*" section located on the left-hand side of your screen.

2. From the "*EDIT*" tab 1 click the "*Edit*" button associated with the question and answer you wish to modify 2 .

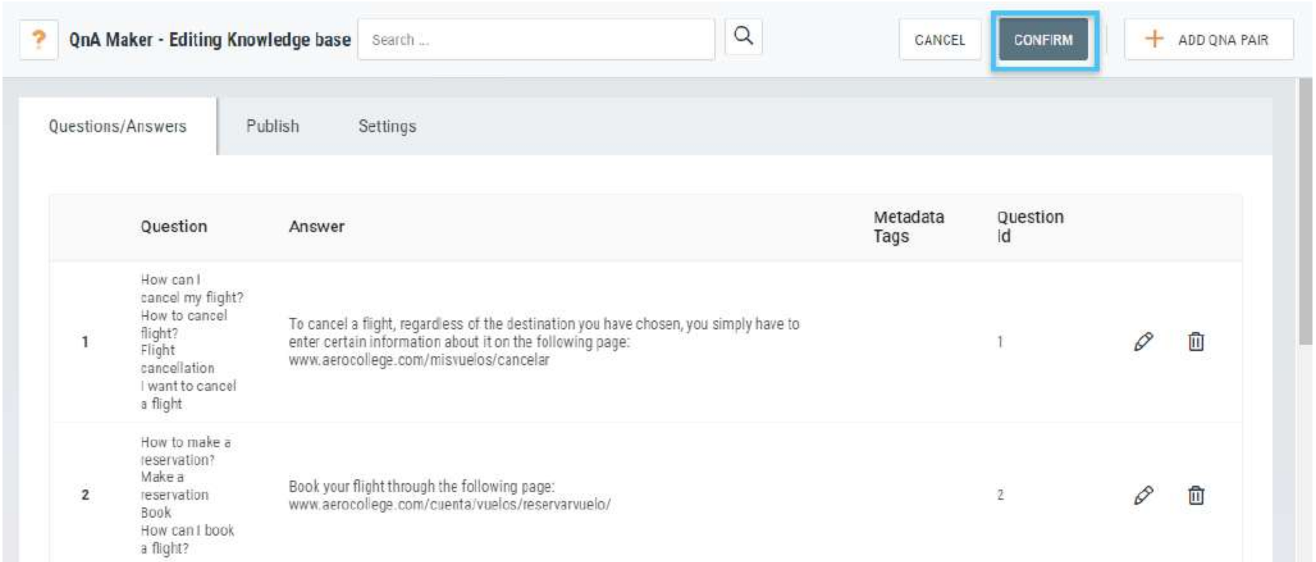


3. Edit the question(s) and the possible answer 1, then click the *"UPDATE"* button 2.



All possible *questions* or *phrases* to which the *answer* applies are proposed, separated by "*Enter*".

4. After editing all the question and answer pairs you deem necessary, click the *"UPDATE AND TRAIN"* button.



After editing questions and answers, you must publish the knowledge base so that the published version of the database is updated.

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- How to set up Messenger messaging
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- How to associate an application from the App Store

How to delete questions and answers from the QnA Maker knowledge base

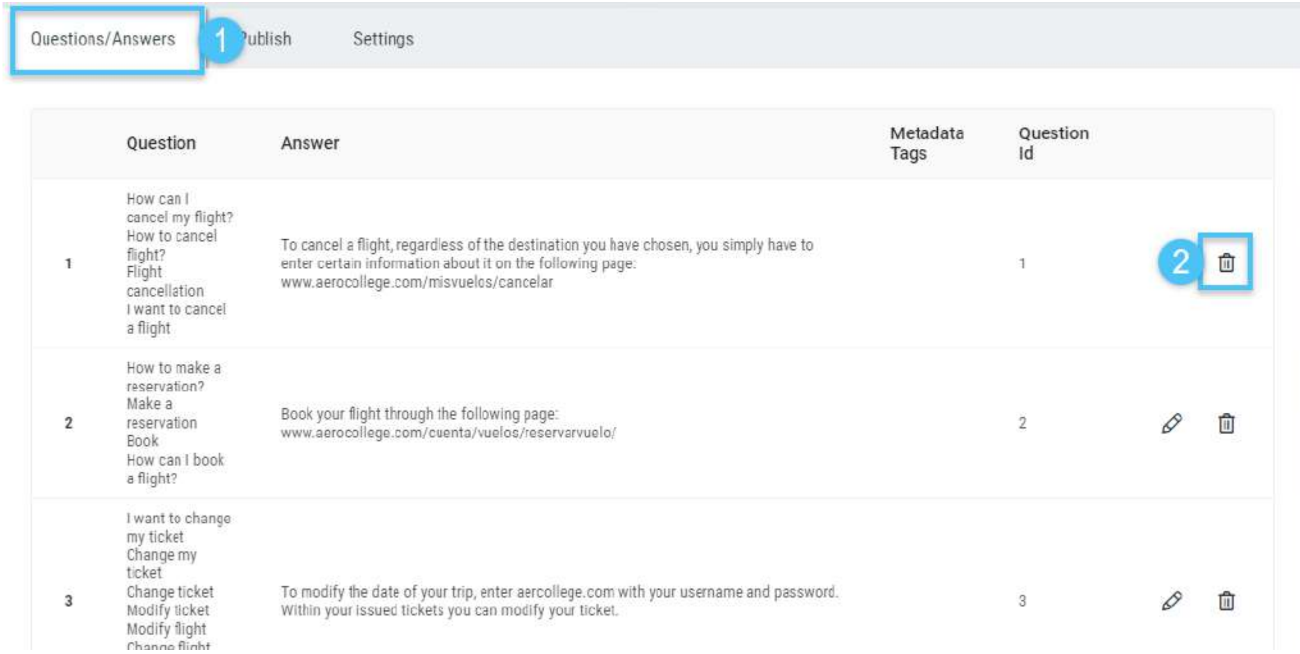
Due to potential changes that occur, it is likely that at some point it will be necessary to delete some (or all) of the question-and-answer pairs associated with the integrated QnA Maker knowledge base.

This will keep the operation up to date.

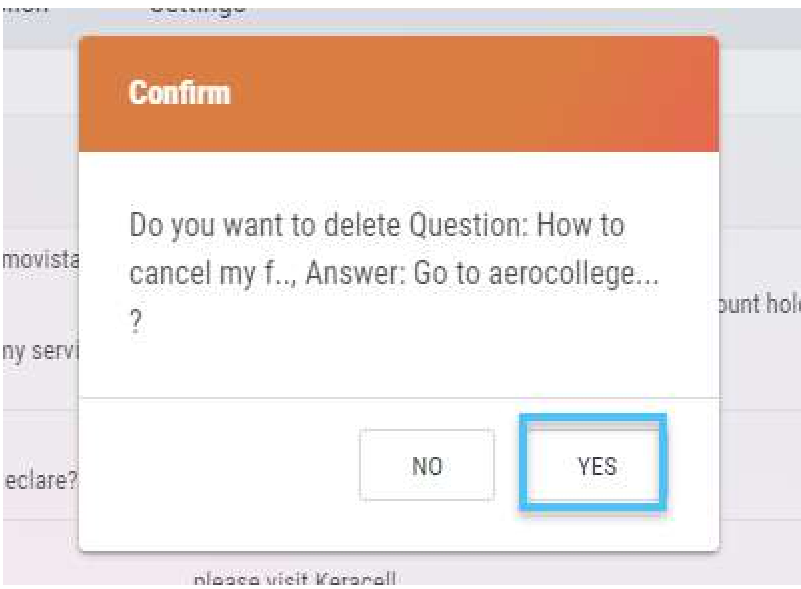
Follow these steps to delete questions and answers from the QnA Maker knowledge base created in OCC:

1. Go to the "*QnA Maker*" section located on the left-hand side of your screen.

2. From the "*EDIT*" tab 1 , click the "*Delete*" button associated with the question-and-answer pair you wish to delete 2 .



3. The following window will appear; click the "*YES*" button.



This action cannot be undone.

After deleting any of the questions and answers, you must publish the knowledge base for the published version to be updated

Related Articles

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How to associate an application from the App Store

How to publish the QnA Maker knowledge base

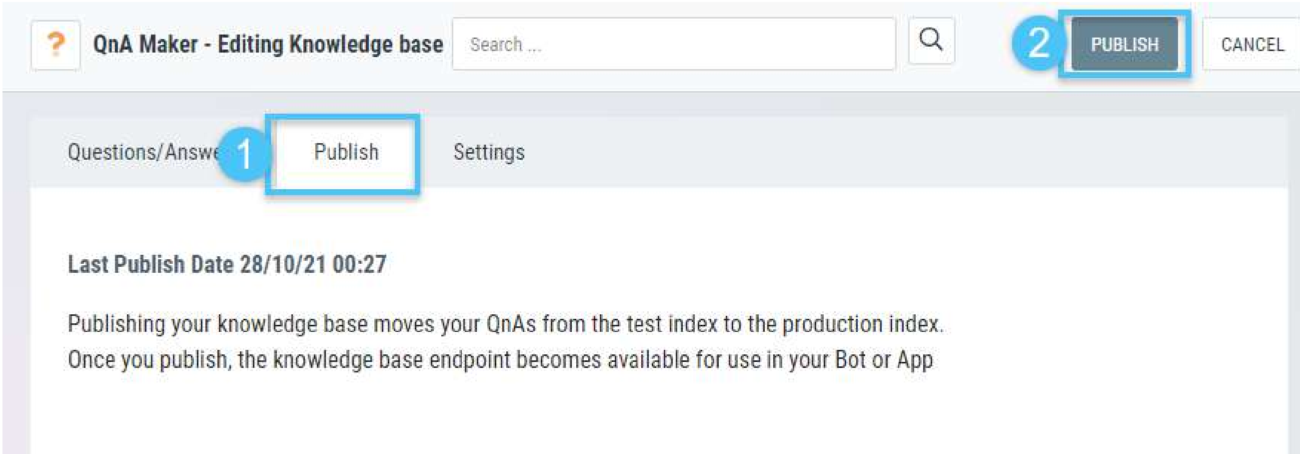
After creating the QnA Maker knowledge base and creating question-and-answer pairs, it is possible to publish these so that they can be used both by agents and by chatbots to provide automatic responses.

You must publish the knowledge base every time you add or edit question-and-answer pairs.

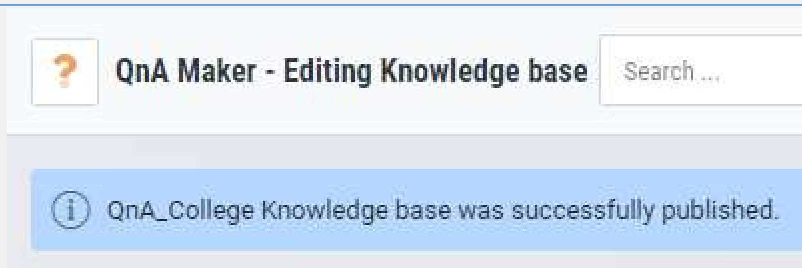
Follow these steps to publish the QnA Maker knowledge base created in OCC:

1. Go to the "*QnA Maker*" section located on the left-hand side of your screen.

2. From the "*POST*" tab 1 click the "*POST*" button 2



The following notice will appear:



Related Articles

- User search
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Shared Files

- What is the Shared Files repository?
- How to add a file to the Shared Files repository
- How to import a file to the Shared Files repository
- How to download a file stored in the Shared Files repository
- How to export a file stored in the Shared Files repository
- How to edit a file stored in the Shared Files repository
- How to delete a file stored in the Shared Files repository

What is the Shared Files repository?

The Shared File repository allows you to store images, audios, videos and files in a particular VCC.

These can be used by agents or process flows to respond to interactions from email accounts, WhatsApp and webchat. They can also be imported or exported for generating or using backups, or to be edited or deleted.

Accessing this section requires user-level permissions.

Related Articles

- User search
- How to set up Messenger messaging
- How to associate a YouTube account
- How to associate an application from Google Play Store
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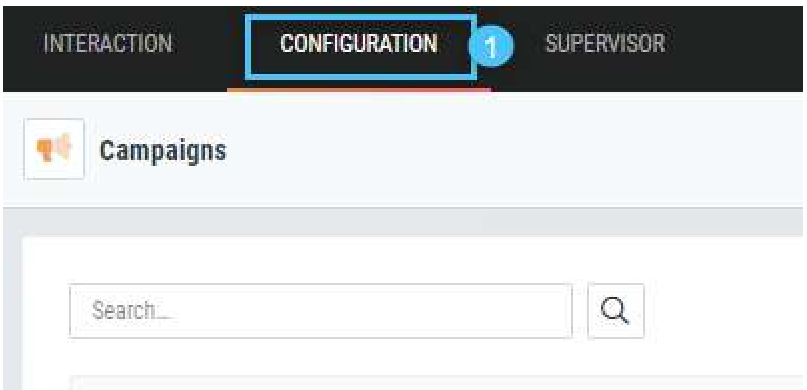
How to add a file to the Shared Files repository

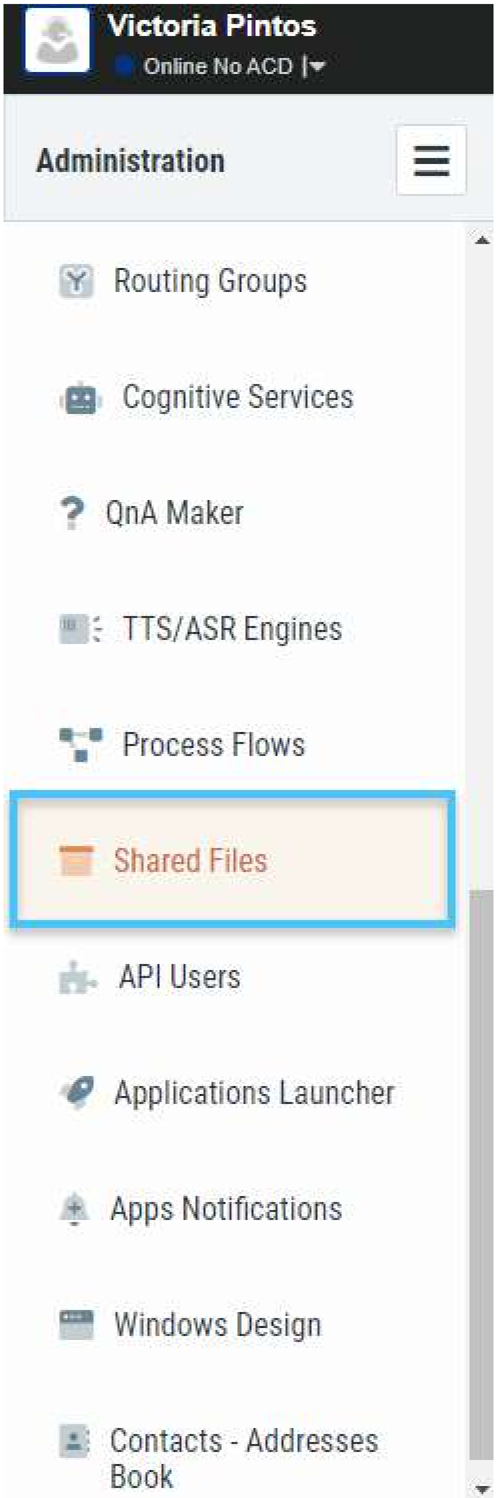
Shared files make up the repository of images, audios, videos and files that, among other things, can be used by agents and process flows to respond to interactions on the various channels offered by the platform.

The following document describes the step-by-step procedure to add a file to the shared file repository:

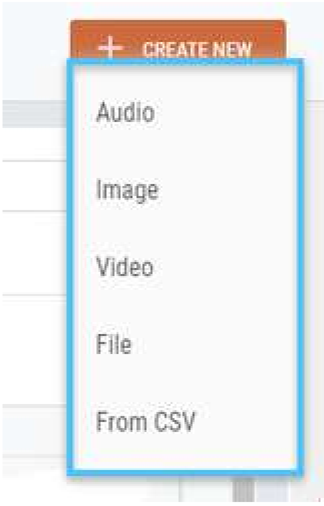
1. Go to the **"*Configuration*"** tab.



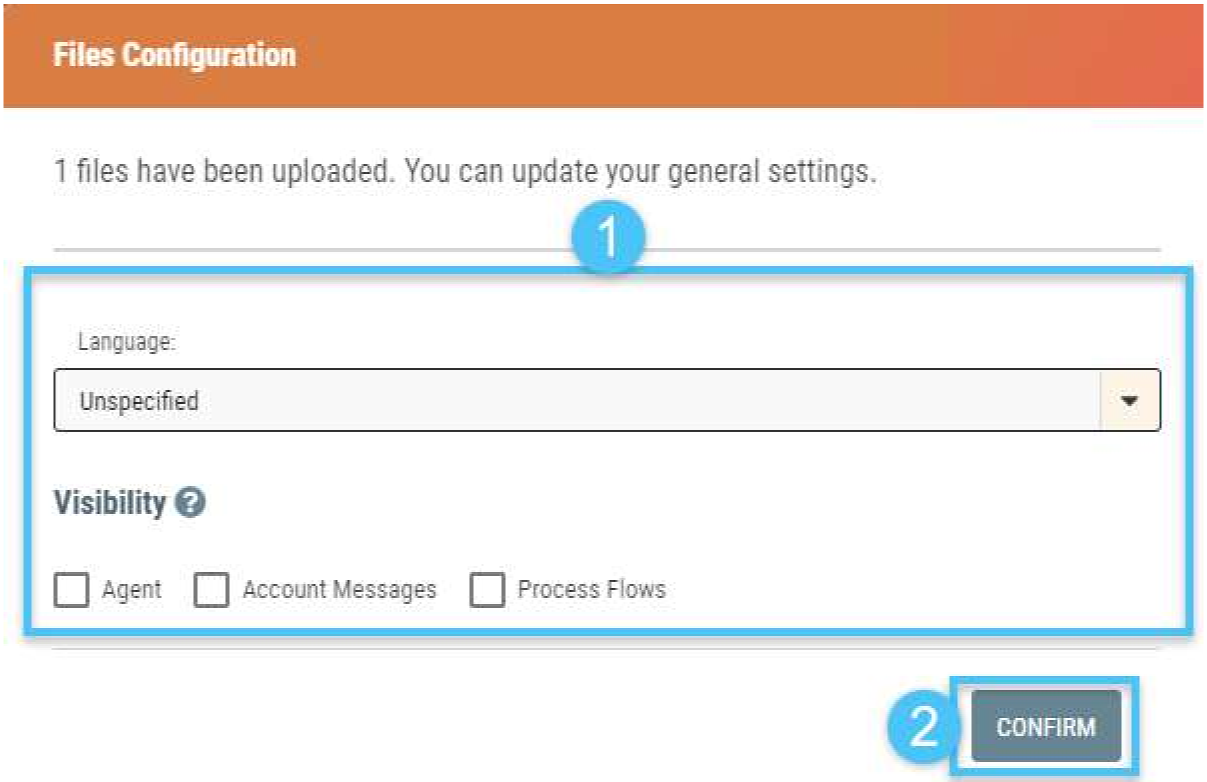
2. In the admin panel, locate the **"*Shared Files*"** section

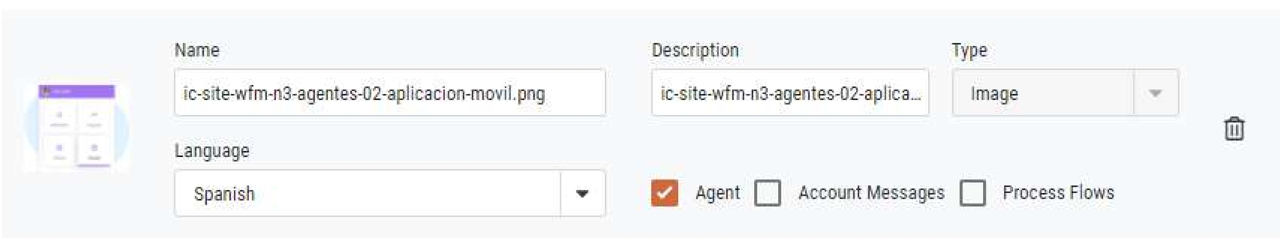


3. You will now be in the *Shared Files* viewer; click the ***"NEW FILE"*** button



4. You will see the following interface. Determine the required file information and then drag and drop the file or select it from your computer's file explorer .





Name: name of the shared file. By default, this field is filled out automatically with the name of the selected file, but you can always change it.

⚠ The filename can only contain letters, numbers, hyphens and periods.

Description: description of the file; this can be useful to specify what the file is about.

Type:

Click here to expand...

- Image
- Audio
- Video
- File

Visible to the Agent: on checking this box the file will become visible to agents, who will then be able to use it when responding to interactions.+

ℹ Files to be uploaded must be less than 16MB.

5. Click the **"CREATE"** button to save the file and go back to the file viewer or click the **"CREATE & CONTINUE"** button to add the file and stay on the add files screen.

Artículos Relacionados

How to add a file to the Shared Files repository

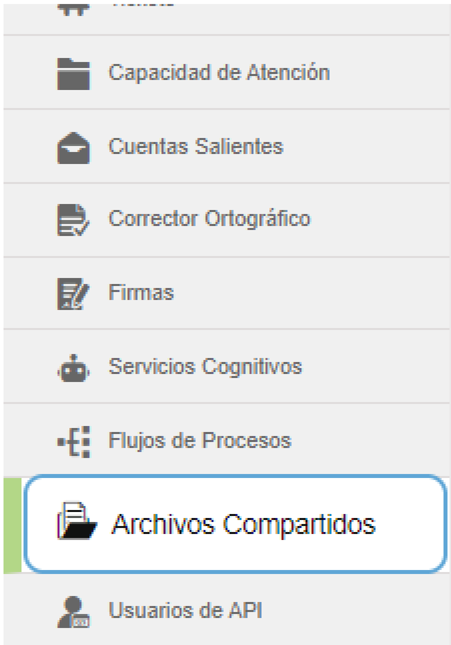
How to import a file to the Shared Files repository

Shared files make up the repository of images, audios, videos and files that, among other things, can be used by agents and process flows to respond to interactions on the various channels offered by the platform.
This offers the possibility of enriching this repository by importing files, regardless of type, using a *.json* file.

Follow these steps to import a file to the Shared File repository using a *.json* file:

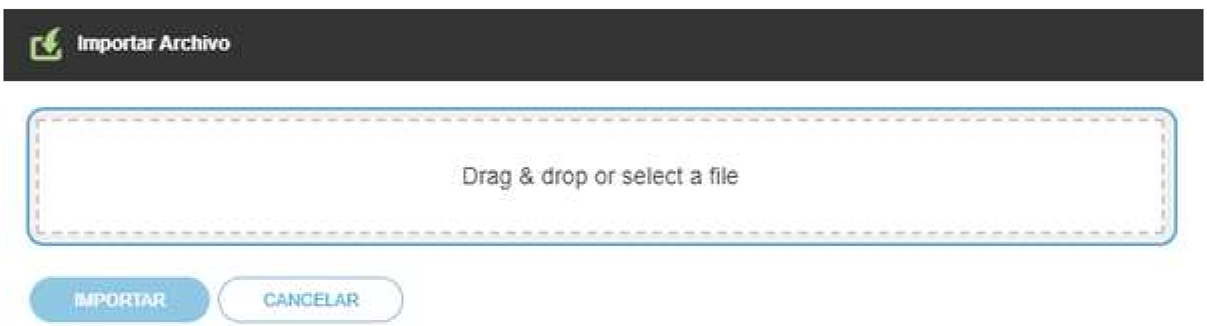
1. Go to the **"*Configuration*"** tab.

2. In the admin panel, locate the **"*Shared Files*"** section.

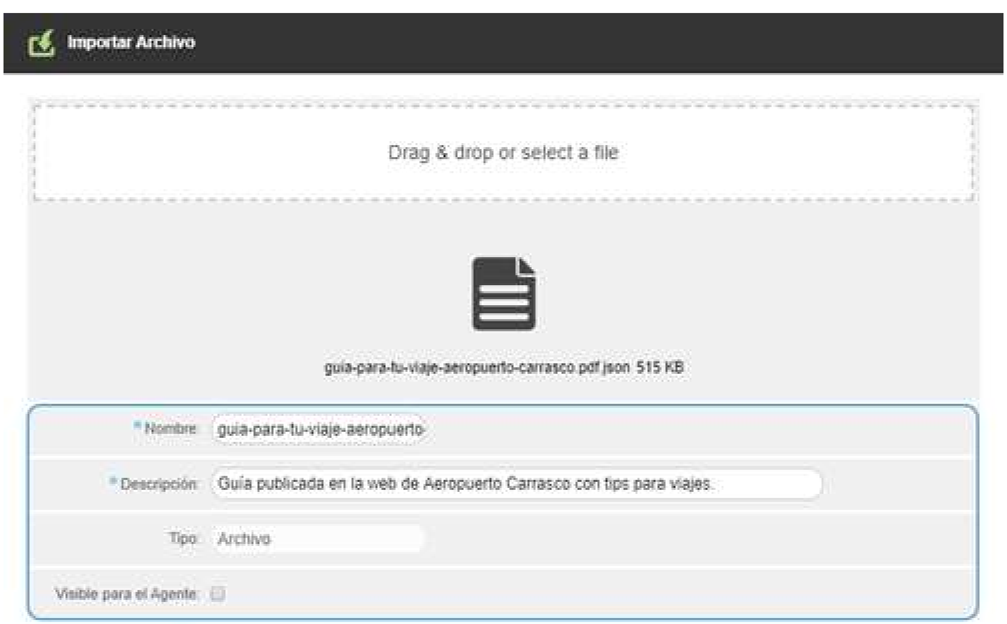


3. You will now be in the *Shared Files* viewer; click the ***"IMPORT"*** button.

4. The following window will pop up. Drag and drop the *.json* file or select it from your computer's file explorer.



5. Determine the information required about the file you will be importing.



Description: description of the file; this can be useful to specify what the file is about.

Type: file type, this is determined in the imported *.json* file.

Visible to the Agent: on checking this box the file will become visible to agents, who will then be able to use it when responding to interactions.

> **Name:** name of the shared file. By default, this field is filled out automatically with the name of the selected file, but you can always change it.
>
> ⚠ The filename can only contain letters, numbers, hyphens and periods.
>
> **Type:** file type, this is determined in the imported *.json* file.
>
> **Visible to the Agent:** on checking this box the file will become visible to agents, who will then be able to use it when responding to interactions.

6. Lastly, click the **"*IMPORT*"** button to complete the importation.

Related Articles

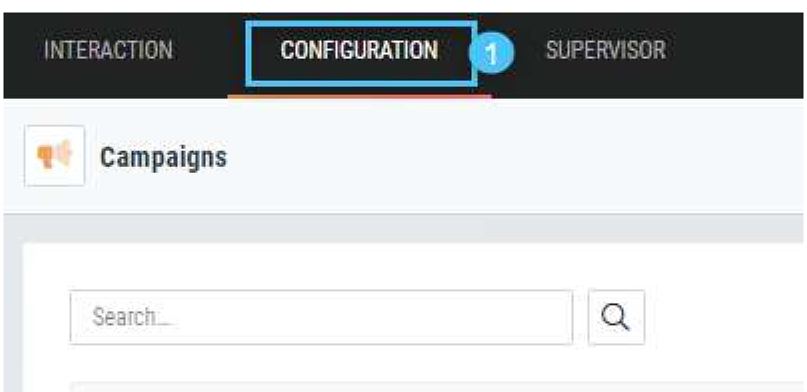
- User search
- How to set up Messenger messaging
- How to associate a YouTube account
- How to associate an application from Google Play Store
- How to associate an application from the App Store

How to download a file stored in the Shared Files repository

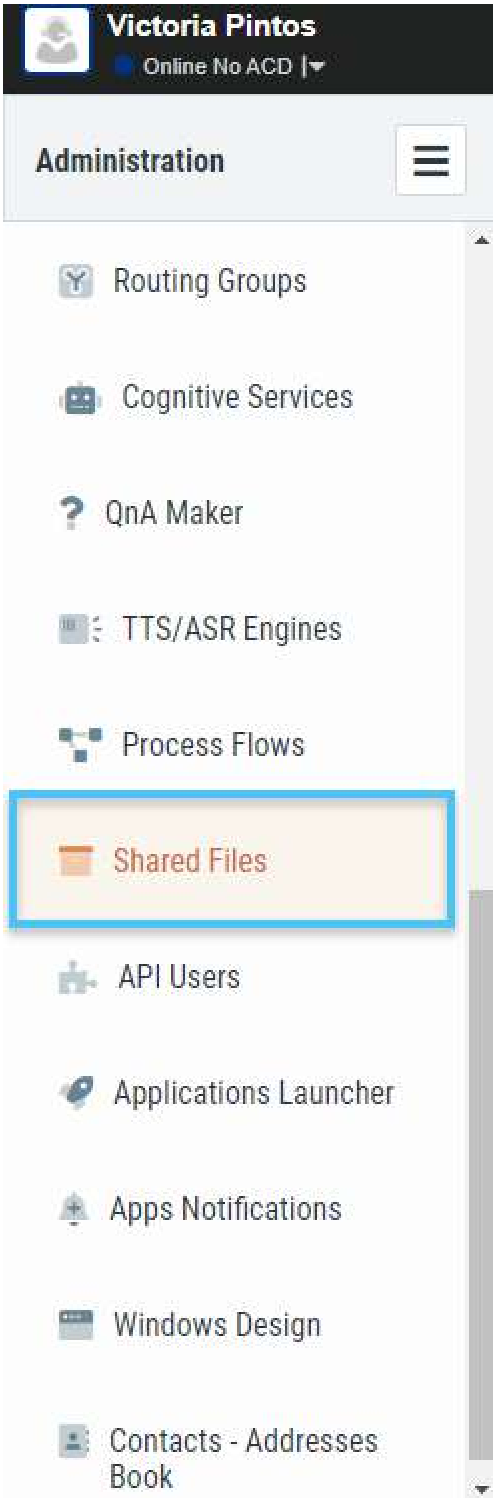
Among other functions, OCC's Shared Files repository allows any of the stored files to be downloaded, regardless of type. Download files, for example, to have local *backup* copies of them.

Follow these steps to learn how to download a file stored in the Shared File repository:

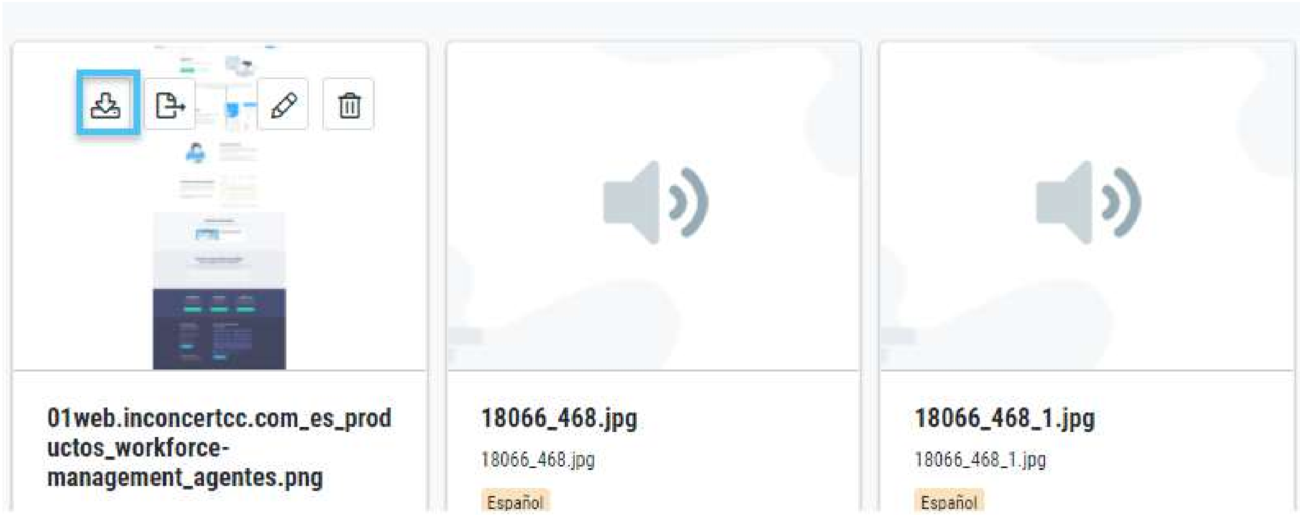
1. Go to the **"*Configuration*"** tab.



2. In the admin panel, locate the **"*Shared Files*"** section.



3. You will now be in the *Shared Files* viewer; click the ***"Download"*** button for the file you wish to download



The file will be downloaded to your computer, keeping the same name as in the repository, which in this example is ***Tips_viaje_avion.mp3***

Related Articles

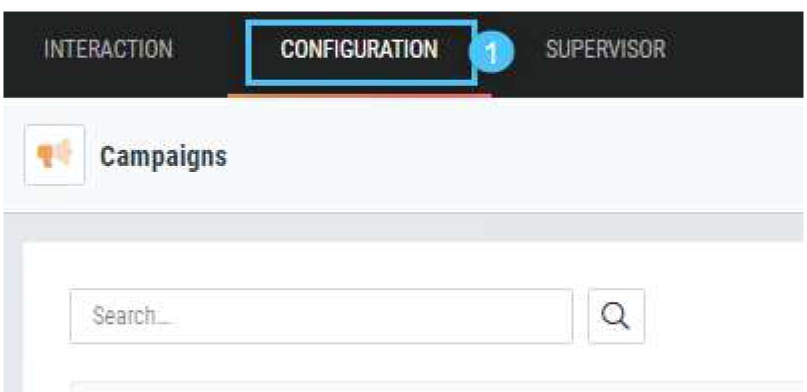
- User search
- How to set up Messenger messaging
- How to associate a YouTube account
- How to associate an application from Google Play Store
- How to associate an application from the App Store

How to export a file stored in the Shared Files repository

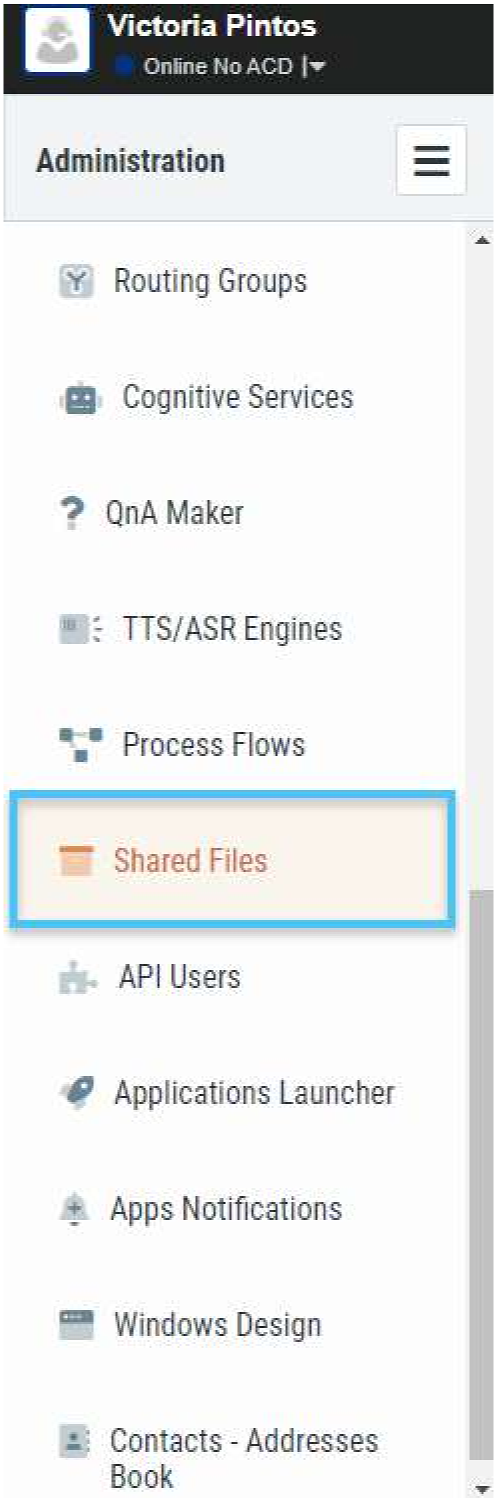
Among other functions, OCC's Shared Files repository allows any of the stored files to be exported, regardless of type. These are exported in *.json* format and can thus be added to a web page or imported into another shared files repository.

Follow these steps to learn how to export a file stored in the Shared File repository:

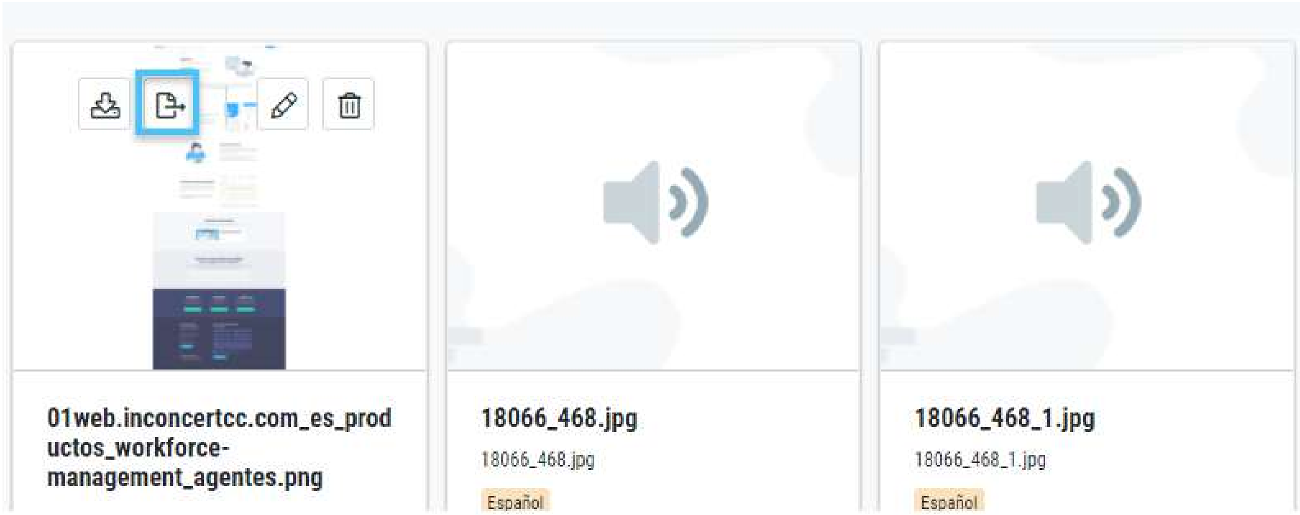
1. Go to the **"*Configuration*"** tab.



2. In the admin panel, locate the **"*Shared Files*"** section.



3. You will now be in the *Shared Files* viewer; click the ***"Export"*** button for the file you wish to export.



A *.json* file with the name of the exported file, which in this example is ***AeroCollege_around_the_world.png.json***, will be downloaded to your computer.

Related Articles

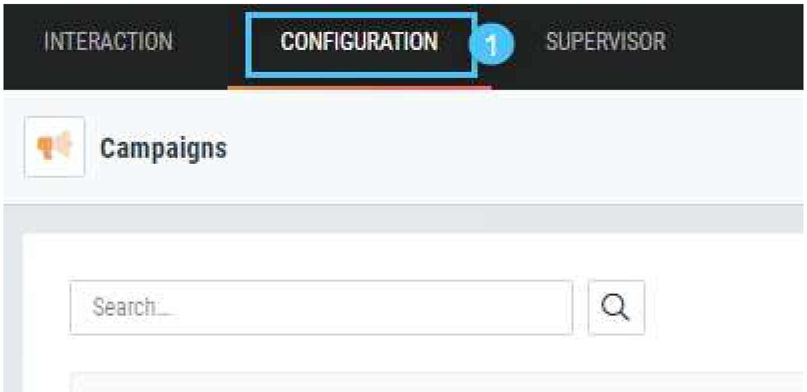
- User search
- How to set up Messenger messaging
- How to associate a YouTube account
- How to associate an application from Google Play Store
- How to associate an application from the App Store

How to edit a file stored in the Shared Files repository

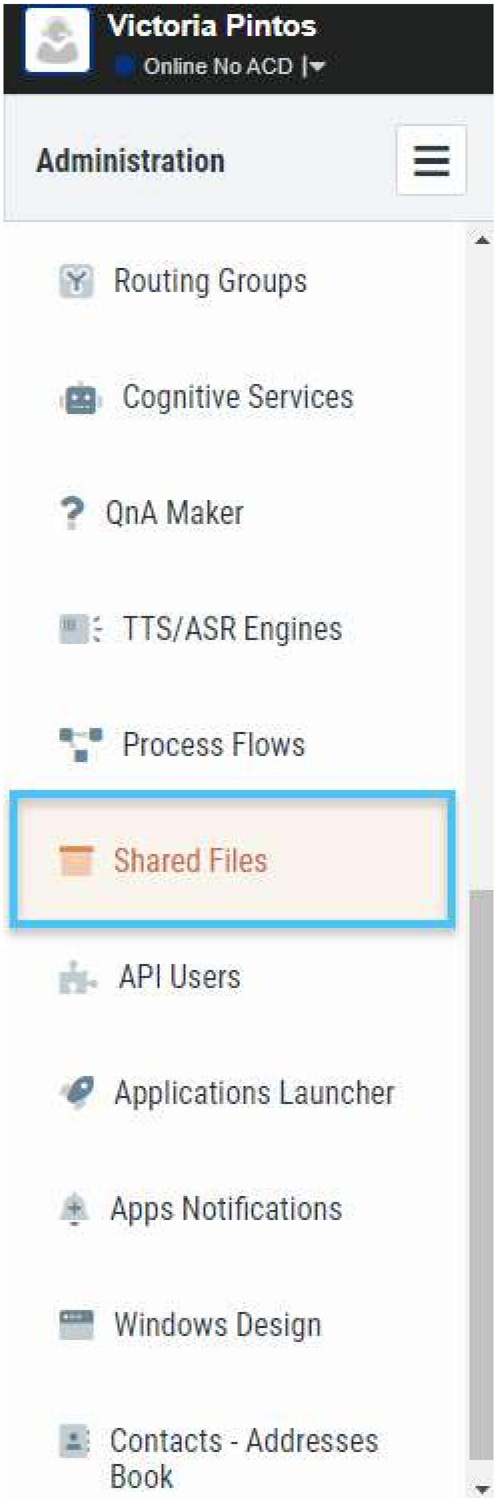
Given the continuous changes that can happen during the operation, it is possible to edit each of the files that are stored, regardless of type, through the OCC Shared Files repository.
Regularly editing the repository will keep it updated and useful.

Follow these steps to learn how to update a file stored in the Shared File repository:

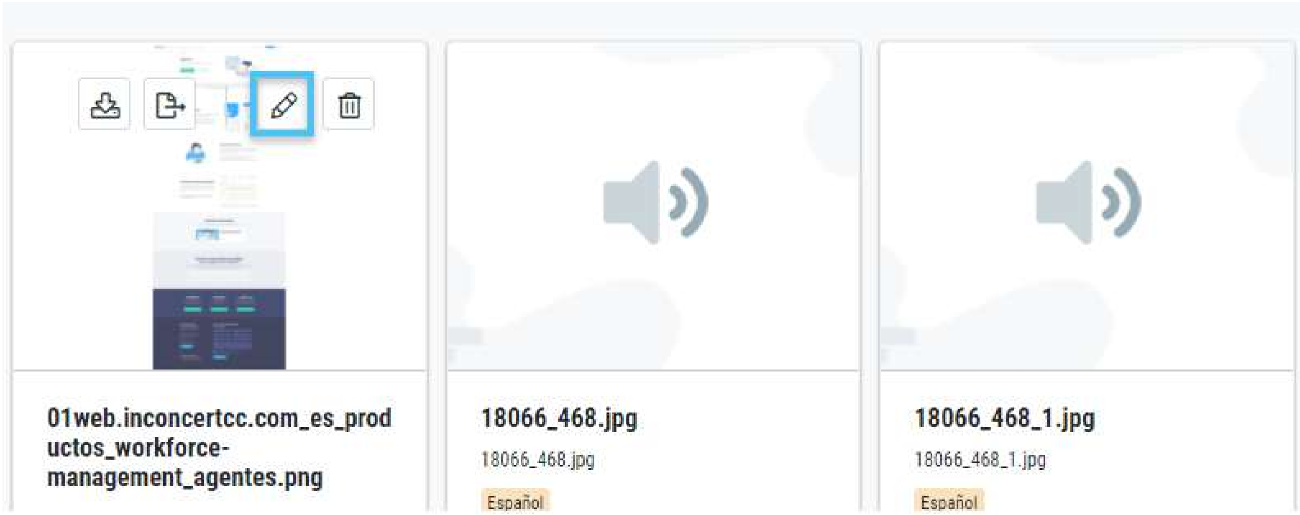
1. Go to the ***"Configuration"*** tab.



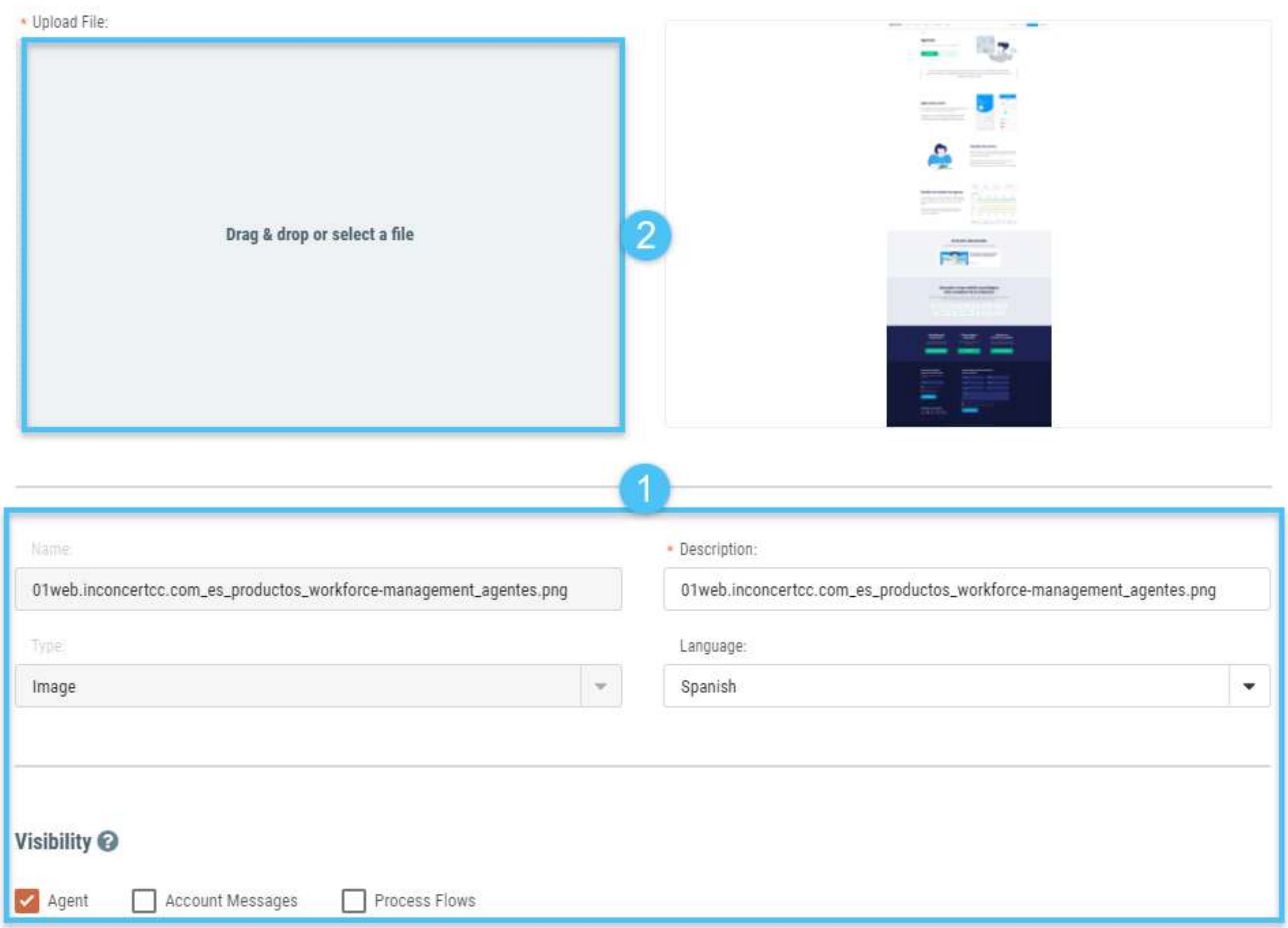
2. In the admin panel, locate the **"*Shared Files*"** section.



3. You will now be in the *Shared Files* viewer; click the ***"Edit"*** button for the file you wish to update.



4. You will see the following interface; you can edit the description of the file and its visibility You can also drag and drop an updated version of it or select this from your computer's file explorer.



5. Lastly, click the ***"UPDATE"*** button to apply the update.

Related Articles

- User search

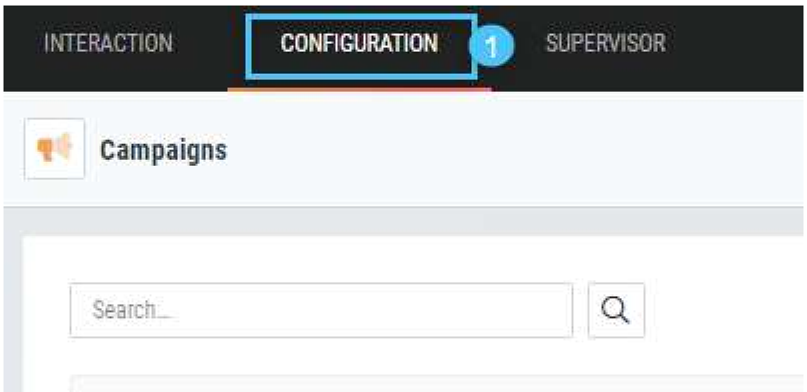
- How to set up Messenger messaging
- How to associate a YouTube account
- How to associate an application from Google Play Store
- How to associate an application from the App Store

How to delete a file stored in the Shared Files repository

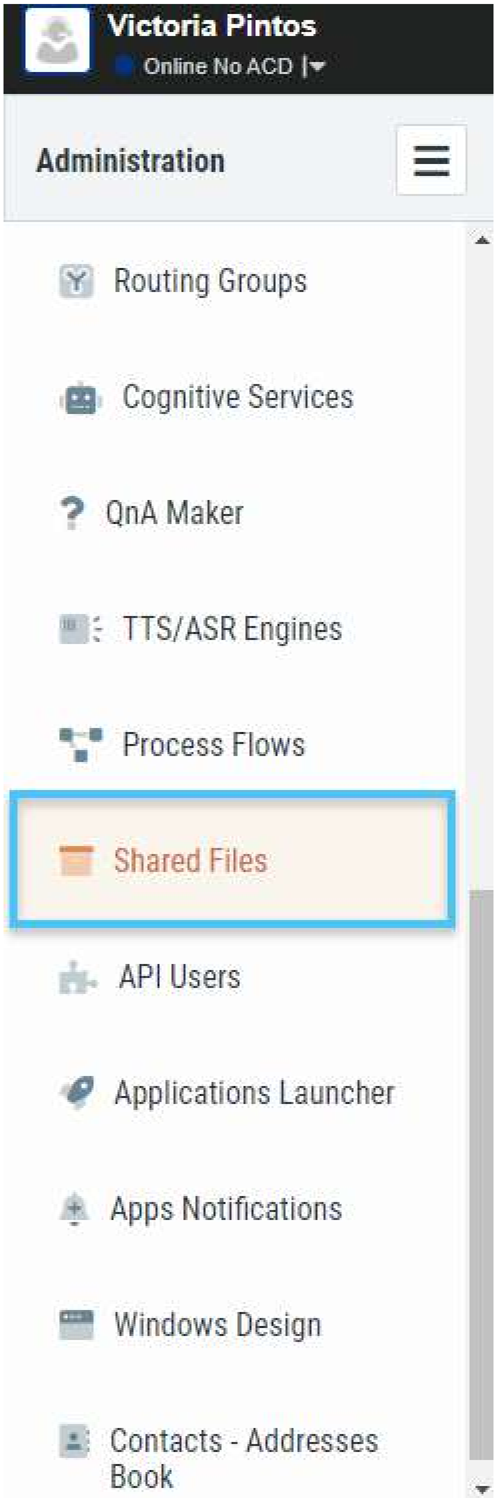
Given the continuous changes that can happen during the operation or the need to free up space, it is possible to delete each of the stored files through the OCC Shared Files repository.

Follow these steps to learn how to delete a file stored in the Shared File repository:

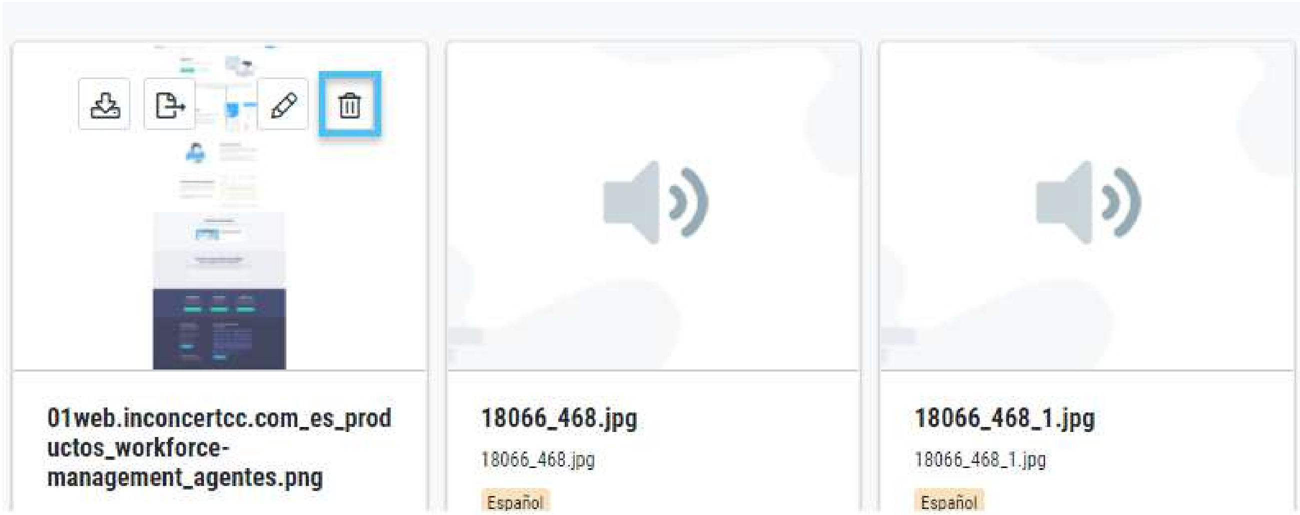
1. Go to the **"*Configuration*"** tab.



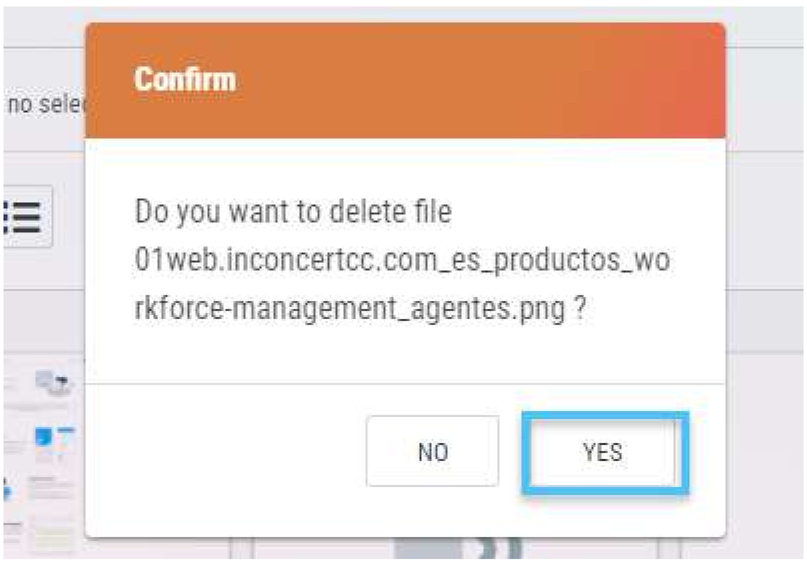
2. In the admin panel, locate the **"*Shared Files*"** section



3. You will now be in the *Shared Files* viewer; click the **"*Delete*"** button for the file you wish to delete.



4. The following window will appear; click ***"YES"*** to confirm deletion of the file.



This action cannot be undone.

Related Articles

- User search
- How to set up Messenger messaging
- How to associate a YouTube account
- How to associate an application from Google Play Store
- How to associate an application from the App Store

Address Book

- What is an address book?
- How to create an address book

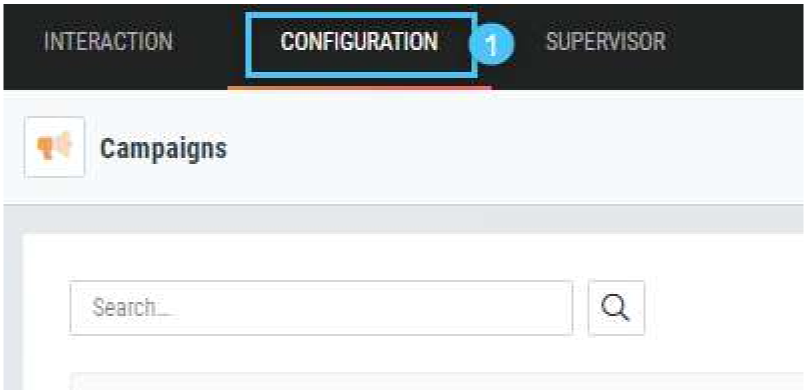
What is an address book?

The address book contains a list of addresses or contact numbers that can be used by an agent when making an outbound interaction.

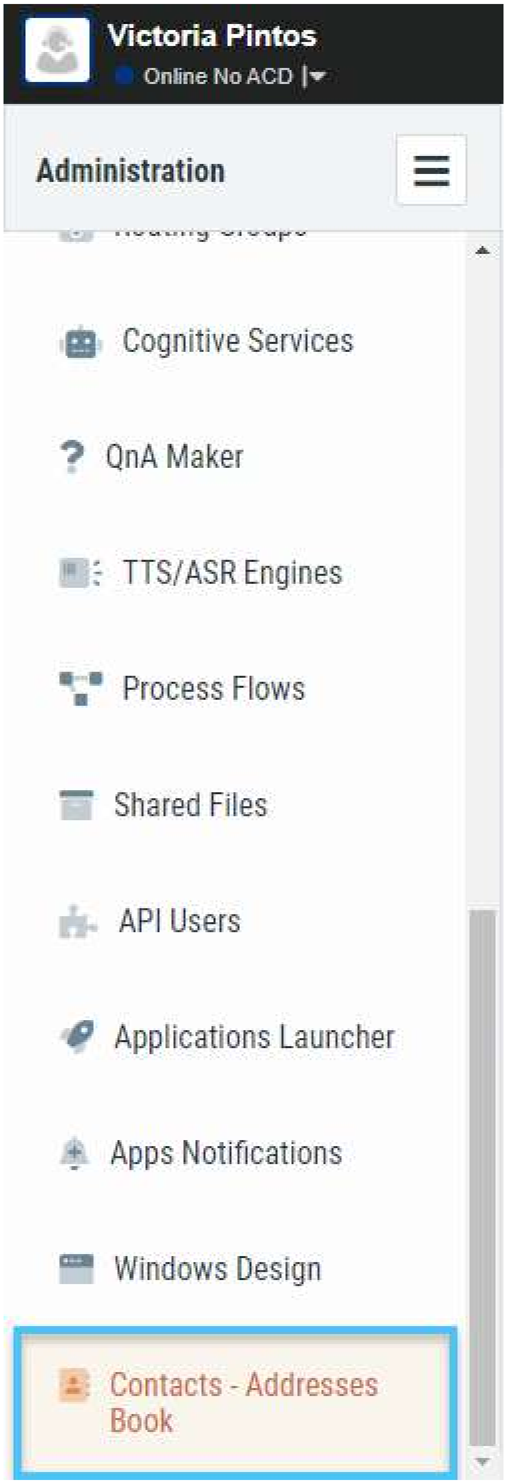
How to create an address book

Follow the steps below to create an address book:

1. Go to the "***Configuration"*** section:

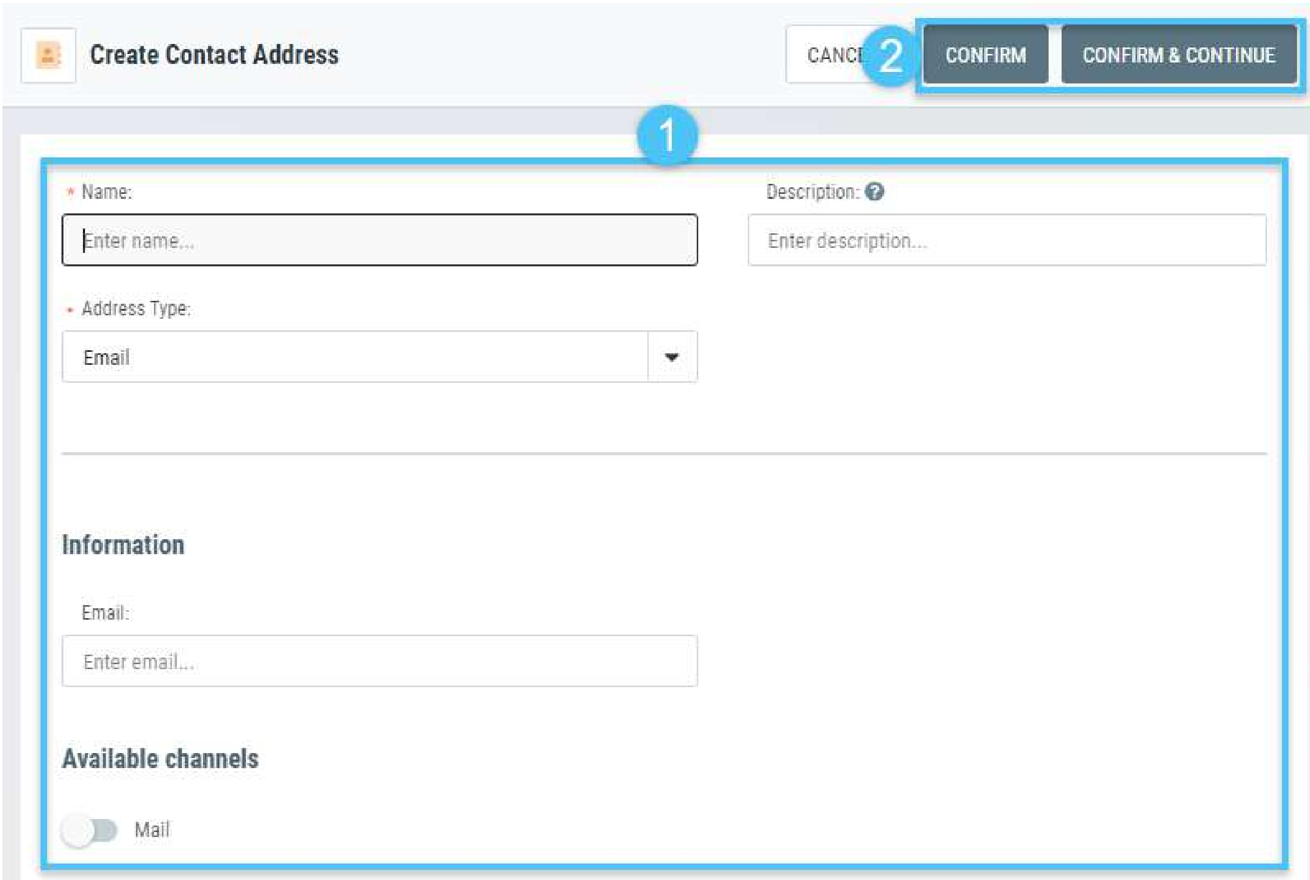


2. In the navigation menu, go to the ***"Contacts - Addresses* Book"** section**:**



3. Click on the ***"NEW ADDRESS"*** button.

4. Fill out the necessary information and then click on ***"Create"*** or ***"Create & Continue"*** should you want to add a new contact to the address book.



Name: name by which the contact will be identified.

Description: description of the contact.

Address Type: enter the client's contact address type

Available types of address

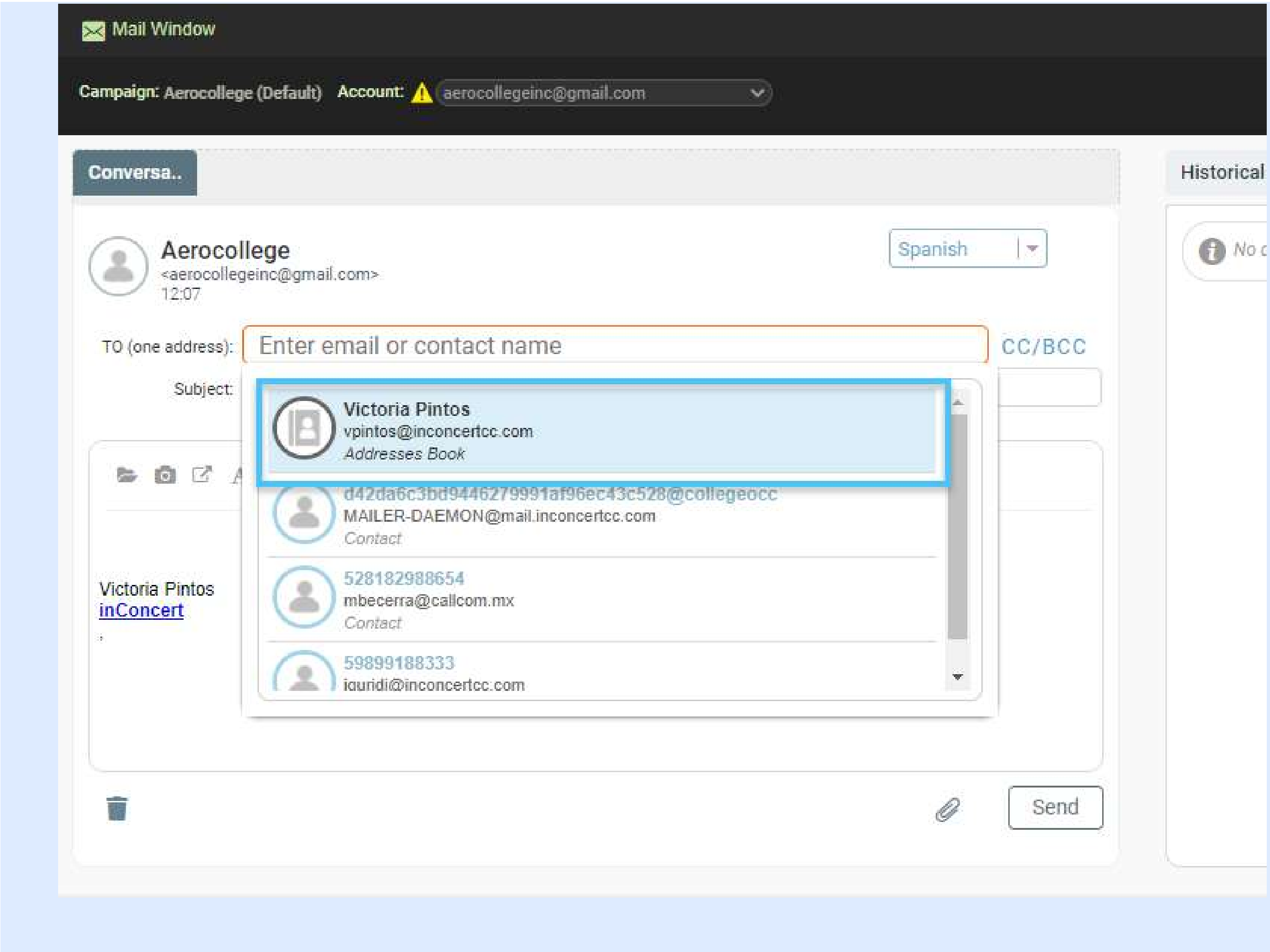
Email

Telephone

Channels: enter which contact channels you want to be available for use with the address entered.

Address Information: enter the address, depending on what type it is.

When you generate an outbound interaction associated with the contact you have created, you will be able to view this contact:



If this section is not displayed, check that the user has the ***necessary permissions.***

OCC Process Flow

- What is the inConcert Process Flow tool?
- State
- Activities
- Class
- Flows
- Usage examples

What is the inConcert Process Flow tool?

Process Flow is a graphical tool that allows us to design and also maintain **flows of calls, IVRs, and chatbots** for different channels.

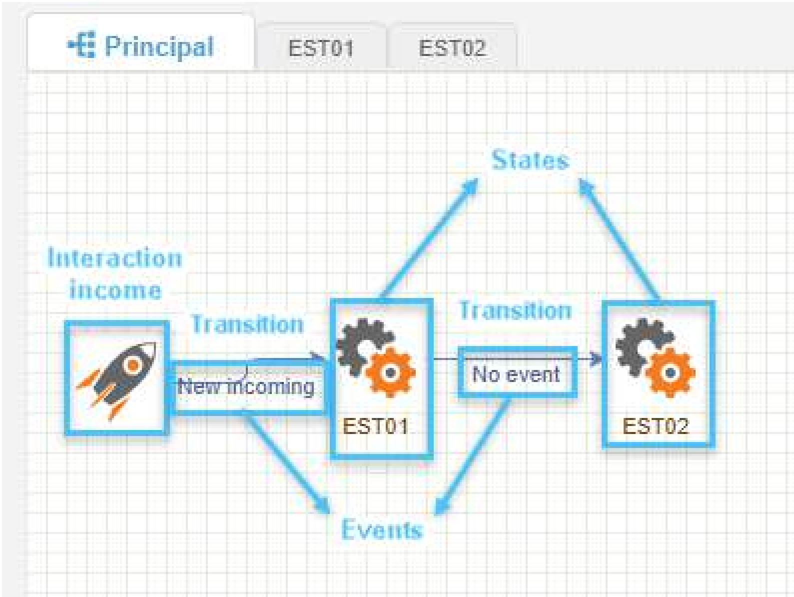
It offers the possibility of running basic flows such as issuing a welcome message and transferring to an agent, as well as complex flows that query databases.

These flows include **states, activities, and events.**

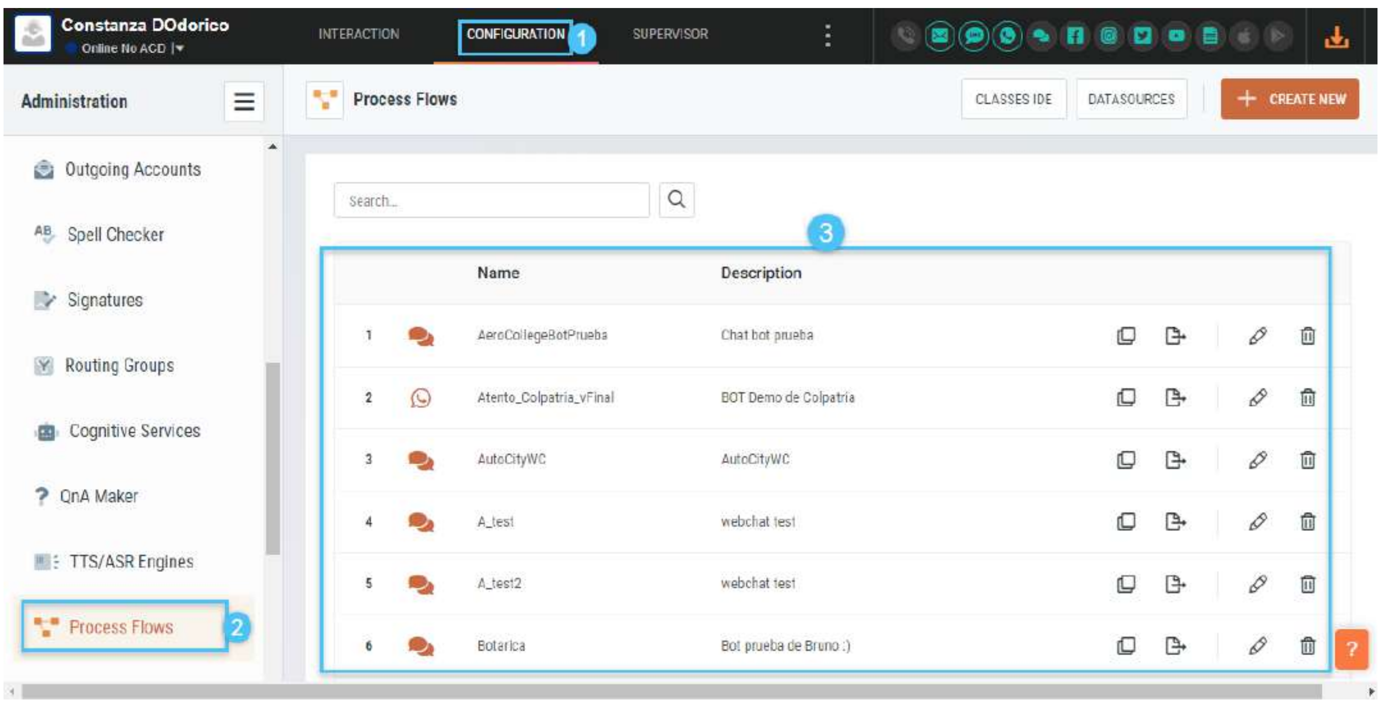
The states encompass the process logic.

Activities are defined within states.

We can link states through transitions and events.



Access to Process Flow is via the **"CONFIGURATION" (1)** tab in the **"Process Flows"** section (2). There you will be able to see the existing flows, create new ones, edit them, or clone them, among other possibilities (3).



To learn how to use this tool, see: What is a state?

State

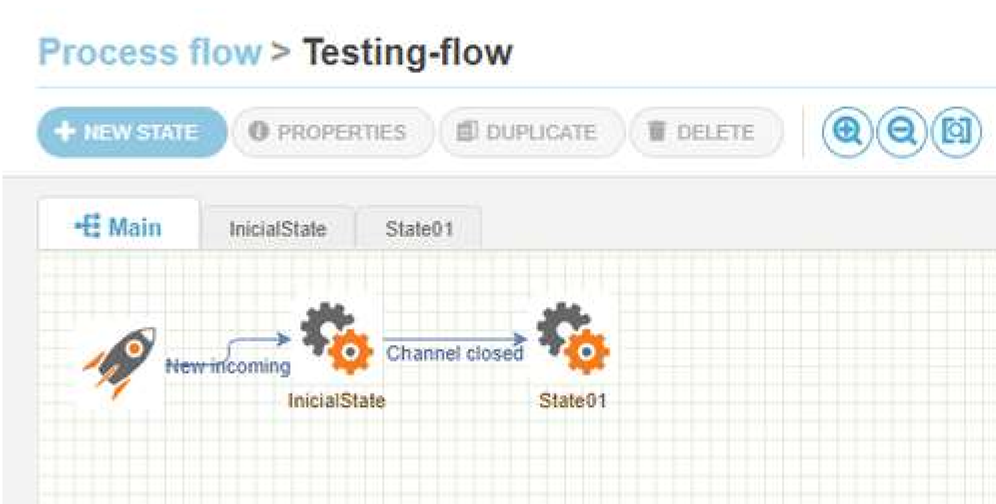
- What is a state?
- What is a transition?
- What is an event?
- How to add a state
- How to delete a state from the flow
- How to modify the properties of a flow state
- How to add a transition between states
- How to delete a transition

What is a state?

A state is the logical grouping of activities that make up the flow.

It is recommended that states encapsulate the process logic as much as possible.

The states are displayed with the  icon as in the following image:



Info
See: What is a transition?

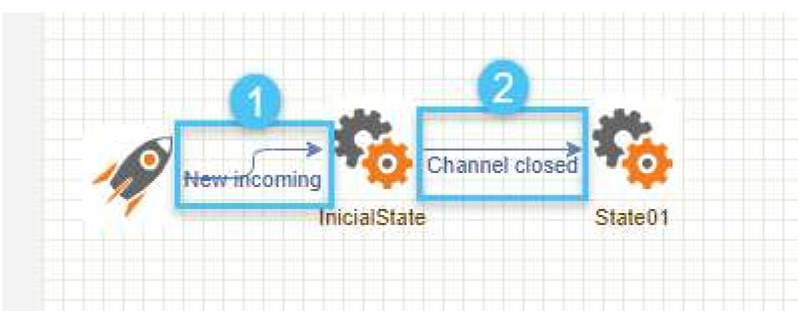
Related Articles

- User search
- How to set up Messenger messaging
- How to associate a YouTube account
- How to associate an application from Google Play Store
- How to associate an application from the App Store

What is a transition?

Transitions are represented by a line and are used to link two states. In addition, they allow the use of flow logic conditionals.

Events can be added within transitions.



In the image above, we can see two transitions:

Transition (1) links the beginning of the flow with the "InitialState" state. This transition has the fundamental event **"New Incoming"**, which enables using the InitialState on receipt of the call/interaction.
Additionally we have **transition (2)** that links the "InitialState" state to the "State01" state. This transition includes the "Answered" event.

See: What is an Event?

Related Articles

- User search
- How to set up Messenger messaging
- How to associate a YouTube account
- How to associate an application from Google Play Store
- How to associate an application from the App Store

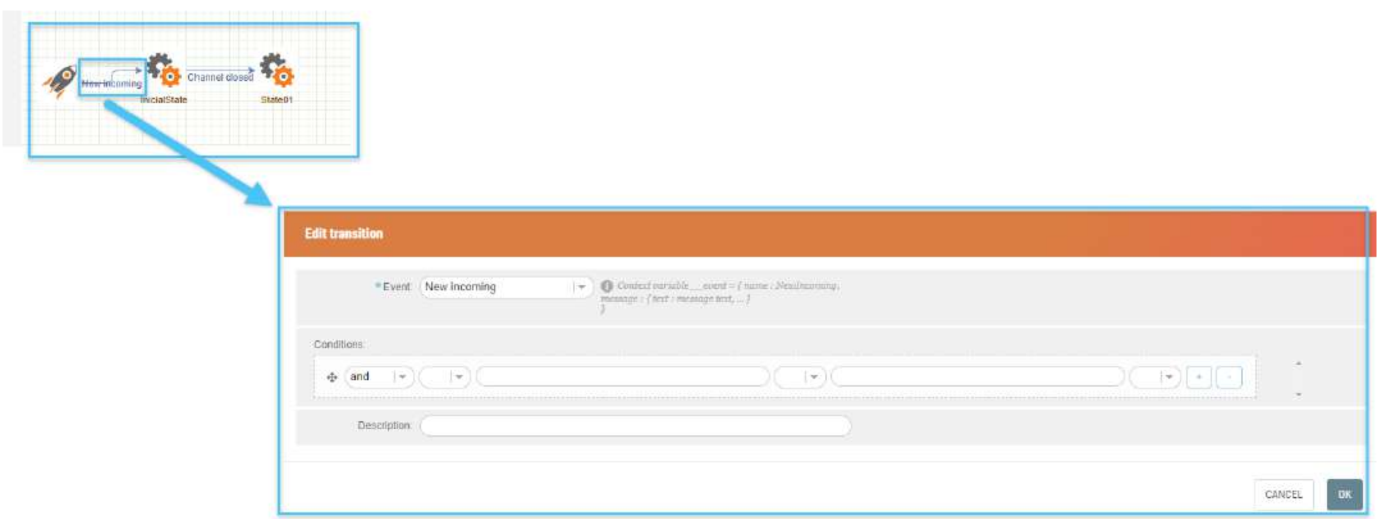
What is an event?

An event is something that happens that is used as a transition between states. It can refer to changes in the state of a call or interaction, or a logical condition, either of a fixed value or time-based.

The most commonly used events are listed below:

Event	Description
Answered	The call is answered
Channel closed	The interaction channel is closed
NewIncoming	Enter a new interaction
NoEvent	A transition occurs without a particular event

Below is the "New incoming" event defined in the transition between the beginning of the flow and the "InitialState" state.

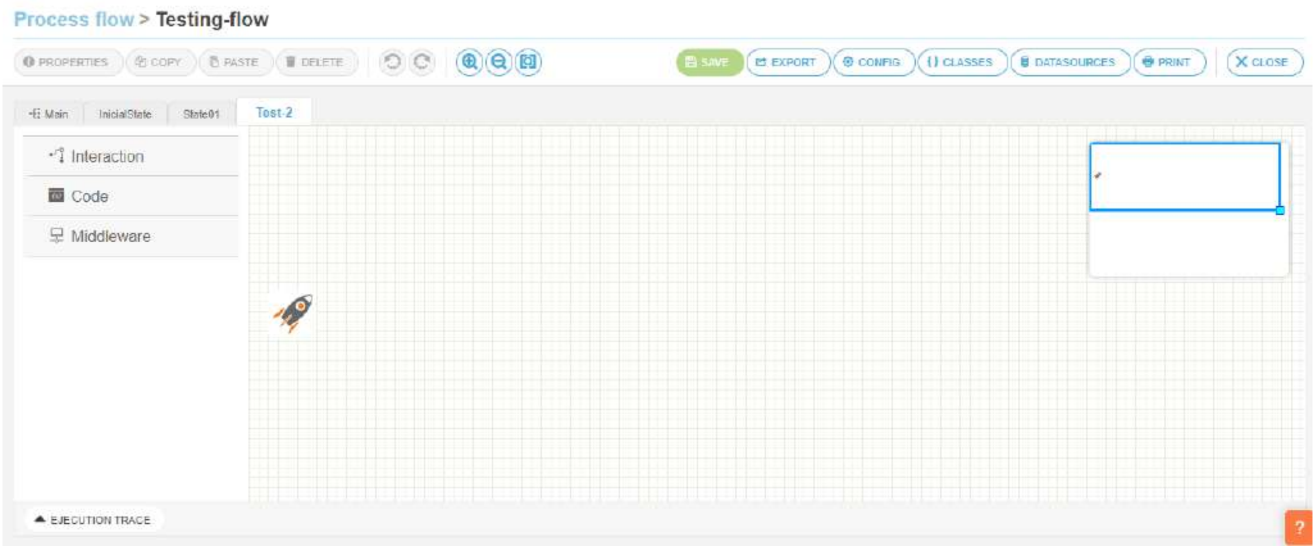


See: How to add a state.

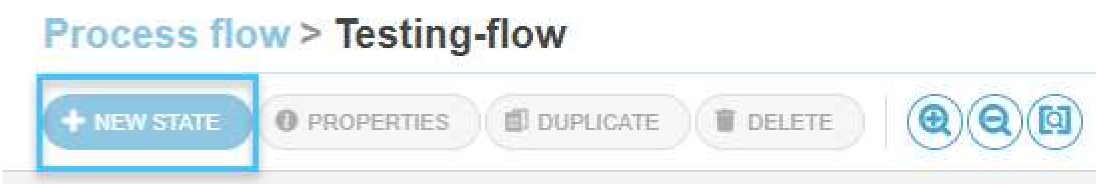
How to add a state

The following guide describes the process for adding a state.

1. First, **go to the tool's drawing area**, where you will see a screen like the following one:

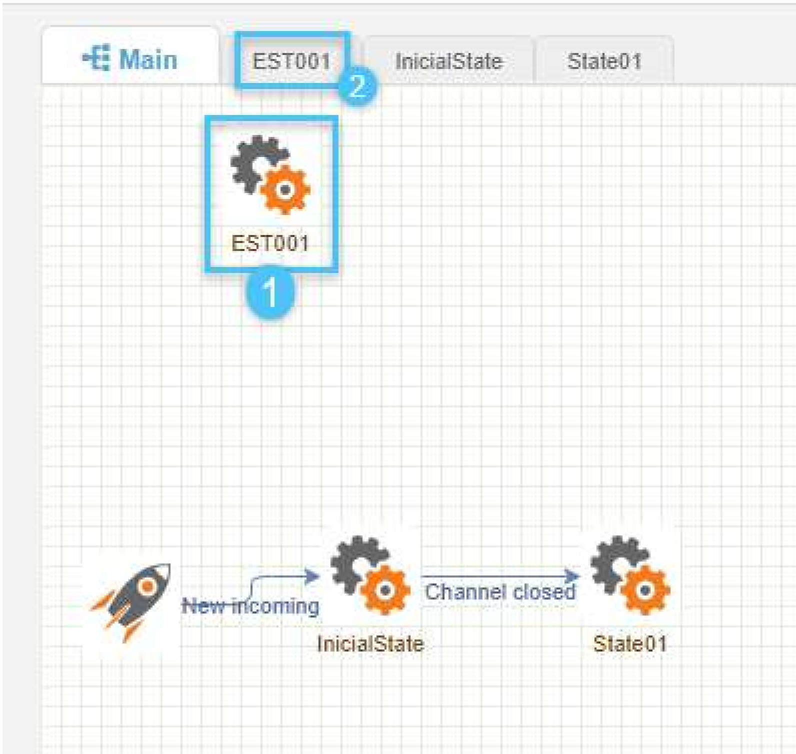


2. Click on the ***"NEW STATE"*** button in the upper left corner of the screen.



3. To add a new state, simply **enter a name** and a **description** and click the **"OK"** button.

4. The state will be added to the drawing area; it can be dragged to another position **(1),** if desired. In addition, a tab will be added where all the activities included in it will be displayed **(2)**.

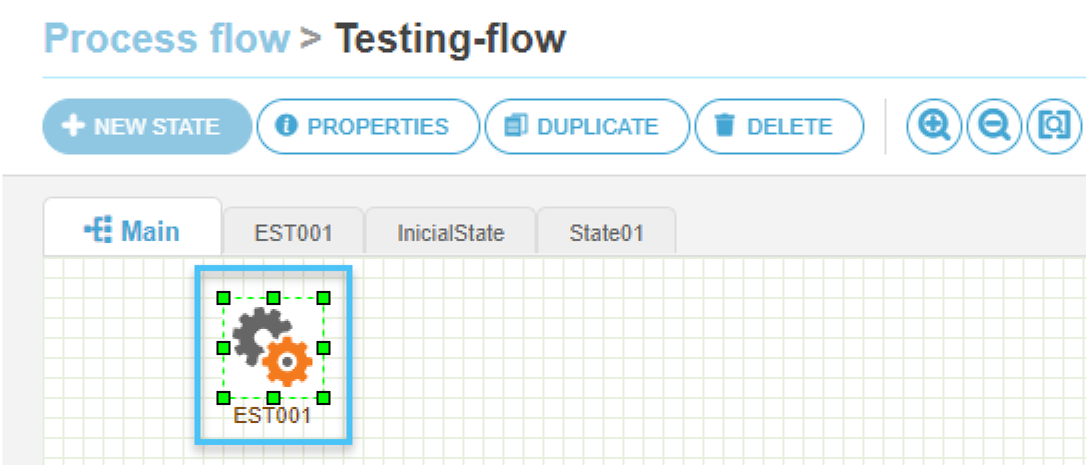


See How to delete a state from the flow to learn how to delete a state from the flow.

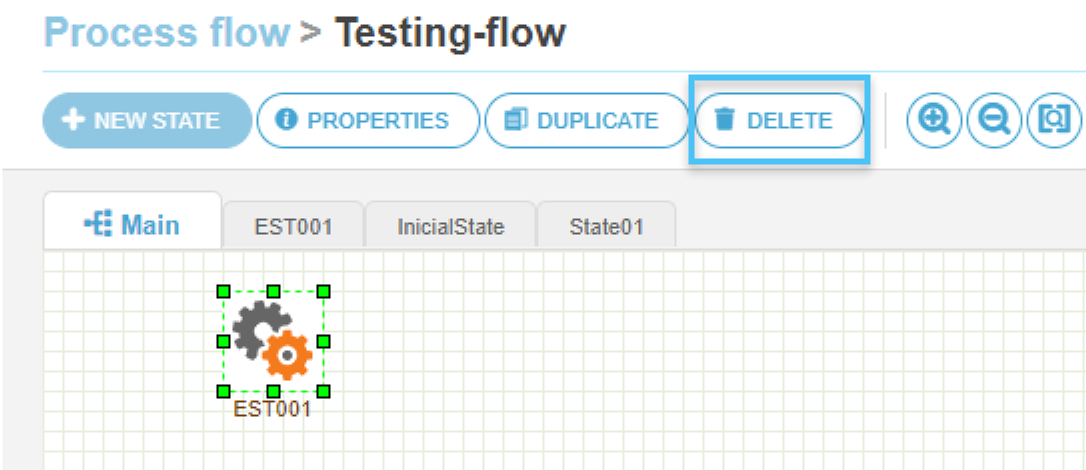
How to delete a state from the flow

The following guide describes the process for deleting a state from the flow.

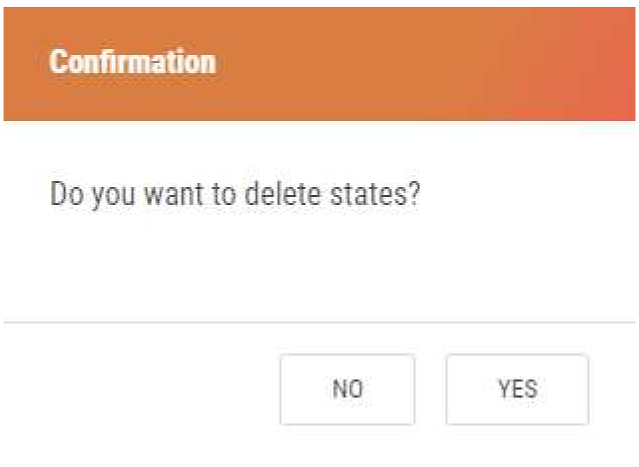
1. Within the flow, view the state you wish to delete and select it.



2. Once selected, you can either press the **"Delete" k**ey or click the **"DELETE"** button located at the top.



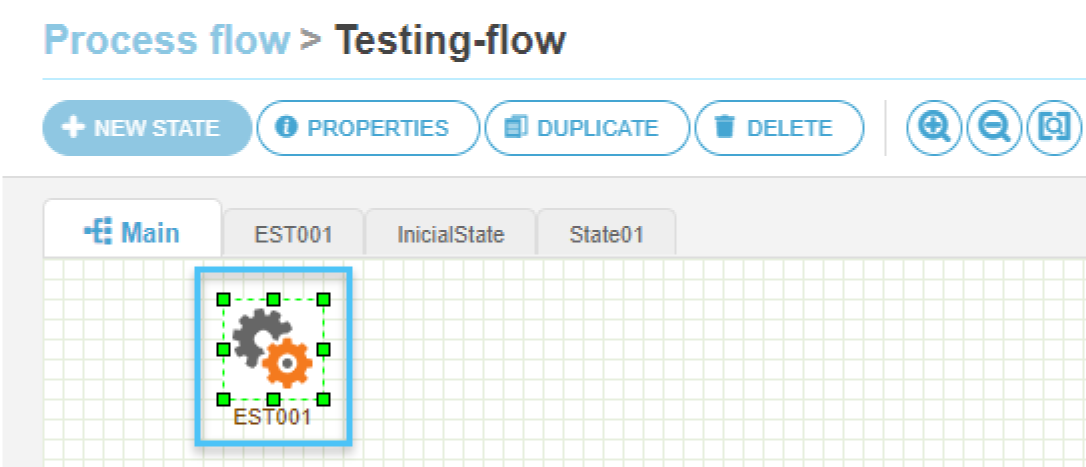
3. The following window will appear; confirm that you wish to delete the state by clicking **"Yes"**.



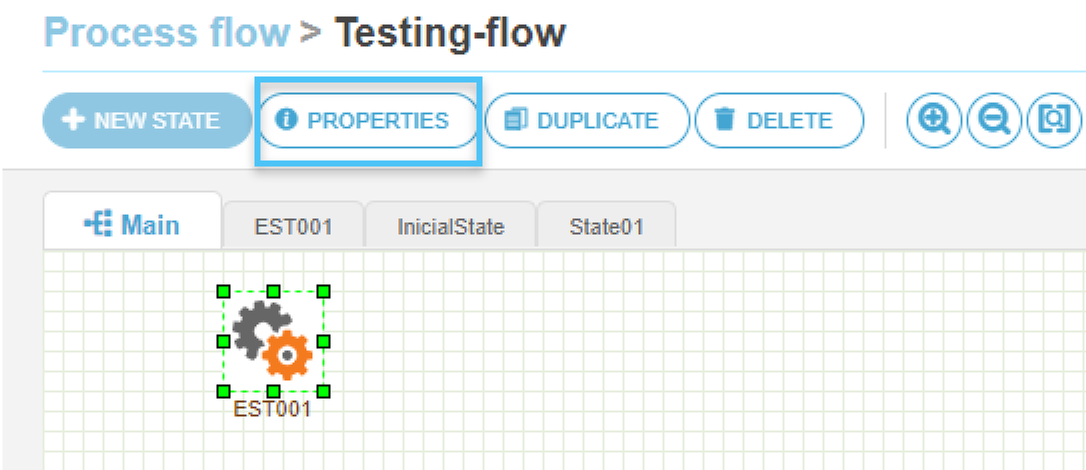
How to modify the properties of a flow state

The following guide describes the process for modifying the properties of a flow state.

1. Within the flow, view the state you want to modify and select it.



2. Once selected, click the **"PROPERTIES"** button**.**



3. The following window will appear where you can modify the name or description, then click the **"OK"** button**.**

.

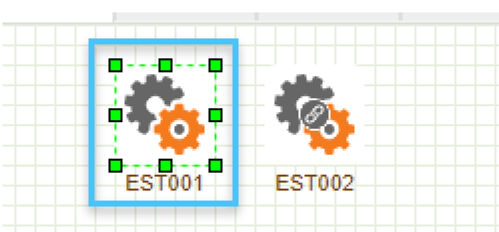
See How to add a transition between states.

How to add a transition between states

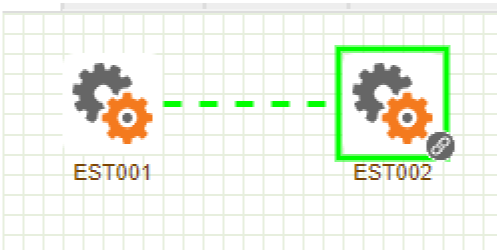
The following guide describes the process for adding a transition between states.

For information on what transitions are, see: What is a transition.

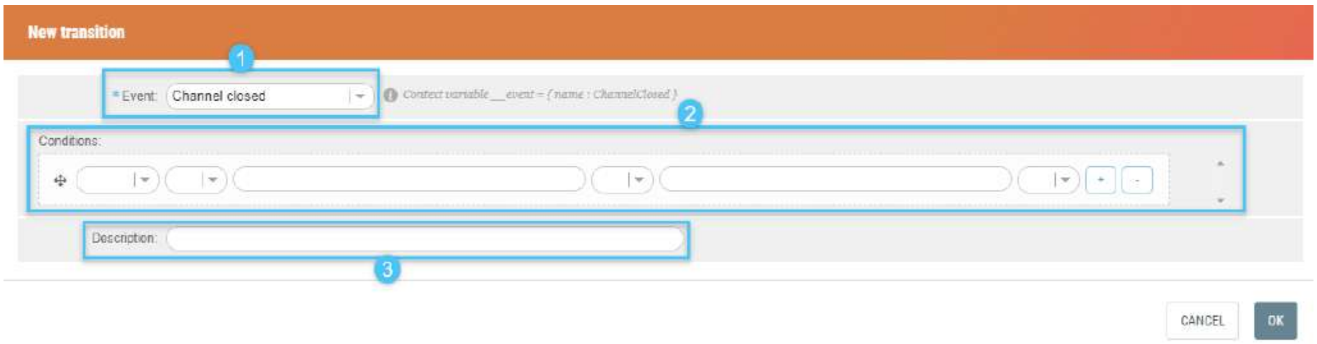
1. In the drawing area, **select and position the cursor on** the state from which the transition will start (in this example, state EST001).



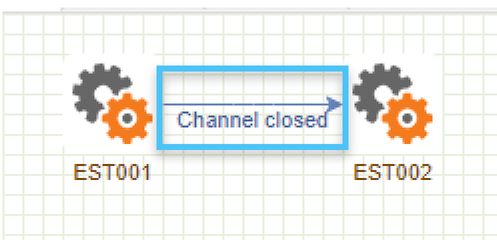
2. When you position the cursor over the state, you will see the icon , which you must **left click and drag** to the state you want to transition to (in this example, state EST002).



3. The following window will appear; select an **Event** **(1).** You can **add conditionals (2)** and a description **(3)**; to finish, click the **"OK"** button.



4. You can see the transition between the states indicated by the arrow that links them, with the event below it.

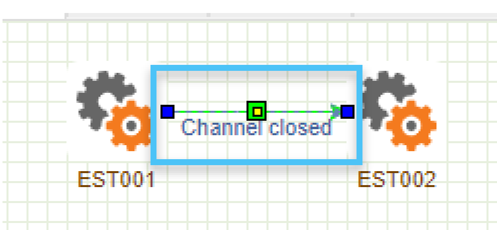


See How to delete a transition.

How to delete a transition

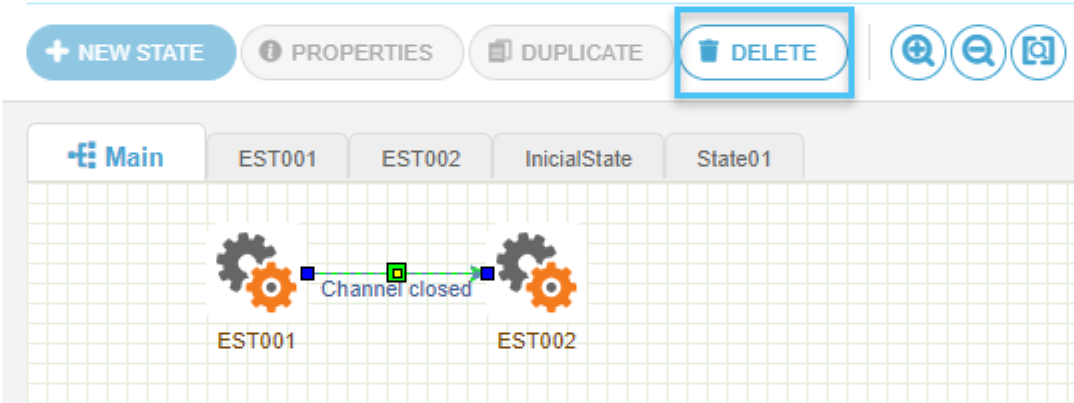
The following guide describes the process for deleting a transition between states.

1. On the drawing area**, select and position the cursor over the transition** you wish to delete.

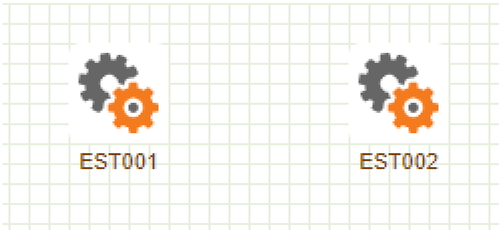


2. Once selected, you can either **press the "Delete" key or click the "DELETE"** button located at the top.

The transition will be deleted on pressing DELETE, so you must be sure that you really do want to do this, since this step cannot be undone.



3. The transition will be deleted.



See: What is an activity?

Activities

- What is an activity?
- How to add an activity to the flow
- How to add a transition between activities
- Interaction-type activities
- Code-type activities
- Middleware-type activities

What is an activity?

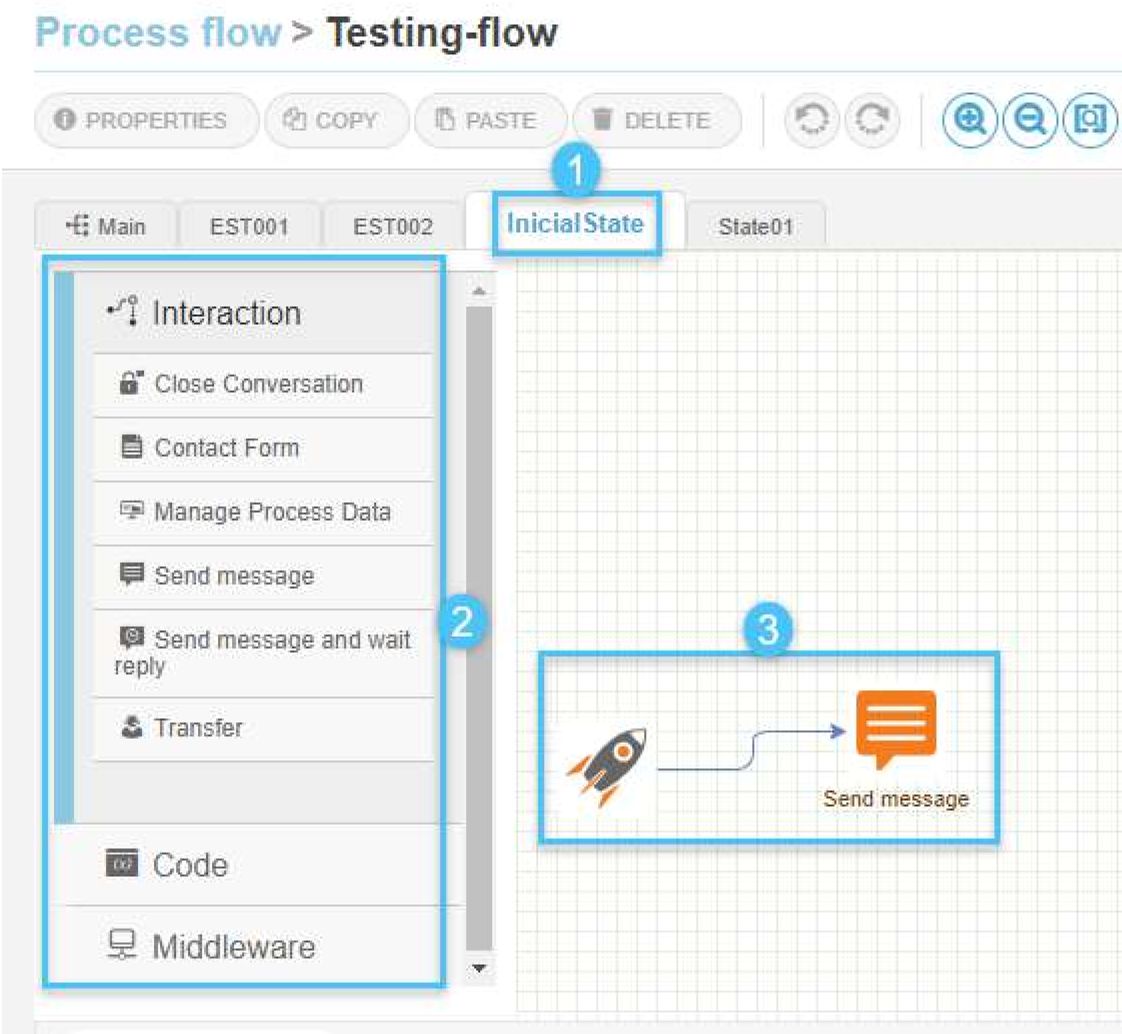
An activity is an action of a certain type that is performed within an IVR state and which fulfills the function of storing information, executing functions or processing the call/interaction in progress.

"Processing the call" refers to its passage through the IVR/chatbot process until it reaches one of the set endings.

Activities are divided into three types:

1. **Interaction-type activities**
2. **Code-type activities**
3. **Middleware-type activities**

They **are defined within the various states (1)**, where we have the possibility of adding **all the necessary activities to the drawing area (2**) in the required logical sequence, linking them via **transitions (3).**

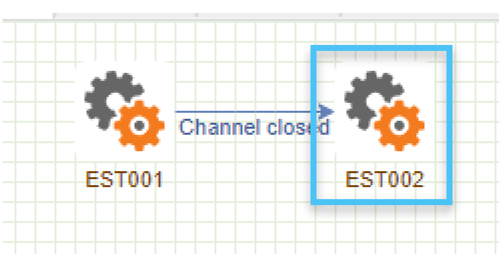


To learn how to add an activity to a flow, see How to add an activity to the flow.

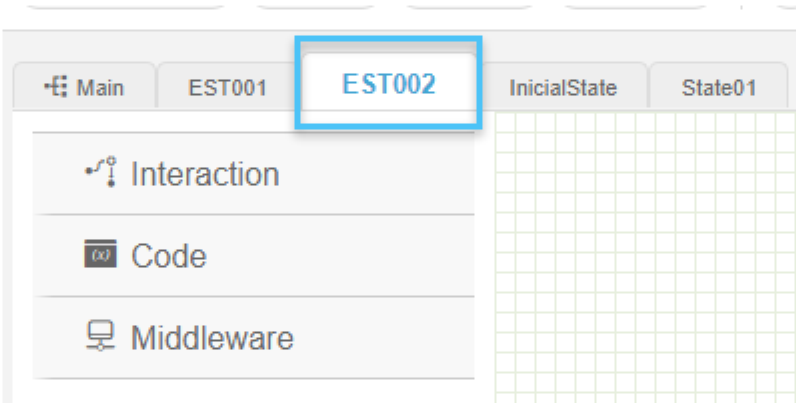
How to add an activity to the flow

The following guide describes how to add an activity to the flow.

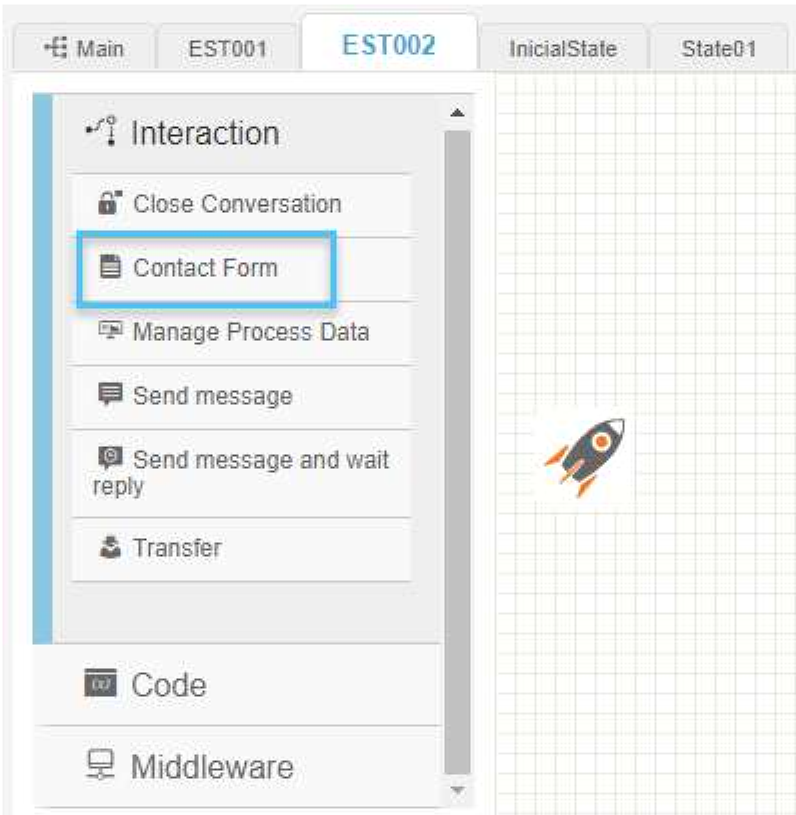
1. Place the cursor over the state to which you wish to add activities and **double click.**



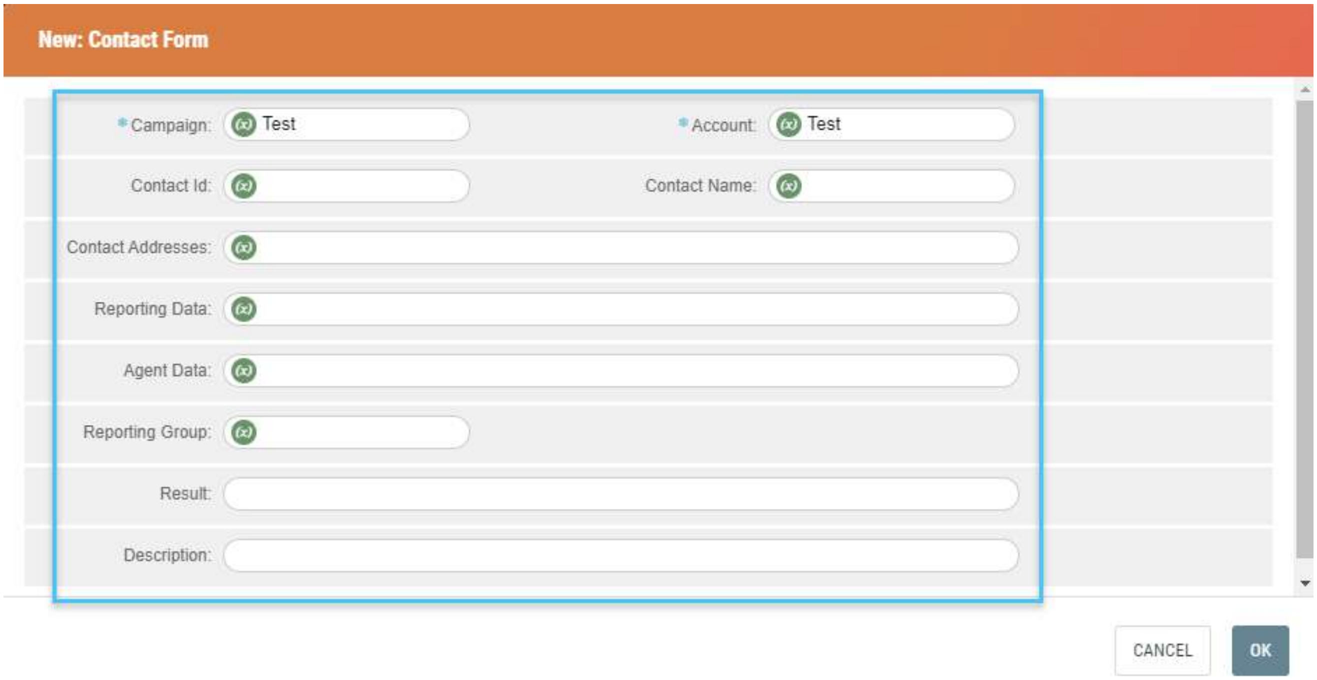
You can also do it by going to the tab for each state:



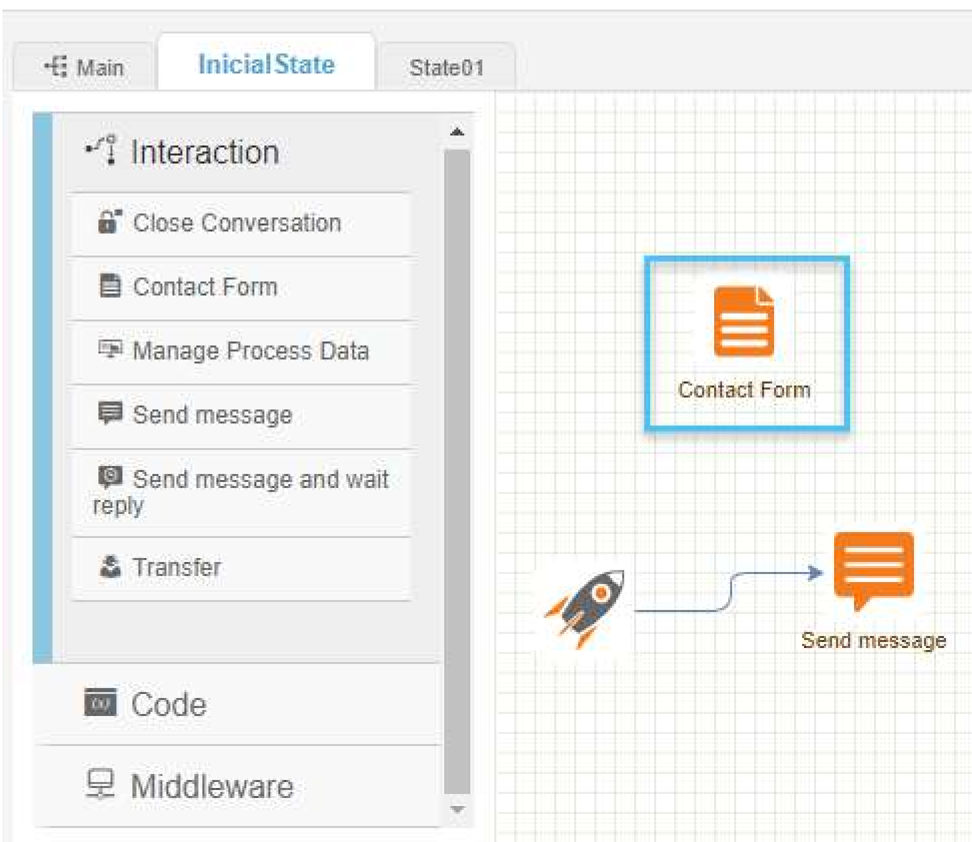
2. There you will see the type of activities available: **Interaction-type activities**, **Code-type activities** and **Middleware-type activities**. Select the type of activity you wish to add and click.



3. Depending on the type of activity, a window will be displayed where you must fill out the data required and click the **"OK"** butto**n.**



4. The activity will be added to the drawing area along with the others. There you can add transitions between the various activities.

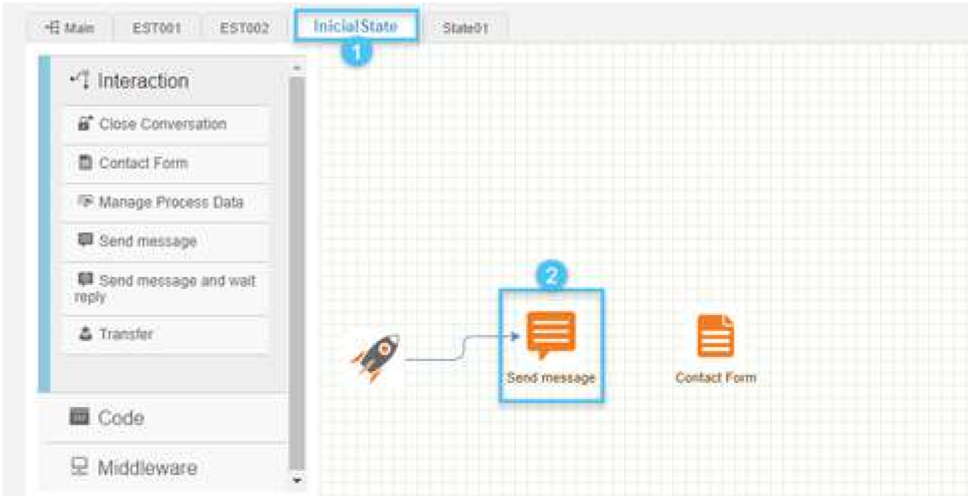


See How to add a transition between activities**.**

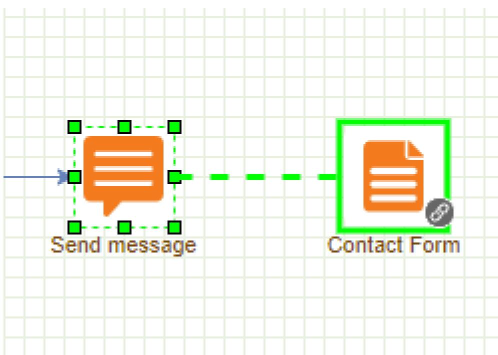
How to add a transition between activities

The following guide describes how to add a transition between activities.

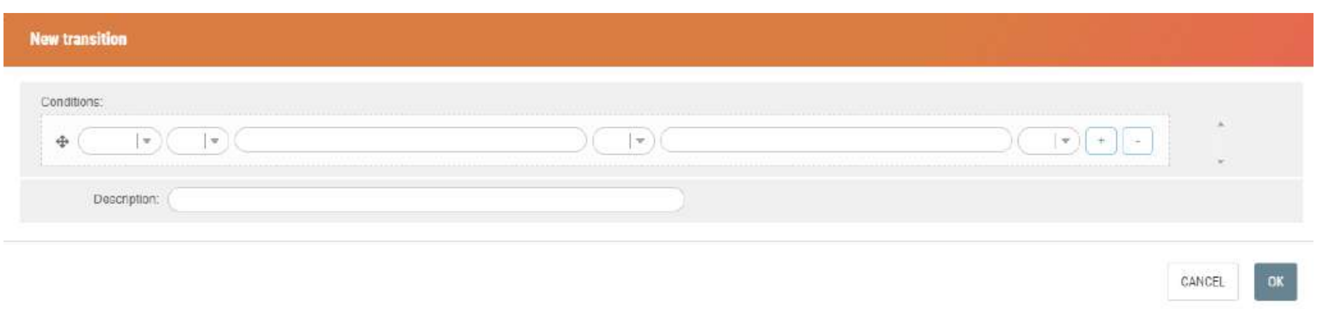
1. Within the state where you want to add the transition **(1)**, select the activity from which it will start **(2).**



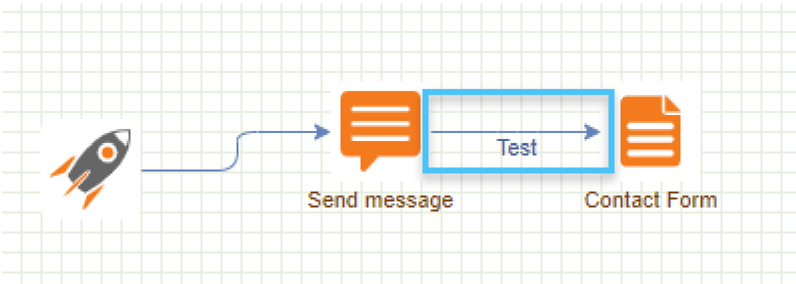
2. The icon  will be displayed; **drag it to link to the next activity.**



3. The following window will be displayed; here you can add conditions (or leave it empty if not required) and a description. Next, click the **"OK"** button**.**



4. The new transition between the two activities has now been added.



For information on how to use the different types of activity, see: Interaction-type activities / Code-type activities / Middleware-type activities.

Interaction-type activities

- Send Message activity (chatbots and IVRs)
- Close Interaction activity (chatbots and IVR)
- Send Message and Wait activity (chatbots and IVR)
- Show/Hide Typing activity (chatbots)
- Transfer activity
- Hold/Unhold activity (IVR only)
- Answer Conversation activity (IVR only)
- Start/Stop Recording activity (IVR only)
- Contact Form activity
- Process Data Manager activity (chatbots and IVR)

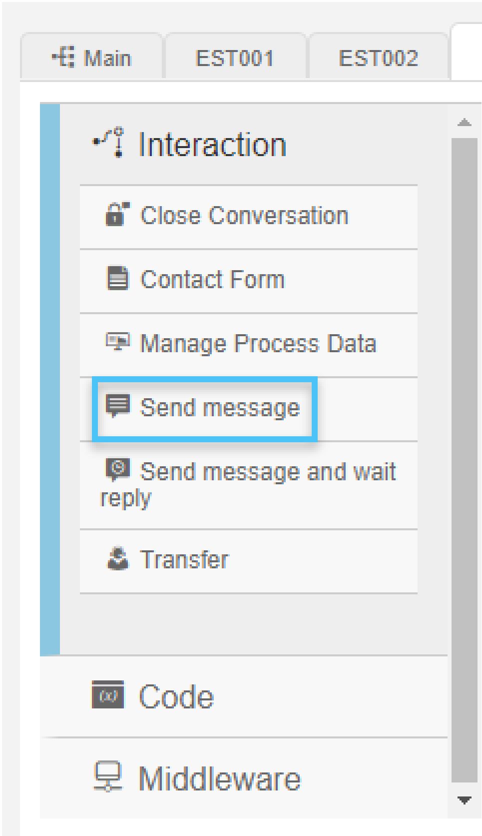
Send Message activity (chatbots and IVRs)

This type of activity sends a message – in an IVR stream it will be an audio message, while in a chatbot it will be a chat message – where the message can be text, text with buttons, image, attachment, a gallery of items with horizontal navigation or a vertical list of items.

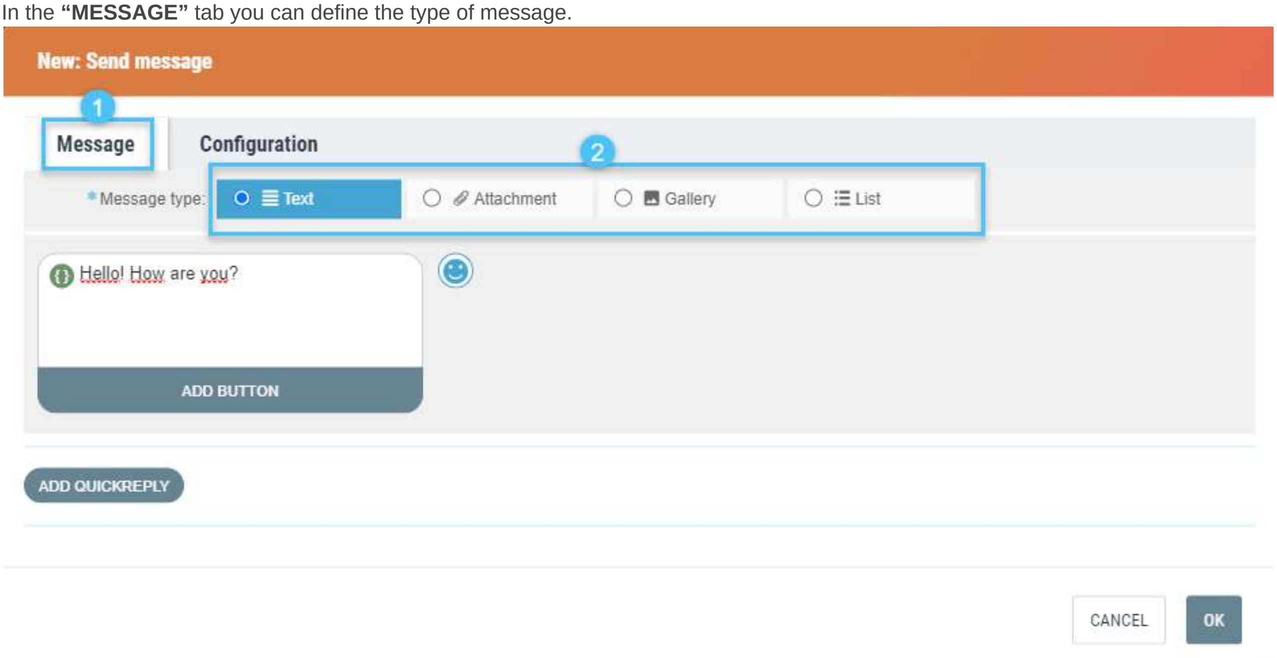
Implementing the Send Message activity

Send Message activity on chatbots

1. On entering a state, there are various activity options; select **Send Message.**

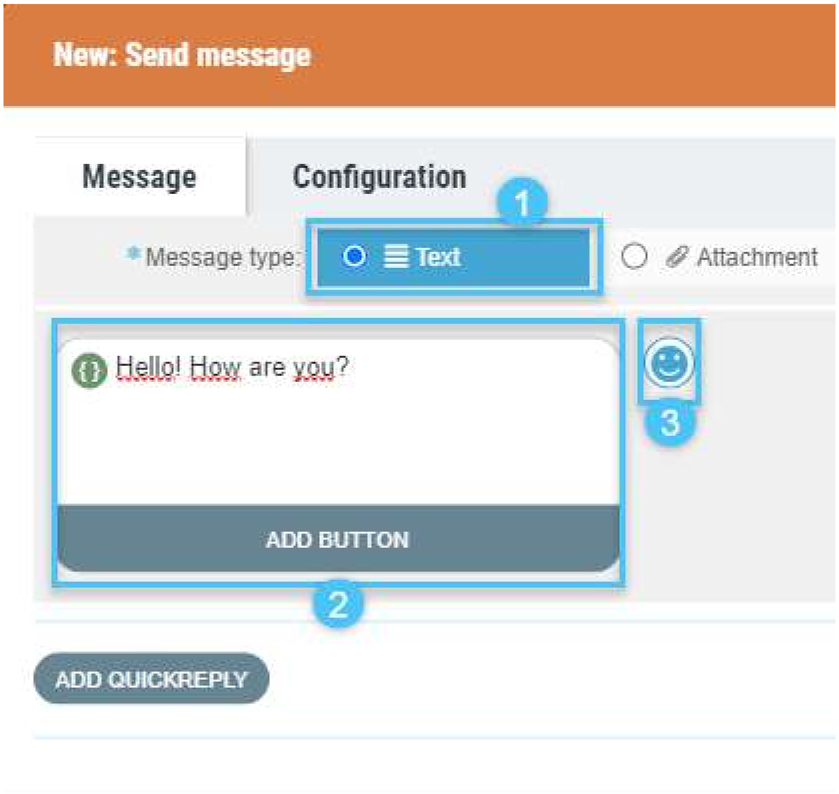


2. In the **"MESSAGE"** tab you can define the type of message.



a. **Text message.**

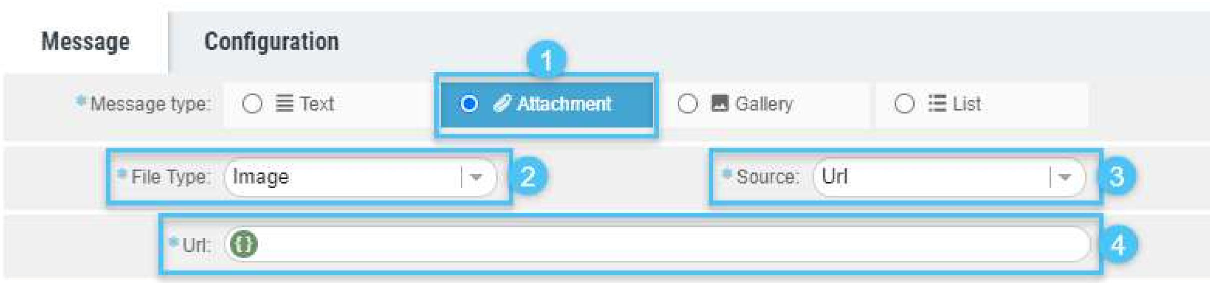
Select the "Text" setting (1) and then **enter the text** that will be sent in the message **(2)**. **You can use emojis (3)**, if you wish.



.

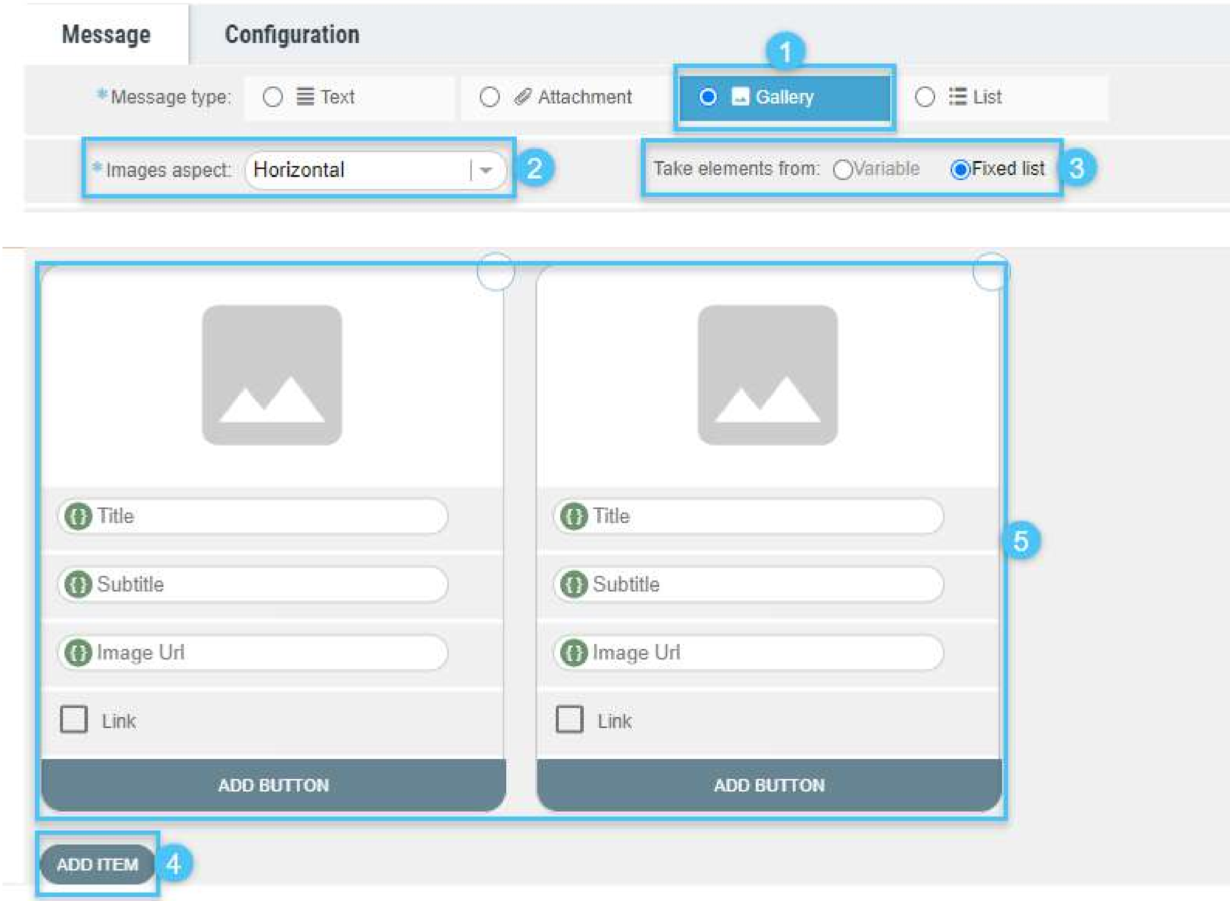
b. **Attachment message.**

Select the "Attachment" setting (1), then **enter the file type** (image/audio/video/file) **(2)**, then **enter the file source** (URL/file shared/upload file) **(3)**, and lastly **enter the data on the source** you have chosen (URL, select shared file, or upload file).



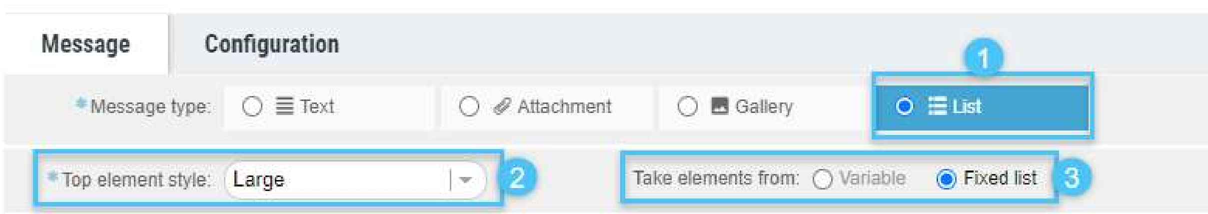
c. **Gallery message.**

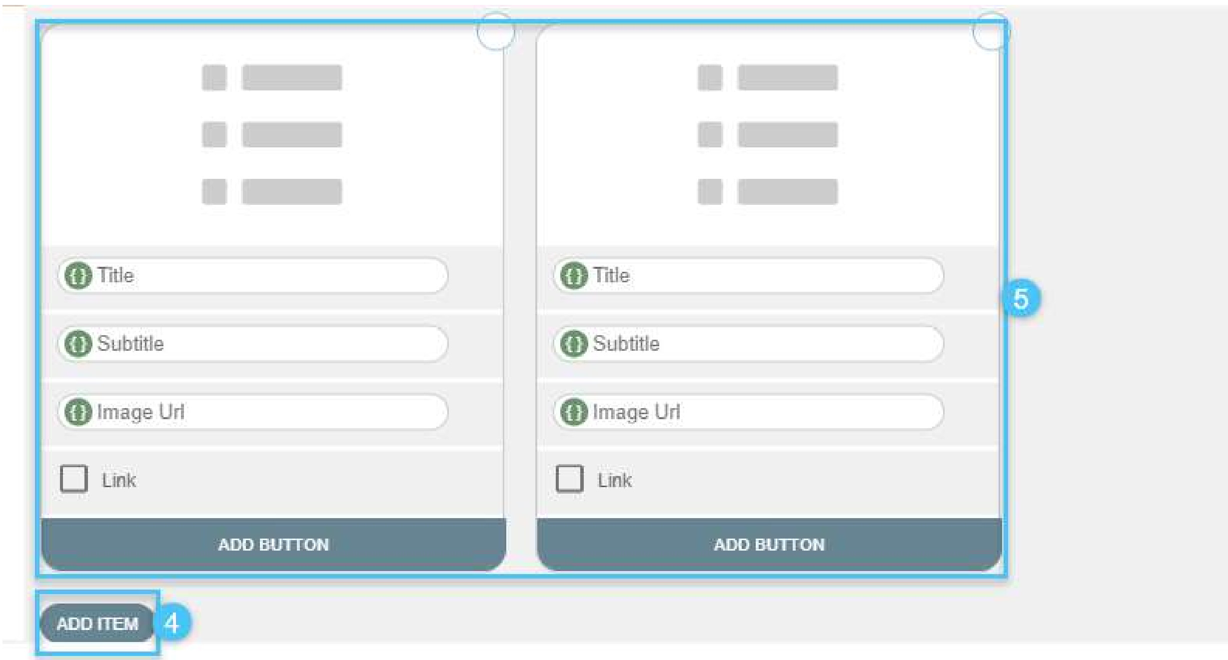
Select the "Gallery" setting (1), then **decide the gallery's format** (horizontal or square) **(2)**, choose **where the items will be obtained from (3)**, click **add item (4)** and **fill out the necessary information** (title, caption and URL of the image; you can use "{{}}" to enter variables).



d. **List message.**

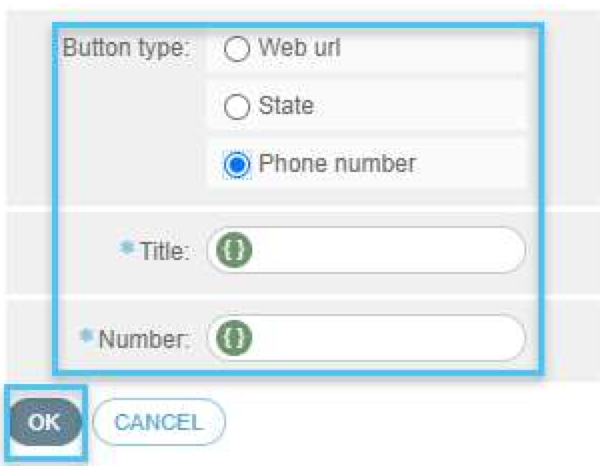
Click the “List” setting (1), then define the style (long or compact) (2), define where to take elements from (3), then to add options click the “add items” button (4) and fill out the necessary information (5).



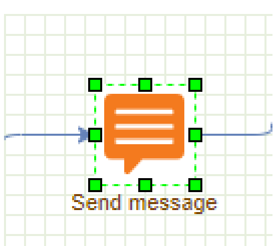


All options allow you to add buttons by clicking on:

The following window will be open for you to fill out the information and click “OK”.

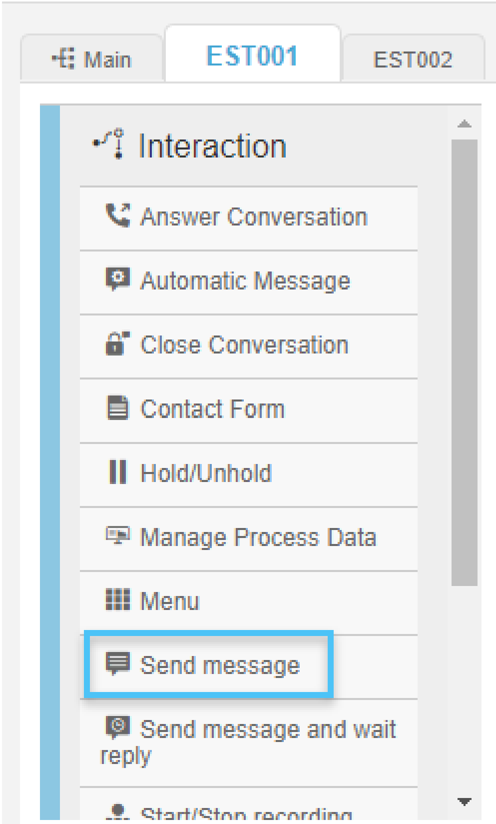


3. Once the message has been configured, it will be added to the flow.

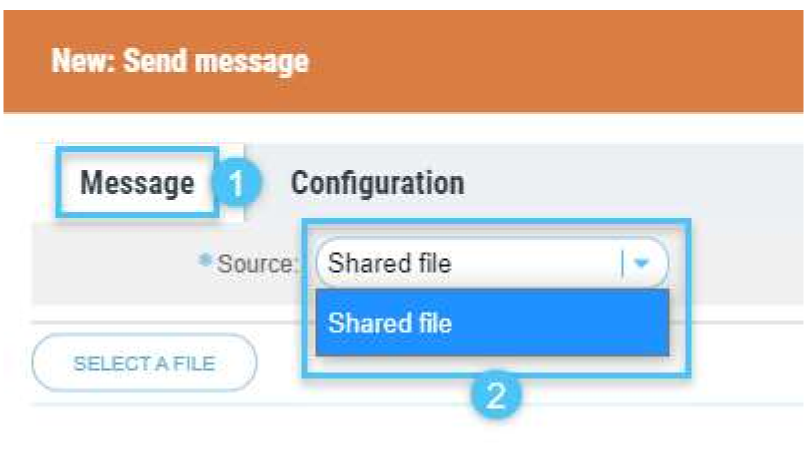


Send Message activity on IVR

1. On entering a state, there are various activity options; select **Send Message**.

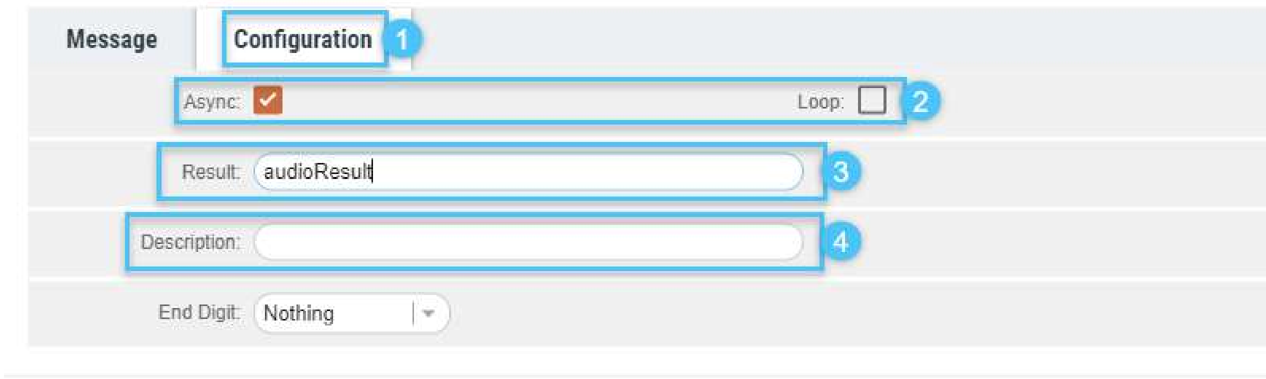


2. In the **"MESSAGE"** tab (1) you must choose the source; you can choose a shared file (previously uploaded to the repository) or upload the file (1).



3. In the **"CONFIGURATION" tab (1)**, you must complete the following information:

(2) Async: to start playback and continue playing or wait until the end of the audio.
(2) Loop: plays looped audio (only available with Async mode on)
(3) Result: allows you to name the variable for storing the result (bool-type indicating success)
(4) Description: you can add a description of the activity



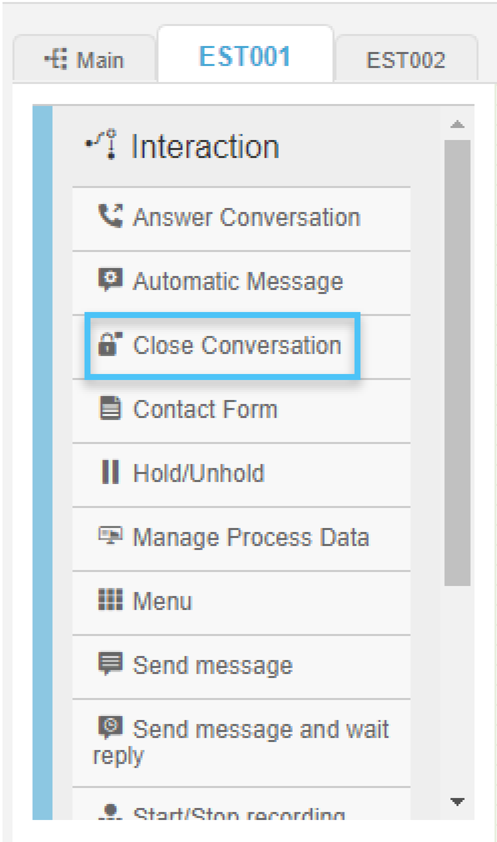
4. Once the message has been configured, it will be added to the flow.

Close Interaction activity (chatbots and IVR)

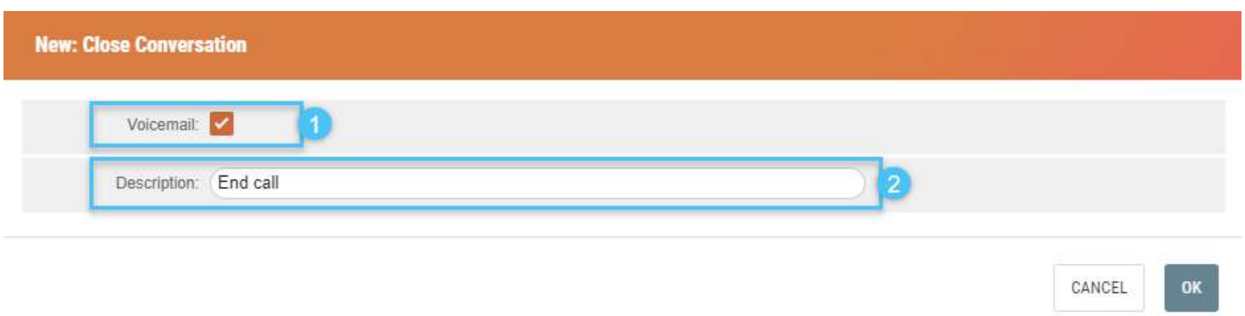
This type of activity is used to end an interaction/call channel.

Implementing a Close Interaction activity

1. On entering a state, there are various activity options; select **Close Interaction.**

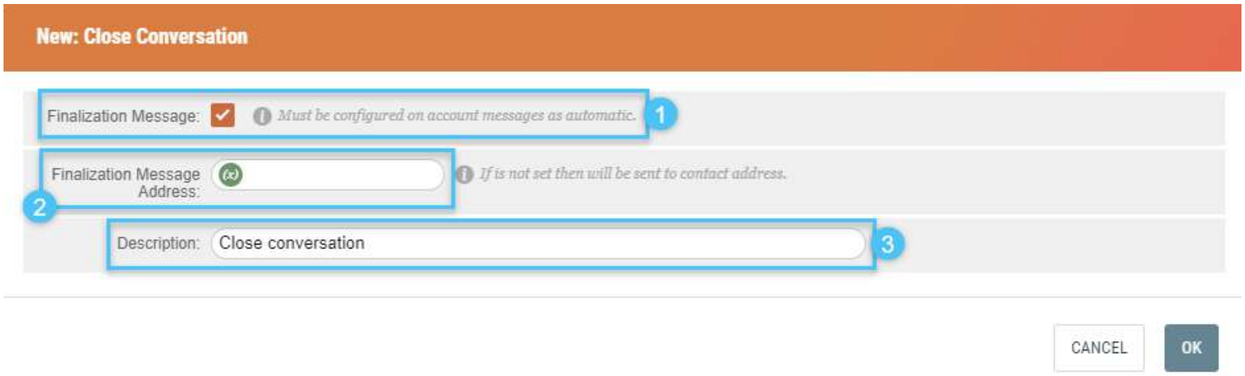


2. There are two possibilities, depending on whether the interaction flow is for a chatbot or for IVR:
   a. See IVR flow case.
      The following window will be displayed, allowing us to direct the client to voicemail when the interaction ends (1). We can also add a description that will appear in the flow (2).

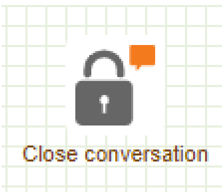


   b. See chatbot flow case.
      The following window will be displayed, allowing us to **send a completion message** (it must be previously configured) **(1)**. If we wish, we can **enter an email** where the message will be sent (if the field is left empty, it is sent to the contact's address) **(2)**, and

we can also **add a description** that will appear in flow **(3).**



3. Once configured, the activity will appear in our flow.



Send Message and Wait activity (chatbots and IVR)

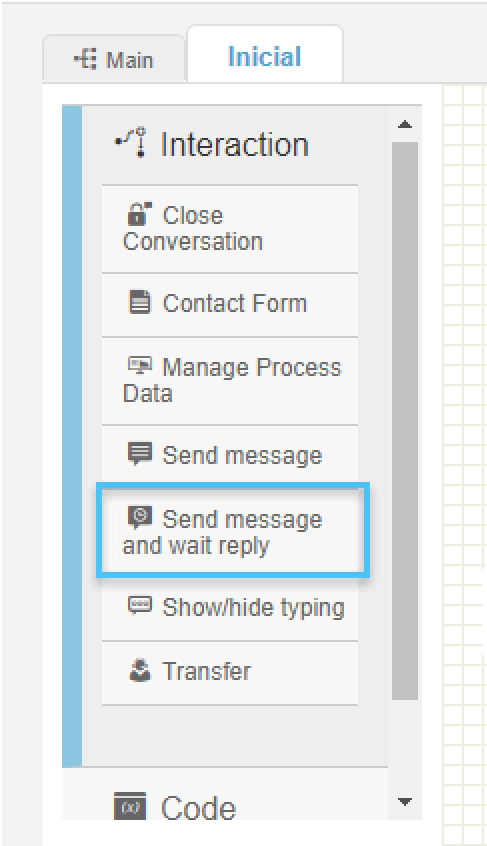
Allows the user to send a message and customize the waiting time; where the message can consist of text, text with buttons, image, attachment, an item gallery with horizontal navigation or a vertical list of items.

It can be used for both IVR and chatbot flows.

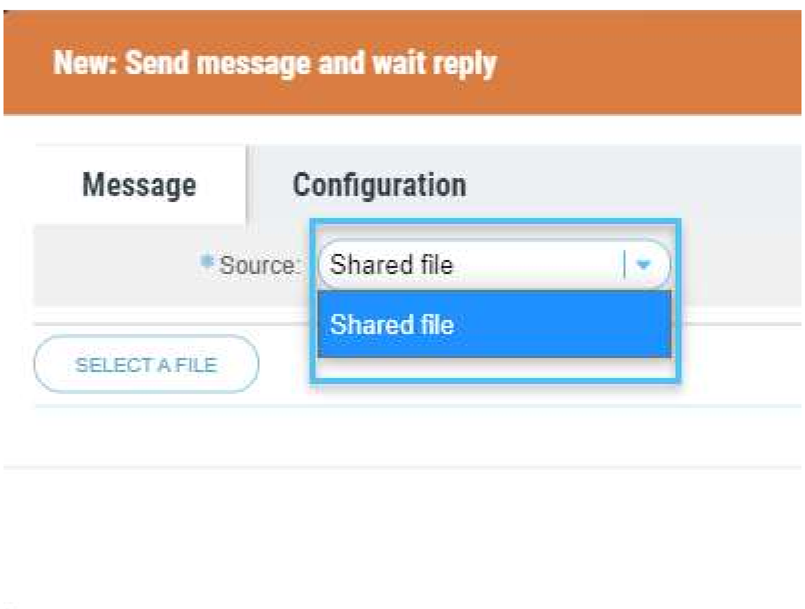
Implementing the Send Message and Wait activity

See implementation in IVR flows

1. On entering a state, there are various activity options; select **Send message and wait reply.**

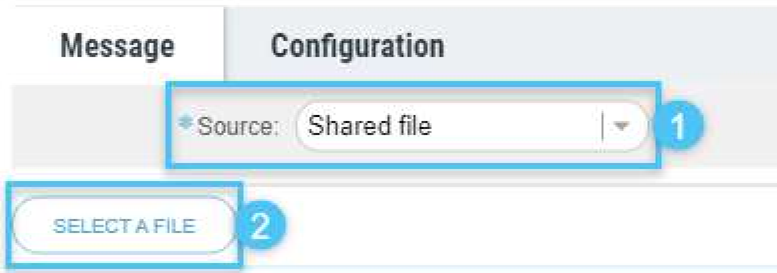


2. A window will open where you must first **select the source of the message file to be sent**; it can be a shared file from the repository or you can upload your own file.

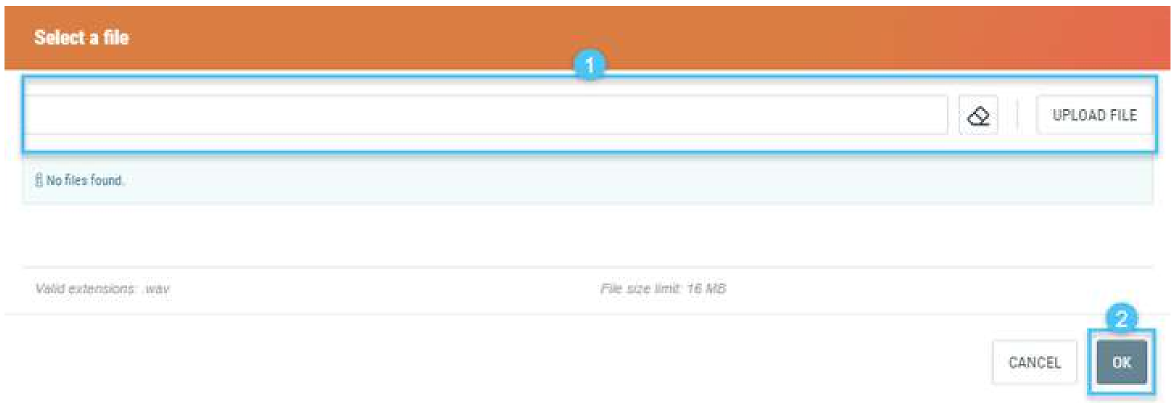


a. See shared file option

i. Select the shared file option (1), and then click on the "SELECT A FILE" button (2).

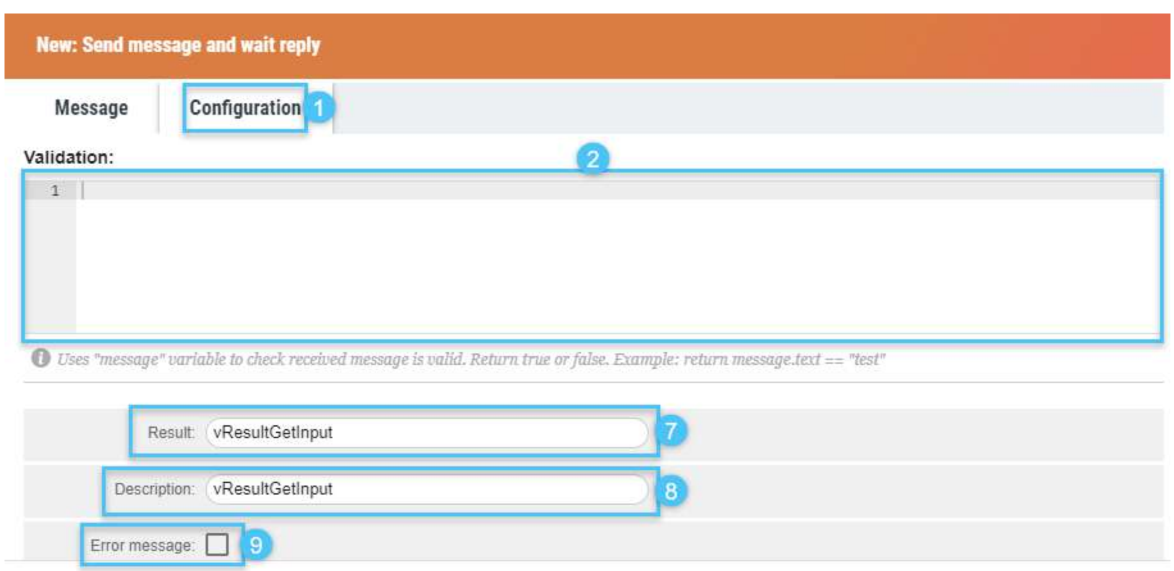


ii. The following window will open; locate the audio file (1) and then click the "OK" button (2).



iii. Go to the **"CONFIGURATION"** tab (1).

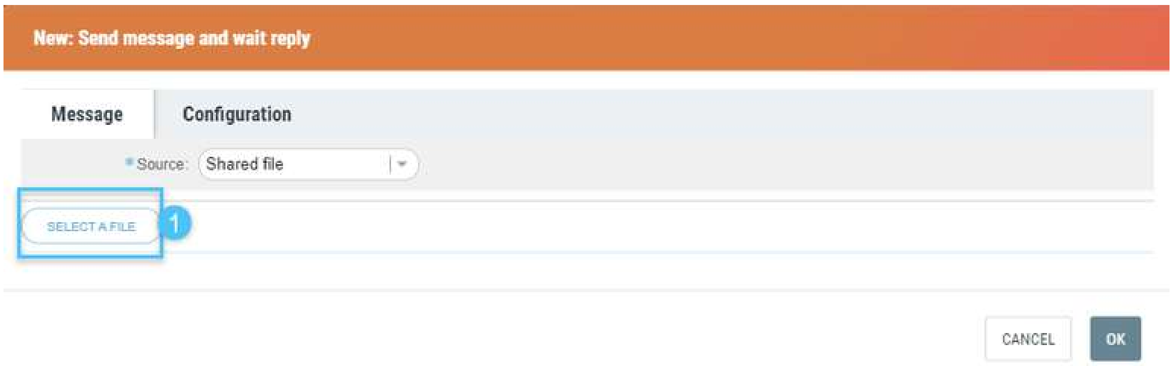
(2) Validation: allows you to use variables (such as the message variable to check whether the message received is valid).
(3) Number of Retries: allows you to enter the number of attempts to send the message in case of no response.
(4) Timeout: determines the waiting time for the client's response after sending the message.
(5) Max. Digits: determines the maximum number of digits to be entered by the user.
(6) End Digit: determines the digit for ending the capture.
(7) Result: allows you to save the result of the message in a variable.
(8) Description: allows you to enter a description of the result.
(9) Error Message: enabling this option allows an error message to be sent to the client (you must select from the repository or upload a new one).

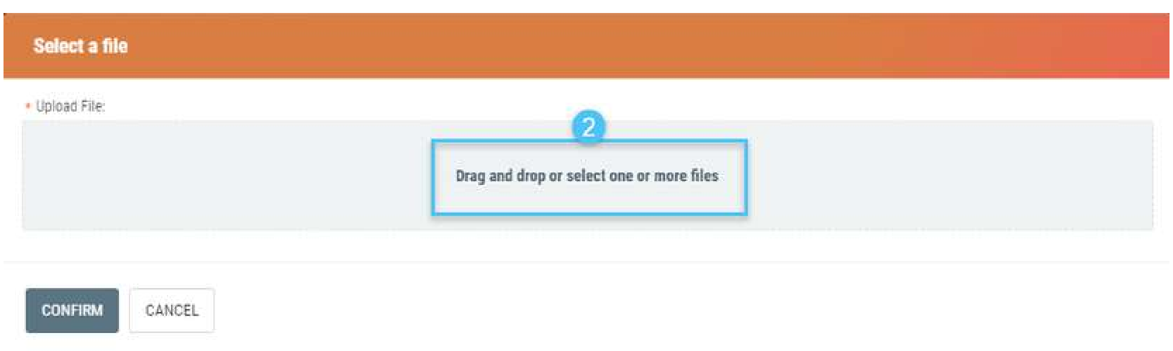


iv. Once the activity has been configured, it will be added to the IVR flow.

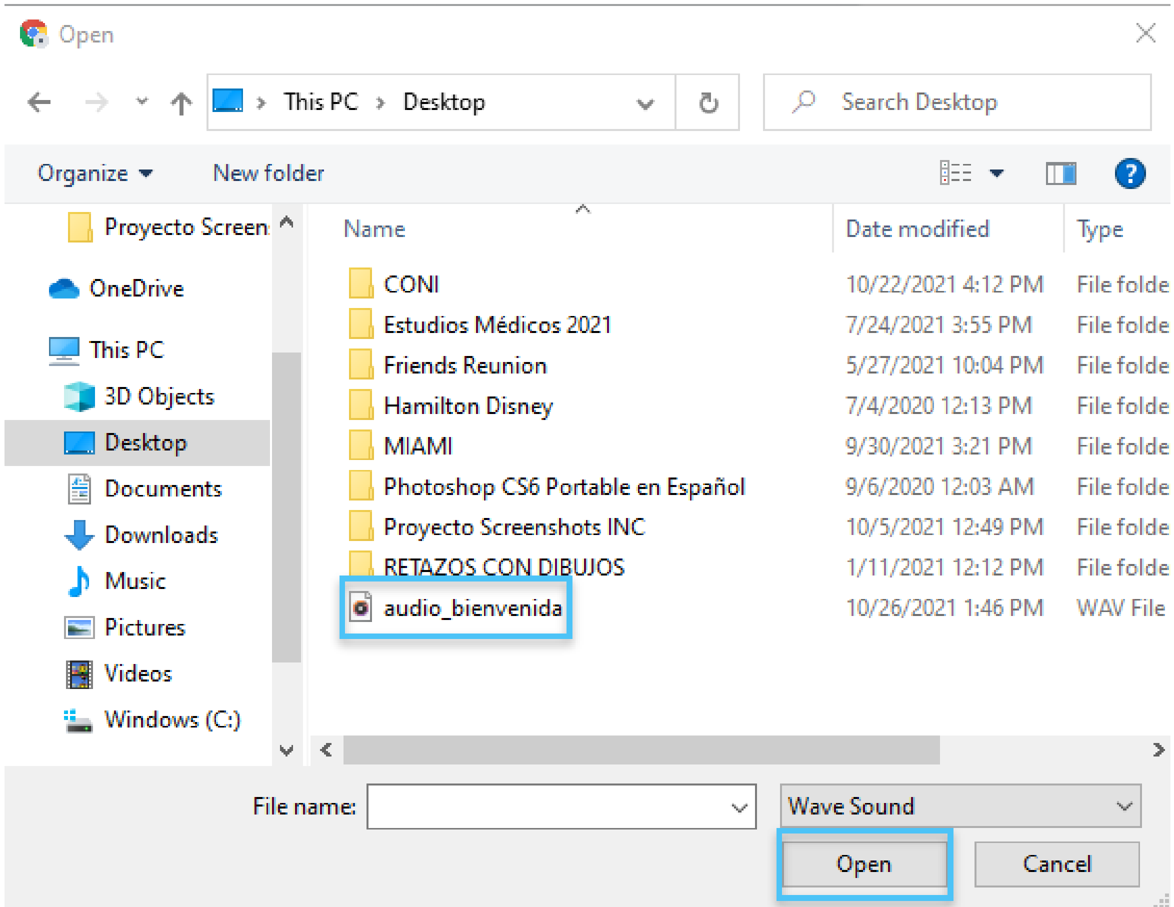
b. See Upload File option

i. Select the Upload File option (1), and then click on the "Drag & Drop or select a file" button (2) to upload the file (you can also drag it into the same box).



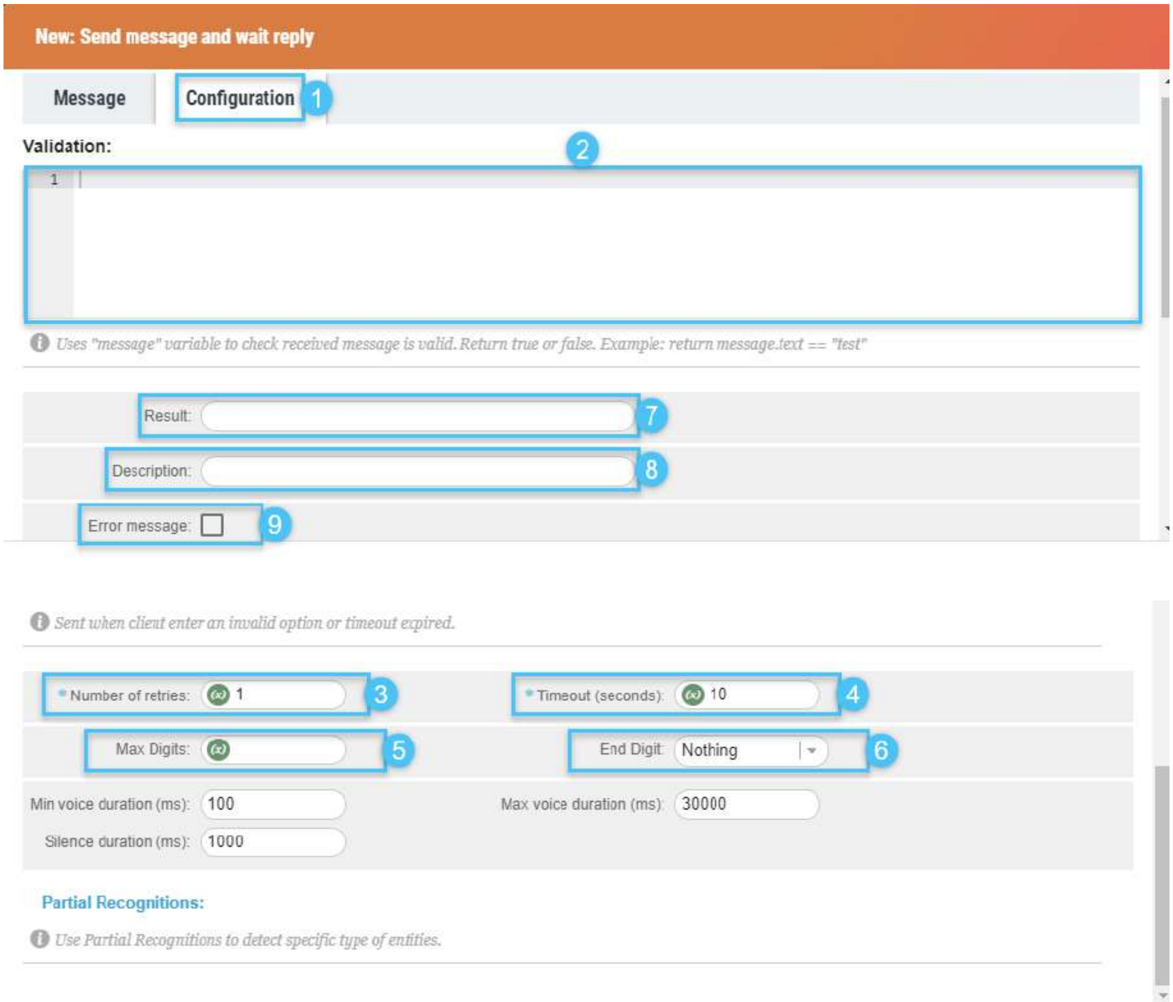


ii. A window will open where you must select the file and click "Open".



iii. Go to the **"SETTINGS"** tab (1).

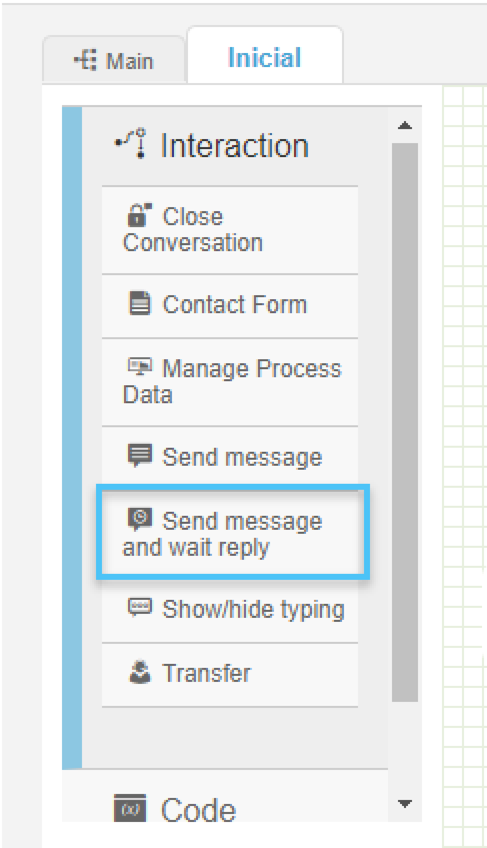
(2) Validation: allows you to use variables (such as the message variable to check whether the message received is valid).
(3) Number of Retries: allows you to enter the number of attempts to send the message in case of no response.
(4) Timeout: determines the waiting time for the client's response after sending the message.
(5) Max. Digits: determines the maximum number of digits to be entered by the user.
(6) End Digit: determines the digit for ending the capture.
(7) Result: allows you to save the result of the message in a variable.
(8) Description: allows you to enter a description of the result.
(9) Error Message: enabling this option allows an error message to be sent to the client (you must select from the repository or upload a new one).



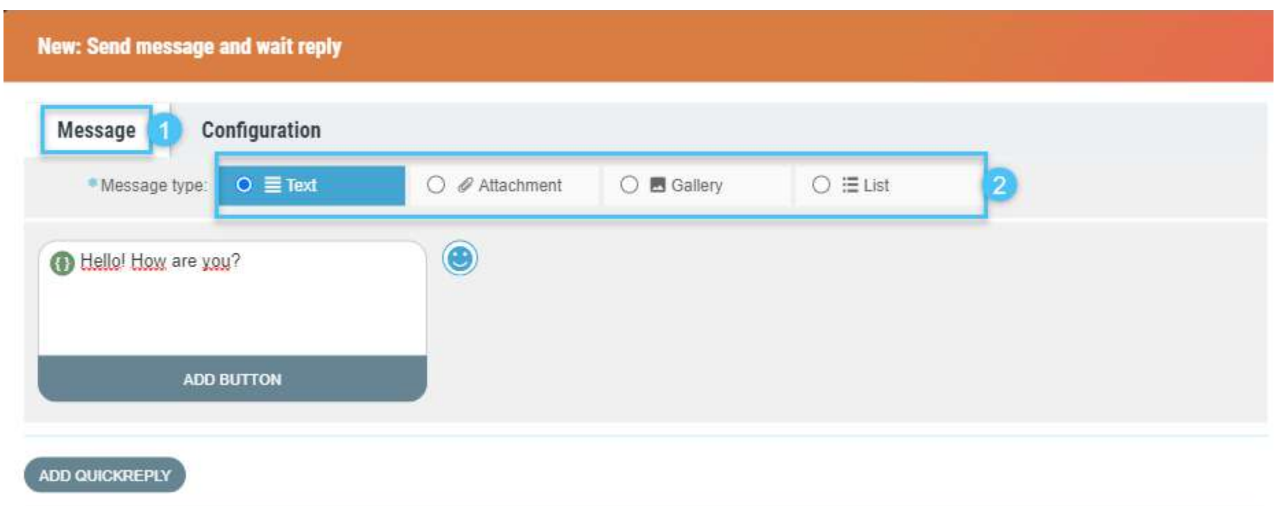
iv. Once the activity has been configured, it will be added to the IVR flow.

See implementation in chatbots

1. On entering a state, there are various activity options; select **Send message and wait reply.**

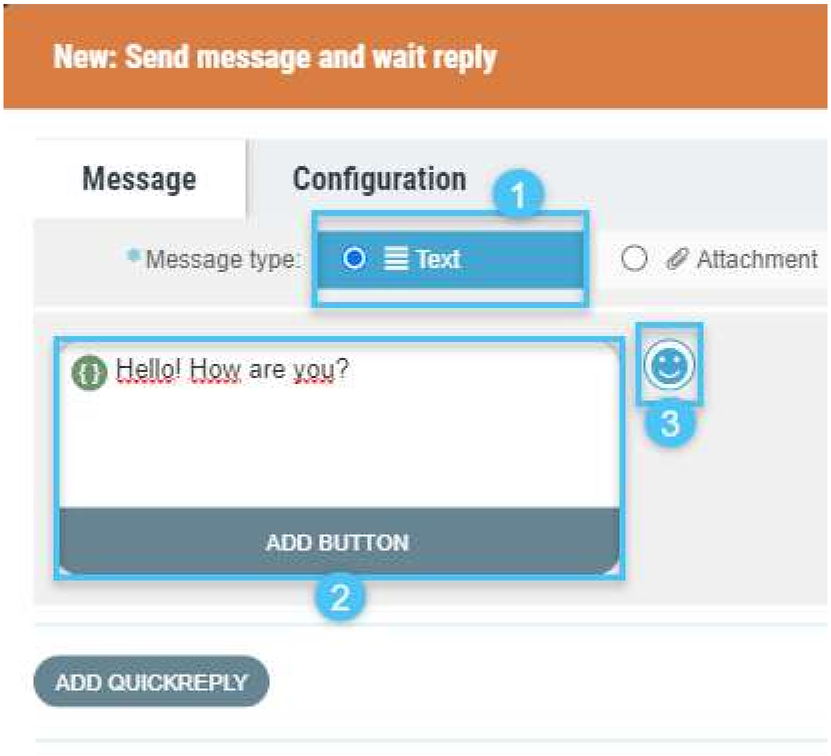


2. In the **"MESSAGE"** tab you can define the type of message.



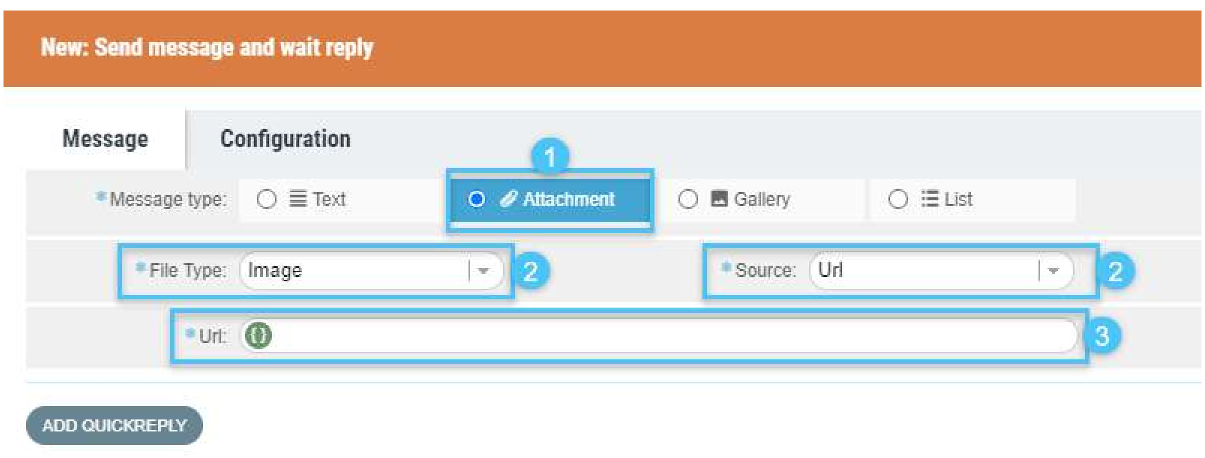
a. See Text Message

Select the "Text" setting (1) and then enter the text that will be sent in the message (2). You can use emojis (3), if you wish.



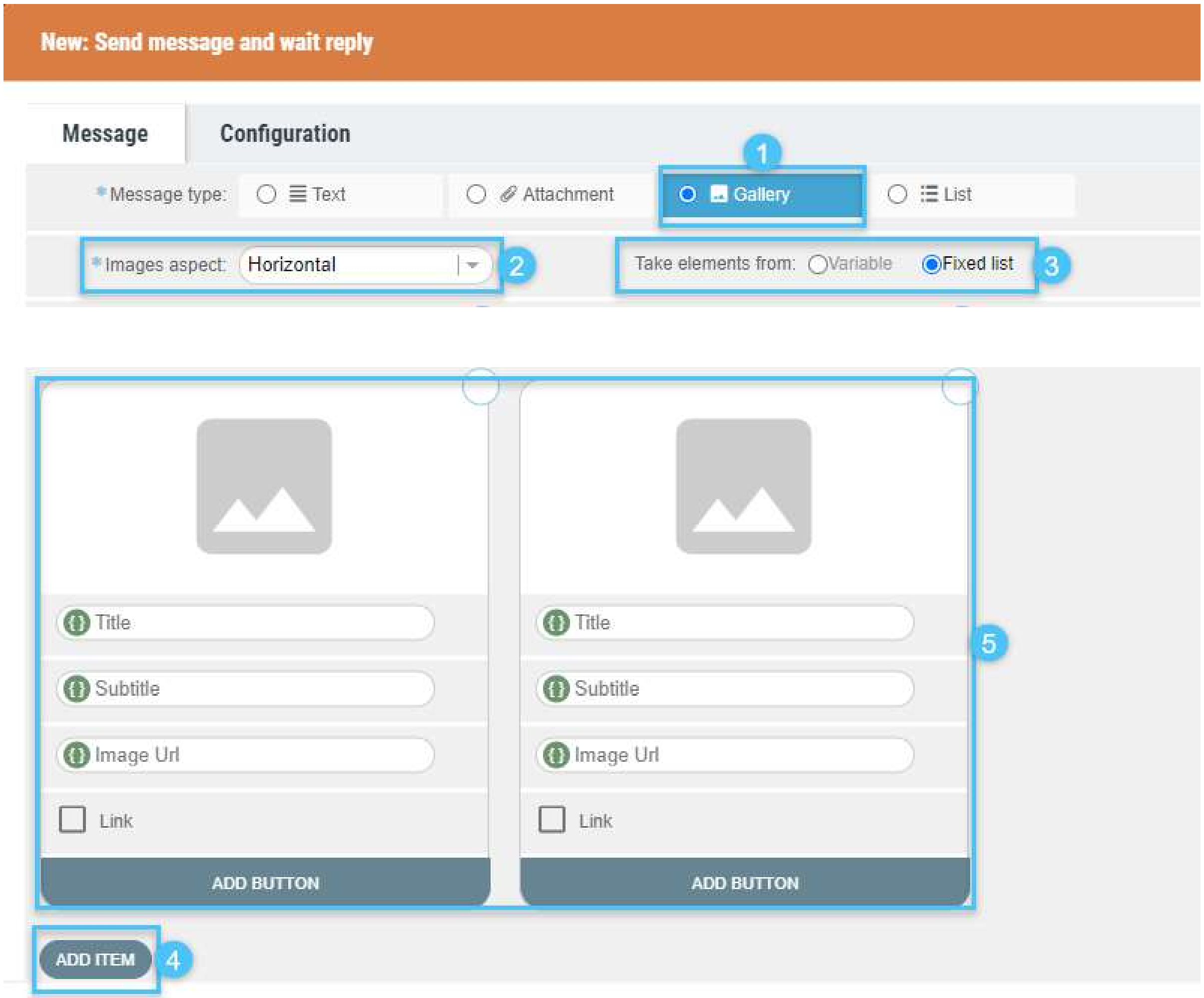
b. See Attachment Message

Select the "Attachment" setting (1), then **enter the file's type** (image/audio/video/file) **(2)**, then **enter the file source** (URL /shared file/upload file) **(3)**, and lastly, **enter the data of the source** you have chosen (URL, select shared file, or upload file)



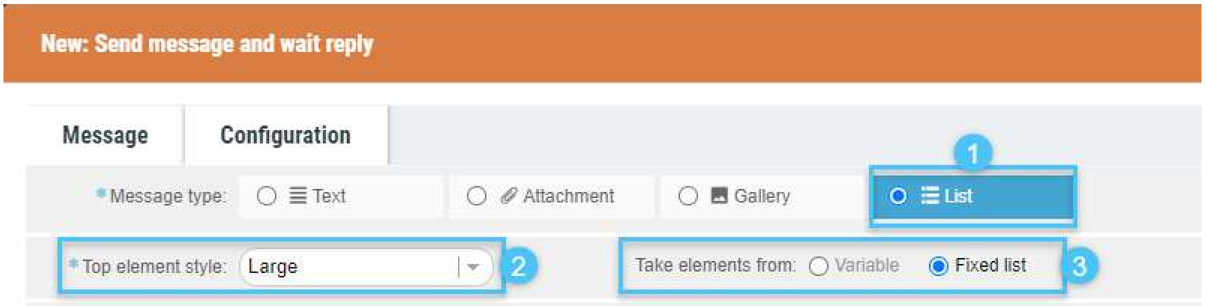
c. See Gallery Message

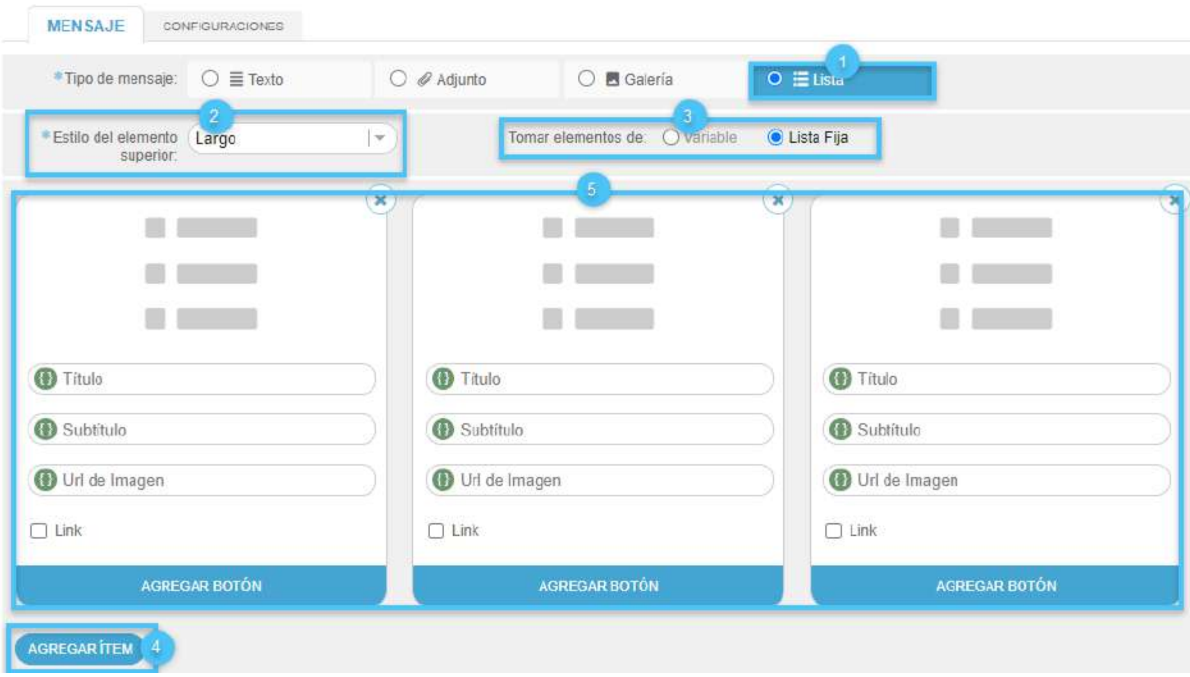
Select the "Gallery" setting (1), then **decide the gallery's format** (horizontal or square) **(2)**, choose **where the elements will be obtained from (3)**, click **"add item" (4)** and **fill out the necessary information** (title, subtitle and URL of the image; you can use " {{}} " to enter variables).



d. View List Message

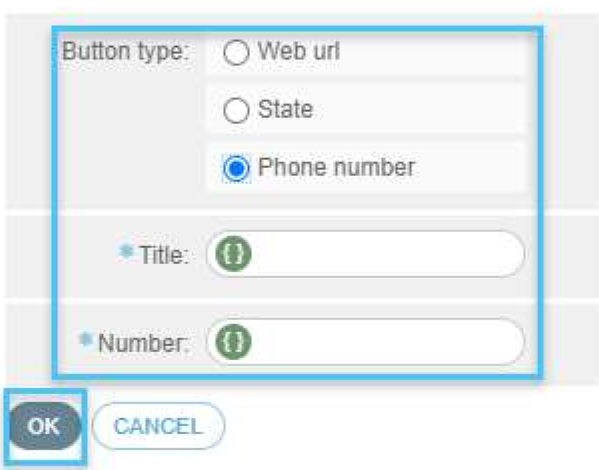
Click the "List" setting (1), then **define the style (long or compact) (2)**, **define where to take elements from (3)**, then to add options **click the "add items" button (4)** and **fill out the necessary information (5)**.





3. All options allow you to add buttons by clicking on:

The following window will be open for you to fill out the information and click “OK”.



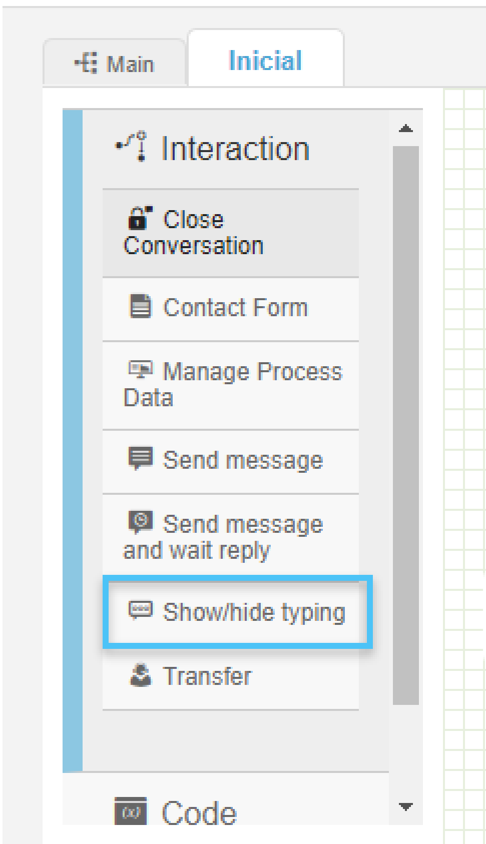
4. Once the message has been configured, it will be added to the flow.

Show/Hide Typing activity (chatbots)

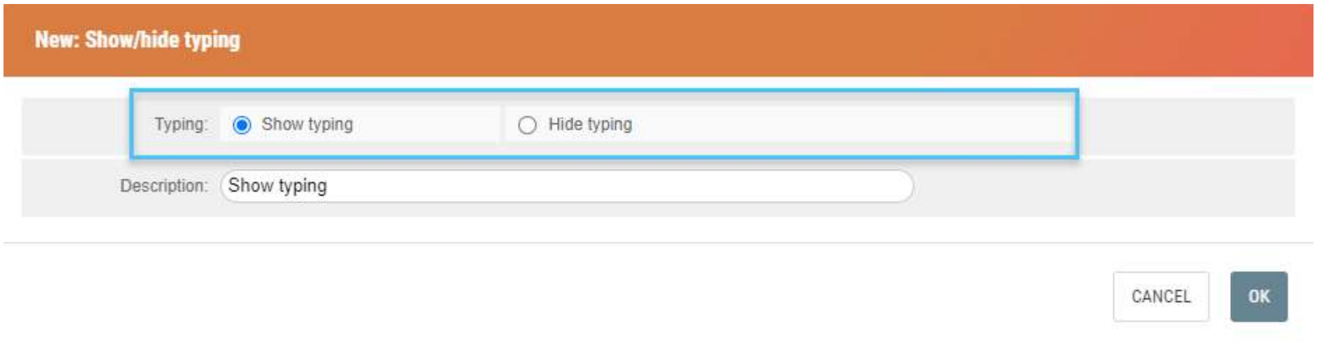
This activity allows the chatbot typing action to be shown or hidden. It is only available for chatbot flows (not available for IVR).

Implementing the Send Message activity

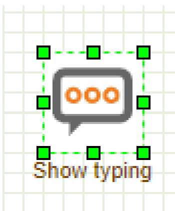
1. On entering a state, there are various activity options; select **Send Message.**



2. The following window will be displayed. You must select whether you want typing monitoring to start or stop; you can add a description if you wish.



3. The activity will be incorporated in the flow.



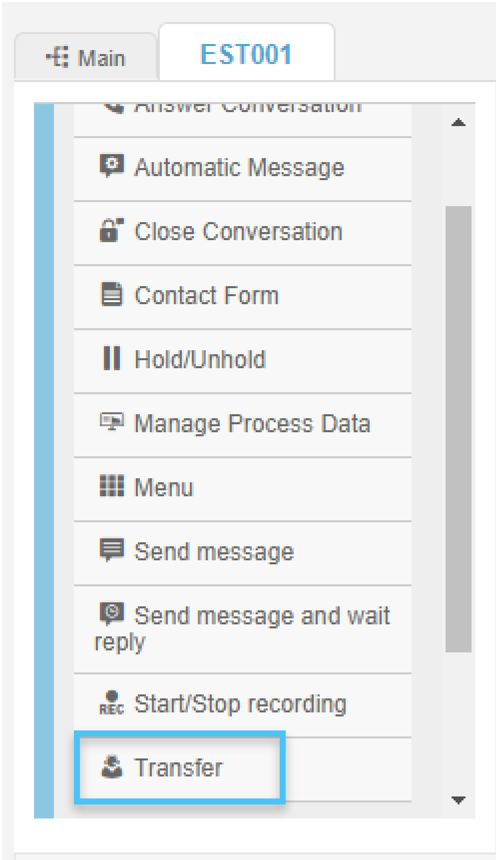
Transfer activity

This activity allows you to transfer the conversation to a Contact Center, agent, campaign, or campaign and agent. This option is normally used when the chatbot or voice assistant is unlikely to have an adequate response to the user's query.

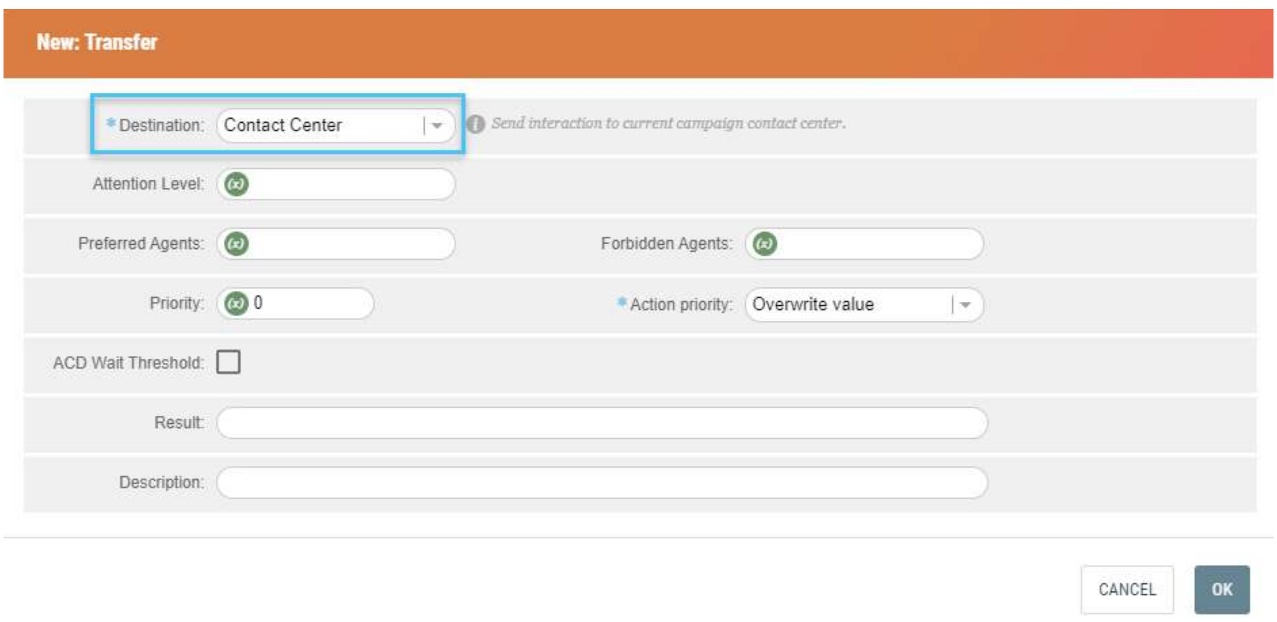
Transfer activity implementation

See Transfer activity in IVR flows

1. On opening a state tab, there are various activity options; select **Transfer.**



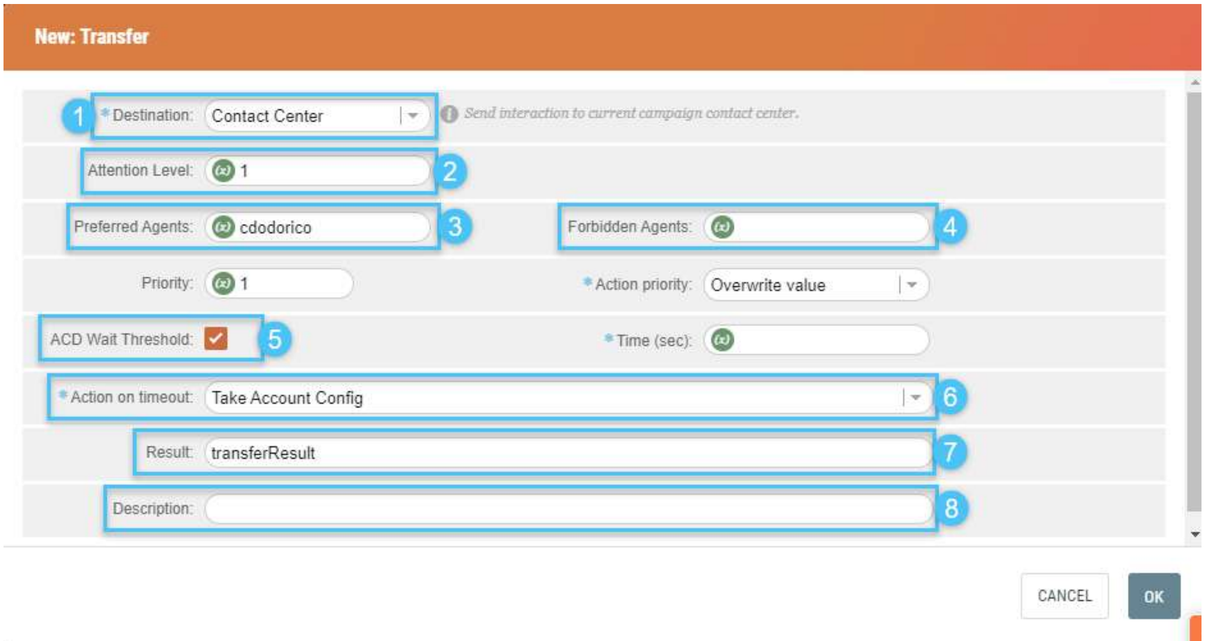
2. The following window will open. First **select the destination** (Contact Center/Agent/Campaign/Campaign and Agent/Number).



a. Contact Center

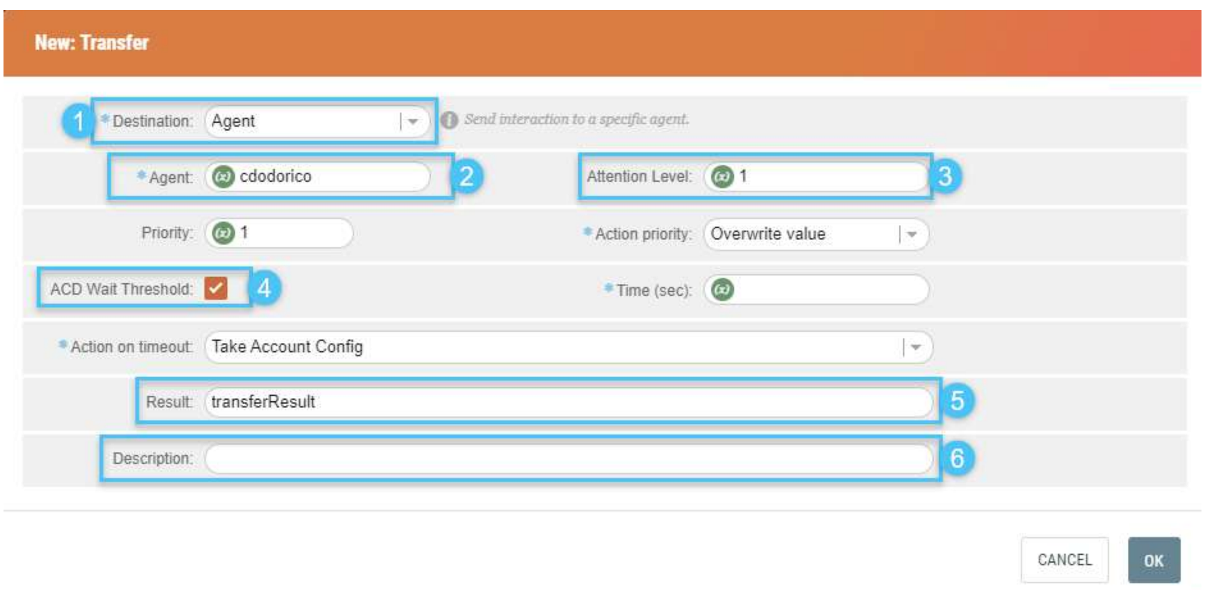
(1) Select the **Contact Center** destination.
(2) Attention level: sets the level of attention with which the call will be transferred to the contact center.
(3) Preferred Agents: allows you to make arrangements with certain agents to prioritize them for sending them the call.
(4) Forbidden Agents: allows you to make an arrangement with agents who are to be excluded when transferring the call.
(5) ACD wait threshold: sets how many seconds to wait for an agent.
(6) ///Queue on timeout: if this option is enabled, it allows the call to be sent to the queue if it is not answered by the agent

(timeout).
(7) Result: allows you to state the name of a variable for storing the result.
(8) Description: allows you to enter a description of the activity.



b. Agent

(1) Destination: Enter the **Agent** option.
(2) Agent: enter the ID of the agent to whom the call will be transferred.
(3) Attention level: sets the level of attention with which the call will be transferred to the contact center.
(4) ACD wait threshold: sets how many seconds to wait for an agent.
(5) Result: allows you to state the name of a variable for storing the result.
(6) Description: allows you to enter a description of the activity.



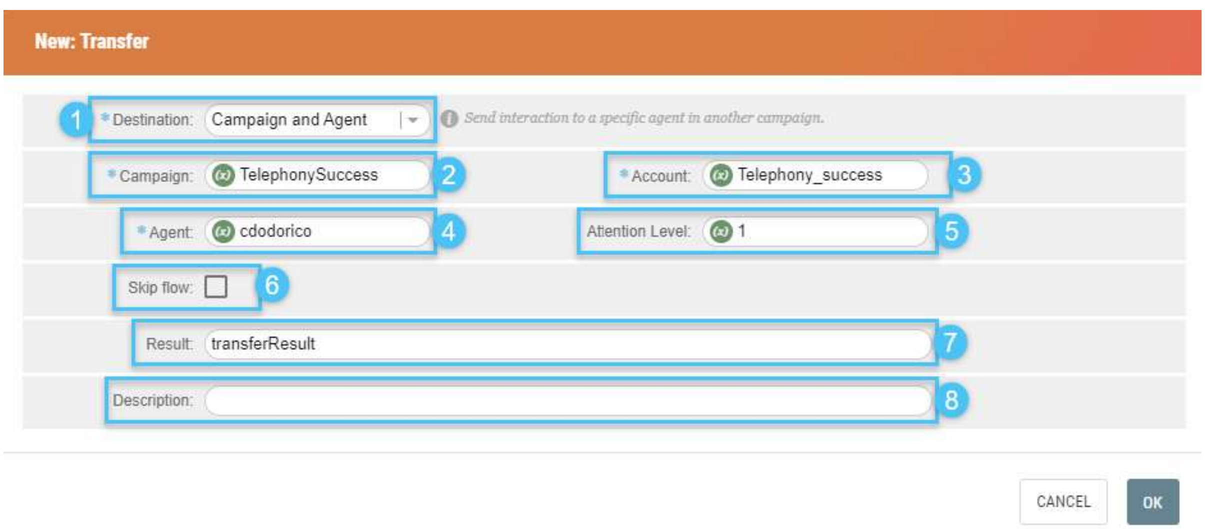
c. Campaign

(1) Destination: select the Campaign option.
(2) Campaign: enter the ID of the campaign to which the call will be transferred.
(3) Account: enter the ID of the telephony account associated with the campaign.
(4) Attention level: sets the level of attention with which the call will be transferred to the contact center.
(5) Preferred agents: allows you to make arrangements with certain agents to prioritize them for sending them the call.
(6) Forbidden agents: allows you to make an arrangement with agents who are to be excluded when transferring the call.

(7) Skip flow: if this option is enabled, it allows you to skip the flow of the target campaign and go directly to the contact center.
(8) Result: allows you to state the name of a variable for storing the result.
(9) Description: allows you to enter a description of the activity.

d. Campaign and Agent

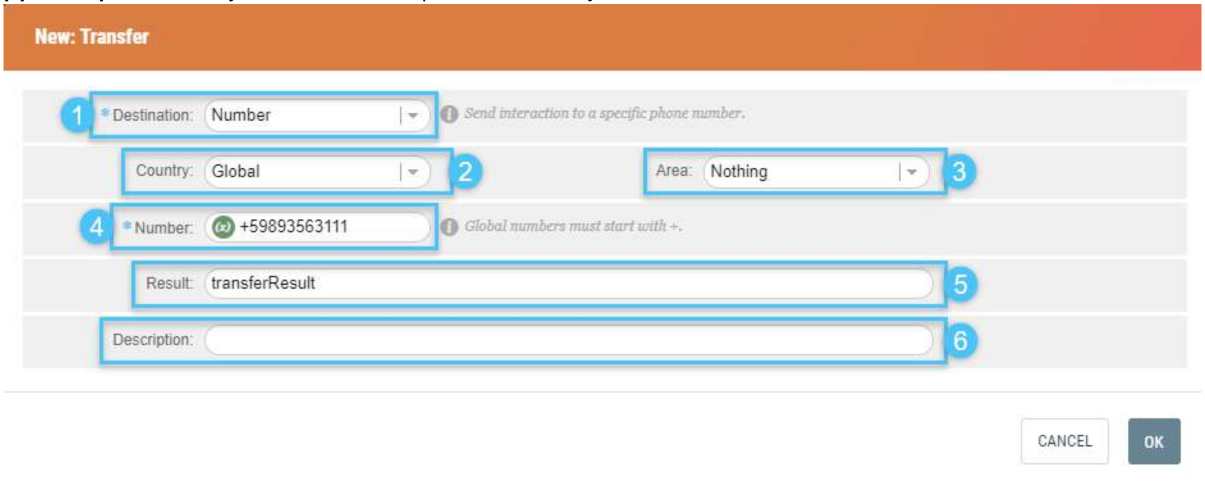
(1) Destination: select the Campaign and Agent option.
(2) Campaign: enter the ID of the campaign to which the call will be transferred.
(3) Account: enter the ID of the telephony account associated with the campaign.
(4) Agent: enter the ID of the agent to whom the call will be transferred.
(5) Attention level: sets the level of attention with which the call will be transferred to the contact center.
(6) Skip flow: if this option is enabled, it allows you to skip the flow of the target campaign and go directly to the contact center.
(7) Result: allows you to state the name of a variable for storing the result.
(8) Description: allows you to enter a description of the activity.



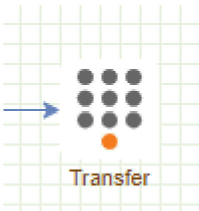
e. Number

(1) Destination: select the Number option.
(2) Country: select the country to which the number applies or the Global option.
(3) Area: select the area to which the number applies or None.
(4) Number: indicates the number to which the call will be transferred. If no country or area is stated, the number must begin with "+" plus the prefix.

(5) Result: allows you to state the name of a variable for storing the result.
(6) Description: allows you to enter a description of the activity.

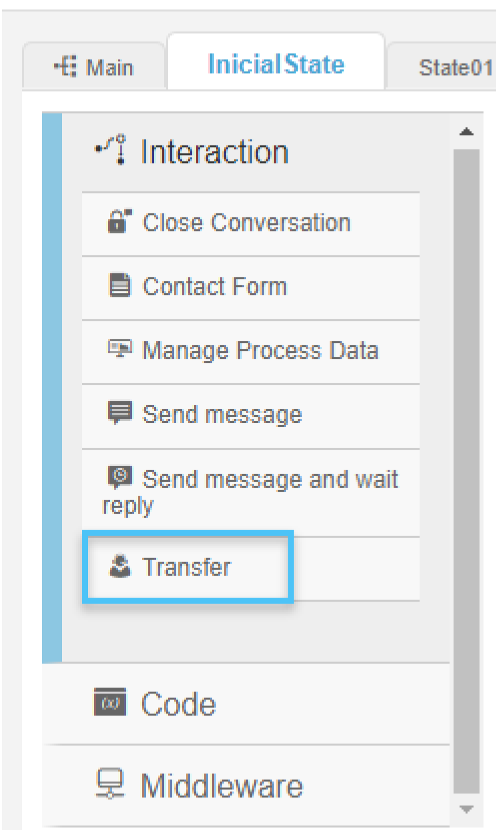


3. Once the transfer type is configured, the activity will be added to the IVR flow

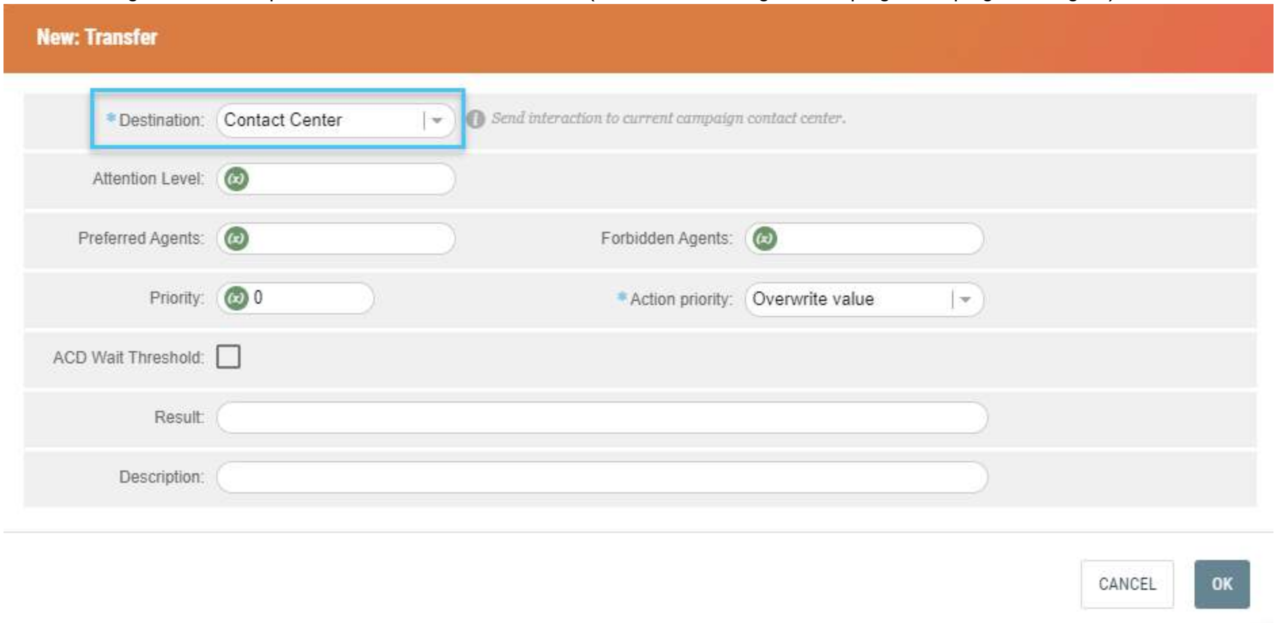


See Transfer activity in chatbots

1. On opening a state tab, there are various activity options; select **Transfer.**

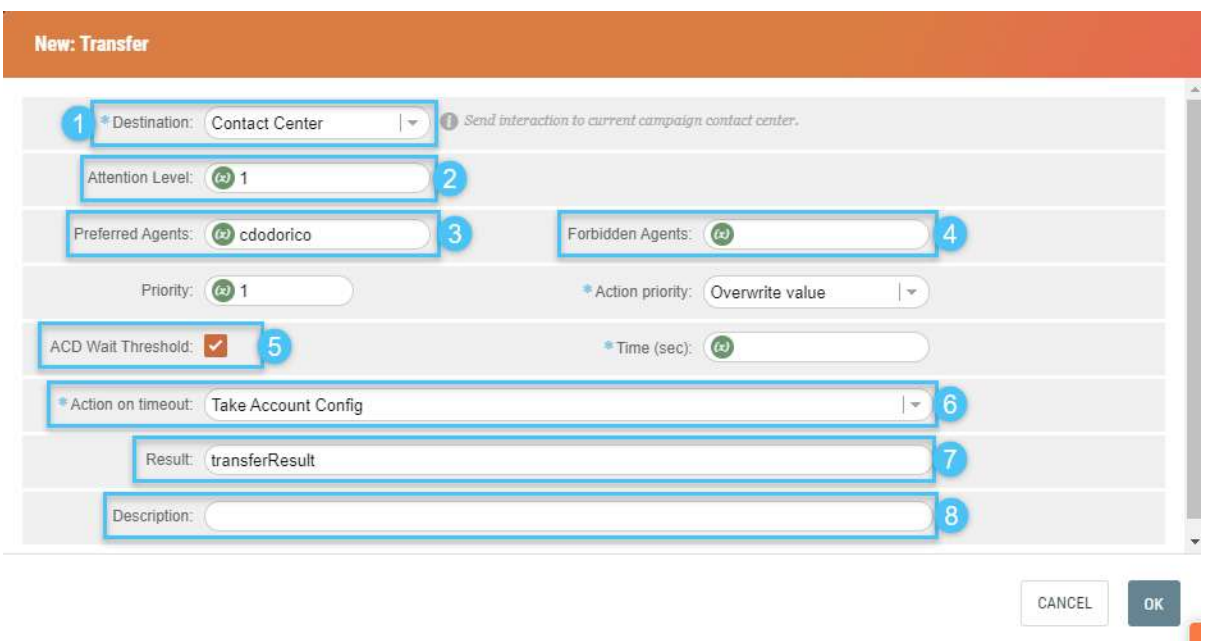


2. The following window will open. First **select the destination** (Contact Center/Agent/Campaign/Campaign and Agent)



a. Contact Center

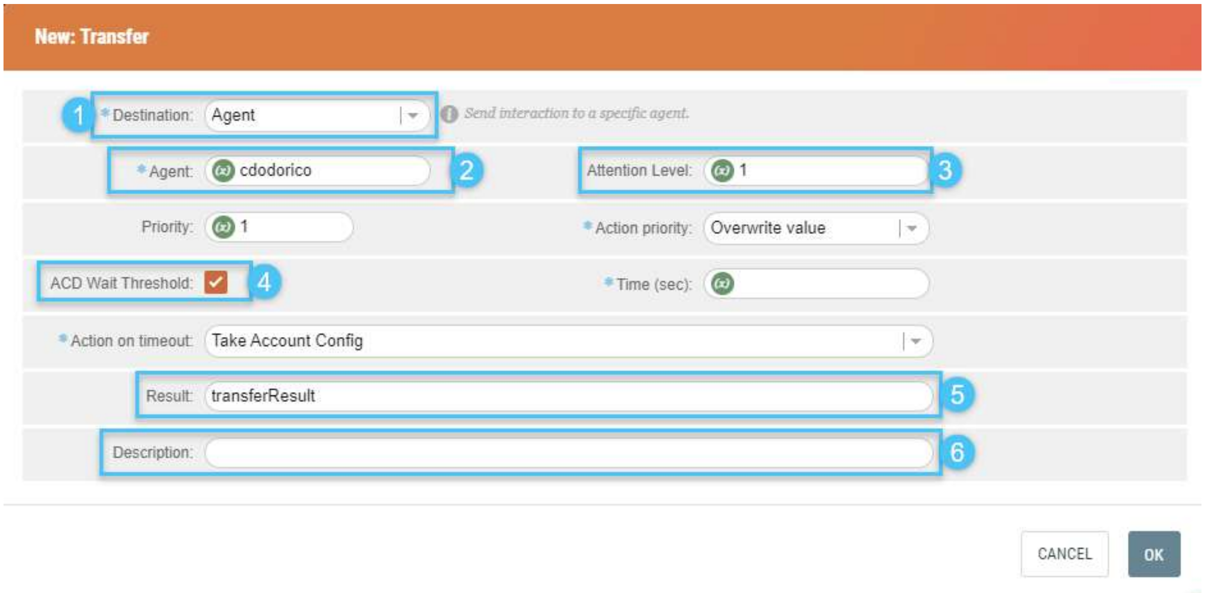
(1) Select the Contact Center destination
(2) Attention level: sets the level of attention with which the call will be transferred to the contact center.
(3) Preferred Agents: allows you to make arrangements with certain agents to prioritize them for sending them the call.
(4) Forbidden Agents: allows you to make an arrangement with agents who are to be excluded when transferring the call.
(5) ACD wait threshold: sets how many seconds to wait for an agent.
(6) Queue on timeout: if this option is enabled, it allows the call to be sent to the queue if it is not answered by the agent (timeout).
(**7)** Result: allows you to state the name of a variable for storing the result.
(8) Description: allows you to enter a description of the activity.



b. Agent

(1) Destination: Enter the **Agent** option.
(2) Agent: enter the ID of the agent to whom the call will be transferred.
(3) Attention level: sets the level of attention with which the call will be transferred to the contact center.
(4) ACD wait threshold: sets how many seconds to wait for an agent.
(5) Result: allows you to state the name of a variable for storing the result.

(6) Description: allows you to enter a description of the activity.



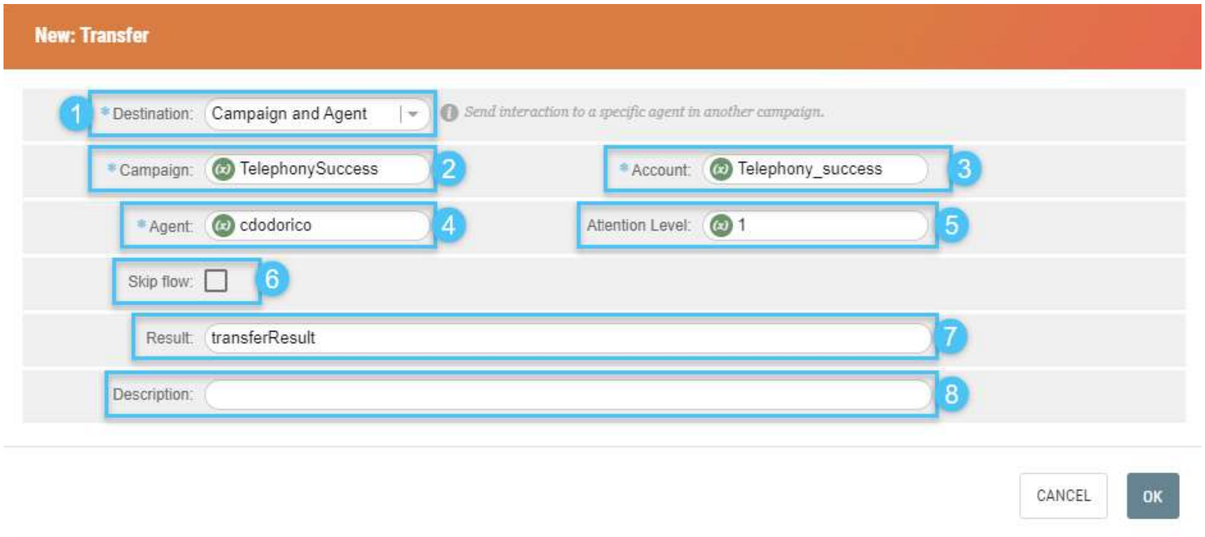
c. Campaign

(1) Destination: select the Campaign option.
(2) Campaign: enter the ID of the campaign to which the call will be transferred.
(3) Account: enter the ID of the telephony account associated with the campaign.
(4) Attention level: sets the level of attention with which the call will be transferred to the contact center.
(5) Preferred agents: allows you to make arrangements with certain agents to prioritize them for sending them the call.
(6) Forbidden agents: allows you to make an arrangement with agents who are to be excluded when transferring the call.
(7) Skip flow: if this option is enabled, it allows you to skip the flow of the target campaign and go directly to the contact center.
(8) Result: allows you to state the name of a variable for storing the result.
(9) Description: allows you to enter a description of the activity.

d. Campaign and Agent

(1) Destination: select the Campaign and Agent option.
(2) Campaign: enter the ID of the campaign to which the call will be transferred.
(3) Account: enter the ID of the telephony account associated with the campaign.
(4) Agent: enter the ID of the agent to whom the call will be transferred.
(5) Attention level: sets the level of attention with which the call will be transferred to the contact center.
(6) Skip flow: if this option is enabled, it allows you to skip the flow of the target campaign and go directly to the contact center.
(7) Result: allows you to state the name of a variable for storing the result.

(8) Description: allows you to enter a description of the activity.



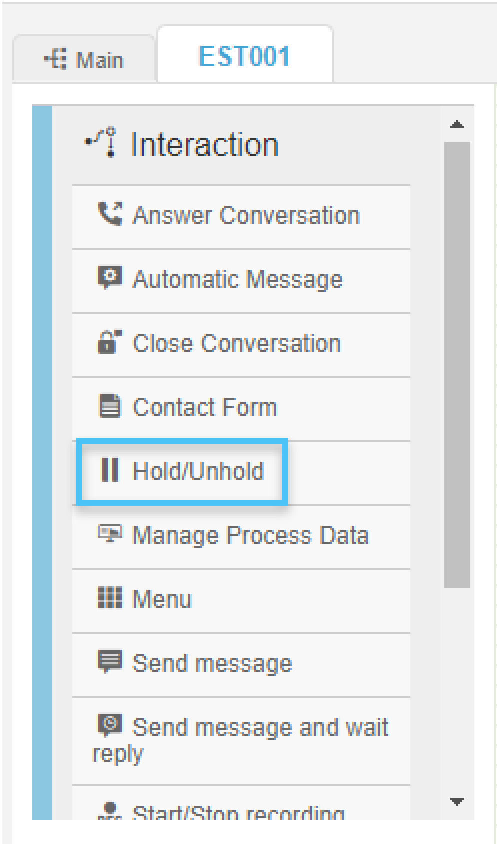
3. Once the transfer type is configured, the activity will be added to the IVR flow.

Hold/Unhold activity (IVR only)

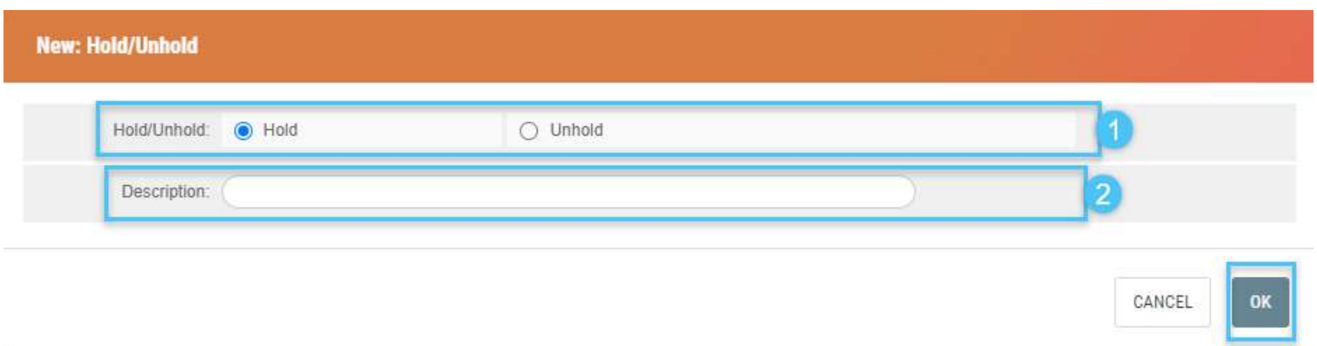
The activity allows the call to be set to Hold or Unhold within an IVR flow.

Implementation of Hold/Unhold activity

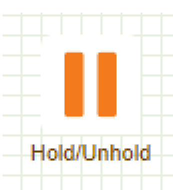
1. When entering a state, you will see activity options; select **Hold/Unhold.**



2. The following window will open. Define whether you want to **set a hold or unhold (1)**; you can **add a description (2)**, if you wish.



3. The activity will have now been added to the IVR flow.

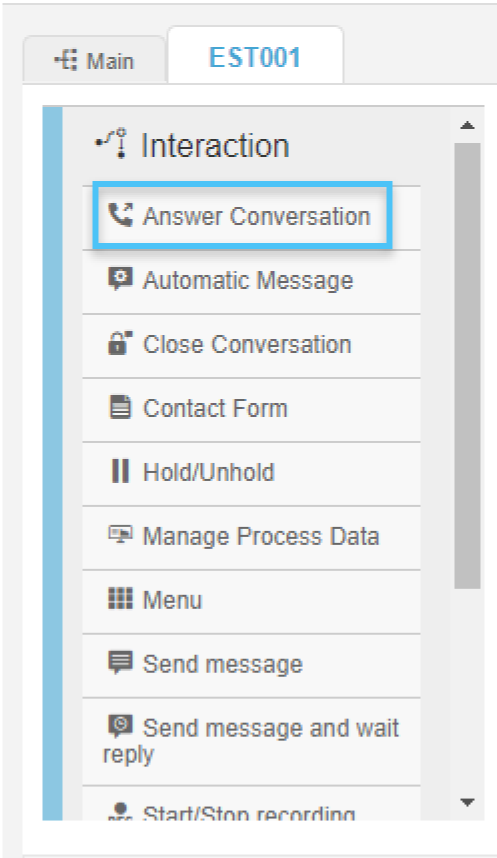


Answer Conversation activity (IVR only)

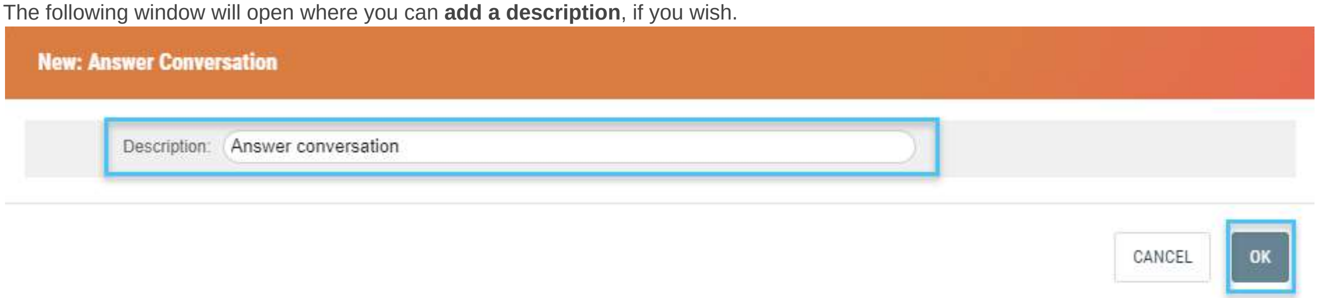
This activity allows incoming calls to be answered. It is recommended not to do anything else in the same state in which it is used, with the exception of stating the initial variables.

Implementing the Answer Conversation activity

1. On entering a state, there are various activity options; select **Answer Conversation**.



2. The following window will open where you can **add a description**, if you wish.

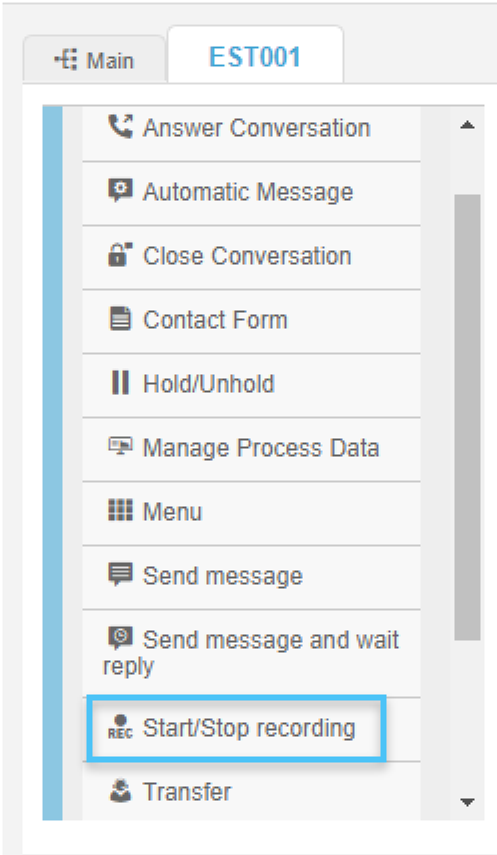


3. Once configured, the activity will be added to the IVR flow.

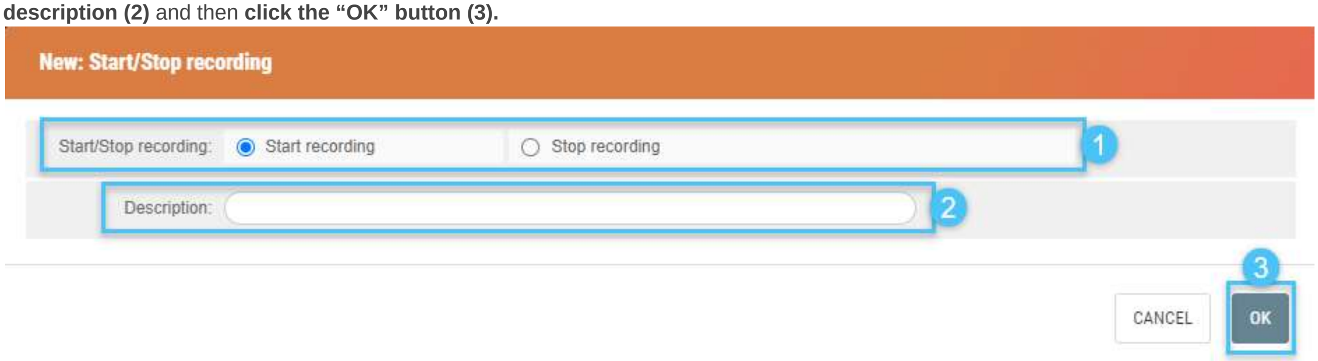
Start/Stop Recording activity (IVR only)

Implementing the Start/Stop Recording activity

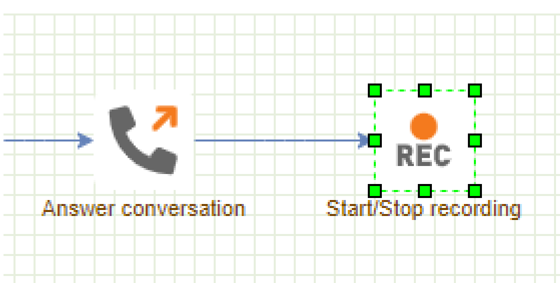
1. On entering a state, there are various activity options; select **Start/Stop Recording.**



2. The following window will appear for you to set whether **to start or stop recording the call (1)**. In addition, if you wish, you can **add a description (2)** and then **click the "OK" button (3).**



3. Once configured, the activity will be added to the IVR flow.

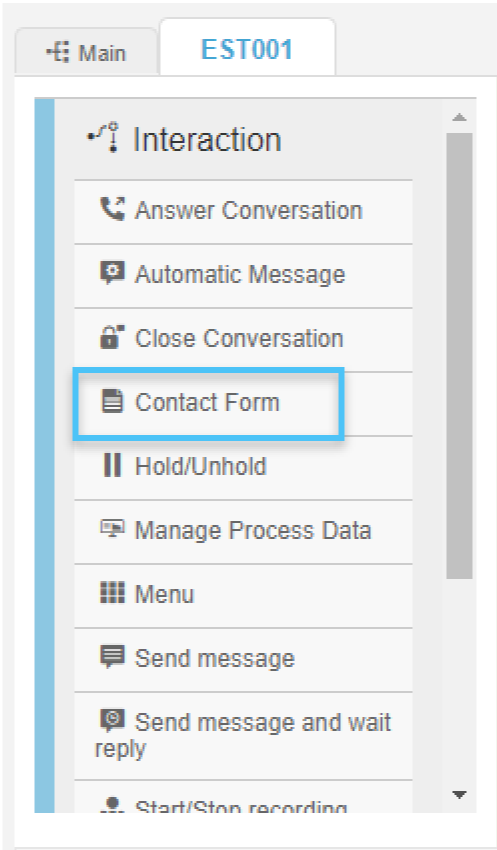


Contact Form activity

This activity allows you to initiate a contact form interaction.

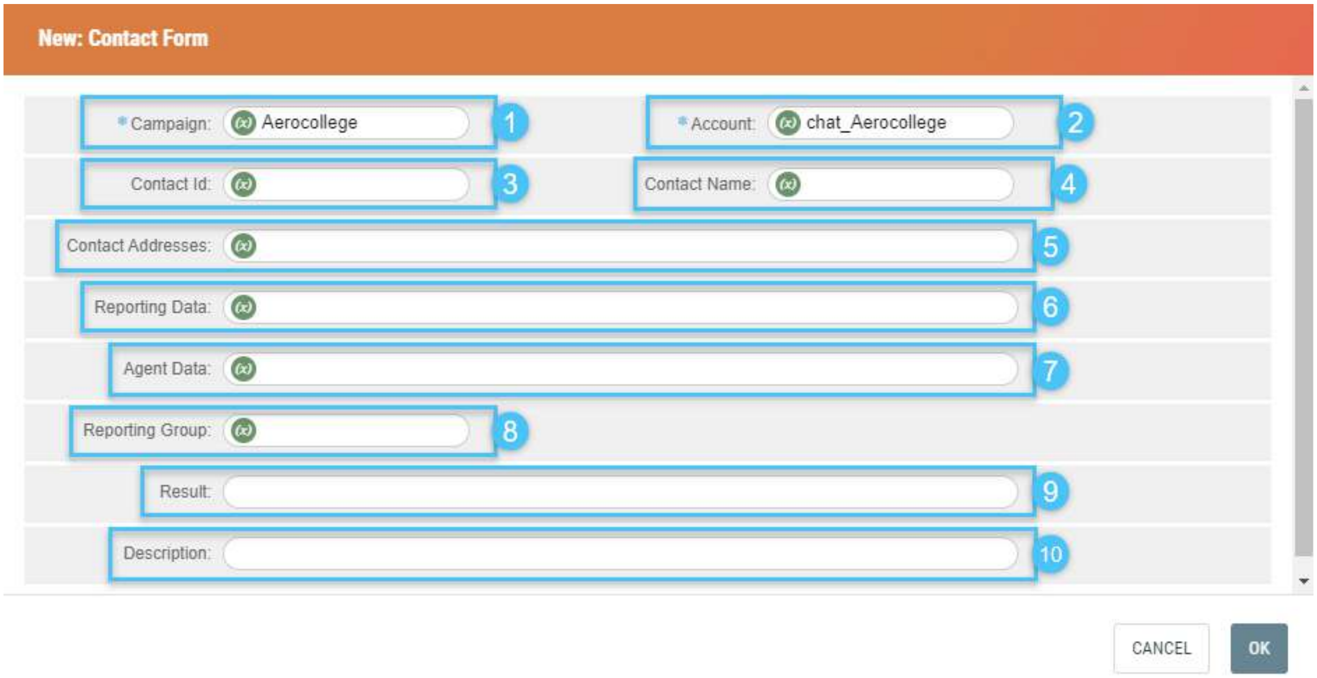
Implementing a Contact Form activity

1. On entering a state, several activity options are shown. Select **Contact Form.**

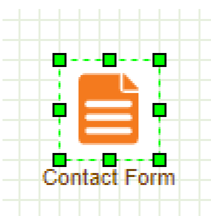


2. The following window will open; fill out the information required.

(1) Campaign: interaction campaign ID.
(2) Account: contact's external ID.
(3) Contact ID: ID or name of the account to which to send the interaction.
(4) Contact Name: name of the contact.
(5) Contact Addresses: an array of the contact's addresses (example: {{type = "MAIL"}})
(6) Reporting Data: an array of data to be used in reports (example: {{name = "my_item"}})
(7) Agent data: an array of data to be used by the agent (example: {{name = "visible_item"}})
(8) Reporting group: name of the reporting group. If you do not wish to use the information in reports, leave this field empty.
(9) Result: Allows you to set the name for the variable that holds the result.
(10) Description: Allows you to add a description of the activity.



3. The activity will be added to the flow.

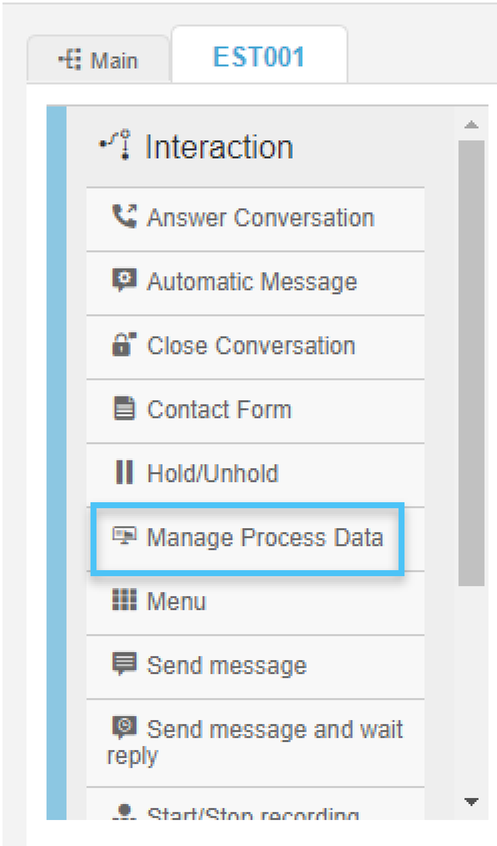


Process Data Manager activity (chatbots and IVR)

The activity allows adding to or updating information to be used for reporting.

Implementing the Process Data Manager activity

1. When entering a state, there are various activity options; select **Manage Process Data.**



2. The following window will open; fill out the information required.

   (1) Grupo de Reportes: ingresa el nombre del grupo de reportes. En caso de que no se desee usar la información en reportes el campo debe ir vacío.
   (2)
   View more...

   Application: allows you to select from the available applications.

   Name: allows you to enter the name.

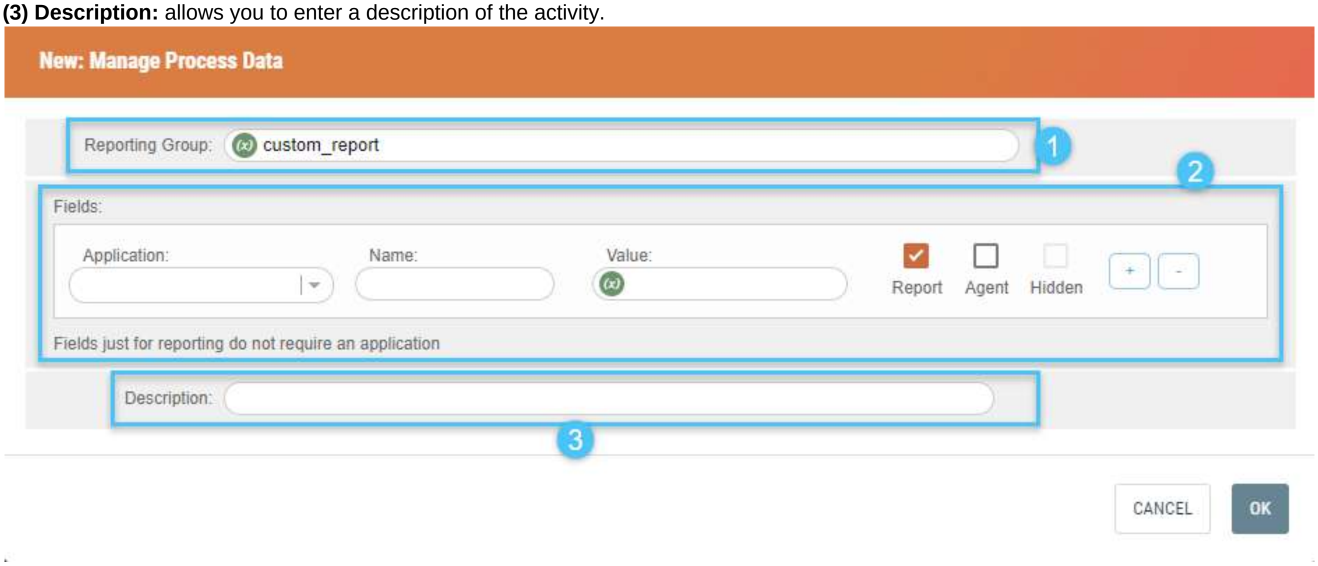
   Value: allows you to enter a variable or an utterance.

   Report:

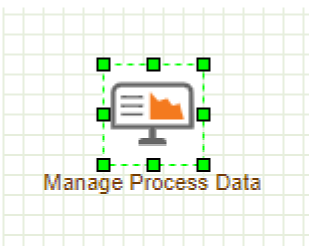
   Agent:

   Hidden:

(3) Description: allows you to enter a description of the activity.



3. The activity will be added to the flow.



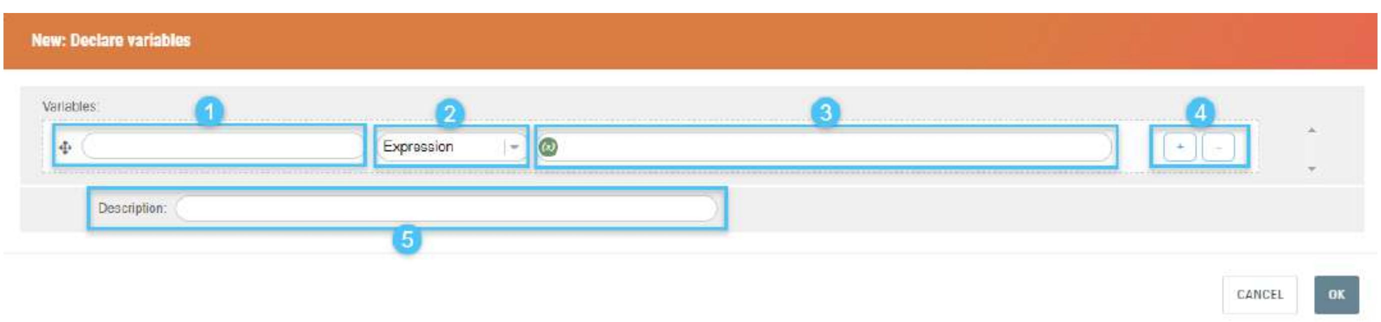
Code-type activities

- Declare Variables activity
- Logger activity
- Code Block activity

Declare Variables activity

Component for declaring global variables; it means that variables can be reused throughout the flow.

It allows you to define the name of the variable **(1)**, it indicates the type (utterance/object/array) **(2)**, it establishes the initial value of the variable **(3)**, it allows you to add more or remove variables **(4)**. Optionally you can **add a description (5).**



Usage example (object-type variable)

The following example shows the use of variables to set the country-specific prefix for an interaction/call:

(1) We state the variable name, in this case code.

(2) We indicate the variable type as an object since it is similar to a string.

(3) We list the variable's keys

(4) We set the values for the various keys

(5) We save the variable by clicking the "OK" button.

Usage example (array-type variable)

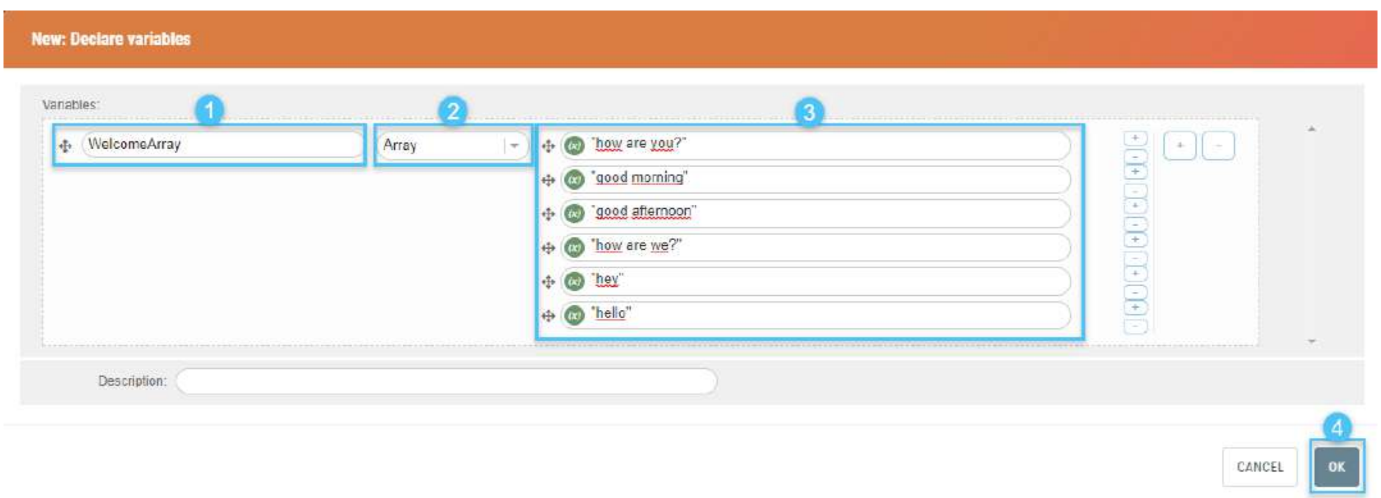
The following example shows the use of array variables to store typical phrases from a chat interaction.

(1) We state the variable name, in this case "welcome array" since the utterances will be those corresponding to the beginning of the interaction.

(2) We state the variable type as an array.

(3) We set the possible values that the variable can take.

(4) We save the variable by clicking the "OK" button.

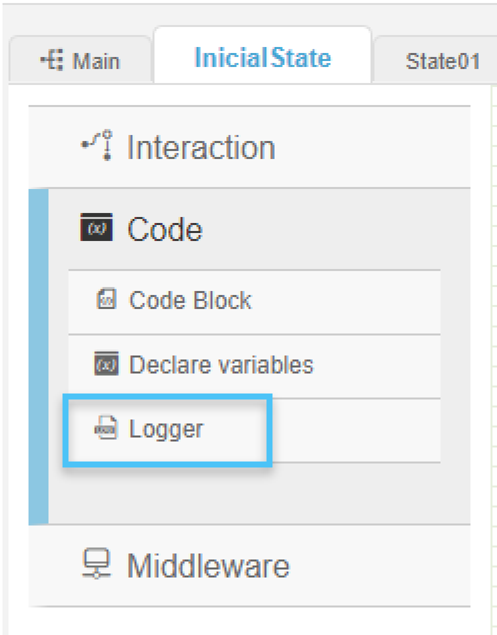


Logger activity

This type of activity is used to log an utterance or variable.

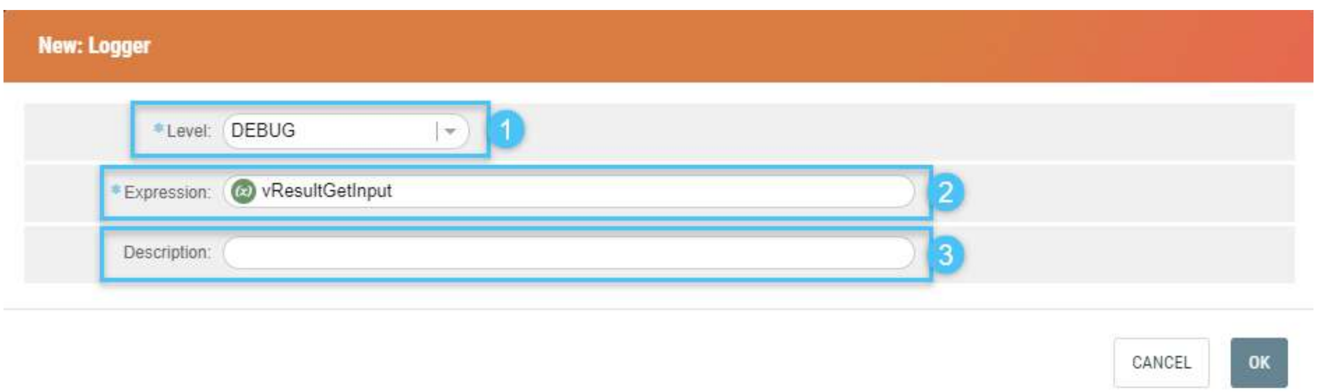
Implementing the Logger activity

1. On entering a state, there are various activity options; select **Close Interaction.**

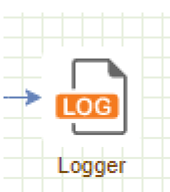


2. Complete the following information:

(1) Level: set the level at which the variable is to be logged.
(2) Utterance: define the utterance to be logged; it can be a string, number or object.
(3) Description: you can add a description, if you wish.

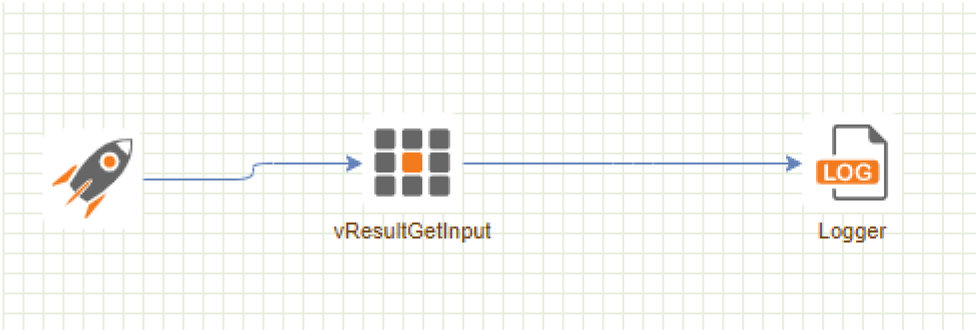


3. Once configured, the activity will appear in our flow.

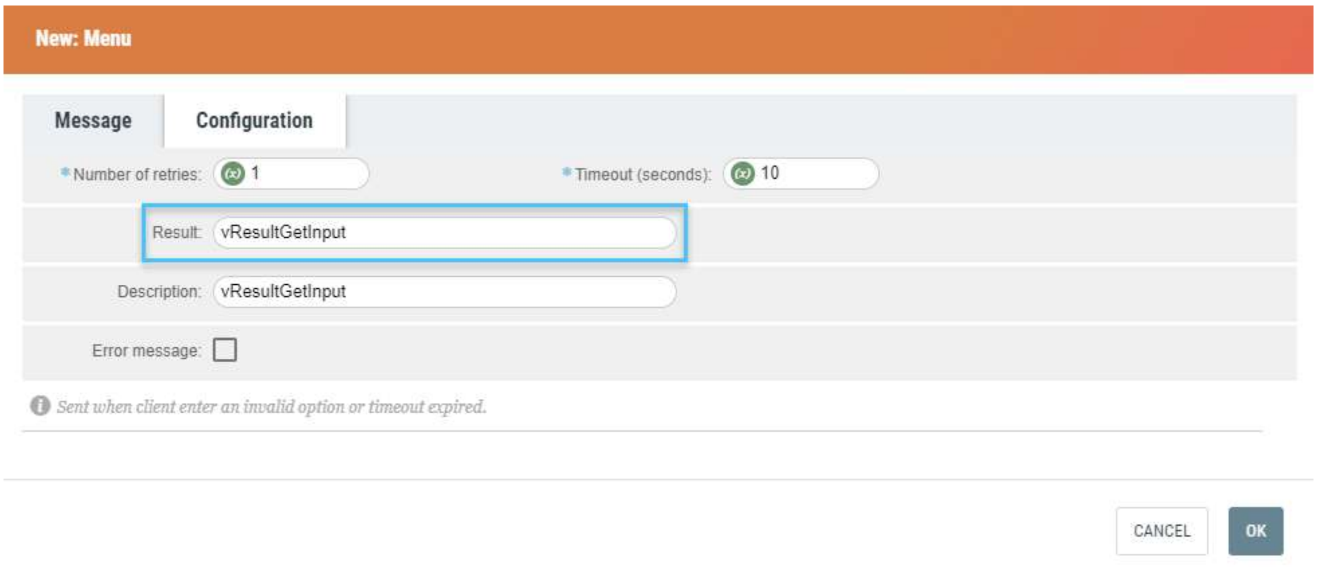


Usage example: Logger in an IVR system

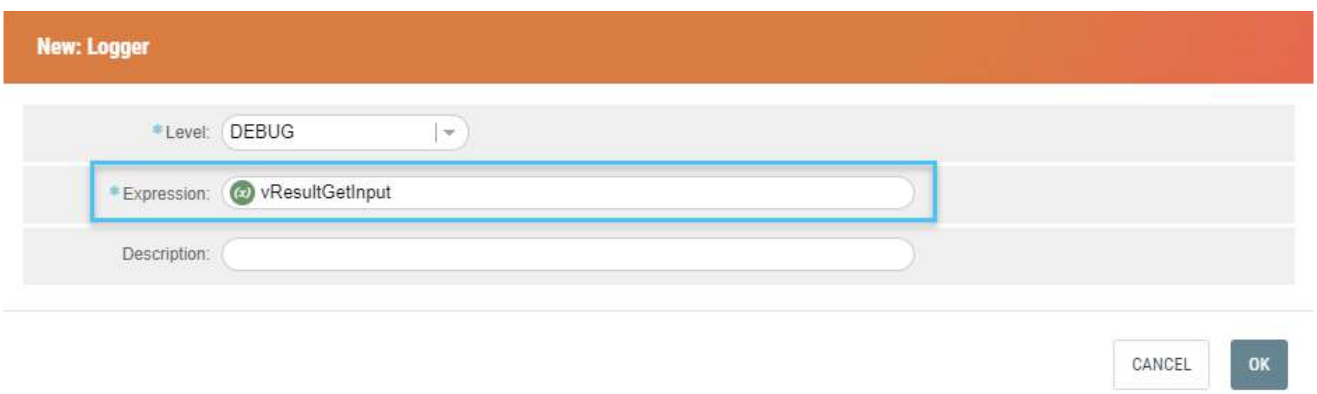
The following example illustrates the use of a logger to log a variable previously obtained via automatic audio in an IVR flow:



1. First the message is sent, its result defined by the name "vResultadoGetInput".



2. The log is defined at the debug level with the previously defined variable.



Code Block activity

This is an editable space that allows you to create programming algorithms using the Lua language, in order to help in advanced situations. You can connect to web services, DBs, and generate reusable algorithms, among other things.

Lua is a fast, powerful programming language that is easy to learn, designed as an embeddable scripting language.

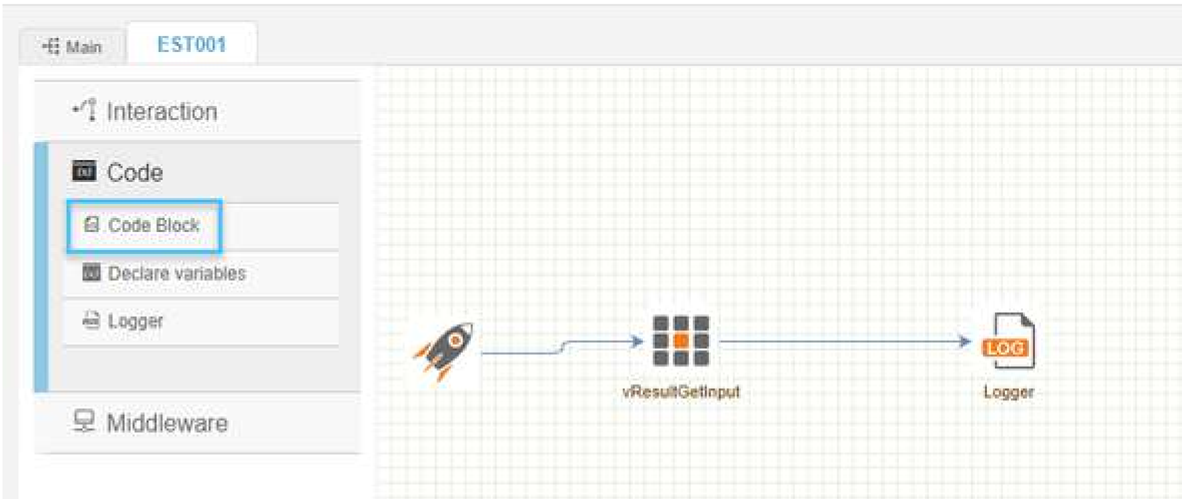
It is the programming language that is compatible with the process flows of this platform. This programming language is used by Classes or with the **"Code Block"** activity.

Lua code using classes

See How to use classes within the flow.

Lua code using the Code Block activity

1. On entering a state, there are various activity options; select **UI Code Block** to start generating **Lua code**.



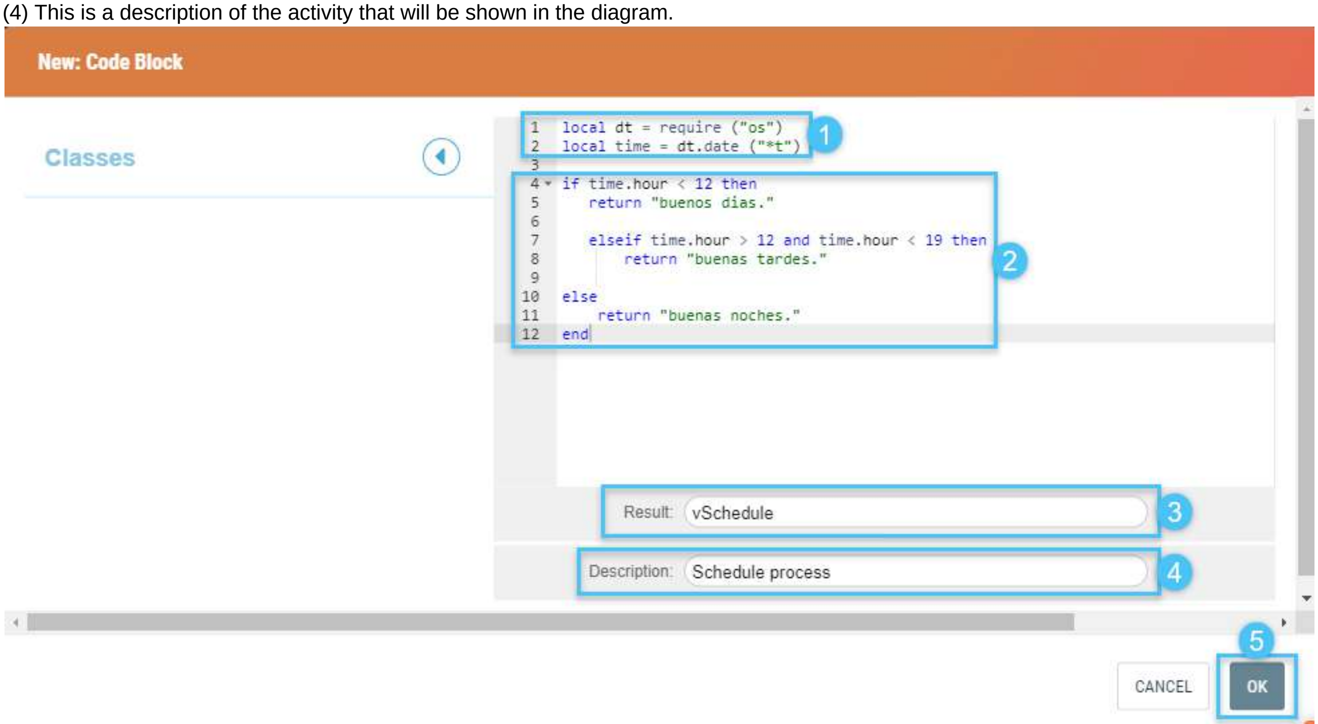
2. The Lua code editor will open. In this example:

   (1) We state variables that obtain properties from the date and time functions.

   (2) Once the date and time have been captured, we condition them using the **"if", "elseif"** and **"else"** statements according to the time to display a message.

   (3) This is the name of the variable where the final message (result) will be saved.

   (4) This is a description of the activity that will be shown in the diagram.



Middleware-type activities

- Execute LUIS API activity (chatbots and IVR)
- QnA Maker activity (chatbots and IVR)

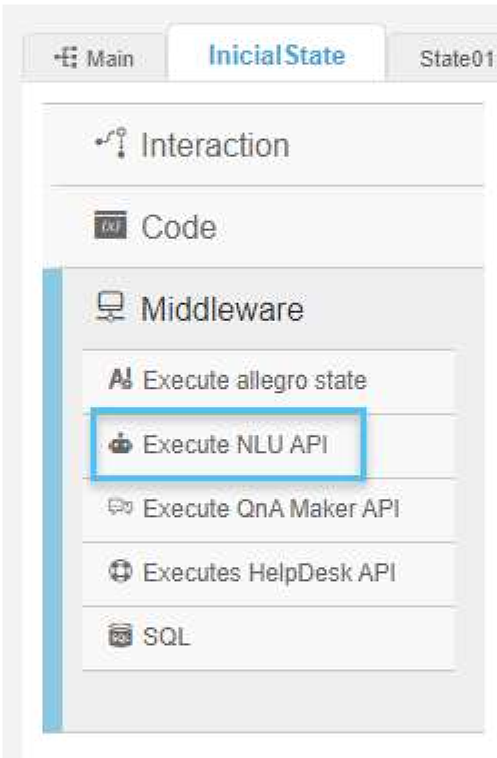
- SQL activity (chatbots and IVR)
- Execute Allegro State activity (chatbots and IVR)

Execute LUIS API activity (chatbots and IVR)

This activity allows you to run the LUIS API to perform NLU queries in applications previously created and trained in LUIS.

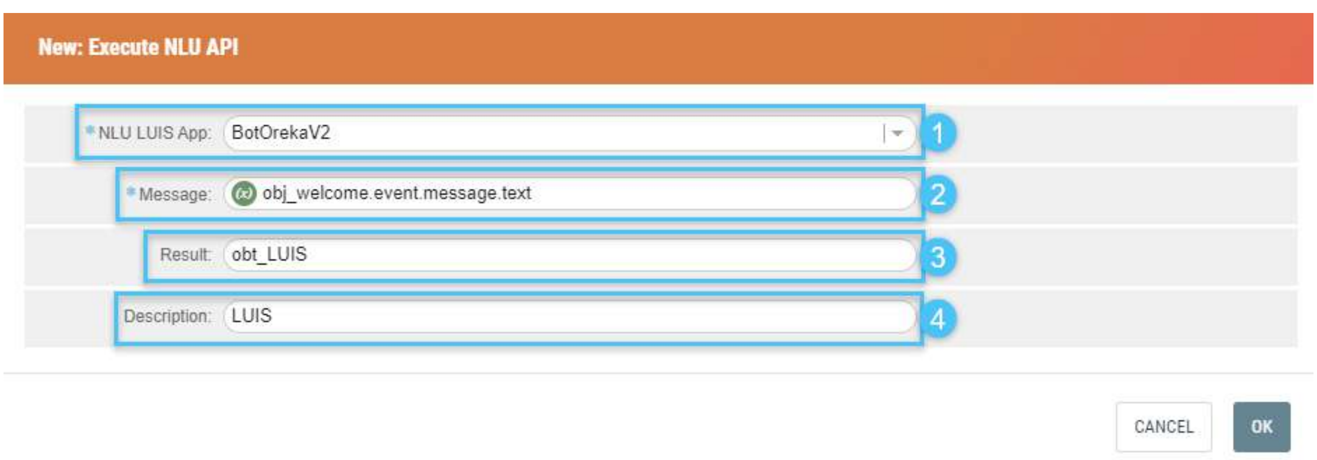
Implementing the LUIS API activity

1. On entering a state, there are various activity options; select **"Execute LUIS API".**

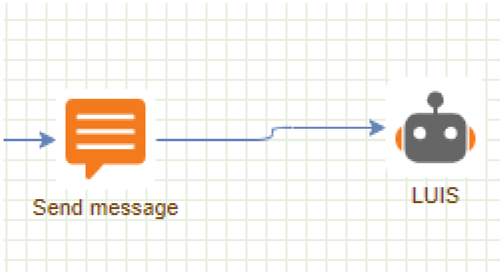


2. The following window will appear for you to complete the necessary data.

(1) Cognitive Services App: select the previously created Cognitive Services app.
(2) Message: enter the name of the variable containing the message to be sent to the LUIS API. It must be previously stored with a message activity.
(3) Result: you can save the result of the LUIS API in a variable by entering its name.
(4) Description: you can enter a description for the activity.



3. Once configured, the activity will appear in our flow.

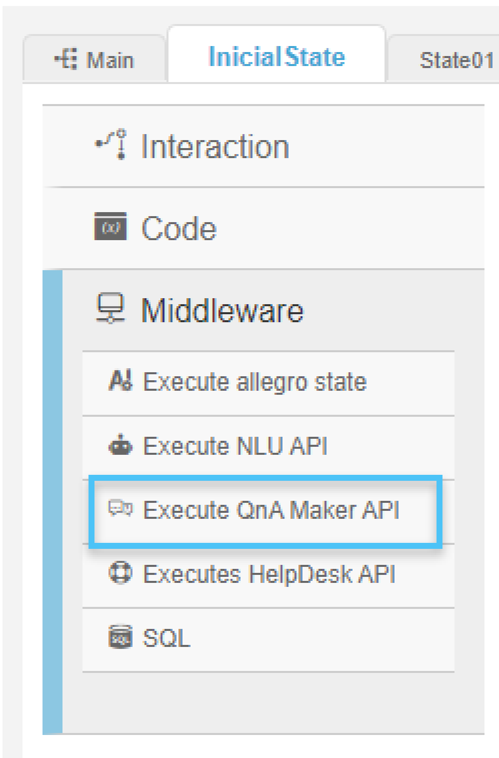


QnA Maker activity (chatbots and IVR)

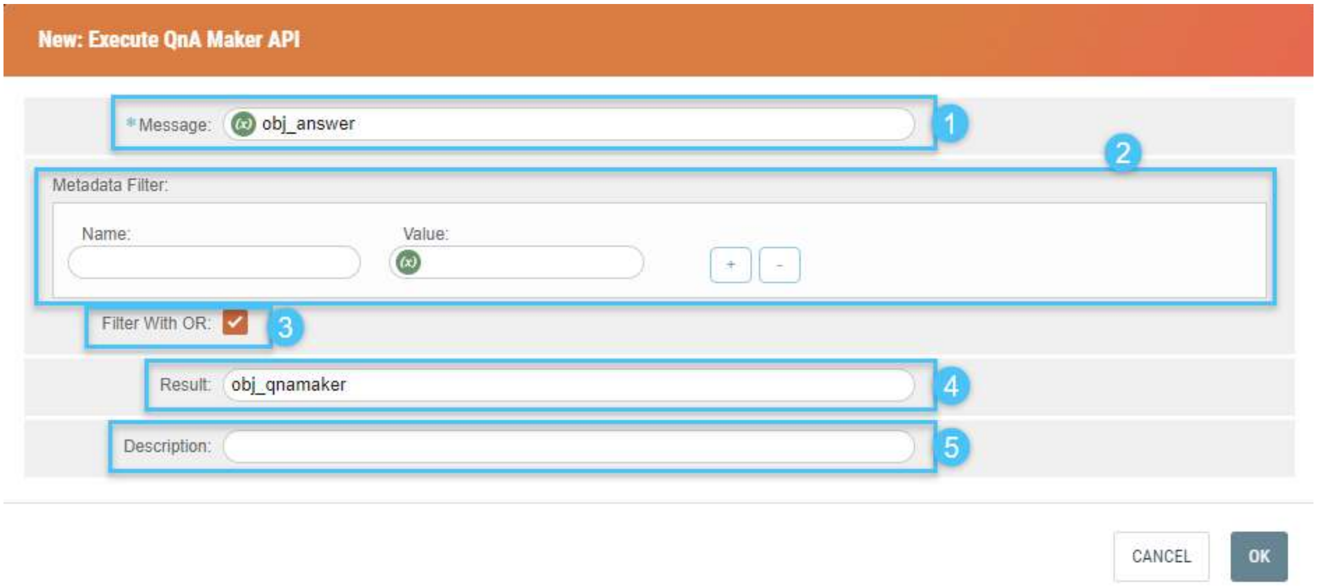
This activity allows queries to be run on the QnA Maker knowledge base.

Implementing the QnA Maker activity

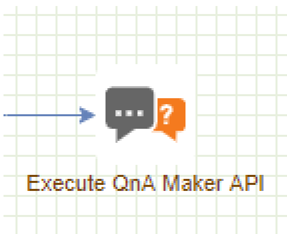
1. When entering a state, there are various activity options; select **"Execute QnA Maker API".**



2. The following window will open for you to fill out the data.
   (1) Messages: represents the variable that contains the message to be sent to the QnA Maker API.
   (2) Metadata Filter: allows you to filter by the metadata previously configured in QnA Maker.
   (3) UI Filter with OR: if this option is checked, it allows the strict operation of the filter with OR, in case no function with AND is found.
   (4) Result: enables saving the QnA Maker API response in an object-type variable.
   (5) Description: allows you to enter a description of the activity.



3. Once configured, the activity will appear in our flow.

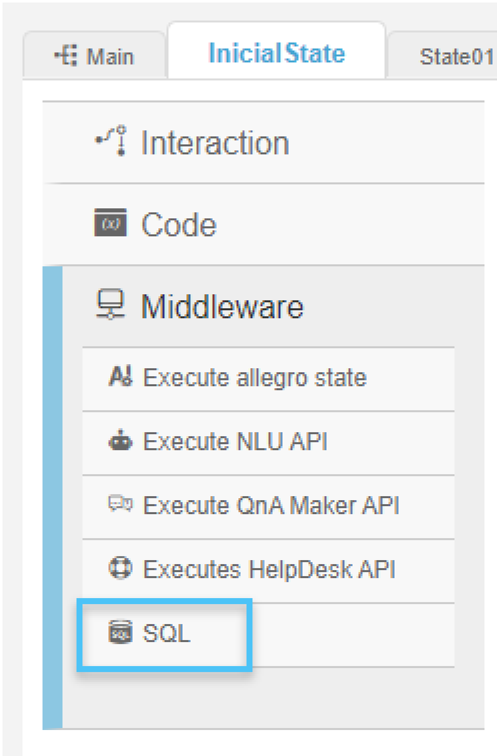


SQL activity (chatbots and IVR)

This activity enables querying of the SQL database.

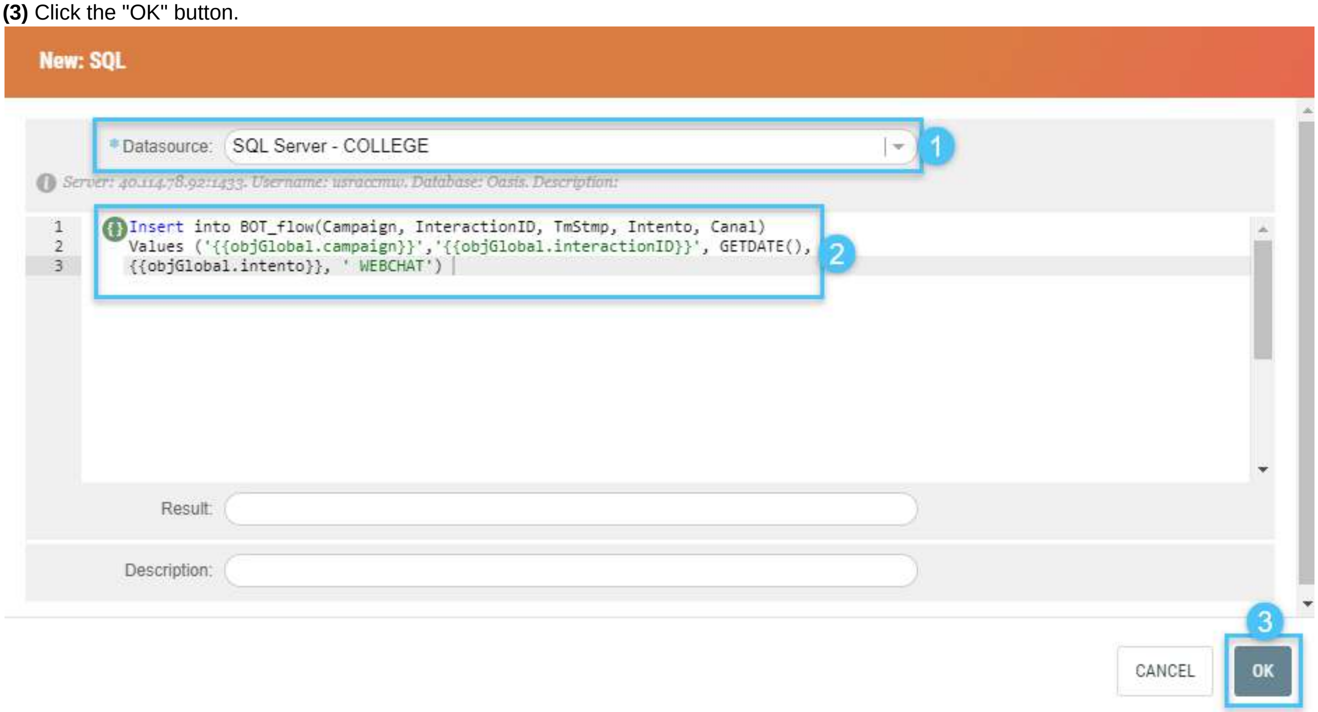
Implementing the SQL activity

1. On entering a state, there are various activity options; select **"Execute LUIS API".**

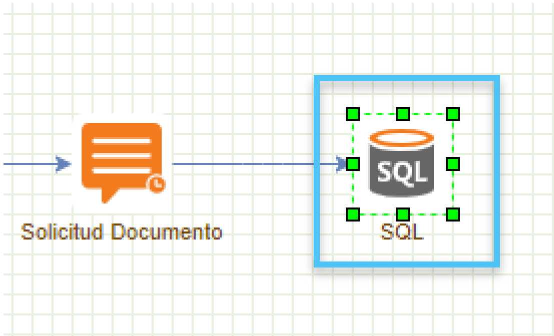


2. The following window will open for you to fill out the data.

(1) Data Source: you must select the base where the query will be made (it must be previously configured).
(2) Enter the query to perform on the SQL base. This example performs an insert of the value of a variable saved in an activity prior to the SQL activity.
(3) Click the "OK" button.



3. The activity will be added to the flow.

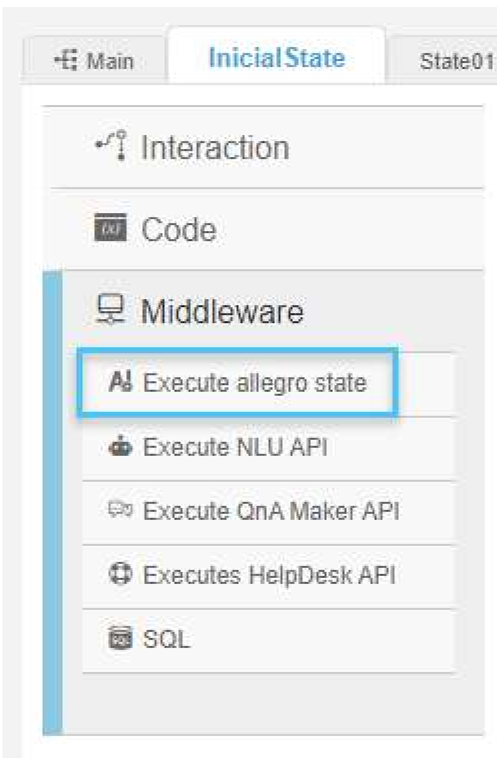


Execute Allegro State activity (chatbots and IVR)

The activity allows you to run a state in an Allegro process.

Implementing the Execute Allegro State activity.

1. On entering a state, there are various activity options; select **Execute Allegro State.**



2. The following window will open for you to fill out the data.

(1) IP: enter the Allegro web handler IP or domain.
(2) Port: enter the Allegro web handler port.
(3) SSL: check this box if the web handler uses SSL.
(4) VCC: enter the name of the VCC within Allegro.
(5) State: enter the name of the Allegro state.
(6) Data: enter the name of the variable that contains the data to send to the state (it must be an object).
(7) Result: allows you to save the result in a variable.
(8) Description: allows you to enter a description of the activity.

3. The activity will be added to the flow.

Class

- What is a class?
- How to create or edit classes using the class IDE
- How to use classes within the flow

What is a class?

A **class** is a grouping of data (variables or fields) and functions (methods) **that** operate on those data. These data and functions belonging to a **cl ass** are called variables and methods or functions.

In Process Flow we can define classes with variables and functions using the Lua programming language that can later be used in Code-type activities.

Classes are defined using attributes and methods:

Attributes: Attributes are a property or characteristic that can be assigned to an object (element). By using attributes, specific values can be assigned to particular elements.

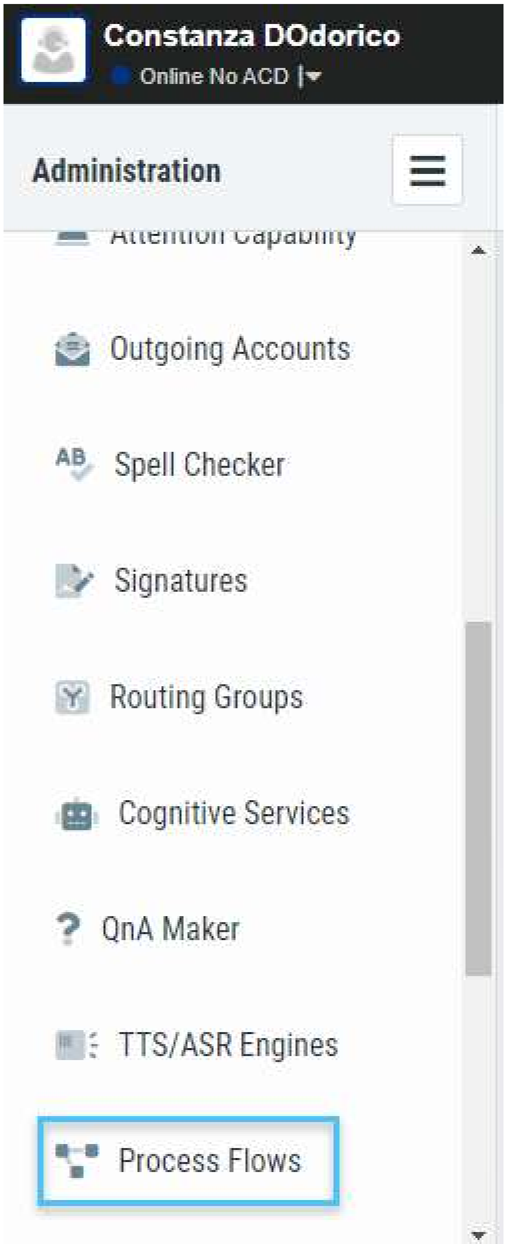
Methods: Methods are blocks of Lua code that contain a series of instructions.

To learn how to create a class, see How to create a new class.

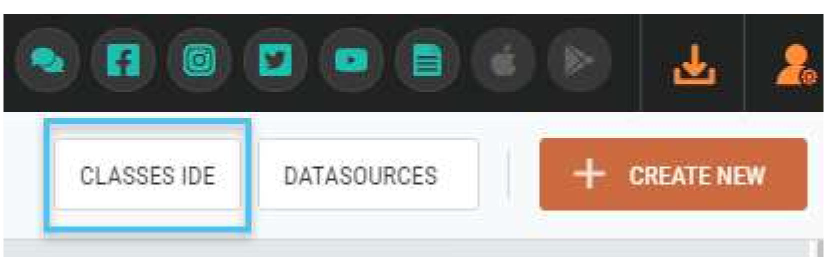
How to create or edit classes using the class IDE

The following guide describes the process to be able to add a class in a process flow.

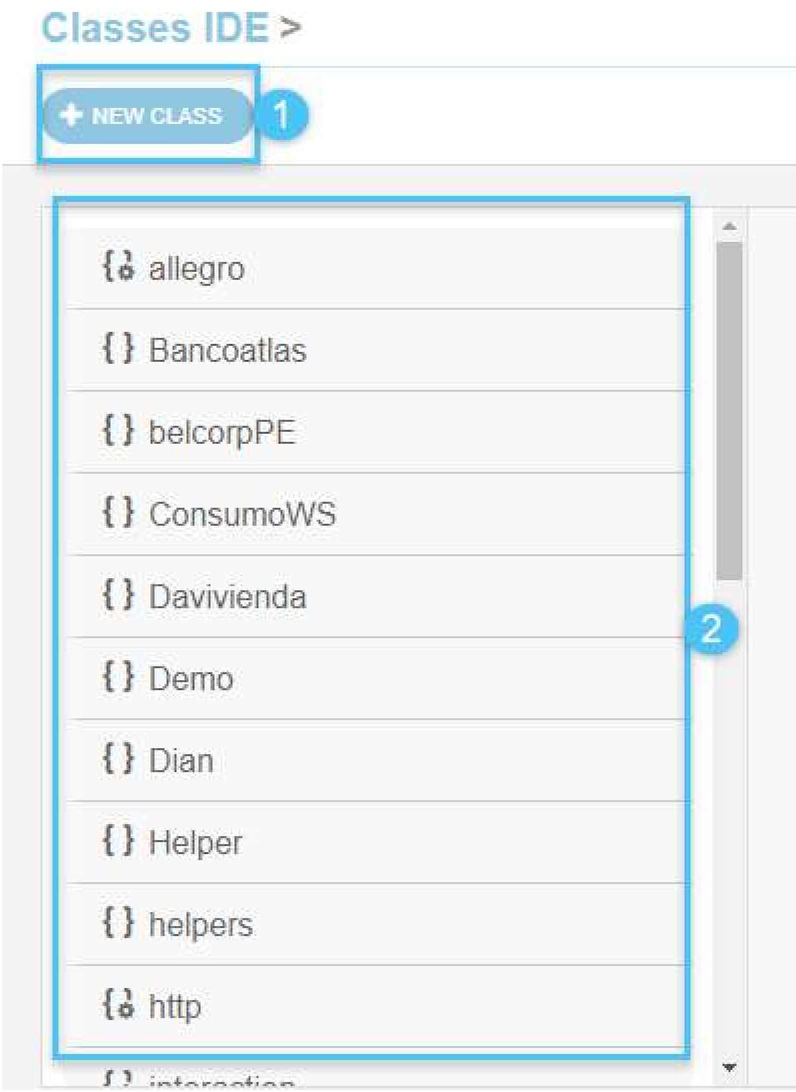
1. Within Configuration, go to the **"Process Flows"** section.



2. Inside Process Flow, **click the "CLASSES IDE"** button.



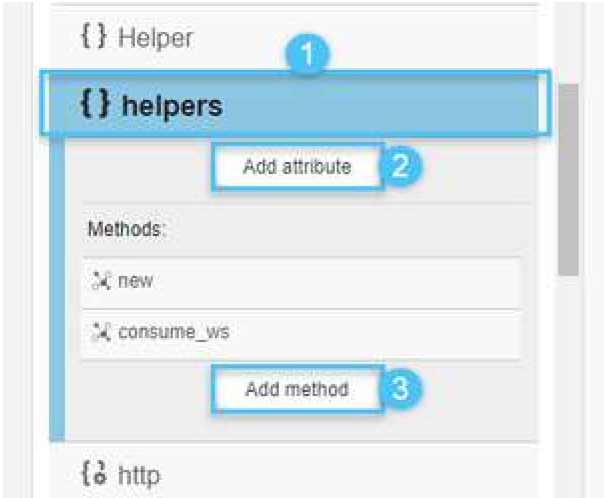
3. There you will have the possibility of creating new classes **(1)** or editing existing ones **(2).**



a. Edit a class

Classes with the icon  cannot be modified

i. **Click on the class you want to edit (1**); the option **to add new attributes (2)** or **new methods (3)** will be displayed.

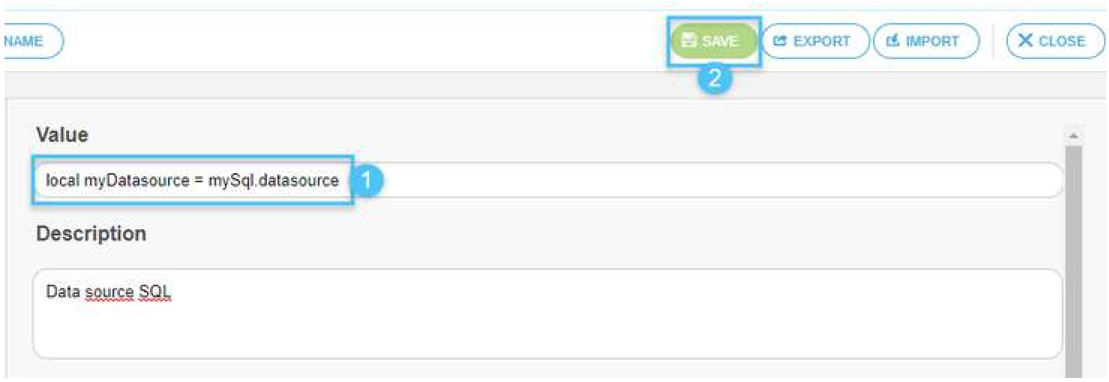


Attributes: Attributes are a property or characteristic that can be assigned to an object (element). By using attributes, specific values can be assigned to particular elements.

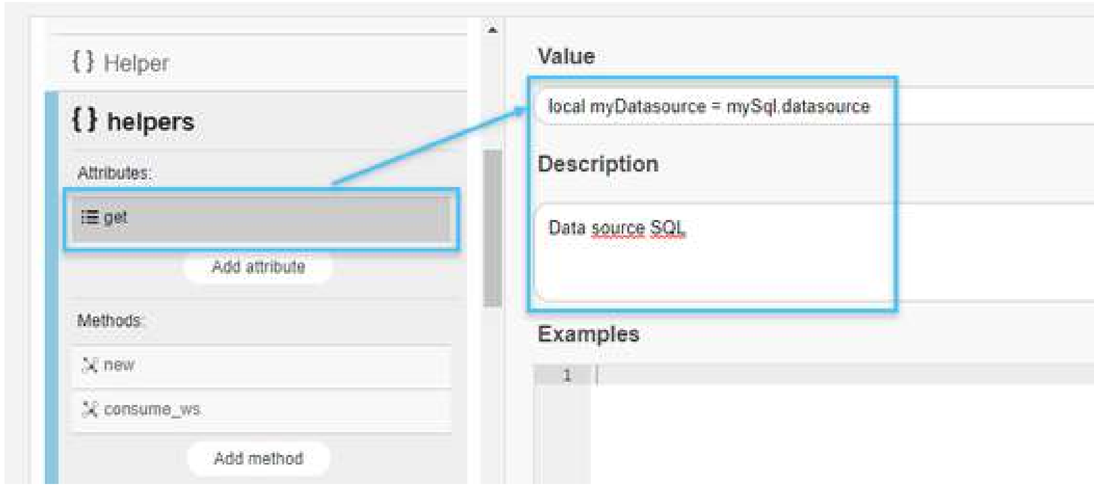
Methods: Methods are blocks of Lua code that contain a series of instructions.

1. Add attribute
   a. On clicking Add attribute, the following window will be displayed; enter a name for the attribute.

   b. The IDE will be displayed; **enter the value of the attribute (1)** . **You can enter a description**, if you wish. Then **click the "Save" button (2).**

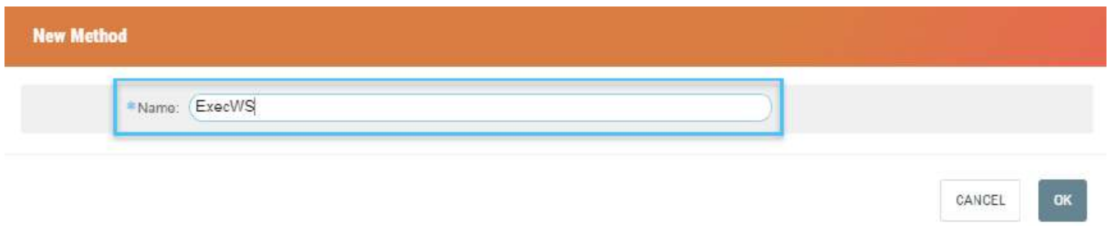


c. The attribute will be saved and will be available to use in flows.

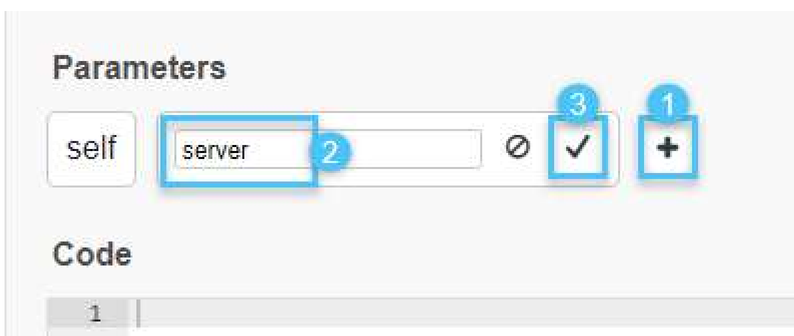


2. Add method

a. On clicking Add method, the following window will be displayed; enter a name for the method.

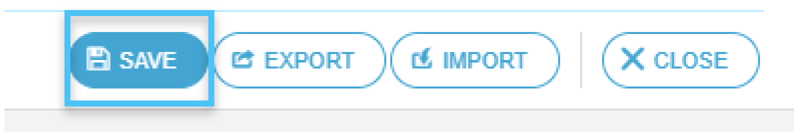


b. You can add new parameters; to do so, click on the  **button (1),** then enter the name of the parameter **(2),** and lastly, click the  **button (3).**



c. After adding the necessary parameters, you can **add the Lua code and a description.**

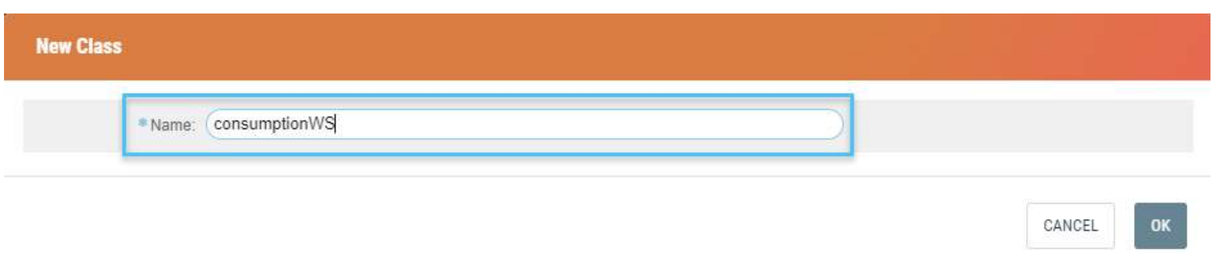
d. Lastly, click "SAVE" to save the method in the class you've created.



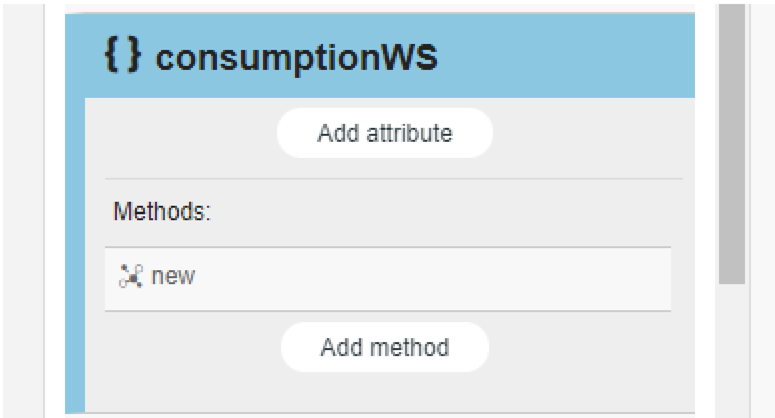
b. Create a new class

i. On entering the classes IDE, click on the "NEW CLASS" button.

ii. The following window will be displayed; **enter a name for the class.**



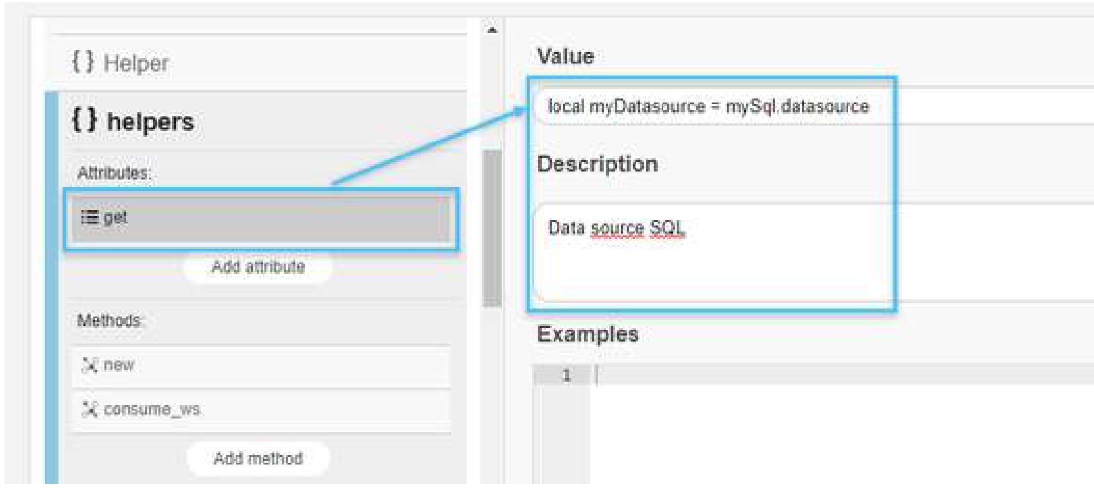
iii. The class will be added and you can add new attributes and methods.



1. Add attribute
   a. On clicking Add attribute, the following window will be displayed; enter a name for the attribute.

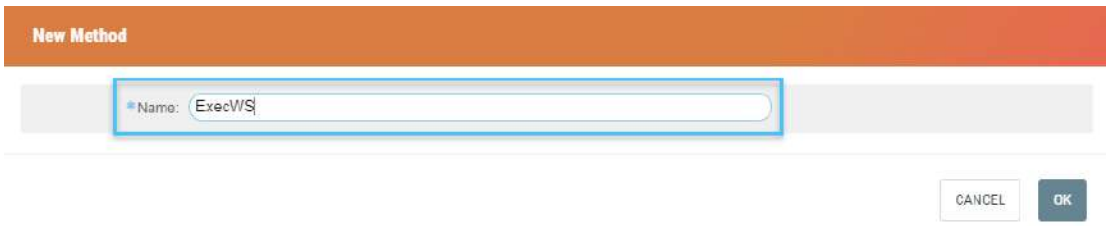
   b. The IDE will be displayed; **enter the value of the attribute (1)**. **You can enter a description**, if you wish. Then **click the "Save" button (2).**

c. The attribute will be saved and will be available to use in flows.

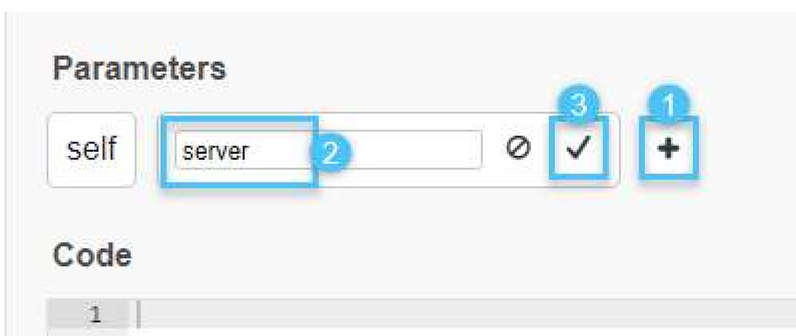


2. Add method

a. On clicking Add method, the following window will be displayed; enter a name for the method.

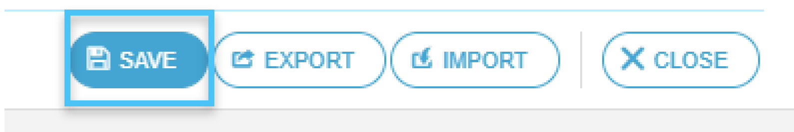


b. You can add new parameters; to do so, click on the  **button (1),** then enter the name of the **parameter (2),** and lastly, click the  **button (3).**



c. After adding the necessary parameters, you can **add the Lua code and a description.**

d. Lastly, click "SAVE" to save the method in the class you've created.

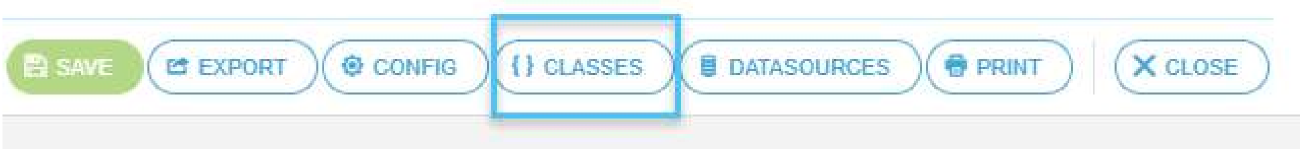


4. Once you have added/edited the classes you need, **click the "SAVE"** button to confirm the changes made.

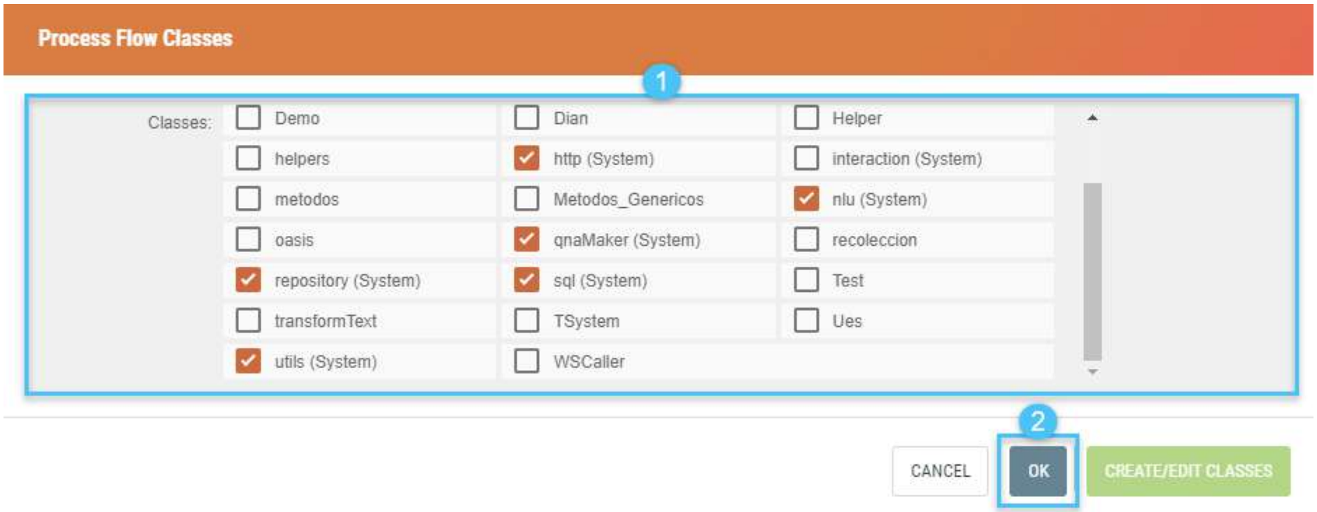
How to use classes within the flow

Classes can be used in the flows contained in a Code-type activity. Follow the steps below to learn how to do this.

1. You must first enable the classes you want to use. To do so, go to the flow in which you will use the classes and **click on the "{ } CLASSES" button.**

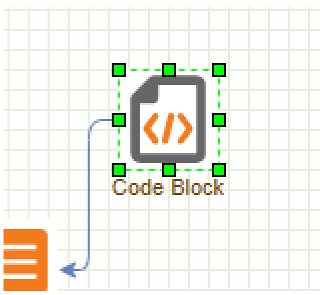


2. The following window will open; **select the classes you want to use within the flow (1)**, and then **click the "OK" button (2).**

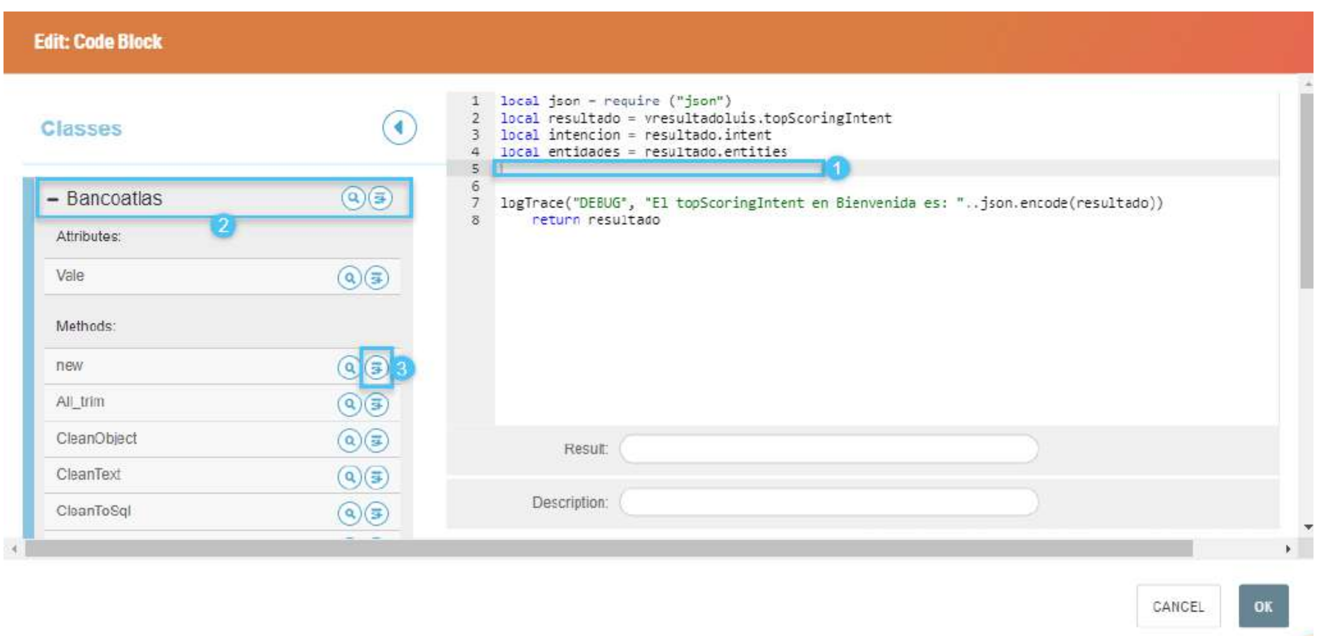


.

3. Go to the code-type activity in which you will be using classes.



4. Within the code editor, place the cursor on the line where you want to add the class (1), then search for the class you want to add in the list of classes (2) and click the  button (3)



5. The class has now been added.

```
local json = require ("json")
local resultado = vresultadoluis.topScoringIntent
local intencion = resultado.intent
local entidades = resultado.entities
local myObject = classHelpers.Bancoatlas.new()

logTrace("DEBUG", "El topScoringIntent en Bienvenida es: "..json.encode(resultado))
    return resultado
```

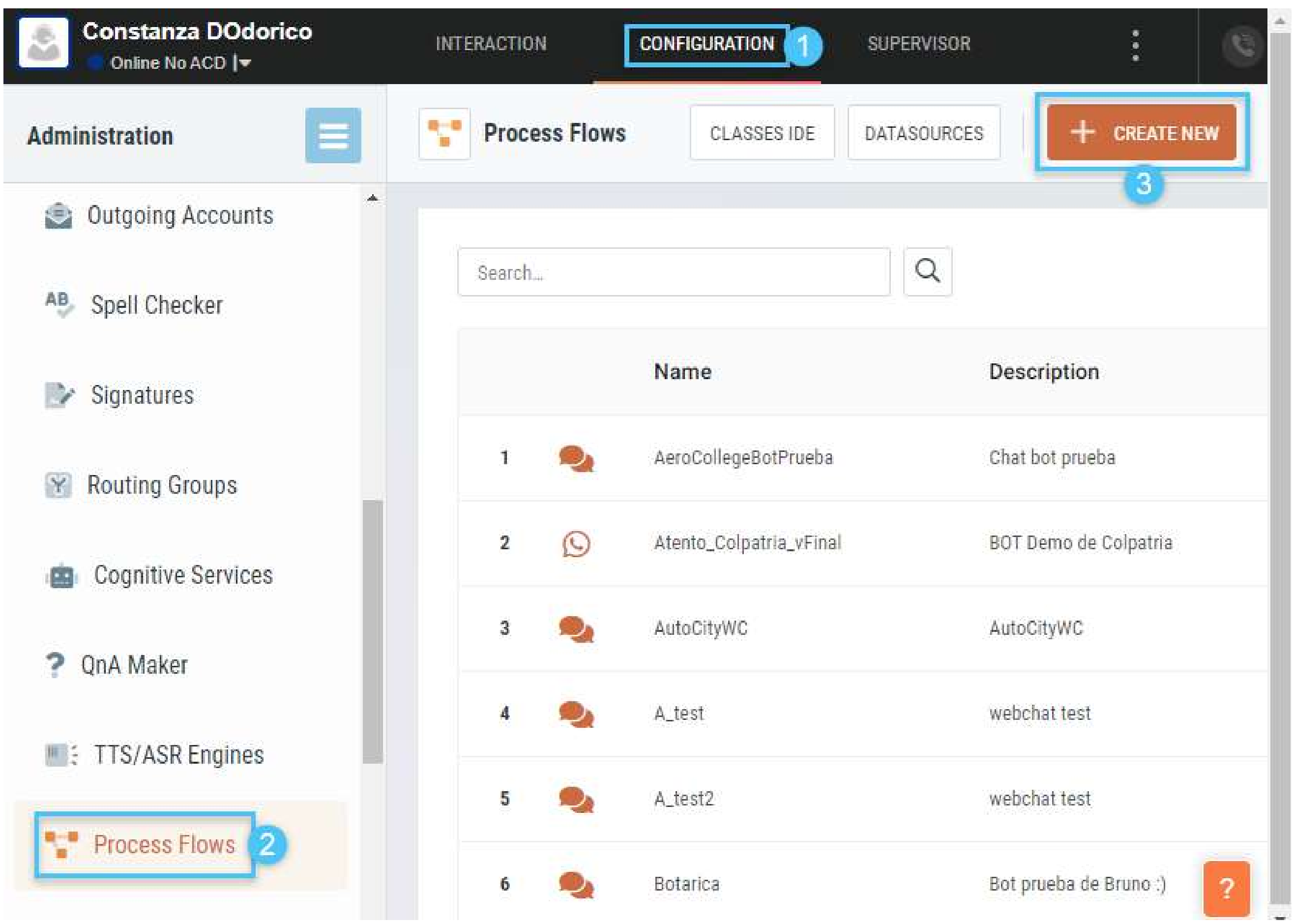
Flows

- How to create a new flow
- How to import a flow
- How to edit a flow
- How to clone a flow
- How to delete a flow
- How to print a flow
- How to modify the name and description of a flow

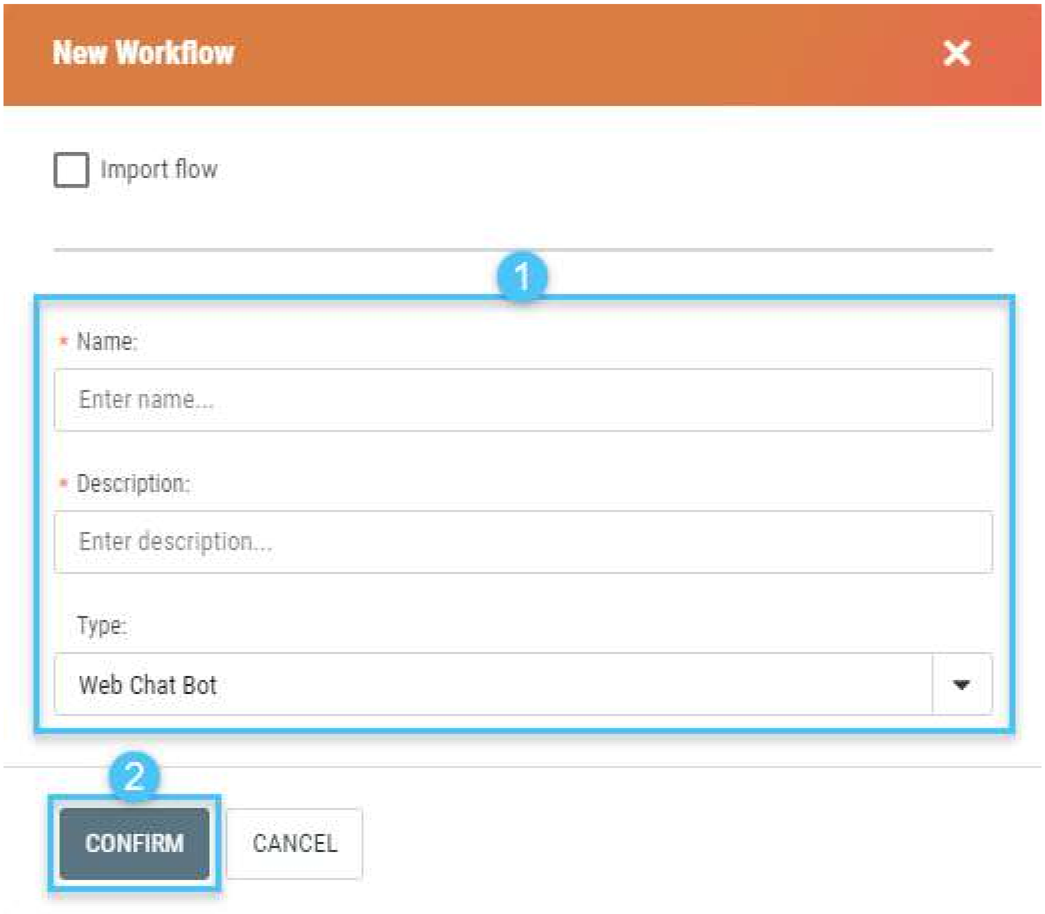
How to create a new flow

To create a process flow:

1. Go to the **CONFIGURATION section (1)**, then to the **Process Flows section (2)** and **click on the "NEW FLOW" button (3).**



2. The following window will be displayed. **Fill out the necessary information (1)** and then **click the "Open" button. (2).**



Name: enter a name to identify the flow.

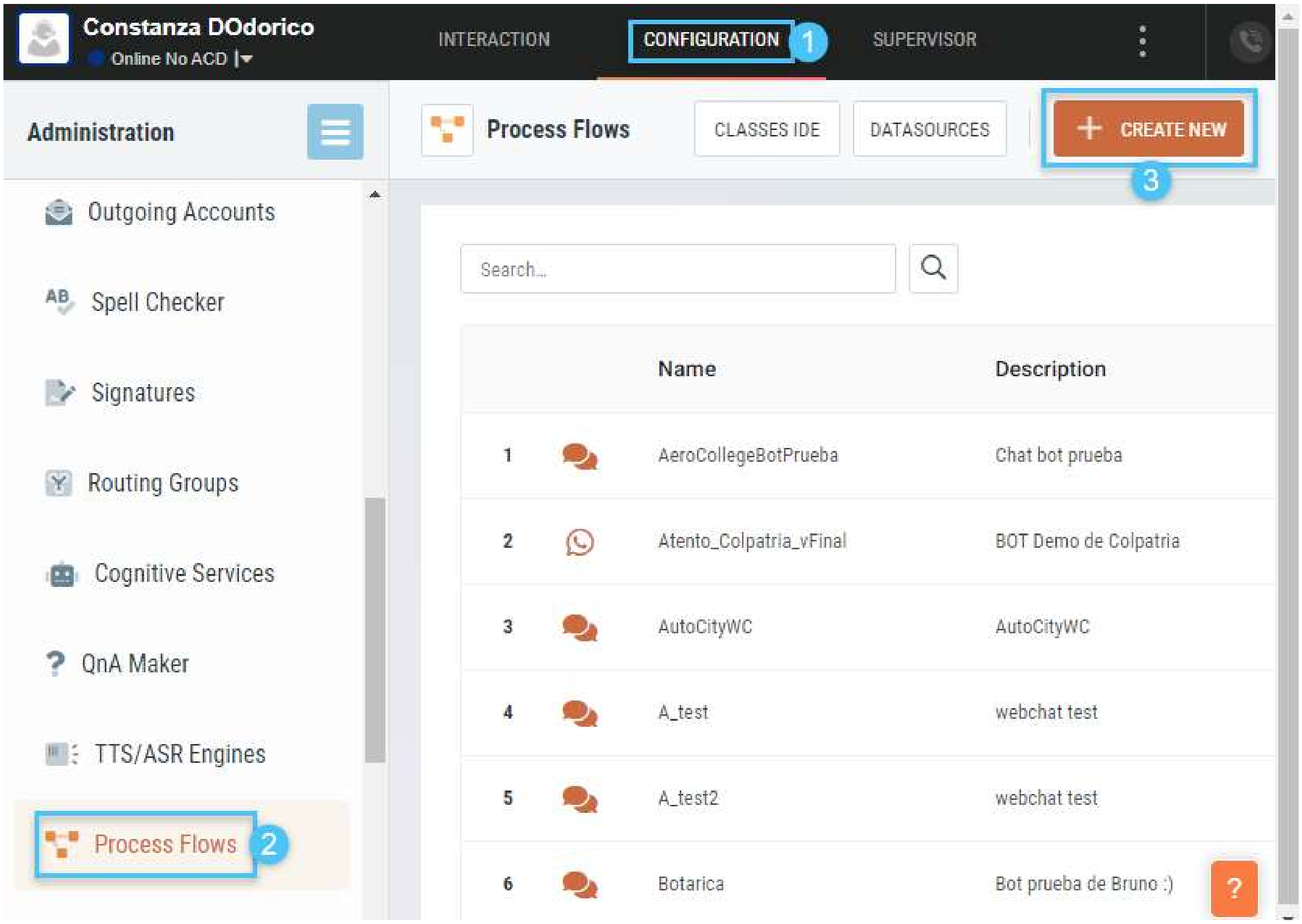
Description: enter a description of what the flow does

Type: select the type of bot. The available options are: Chat, Facebook, Twitter, Email, SMS and WhatsApp.

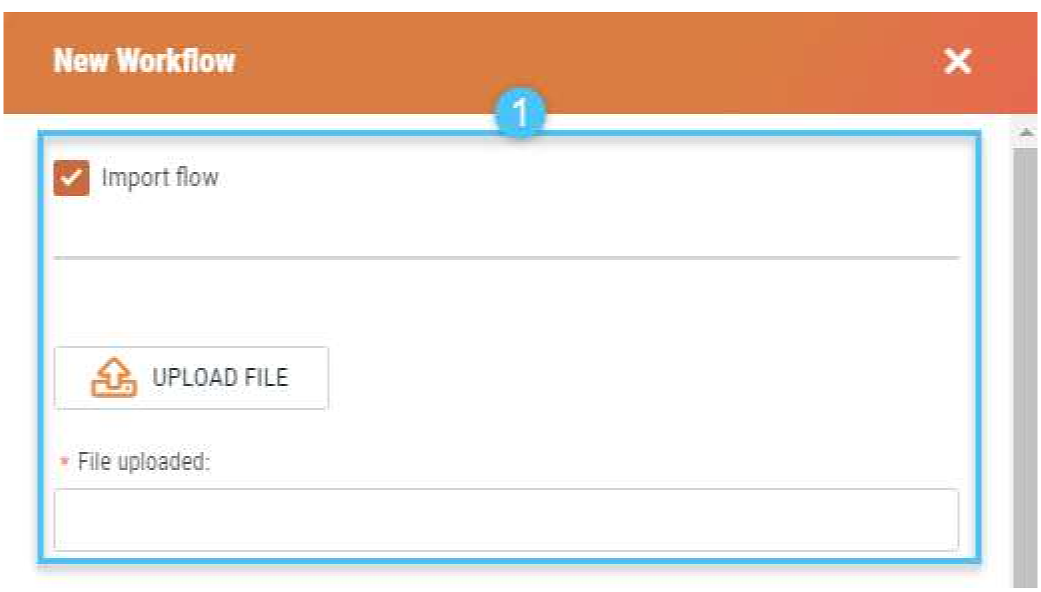
How to import a flow

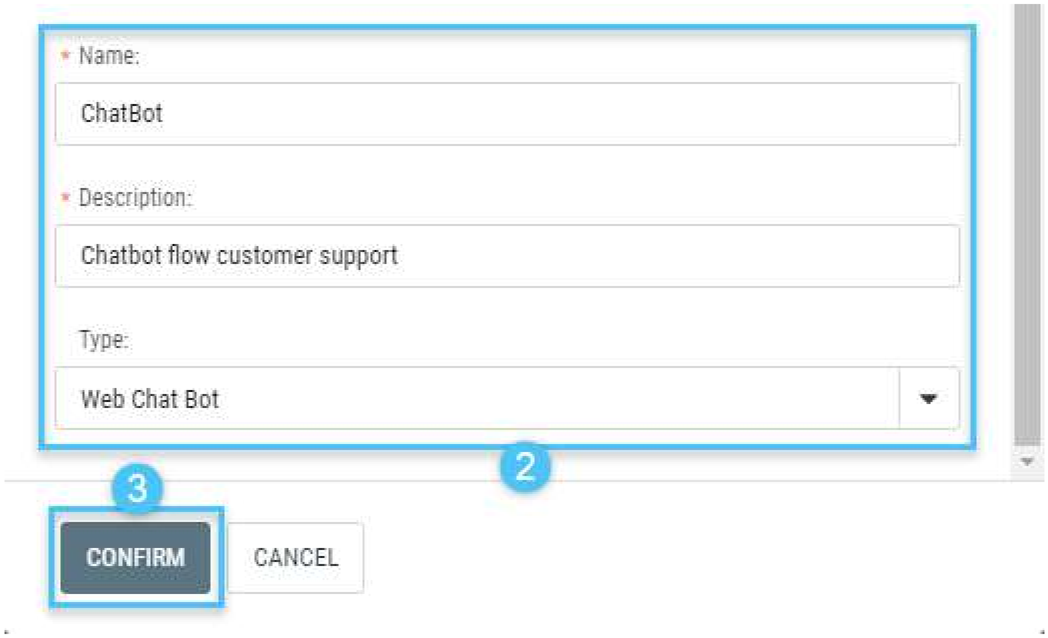
To import a flow:

1. Go to the **CONFIGURATION section (1)**, then to the **Process Flows section (2)** and **click on the "NEW FLOW" button (3).**



2. The following window will be displayed. **Import the flow, fill out the necessary information (2)** and then **click the "OPEN" button (3).**





Name: enter a name to identify the flow.

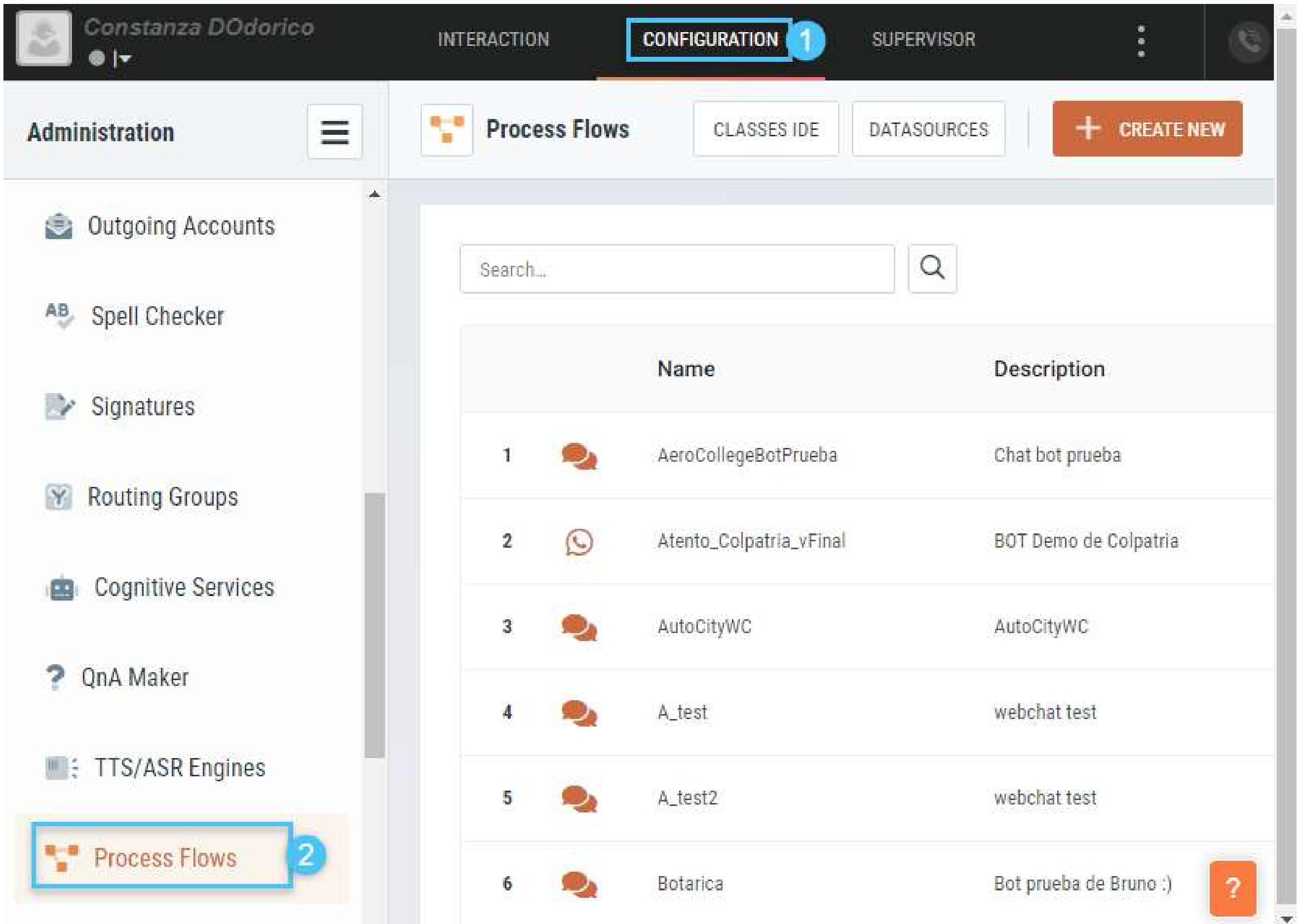
Description: enter a description of what the flow does

Type: select the type of bot. The available options are: Chat, Facebook, Twitter, Email, SMS and WhatsApp.

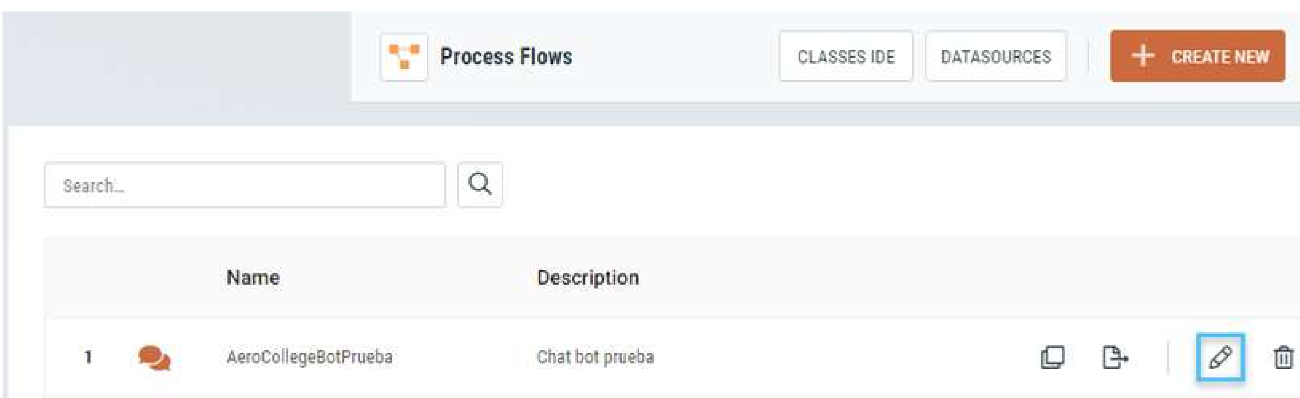
How to edit a flow

To edit a flow:

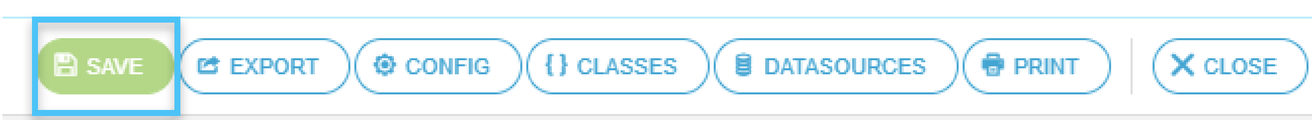
1. Go to the **CONFIGURATION section (1)**, then to the **Process Flows section (2).**



2. View the process you want to edit and **click on its "Edit" button.**



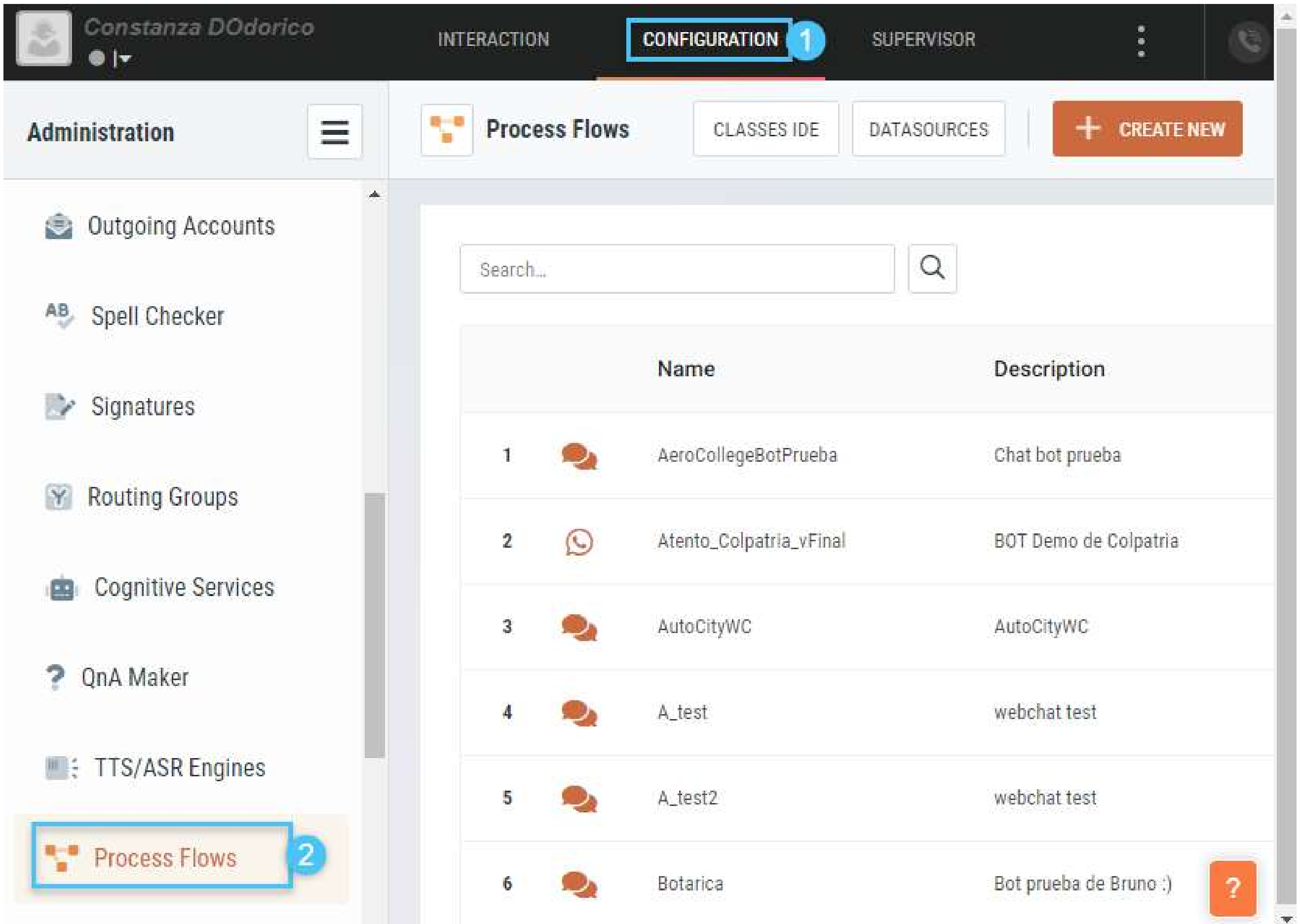
3. Make the necessary changes and **click on the "SAVE" button.**



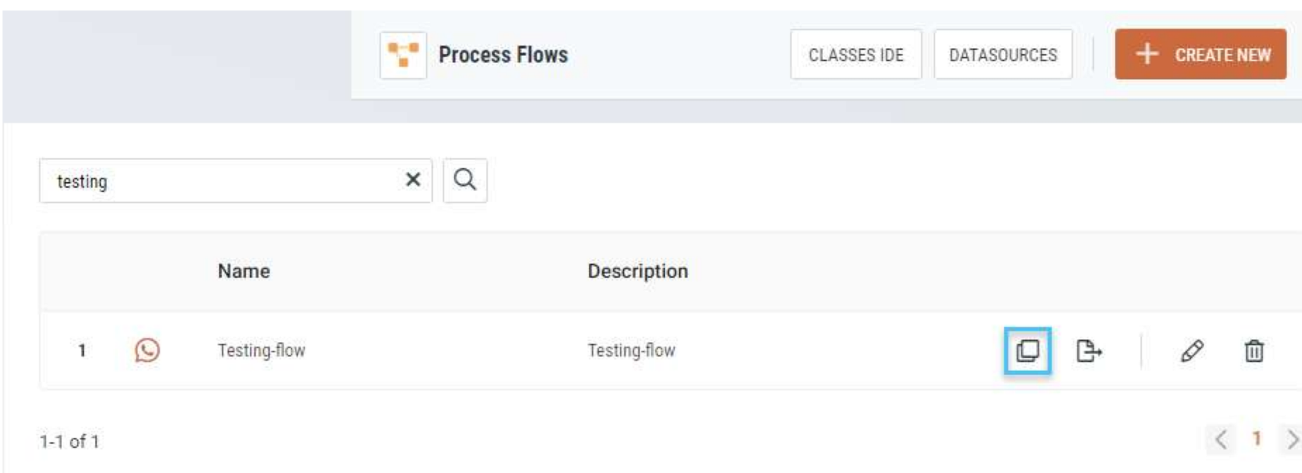
How to clone a flow

To clone a flow:

1. Go to the **CONFIGURATION section (1),** then to the **Process Flows section (2).**



2. View the flow you want to clone and **click on the "Clone" button.**

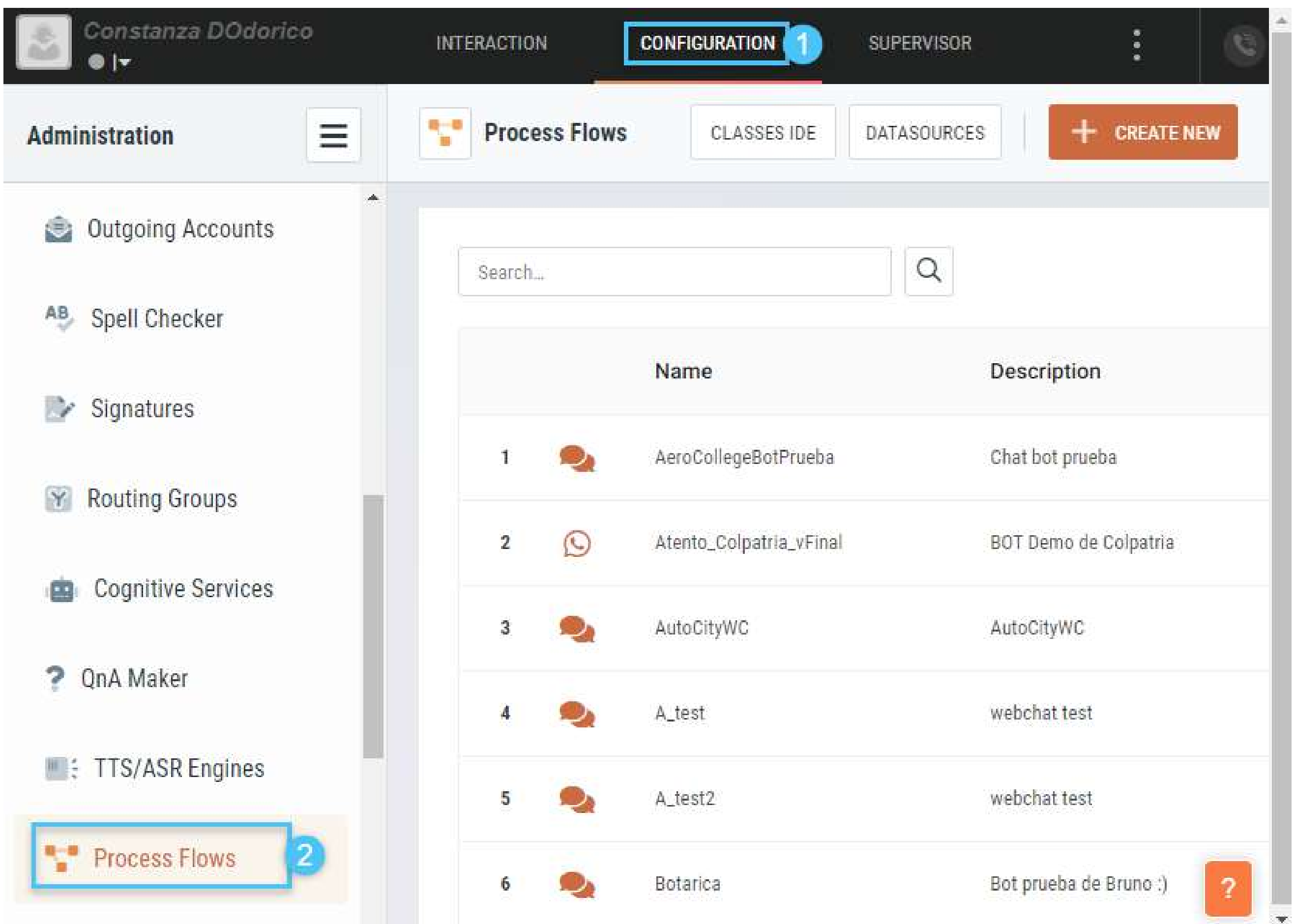


3. The following window will appear**; enter a name** for the flow and then **click on "CLONE".**

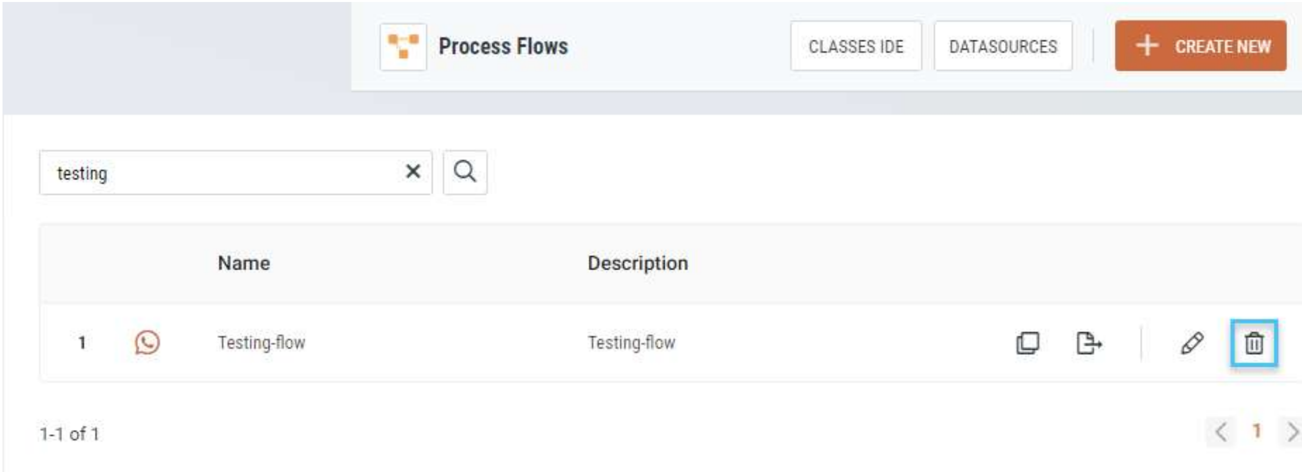
How to delete a flow

To delete a flow:

1. Go to the **CONFIGURATION section (1)**, then to the **Process Flows section (2).**



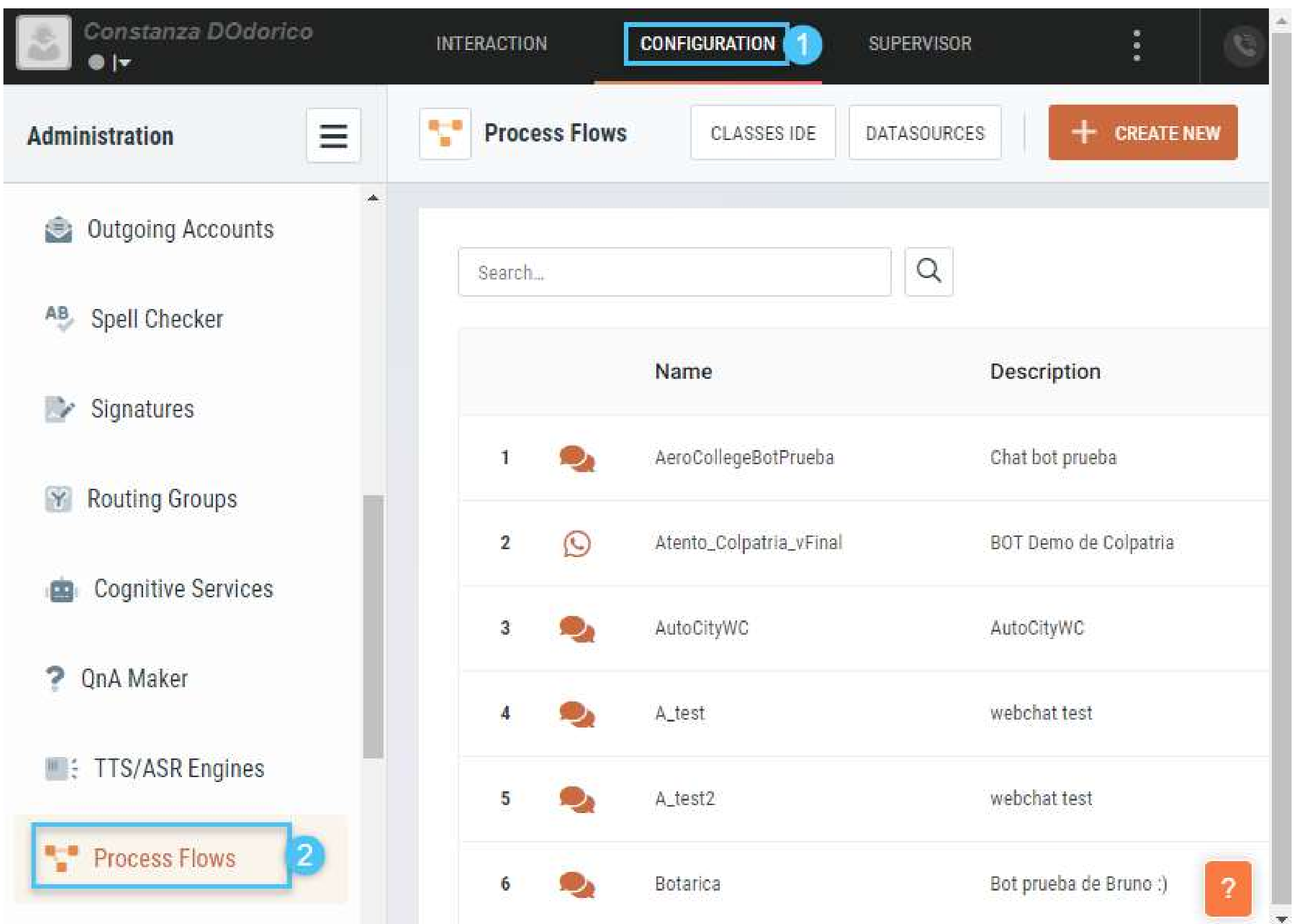
2. View the process you want to delete and click on the **"Delete" button.**



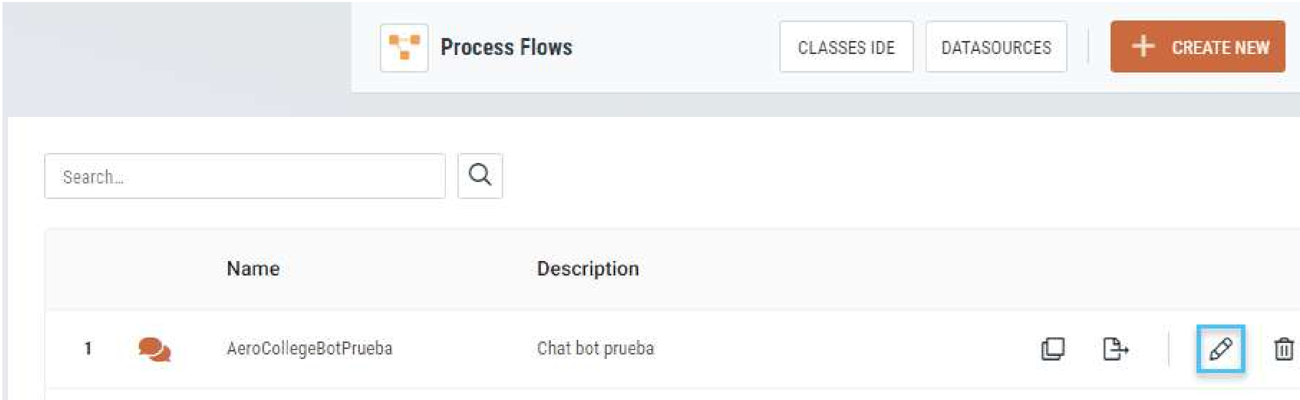
How to print a flow

To print a flow:

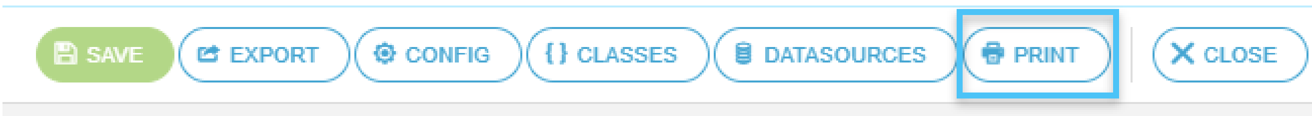
1. Go to the **CONFIGURATION section (1)**, then to the **Process Flows section (2).**



2. View the process you want to print and **click on the "Edit" button.**



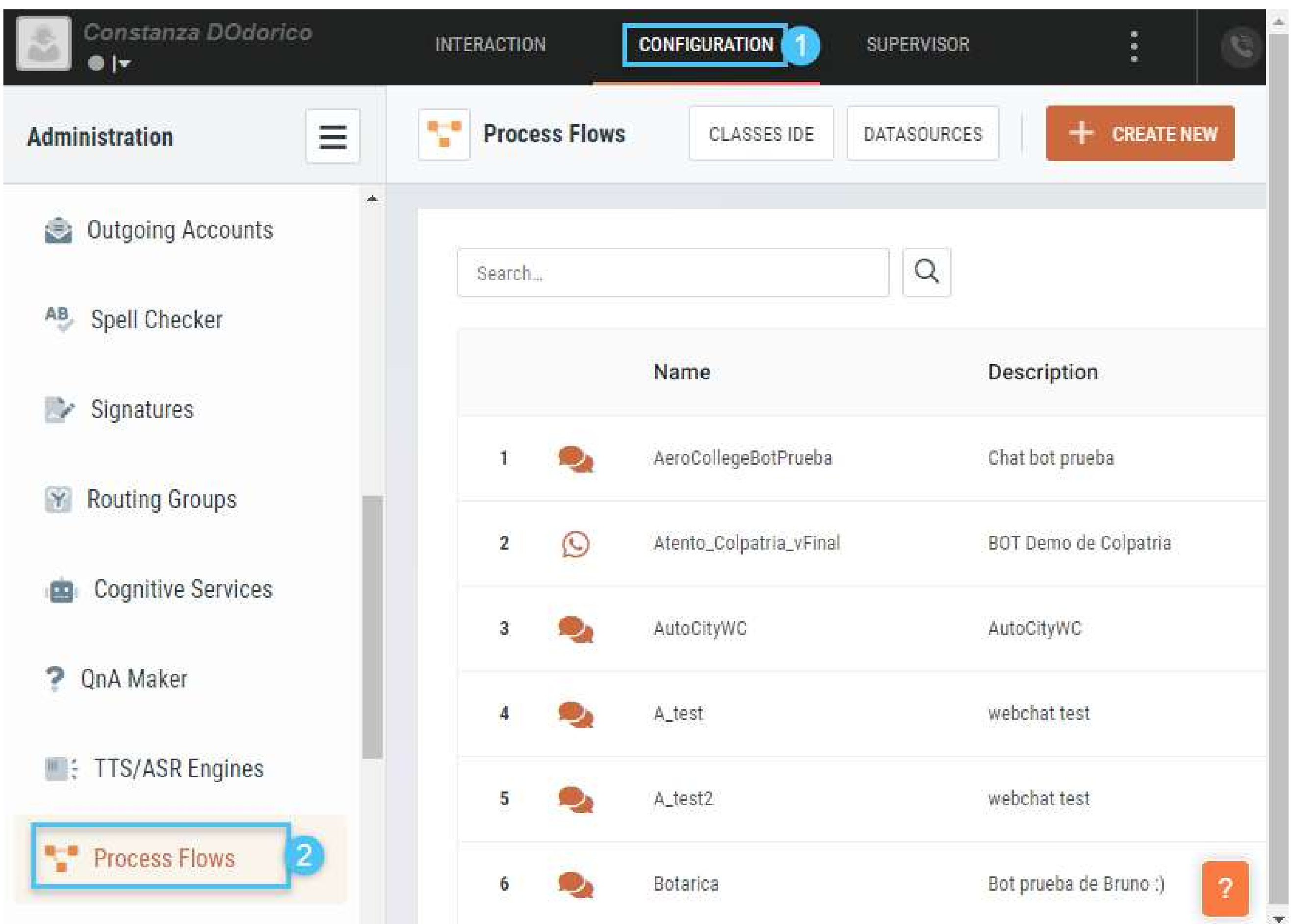
3. Then **click the "PRINT" button.**



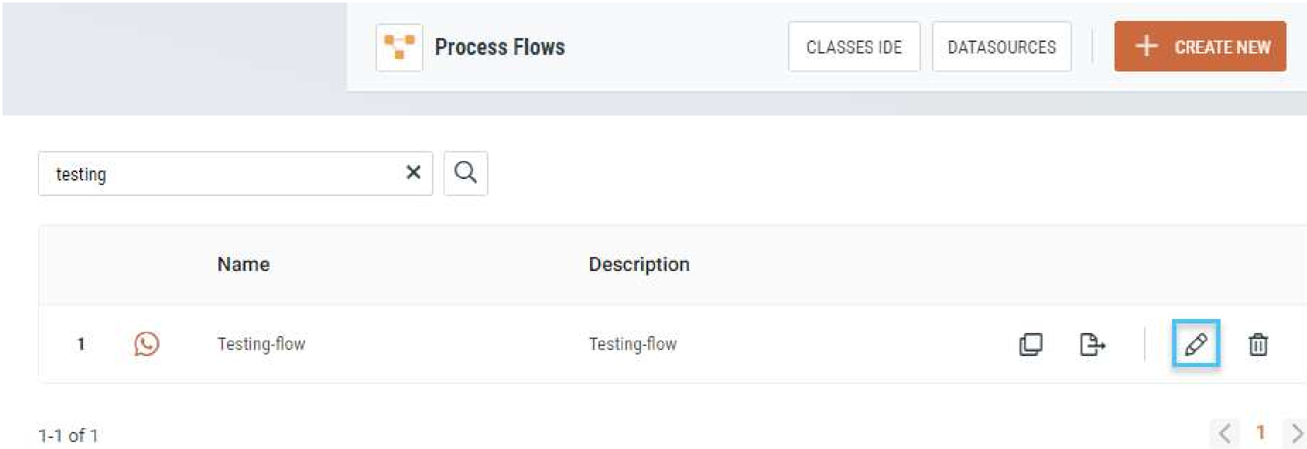
How to modify the name and description of a flow

To change the name and description of a flow:

1. Go to the **CONFIGURATION section (1)**, then to the **Process Flows section (2).**



2. View the process you want to print and **click on the "Edit" button.**



3. Click the **"CONFIG"** button.

4. Edit **the name** and **description** and then **click on the "OK" button.**

Usage examples

- Usage example: implement a solution (without Cognitive Services)
- Usage example: implementing a solution with Cognitive Services

Usage example: implement a solution (without Cognitive Services)

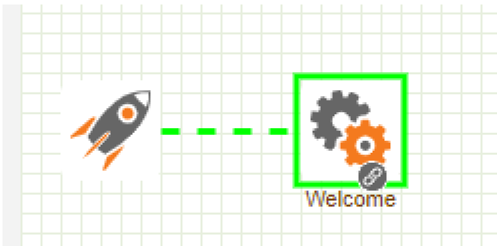
Description

In this example, we will initially show a welcome message, then the chatbot will ask the user how it can help. The user will then ask a question, the chatbot will determine whether the user asked something about their options and will show a message; if not, the chatbot will transfer the user to an agent to handle their inquiry. All the basic activities of a conversation will be used.

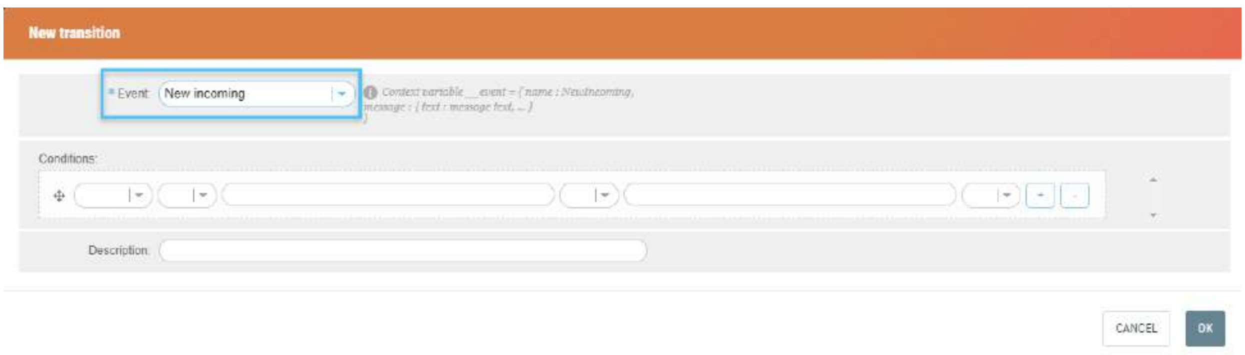
Implementation

1. Creating the first state.
   a. We create the first state called "Welcome"

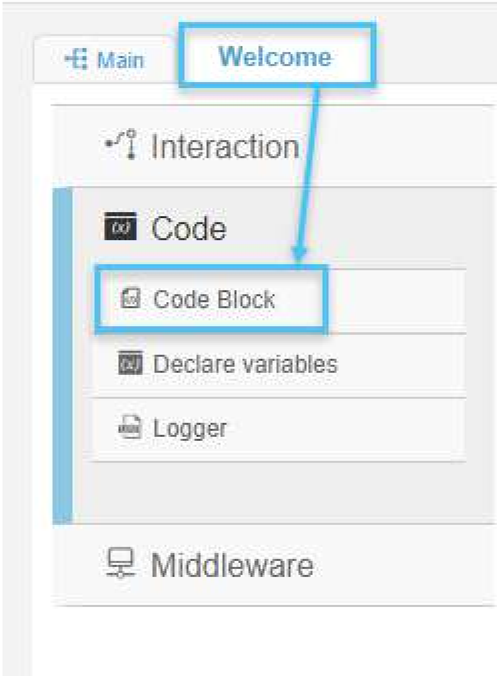
b. We then add a transition between the start of the process and the state we created.



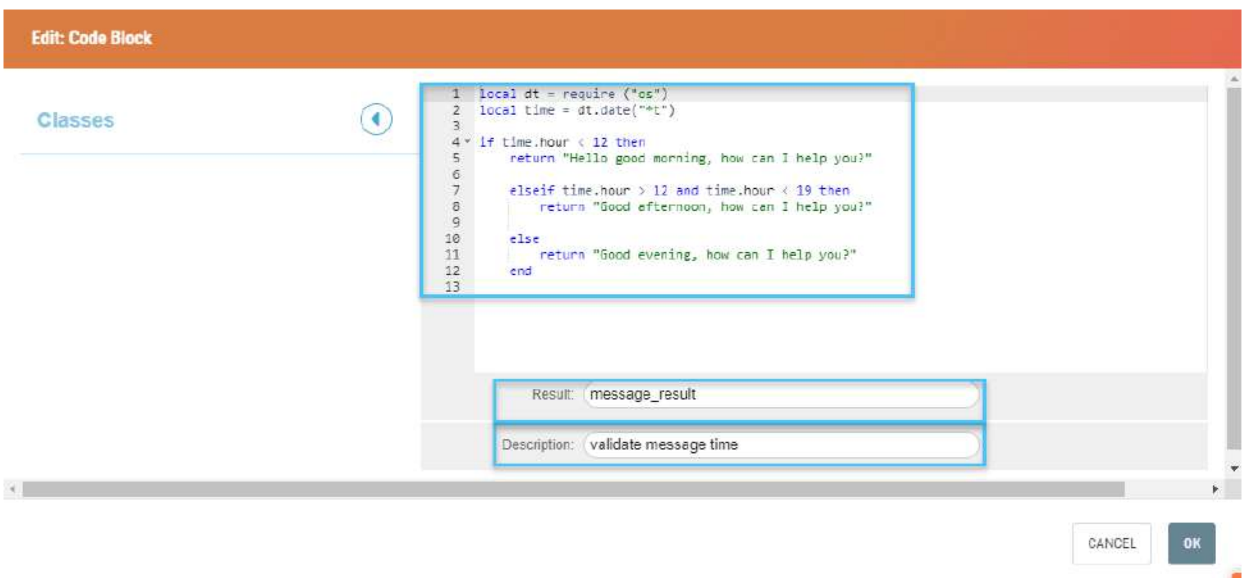
c. In the transition window, we add the event "New incoming" to indicate that it is a new entry.



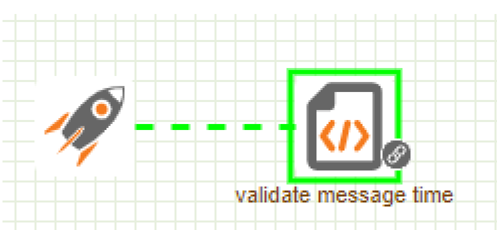
d. Within the "Welcome" state we add a Code Block activity.



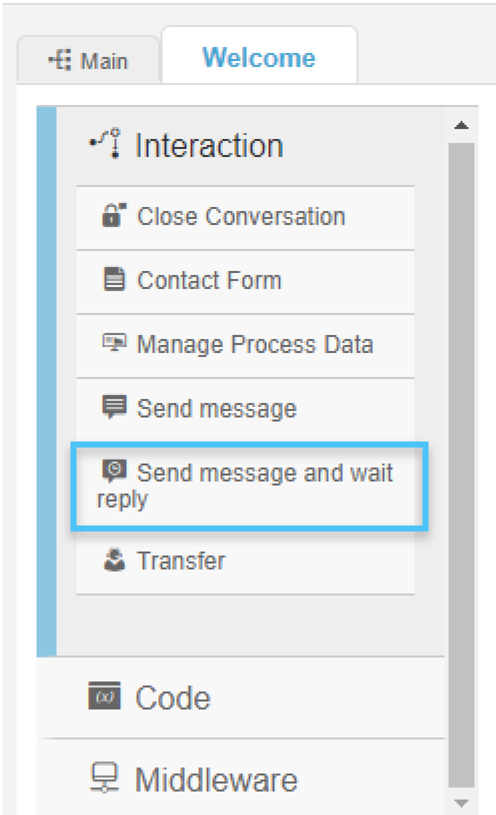
e. Within the editor, we add the Lua code that will allow us to check at what time of day the client wrote to us. In addition, we save the result of this activity as "message_result" for use later in the flow.



f. We link the beginning of the state with the activity we created.

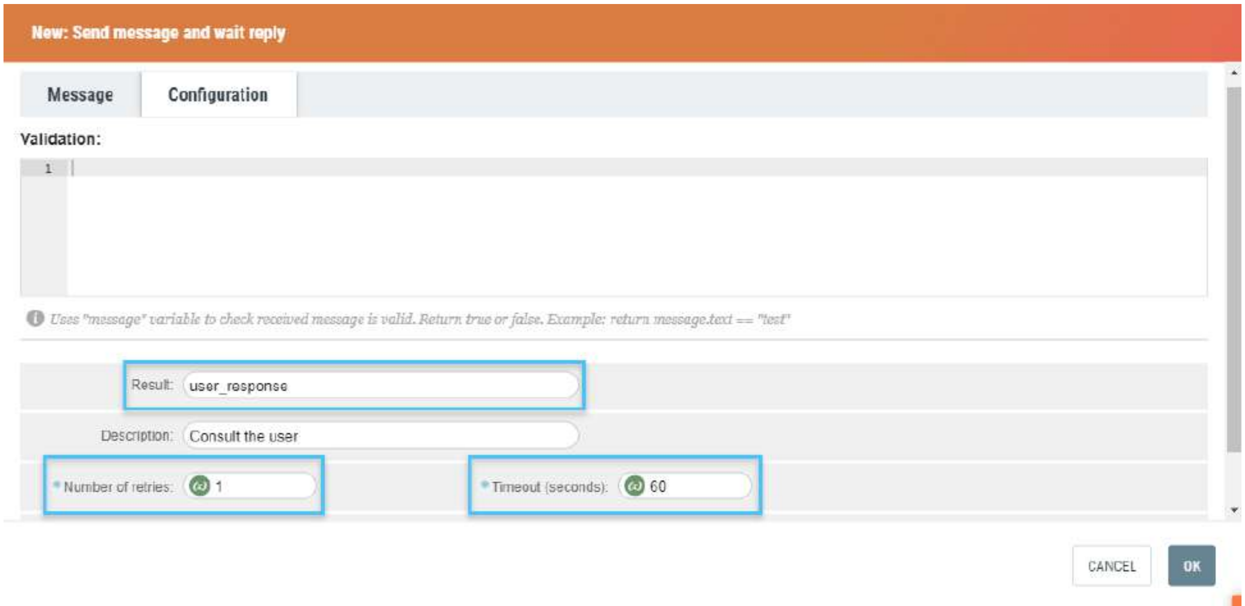


g. Then we add an Interaction- type activity; choose "Send Message and Wait".

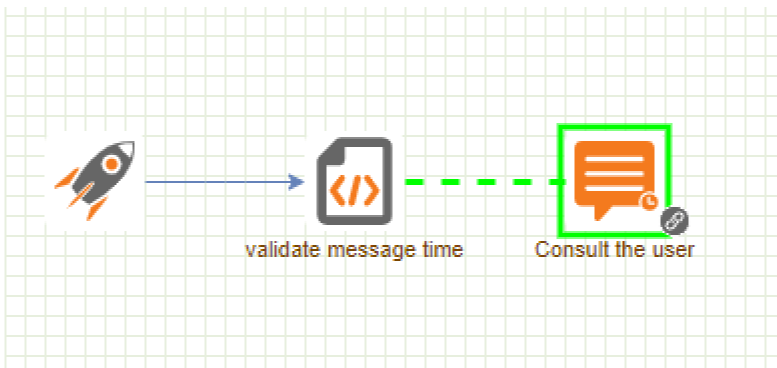


h. We select the message type "Text" and enter the name of the variable created in the code block. This will send a message to the client based on the time of day they wrote (which was detected and saved using the code block we created earlier).

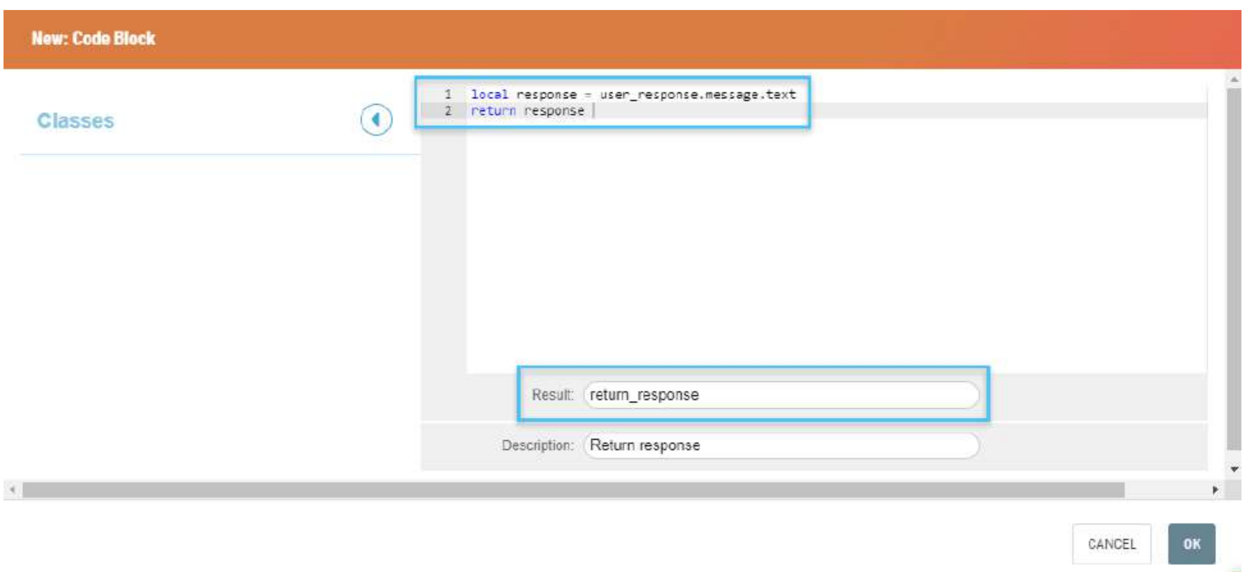
In the "SETTINGS" tab, we activate the option to show typing for 1 second. In addition, we add 1 retry in case of no response from the client, and a timeout of 60 seconds. We save the result in a variable called "user_response".



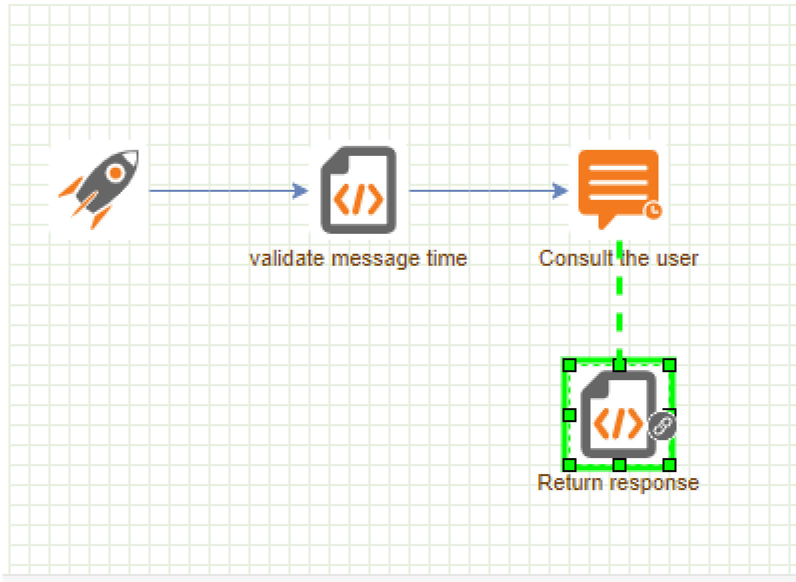
i. We link the last activity created with that of the code block.



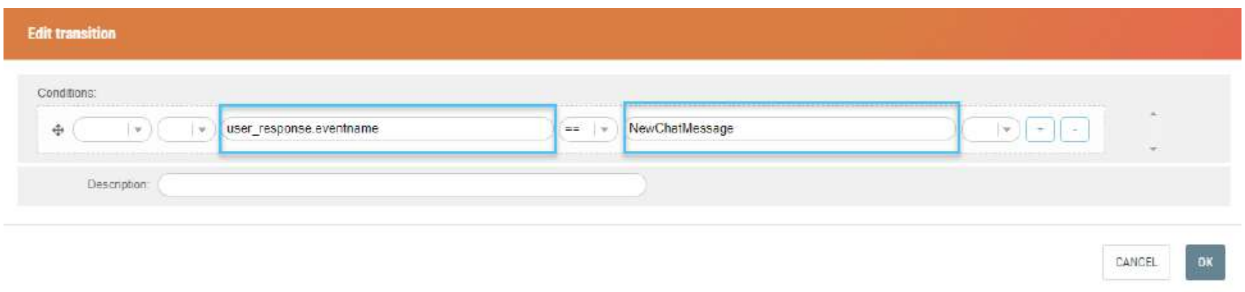
j. We add another code block to create the local variable "**response**", to capture what the user wrote that is hosted in the variable "**user_response.event.message.text"** and we return the result that will end up being saved in the field at the bottom, **"return_response".**



k. We link the last code block with the "Consult user" activity.

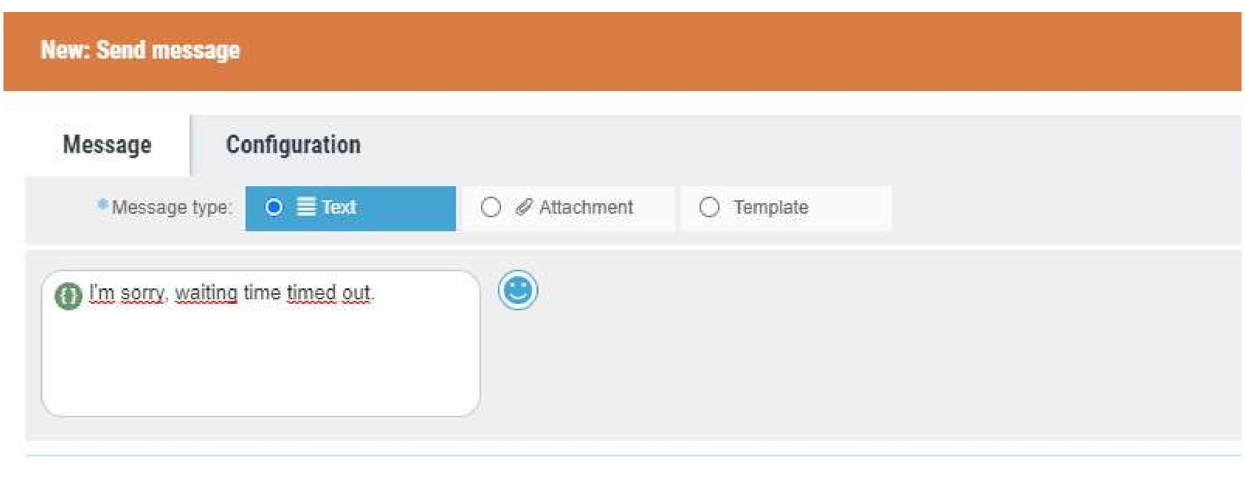


l. In the transition window, we indicate that the variable **"user_response.eventname"** is equal to **"NewChatMessage"** to identify that it is a response from the user.



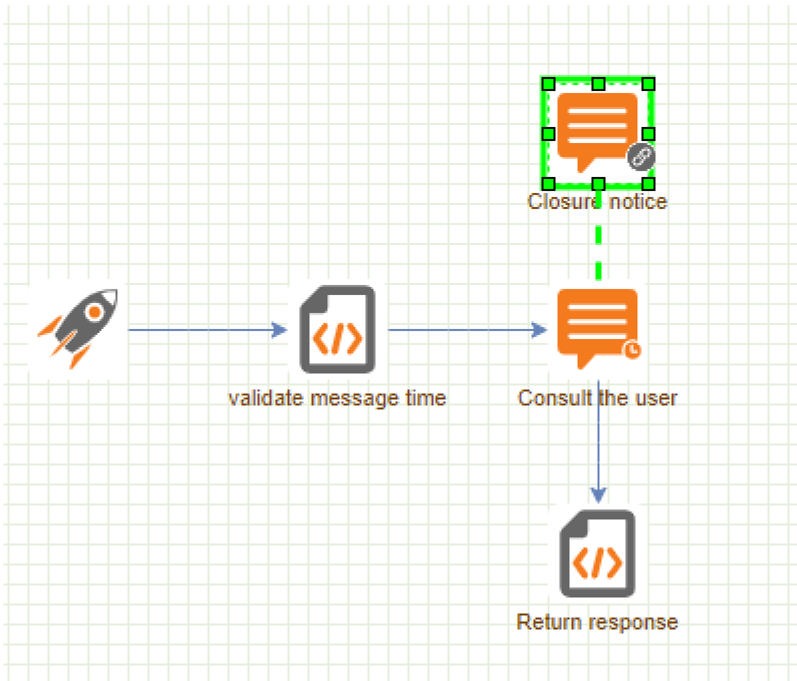
m. We select a new **Send Message** activity; this new message will be sent when the user is timed out.

In the **"MESSAGE - Text"** setting, we add a text string indicating that the timeout has been exceeded.

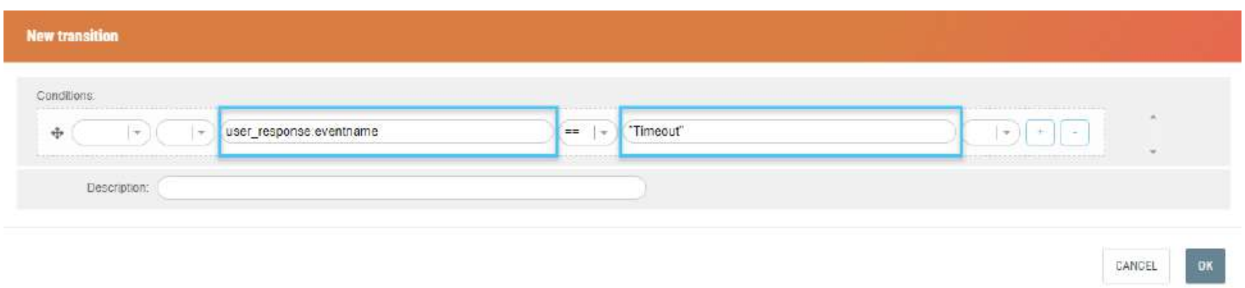


In the "**CONFIGURATION**" tab, we check **"Show typing"** and add a description to the **"Notification of Closure"** activity.

n. We link the **"Consult user"** and **"Notification of closure"** activities.

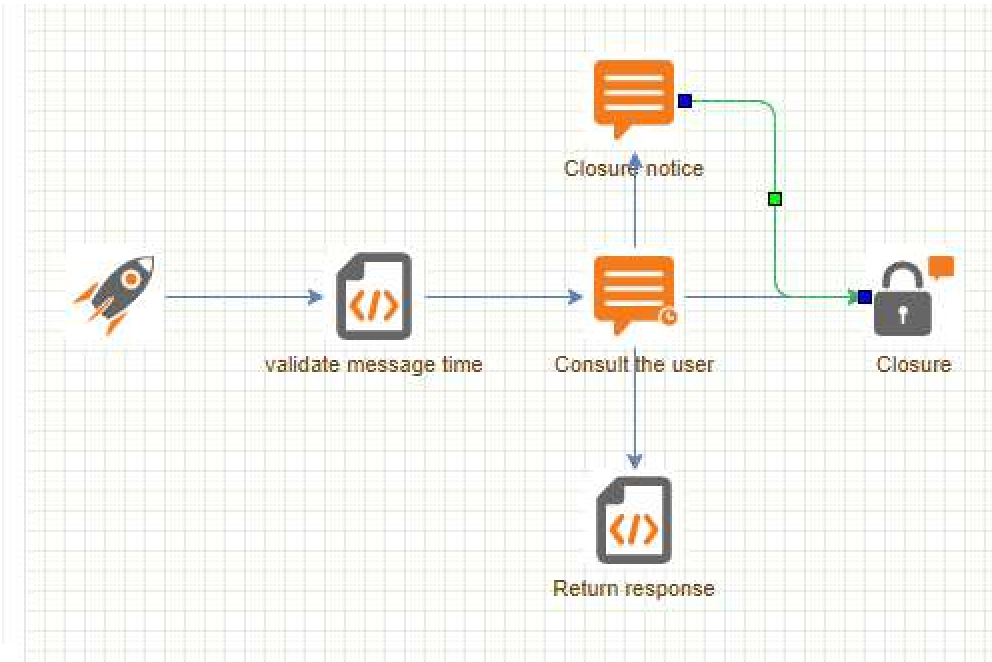


o. In the transition window we set the event for the variable in the previous activity to **"Timeout"** to signal when the timeout has been exceeded

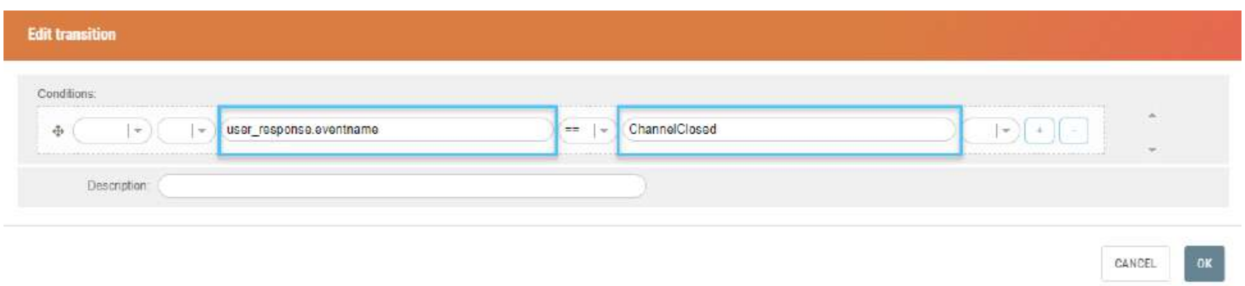


p. We add a new activity, **"Close Interaction"**, to end this state.

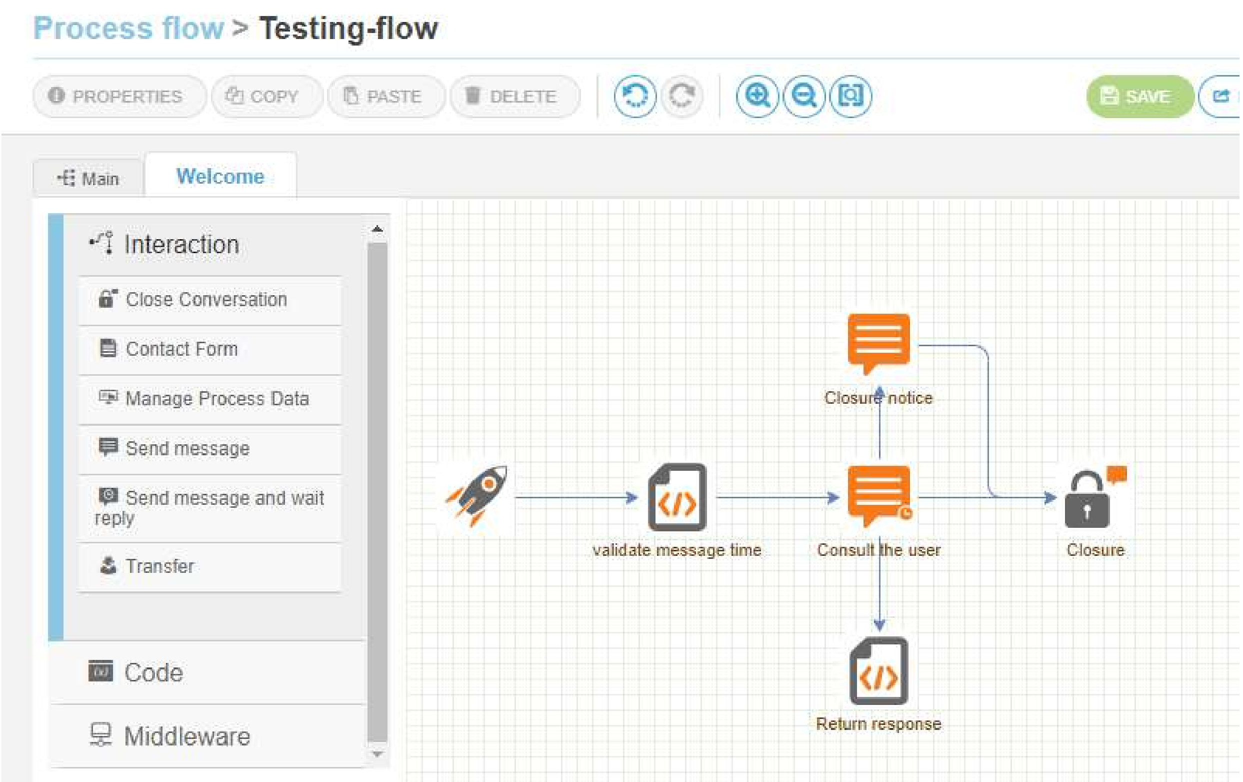
q. Lastly, we link the **"Consult user"** and **"Close"** activities.



r. In both transitions we set the event for the variable in the previous activity to **"ChannelClosed"** to signal that the user closed the chat



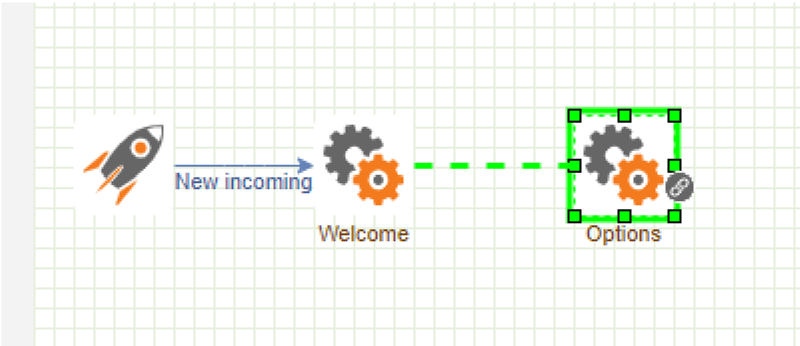
s. The design of the **“Welcome”** state will then be as follows:



2. Creating the second state

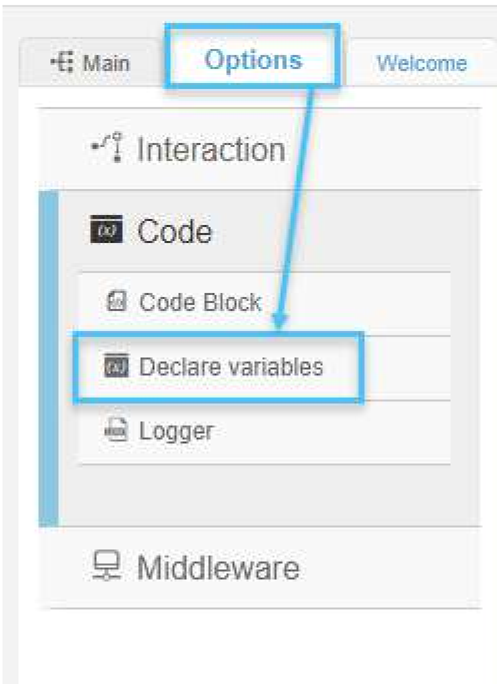
a. We create the second state with the name **"Options"** and description **"Options flow"**

b. We link the **"Welcome"** and **"Options"** states to generate the sequence of the conversation.

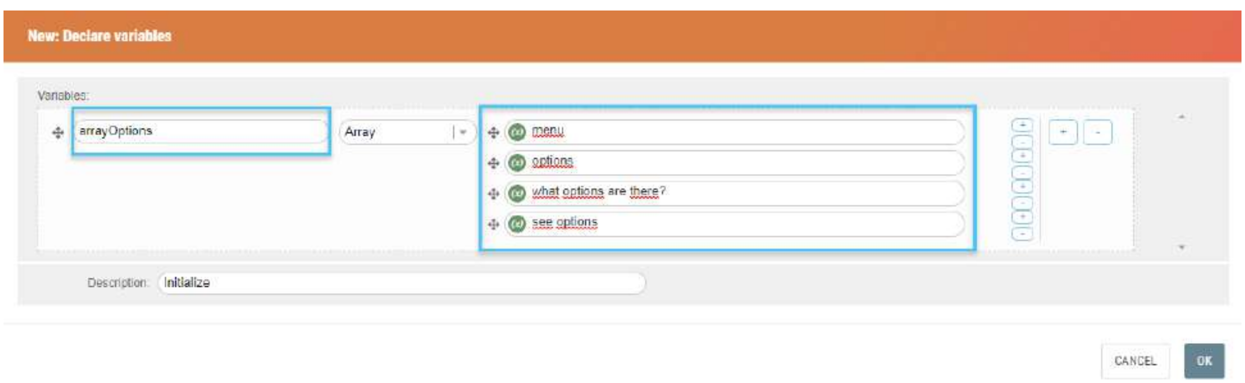


c. In the transition options we set the event to "No event".

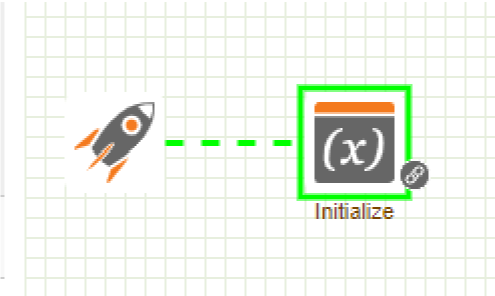
d. We go to the **"Options"** state and add a new **"Declare variables"** activity.



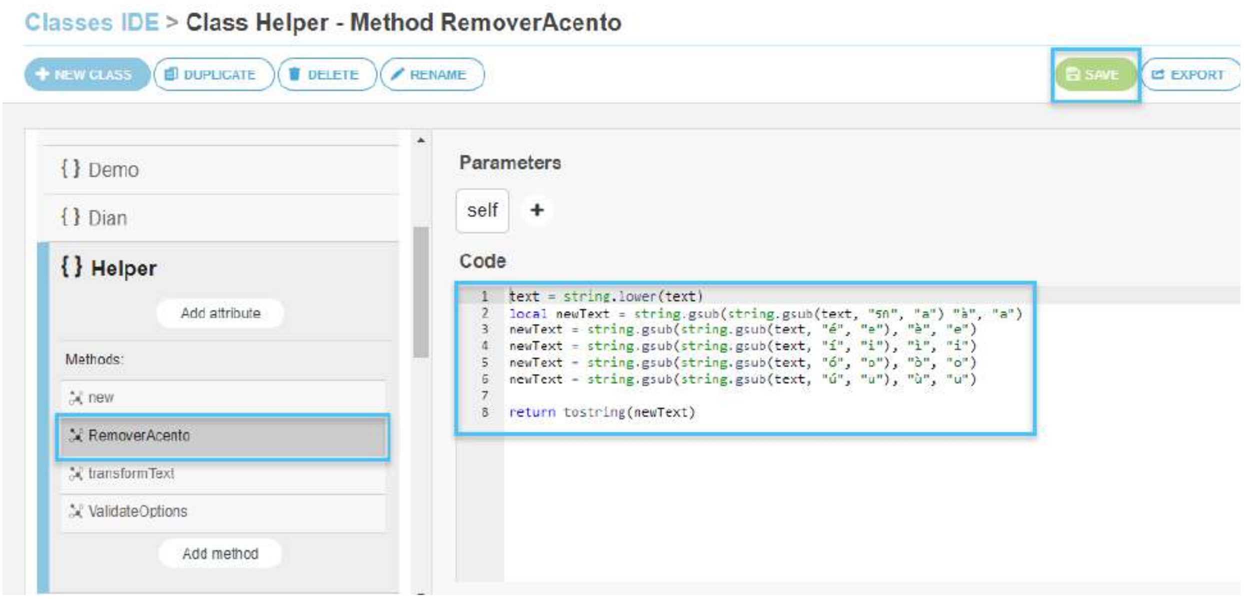
e. We add an array that contains phrases referring to different ways of asking about options.



f. We link the **"process start"** with the **"Initialize"** activity.



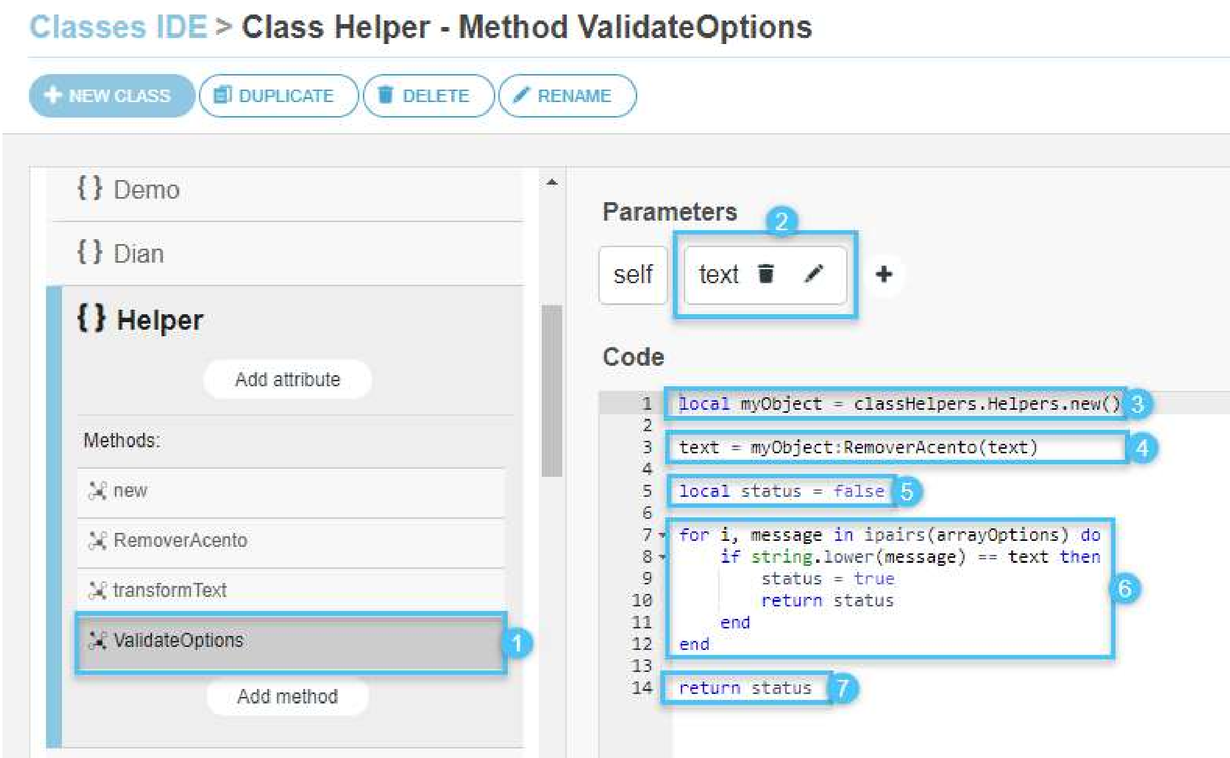
g. We create a class to be able to remove accents.



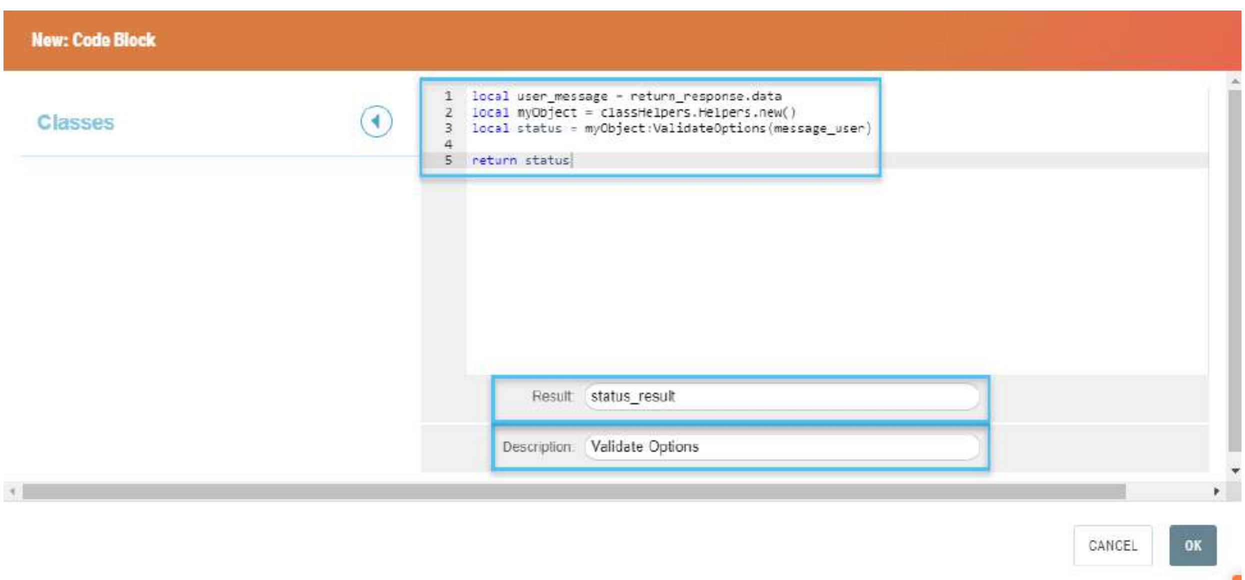
h. We create another method named **"ValidateOptions" (1)**

(2) We add the "**text"** parameter
(3) We create a "**myObject**" variable that instantiates the class containing the **"RemoveAccent"** method
(4) We remove any accents contained in the phrase entered as a parameter using the **"RemoveAccent"** method
(5) We state a local variable that is initially false
(6) In a **"for"** structure we do a search matching the phrase entered as a parameter with the array we created; if found, it returns the status “true”

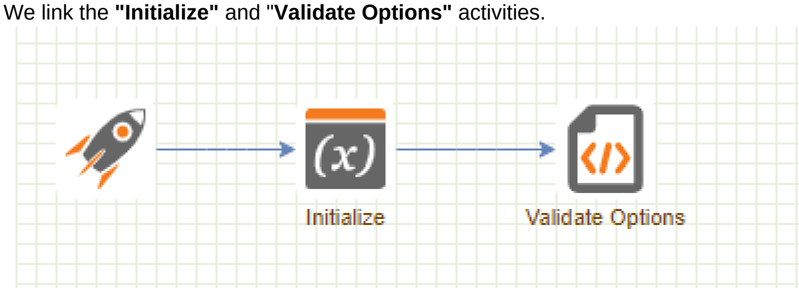
(7) Otherwise, it returns “false”



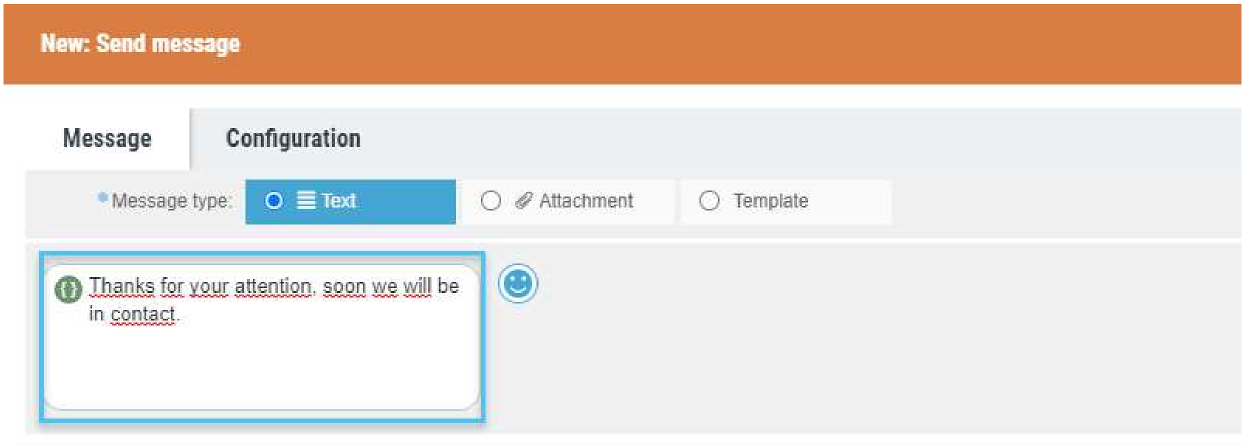
i. We add a new code block.



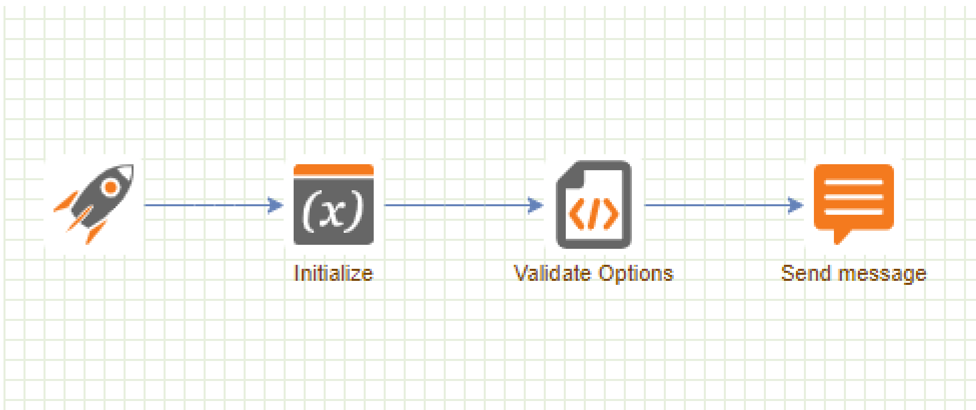
j. We link the **"Initialize"** and "**Validate Options"** activities.



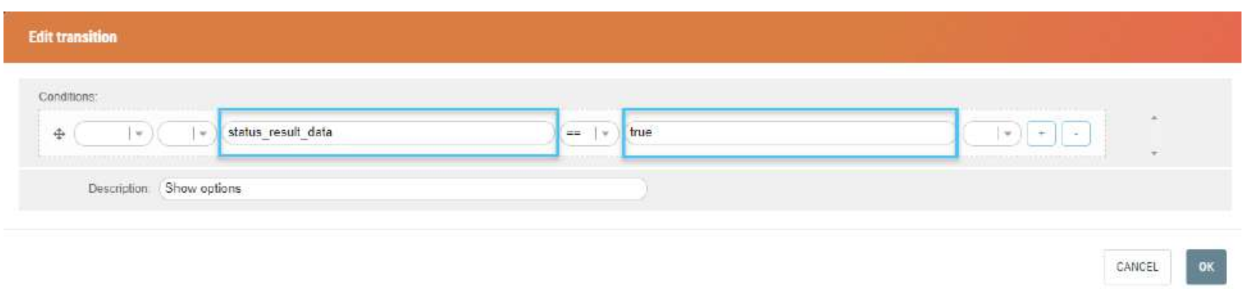
k. We add a new **"Send Message"** activity.



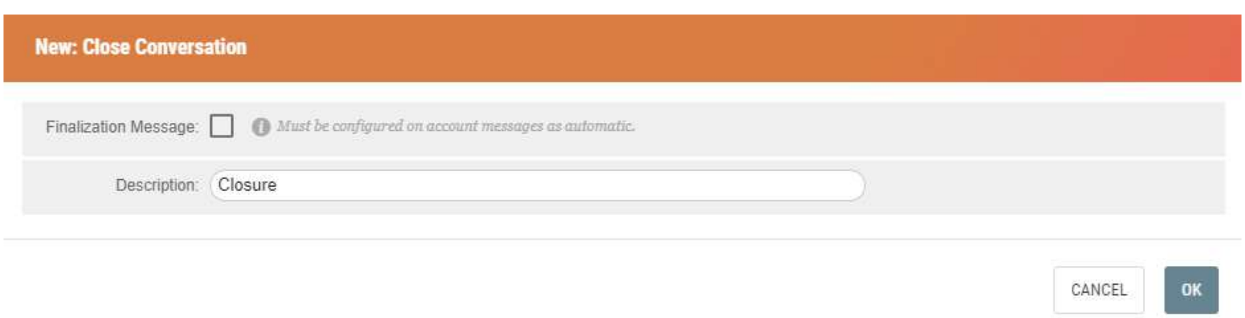
l. We link the "**Validate Options**" and “**Send Message**" activities.



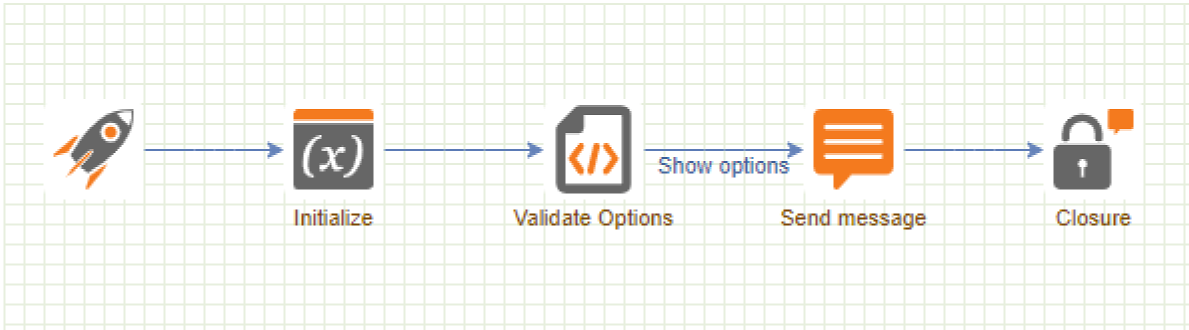
We add a transition.



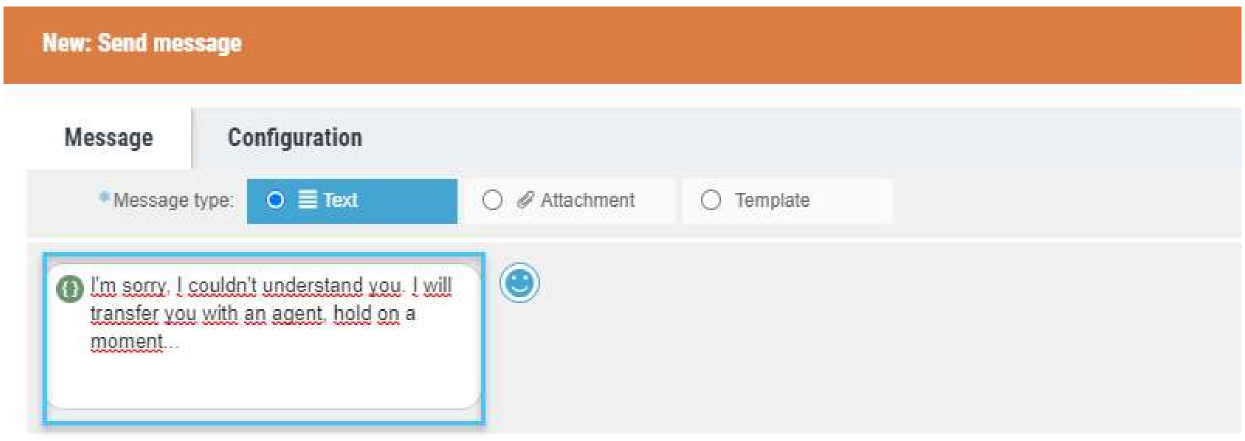
m. We add a new **"Close Interaction"** activity to end the "Options" state.



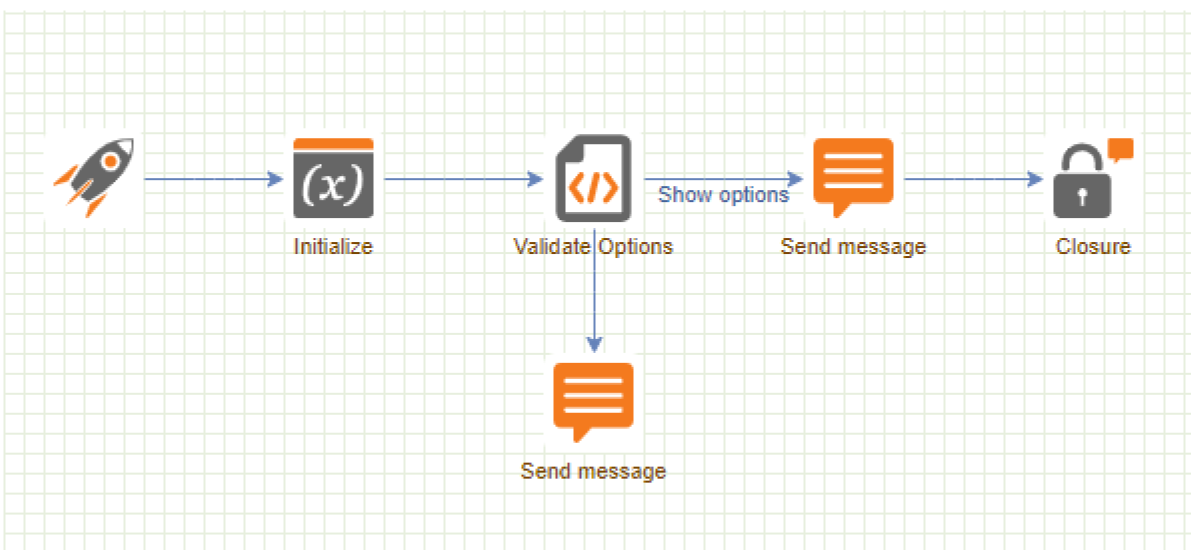
n. We link the **"Send Message"** and **"Close"** activities.



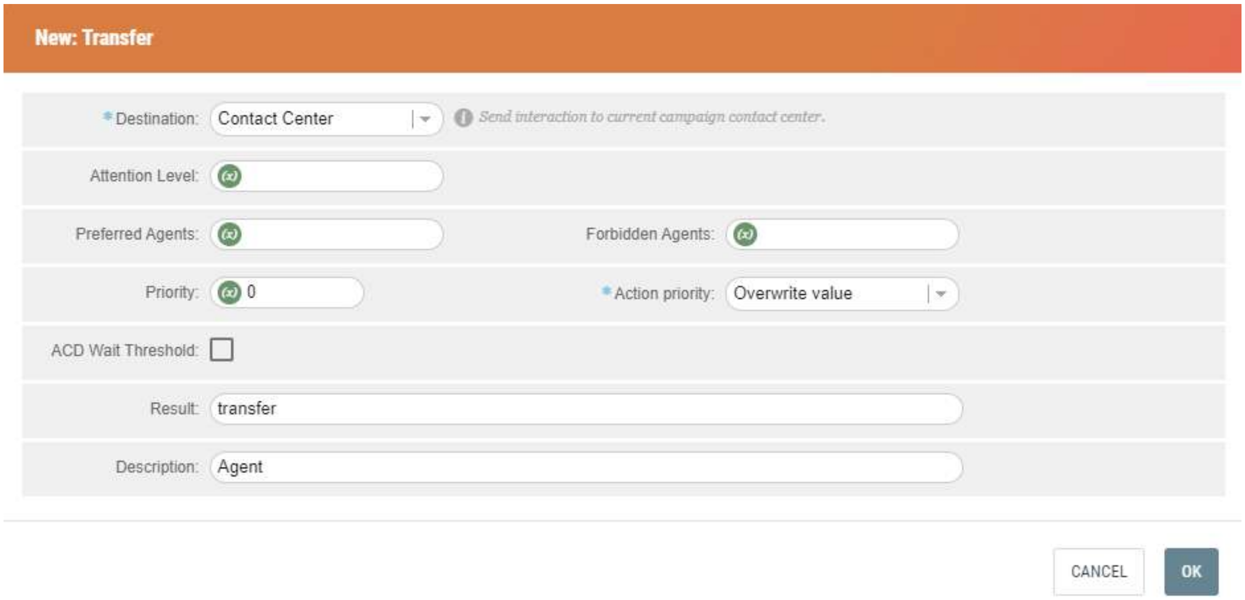
o. We add a new "**Send Message**" activity which will be shown when the result of the "**status_result**" variable is "**false**".



p. We link the **"Validate Options"** and **"Send Message"** activities.

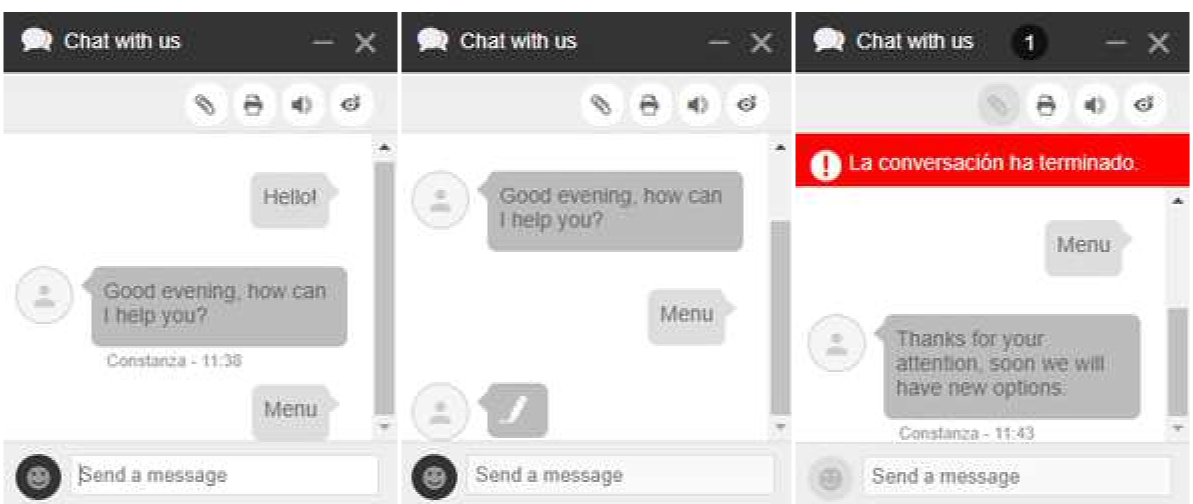


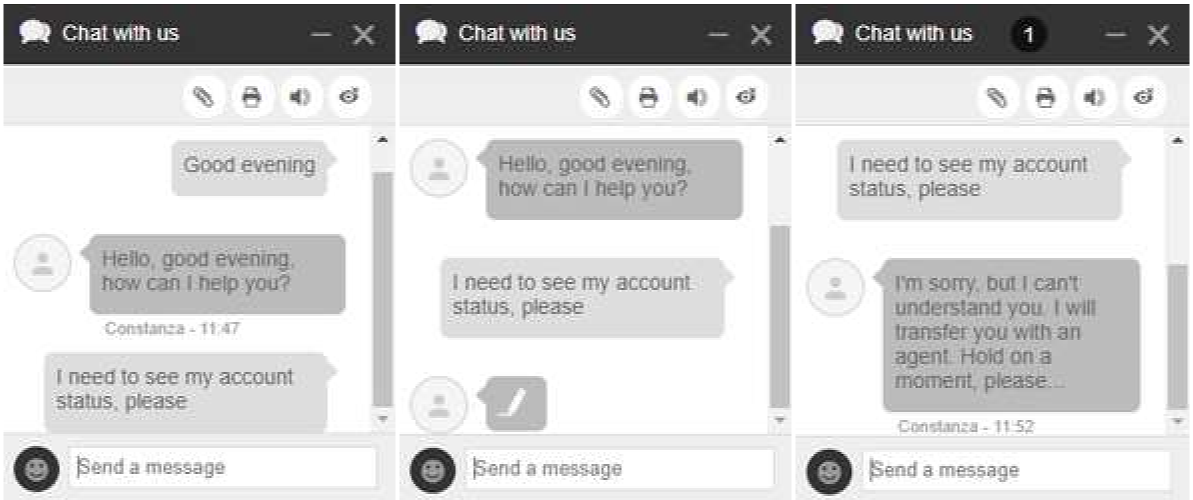
q. We add a new **"Transfer"** activity for communications between the user and an agent.



r. Link the **"Send Message"** and **"Agent"** activities

3. See results





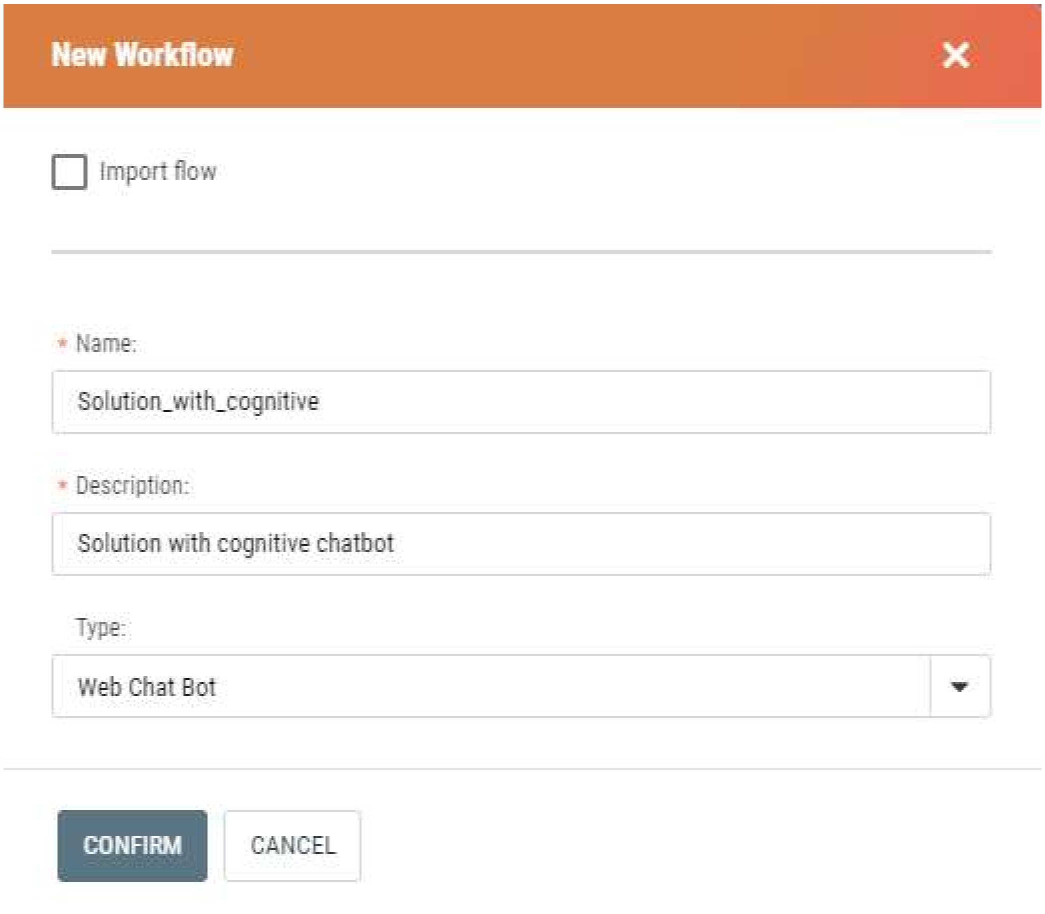
Usage example: implementing a solution with Cognitive Services

Description

In this example, initially we will display a welcome message; next, the chatbot will ask the user what help they need. The user will have to ask a question, which will then be sent to the LUIS Cognitive Service, which will return values based on confidence level. Chatbot response messages are based on providing information about the Azure cloud, which will be categorized by entities, i.e., the chatbot will know when the user needs information about: free Azure account, student account, Azure pricing or any general information. It will also know how to respond to greetings and thanks.

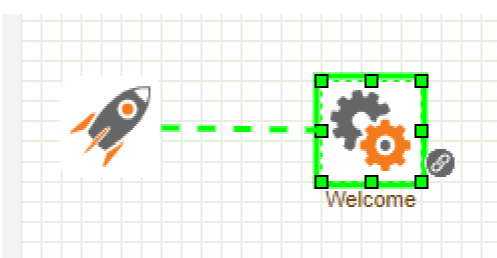
Implementation

1. Creating the first state.
   a. First we create the flow.



b. We create a state with the name **"Welcome"** and the description **"Welcome flow"**

c. We link the process start with the "Welcome" state.



d. In the transition window we indicate that it will be the **"New incoming"** option to notify it that it is a new entry.

e. Within the state that has been created, we add a Code Block activity.

See code...

We state variables that obtain properties from the date and time functions.

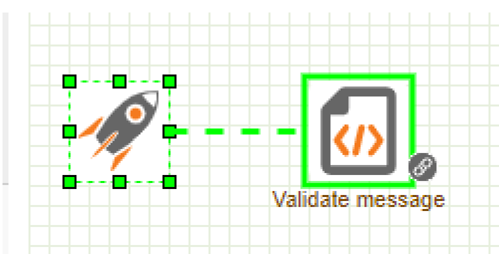
Once the date and time have been captured, we set the conditions using **"if", "elseif"** and **"else"** statements to display a welcome message according to the time of day.

The result field is the name of the variable in which the final message will be saved, (***message_result***). It is important to bear this variable in mind for the next interaction.

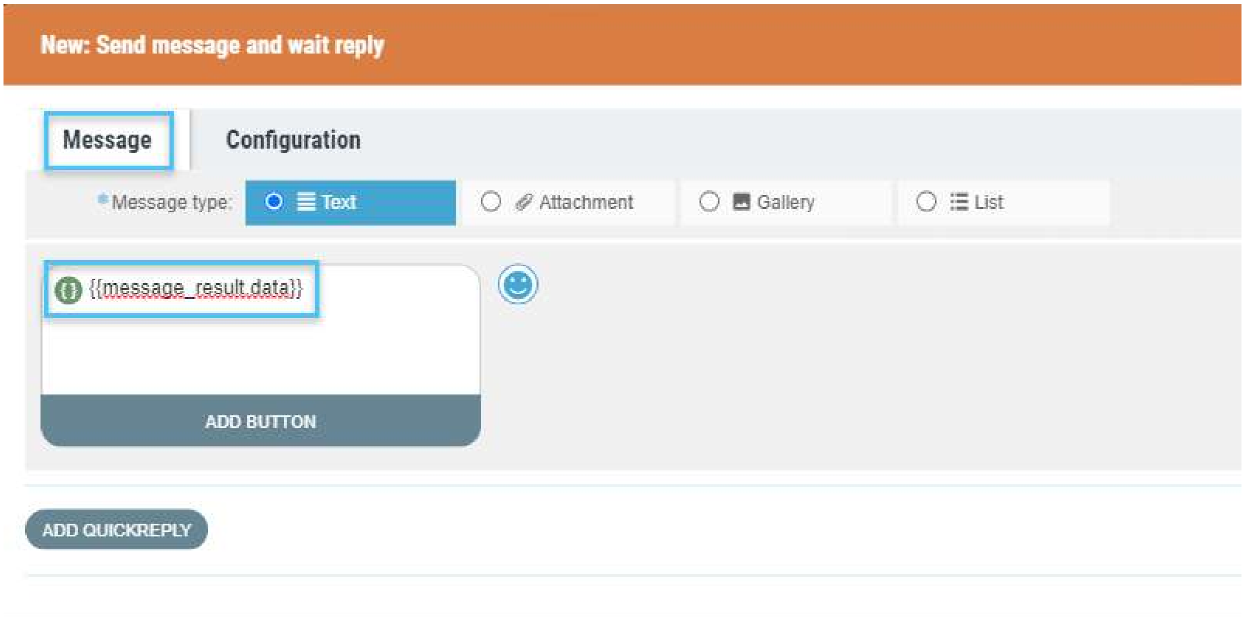
The Description field is a description of the activity that will be displayed in the diagram.

```
local dt = require ("os")
local time = dt.date("*t")

if time.hour < 12 then
        return "Hola buenos dias. Como le puedo ayudar?"

elseif time.hour >= 12 and time.hour < 19 then
        return "Hola buenas tardes. En que le puedo ayudar?"

else
        return "Hola buenas noches. Como le puedo ayudar?"
end
```

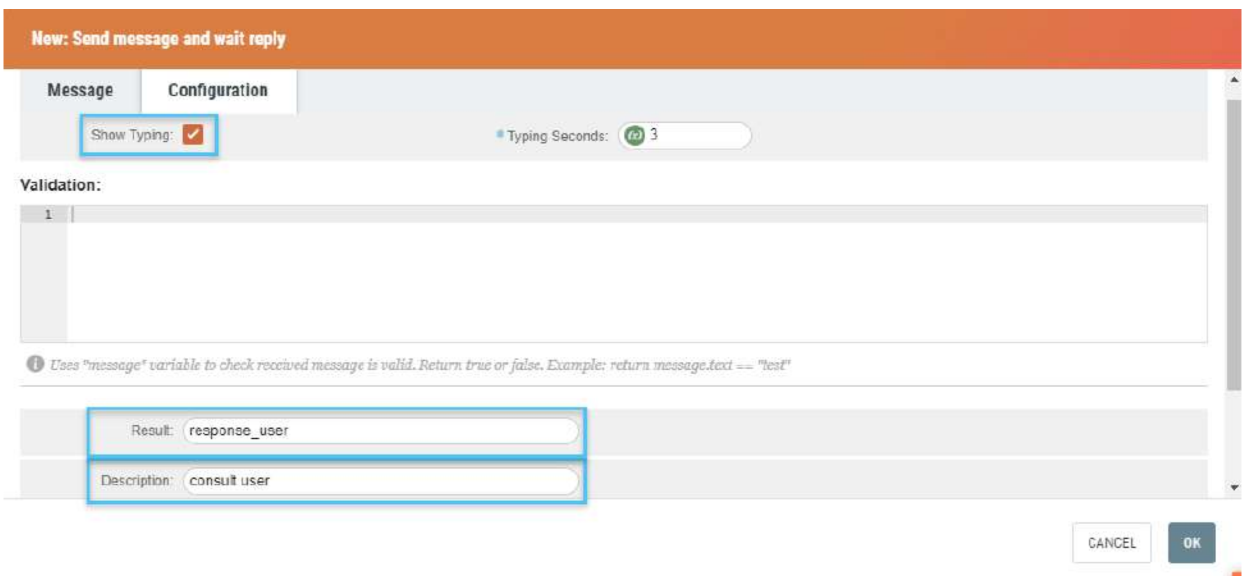
f. We add a transition between the code block and the process start.



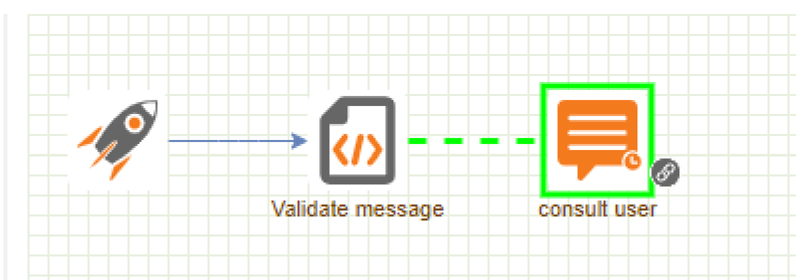
g. We add a "Send message and wait reply" activity. The activity's options will be shown. In the **MESSAGE** – **Text** option, we add the message that the previous "Code Block" activity returned with the "***message_result***" variable, adding **".data"** enclosed in double brackets. ***{{message_result.data}}***



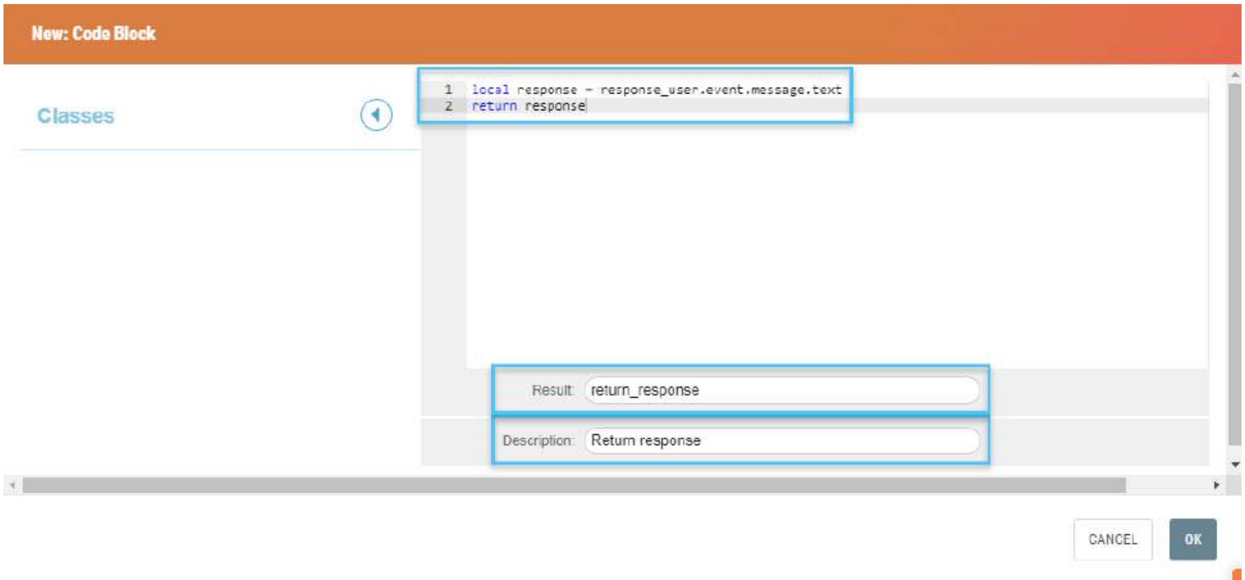
In the following "**CONFIGURATION**" tab, we indicate whether we want the chat "typing" icon to be shown, the number of retries, and timeout. The user's response will be saved in the "**Result**" field.



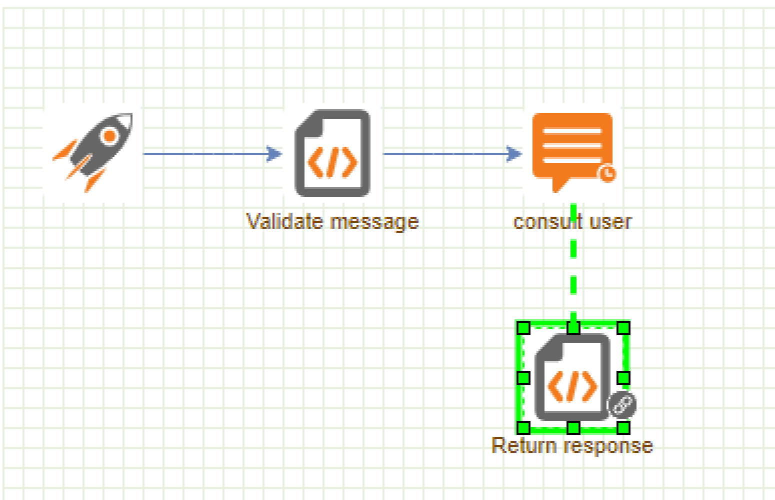
h. We add a transition between the code block and the Send Message activity.



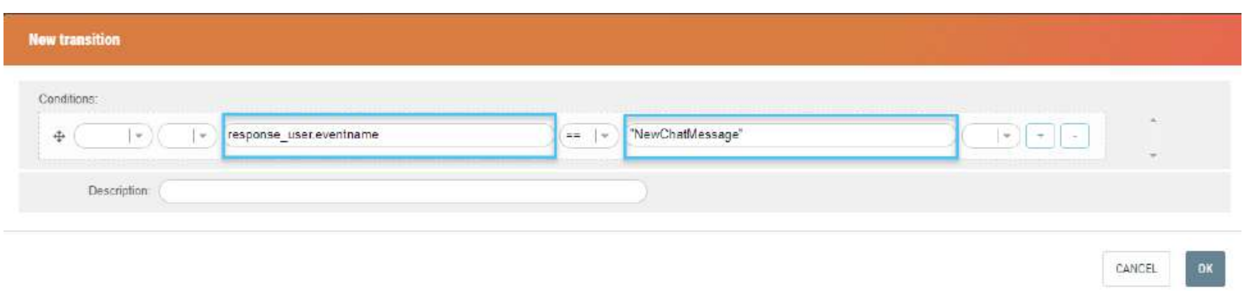
i. We create the "**response**" local variable to capture what the user wrote that is stored in the "**response_user.event.message.text**" variable and we return the result that will be saved in the field at the bottom, "**return_response".**



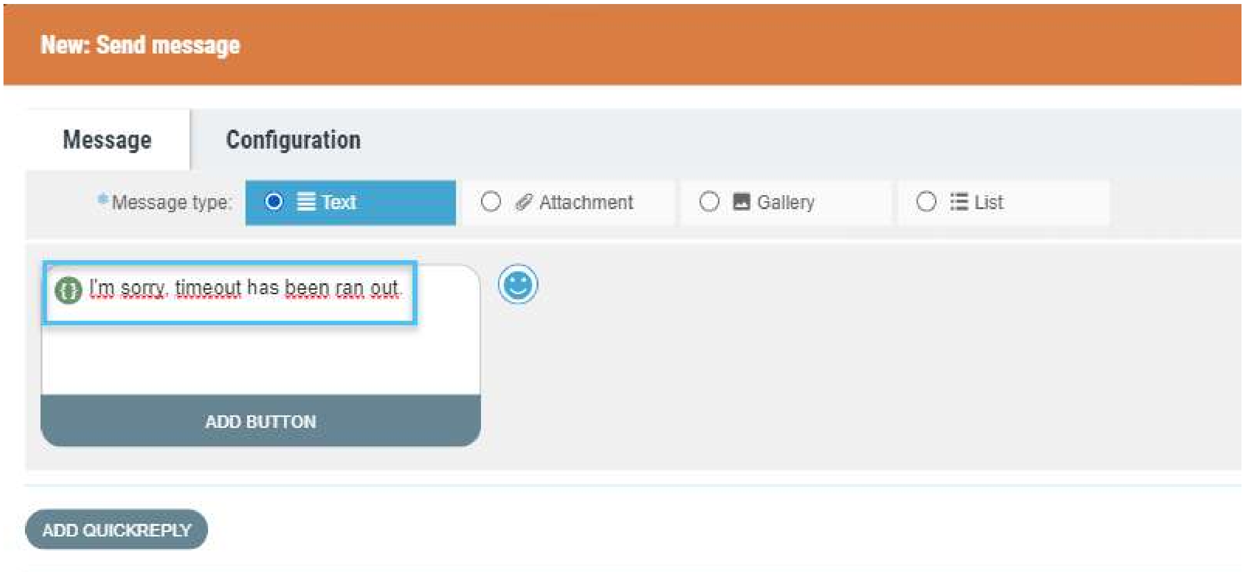
j. We add a transition between the **"Consult user"** and **"Return answer"** activities



In the transition window we indicate that the **"response_user.eventname"** variable is equal to **"NewChatMessage"** to identify that it is a response from the user.

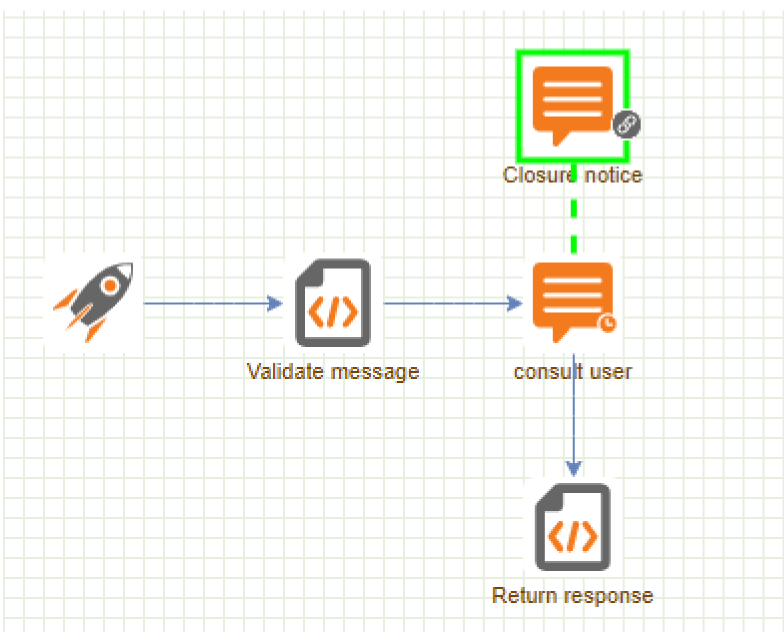


k. We add a new Send Message activity. This new message will be sent when the user is timed out.

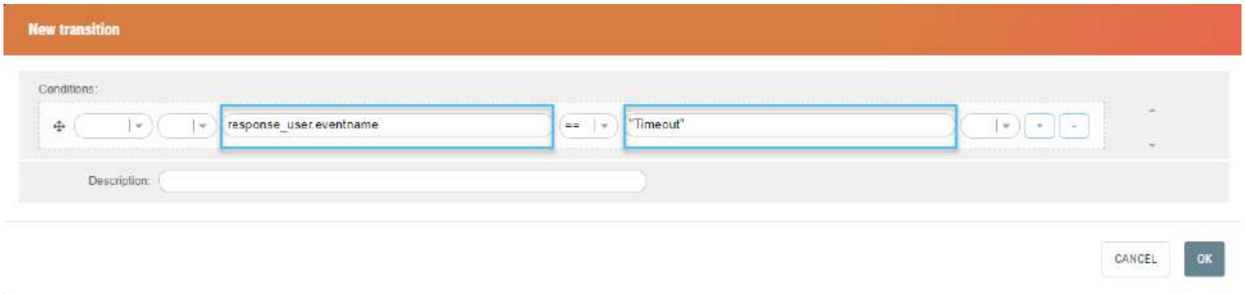


In the settings tab we add:

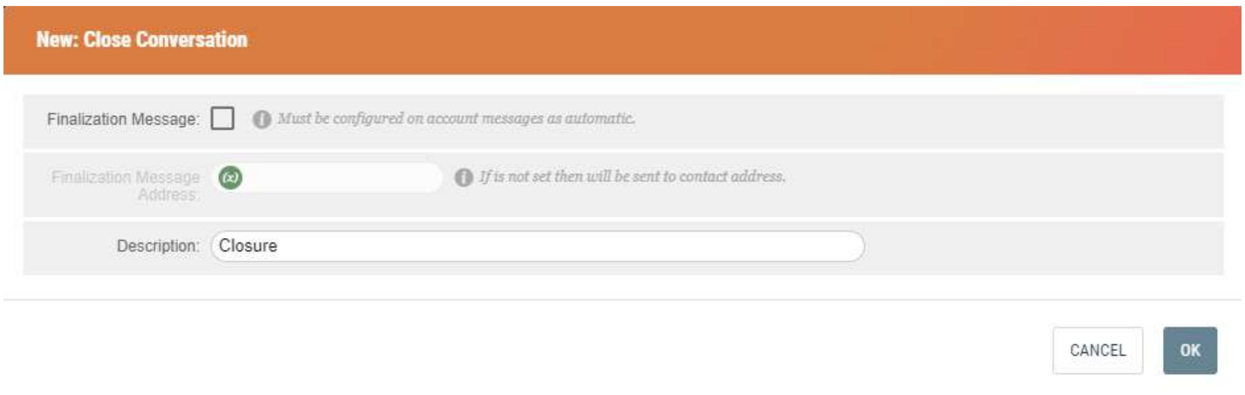
I. We link the **"Consult user"** and **"Notification of closure"** activities.



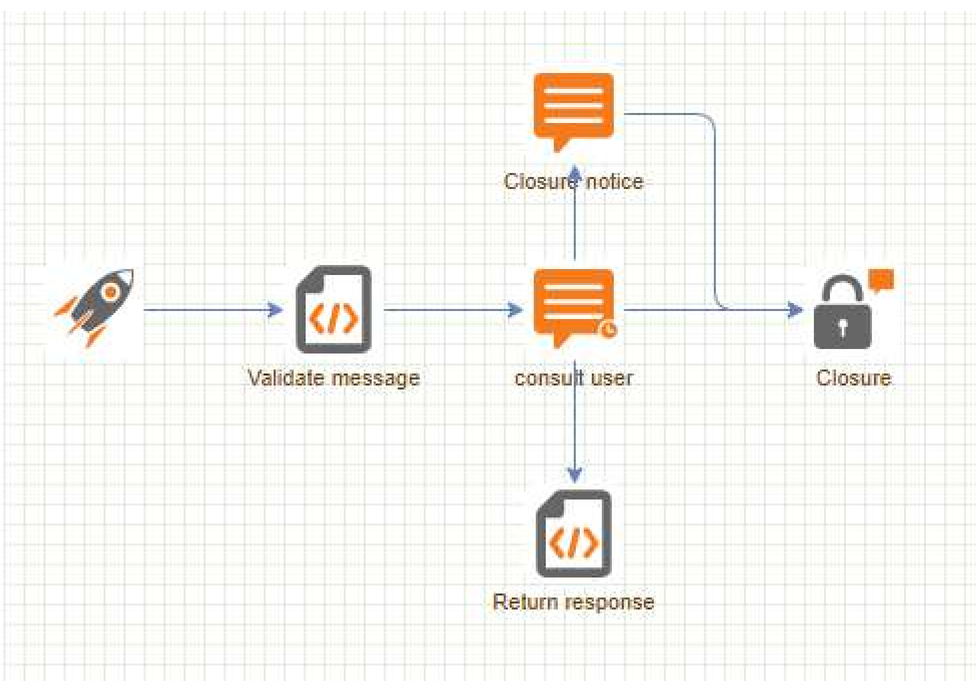
In the transition window we set the event for the variable in the previous activity as **"Timeout"**, to determine when the timeout is exceeded.



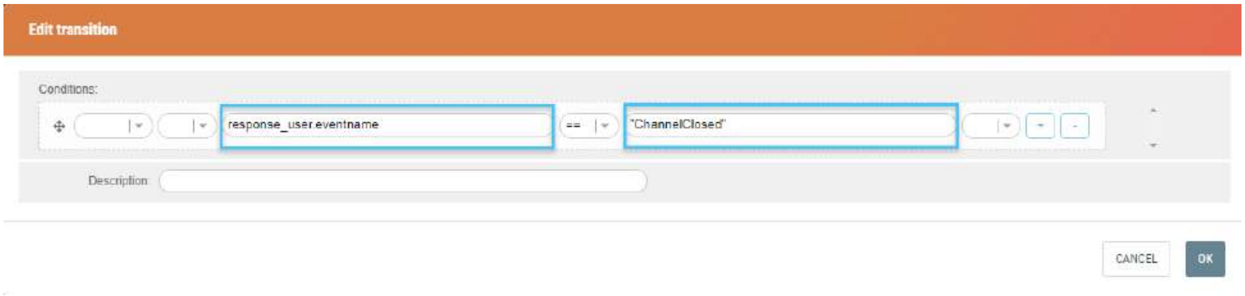
m. We add a new activity, **"Close Interaction"**, to end this state.



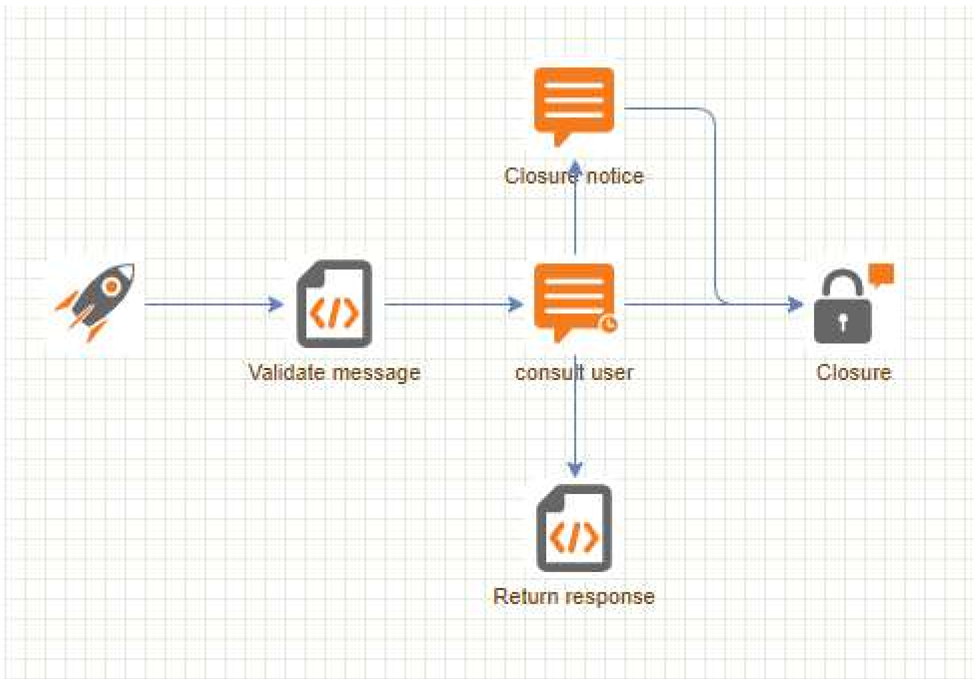
n. Lastly, we link the **"Consult user", "Notification of closure"** and **"Closure"** activities**.**



In the transition window we indicate that the event for the variable in the previous activity is **"ChannelClosed"** to signal that the user closed the chat.

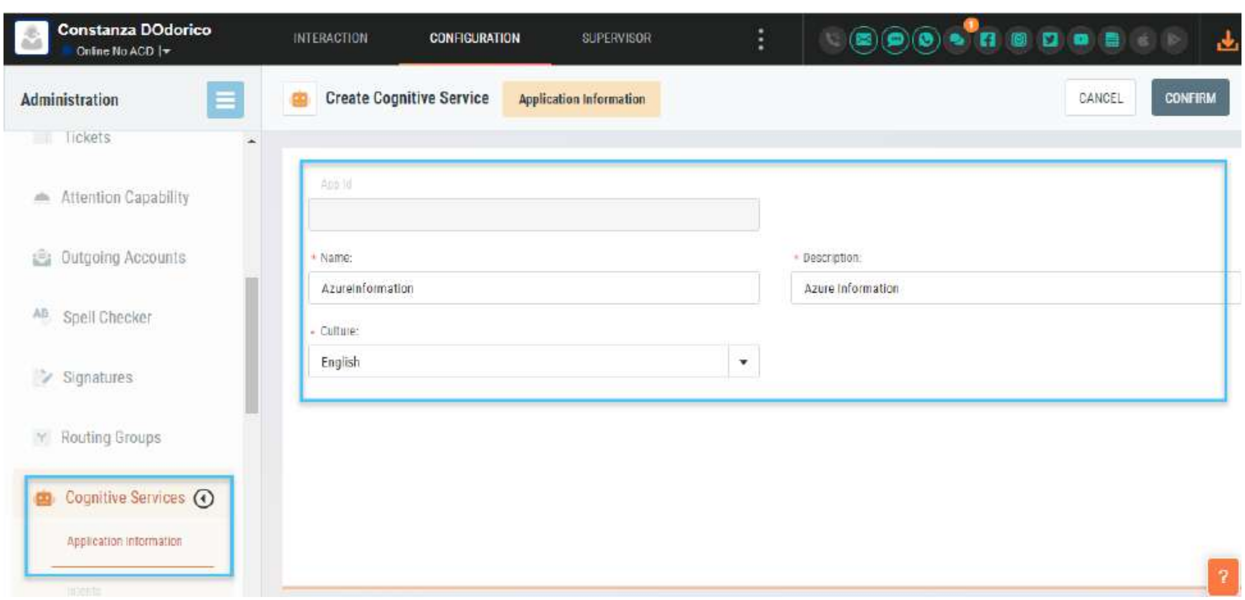


o. The design of the Welcome state will be then be as follows:

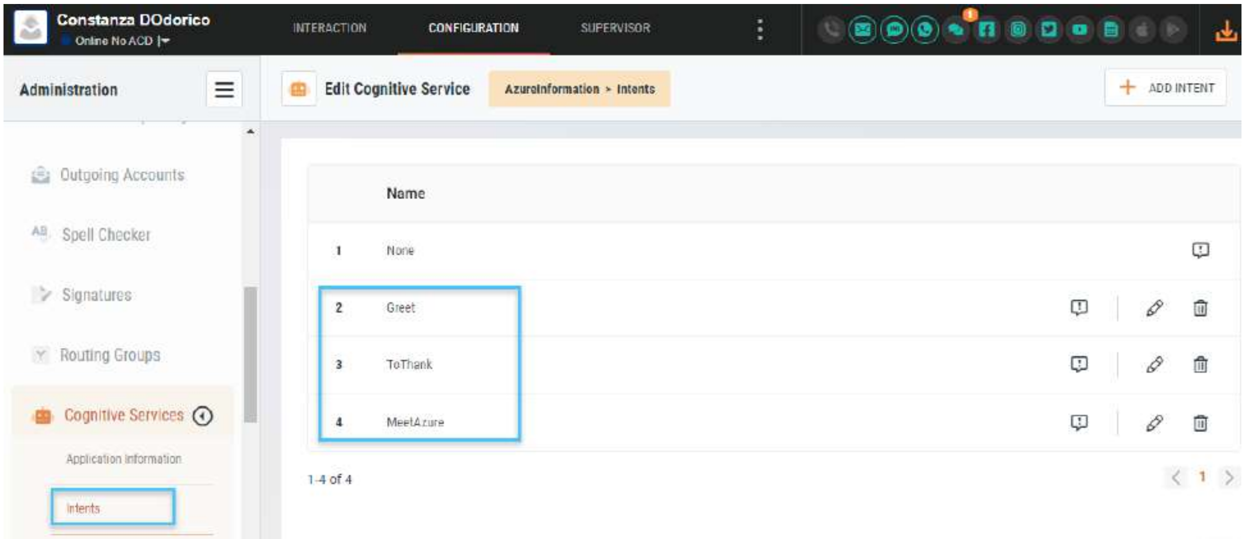


2. Creation of the cognitive model in LUIS

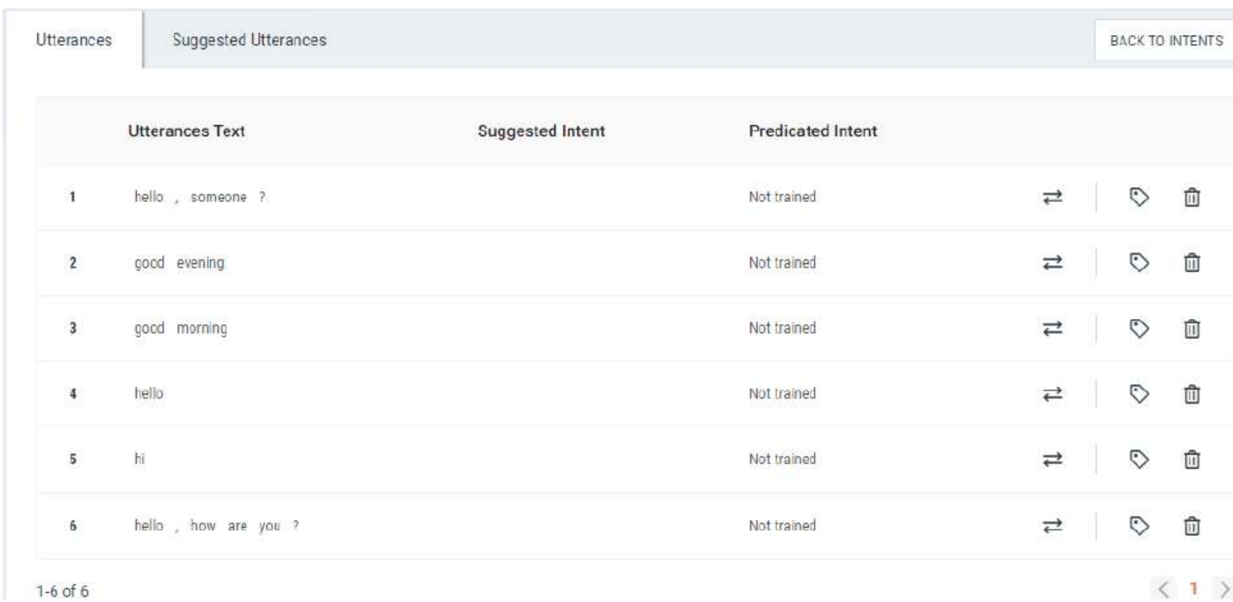
   a. We will create a new cognitive service with the name **"Azure Information"** and the description **"Information on Azure"** and **"Spanish"** for the culture.



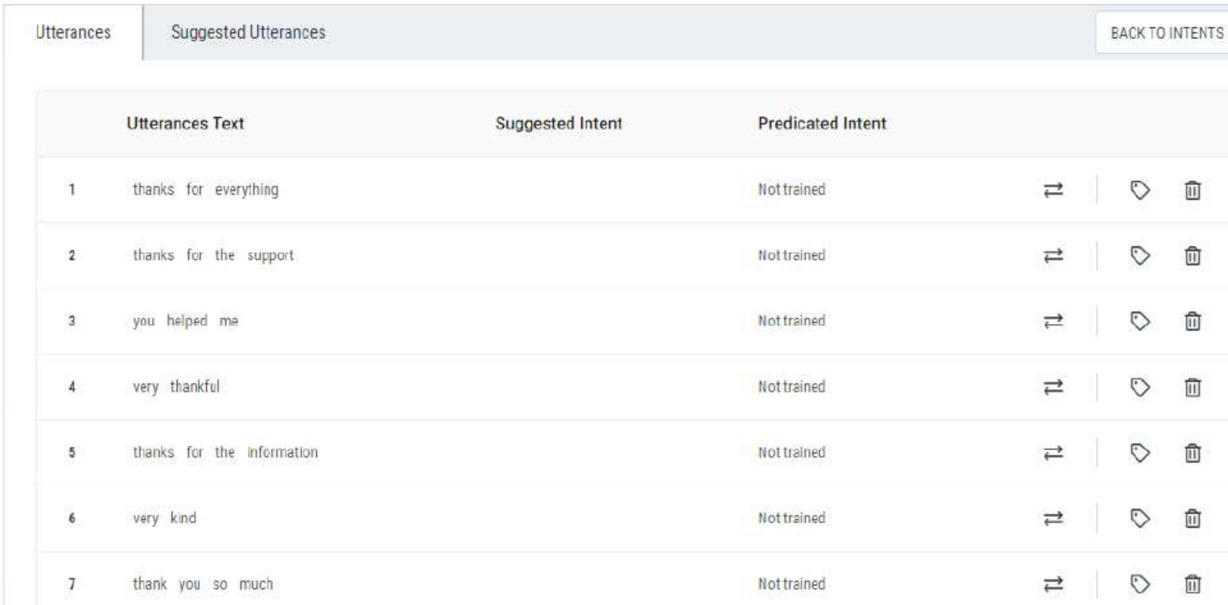
b. **Four intents were created: "Greet", "Thank", "MeetAzure" and the default one, "None"**



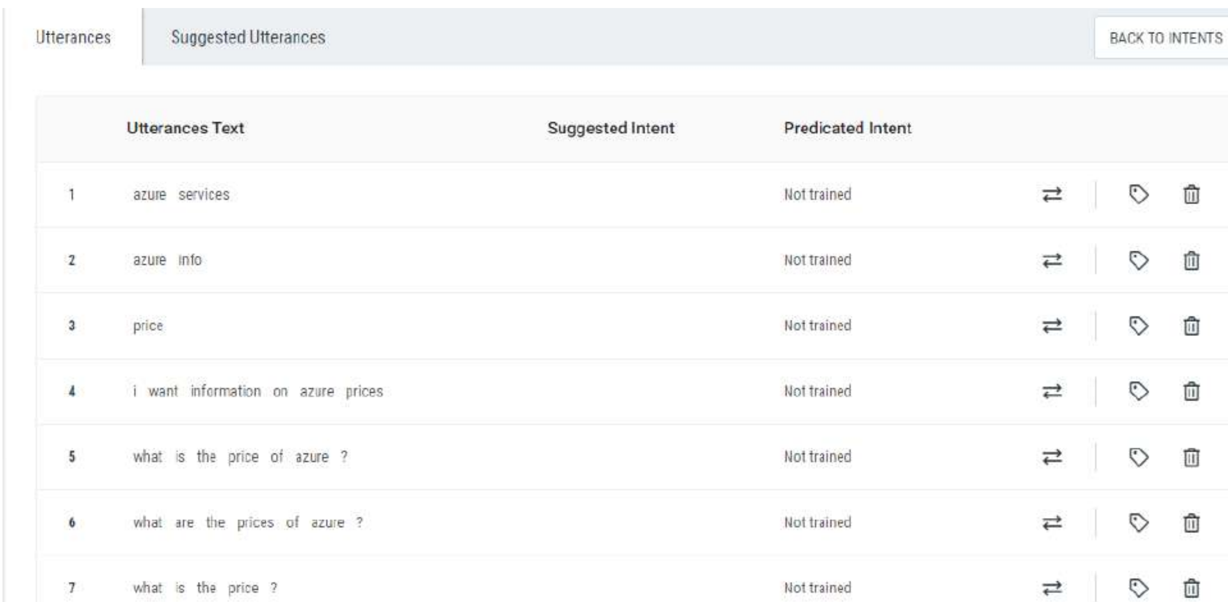
c. Phrases for the "Greet" intent.



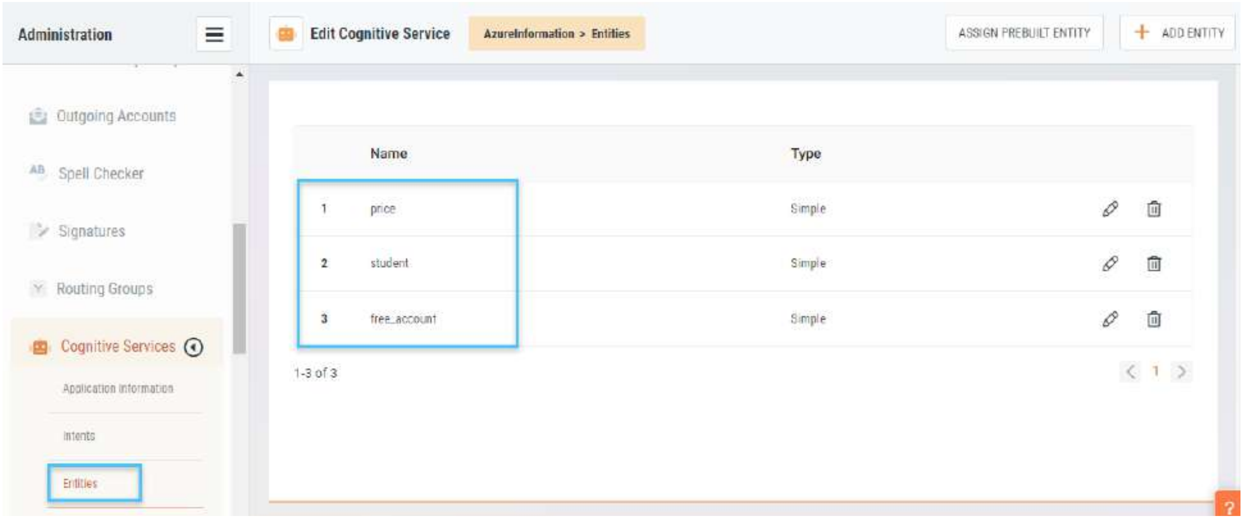
d. Phrase for the "Thank” intent



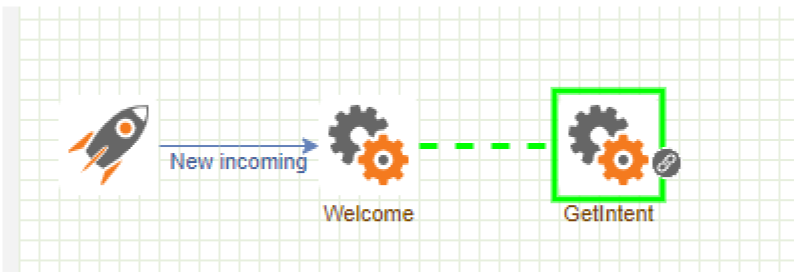
e. Phrase for the "MeetAzure" intent.



f. Entities



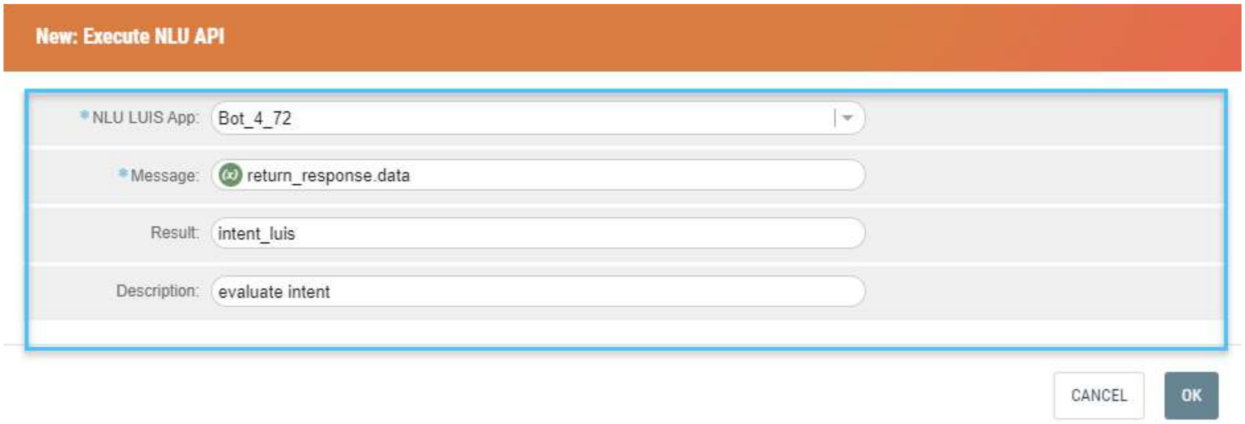
3. Creating the second state
   a. We will create a new state named **"GetIntent"** and link it to the Welcome state.



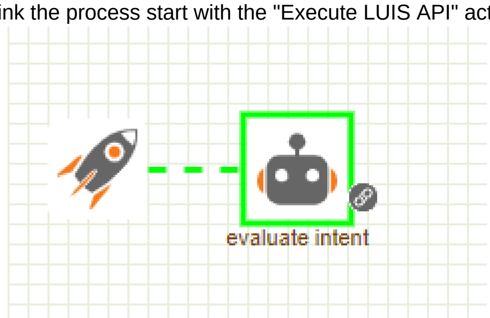
We set the event to **"No event"**

   b. Go to the "**GetIntent**" state and add a new **"Execute LUIS API"** activity to integrate the solution with the Cognitive Service.

Cognitive Services App: We select "**AzureInformation**" as our cognitive model.
Message: This is the variable that contains the user's query configured in the previous state, "**Welcome**", in the **"Return response"** activity.
Result: This is the name of the variable in which the result returned from the Cognitive Service will be stored.



c. Link the process start with the "Execute LUIS API" activity

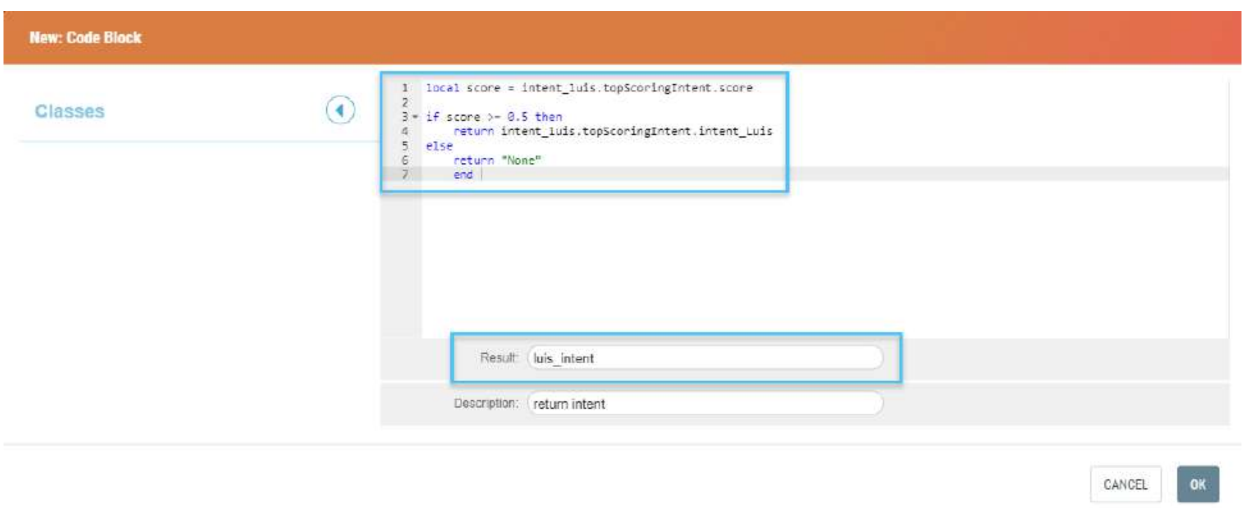


d. We add a new **"Code Block"** activity to capture the intents returned by the Cognitive Service.

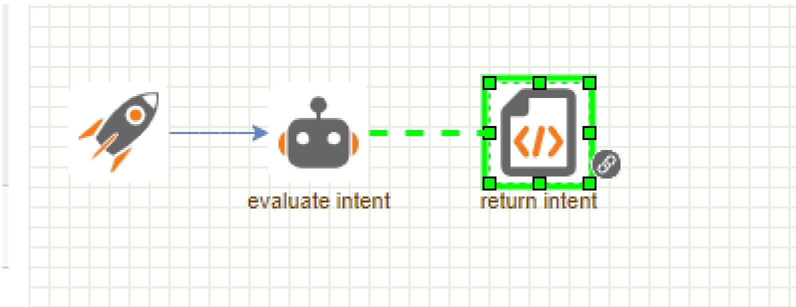
In the **Lua** code editor: We state a "**score**" local variable to capture the intent's confidence score provided by the Cognitive Service based on the user's inquiry.

Then we set the condition that the confidence level is equal to or greater than 50%. This is part of the recommendations, to set a conditional acceptance limit in order not to combine certain phrases that have some minor similarity with an intent. This improves cognitive model training and the appropriateness of the inputs for it.

If the level of confidence complies with the 50% acceptance limit, we return the intent provided by the Cognitive Service; if not, we consider that it does not understand or that the intent is "**None**". The result will be stored in the **"luis_intent"** Result field at the bottom of the Lua code editor.

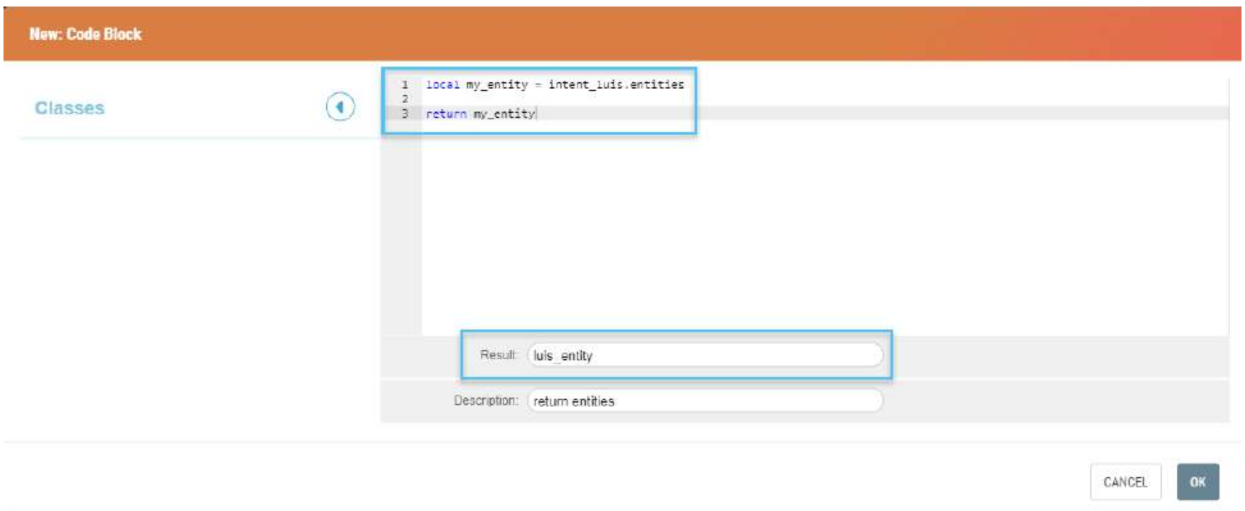


e. We link the last two activities.

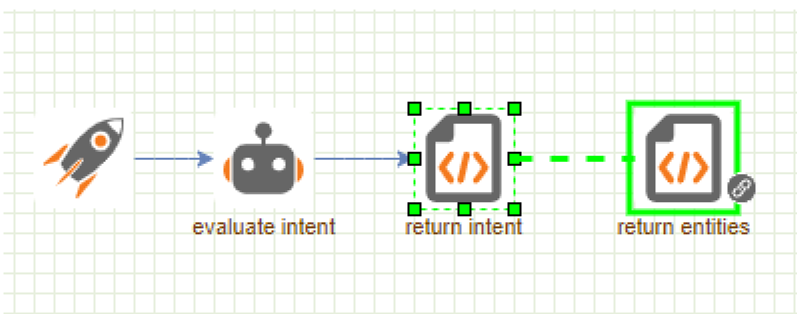


f. We add a new **"Code Block"** activity to capture the entities returned by the Cognitive Service. Remember that chatbot responses will depend on the entities that are captured in the user's inquiries

In the Lua code editor, we add the "**my_entity**" variable to capture the entities returned by the Cognitive Service that are hosted in **"intent_luis.entities"**. Lastly, we return the entities with the "**luis_entity"** Result field.



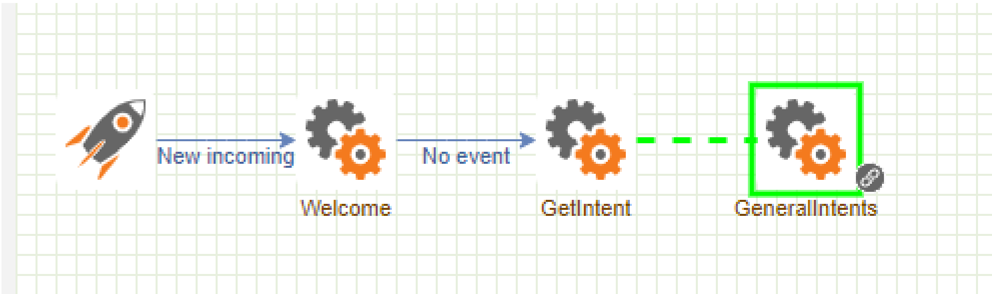
g. We link the last two activities.



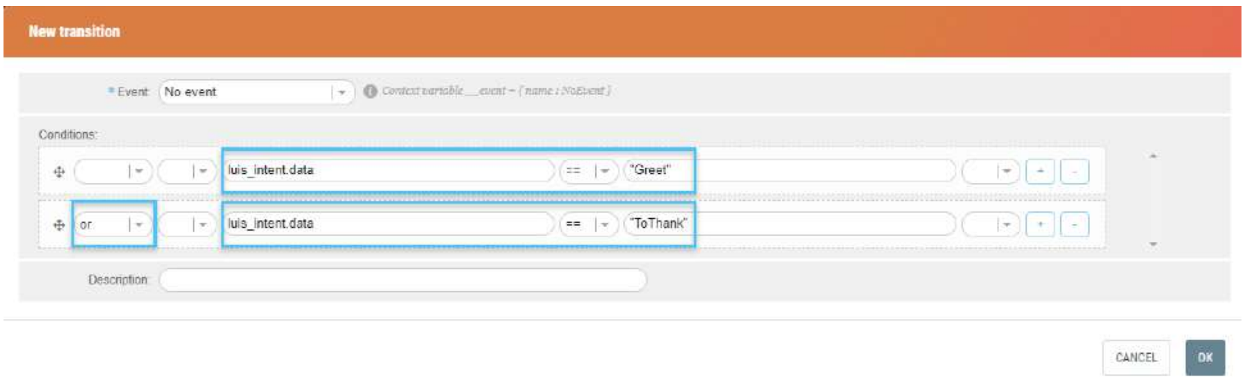
4. Creating the third state

a. We create a new state called "GeneralIntents" where we will manage the **"Greet"** and **"Thank"** intents.

b. We link the "ObtainInformation" and "GeneralIntents" states.



c. In the transition window, we set the intent returned by the Cognitive Service to **"Greet"** or **"Thank"**.

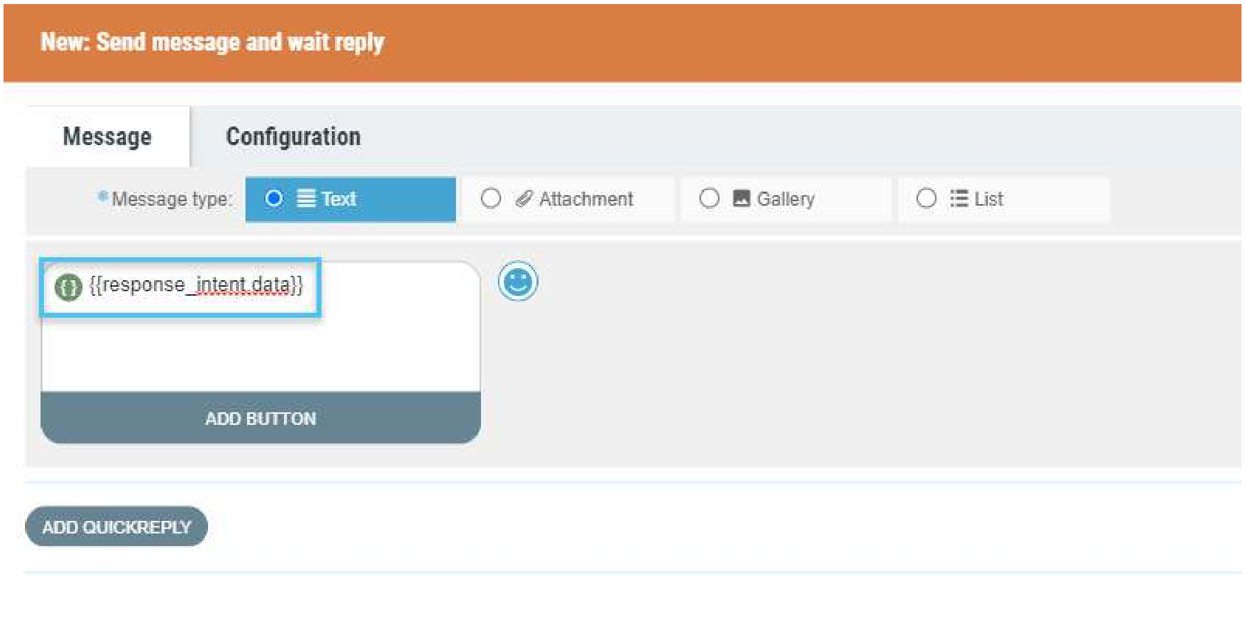


d. We go to the “GeneralIntents” state and add a new “Code Block” activity in order to distribute the responses according to the intent.

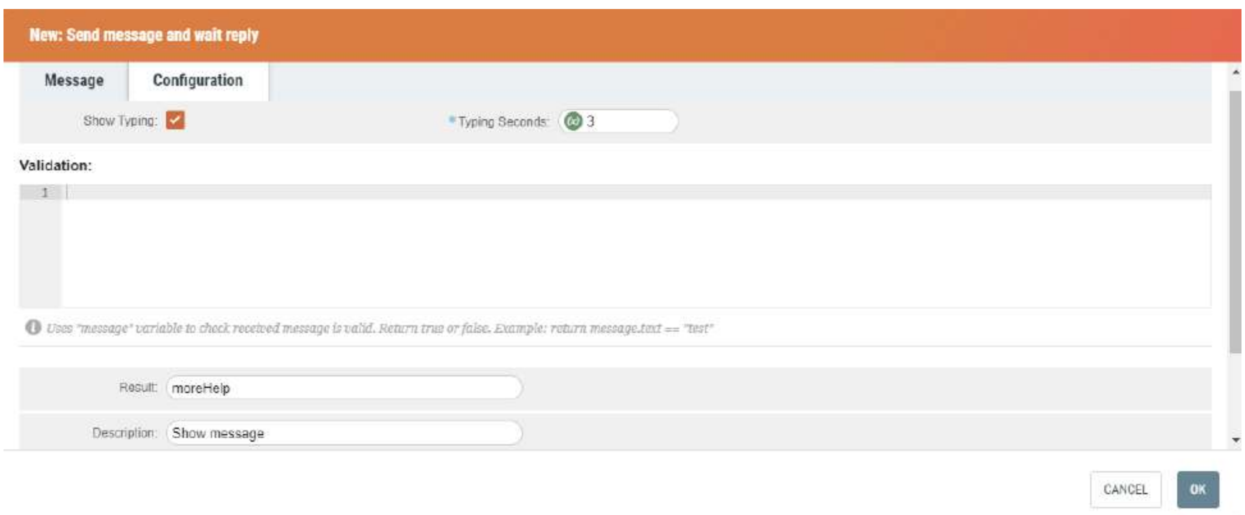
In a local variable we capture the intent and condition response messages accordingly, returning the message with the "**response_ intent**" Result field at the bottom of the Lua code editor

e. We add a new **"Send Message and Wait"** activity to show the response to the user and to wait for it.

In the "MESSAGE - Text" option we add the message saved in the "response_intent" field together with ".data”

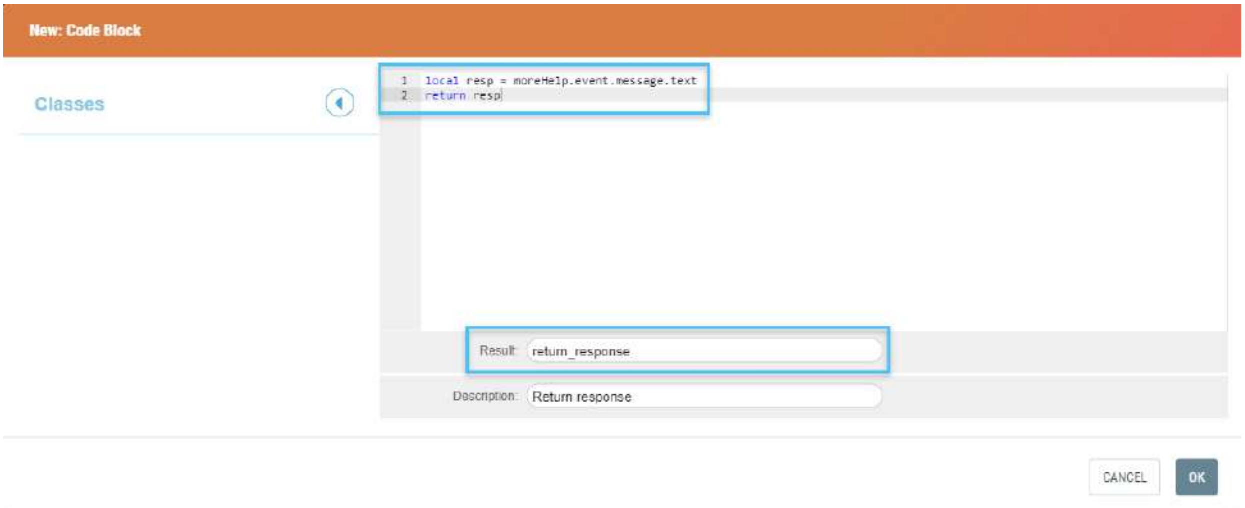


In the "CONFIGURATION" option, we check "Show typing" and add a 60-second timeout to the result that the user has to provide. This will be stored in the "moreHelp" field

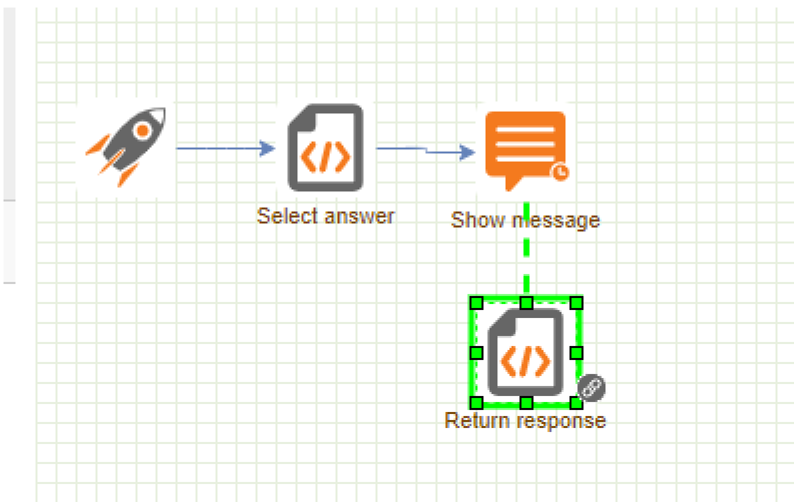


f. We add a new “Code Block” activity to capture and return the user's response.

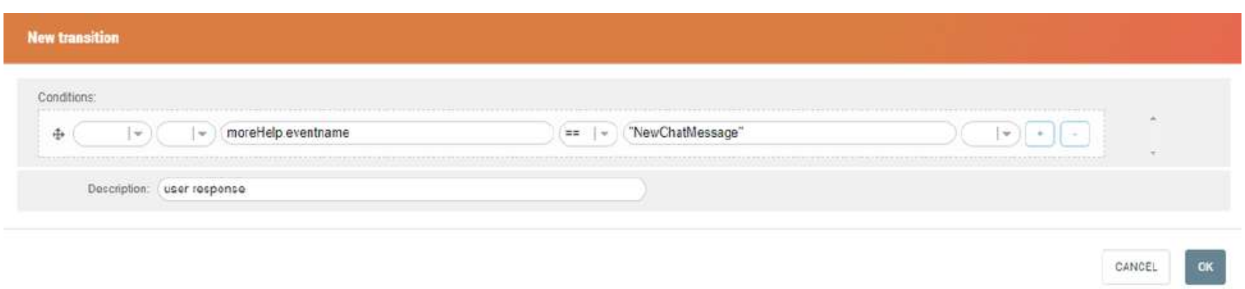
In the Lua code editor, in the **“resp”** local variable we capture the user's response and return the **“return_response”** Result field.



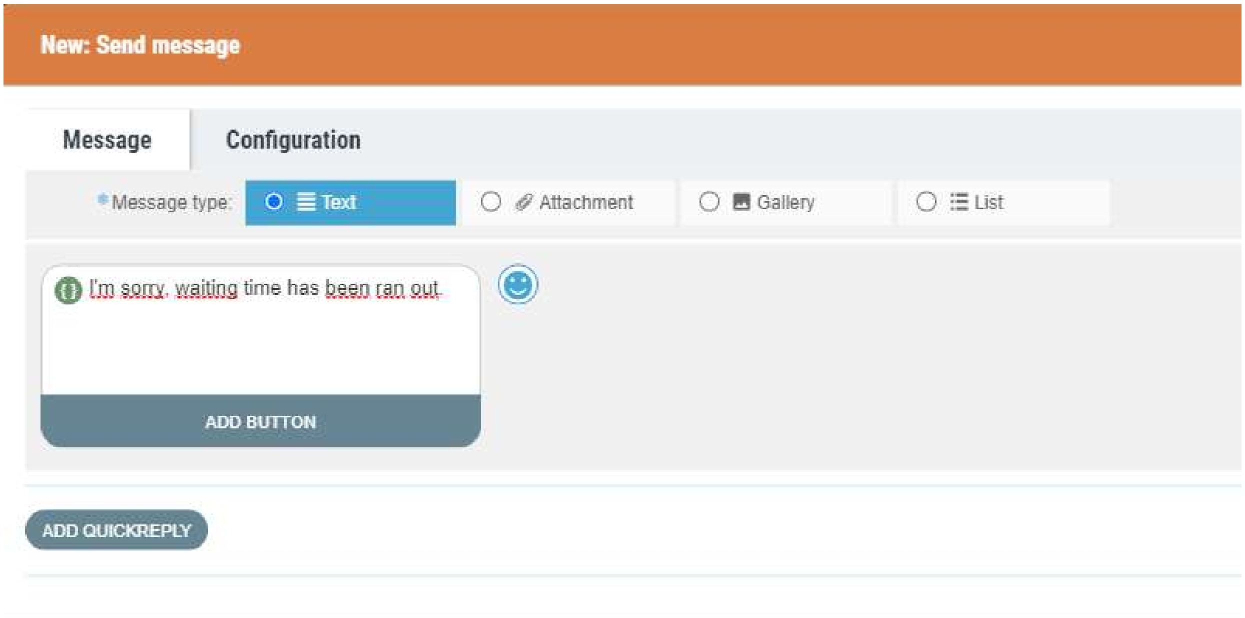
g. We link the **"Show message"** and **"Return response"** activities.



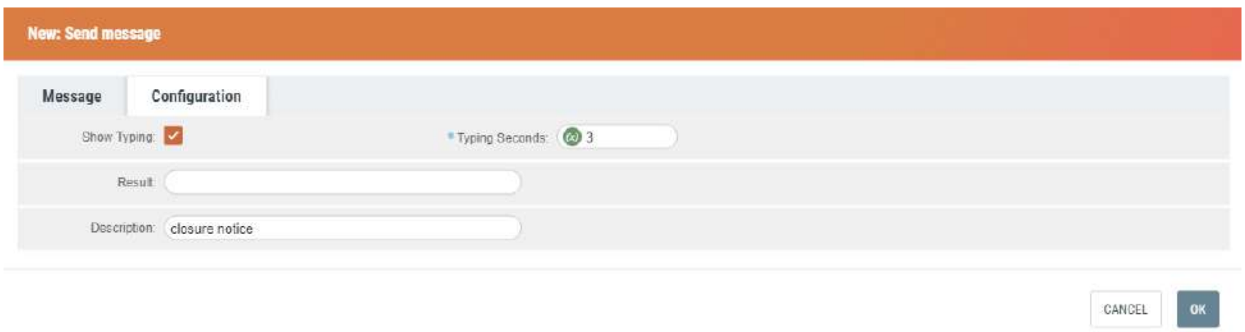
We also set the event of the **"moreHelp"** variable in the **"Show Message"** activity as **"NewChatMessage"** to indicate that it is a message from the user



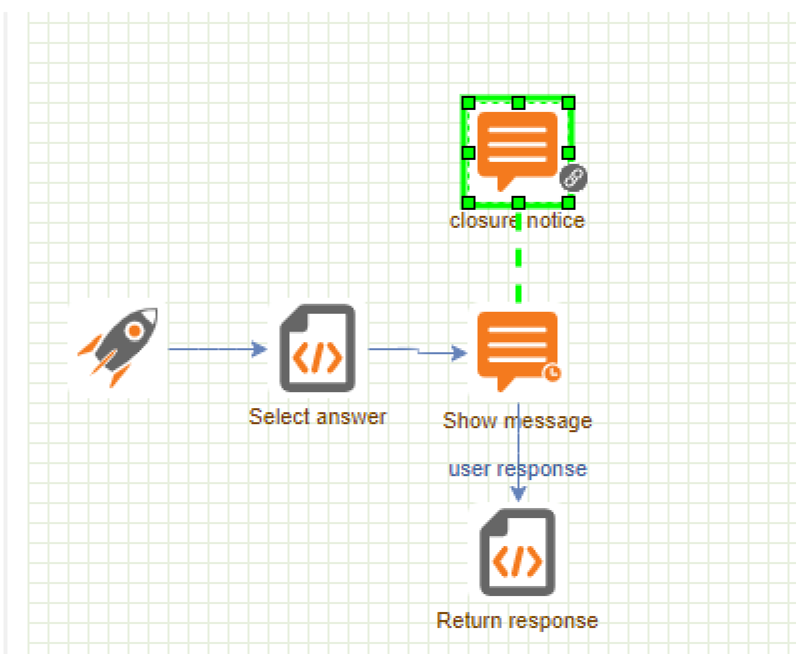
h. We add a new **"Send Message"** activity to show a message to the user notifying them that they have been timed out.



In the "CONFIGURATION" option we add a description that will be shown in the diagram.

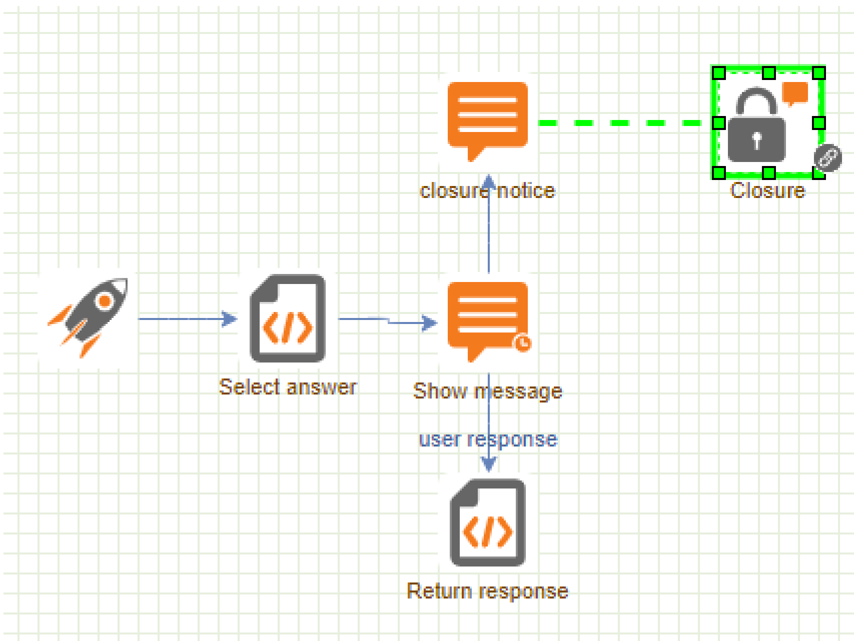


i. We link the two activities, **"Show Message"** and **"Notification of Closure"**.

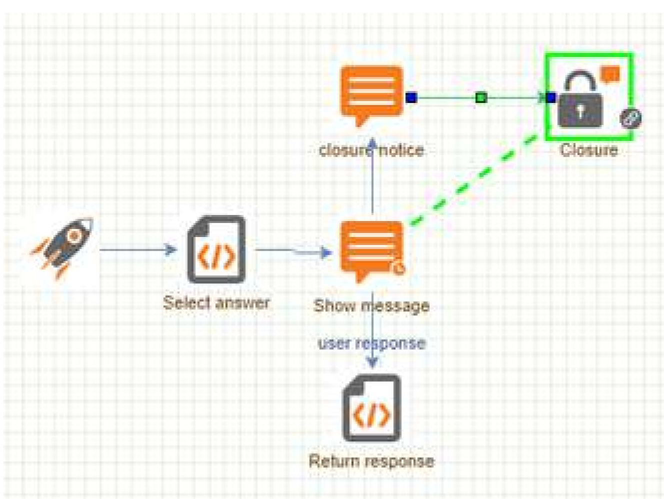


In the transition window we set the event for the **"MoreHelp"** variable as **"Timeout".**

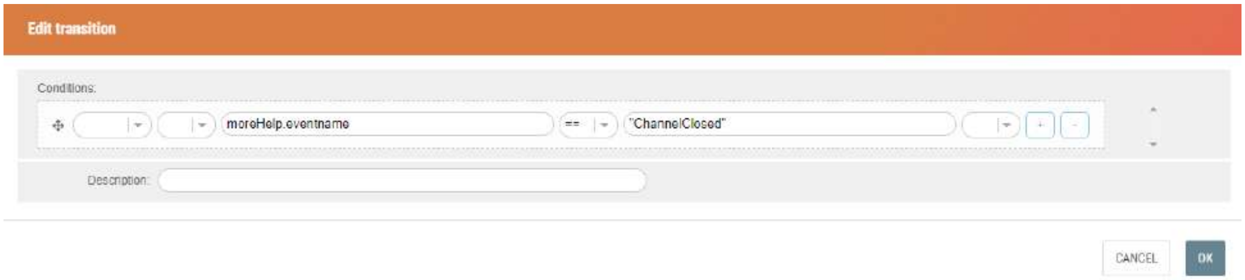
j. We add a new “Close Interaction” activity to end the conversation when the timeout is exceeded or the user closes the chat.



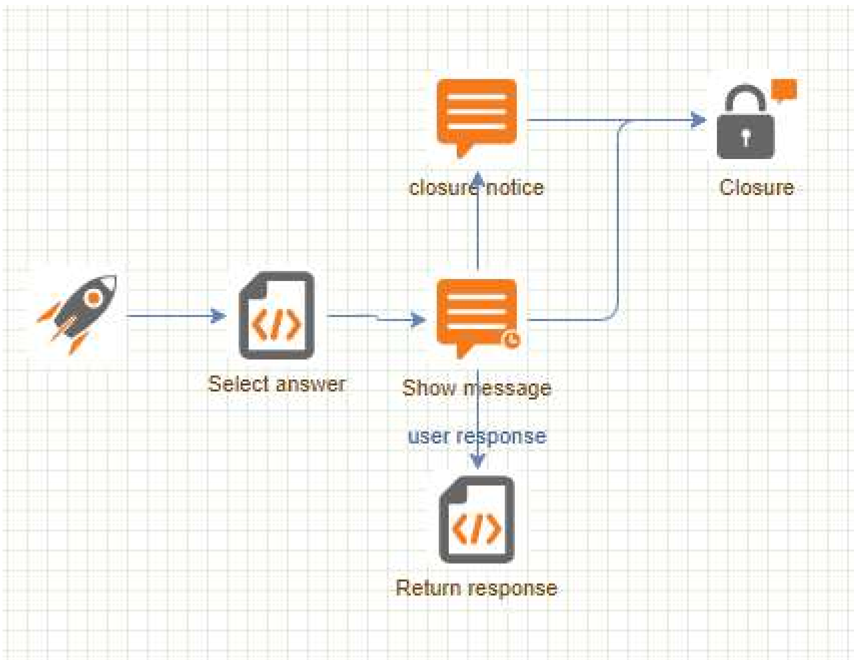
k. We link the "Show Message" and "Close" activities to end when the user closes the chat.



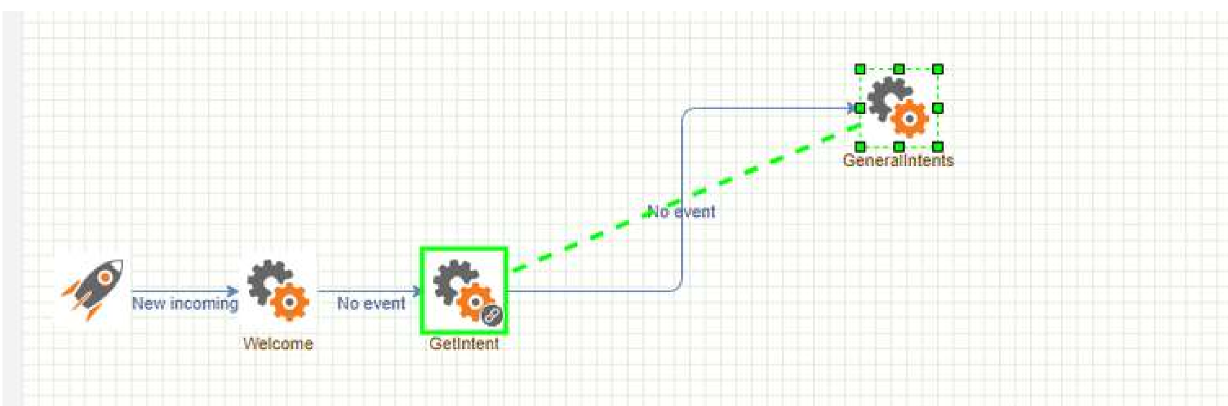
In the transition window we set the type of event for the **"moreHelp"** variable as **"ChannelClosed"**



l. The "GeneralIntents" state will end up looking like this:



m. We inversely link the "GeneralIntents" and "GetIntent" states because the "GeneralIntents" state returns an inquiry from the user. This we then send to the LUIS Cognitive Service for assessment and for it to give us a new intent as a result.

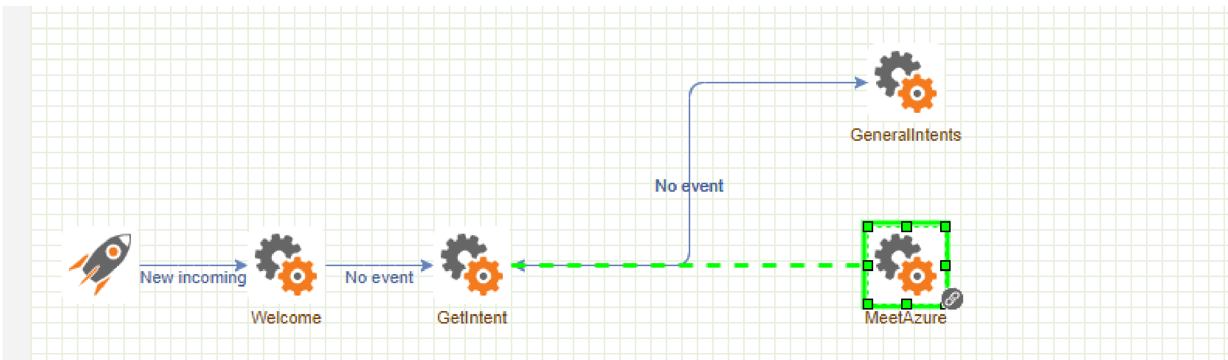


In the transition window we set the Event field to **"No event".**

Creating the fourth state

a. We add a new state called "**MeetAzure**"; here we will handle the information from the Azure cloud.

b. We link the **"GetIntent"** and **"MeetAzure"** states.



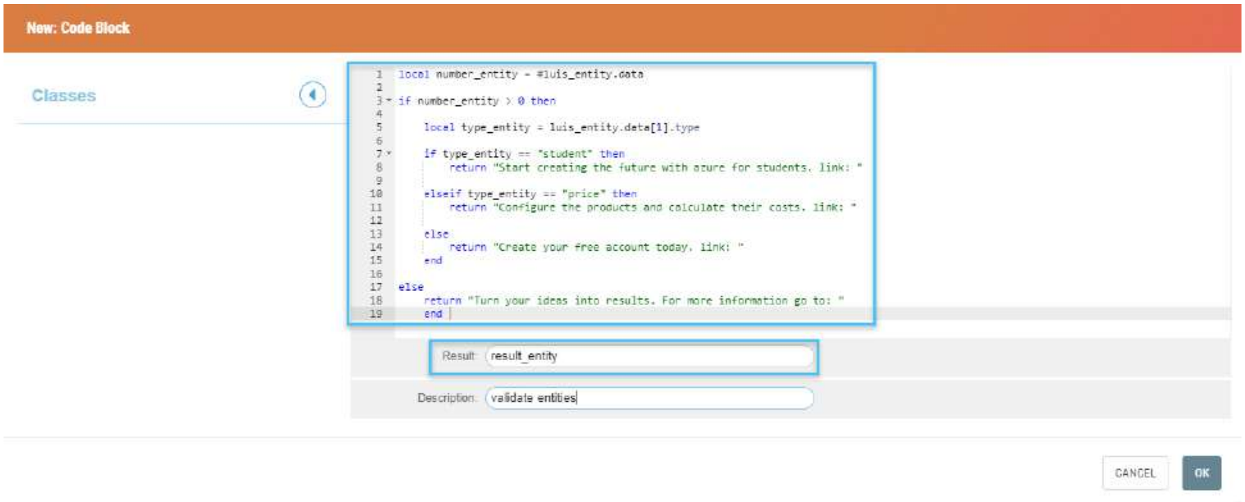
We set the event to **"No event"** and the name of the intent returned is **"MeetAzure".**

c. In the **"MeetAzure"** state, we add a new **"Code Block"** activity to handle the responses.

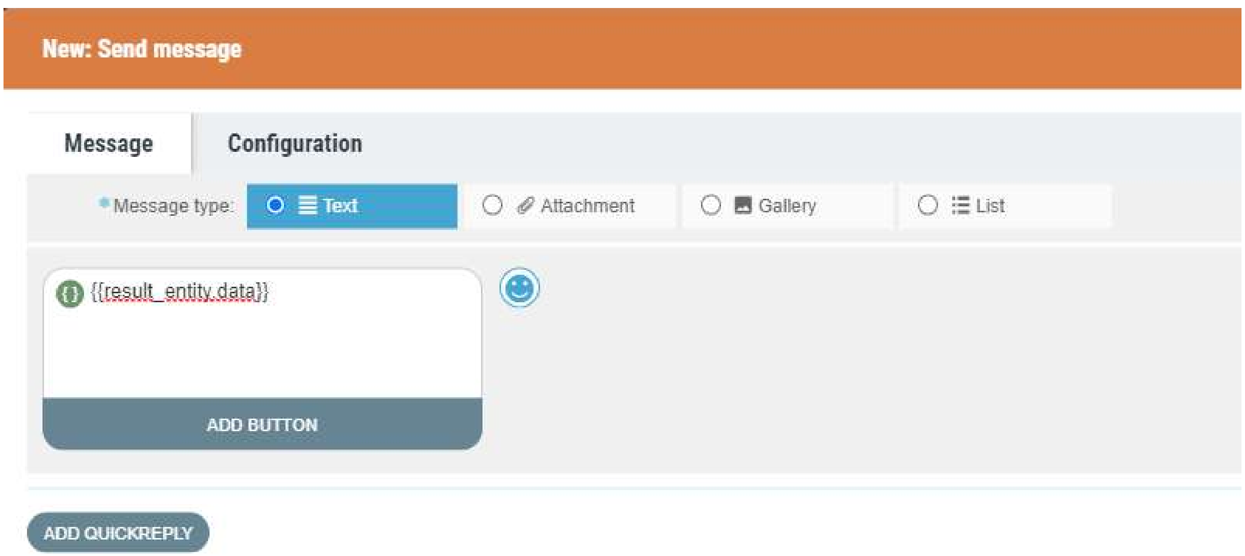
In the **Lua** code block:

- We add a **"number_entity"** local variable to obtain the number of entities returned by the LUIS Cognitive Service.
- First we determine whether there are any entities and then classify responses according to the type of entity. There are various answers which depend on the user's inquiry; if there are no entities, we display the general information about the Azure cloud.
- We store the message in the **"result_entity"** and add the description **"Validate Entities"**

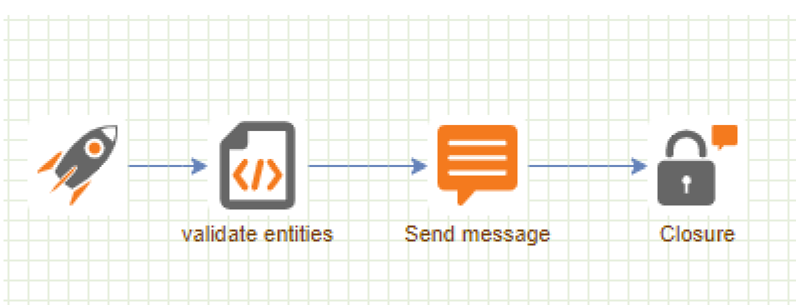
Remember that entities allow you to capture those important words and change the context of the conversation.



d. We add a new **"Send Message"** activity
In the option "MESSAGE - Text", we add the variable "result_entity" that stores the message to be displayed.



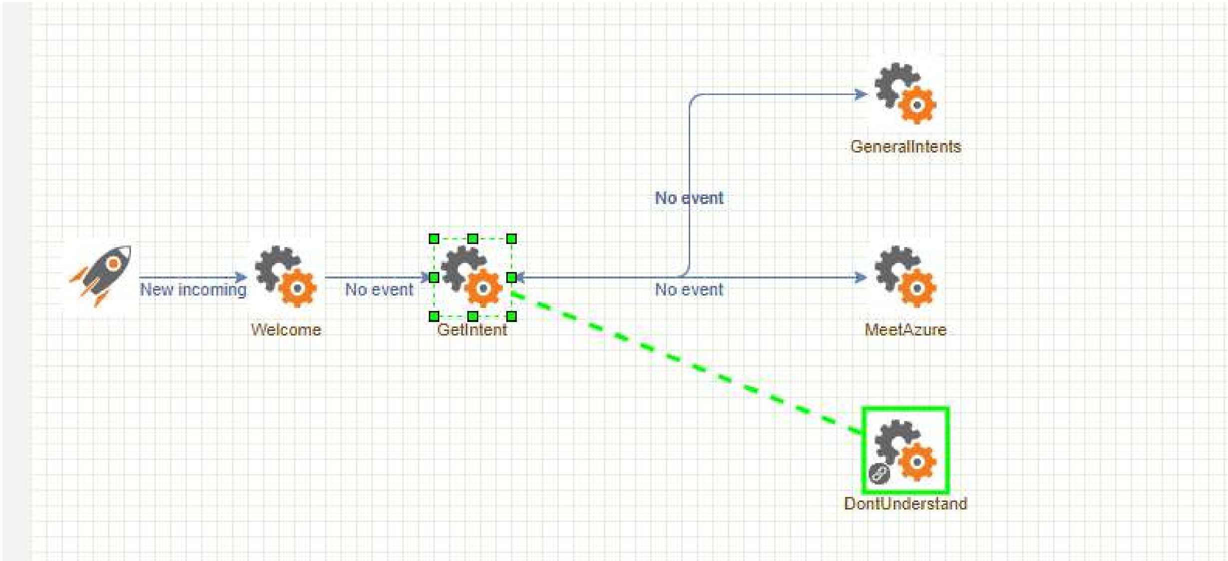
e. We add a new **"Close Interaction"** activity to end the conversation once the answer is shown to the user.
f. The **“MeetAzure”** state will end up looking like this:



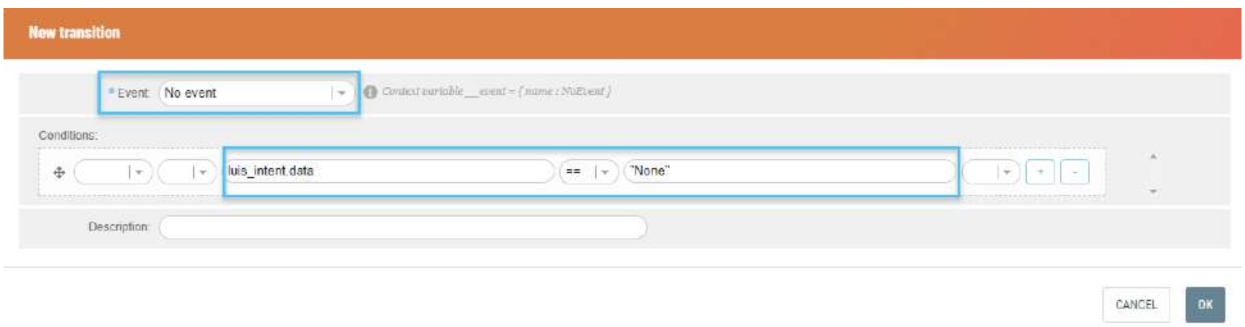
5. Creating the fifth state

a. We add a new state called **"DoesNotUnderstand"** to handle the **"None"** intent which refers to the fact that the Cognitive Service could not identify an intent conditioned by an acceptance limit of at least 50%.

b. We link the **"GetIntent"** and **"IDoNotUnderstand"** states.

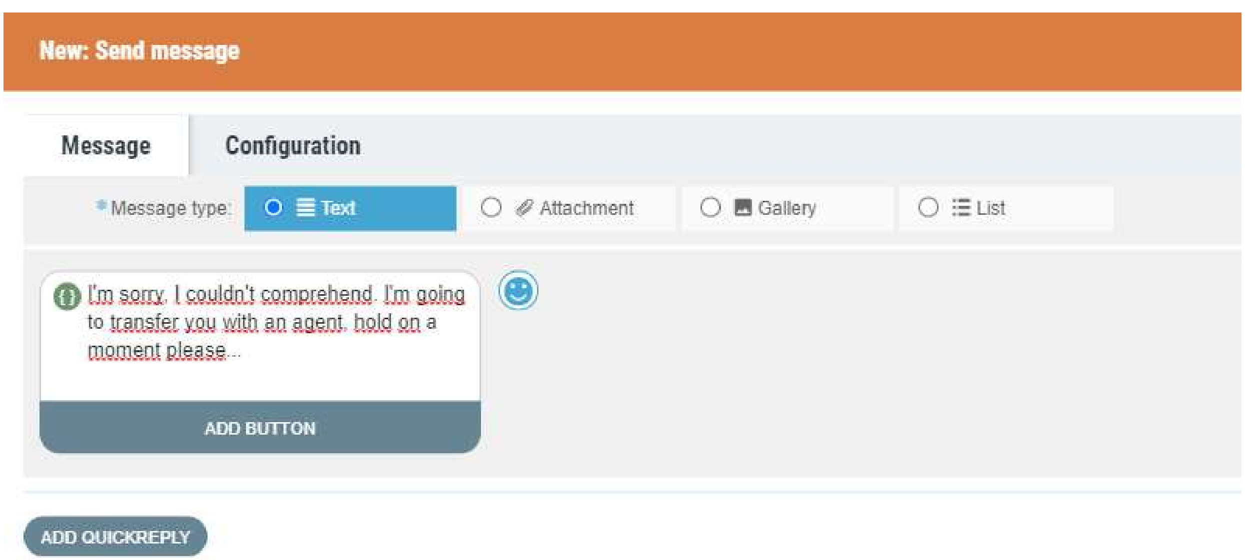


We set the event to **"No event"** and the intent of the **"luis_intent"** variable to **"None".**

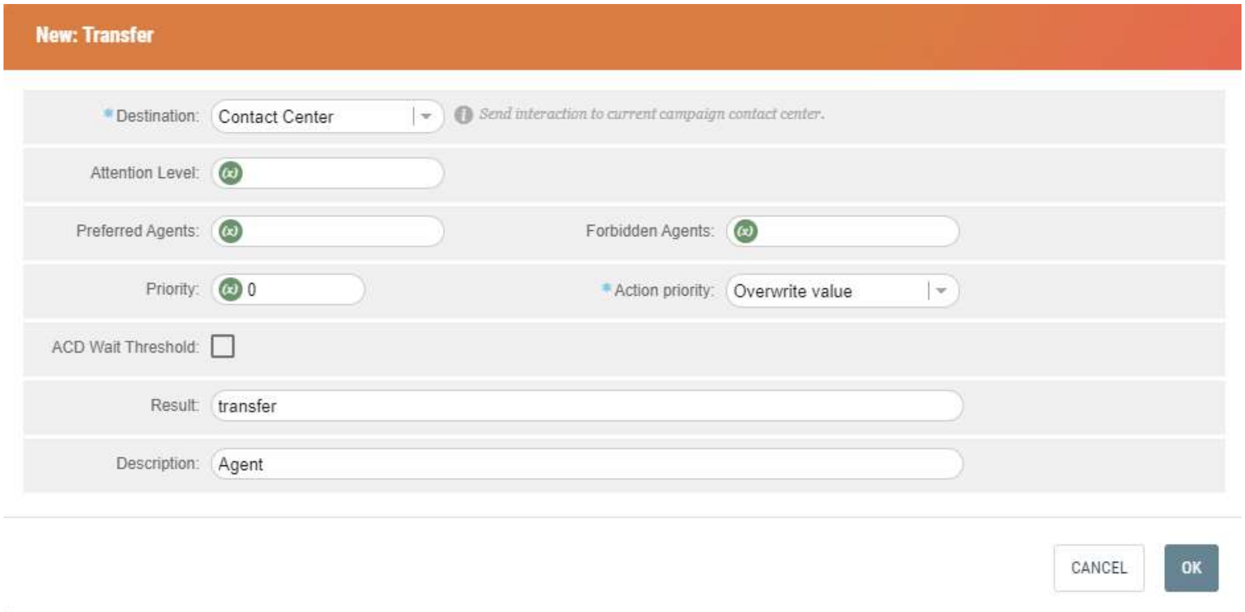


c. We go to the **"IDoNotUnderstand"** state and add a new **"Send Message"** activity.

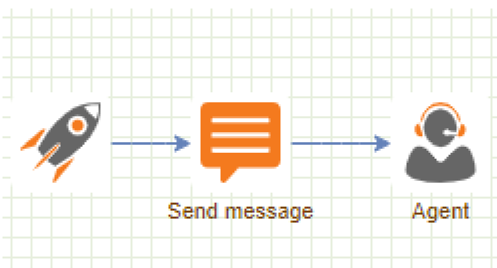
We add a message stating that the chatbot does not understand and that it will transfer the customer to an agent.



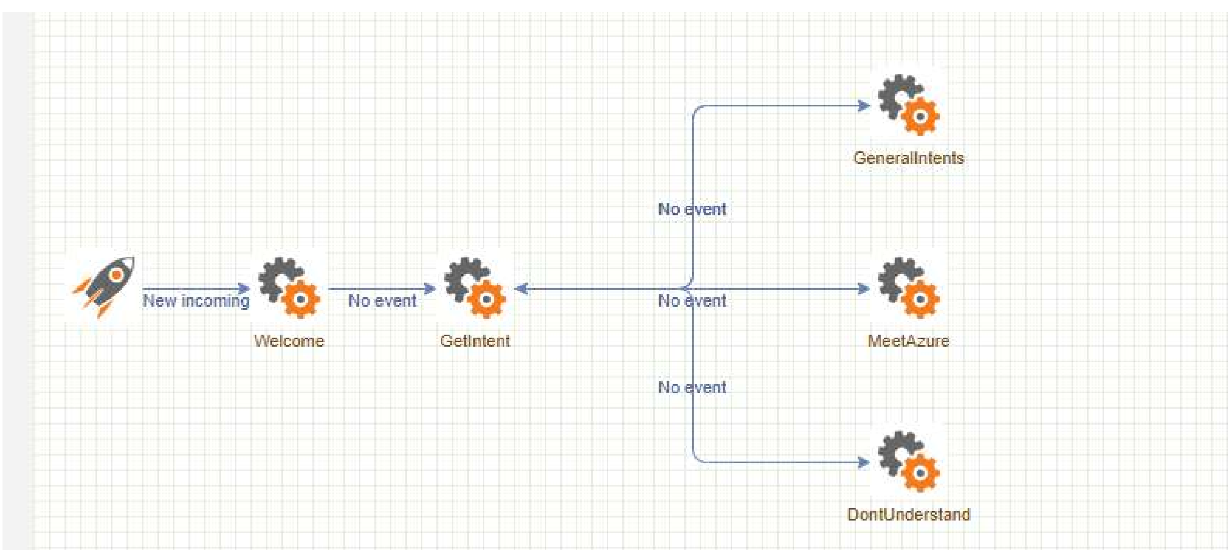
d. We add a new **"Transfer"** activity to connect with an agent.



e. The state will look as follows::

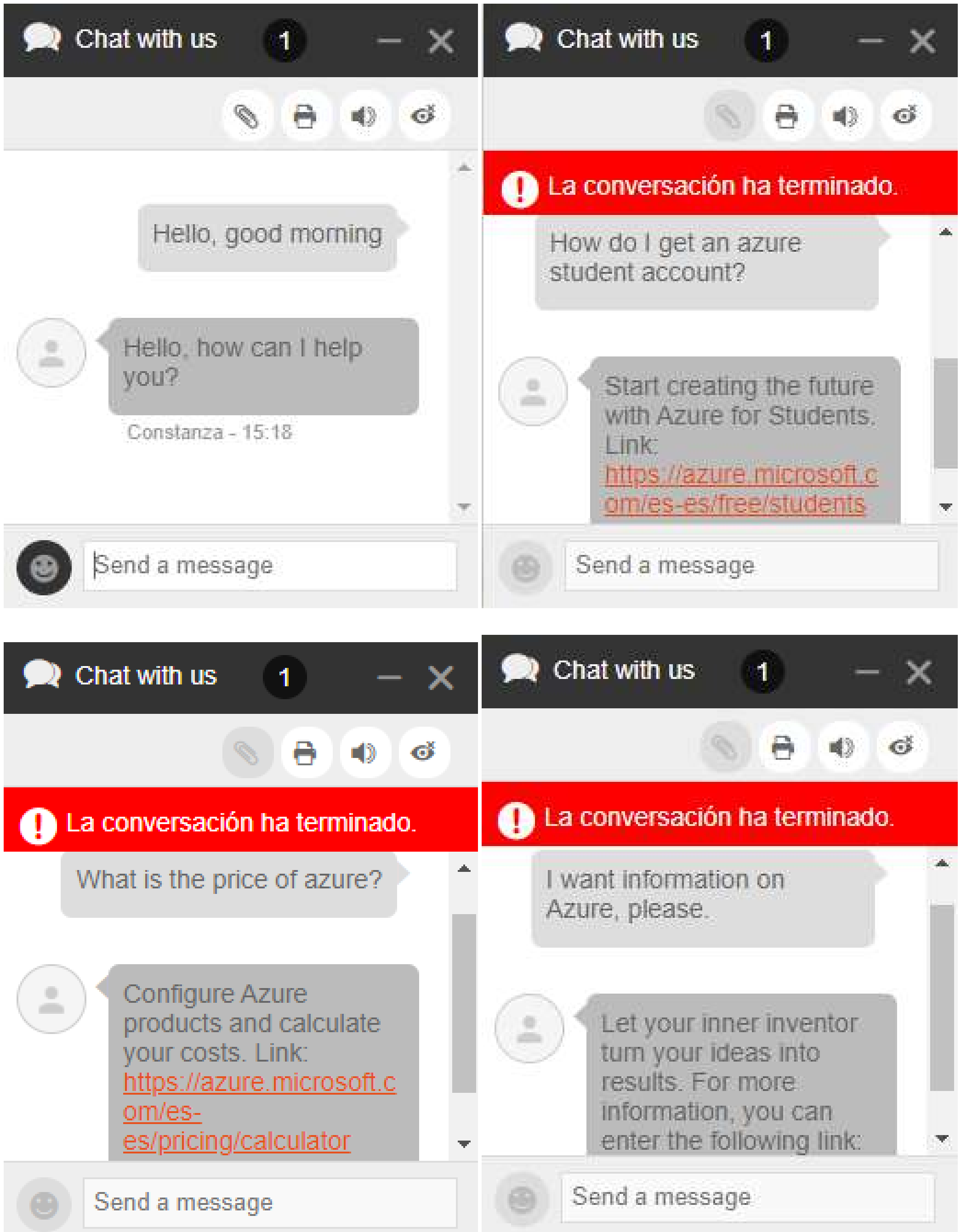


f. Our design for the entire solution will look like this:



6. Results

Chat captures:



Administration of the Outbound Engine

Search

- What is the Outbound Engine?
- How to access the Outbound Engine
- Outbound Processes
- Importations
- Importation Formats

- Contacts
- Exportations
- Exportations layouts

What is the Outbound Engine?

The Outbound Engine service is responsible for establishing interactions with contacts.

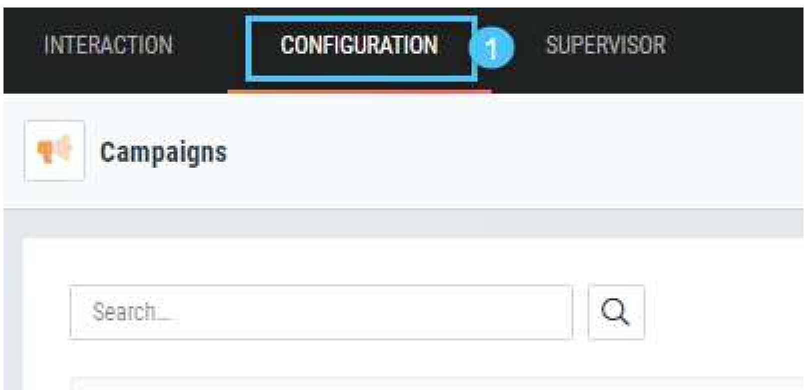
The administrator has the option to configure lists of contacts to obtain a segmentation. The service chooses the required lists of contacts according to the previously established directives, and communicates with contacts using a specific service.

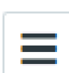
Related Articles

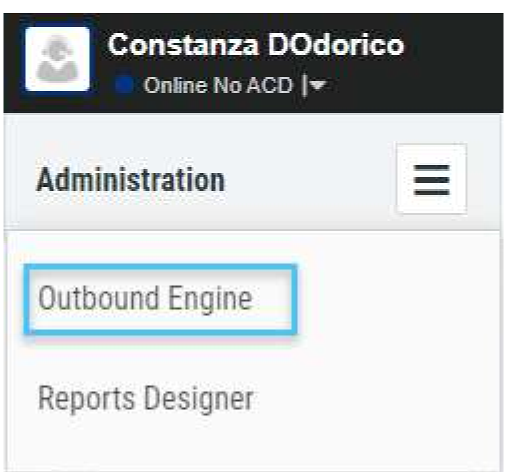
- How to layout an Exportation
- How to create an Importation
- How to set up dialing by percentage of batch
- How to recycle Batches of Contacts
- How to create Contacting Rules

How to access the Outbound Engine

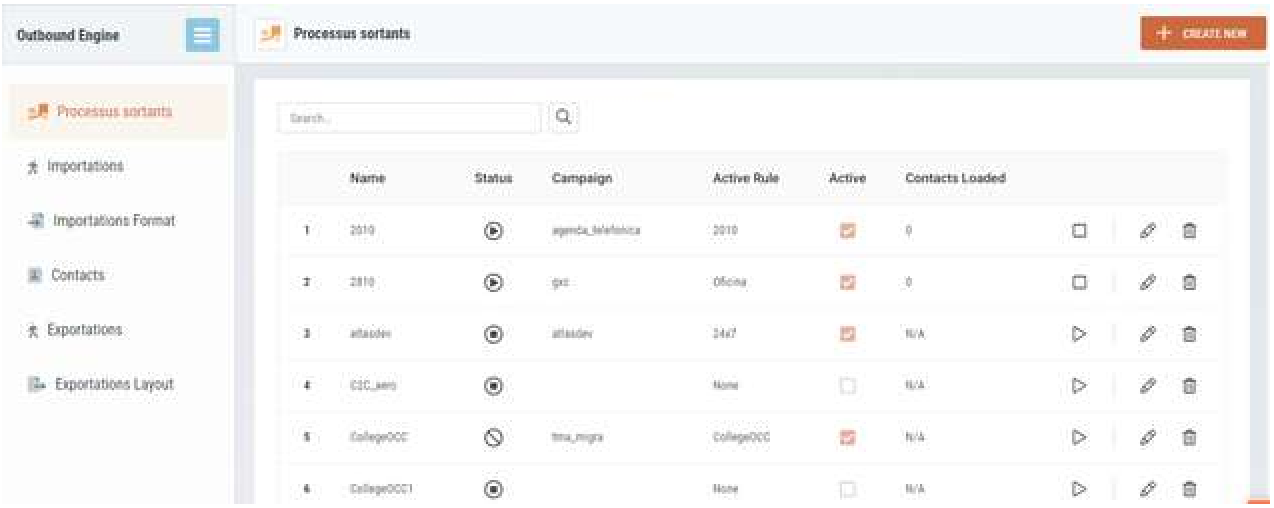
1. Go to the Configuration section of the OCC.



2. On the menu  from the side bar, select 'Outbound Engine'.



3. Once in the section, we will see a new sidebar with its menu.



Related Articles

- How to layout an Exportation
- How to create an Importation
- How to set up dialing by percentage of batch
- How to recycle Batches of Contacts
- How to create Contacting Rules

Outbound Processes

Search

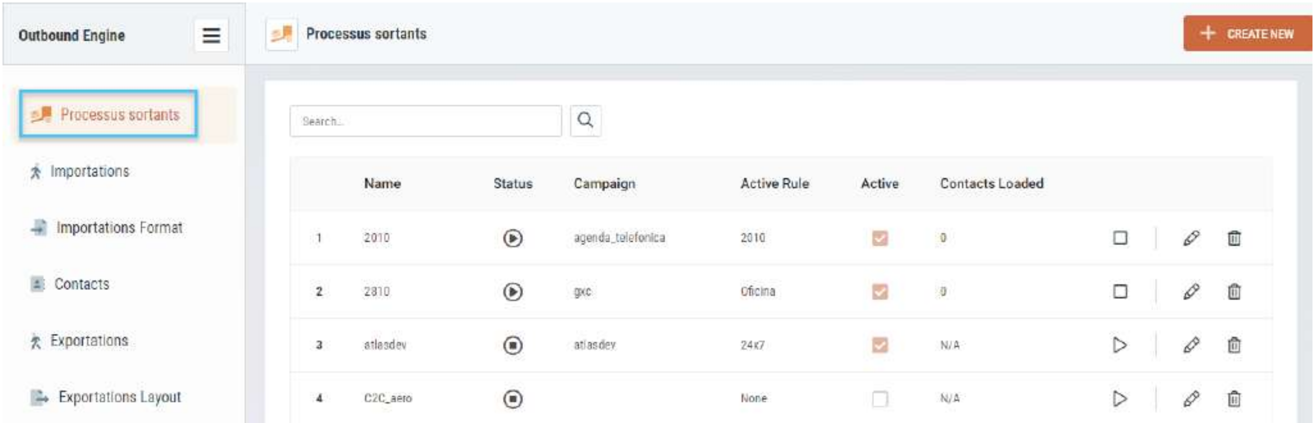
- How to create an Outbound Process
- How to create Contacting Rules
- How to create Batches of Contacts
- How to recycle Batches of Contacts
- How to set up dialing by percentage of batch

How to create an Outbound Process

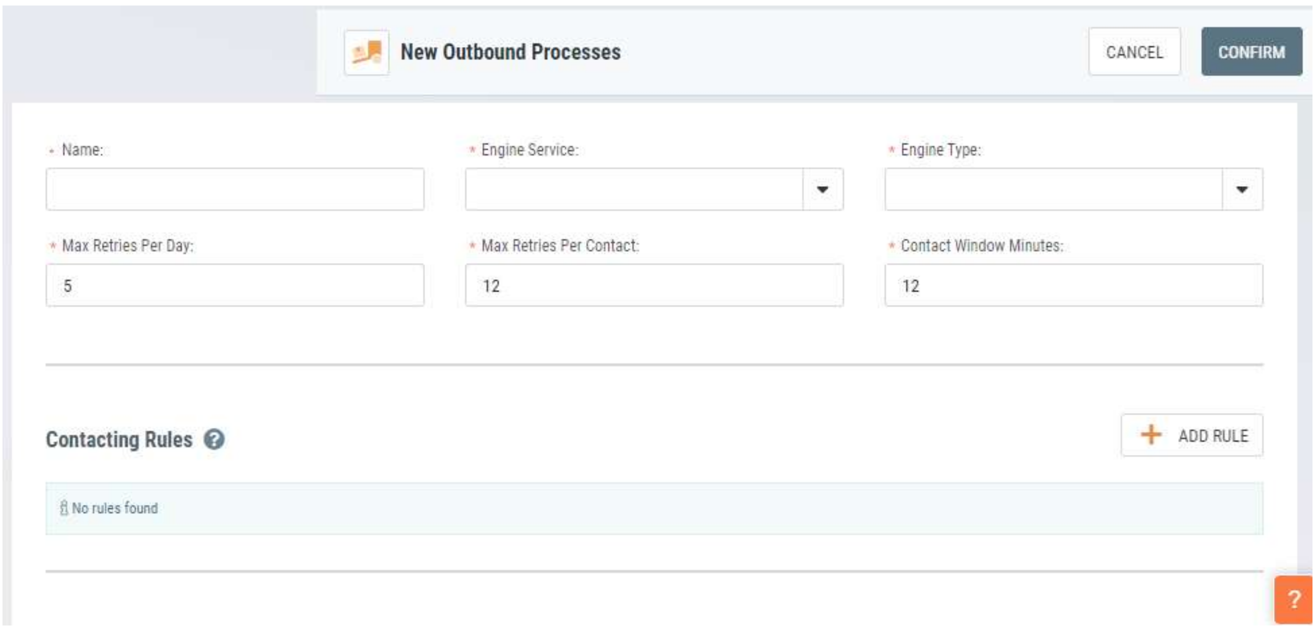
Once the Importation of Contacts to the platform has been carried out, it is possible to generate an Outbound Process (automatic dialer).

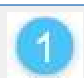
To generate an Outbound Process, follow these steps:

1. Access the Outbound Engine
2. Go to the section Outbound Processes



3. Click the 'New Process' button to display the following screen:





Automatic outbound process

To configure an Automatic Outbound Process, it is necessary to fill in these fields:

Name: indicates the name that will identify the process.

Engine Service: here the administrator will choose the service from which the outbound process can be executed.

Engine Type: In this field, the administrator will indicate what engine type the process will use. It could be a Phone Call Engine, a Mail Engine, or an SMS Engine.

Max Retries per day: indicates the maximum number of calls that the system is allowed to make each day.

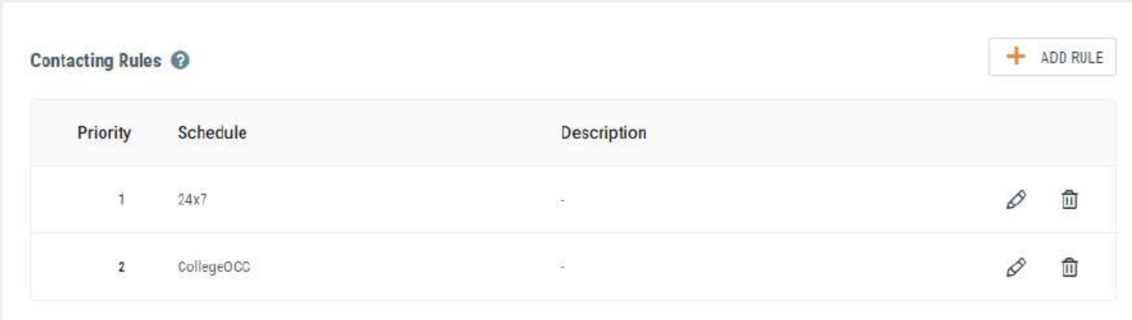
Max Retries per contact: indicates the maximum number of calls that the system is allowed to make to a specific contact.

Time window: the number of minutes that the system stores the contact you are calling in its cache. For example, if the system is dialing at a rate of 5,000 calls per hour, and the call window is 30 minutes, the system will have 2,500 contacts in memory.

After completing these fields, the administrator must choose a Contacting Rule from the list below.

2 Contacting rules

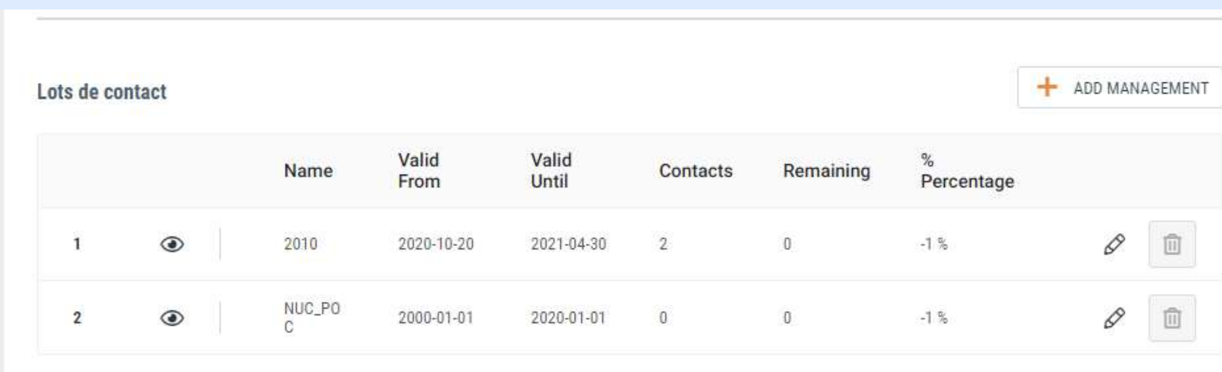
a. You must create contacting rules for each outbound process.
b. The rules created will appear in a list.



In order to change rules priority you can drag and drop the rows.

4. Click the 'Create' button to enable the management of Batches of Contacts.

The batch created will appear in the list as follows:



5. Click the 'Update' button to save the process.

Related Articles

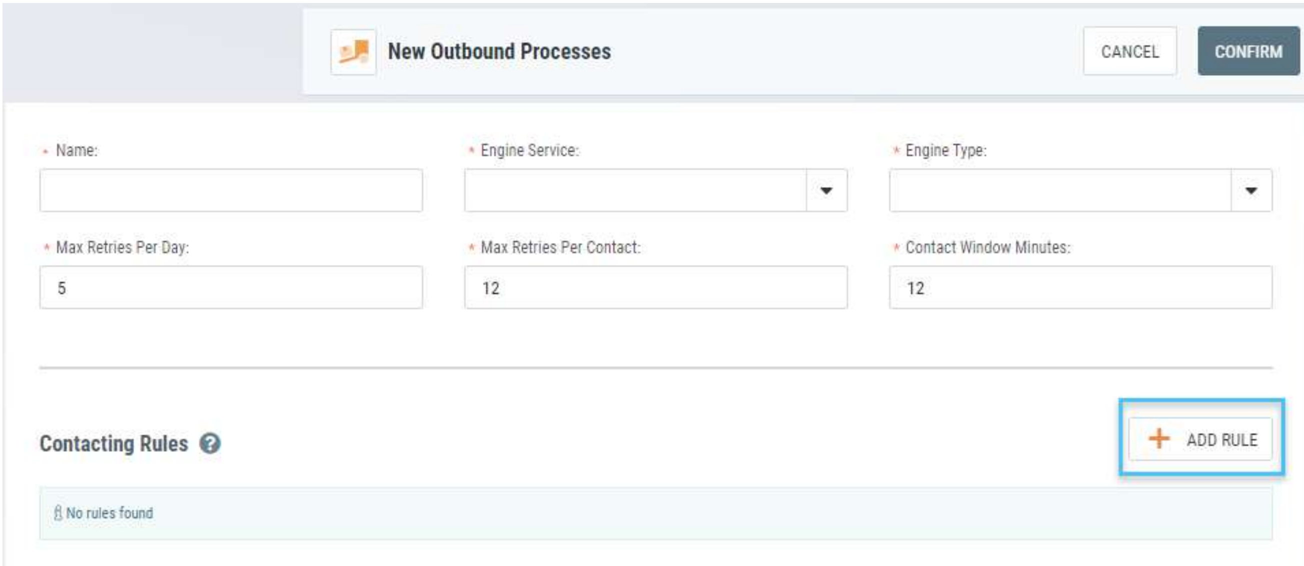
- How to layout an Exportation
- How to create an Importation
- How to set up dialing by percentage of batch
- How to recycle Batches of Contacts
- How to create Contacting Rules

How to create Contacting Rules

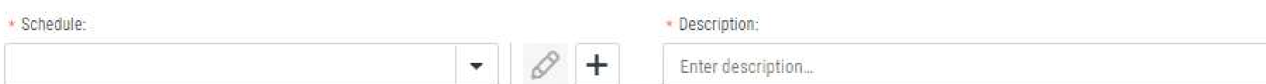
A Contacting Rule is a set of procedures that the system will carry out to contact clients.

To create a Contacting Rule for an Outbound Process:

1. Click the 'New Rule' button.



2. Enter the schedule and description of the new rule.



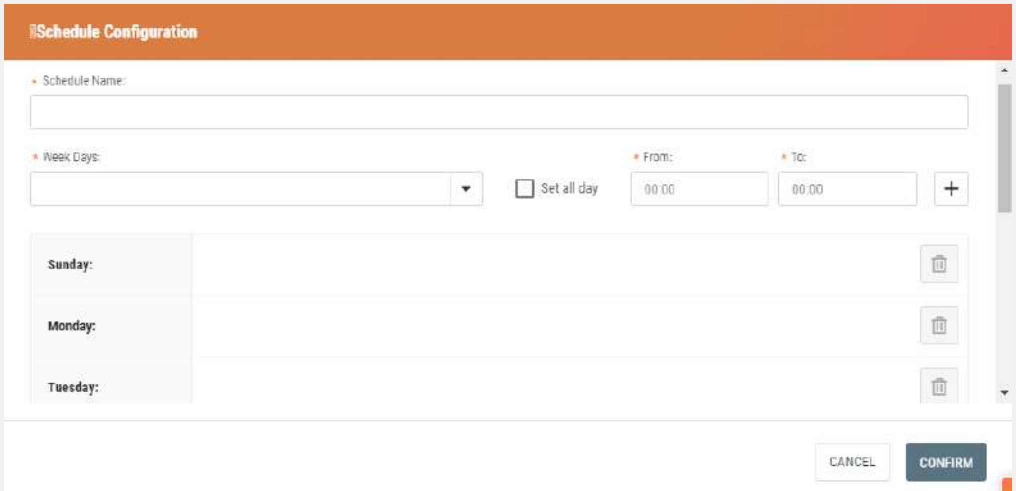
Schedule: the administrator can create a new schedule for calls or use a previously created schedule.

In any case, there must be an assigned schedule for each process.

How to add a new schedule

To create a new schedule, follow these steps:

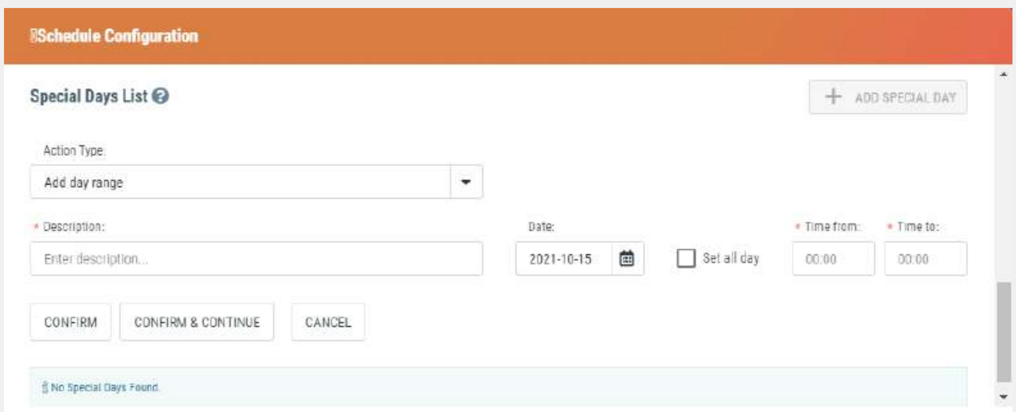
a. Click the button  located on the right of the dropdown.



Rule scheduler

Schedule name: represents the name that will identify the rule.

Schedule global settings: Represents the operating schedule of the outbound dialing campaign.



Non-standard days

Non-standard days are days that overwrite global settings.

Add day range: Used to indicate the date/time that the process will be active.

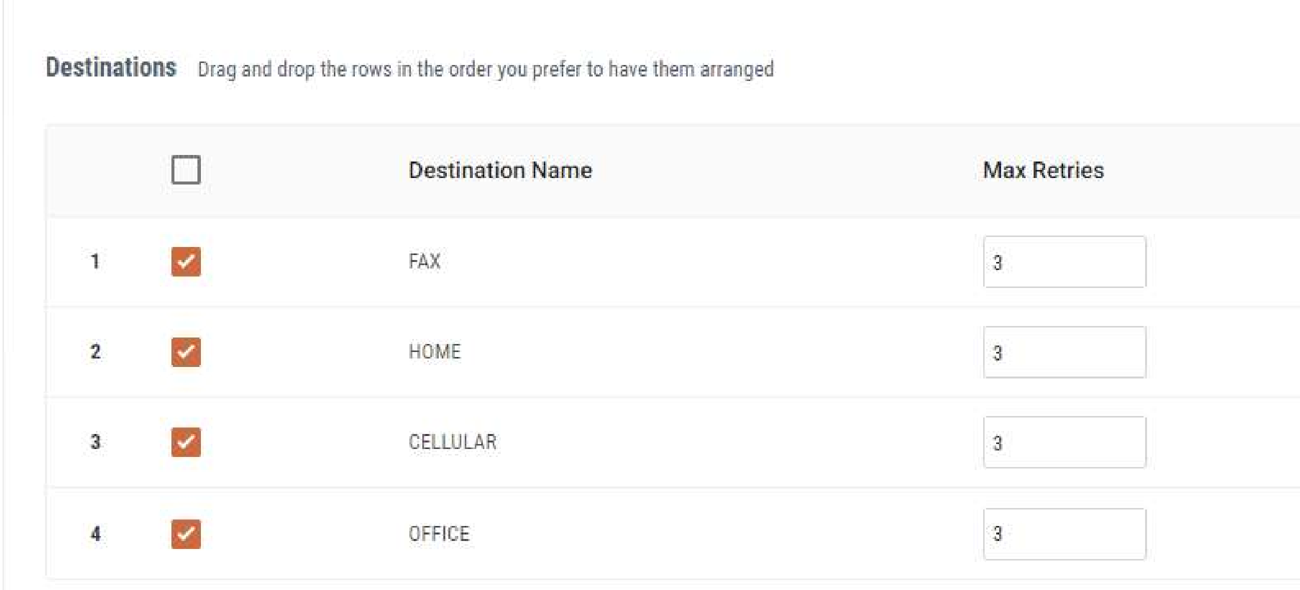
Override configuration of day: If we use this option, the chosen dates will have a special working schedule that may not coincide with the normal working hours of the outbound engine.

Day exclusion: Here you can configure the days when the outbound process will not be running, and you can clarify the reason for this (public holidays for example)

b. After completing the configuration of the schedule, click the 'Create' button, or 'Create & Continue' to generate another.

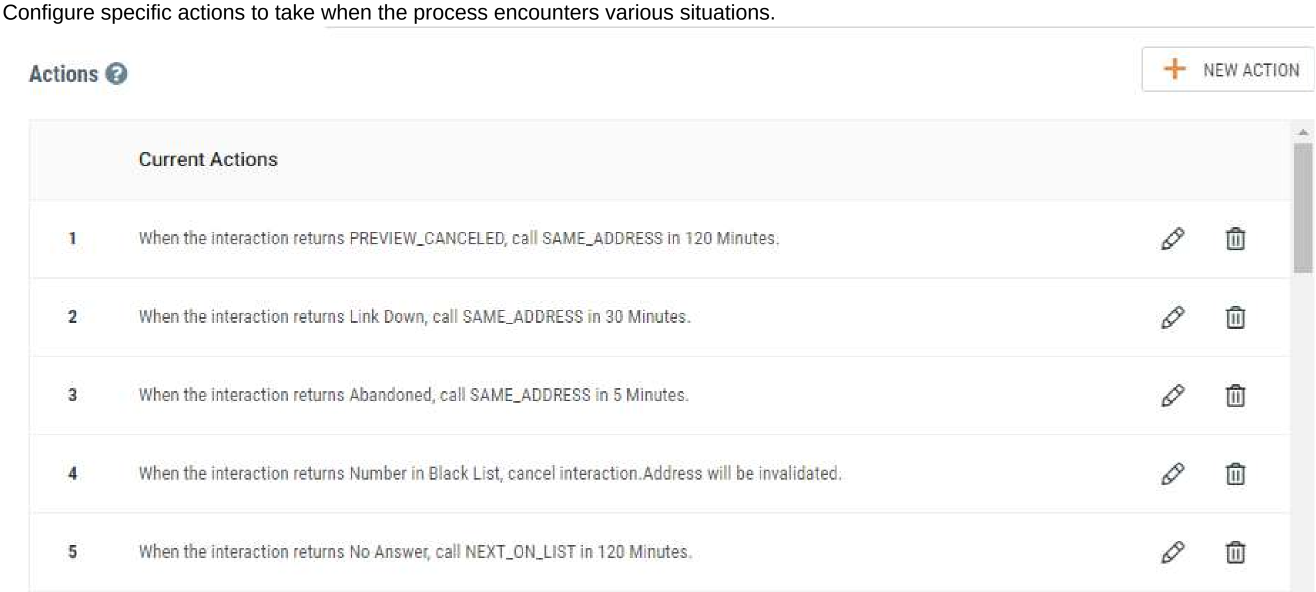
Description: enter a brief description of the call schedule. For example: "Only Wednesday", etc.

3. Select the contact destinations that the process will use to communicate with the client, the order and maximum retries per destination



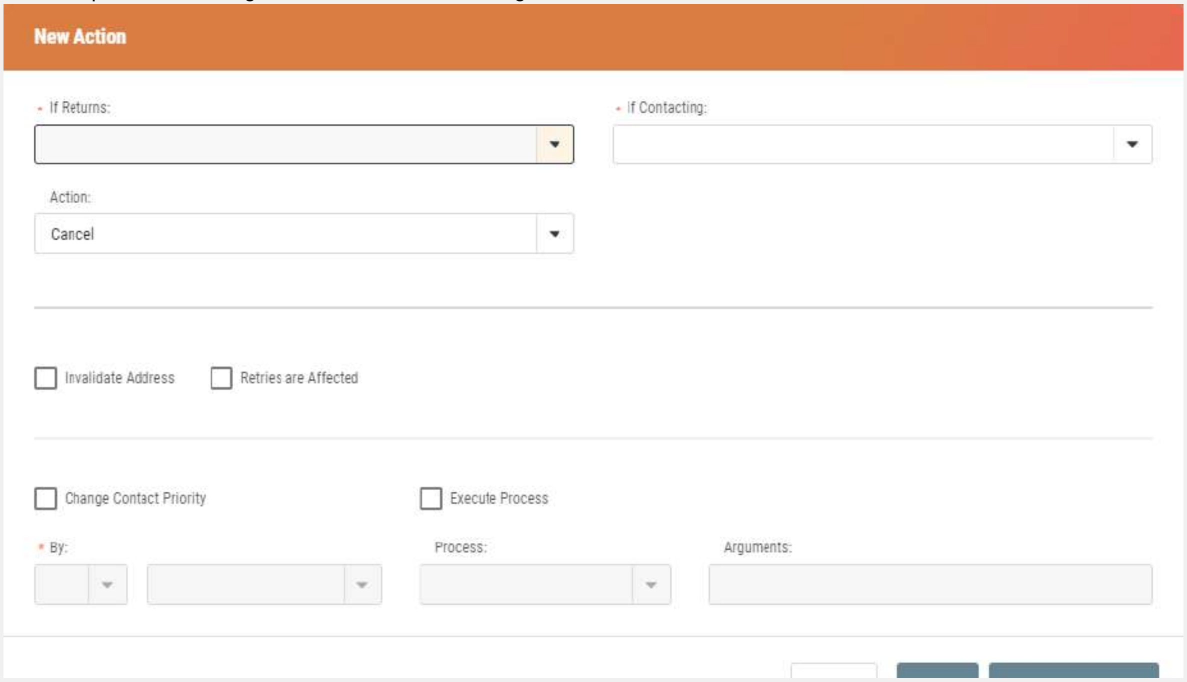
In order to change rules priority you can drag and drop the rows.

4. Configure specific actions to take when the process encounters various situations.



Actions

Here it is possible to configure new actions, once configured click the 'New Action' button to add it to the current ones.



Si retorna

a. Abandoned
b. Answering machine
c. Busy
d. Call Rejected
e. Call Rejected by Endpoint
f. Can't Route to Endpoint
g. Config error
h. Congestion
i. Connected
j. Fax
k. Handshaking failed
l. In Progress
m. Indirect contact
n. Invalid use network
o. Dropped connection
p. Network Error
q. No Answer
r. Normal Call End
s. Blacklisted number
t. Protocol Error
u. The contact died
v. Number Changed
w. Cause Unknown

Contactando

a. Home
b. Fax
c. Cellular
d. Office
e. Any Destination.

Action: Represents the action to take if it is fulfilled: returns x contacting y.

5. Once the actions have been configured / selected, click the 'Add rule' button.

Related Articles

- How to delete a rule
- How to edit a rule
- How to define a new rule
- What are the rules for?
- What are notifications and what are they for?

How to create Batches of Contacts

Batches of Contacts are groups of contacts that share common characteristics.

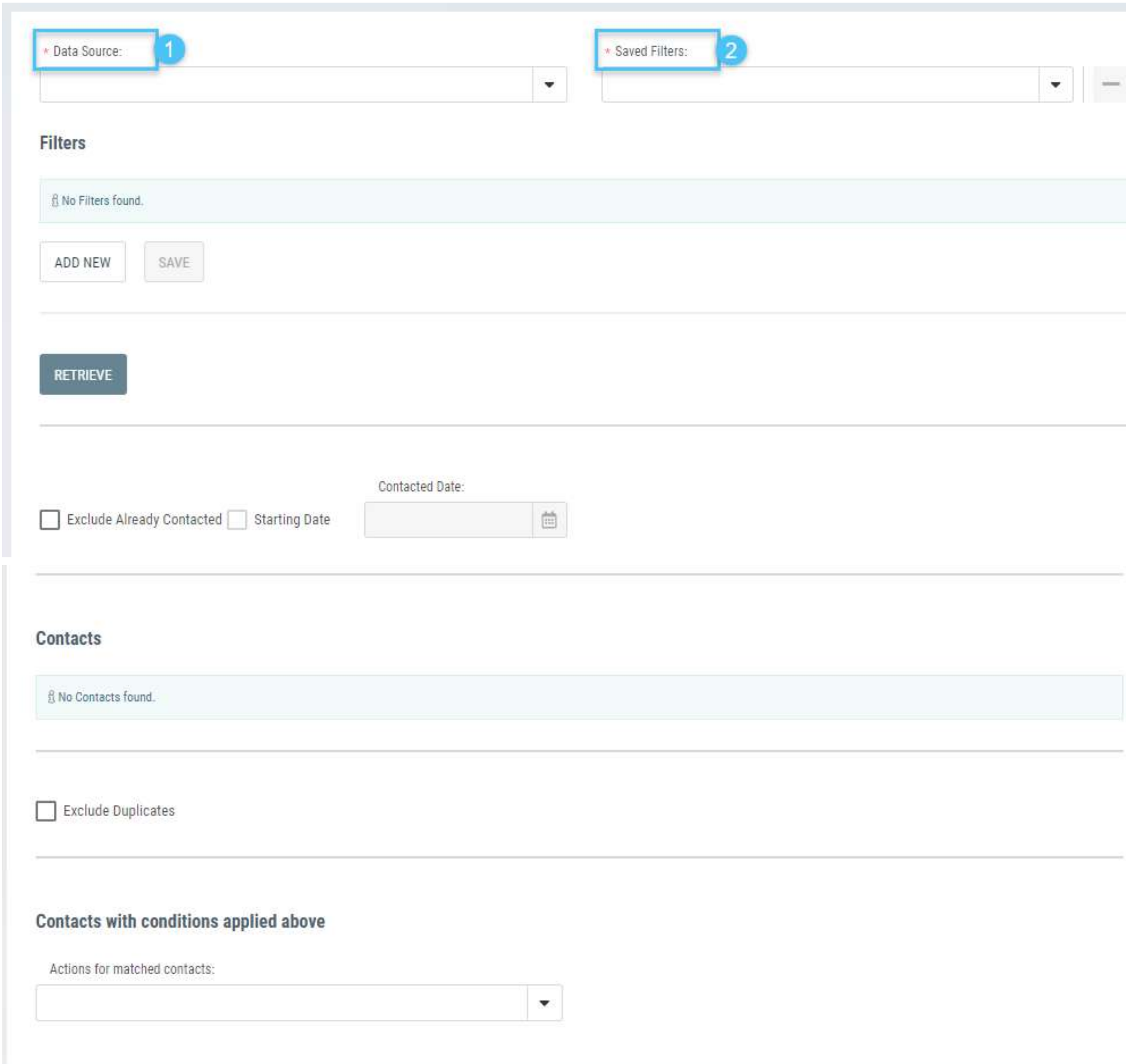
Ejemplo
If the campaign should focus on people from country "X" who own a cellular phone, the administrator will create filters that will serve the data base.

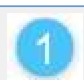
These batches are usually used to create an Outbound Process.

To generate a new Batch of Contacts, follow these steps:

1. Go to the article How to create an Outbound Process and complete it up to point No. 5

2. The batch administration window looks like this





Data Source

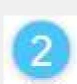
Here you must choose the source of the contacts to be used, the contacts must have been imported previously.

Origen de datos

Contacts from the database: the source of the contacts is the group of contacts imported into the data base.

Use this option if you want to create a new batch of contacts.

Current Process Batches: to work on a batch of contacts created previously.



Saved Filters

a. If a filter has previously been created, it can be used by selecting it from the "Saved Filters" list.

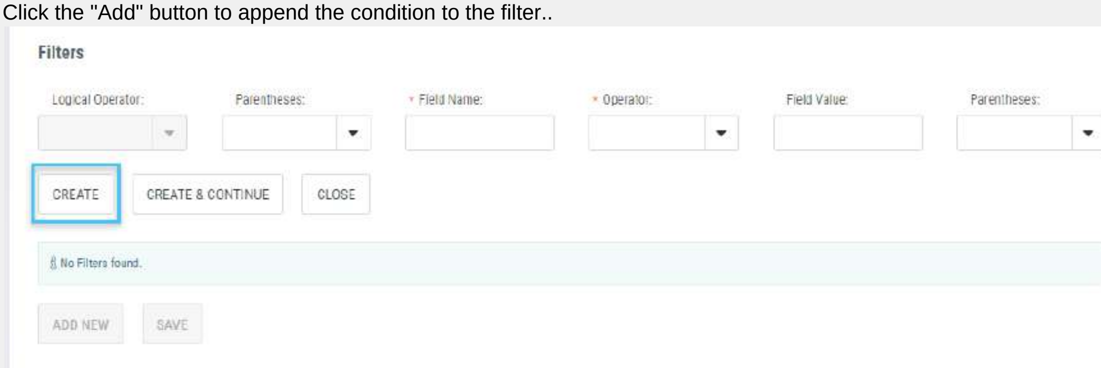
b. If not, then a filter can be generated from scratch. For this, it is necessary to generate the conditions that the contacts must meet to be part of the batch.

   i. The first condition must be entered without any operator at the beginning. That is, the first field on the left must be left blank.

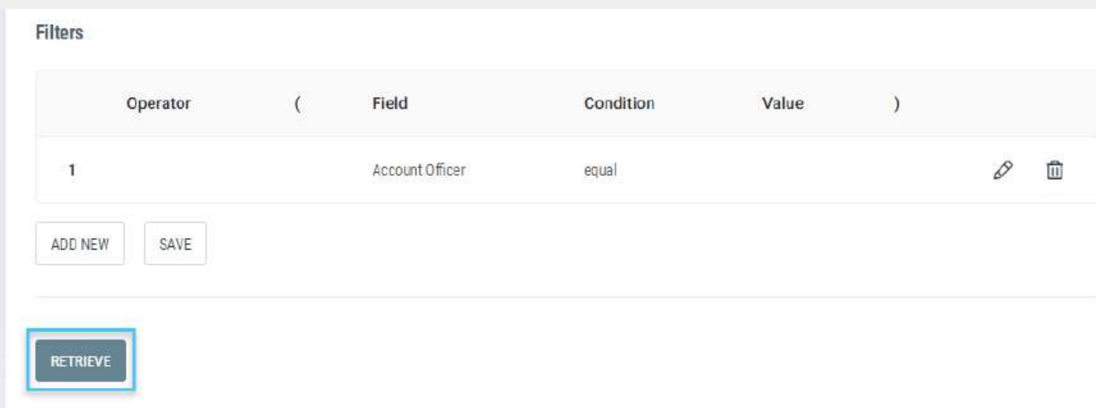
   ii. The rest of the conditions must be entered according to the batch requirements.

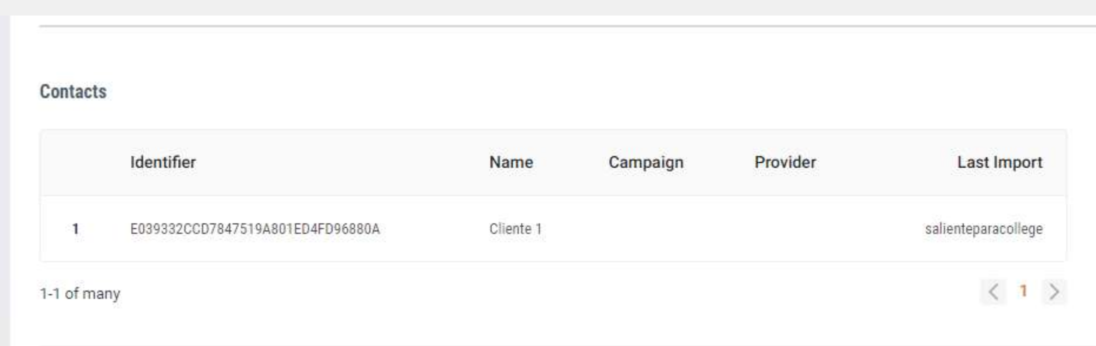
   > If it is necessary for the contacts to meet more than one condition, the following conditions must start with the "AND" operator. If, on the other hand, it is necessary that the contacts comply with ONE or ANOTHER condition, the second condition must begin with the operator "OR".

   iii. Click the "Add" button to append the condition to the filter..

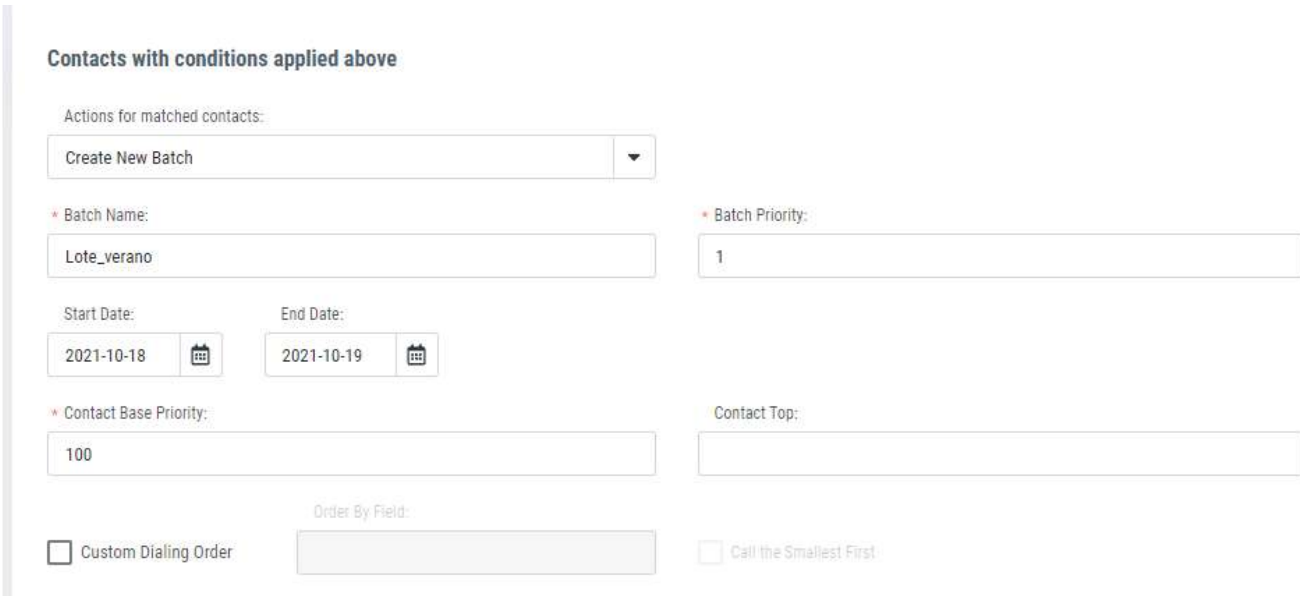


   iv. Once all the conditions have been configured, click the 'Retrieve' button for the system to identify the contacts that comply with the filter and complete the list with these contacts





3. Configure a specific process for the data obtained.



Action: In this case the administrator can choose to create a new batch of contacts.

If you want to recycle a batch of contacts, see the following article: How to recycle Batches of Contacts

Batch Name: The name that will identify the new batch of contacts.

Batch Priority: Indicates the importance of a batch in relation to the other batches.

Ejemplo
If we wanted to call clients with higher debt levels first, we should create a batch with them, to which we would assign a higher level of priority.

Start Date: Since each batch can be valid for a period of time, there must be an indication of when the validity period begins.

End Date: Indicates when the validity period will end.

Base Contact Priority: The basic priority for the contacts that make up the batch.

The contacts with the highest priority are called first.

Custom Dialing Order: If this option is activated, the system will not randomly call the contacts, but will make the calls in a certain order.

Order By Field: Indicates which field the system will order the contacts by.

The Base Contact Priority is the place the contact occupies in the outbound call list. This field is related to the "Order by Field" function.

Call Smaller First: If this option is activated, the system will call the contacts in ascending order.

Ejemplo

If the field chosen to order the contacts is "Number of transactions in the last month", the system will call the clients with zero transactions first.

4. Once the batch is configured, click the "Save" button to save the changes made.

Related Articles

- How to layout an Exportation
- How to create an Importation
- How to set up dialing by percentage of batch
- How to recycle Batches of Contacts
- How to create Contacting Rules

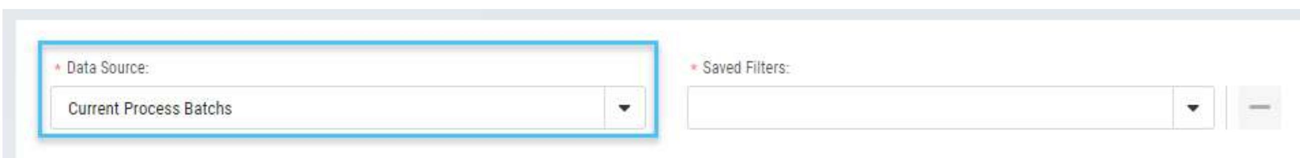
How to recycle Batches of Contacts

In this article you will learn how to recycle Batches of Contacts.

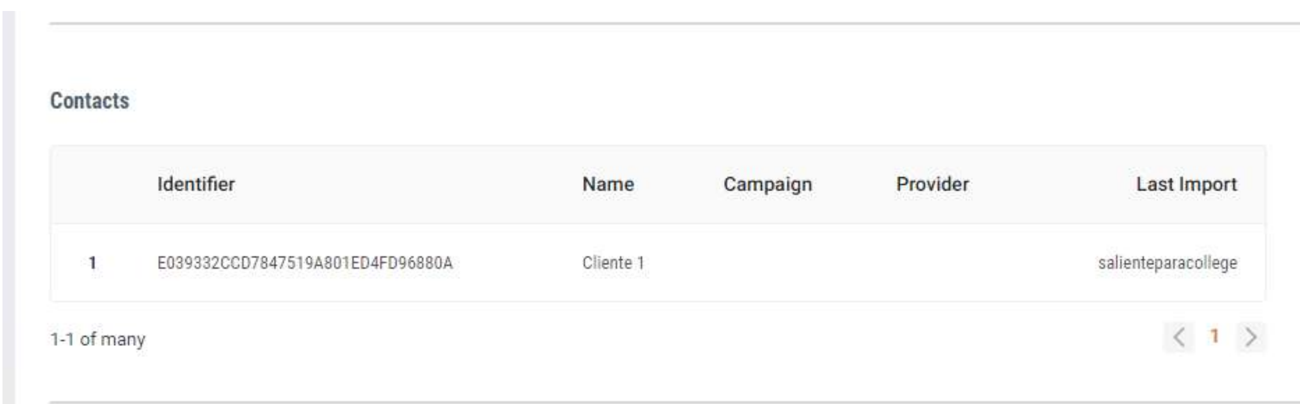
Before you can recycle contacts you must create Batches of Contacts.

So, to recycle Batches of Contacts:

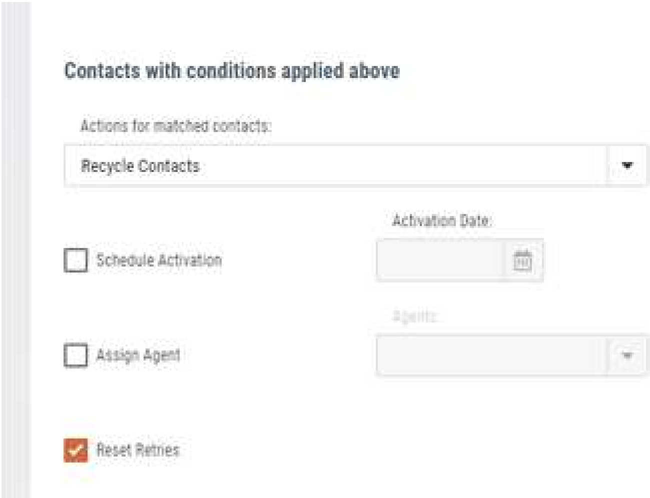
1. Go to the Batches administration panel.
2. In the "Data source" section, select the option "Current Process Batches".



3. Set the filter to "Retrieve" the contacts you want to recycle.



4. Select "Recycle contacts" in the option "Action to apply to matched contacts".



If you want to recycle the contacts so that they are redialed, just click the 'Execute' button, since the 'Reset Retries' box will be checked by default.

Schedule Activation: If this option is checked, it will be possible to choose an activation date.

Activation Date: Schedule activation date, contacts will resume automatically on that date.

Assign agent: If this option is checked, it will be possible to assign those contacts to a specific agent.

Agents: Enter the first name of the agent to whom you want to assign the contacts.

Reset Retries: It will reset to "*0*" those retry counters for each contact.

5. Click the 'Update' button to apply the changes.

Related Articles

- User search
- How to set up Messenger messaging
- How to associate a YouTube account
- How to associate an application from Google Play Store
- How to associate an application from the App Store

How to set up dialing by percentage of batch

The administration of percentage per batch allows the system to specify from which batches your contacts should be taken for dialing and what percentage of each batch.

The Outbound Engine will take contacts from these batches, maintaining that proportion during the operation.

Some contacts do not apply for this collection criterion, such as contacts that have a reserved agent, or with a later rescheduling date, since you have configured specific behaviors for them.

For example, if you have three batches configured as follows:

1. **Batch A:** 50 contacts - at 50%
2. **Batch B:** 150 contacts - at 50%
3. **Batch C:** 200 contacts - at 0%

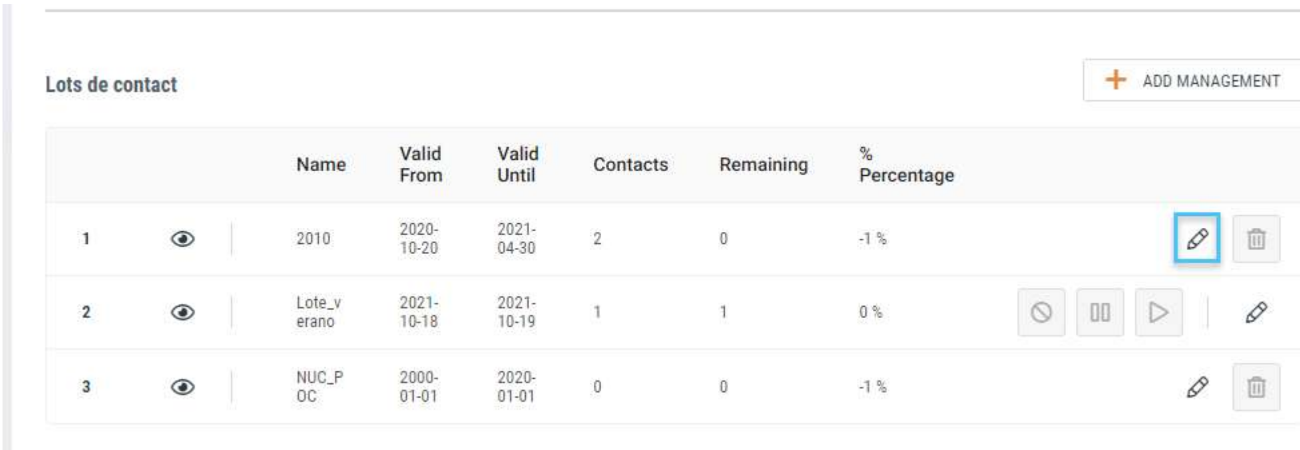
And the Dial Engine needs to call 150 contacts; the first batch cannot cover the 75 contacts it must raise (50% of the 150 contacts), so it will take the 50 contacts from batch A, 75 contacts from batch B and the remaining 25 contacts from batch B and C, that is, from whichever batch it can get contacts to complete the 150 contacts required.

The 0% of batch C is because it does not have a %, but it is enabled for contacts to be taken from it if they cannot be fulfilled from the other batches.

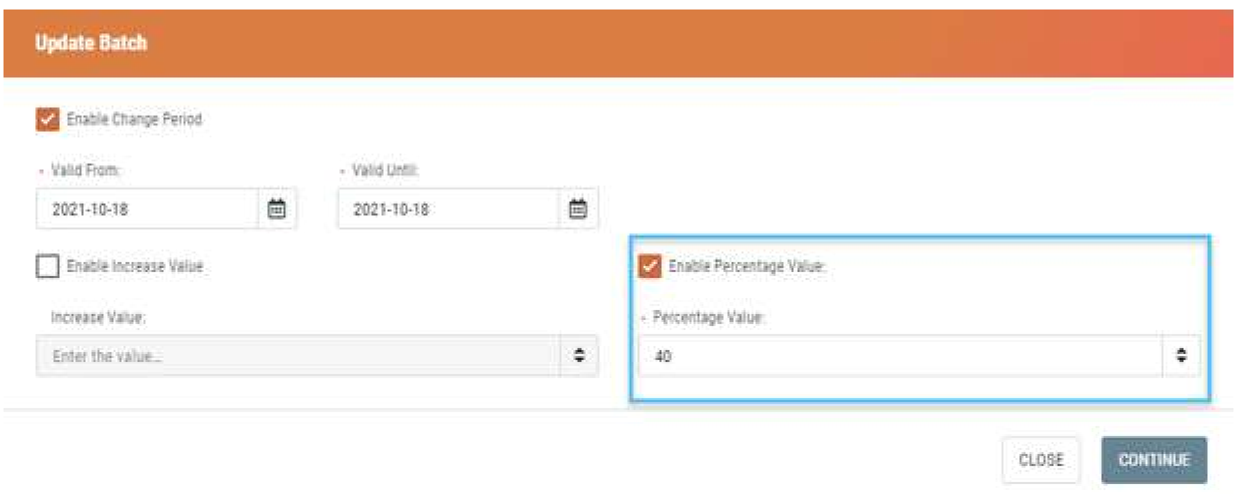
The percentage that is assigned to each batch does not represent the percentage of each batch individually (for example, 50% of the 50 contacts in Batch A), but rather the percentage of how many calls the outbound engine makes should take contacts from each batch (50% of the calls are made with contacts from Batch A and another 50% with contacts from Batch B).

To assign participation percentage to a batch:

1. Click the 'Edit' button in the corresponding batch row:



2. Indicate the percentage value to assign for that batch:



3. Click the “Update” button to save the data.

The possible values for the percentage (point 2) are the following:

- **-1**: Used to disable the batch. If the value of the batch is -1, it is not used to provide contacts to the Dial Engine.
- **0**: Indicates that contacts are to be taken from that batch but without a specific percentage. If all the batches have a value of 0, contacts are taken from them without considering any particular percentage.
- **Percentage:** Indicates that the stated percentage of calls made should be taken from that batch.

Note
No more than 100% can be allocated to the distribution of the batches.

Related Articles

User search
How to set up Messenger messaging
How to associate a YouTube account
How to associate an application from Google Play Store
How to associate an application from the App Store

Importations

Search

- How to create an Importation
- How to perform Field Mapping

How to create an Importation

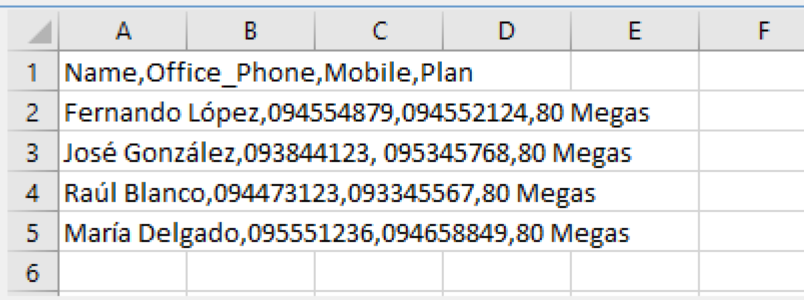
It is necessary to generate a .csv file with the data to be imported
This file must contain the data to be entered (Contact name, phone number, etc.) separated by commas.

To make it easier to distinguish between columns, we recommend using a spreadsheet application (e.g. Excel) to enter the data.

To generate a .csv file for an importation:

1. Enter the data separated by commas

Example:

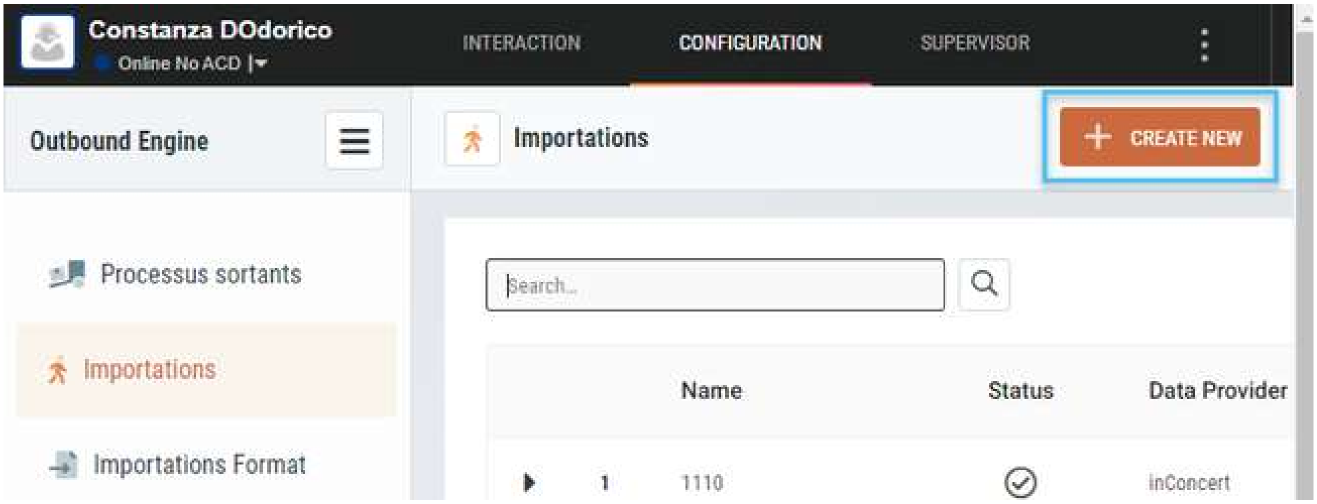


	A	B	C	D	E	F
1	Name,Office_Phone,Mobile,Plan					
2	Fernando López,094554879,094552124,80 Megas					
3	José González,093844123, 095345768,80 Megas					
4	Raúl Blanco,094473123,093345567,80 Megas					
5	María Delgado,095551236,094658849,80 Megas					
6						

2. Save the file in .csv format

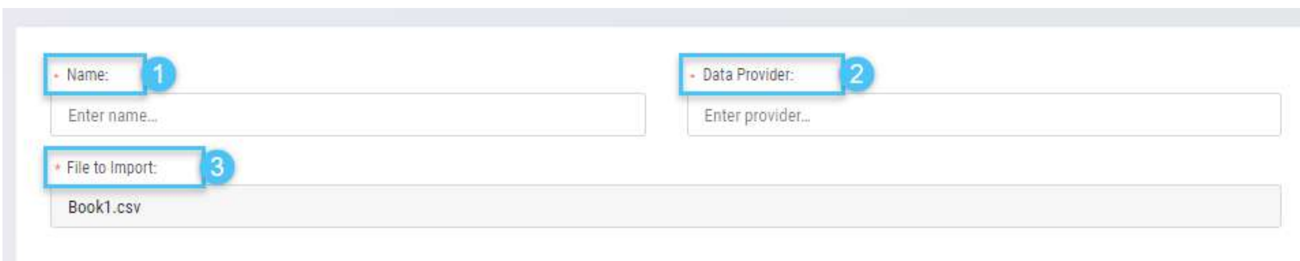
Once you have your .csv file loaded with the data to be imported, follow these steps to create an Importation:

1. Access the Outbound Engine
2. Enter Importations.
3. Click the 'New importation' button

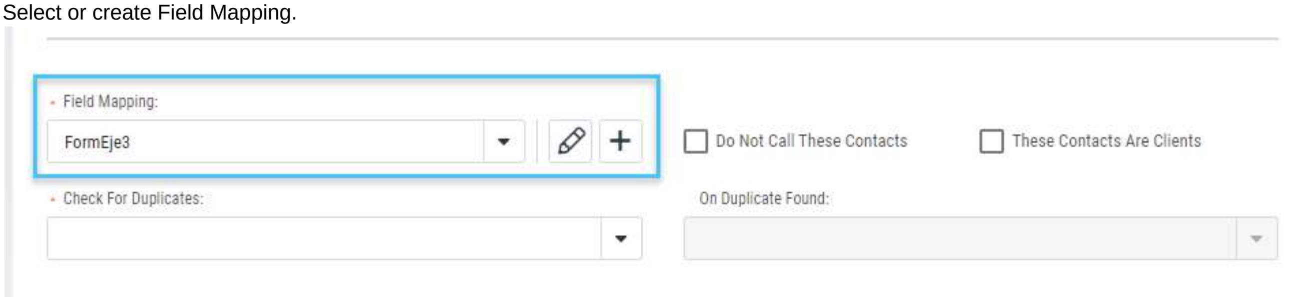


4. Enter Name, Data Provider and File to import. Then, click the 

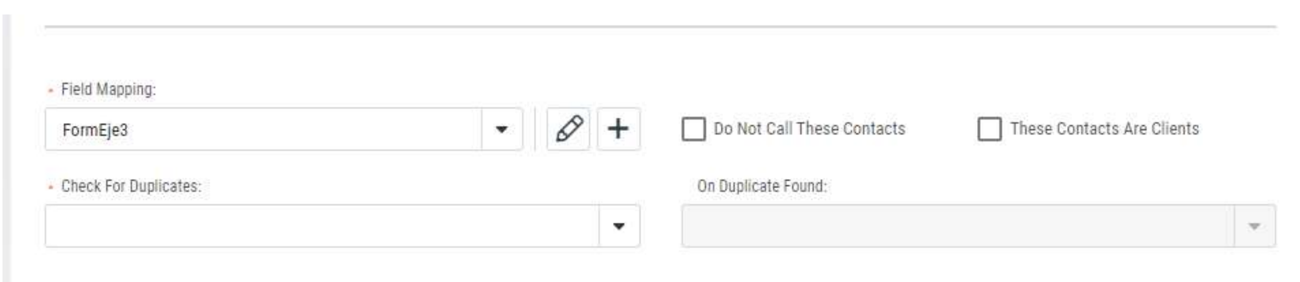
button to load the file.



5. Select or create Field Mapping.



6. Fill out the data required to complete the new importation.



Duplicate check

Check for duplicate contacts from past imports.

- Phone
  It will search for duplicates in the phone field.
- Phone and name
  It will consider a phone to be duplicated only if the phone and name fields are identical.
- Contact ID
  It will search for duplicates in the Contact ID field.

If there is duplicates

Actions to be taken if duplicate contacts are found.

- Replace with new information
  Replace the old record with the information from the new importation.
- Keep old record of contact
  Keep the old record containing the information from the previous importation
- Add new info to old records of contact
  When the system finds two contacts with the same ID, it keeps the current information as the main record and adds the information from the new importation, without deleting any repeated information
- Add new information to old contact
  When the system finds two contacts with the same ID, it saves the new information as the main record and adds the information from previous importations without deleting any repeated information.

Do Not Call These Contacts: If this option is enabled, the dialer will never call the imported contacts (blacklist).

These Contacts Are Clients: Enable this option if the imported contacts are clients.

7. Once the data is completed, click the "Start" button to start importing contacts.

Related Articles

- User search
- How to set up Messenger messaging
- How to associate a YouTube account
- How to associate an application from Google Play Store
- How to associate an application from the App Store

How to perform Field Mapping

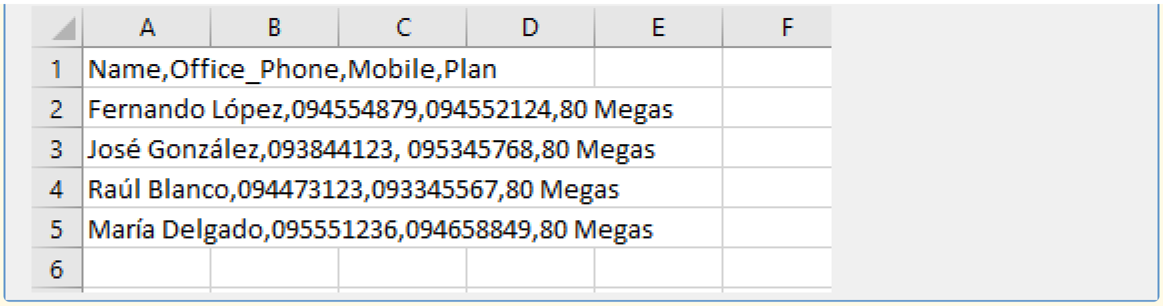
To generate an import/mapping of fields, it is necessary to generate a .csv file with the data to be imported
To generate an importation / mapping of fields it is necessary to generate a .csv file with the data to be imported. This file must contain the data to be entered (Contact name, phone number, etc.) separated by commas.

To make it easier to distinguish between columns, we recommend using a spreadsheet application (e.g. Excel) to enter the data.

To generate a .csv file for an importation:

1. Enter the data separated by commas.

Ejemplo:

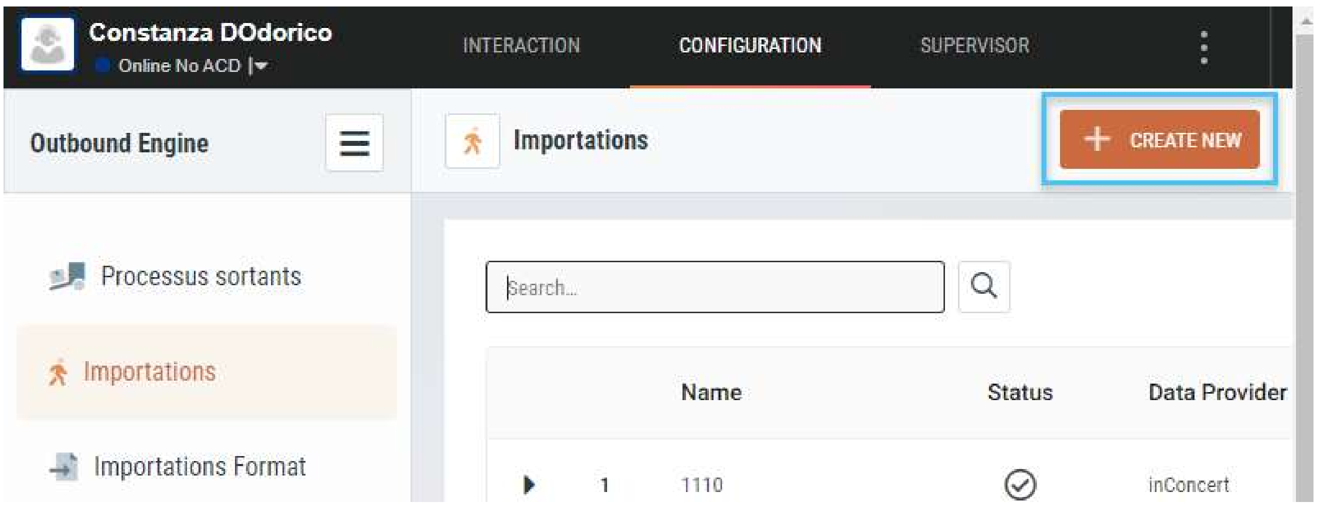


	A	B	C	D	E	F
1	Name,Office_Phone,Mobile,Plan					
2	Fernando López,094554879,094552124,80 Megas					
3	José González,093844123, 095345768,80 Megas					
4	Raúl Blanco,094473123,093345567,80 Megas					
5	María Delgado,095551236,094658849,80 Megas					
6						

2. Save the file in .csv format

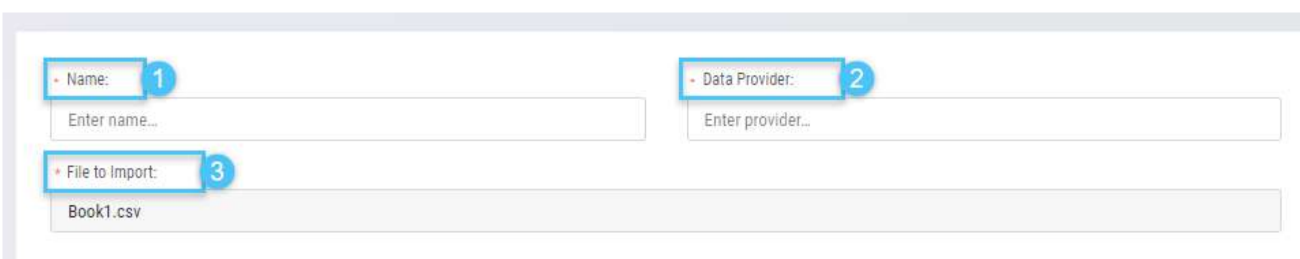
The Field Mapping tells the platform how it should read the contact database that we want to import. To perform the Field Mapping, follow these steps:

1. Within the Administration of Dial Engines, enter Importations.
2. Click the 'New importation' button

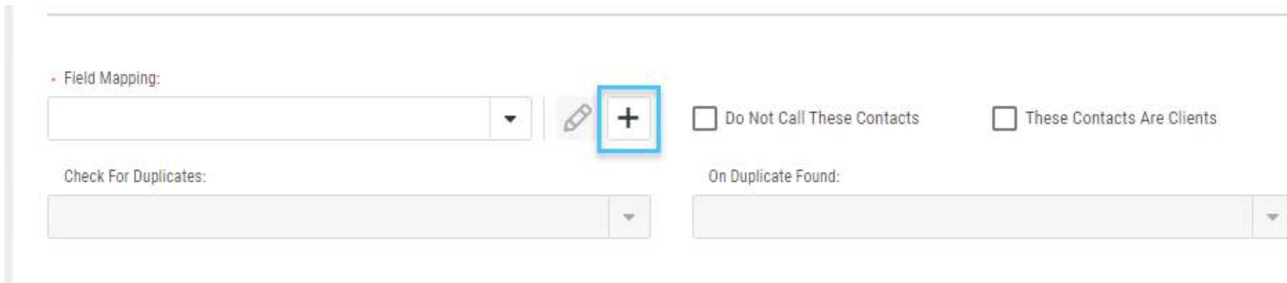


3. Enter Name, Data Provider and File to import. Then click the button 

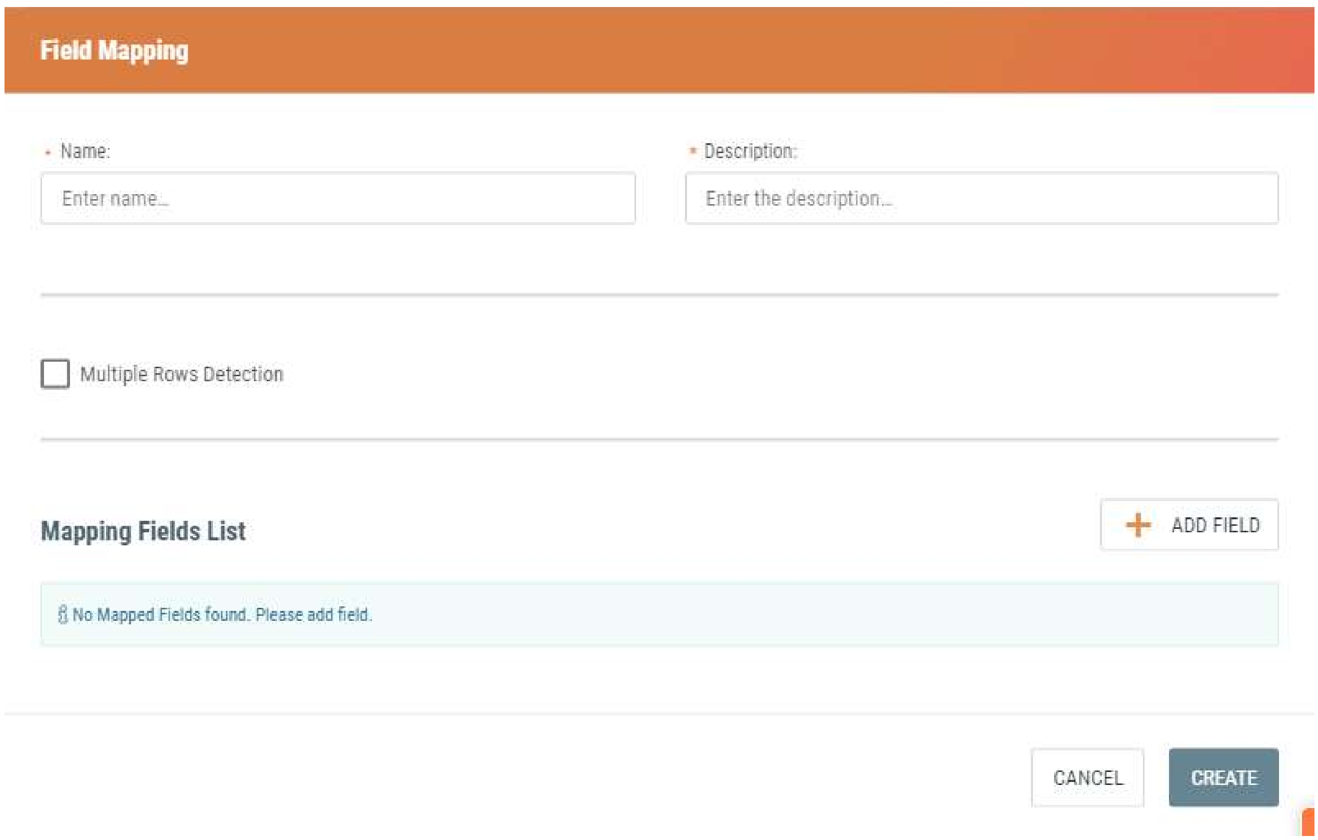
to upload the file.



4. Field Mapping will be enabled; click the  button to create a new Field Mapping.



5. Enter the required data



Información del mapeo de campos.

Name: Name that will be assigned to the Field Mapping.

Description: Its description.

Multiple Rows Detection: Enable when the mapping has multiple rows.

Información del campo

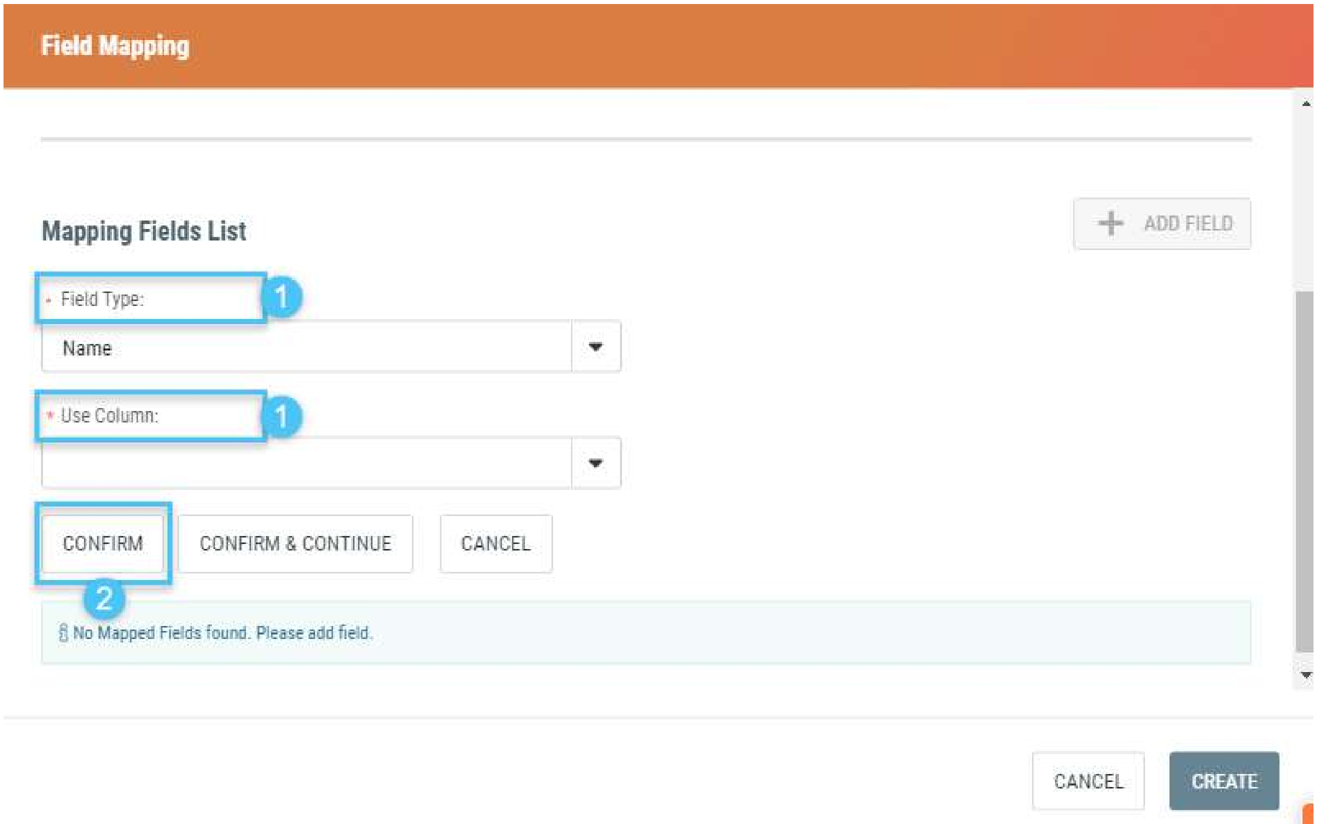
Field Type: We select the type of data that corresponds to the column (of the .csv file) that we want to assign.

The essential data are always: name and a phone number to be able to identify and call the contact.

The contact database can be configured according to the client's needs, therefore, the Field Type: "Name Value", allows you to add all the field values that do not appear by default in inConcert Allegro.

Use Column: We select from which column (of the .csv file) we want to obtain that information.

6. Enter the Field Type and the Column to use for each of the columns of the .csv file and then click the "Add" button



Repeat this procedure for each of the columns of the *.csv* file that contains the data to be imported.

7. Once all the fields have been mapped. Click the "*Create*" button.

The mappings can be reused as long as the lists of contacts (*.csv* files) have the same structure.

Related Articles

- User search
- How to set up Messenger messaging
- How to associate a YouTube account
- How to associate an application from Google Play Store
- How to associate an application from the App Store

Importation Formats

Search

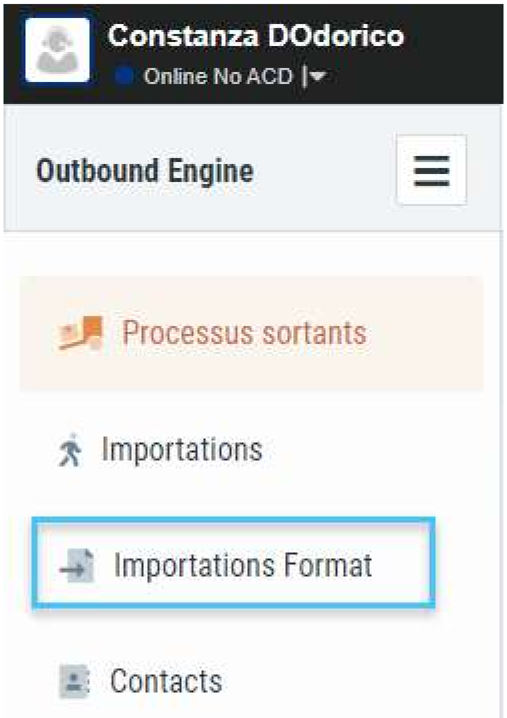
- How to view the Importation Formats

How to view the Importation Formats

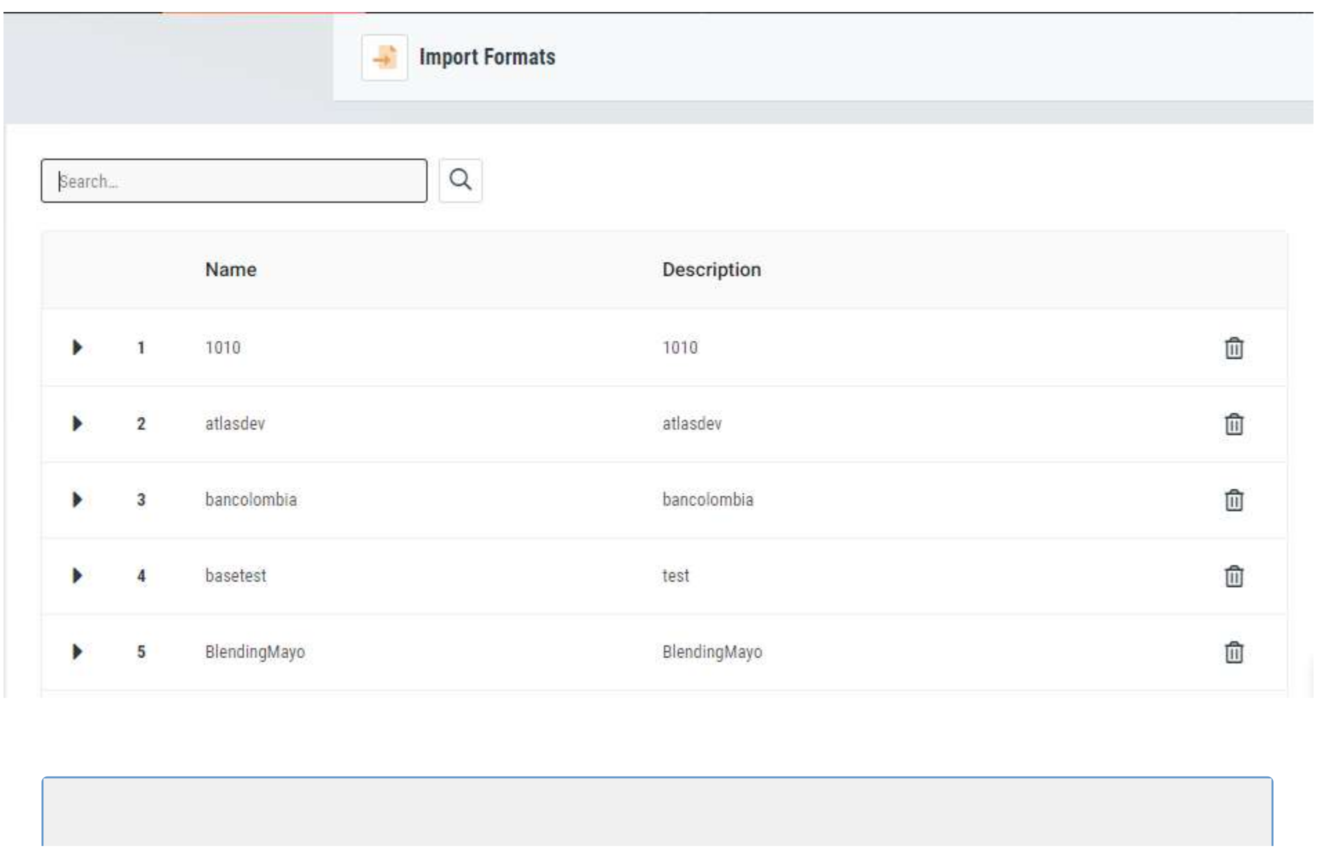
The importation formats are created from the *Field Mappings*.

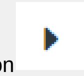
To view the Importation Formats, follow these steps:

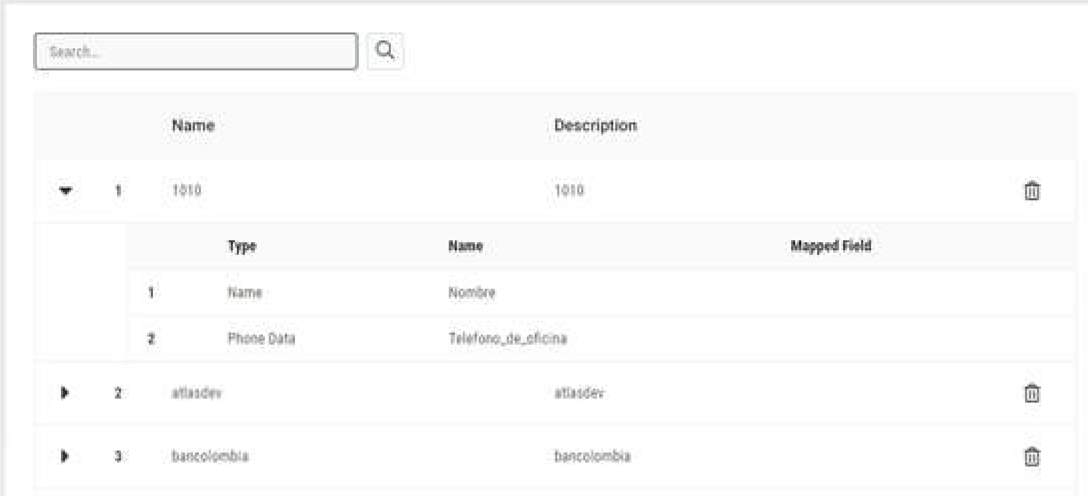
1. In Outbound Dialing Administration, go to "Importation Formats"



2. You will then see a screen like this.



a. Clicking the button  in a specific format, you will see all its fields.



b. Likewise, you can delete the Importation Format by clicking the "Delete" button.

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- User search
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- How to associate an application from the App Store

Contacts

Search

- How to view the list of contacts

How to view the list of contacts

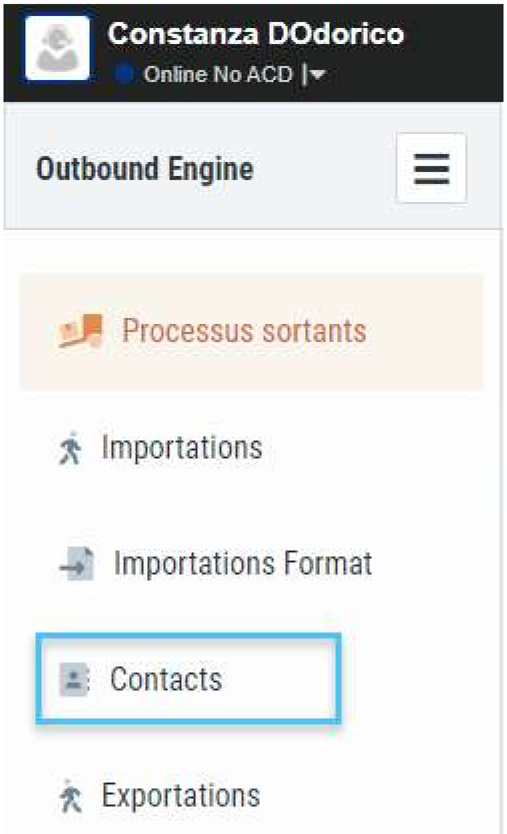
This article will explain how to view the list of contacts imported into the data base of an OCC server.

⚠ To view the list of contacts, it is first necessary to import contacts to the server.

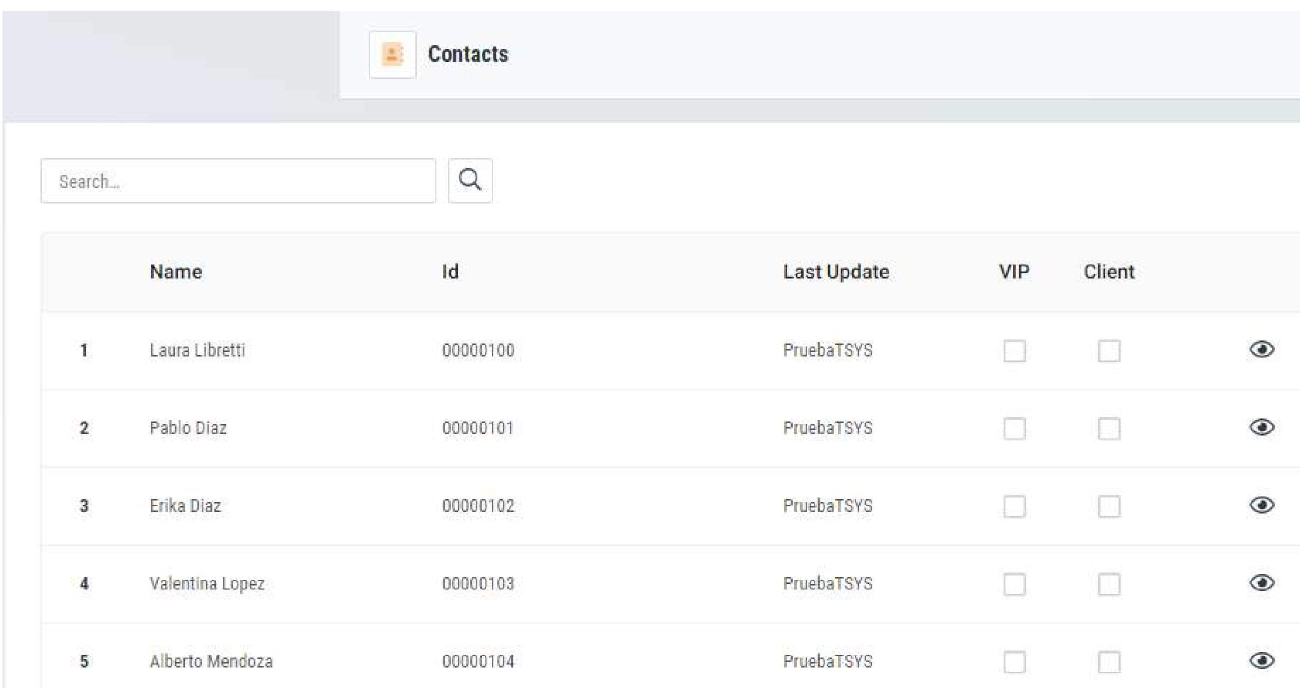
So if you want to view the list of contacts, follow these steps:

1. Access the Outbound Engine.

2. Go to "Contacts"



3. You will see in this list all the contacts in the server's data base or the contacts that meet the conditions of the filter applied.



Related Articles

- User search
- How to set up Messenger messaging
- How to associate a YouTube account
- How to associate an application from Google Play Store

How to associate an application from the App Store

Exportations

Search

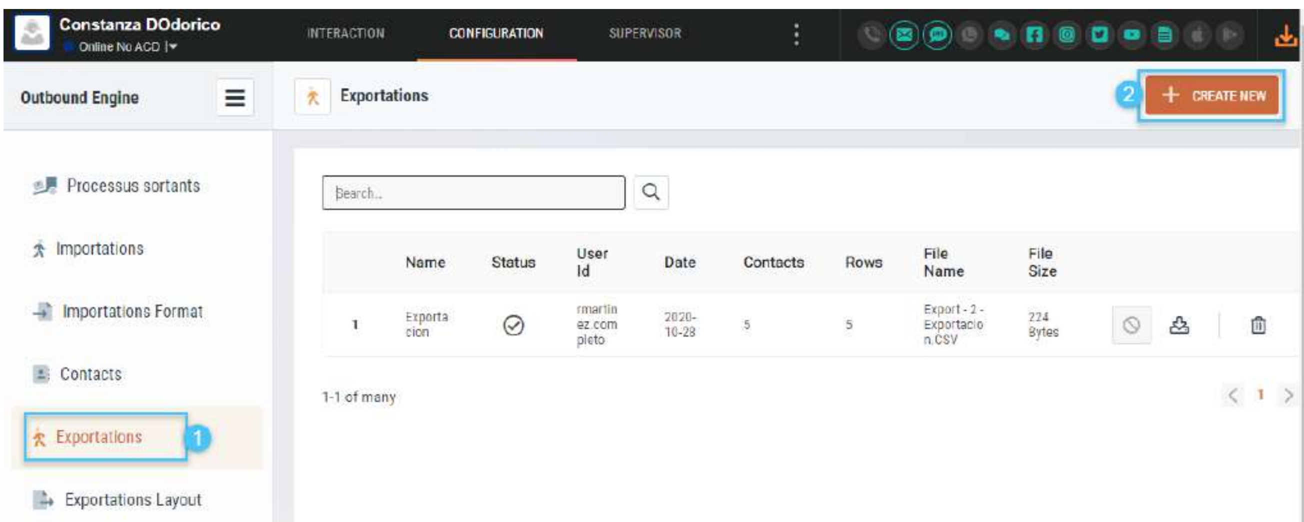
- How to create an Exportation

How to create an Exportation

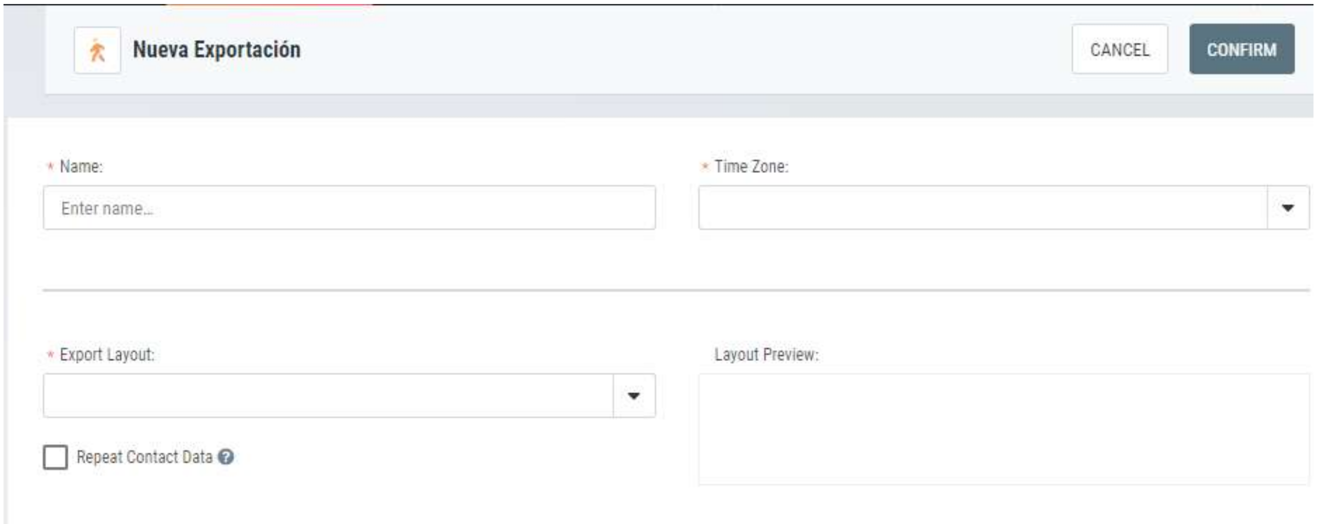
An exportation is a set of fields and values that the system makes available for further analysis. The system will export a CSV file with a set of fields defined by the administrator.
The steps to create a new Exportation are:

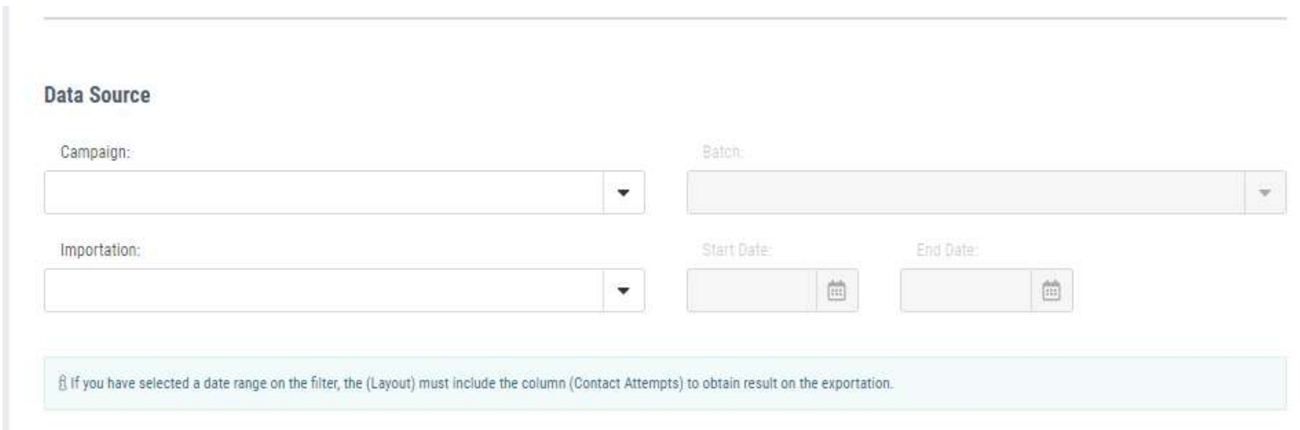
1. Access the Outbound Engine
2. Go to "Exportations" and then click the "New Exportation" button.

> The Exportations screen displays a list of all saved exportations that the outbound engine uses to export data.
> You will be able to edit, filter or delete the different Exportations.



3. The new exportation screen includes different fields that you must define:





Exportación

Name I: Indicates the name of the exported data.

Origen de datos

These fields are *optional*. If the administrator does not enter anything, the system will export all the contacts without any filter.

Campaign: indicates which campaign the contacts we want to obtain belong to (that is, they have been contacted by that campaign).

Batch: indicates the name of the batch of contacts contacted.

Importation: indicates the name of the importation of contacts to be exported (only those of the importation that are referenced).

Start Date and End Date: Indicates the period of days in which the users we want to obtain were contacted.

Format Time Zone I: Select the one appropriate to your geographical location

Diseño de la Exportación

Layout I: Indicates the column display in the exported CSV document, that is, what is put in each column. Choose a layout from the section 'Layout of exportations'.

Layout preview: Provides a preview of the selected layout.

Repeat contact data: Repeat contact custom data on each contact line.

4. Once the exportation is configured, click the “Start” button to start to export the data.

Related Articles

- Guia para la resolución de incidencias Dialer OCC
- Cómo crear una Exportación
- Cómo realizar el diseño de una Exportación
- Cómo visualizar los Formatos de Importación
- Cómo configurar Skill Dialer

Exportations layouts

Search

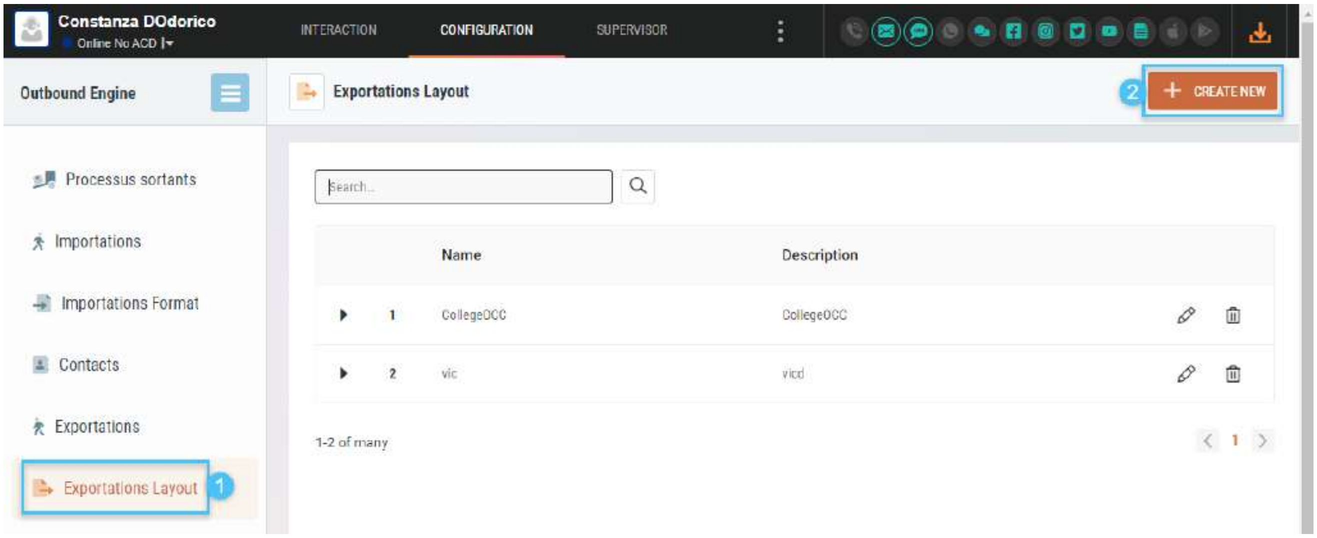
- How to layout an Exportation

How to layout an Exportation

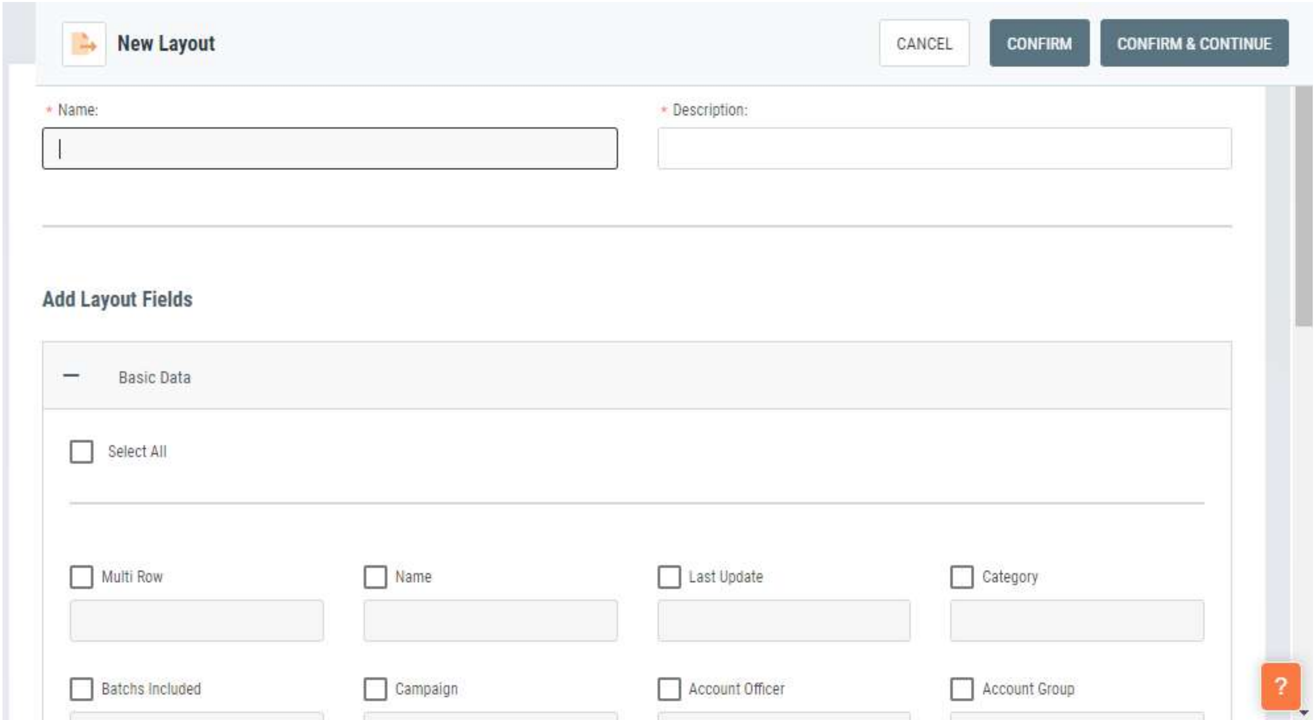
The exportation layout is basically the column display in the exported CSV document. That is, what is put in each column.

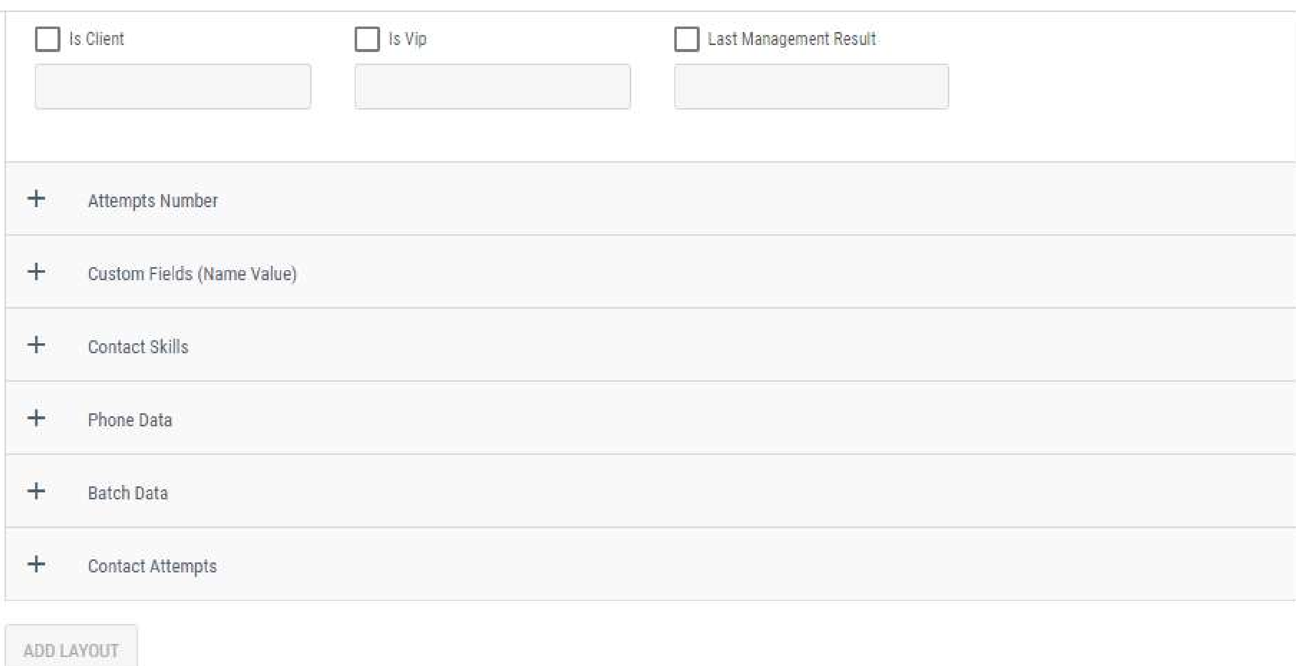
1. Access the Outbound Engine.
2. Go to the "Exportations layouts" section and then click the "New Layout" button.

> The Exportations Layouts screen displays a list of all saved layouts that the outbound engine uses to export data.
> You will be able to edit, filter or delete the different layouts.



3. The New Layout screen includes different data that you must define:





Design

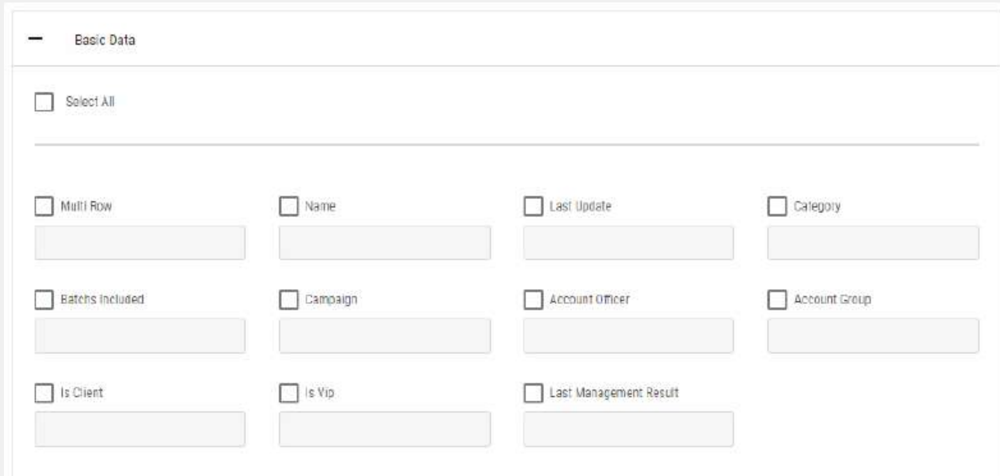
Name I: This field will identify the layout.

Description I: This field gives a brief description of the data included.

Design camps

Basic data

Use this block when you want to export some of a contact's basic information.



Multi Row: select if you want the exportation to have multiple rows.

Name: Name of the contact.

Last update: Date of the last update for each contact.

Category: If the contacts are divided into different categories, this column will show which category each contact belongs to.

Batches included: Include the batch names in the exportation file. **Campaign:** Names of the different campaigns to which the contacts belong. **Account Officer:** The name of the account link for the client in the company.

Account group: The account group is the name or number of the client's account. For example, if there is a group of agents who work with a specific product, they will be grouped into an Account Group.

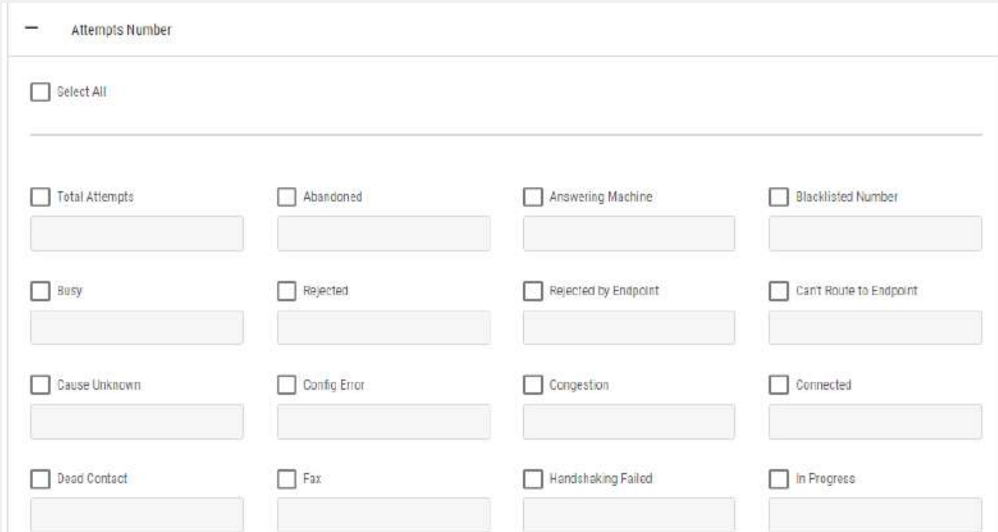
Is Client: If the contact is a client, this will be indicated in this column of the CSV document.

Is VIP: Indicates if the contact belongs to the VIP group.

Número de intentos

Use this block to export the number of attempts, separating them into different categories.

In this block you can choose to view the information on interactions with other contacts, more precisely the number of communication attempts with each contact.



Total Attempts: Number of attempts to communicate with a contact.

Abandoned: Number of calls to contact abandoned.

Answering Machine: Number of times the system tried to communicate with the contact and was answered by an answering machine.

Blacklisted number: The number is blacklisted (*"Do Not Call" list*).

Busy: Number of times the system tried to reach the contact and found the line busy.

Rejected: Number of times the system tried to communicate with the contact but was rejected.

Rejected by Endpoint: Number of times the system tried to communicate with the contact but was rejected by the endpoint.

Unable to enter endpoint: Number of times the system tried to communicate with the contact and was unable to connect the call to its destination.

Cause Unknown Number of times the system was unable to communicate with the user for unknown reasons.

Connected: Number of times the system called the contact and the contact responded.

Congestion: Number of times the system tried to reach the contact and found the line busy.

Dead Contact: The contact died.

Fax: When the system contacted the contact, a fax tone was activated.

Handshaking Failed: Number of times the system received an error because it could not negotiate the call with the carrier.

In progress: number of times that the result of the call was “*in progress*” (dialing).

Indirect Contact: Number of times the system called the contact and found another person on the phone.

Invalid use Network: Number of times the system tried to contact the telephony network and got *“Error”*.

Link Down: Number of times the system tried to communicate with the contact and the trunk was down.

Network Error: Number of times the system tried to contact the telephony network and got "*Error*".

No Answer: when the system tried to communicate with the contact, the pre-set answer time elapsed without receiving a response.

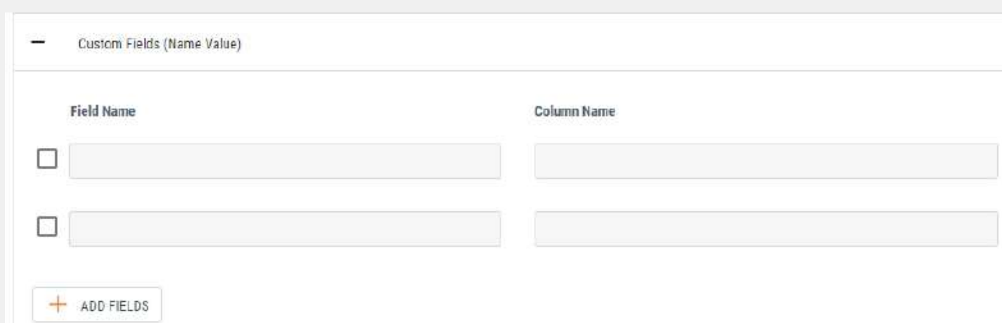
Normal Call End: The call ended normally.

Number Changed: The number of the contact the system is trying to call has changed.

Protocol Error: Number of times the system tried to communicate with the contact and got a telephony protocol error.

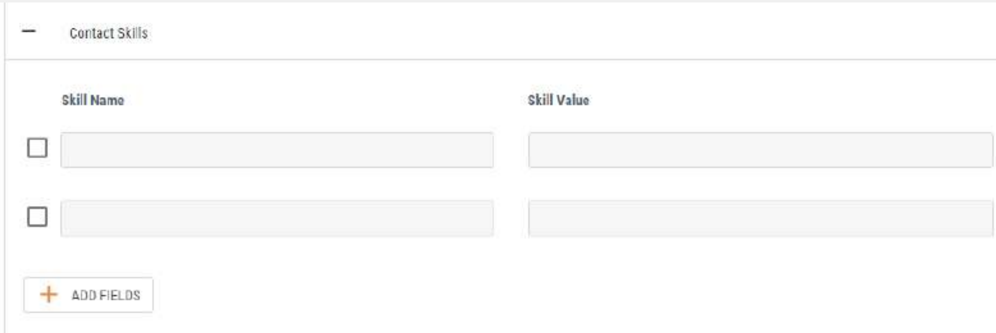
Personalizad camps (Name-Value)

Enter the names of the custom fields you want to add to the exportation here. Click the "Add more Fields" button to add as many fields as you want.



Contact skills

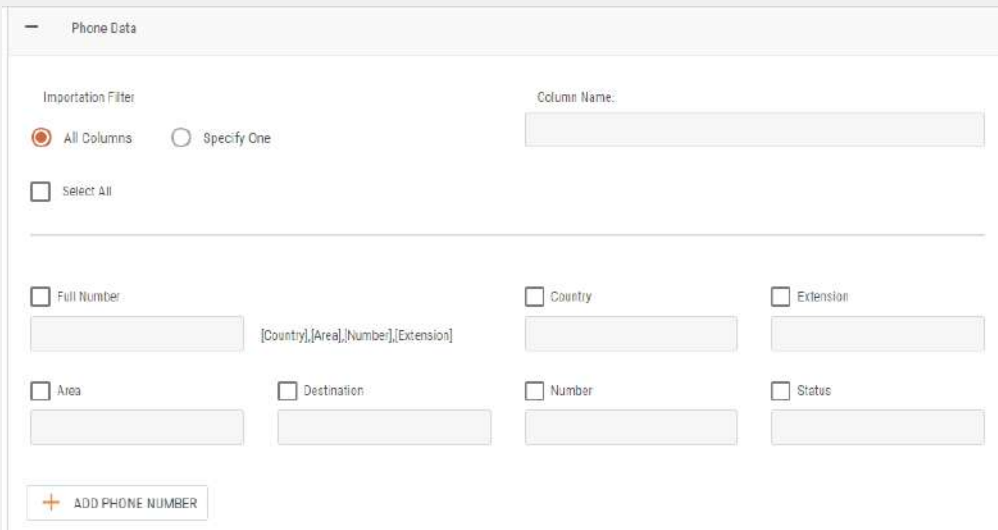
Enter the names and skill values you want to add to the exportation here. Click the "Add more Fields" button to add as many fields as you want.



Phone Data

This block exports the different phone numbers of each contact.

Click the "Add more Fields" button to add as many fields as you want.



Full Name: Displays the full phone number of the contact, including country, area, number, and extension.

Country: Country code for phone numbers. **Area:** Area code for phone numbers. **Number:** The phone number itself.

Internal: If applicable, the internal extension number.

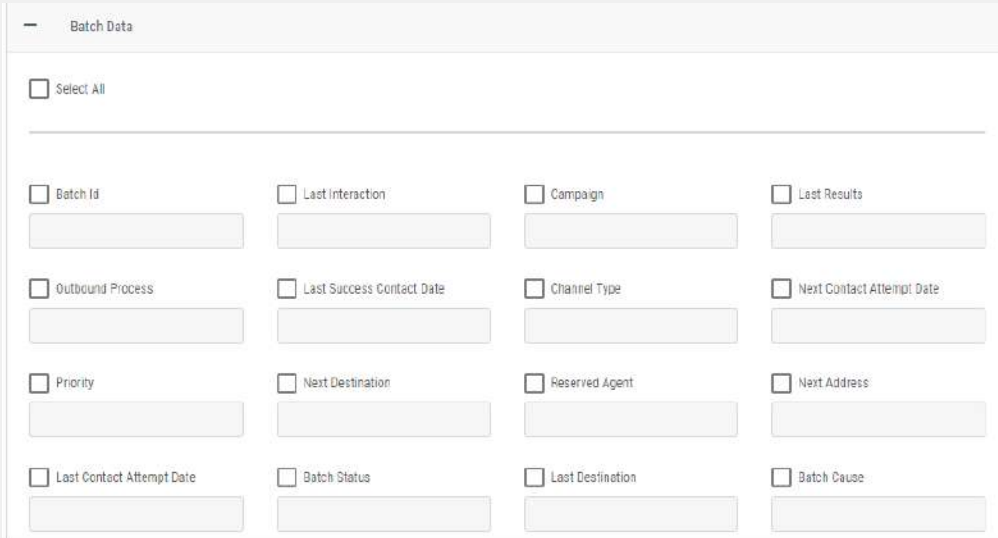
Destination: Indicates the phone type, for example: home phone, work phone.

State: Indicates if the phone is enabled or disabled.

Batch Data

Use this block when you need to export contact data for a certain batch of contacts.

This block will contain the data of the calls to each contact in the batch, the time of the call, the result, etc



Batch Name: Indicates the Batch Name to be exported and the name of the column to which it will be exported.

Campaign: Indicates the name of the campaign to be exported and the name of the column to which it will be exported.

Outbound process: Indicates which outbound process the batch is linked to. The exportation will contain the name of the outbound process.

Channel Type: It will export the class of outbound channel that was used to contact the client (e.g. SMS, Fax).

Priority: Indicates the priority of the contact in the batch in question.

Reserved Agent: If there is an agent assigned to the contact, this field will export the name of that agent in the CSV document. If the field is empty, then there is no reserved agent for that contact.

Last contact attempt date: indicates the date on which the system last tried to communicate with the contact, within this same batch.

Last Destination: Exports the last destination where there was interaction with the contact. *Home, office, cellular phone, etc.*

Last address: Exports the last number where there was interaction with the contact.

Last interaction: Indicates when the last interaction for this batch occurred.

Last Results: exports the last result of a communication attempt with this contact.

Eg: Busy.

Last successful contact date: Indicates the last date the system was able to successfully communicate with the contact.

Next Contact Attempt Date: Indicates the date when the system will try to communicate with the contact again.

Next Destination: Exports the next destination to try to communicate with the contact.

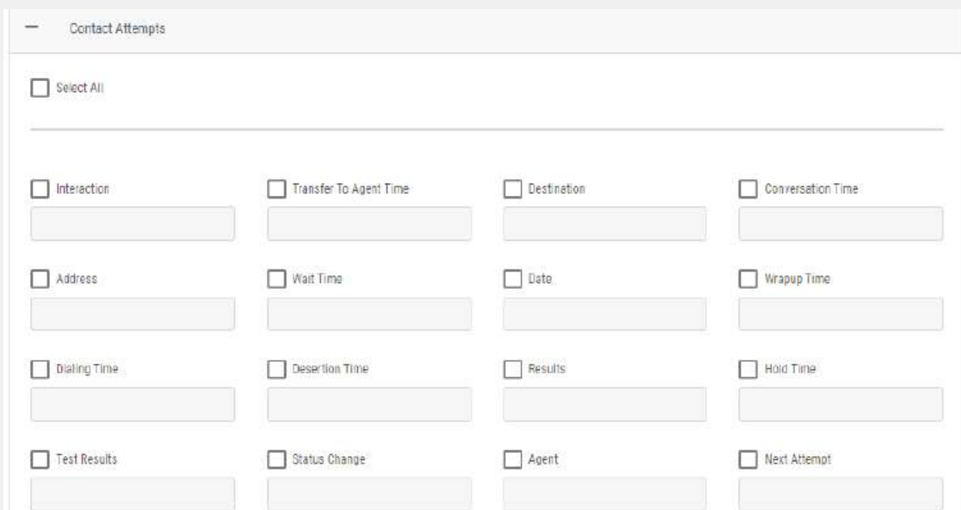
For example: Home, Office, etc.

Next address: exports the next number to try to find the contact.

Batch Status Batch Cause

Contact Attempts

Use this block to export the history of communication attempts with each contact.



Interaction: Indicates the Identifier of the interactions that were attempted with the contact.

Destination: Indicates to which destination the call was made (*home, office, etc.*).

Address: Indicates which number the system called.

Date: Indicates the date of the different communication attempts.

Dialing Time: Indicates the amount of time the dialing took.

Results Test Results

Agent: Indicates the ID of the agent who participated in the interaction.

Duration Time: Indicates the total duration of the call, including wait time, transfer time, etc.

Control Agent Time: Indicates the amount of time that elapsed between when the system communicated with the user and when an agent took the interaction.

Transfer time: indicates how much time elapsed during transfers of the call from one agent to another.

Ringing Time: Period between the moment the system communicates with a phone and the call is answered.

Transfer To Agent Time: The time elapsed between when the system established a connection with the contact and transferred the call to the agent.

Conversation Time: Number of minutes the agent spoke with the contact.

Wait Time: Total time spent waiting (*including wait time, transfer time, etc*).

Wrapup Time: Amount of time between when the call ended and the agent performs call completion tasks.

Desertion Time: Indicates how much time elapses from when the system communicates with a contact and the contact answers the call, until the contact hangs up due to the system not assigning the call to an agent.

Hold Time: Amount of time the contact spends with the call on hold.

Status Change

Next Attempt: Date and time of the next attempt scheduled.

Answer Time

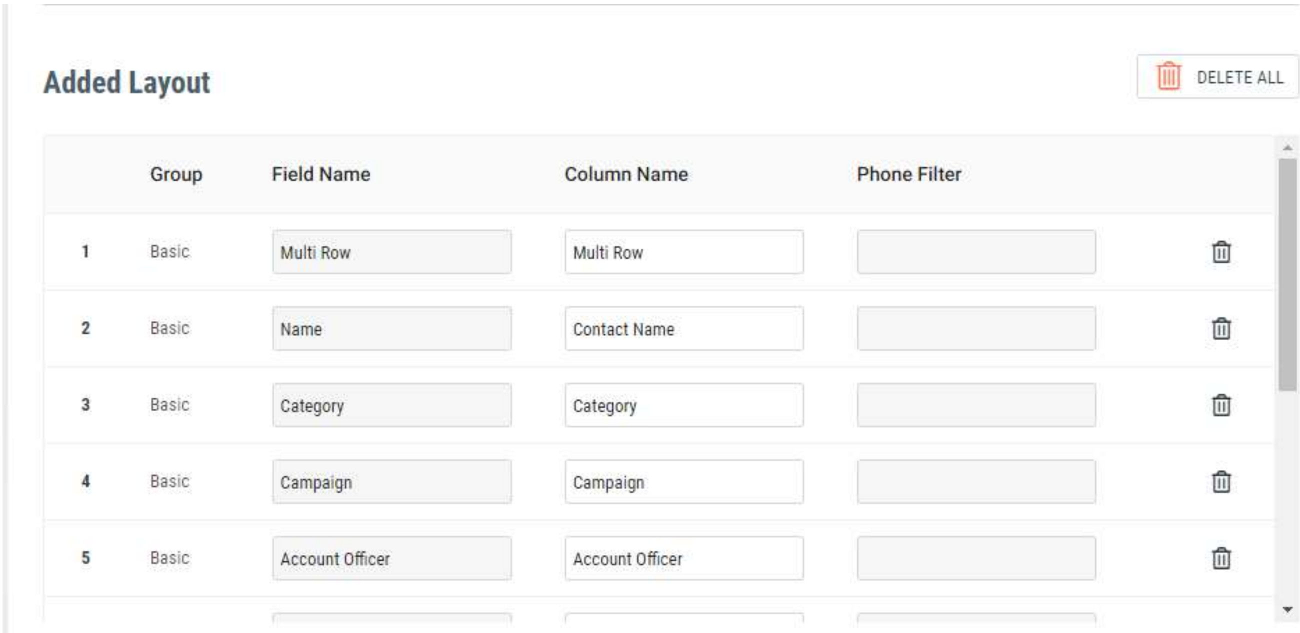
IVR Time: duration of the IVR processes for each call (*if there are IVR processes* config ured).

Requeued Time: Indicates how long the call spends as a re-queued call.

Ring Back Time

Click the “Add” button to add fields to the layout.

4. Drag and drop the fields to put them in the order that you think is most effective when exporting.



5. To save the Exportation Layout generated, click the “Create” button.

Related Articles

- How to layout an Exportation
- How to create an Importation
- How to set up dialing by percentage of batch
- How to recycle Batches of Contacts
- How to create Contacting Rules

Skill Dialer

Search

- How to set up Skill Dialer
- How to create an import format with Skill Dialer
- How to create an export format with Skill Dialer

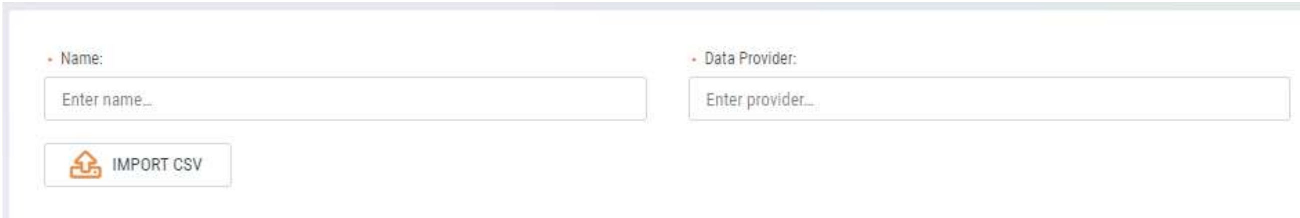
How to set up Skill Dialer

Configuring the dialling engine using "Skill Dialer" will allow you to assign contacts to agents depending on the associated skills of each one; that is, after creating the skills and assigning them to the agents and the campaign, you can create import formats by associating these skills with the contacts that are going to be called.

The priority for assigning the called contact will be for agents who have the associated skill(s); in this way, you will be assigned to an agent who meets the required skill, if available; otherwise it will be on hold until at least one agent who meets the required skill is released.

To set up Skill Dialer you must create an import including the skills. To do this:

1. Within the Outbound Dial Engine settings, go to Imports:
2. Set up a new import:



Name: name of the import.

Data provider: name of the company or person providing the contact information.

File to import: by clicking the 

button, the administrator will be able to browse the files on your PC, and choose the correct CSV file for import.

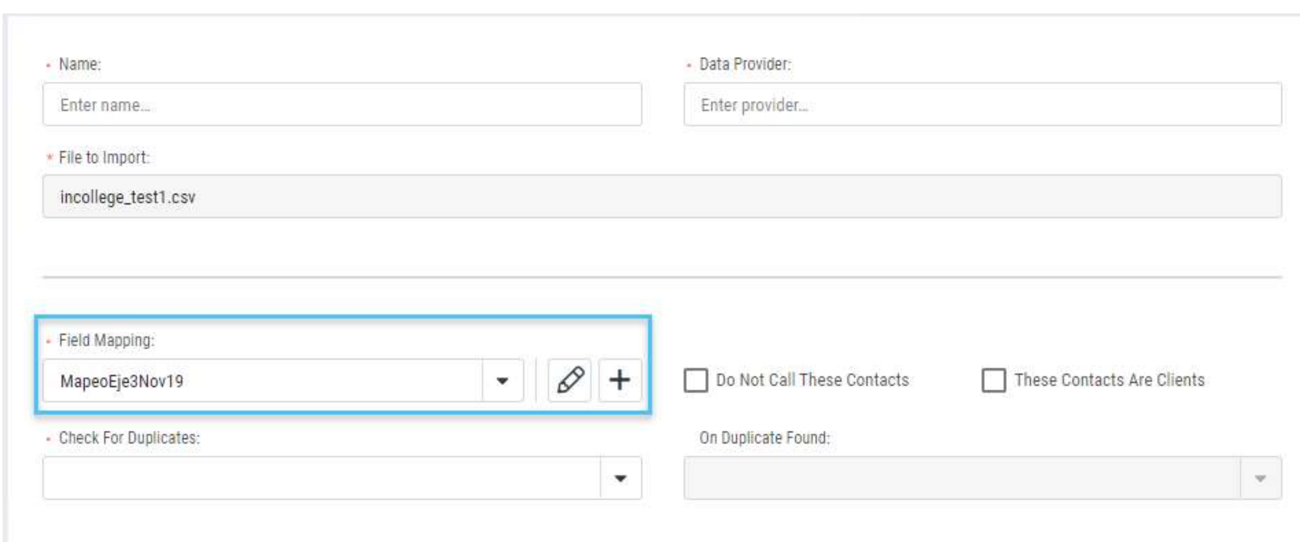
The CSV file to be imported should be a list of contacts, for example, with information such as identifier, name, phone, etc. Additionally, in order to configure the "Skill Dialer", you must have information relating to the weighting of the skills for each contact, which will be taken into account to assign the contacts to the agents. An example of a base in excel is as follows:

IDContact	Name	Phone	Skill1Spanish	Skill2English	Skill3Empathy	Skill4Resolution
1	contact1	4145750946	1			
2	contact2	4145750947		1		
3	contact3	4145750948			1	
4	contact4	4145750949				1

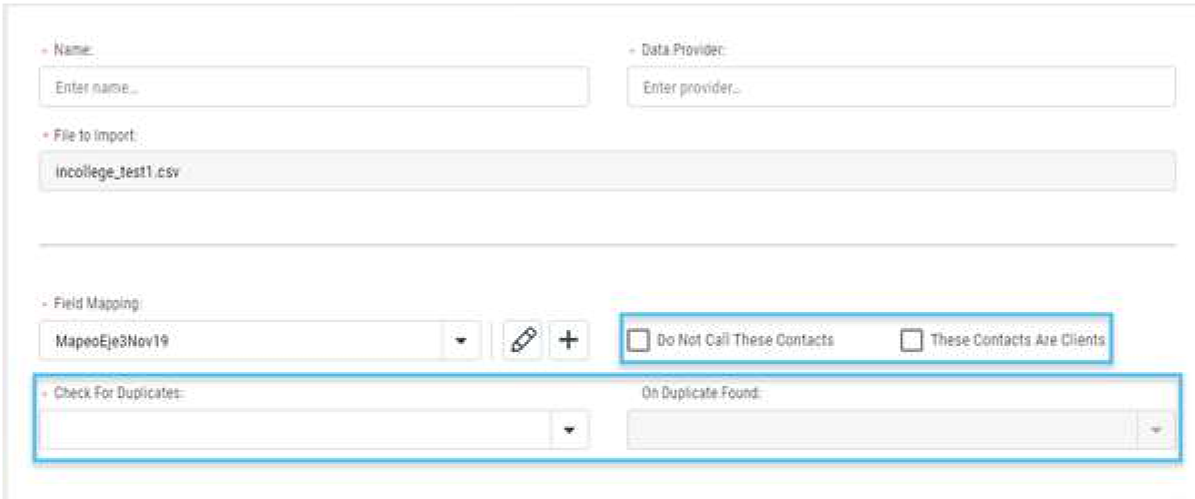
In this case, the priority to assign the contact "contact1", is to get an available agent that has the skill "Skill1Espanol" associated with it; as well as the priority to assign the contact "contact2", is to get an available agent that has associated the skill "Skill2Ingles", and so on. In the case of not finding available agents with the specified skill, it will be on hold until at least one agent that meets the required skill is released.

To learn how to assign skills to agents and campaign, continue reading: "How to associate skills with a user" and "How to create a Campaign".

3. Once the file has been uploaded, you must select from the drop-down list the field mapping (import format) to use:



4. Indicate what actions to take in case of duplicate contacts, and other additional actions:



Duplicate check: check if the imported CSV file contains contact records that have already been included in the database through previous imports. The options with the following:

- By contact id: it will search for duplicates by the "contact id" field.

- By contact phone: it will search for duplicates by the "phone" field.

- By phone and name: a record will be considered duplicate only if the "name" and "phone" fields are identical.

If there are duplicates: actions to take in the case of finding duplicate records. The options are as follows:

- Replace with new one: replaces the old record with the information of the new import.

- Keep current contact: this keeps the old record containing the information from the previous import.

- Append new to current: when the system finds two contacts with the same ID, it keeps the current information as the main record and adds the information from the new import, without deleting any repeated information.

- Append current to new: when the system finds two contacts with the same ID, it saves the new information as the main record and adds the information from previous imports (without deleting any repeated information).

Do not dial these contacts: if this box is checked, the system will add the selected contact group to the "Do Not Call" list.

These contacts are customers: if this box is checked, it means that the contacts are already customers of the company. In such a case, if the contact is on a "Do Not Call" list, they will be called anyway.

5. Click the **"Start"** button to start with importing the contacts.
6. If you want to cancel the import, click the **"Cancel"** button.

Related Articles

- User search
- How to set up Messenger messaging
- How to associate a YouTube account
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- How to associate an application from the App Store

How to create an import format with Skill Dialer

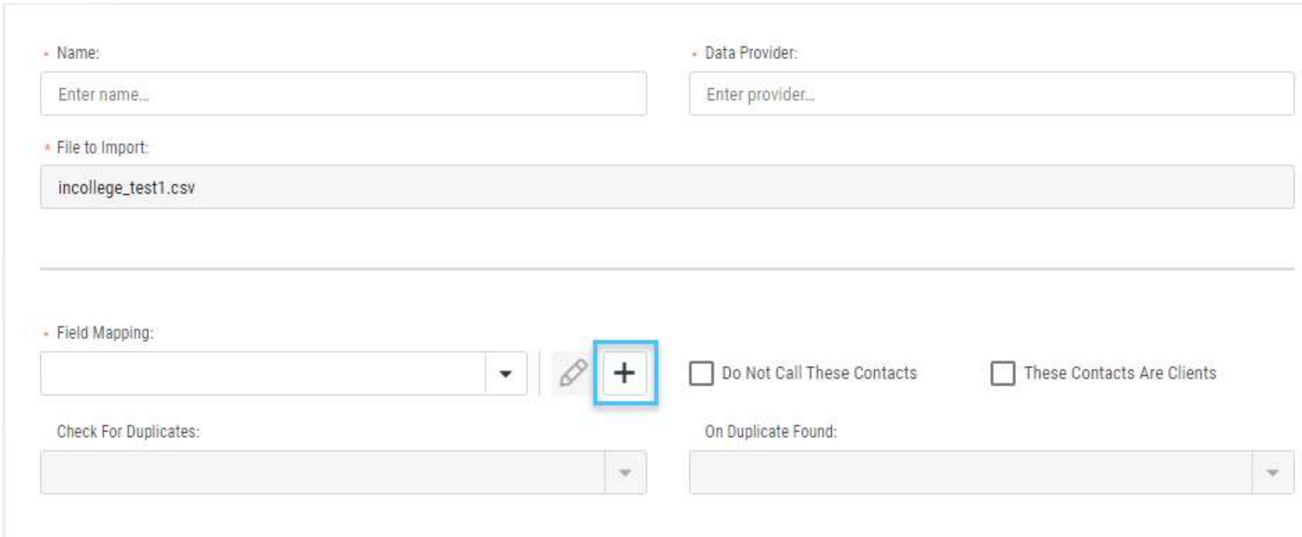
The import process, by adding skills to the contact upload, differs in some ways from a normal import.

First, in order to perform an import with skills in the upload, the skills must have been previously created from the admin interface.

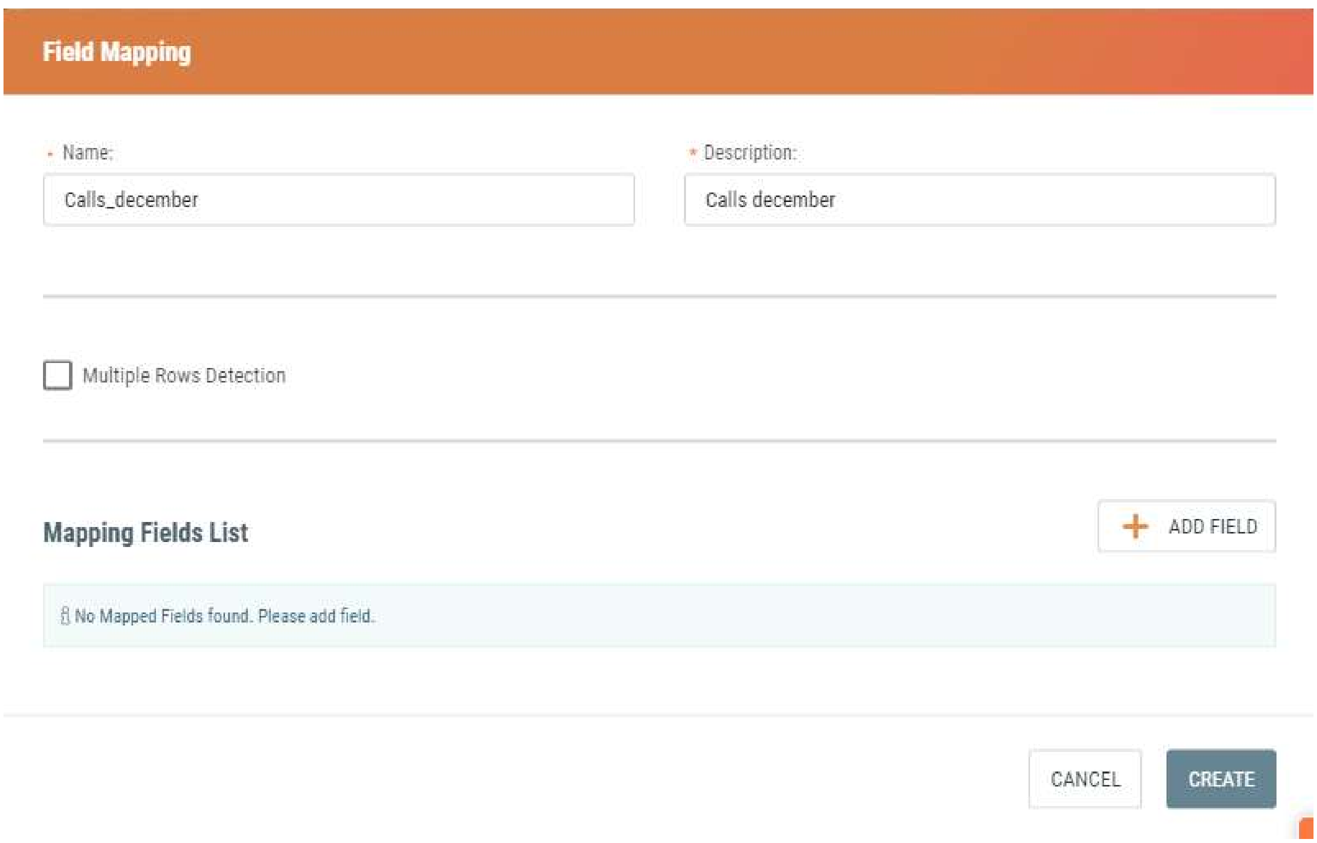
When importing contacts with skills, it is understood that for each particular contact, one or a series of associated skills will be taken into consideration, for example, an English-only contact should be associated with a skill representing the use of English, so that the Dialling Engine and ACD can jointly connect their call with an agent who has that ability, as long as it is available.

After starting an import as detailed in "How to configure Skill Dialer" and after assigning a name and a data provider to the import and the file that has the data:

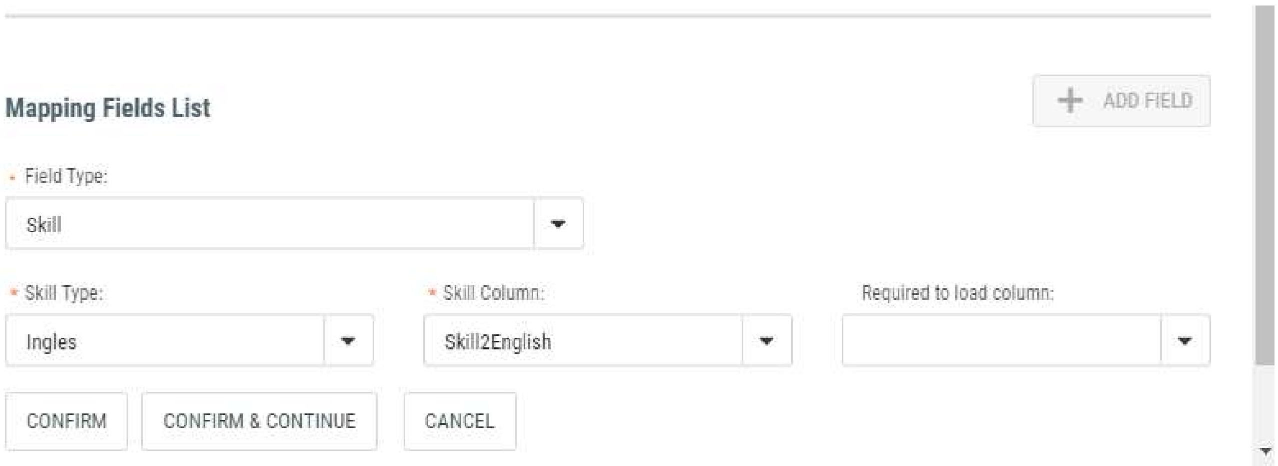
1. Within the new import, create a new field mapping:



2. Fill in the name and description of the new format, and add the basic fields that apply, such as ID, name, and at least one phone number:



3. Adds a new Skill field. The system requires at least two fields:



Skill Type: selects the system skill associated with this column.
Skill Column: selects the column from which the value will be obtained for the skill selected in Skill type.
Required to load column: indicates whether the contact's ability should be loaded into memory to be called or not. For a column to be considered under this criterion, it must have a registered value greater than zero.

4. Repeat step 3 as many times as necessary to cover all of the Skills that apply to the case.

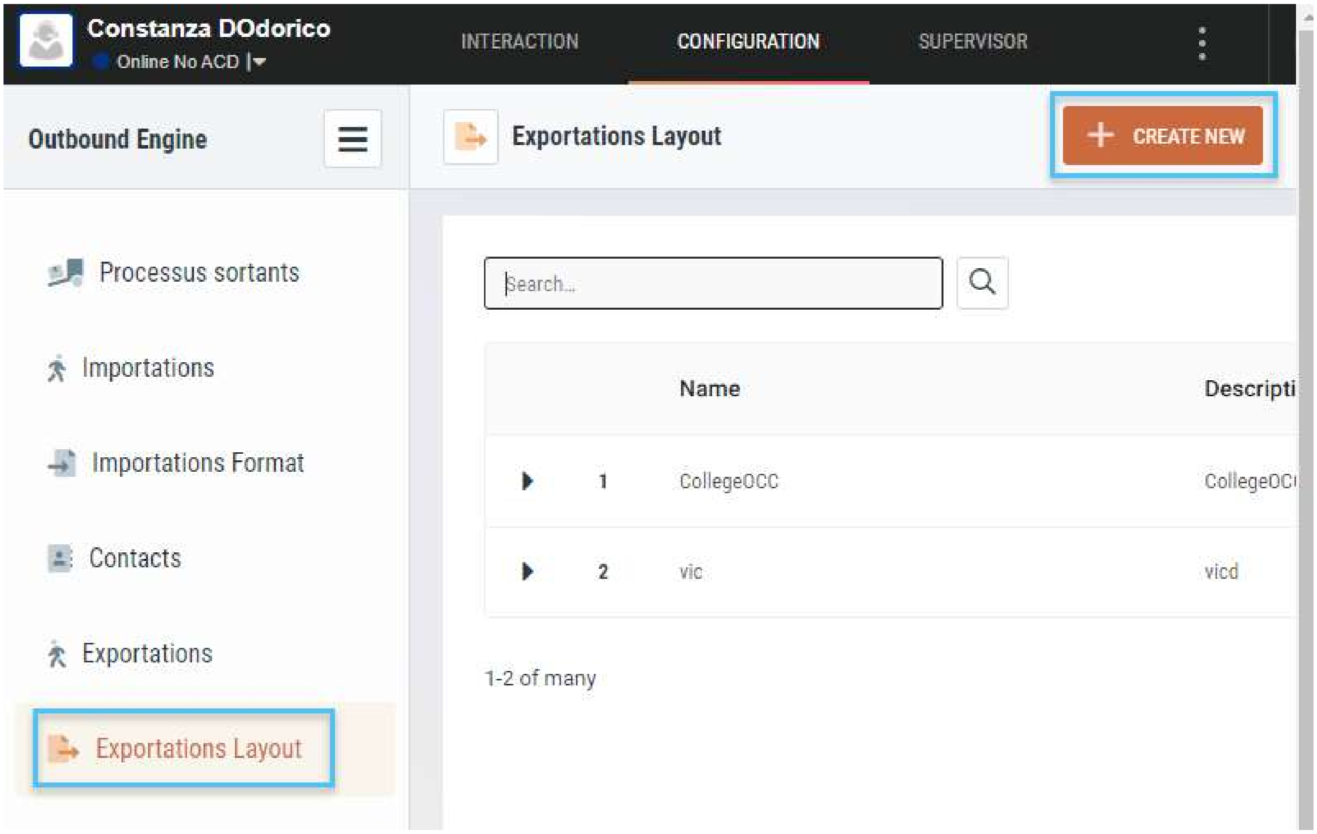
> **NOTE**
> The Global Skill column should NOT be assigned as “Upload Required Column”, as this skill is used for assigning overflow agents when the connected contact cannot assign an agent with the Skill with which it was loaded.

5. Click the “Save” button to save the import format:

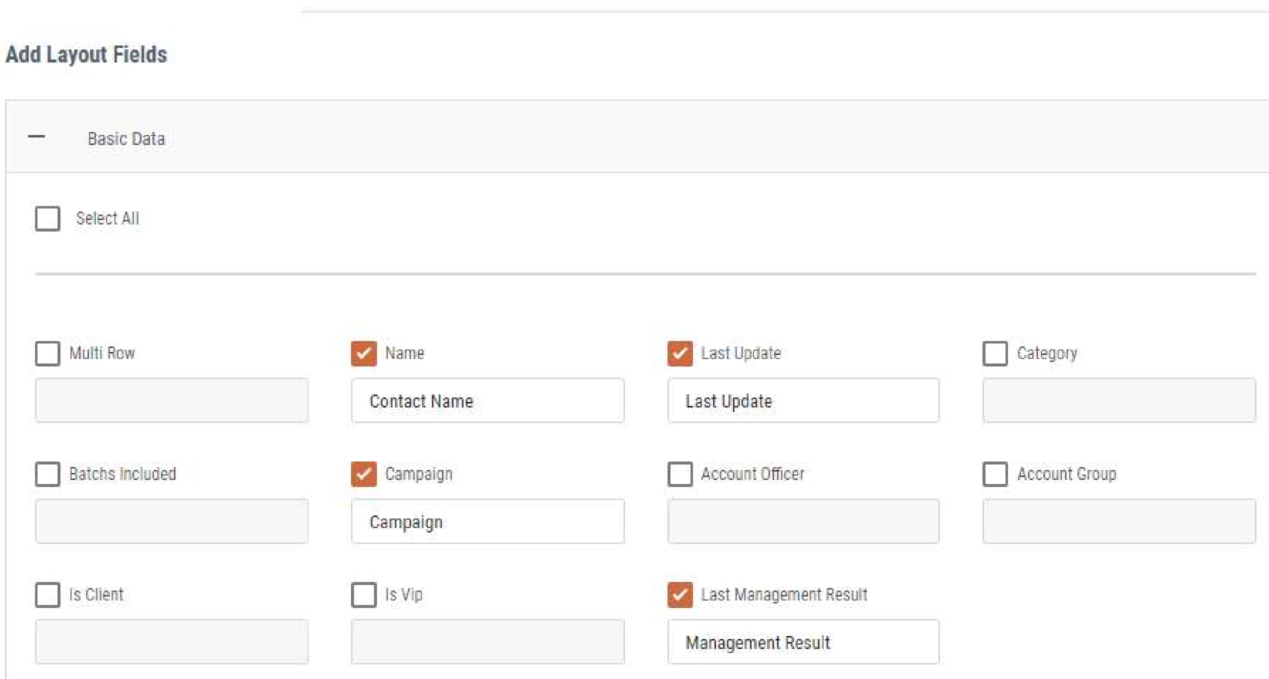
How to create an export format with Skill Dialer

Export formats allow you to predefine specific column series to obtain data from the import base and dump them into a CSV file automatically and without having to directly query the import base.

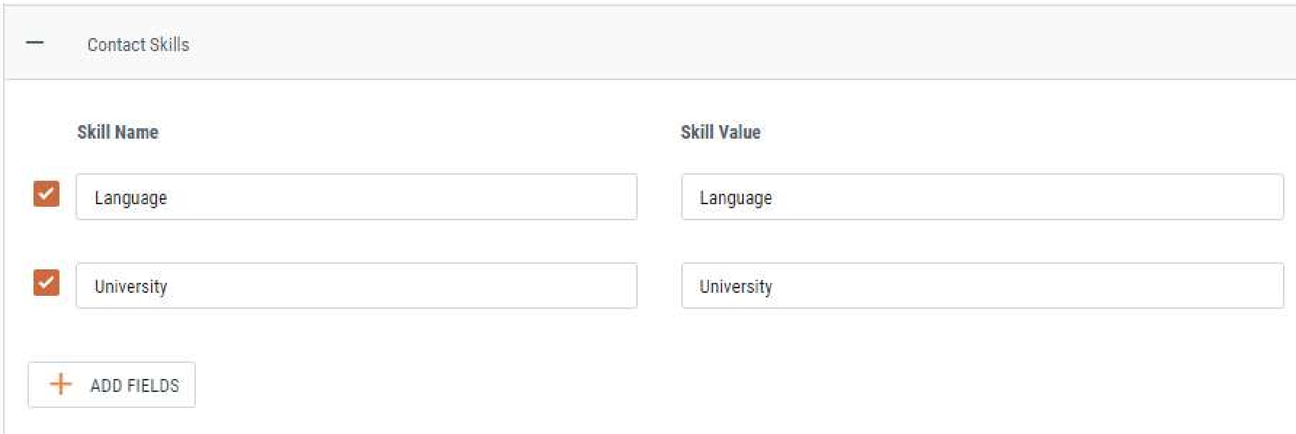
1. Go to the "Export Design" section in the side menu and click the "New Design" button:



2. Complete the name and description fields as appropriate.
3. Select the corresponding fields from the Basic Data, Number of Attempts and Custom Fields sections:



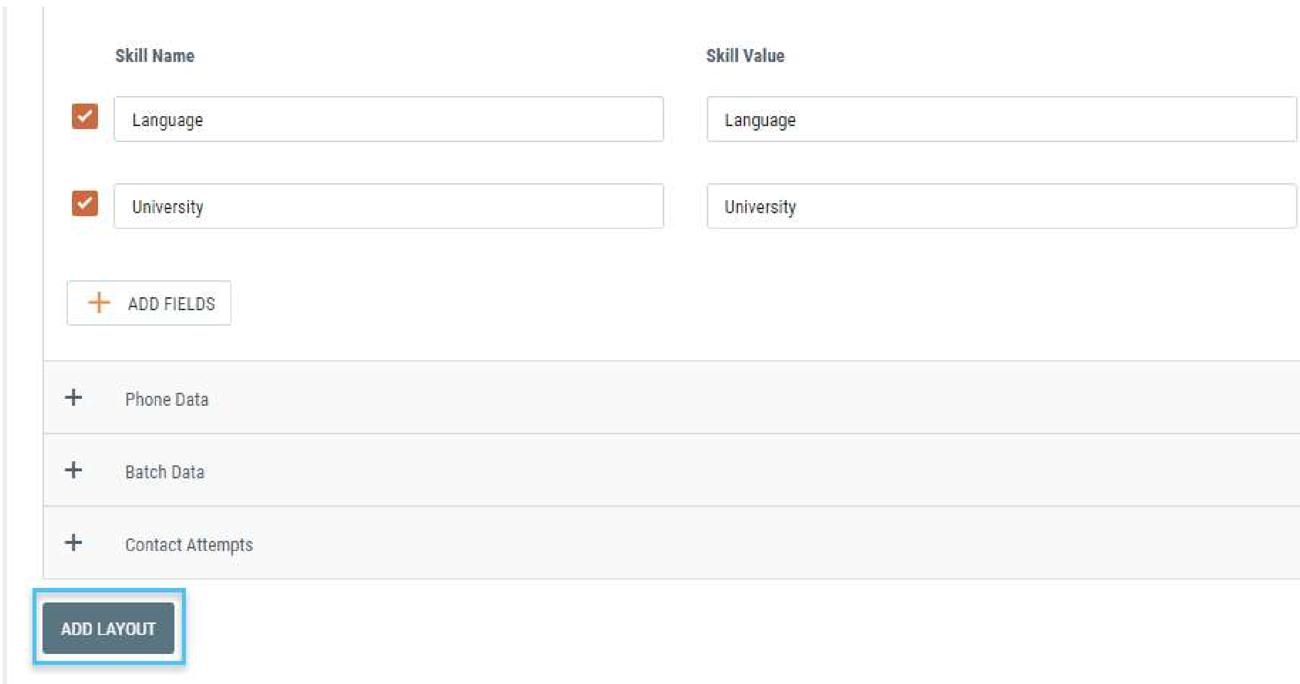
4. In the Contact Skills section, you can select to add Skill columns that have been imported to your Export layout. Check the box to enable aggregation of a field and define:



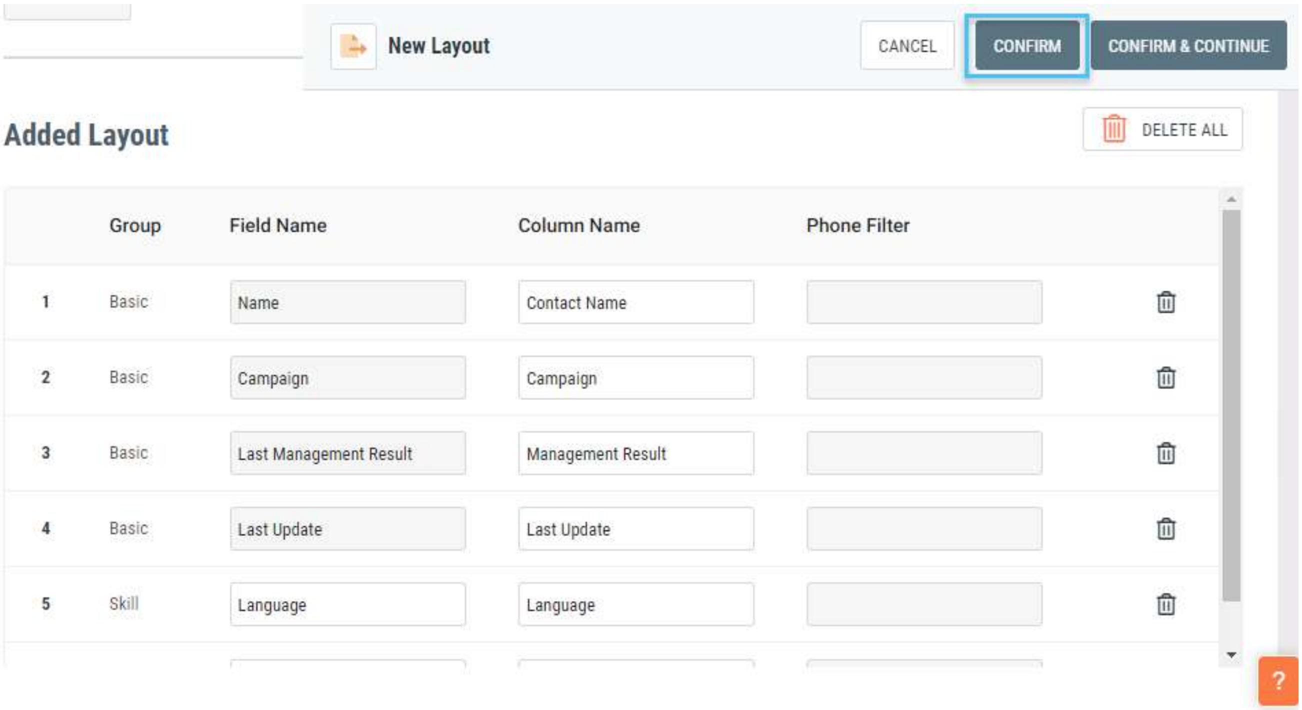
Skill Name: the exact name of the Skill column as it was imported.
Skill Value: name you want the column to have in your export. It can be the same as the original column or a different one.
Repeat the process as many times as necessary for the number of columns you need.

5. Select the rest of the corresponding fields with the following categories as indicated in step 4.

6. Click the "Add" button to add all the selected fields to the export format. The system will display them in the table below.



7. Click the "Create" button to save the new Export Format:



The new format will be available for any data export instance that is performed.

What is the role of an OCC administrator?

The role of an OCC administrator is to manage a series of basic resources that allow the operation of one or more campaigns to begin.

Key among these basic resources are:

- Accounts
- Channels
- Users
- Campaigns
- Groups

Once you have created your first campaign, with your accounts and channels enabled and users assigned, access the Getting Started Tutorial in Attending to Interactions , to learn how to handle the different interactions that you can send through the accounts you have set up.

What is advanced OCC administration?

Advanced OCC administration consists of configuring a series of elements and parameters that allow the operation to be optimized.

The following elements stand out:

- Custom States: Allows new agent activity states to be added and managed.
- Skills: Improves productivity based on the distribution of calls by skill.
- Disposition Codes: Allows the classification of the cases that the agents handle with the clients in the contact center
- Attention Capability: Allows the configuration of the maximum number of interactions allowed on each channel.
- Attention Levels: Allows an order to be maintained in the management.
- Tickets: Managing tickets allows you to attend requests and claims in a practical, orderly and efficient way.

Campaigns

- What is a Campaign
- How to create a Campaign
- How to edit a Campaign
- How to delete a Campaign
- User Settings
- Schedules
- CC integration
- Disposition Codes
- Labels
- Notifications
- Attention Levels
- Canned Messages
- Rules
- Accounts/Channels

What is a Campaign

Conceptually, a campaign is a set of actions and resources that are applied to achieve a certain business objective. Thus, a contact center may have campaigns associated with telemarketing, lead capture, support, customer service, recovery, promotions, etc.

According to the business criteria, each campaign will process interactions from different channels (email, Facebook, Twitter, phone, web forms, webchat).

You can have "omnichannel" campaigns, telephone-only campaigns, campaigns which will only attend digital channels, and campaigns that need to provide attention to some but not all possible channels.

The channels that will be made available and the accounts of each channel type that will be associated with each campaign will depend mainly on the defined business strategy.

When we refer to campaign resources, we are mainly talking about the agents who will be designated, by their profile and skills, to attend to each campaign, attention levels and also the users who will carry out administration, monitoring, implementation tasks, etc. to meet the defined campaign objective.

Each campaign will have defined its own service levels and thresholds, schedules and days of operation, disposition codes, labels, templates and canned messages.

To start defining your campaign, read: "How to create a Campaign".

Related Articles

- User search
- How to set up Messenger messaging
- How to associate a YouTube account
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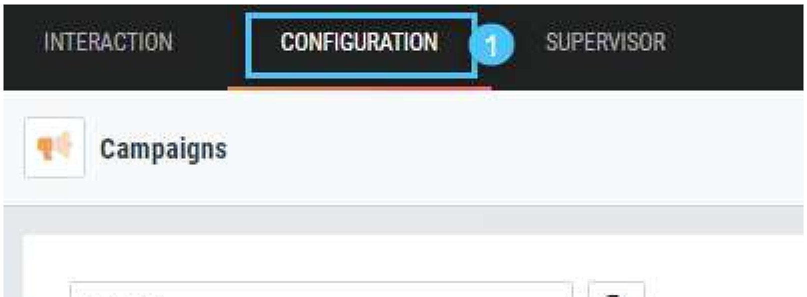
- How to associate an application from the App Store

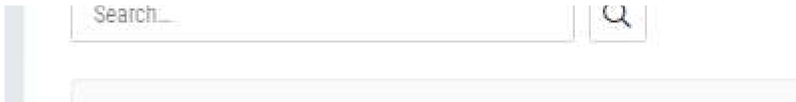
How to create a Campaign

To start the operation of your Contact Center, you must first create the campaigns to which you will associate the communication channels. For this you must have the basic information, such as name, description and time zone.

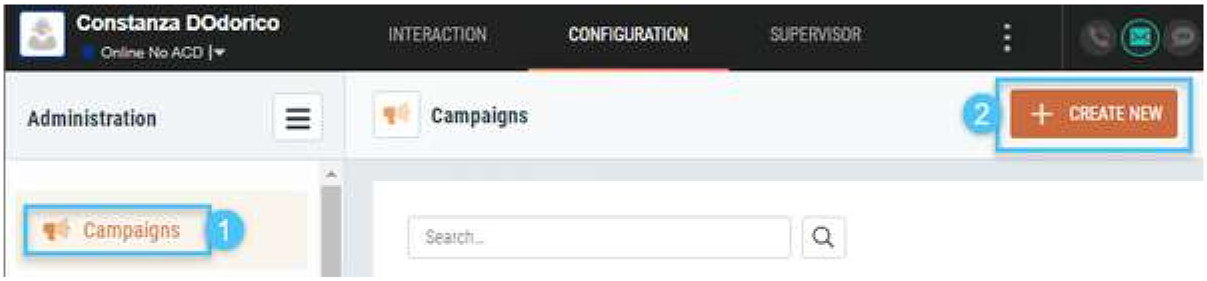
To create a campaign:

1. Go to the "Configuration" tab:





2. Click on the "Campaigns" section  and then *click the button* ***"Create New"***  :



3. Enter the required data:

> **Name:** unique name that will identify the campaign in the system.
>
> **Description:** description of the campaign.
>
> **Time zone**: in addition to being an information field, the "Time zone" field is important for schedule data reflected in reports, historical data and recordings. It is important to specify it correctly for each campaign.

4. After completing all the required fields, c*lick the* ***"Confirm"*** button to continue.
5. To cancel the operation without saving the changes, press the **"CANCEL"** button.

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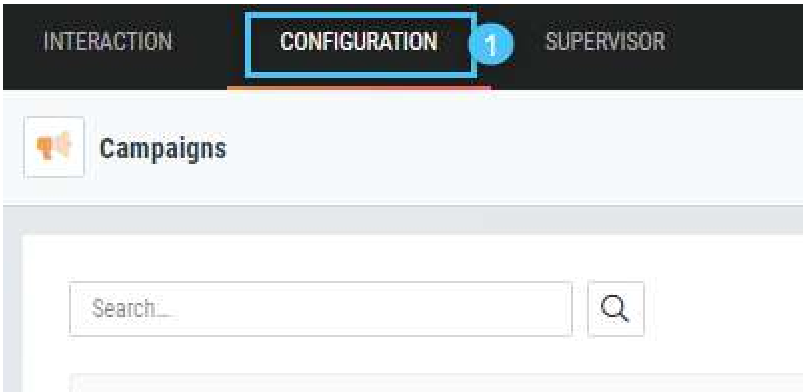
How to edit a Campaign

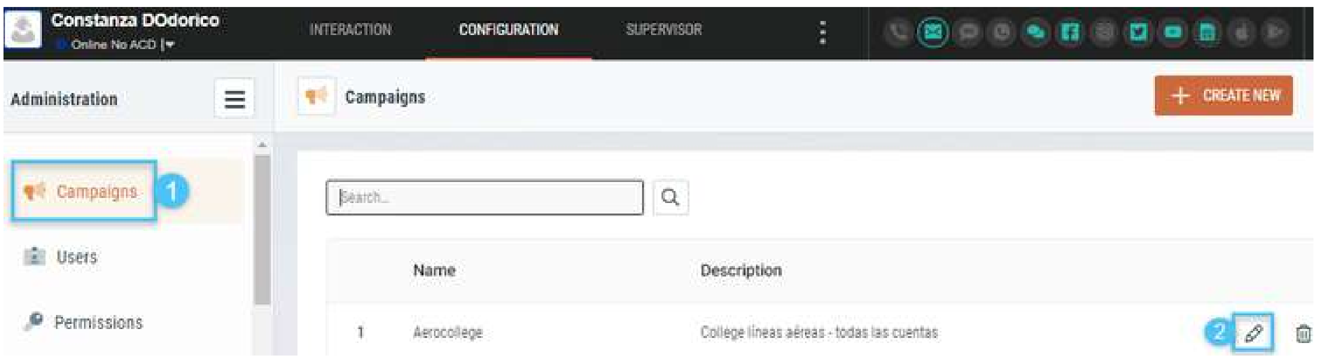
After creating a campaign it is possible to edit it to make modifications or adjustments to it. These modifications will have an immediate effect on the configuration of the campaign.

To edit a campaign:

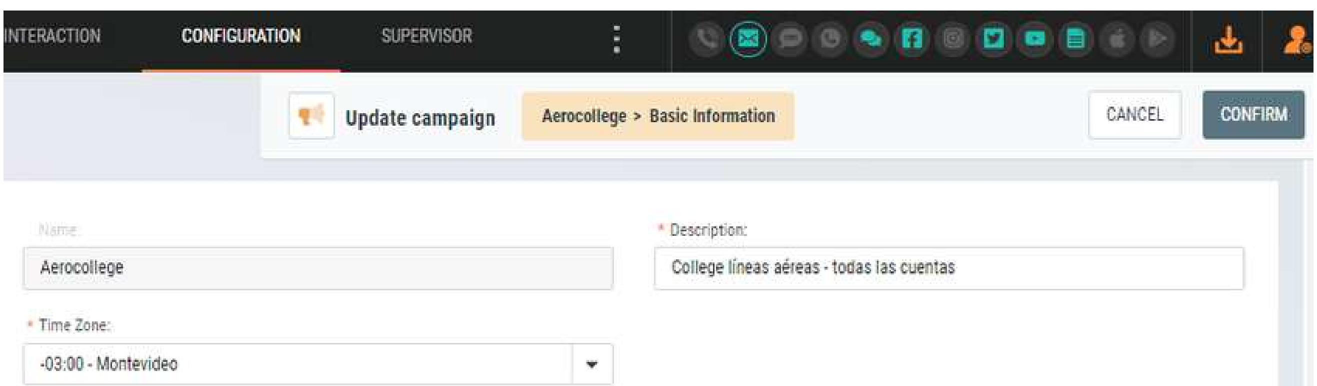
1. Go to the **"Configuration"** tab:



2. Click on the "Campaigns" section  and press the "Edit" button of the campaign to edit  :



1. The campaign configuration window is displayed and from here you can make the required adjustments and/or modifications:



The identifying name of the campaign is the only data that cannot be edited.

Related Articles

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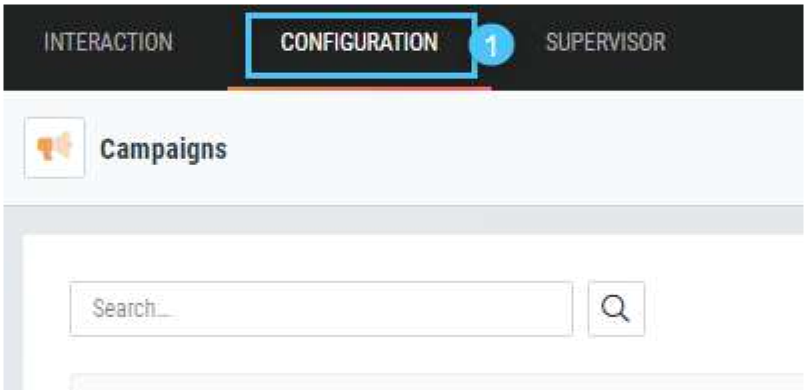
How to associate an application from the App Store

How to delete a Campaign

You can easily delete a campaign in just a few steps. It is important to note that when deleting a campaign, all associated settings will be lost, so you must be very sure of the impact it will have on your operations.

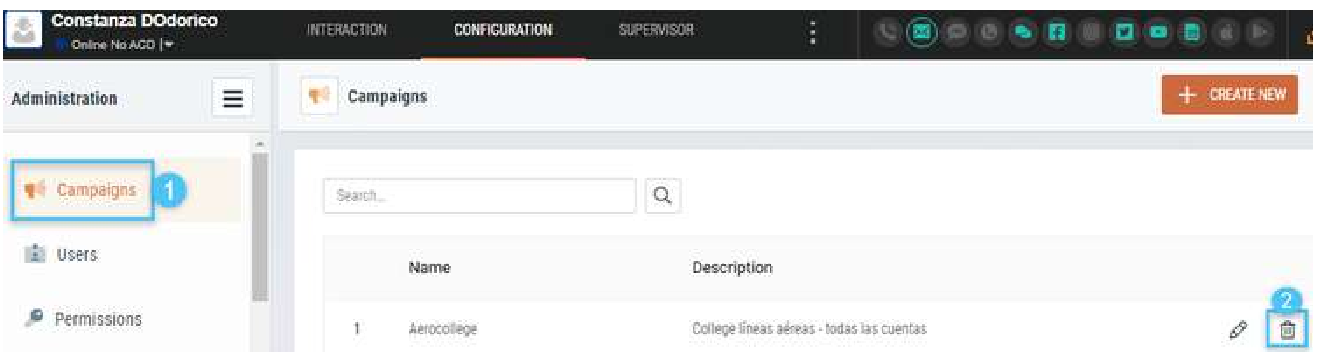
To delete a campaign:

1. Go to the **"Configuration"** tab:

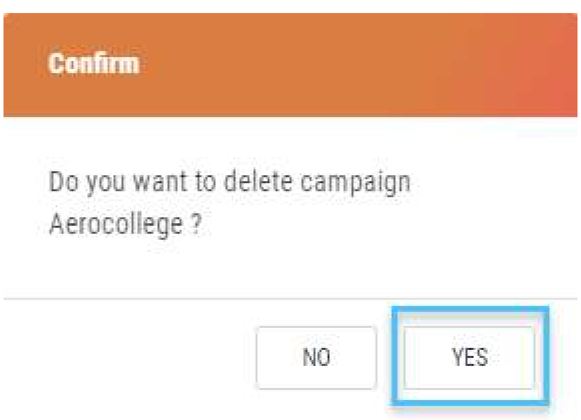


You do not need to disassociate users, accounts, etc., from the campaign in order to delete it.

2. Click on the **"Campaigns"** section 1 and then click the ***"Delete"*** button of the campaign you want to delete 2 :



3. *Click the* ***"Yes"*** *button* to confirm you want to delete the campaign.



4. A message confirming successful deletion of the campaign is displayed:

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User Settings

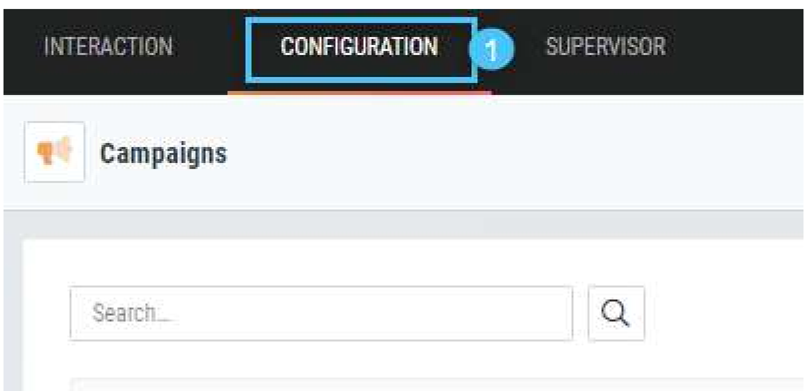
- How to assign groups to a user
- How to assign users to a campaign
- How to overwrite a user's attention capacity for a specific campaign
- How to overwrite permission groups for a user on a specific campaign

How to assign groups to a user

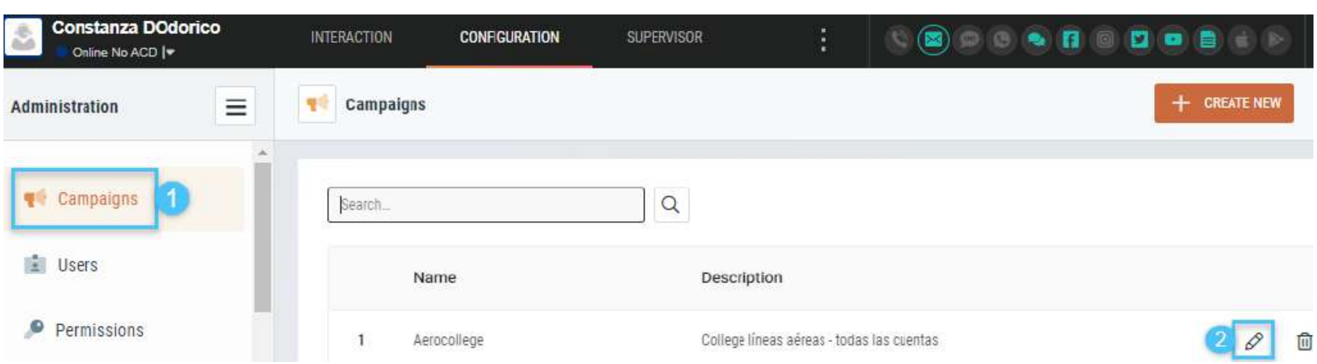
You can associate groups to a user that has supervison permissions in order to enable it to follow up and monitor the agents that belong to such groups. You have the possibility to make it in a simple way from the campaign edition panel. It is important to point out that the users with supervision permission that do not have associated groups will be able to monitor all the campaign's users.

To assign groups to a user you have to:

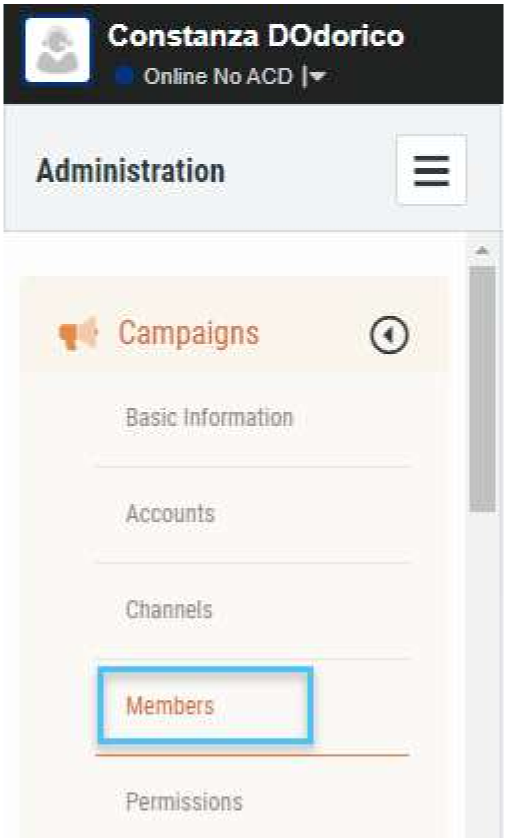
1. Go to the "Configuration" tab:



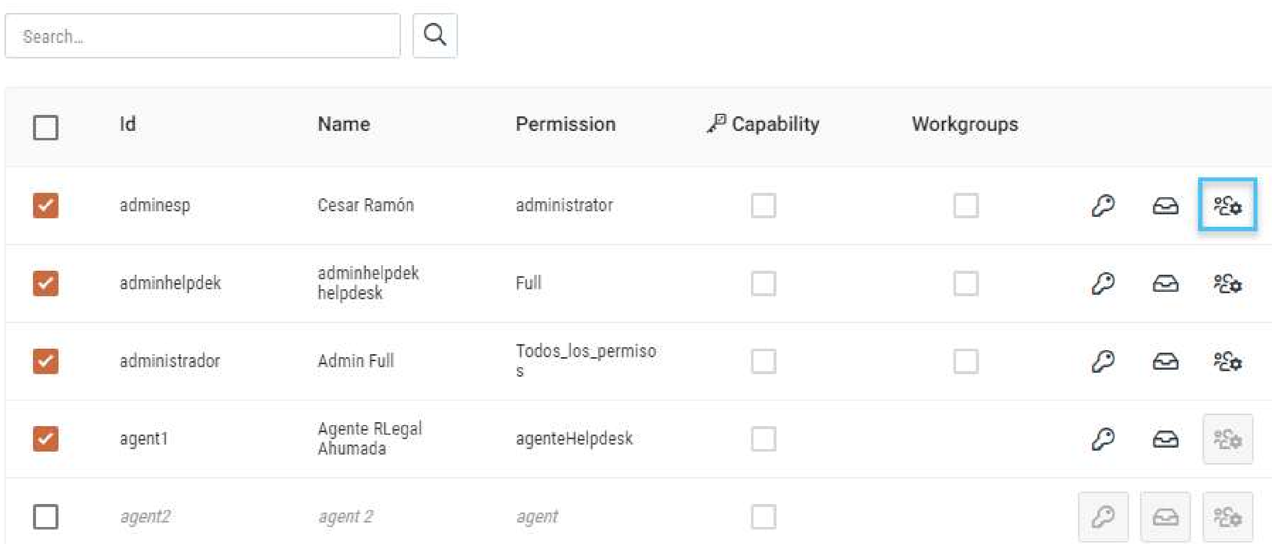
2. Click in the "Campaign" section  and then press the "Edit" button of the campaign to which the user belongs  :



3. Click the campaign's "Users" section:



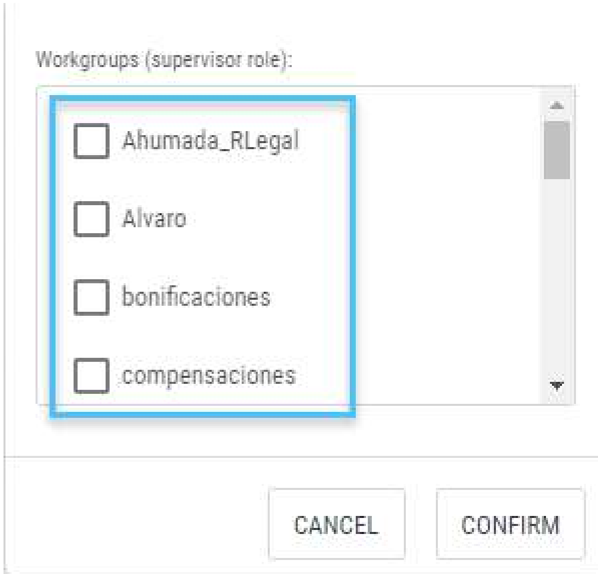
4. Press the "Groups" button of the user you want to associate the group(s) to:



In this section you can assign groups to all the users with Supervisor permissions.

To learn how to assign Agents to groups read: **[INSERT THE LINK HERE]**

5. Check the box that applies to the group that you wish to associate the user to:



You can associate as many groups as needed.

When selecting at least one group, the user with supervision permissions will only be able to monitor the users that belong to such group; in case no group is selected, it will be able to monitor all the campaign's agents.

6. After assigning the group(s) press the "Update" button to continue.
7. To cancel the process without saving the changes press the "Cancel" button.

Related Articles

- User search
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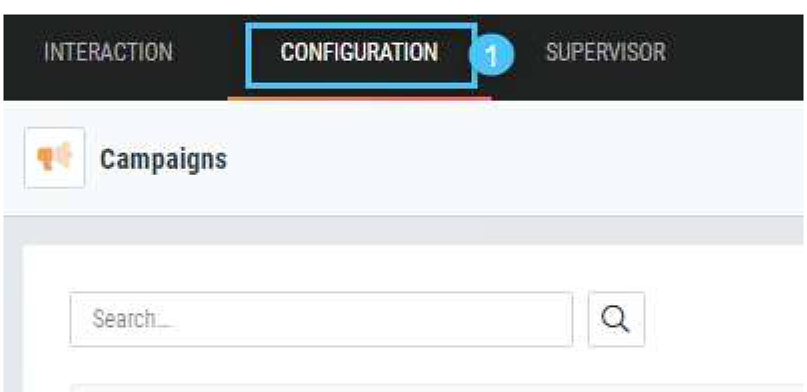
How to assign users to a campaign

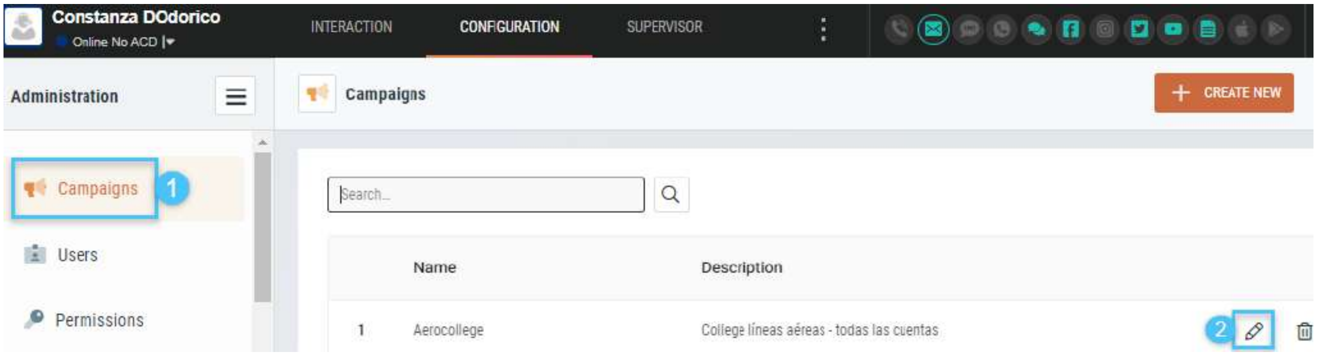
After creating the campaign you must assign the users that will operate in it. Such users will have specific tasks and permissions depending on their role. It is important to point out that a user can be assigned to more than one campaign simultaneously.

To assign users to a campaign you have to:

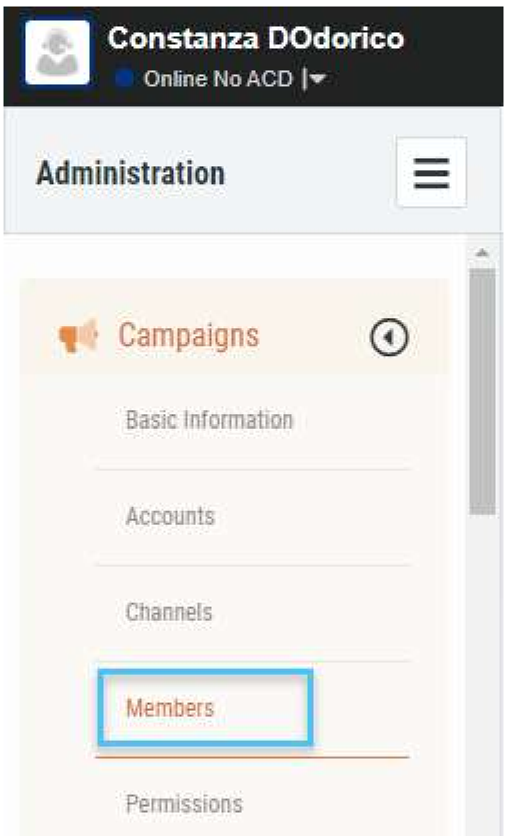
1. Go to the “Configuration” tab1:



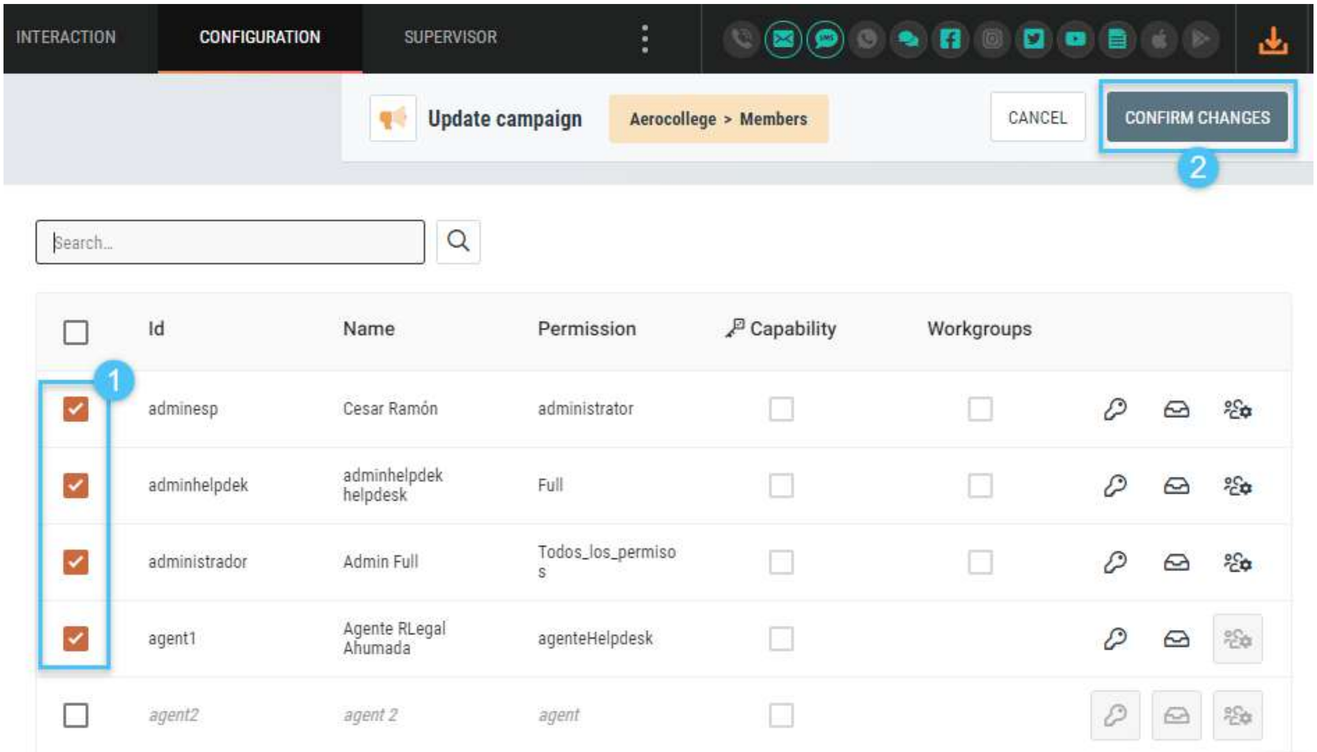
2. Click on the "Campaigns" section and then press the "Edit" button of the campaign to which you will assign the users :



3. Click on the campaign's “Users” section:



4. Check the user(s) box(es) which you want to assign to the campaign and press the "Update" button :



To cancel the operation without saving the changes press the "CANCEL" button.

Related Articles

- User search
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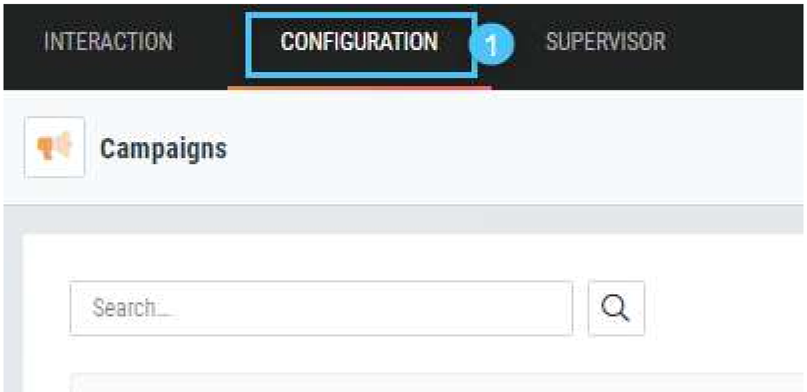
- How to associate an application from the App Store

How to overwrite a user's attention capacity for a specific campaign

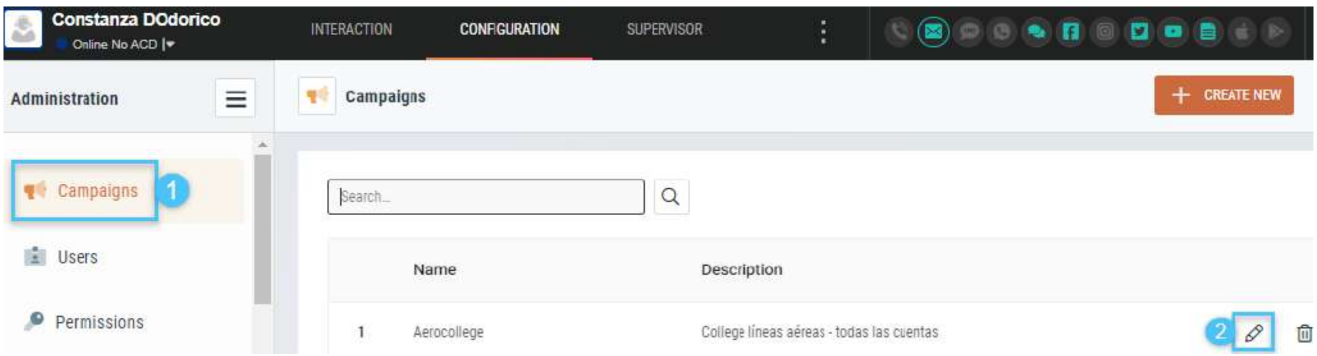
The campaign's attention capacity allows to limit the amount of simultaneous interactions a user can keep active for each one of the channels; yet, it is possible to set a specific value for a specific campaign, without affecting the others which handle the same communication channels.

To overwrite a user's attention capacity for a specific campaign you have to:

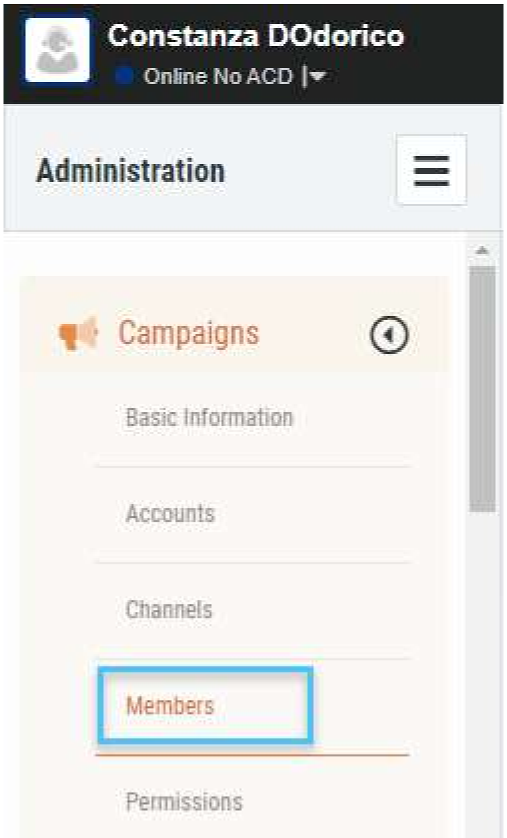
1. Go to the "Configuration" tab 1 :



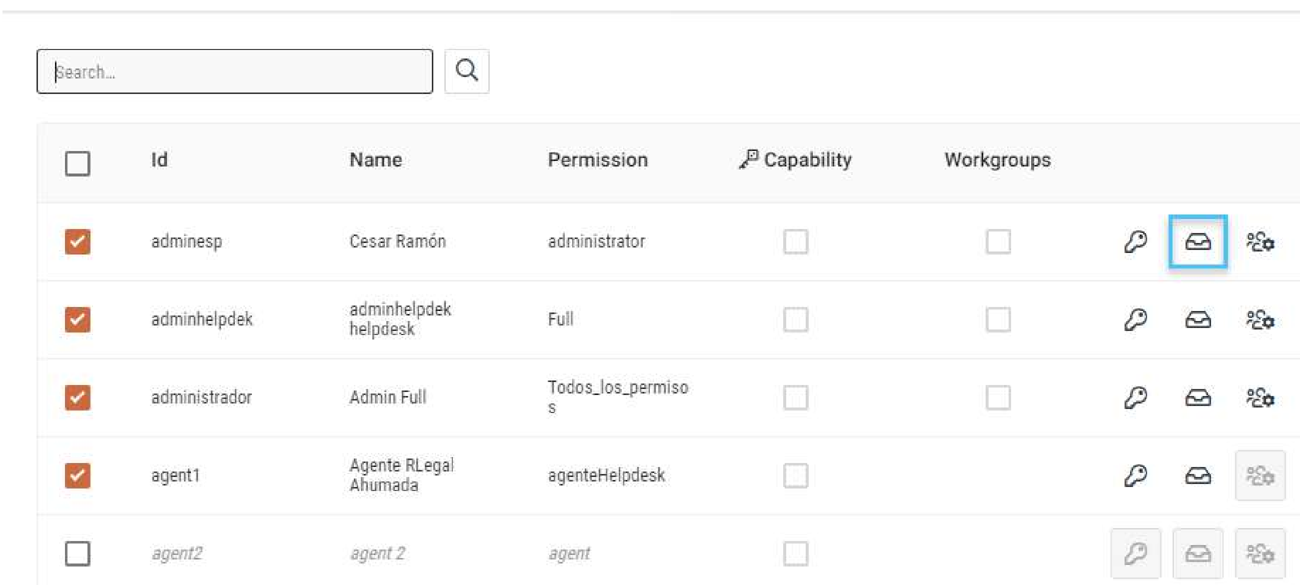
2. Click on the "Campaigns" section 1 and press the "Edit" button of the campaign to which the user belongs to 2 :



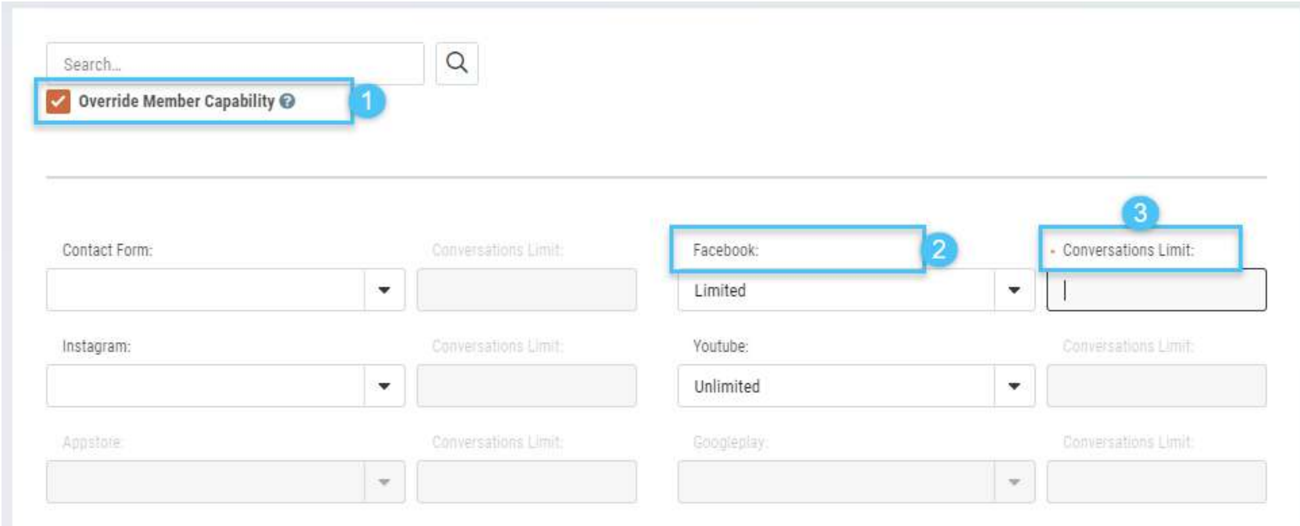
3. Click on the campaign's "Users" section:



4. Press the user's "Capacity" button, to overwrite the attention capacities:



5. Check the "Activate overwrite" checkbox 1 and the accounts associated to that user will be activated, after which, select if you will limit or not the simultaneous interactions the user will handle for the communication channel 2 . In case you limit the channel's interaction limit, enter it 3 :



6. After completing all the required fields, press the "SAVE" button to continue.
7. To cancel the operation without saving the entered data, press the "CANCEL" button.

Related Articles

- User search
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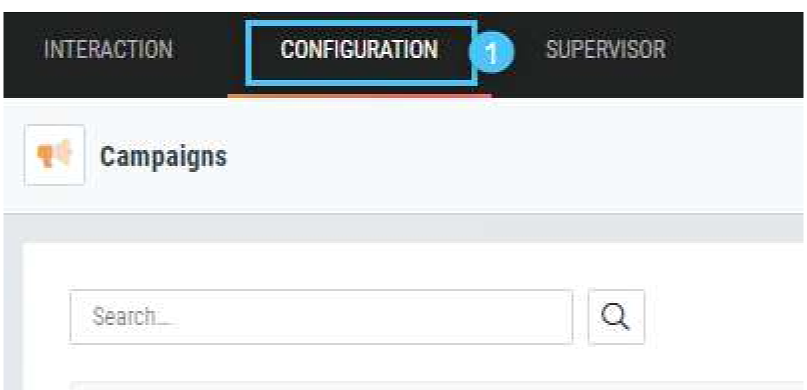
How to overwrite permission groups for a user on a specific campaign

It is possible to overwrite the permission groups for a user on a specific campaign, only if the user has not been assigned to one of the system default roles, that is: *Administrator, Agent or Supervisor*.

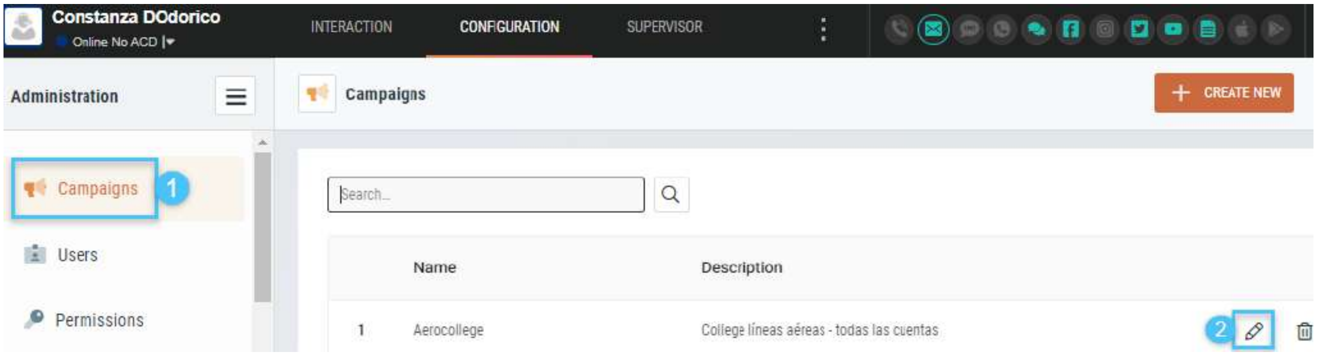
Therefore, you will be able to overwrite the group permissions only if the user has a role that has been defined by the system Administrator.

To overwrite permission groups for a user on a specific campaign you have to:

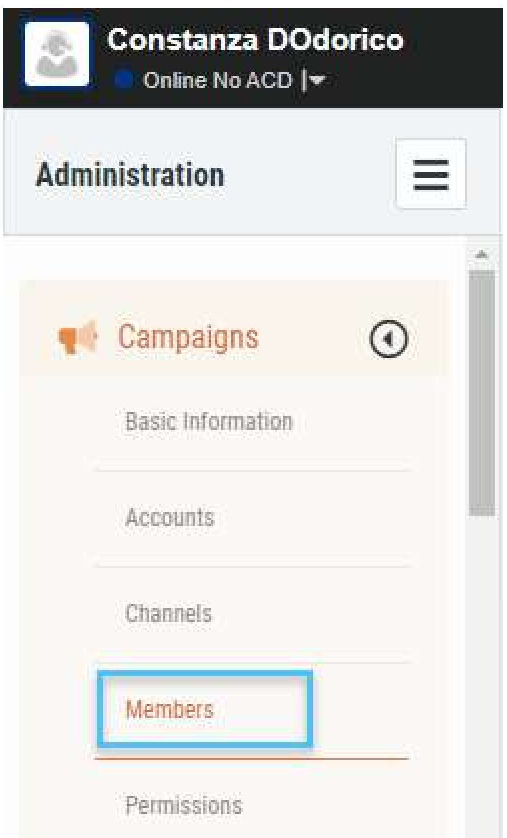
1. Go to the "Configuration" tab 1 :



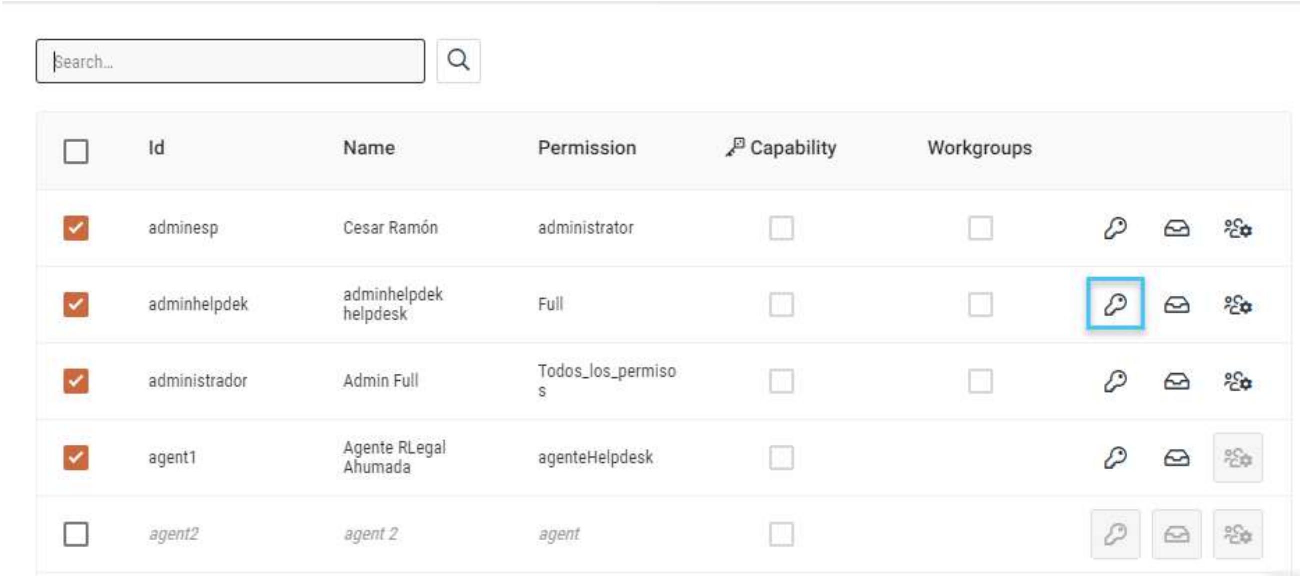
2. Click on the "Campaign" section 1 and then press the "Edit" button of the campaign to which the user belongs to 2 :

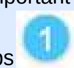


3. Click the campaign's "Users" section:

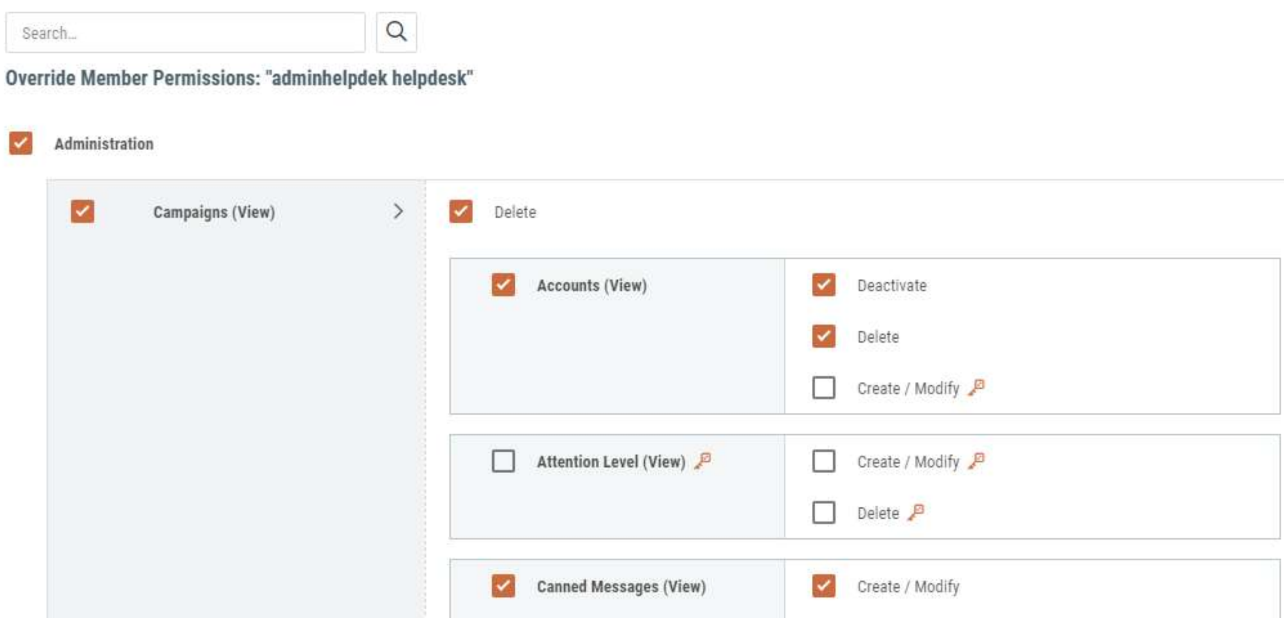


4. Press the "Permissions" button of the user of which you want to overwrite the permission groups 1 :



It's important to point out that the users that have been assigned default system roles, will only be able to see the permission groups  . If you wish to modify a user's permission with a default system role, read: "How to overwrite the permissions of a particular user".

5. Overwrite the permission group(s), checking/unchecking the boxes as it applies:



When checking a permission's or a group of permissions checkbox, you are enabling the corresponding permissions. On the contrary, if the checkbox is unchecked you will be disabling the corresponding permissions.

By doing so, you will only be overwriting the user permissions for that specific campaign. If you want to modify the user's permissions for all the campaigns to which it is assigned, read: "How to overwrite permissions for a particular user.

6. After overwriting the permissions, press the "SAVE" button to save the changes.

7. To cancel the operation without saving the changes, press the "CANCEL" button.
8. To reestablish the overwritten options, press the "REMOVE OVERWRITES" button.

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Schedules

- How to define a campaign's activity and inactivity schedule
- What are Campaign time schedules?

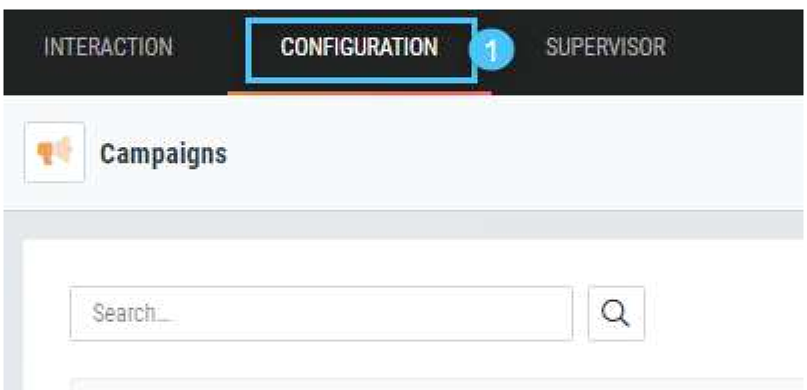
How to define a campaign's activity and inactivity schedule

When setting up the campaign schedule, you will be setting up the beggining and end of the workday for the operators. You can define the schedule according to the time intervals that the operation requires, as well as defining a whole operation day for the campaign if necessary.

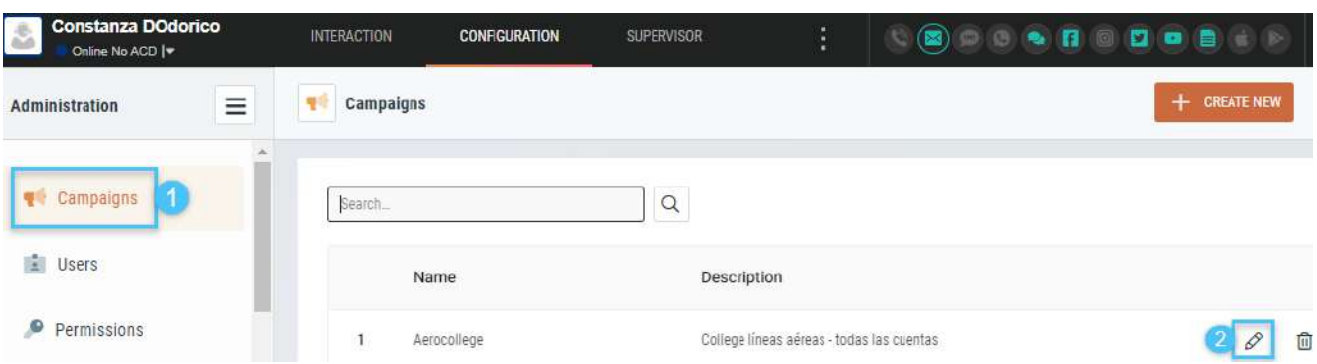
When creating the campaign, the defined schedule for it will be 24/7 by default.

To define the activity and inactivity schedule of a campaign you have to:

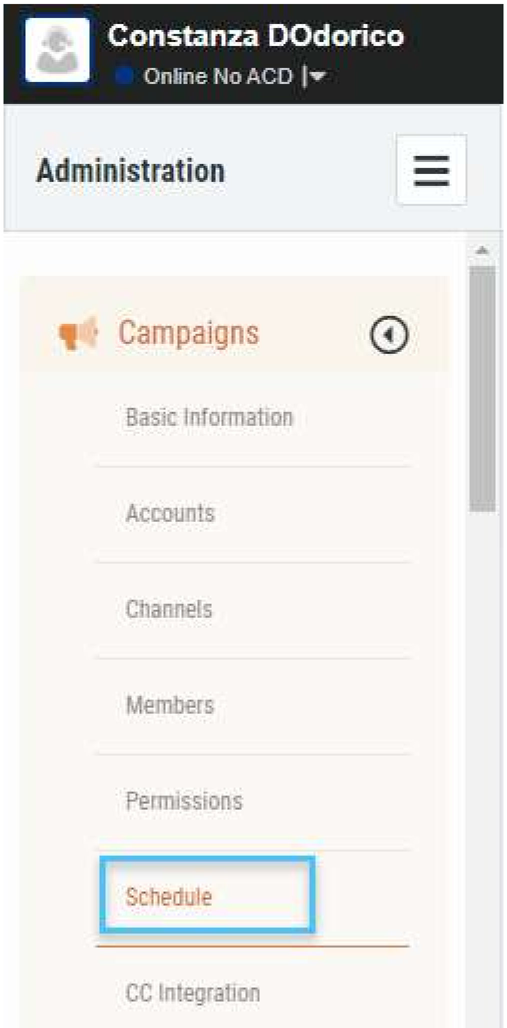
1. Go to the "Configuration" tab:



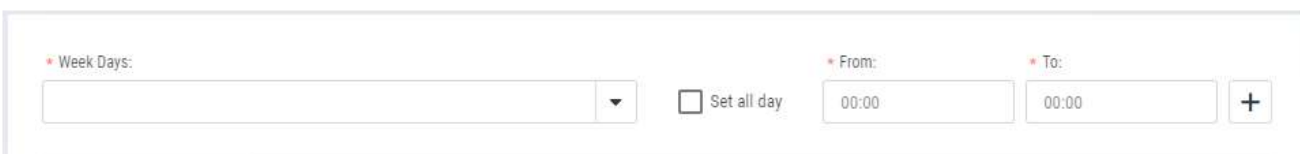
2. Click on the "Campaigns" section 1 and press the "Edit" button of the campaign to which you will define the schedule 2 :



3. Click on the campaign's "Schedule" section:



4. Enter the required information:



Days of the week: select the days of the week when your campaign will be active.

All day: if checked, the campaign will be active during throughout the whole selected day.

From: campaign start time.

To: campaign end time.

Once the day(s) of the week with their time intervals are defined, press the "ADD INTERVAL" button.

The **"From"** and **"To"** have to be entered in 24 hour *HH:MM* format.

5. The added intervals will be seen as follows:

To remove a day from the campaign's schedule, press the "Delete intervals" button of the day that applies.

6. After completing all the required fields, press the "SAVE" button to save the changes.
7. To cancel the operation without saving the changes, press the "CANCEL" button.

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What are Campaign time schedules?

Campaign time schedules will indicate the days and time intervals in which a campaign will be active or inactive.

To define a campaign's schedule, read: How to define a campaign's activity and inactivity schedule.

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CC integration

- What is CC Integration?
- What are the possible integration types?

What is CC Integration?

From the administration of each campaign, it is possible to specify the data for integration with the business application.

When attending to an interaction through any of the enabled channels, it is possible to show additional contact data or relevant business information, through the on-screen display of the web CRM that your organization already uses, or an application developed with i6 Web Designer especially for the campaign.

To learn about the possible integration types, read: What are the possible integration types?

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What are the possible integration types?

In i6 there are two possible integration types:

1. Integration of the campaign with a Web Designer application. For information on how to do this, see How to integrate the campaign with a Web Designer application.
2. Integration of the campaign with an external web application. For information on how to do this, see How to integrate the campaign with an external web application.

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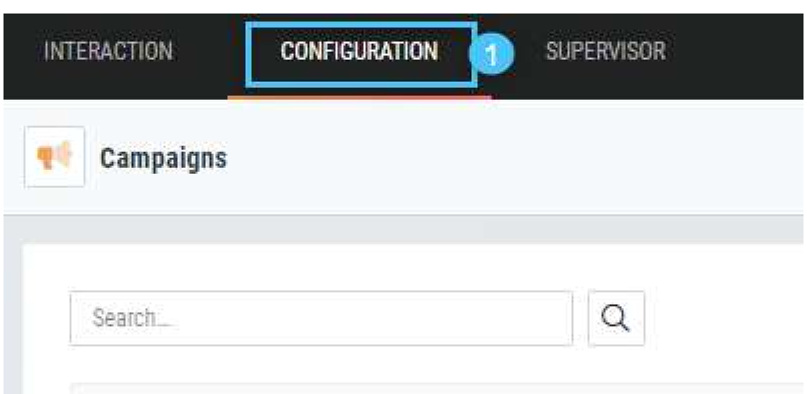
How to integrate the campaign with a Web Designer application

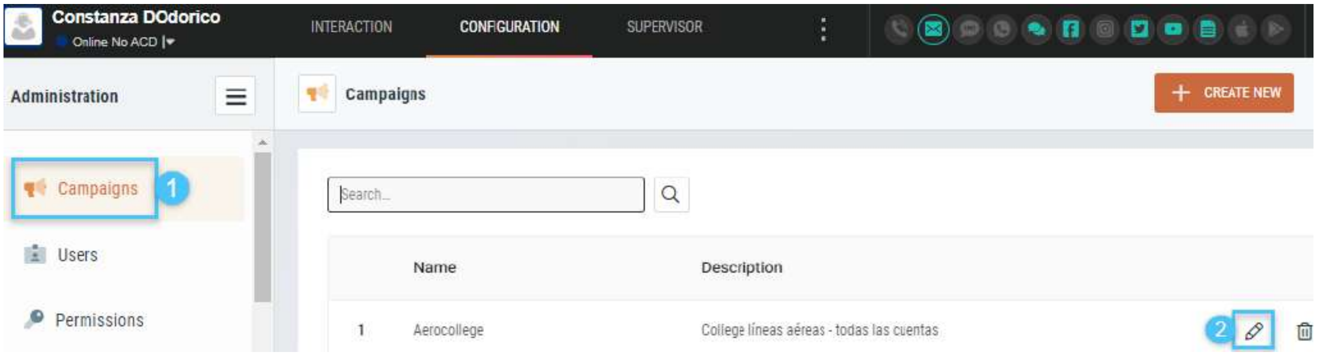
Integration with a management application can be performed to attend to Campaign interactions.

To integrate the campaign with a Web Designer application:

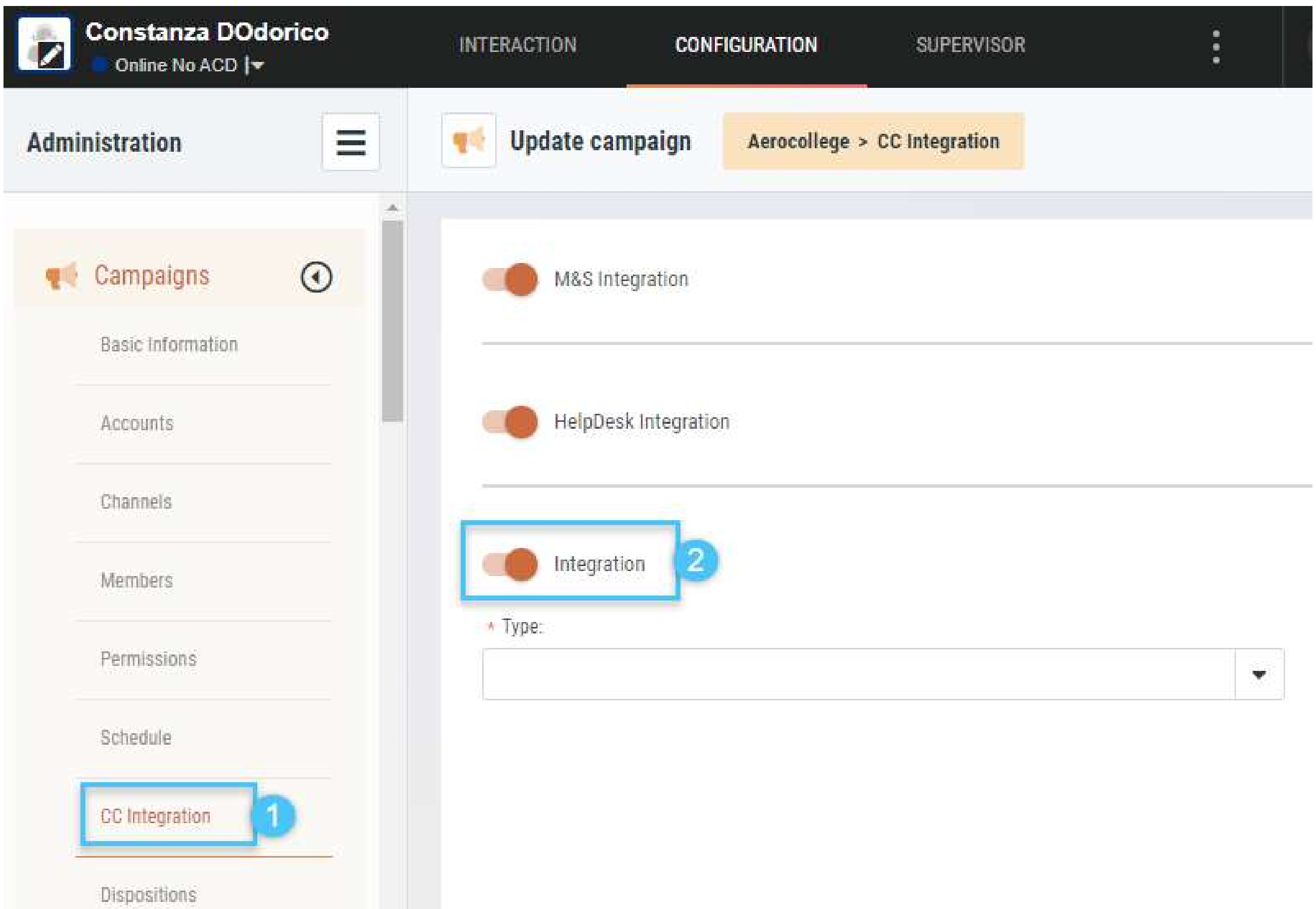
1. Go to the "Configuration" tab:



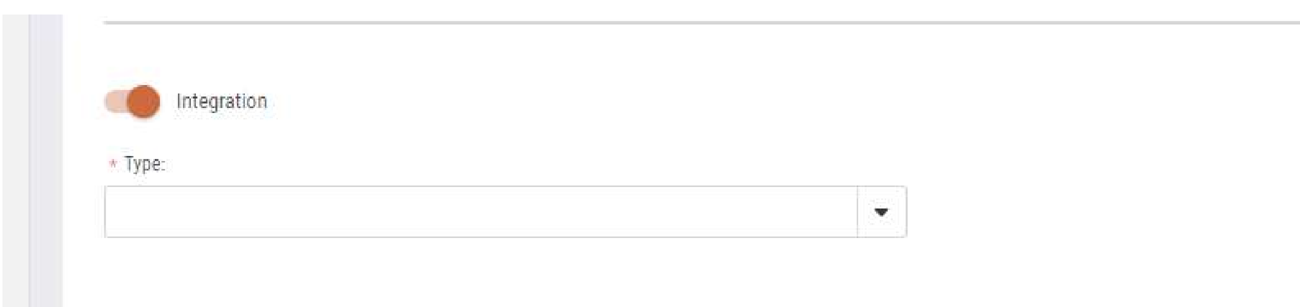
2. Click on the section "Campaigns" and then click the "Edit" button of the campaign where the integration will take place :



3. Click on the "CC Integration" section of the campaign 1 and then check the box "Integration" 2 :



4. Enter the required data:



Type: select the integration type *inConcert Web Application* from the drop-down list.

Window mode: mode of the window. The options are: *Maximized and Normal.*

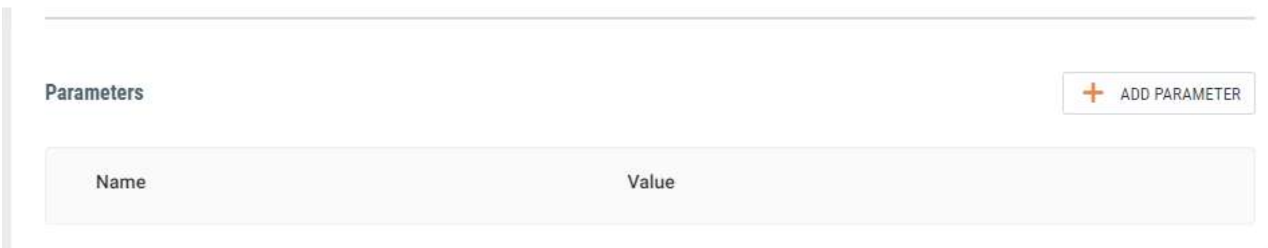
5. After selecting the integration type *inConcert Web Application*, enter the following:

   a. **Application Data:**

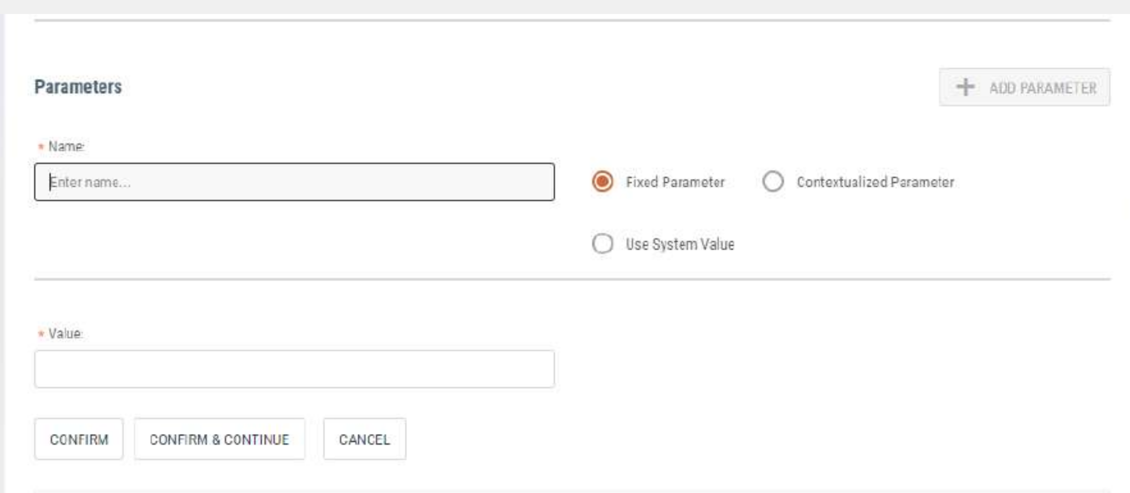
Application name: Web Designer application to use.

Override finish action: Checking this box will override the finalization action.

   b. **Parameters:**



After clicking the "NEW PARAMETER" button, you need to enter the following data.



Name: name of the parameter.

Type: indicate if the parameter is *Custom* or *System*.

Value: value of the parameter.

If the **Parameter Type** selected is *Custom*, the value of the parameter must be entered manually.

If the **Parameter Type** selected is *System*, a drop-down list will be enabled with the available system parameter values.

After completing all the required fields, click the "CREATE" button to create the new parameter, "CREATE & CONTINUE" to save the parameter and continue creating another, or "CANCEL" to cancel the operation without saving the entered data.

6. After completing all the required fields, click the "SAVE" button to continue.
7. To cancel the operation without saving the entered data, click the "CANCEL" button.

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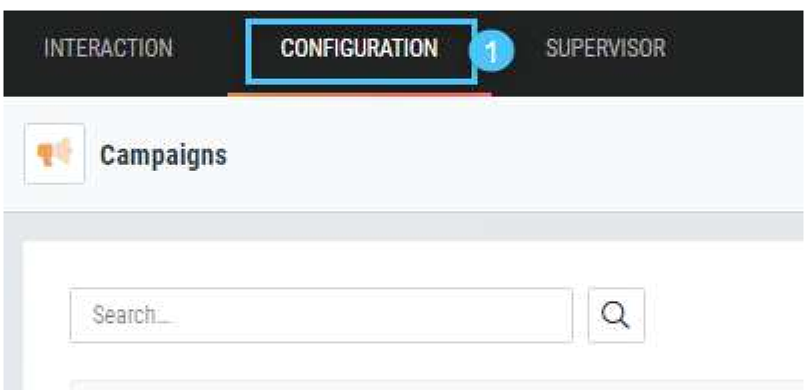
How to integrate the campaign with an external web application

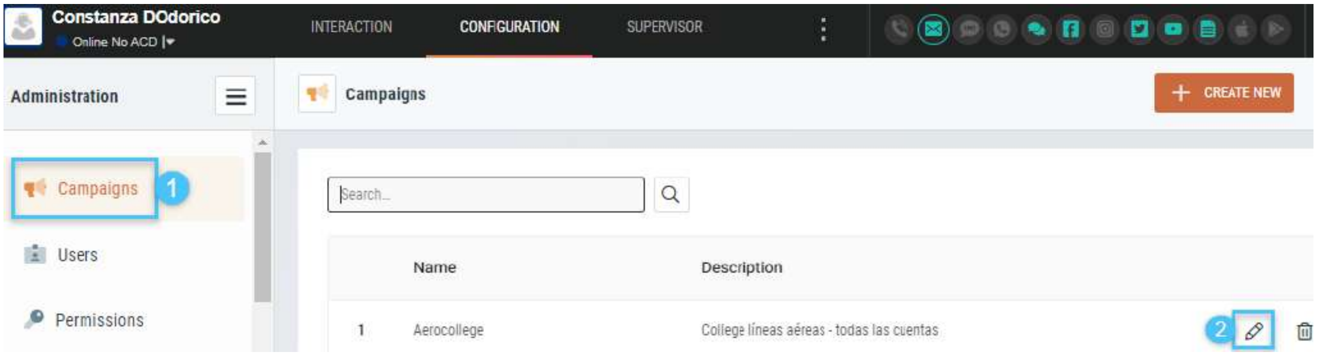
Integration with a management application can be performed to attend to campaign interactions.

To integrate the campaign with an external web application:

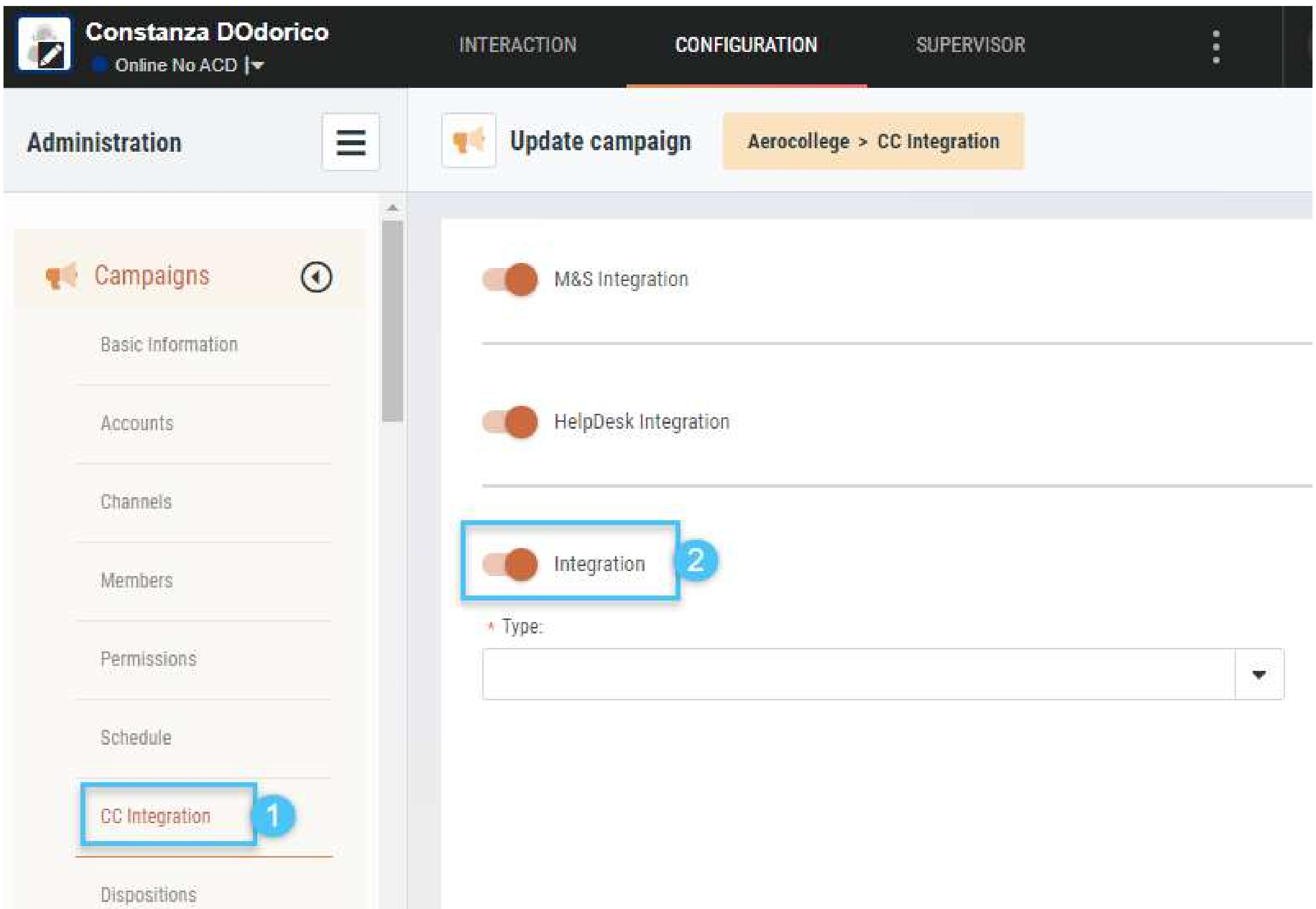
1. Go to the "Configuration" tab:



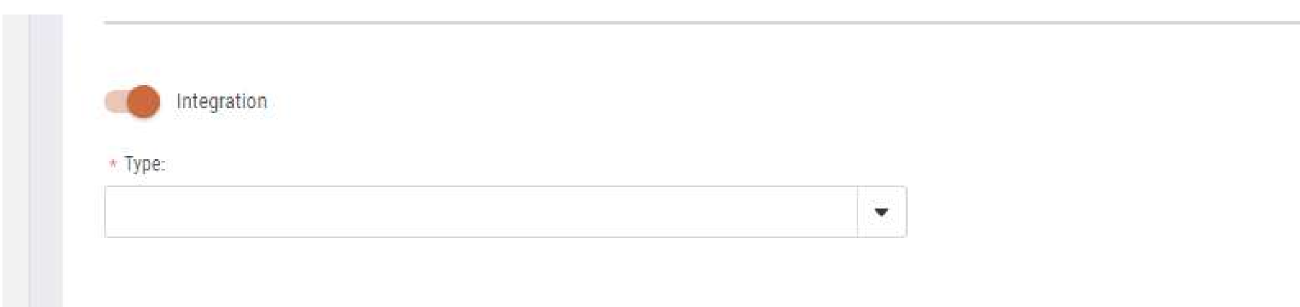
2. Click on the section "Campaigns" 1 and then click the "Edit" button of the campaign where the integration will take place 2 :



3. Click on the "CC Integration" section of the campaign 1 and then check the box "Integration" 2 :



4. Enter the required data:

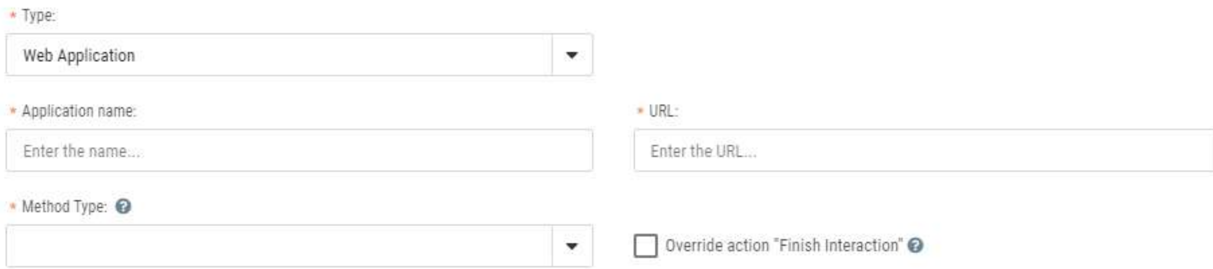


Type: select the integration type *Web Application* from the drop-down list.

Window mode: mode of the window. The options are: *Maximized and Normal.*

5. After selecting the integration type *inConcert Web Application*, enter the following:

   a. **Application Data:**



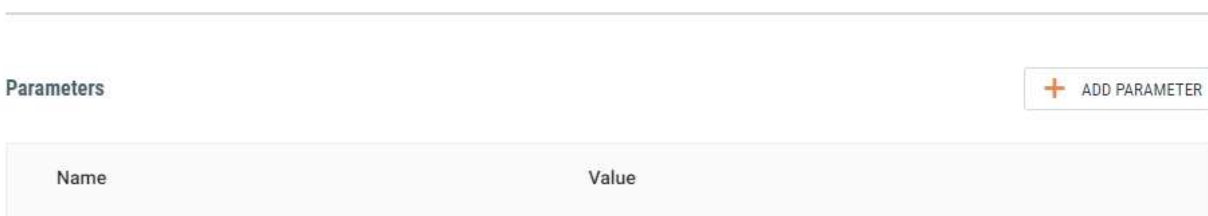
Application name: application name.

URI: URL to access the application.

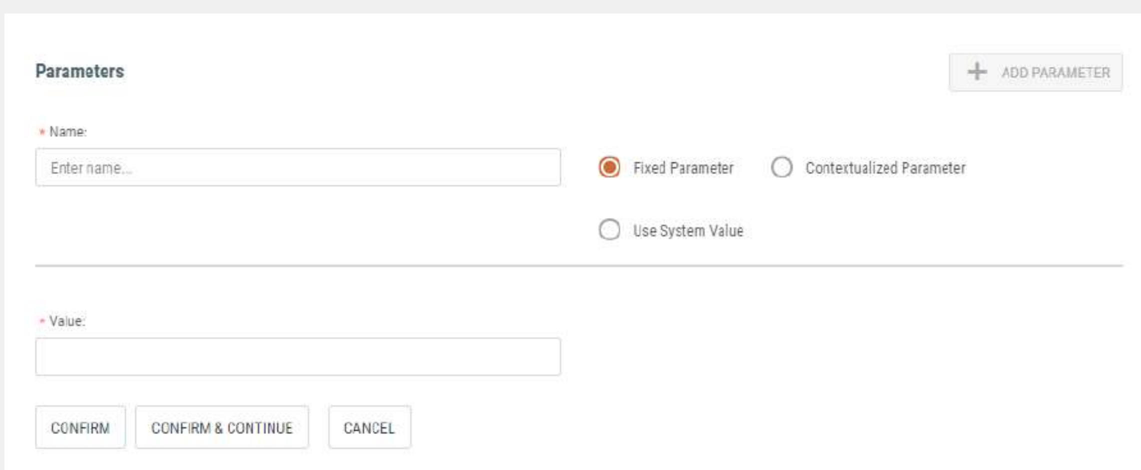
Method type: method by which the parameters will be sent. The options are: *Get and Post.*

Override finish action: Checking this box will override the finalization action.

   b. **Parameters:**



After clicking the "NEW PARAMETER" button, you need to enter the following data:



Name: name of the parameter.

Value: value of the parameter.

After completing all the required fields, click the "CREATE" button to create the new parameter, "CREATE & CONTINUE" to save the parameter and continue creating another, or "CANCEL" to cancel the operation without saving the entered data.

6. After completing all the required fields, click the "SAVE" button to continue
7. To cancel the operation without saving the entered data, click the "CANCEL" button.

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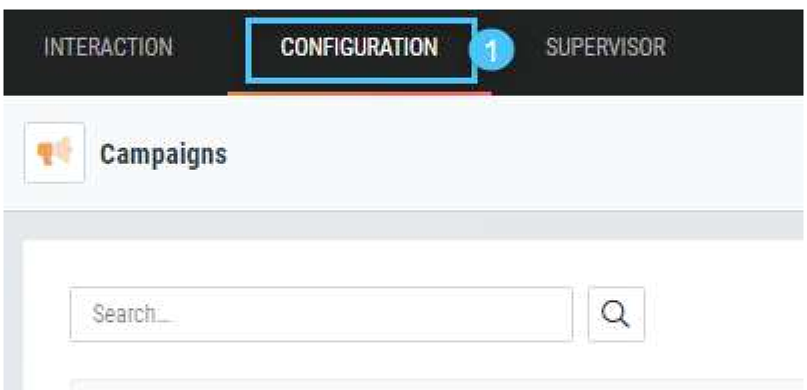
How to integrate the campaign with HelpDesk

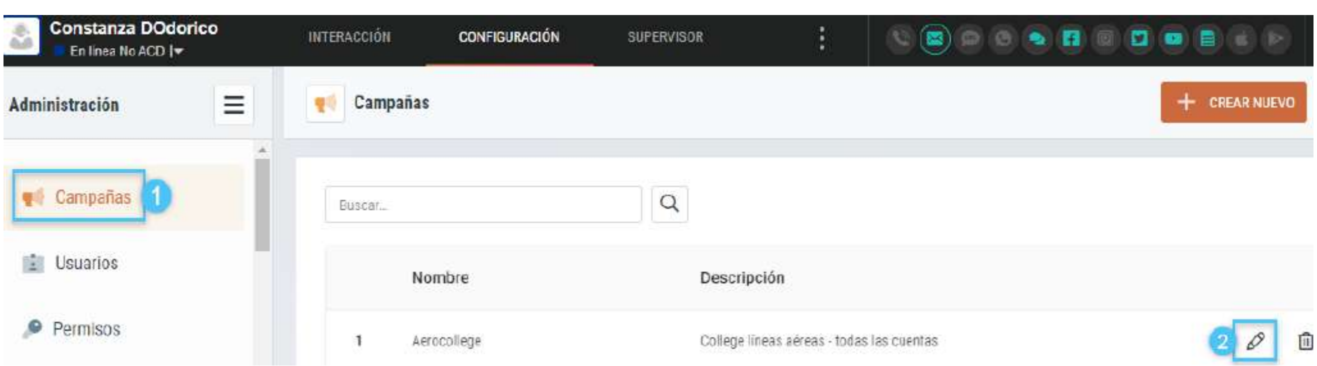
It is possible to carry out integration with the HelpDesk application

To integrate the campaign with a HelpDesk application:

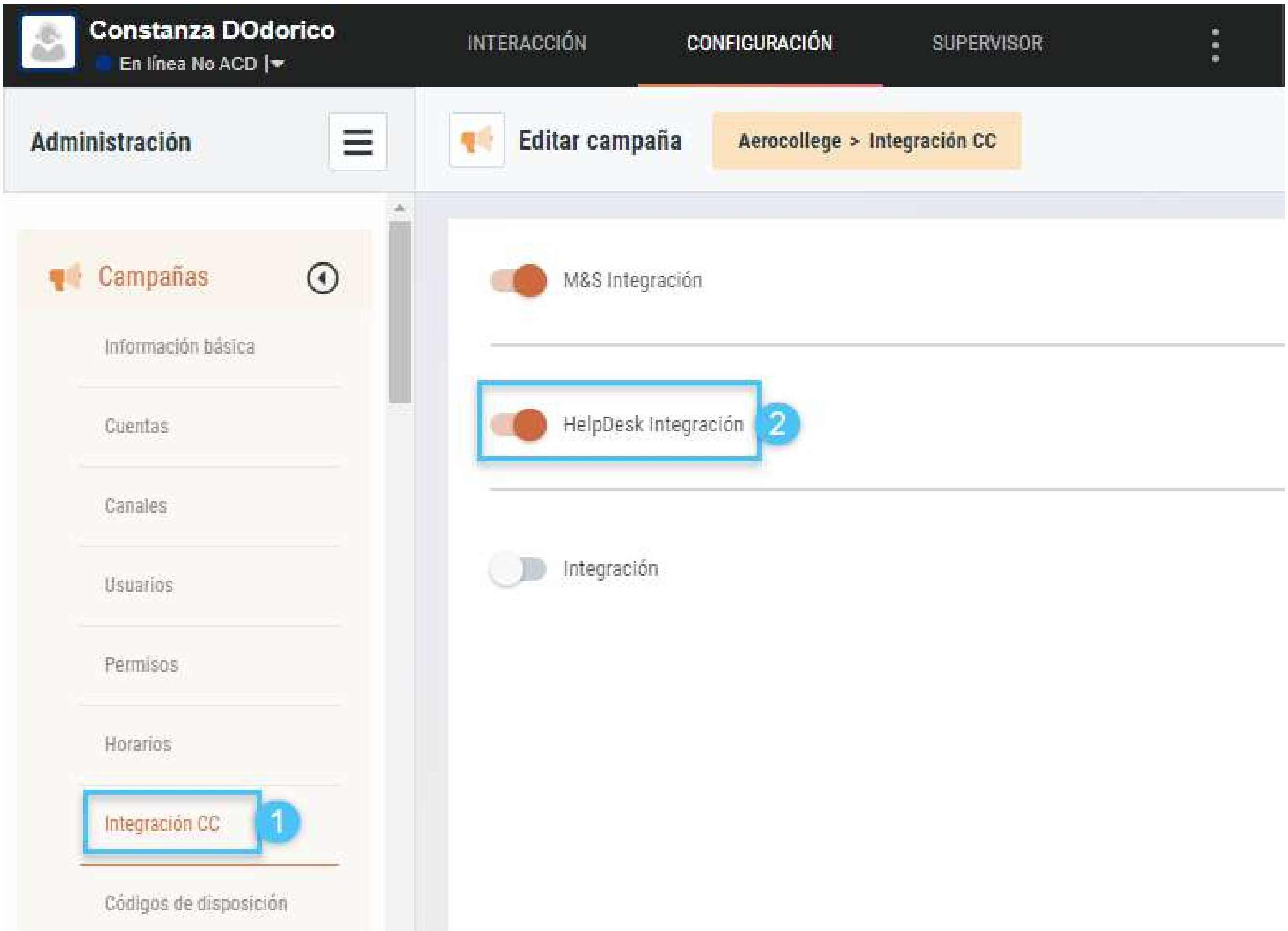
1. Go to the ***"Configuration"*** tab:



2. ***Click on the "Campaigns" section*** and then ***click the "Edit" button*** of the campaign where the integration will take place :



3. Click on the ***"CC Integration"*** section of the campaign  and then check the box ***"HelpDesk Integration"***  :



4. ***Click save*** to finish.

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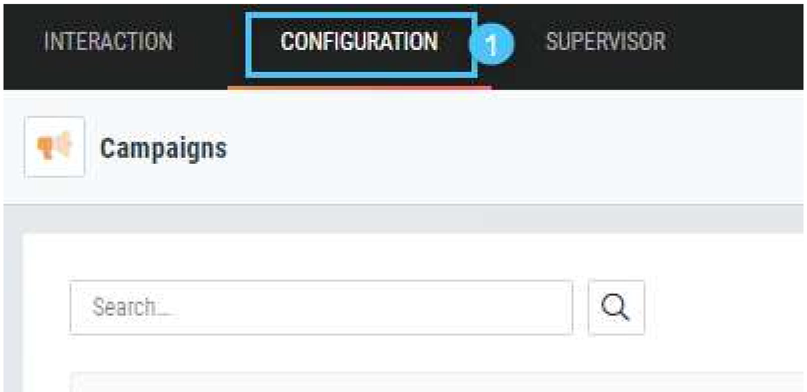
How to integrate the campaign with Marketing & Sales

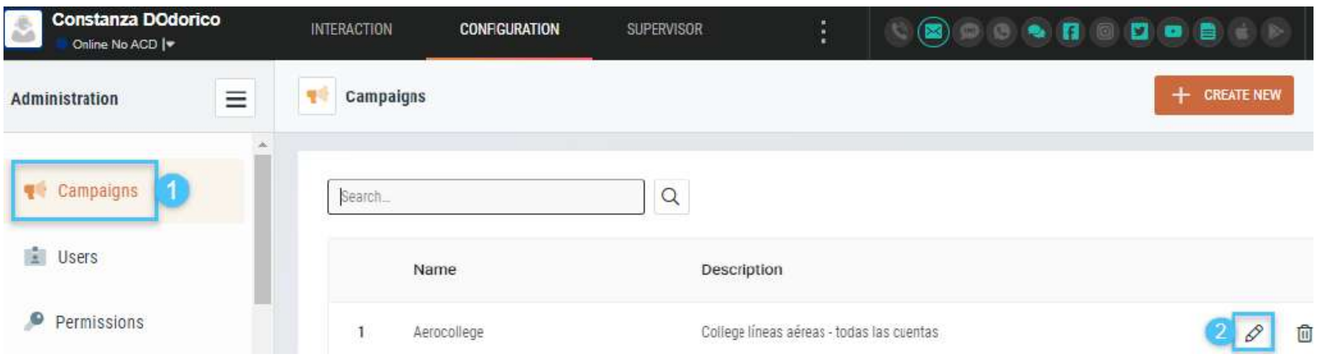
It is possible to carry out integration with the Marketing & Sales application.

To integrate the campaign with an external web application:

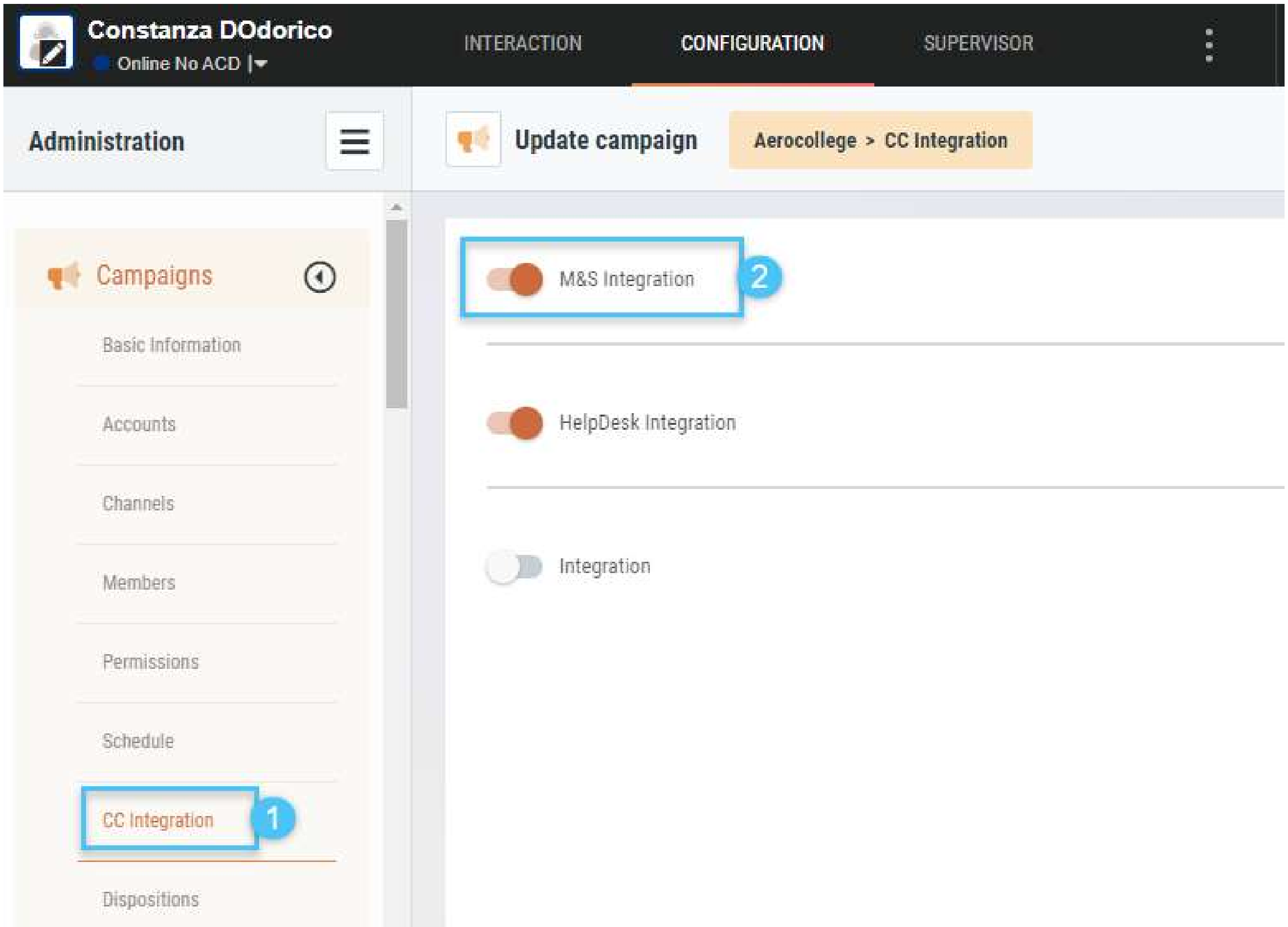
1. Go to the ***"Configuration"*** tab:



2. Click on the ***"Campaigns"*** section and then click the ***"Edit"*** button of the campaign where the integration will take place :



3. Click on the ***"CC Integration"*** section of the campaign and then check the box ***"M&S Integration"*** :



4. Click save to finish.

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Disposition Codes

- What are the Disposition Codes?
- How to define Categories and Disposition Codes

What are the Disposition Codes?

The Disposition Codes are the possible management results of the campaign's interactions, being able, through a CRM, to associate interactions with business results. The disposition codes enable you to classify the interactions management.

Through CRM integration, the disposition codes ease interactions management and follow up, being able to make decisions automatically according to the results.A través de una integración CRM, los códigos de disposición facilitan la gestión y seguimiento de las interacciones, pudiéndose tomar acciones de forma automática dependiendo de los resultados.

> The disposition codes are classified in categories.

To define categories and disposition codes, read: "How to define Categories and Disposition Codes".

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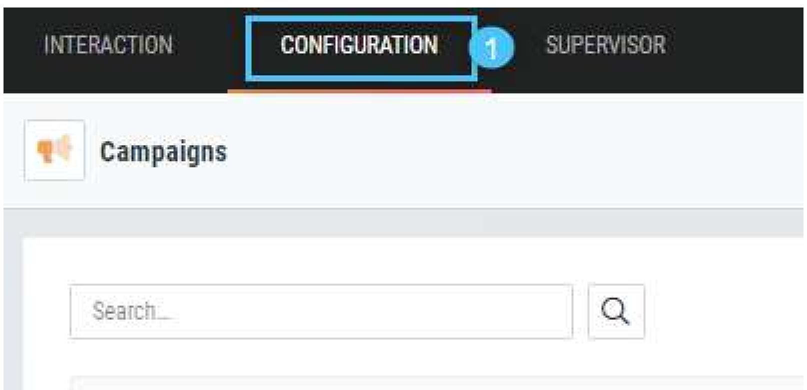
How to define Categories and Disposition Codes

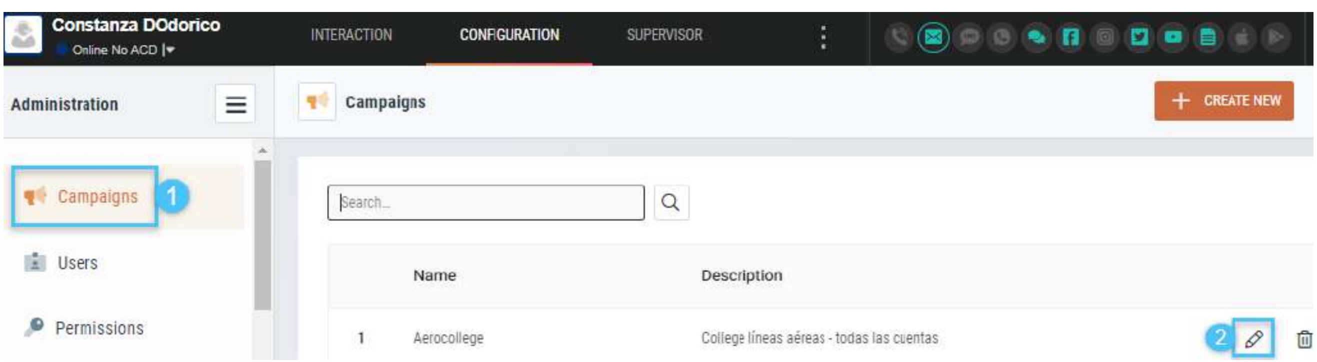
When defining categories and disposition codes you must understand clearly that they will be used by the operators to be assigned to interactions, through the CRM, thus being able to categorize their outcome.

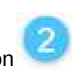
To define categories and disposition codes you have to:

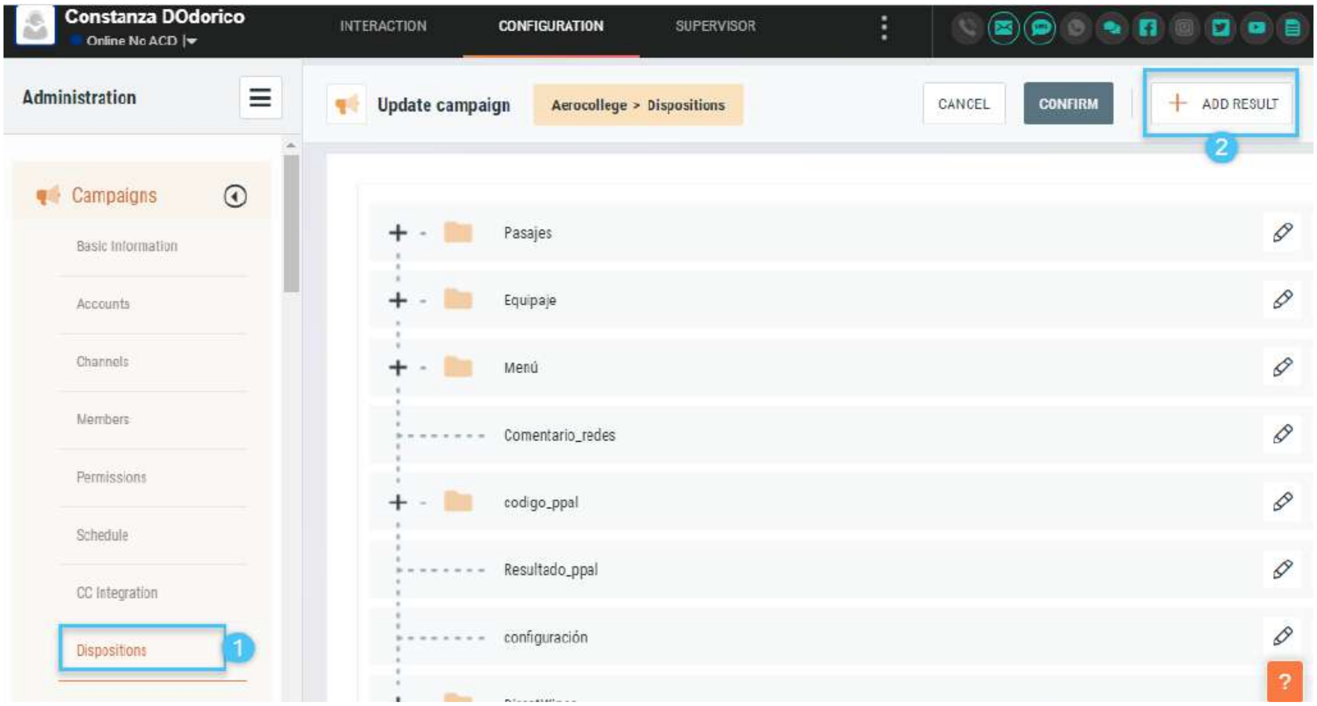
1. Go to the "Configuration" tab:



2. Click on the "Campaigns" section  and press the "Edit" button of the campaign where you will define categories and disposition codes  :

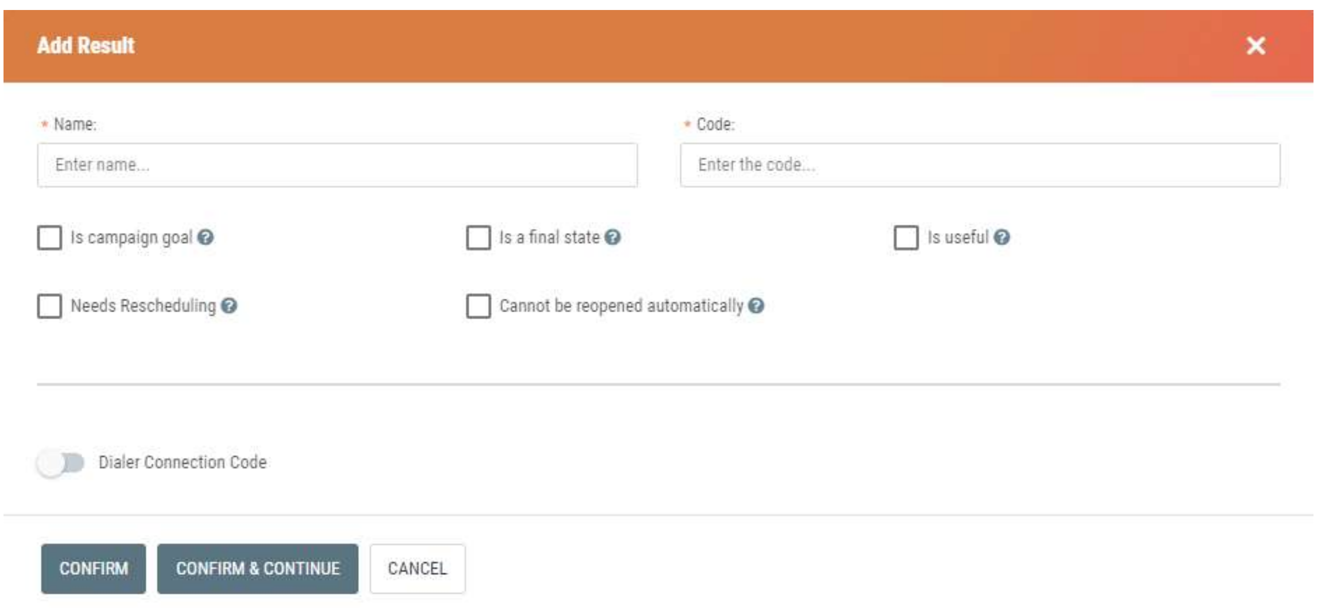


3. Click on the campaign's "Disposition Codes" section  and press the "ADD RESULT" button  to create a main category for disposition codes:



The disposition codes are organized in tree heirarchy.

4. Enter the required data:



Name: unique name which will identify the new result in the system.

Is Goal: if checked, it indicates that this is a campaign objective.

Code: unique code assigned to the result in the system.

Needs Reschedule: if checked, it indicates that the interaction needs to be rescheduled.

Is UseFul: if checked, it indicates that the result is useful.

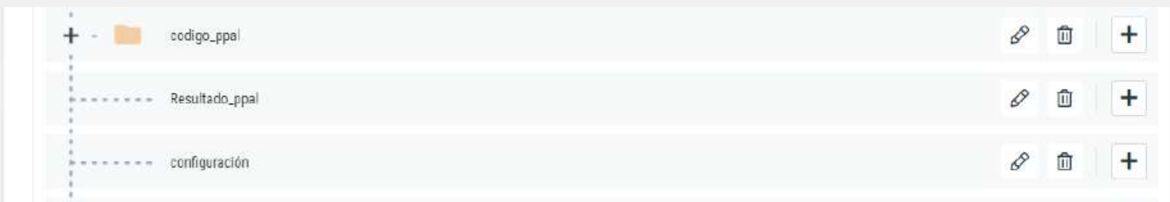
Dialer Connection Code: if checked, you must indicate which contact result should be recorded in an automatic dialed call.

Press "CREATE" to create the result, or "CREATE AND CONTINUE" to add the result and keep adding more in the same level.
To cancel the process without saving changes, press the "CANCEL" button.

5. To create a disposition code in a previously defined category, press the add button **"+"** of the defined category:

6. Set up the new result as indicated in step 3.

The disposition code tree will be show as follows:



7. After completing all the required fields, press the "SAVE" button to continue.
8. To cancel the operation without saving changes, press the "CANCEL" button.

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Labels

- What are the Labels and what are they for?
- How to define a new Label
- How to edit a Label
- How to delete a Label

What are the Labels and what are they for?

Labels are tags that are defined to classify and filter interactions. Once the labels have been defined, they can be assigned to interactions and then used to filter the interactions as required.

To define a Label, read "How to define a new Label".

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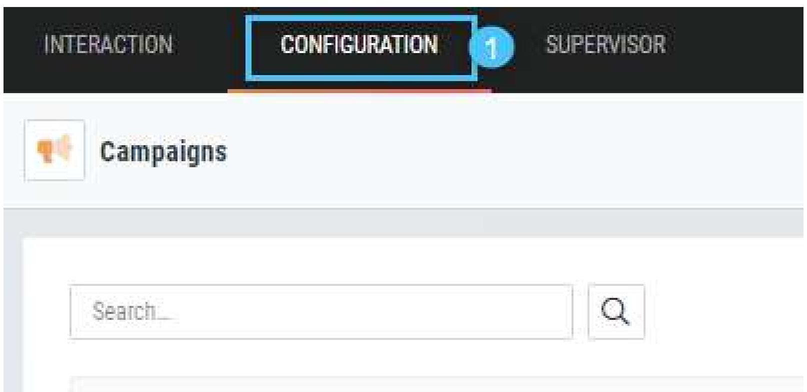
How to define a new Label

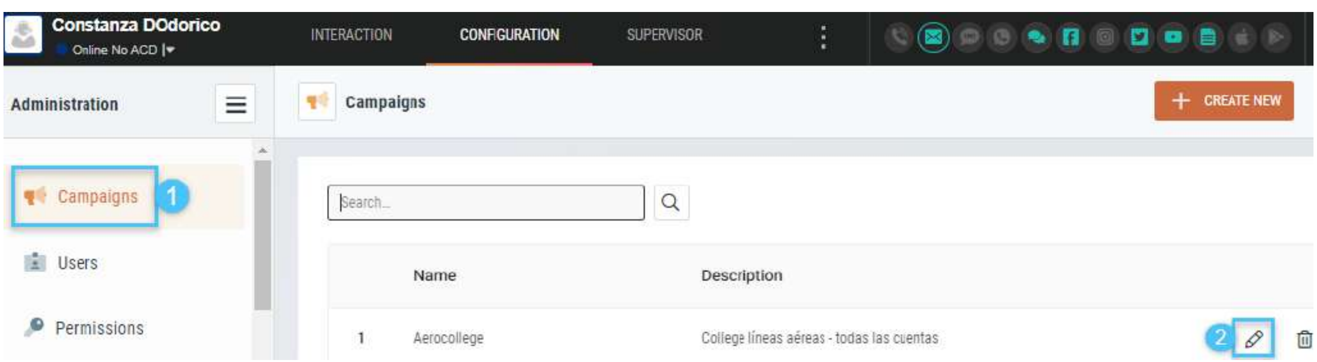
Labels are used to filter interactions, and can be assign y pueden ser asignadas a las interacciones al momento de su atención; deben ser creadas previamente por el Administrador y así estar disponibles para los operadores.

To define a new label:

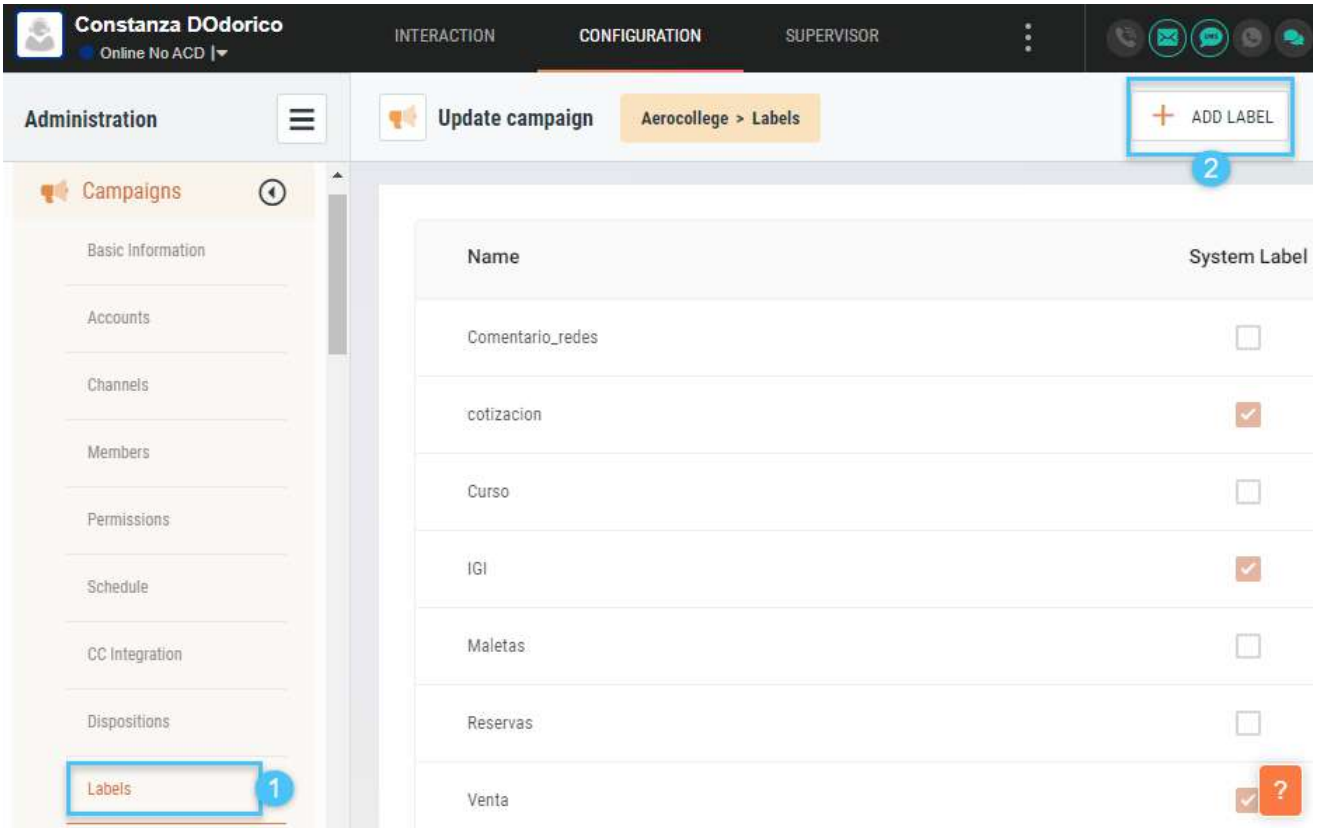
1. Go to the "Configuration" tab:



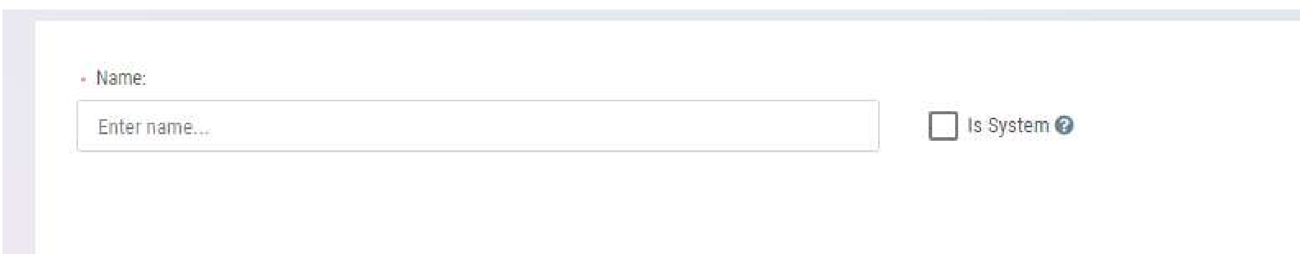
2. Click on the section "Campaigns" 1 and then click the "Edit" button for the campaign for which the label will be defined 2 :



3. Click on the "Labels" section of the campaign 1 and then click the button "NEW LABEL" 2 :



4. Enter the required data:



Name: name that will identify the label in the system.

Is System: if you check this box, the label will be considered to be from the system, and cannot be assigned by the agents to the interactions.

5. After completing all the required fields, click the "CREATE" button to define the new label.
6. To cancel the operation without saving the entered data, click the “CLOSE” button.

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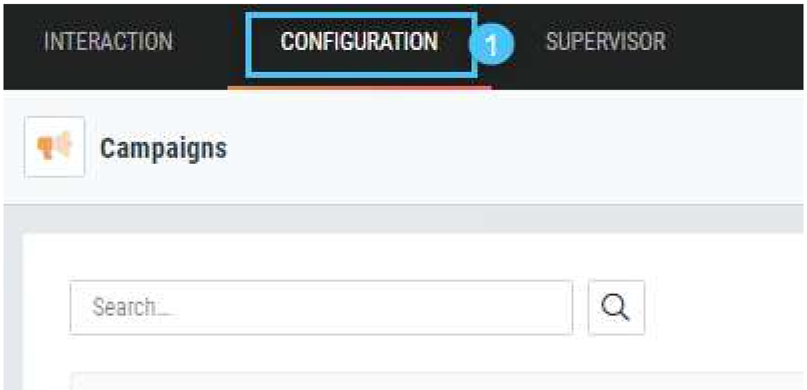
How to edit a Label

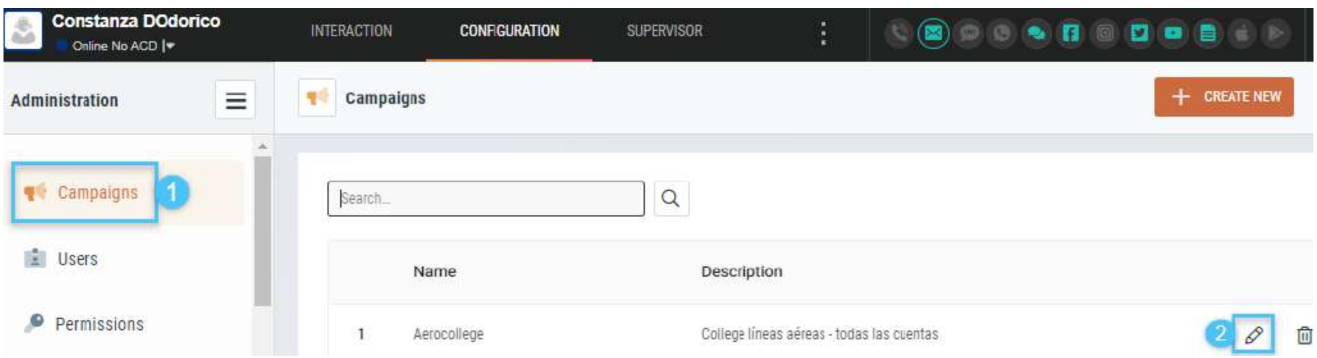
You can edit a label after creating it, and check/uncheck the box that indicates that it is a system label. If you want to know how to define a label, keep reading: "How to define a new Label".

To edit a label:

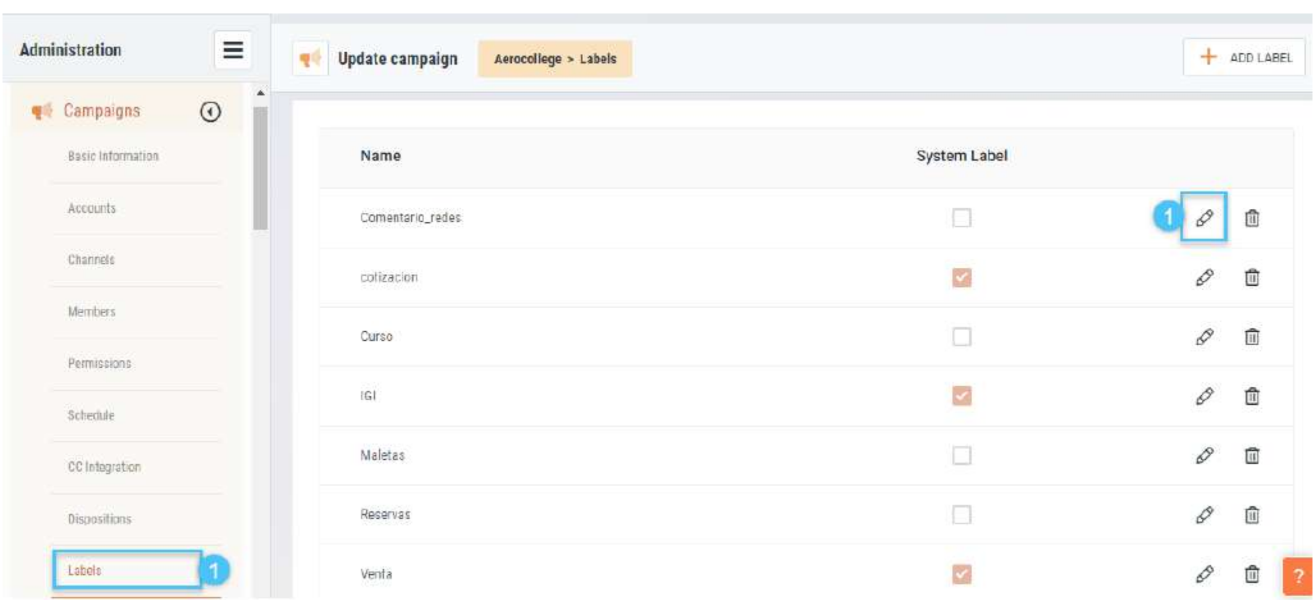
1. Go to the "Configuration" tab:



2. Click on the section "Campaigns" 1 and then click the "Edit" button for the campaign for which the label will be defined 2 :



3. Click on the "Labels" section of the campaign 1 and then click the "Edit" button of the label 2 :



The identifying name of the label cannot be edited.

4. After making the modifications, click the "UPDATE" button to save the changes made to the label.
5. To cancel the operation without saving the modifications, click the "CLOSE" button.

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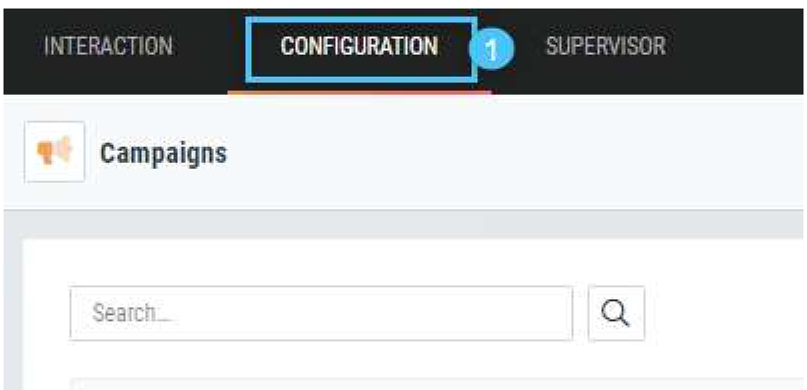
- How to associate an application from the App Store

How to delete a Label

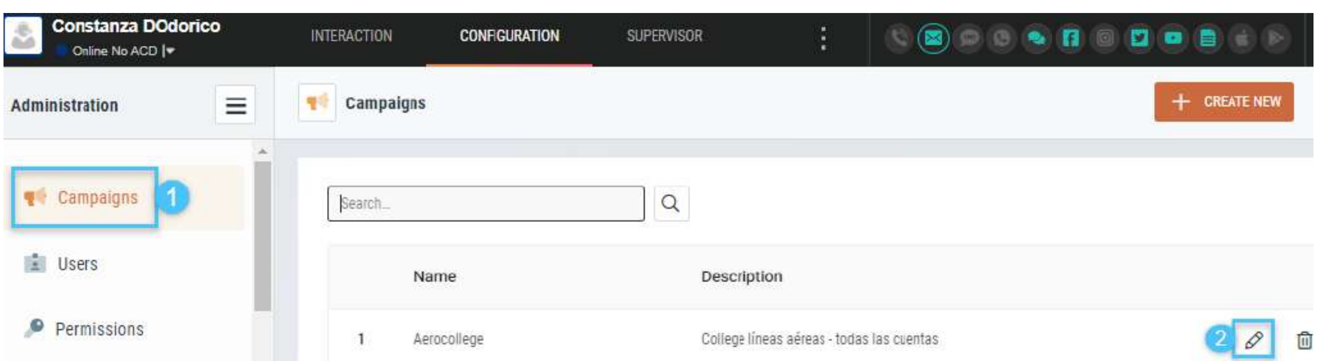
You can delete a label anytime you want but you must bear in mind that when you delete it, it can no longer be assigned by the operators to any interaction; however, the interactions that already had this label assigned before it was eliminated will not lose it.

To delete a label:

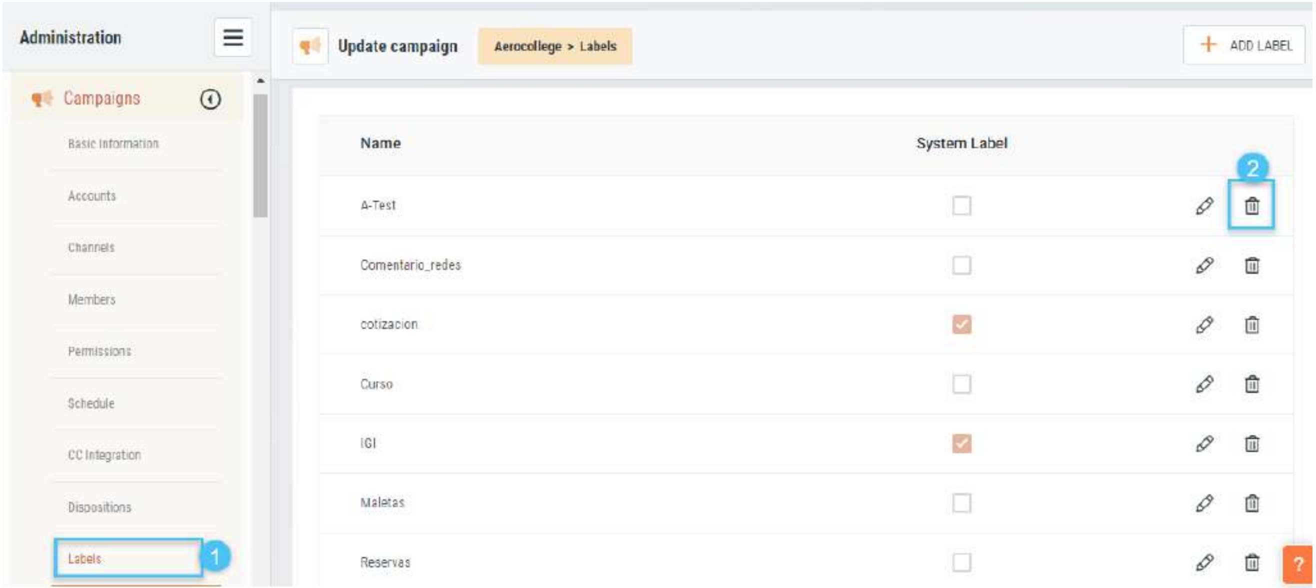
1. Go to the "Configuration" tab:



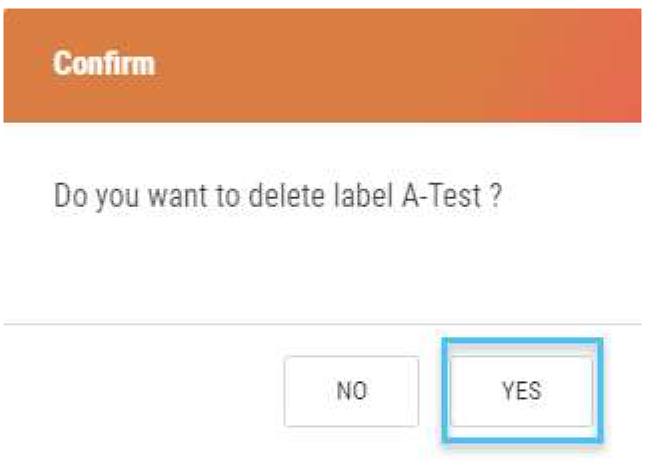
2. Click on the section "Campaigns" 1 and then click the "Edit" button for the campaign for which the label will be defined 2 :



3. Click on the "Labels" section of the campaign 1 and then click the "Delete" button of the label 2 :



4. Click the "Yes" button to confirm deletion of the label:



5. A message confirming successful deletion from the campaign is displayed:

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Notifications

- What are notifications and what are they for?
- How to configure interaction notifications
- Structure of Notification Messages

What are notifications and what are they for?

Interaction notifications are used to configure the sending of notifications to third-party applications through an http request, that is, a URL.

Read the following article to learn more about interaction notifications: How to configure interaction notifications.

Related Articles

- User search
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- How to associate an application from the App Store

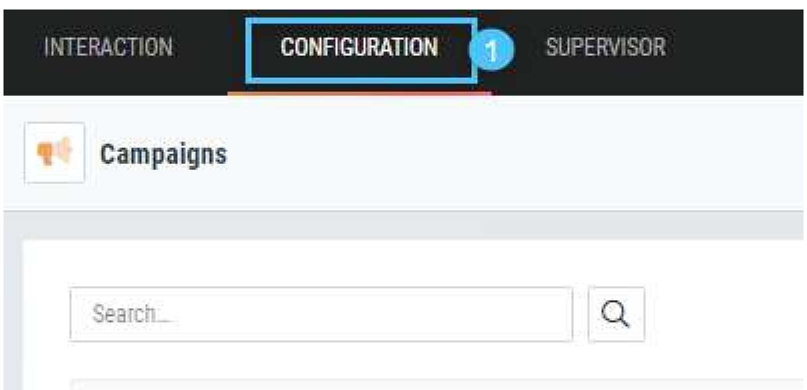
How to configure interaction notifications

Notifications are used to send notifications to third-party applications when certain interaction events occur.

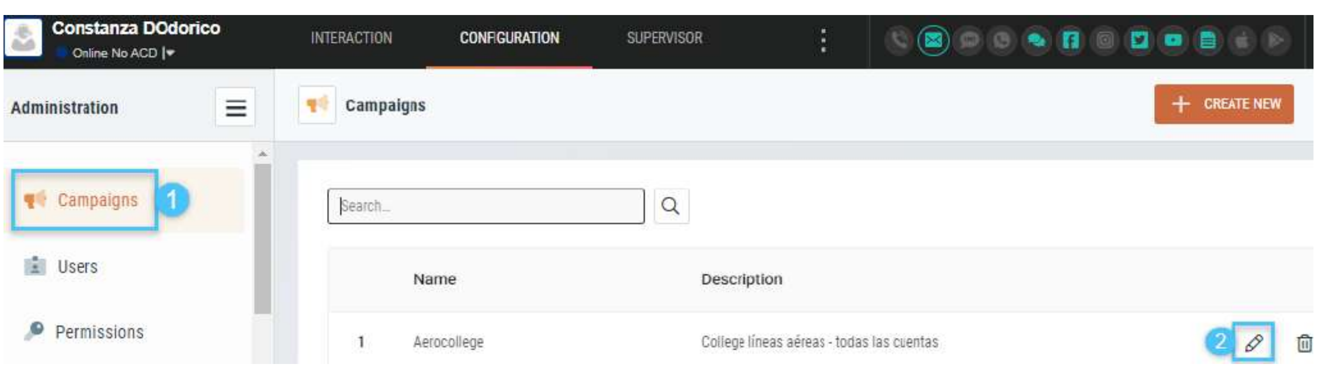
- Notifications must be activated at the *VCC* configuration level in provisioning.
- They require permissions at the user level.

Follow these steps to configure Notifications:

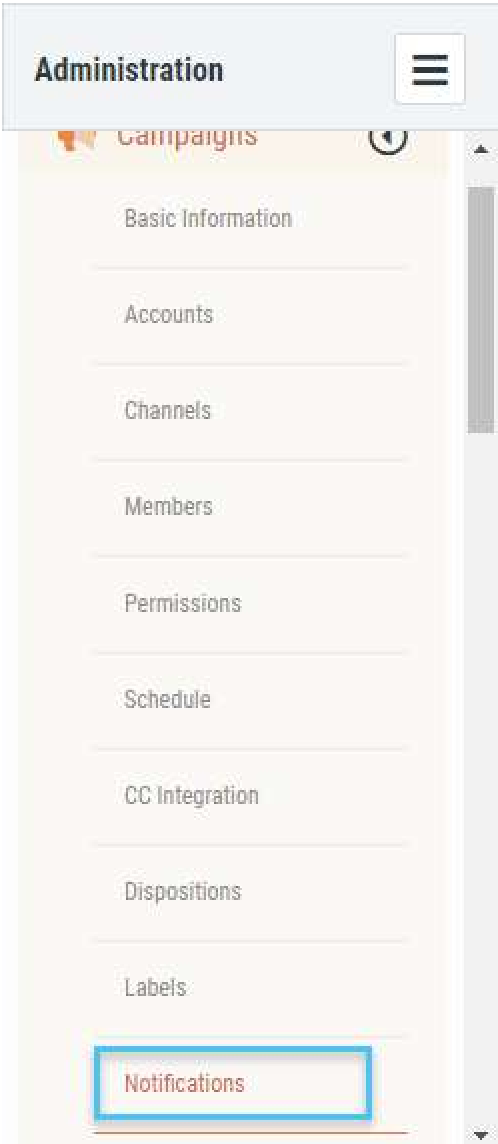
1. Go to the "*Configuration*" tab located at the top of the screen in the work environment in *OCC*.



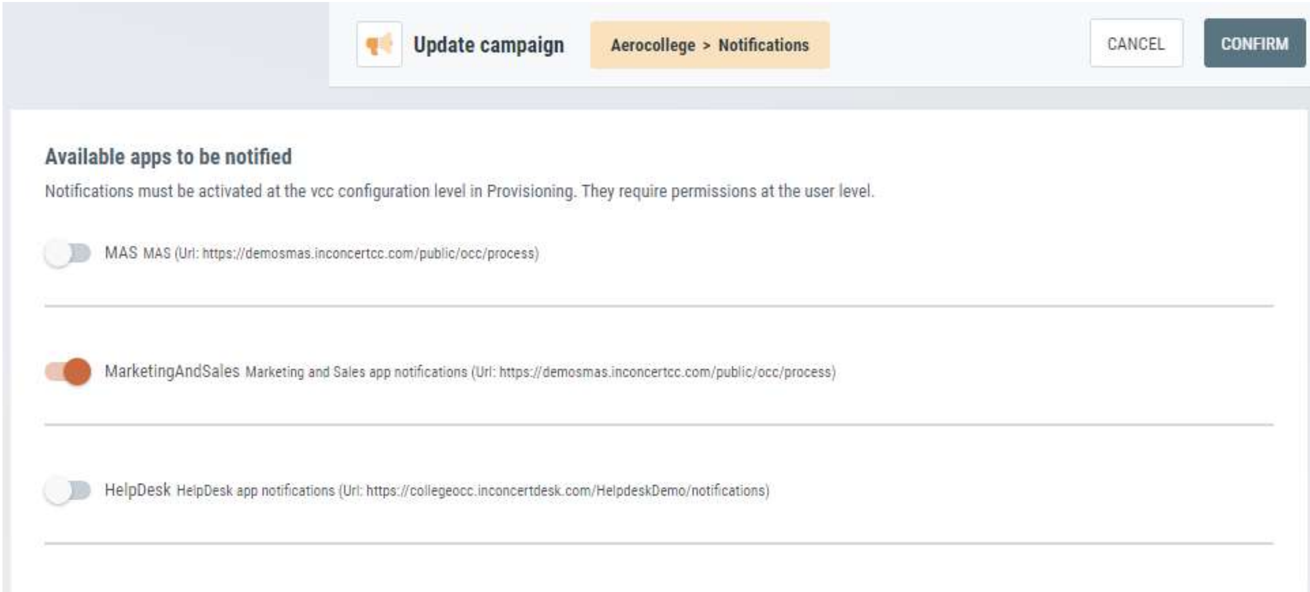
2. In the administration panel located on the left margin of the screen, click on the "*Campaigns*" tab 1 , then click the "*Edit*" button 2 associated with the campaign in which you want to activate notifications.



3. A list of sections related to the administration of the campaign will be displayed, click on the "*Notifications*" section:



4. First, *activate* the notifications for the campaign 1 , just click the check box. Then, enter the url 2 to which OCC will send the notifications of the events that you will configure in the next step.



In the case of a test environment, the following url is available to receive notifications: http://DOMINIO/inconcert /api /test_notifications/.

5. A list of notifications will be enabled, these will be sent to the url entered when the selected event(s) take place. To activate a notification, just click the checkbox corresponding to the event you want to notify.

6. To finish, click the "*SAVE*" button if you wish to or click the "*CANCEL*" button

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- How to associate an application from the App Store

Structure of Notification Messages

The messages sent in the notifications have a group of elements that are present in all messages and a group of elements that vary according to the channel or event being notified.

Generic elements of all channels/events:

Data_base

```
                clusterID                       = Id de la instalación
de la plataforma.
                id                                       = Id de
interacción.
                type                               = (CHAT, MAIL,
FACEBOOK, etc).
                vcc                                      = VCC.
                campaign                        = Campaña en la que se
atiende la interacción.
                account                              = Cuenta
configurada por la que ingresa o sale la interacción.
                attention_level                = id de Attention Level
por la que se asigna la interacción.
                page                               = Solo facebook e
Instagram.
                timestamp                       = Fecha Hora del
evento en formato fecha
                subtype                              = Segun el canal:

Instagram("MentionPost", "MentionComment", "NewPostComment",
"PageInboxNewMessage")
                                                                Facebook
("FanPageNewFeed", "NewPostComment",  "PageInboxNewMessage",
"InboxNewMessage", "FanPageNewFeed", "FanPageRateFeed")
                                                                 Twitter
("MENTION", "TWEET_REPLY", "QUOTED", "DIRECTMESSAGE", "EXTERNAL",
"SEARCH")
                timestampDouble                = Timestamp del evento
en formato EPOC
                contactId                       = Id de Contacto
                contactName                       = Nombre de Contacto
                agent                                = Id Agente que
atiende la interacción
```

- Incoming Notification:

```
NewIncoming
```

- Outgoing Notification:

```
NewOutgoing
```

- Incoming Message Notification

```
NewIncomingMessage
```

- utgoing Message Notification

```
NewOutgoingMessage
```

- Notification of Queued Interaction:

```
Queued
```

- Notification of Attended Interaction

```
Taken
```

- Notification of Interaction in WrapUp

```
WrapUp
```

- Notification of Closed Interaction:

```
Closed
```

- Notification of Transferred Interaction

```
Transferred
```

- Notification of Canceled Interaction:

Canceled

- Notification of Reopened Interaction

Reopen

- Interaction Deleted Notification

Removed

Attention Levels

- What are Attention Levels?
- How to define an Attention Level
- How to edit the users assigned to an Attention Level
- How to delete an Attention Level

What are Attention Levels?

Attention levels can be defined as groups of attending to the interactions, that is, depending on the operation of the Contact Center, the interactions can be assigned according to the attention levels that are defined in the campaign.

The Attention Levels can be shaped by the users according to their skills. Read about "How to define skills".

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- User search
- How to set up Messenger messaging
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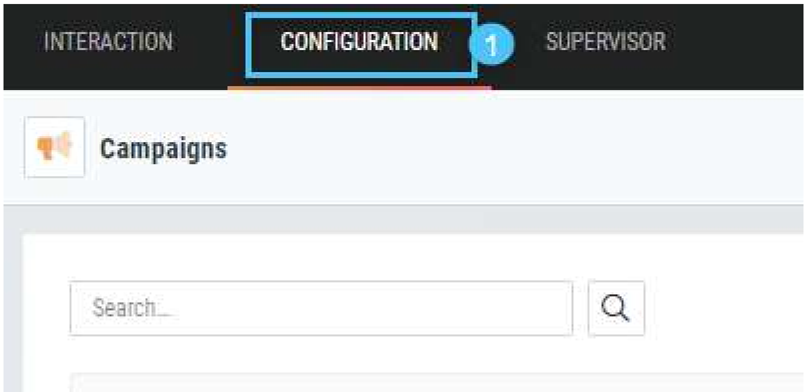
How to define an Attention Level

Attention levels can be used when an interaction is received that requires attention from a particular group of agents, that is, if you want the new interactions of an account to be attended by users belonging to a specific Attention Level, after creating it, you can associate it with the account.

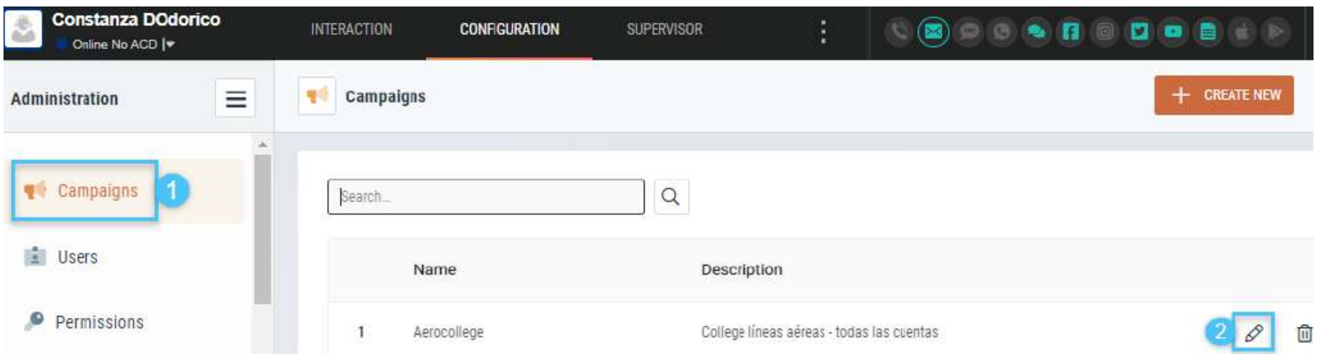
The attention levels are configured by campaigns.

To define an Attention Level:

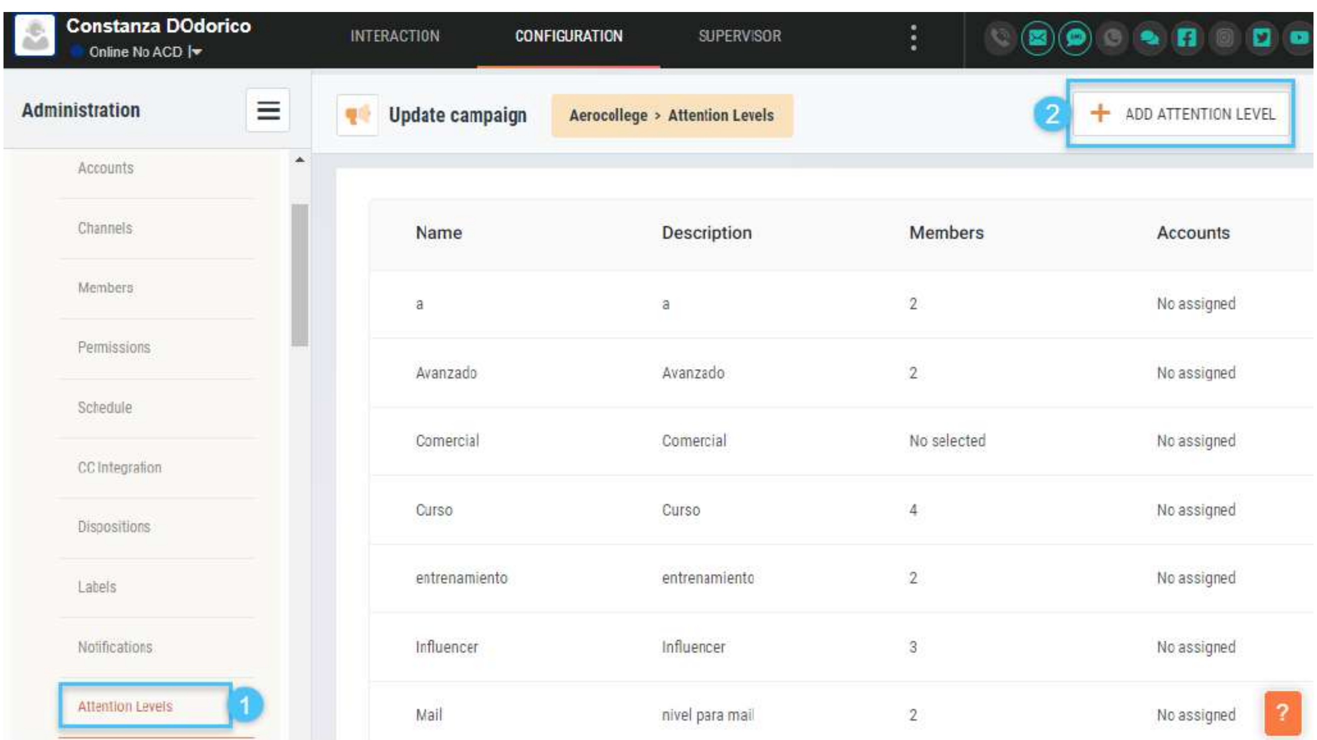
1. Go to the "Configuration" tab:



2. Click on the section "Campaigns" and then click the "Edit" button of the campaign where the attention level will be defined :

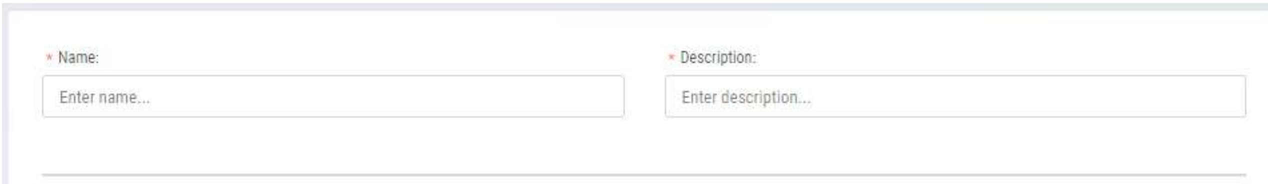


3. Click on the "Attention Levels" section of the campaign and then click the "NEW ATTENTION LEVEL" button :



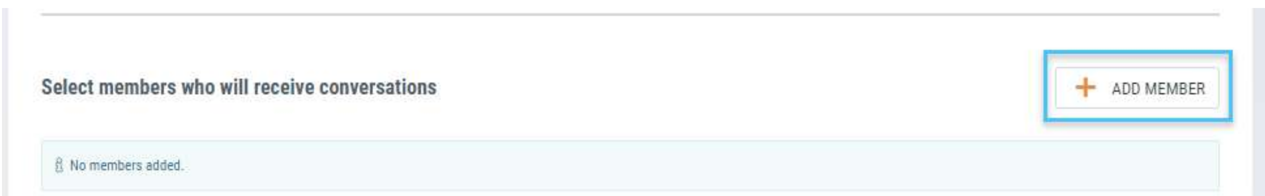
4. Enter the required data:

   a. **General information:**

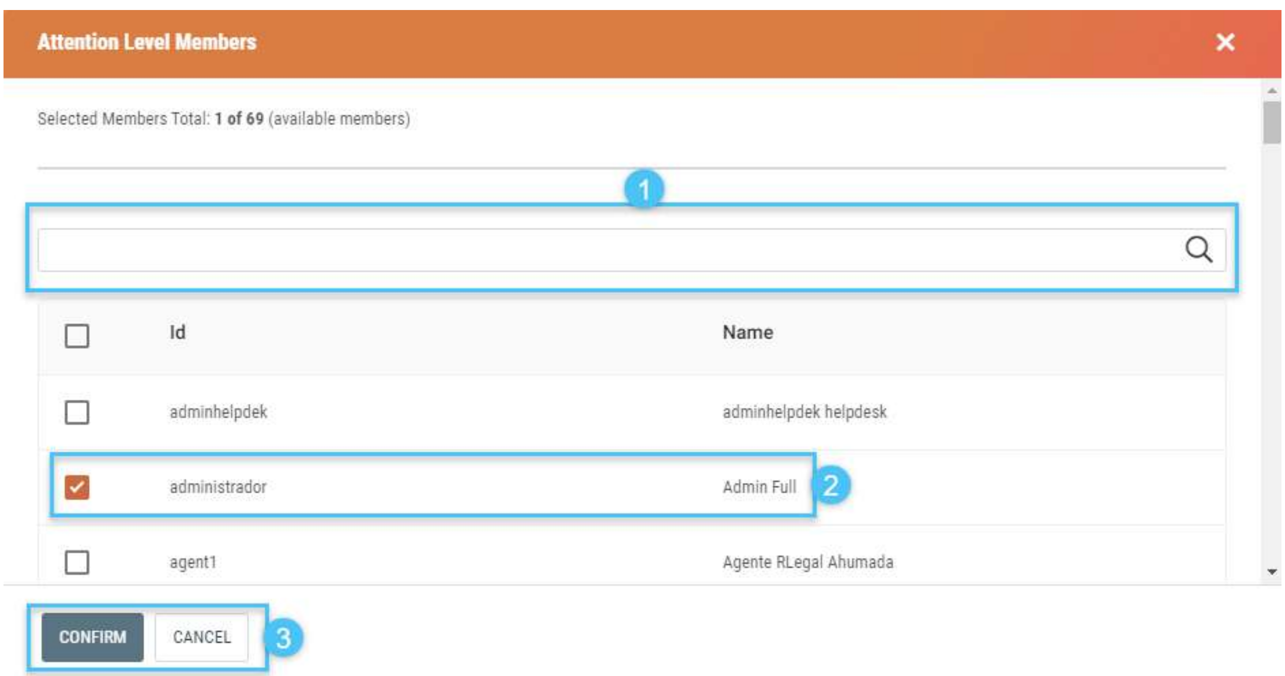


> **Name:** unique name that will identify the attention level in the system.
>
> **Description:** description of the attention level.

   b. Users:
   Assign users to the attention level by clicking the "UPDATE" button:

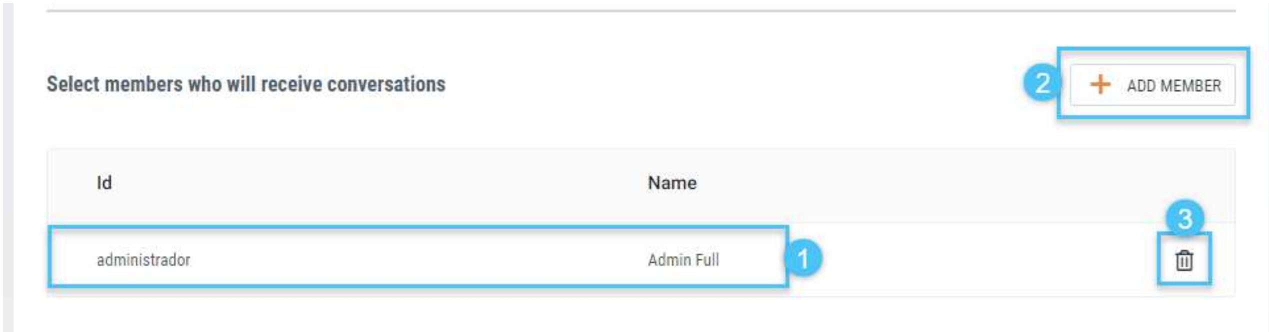


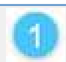
   c. The users associated with the campaign are displayed:



> 
>
> : search for the user to be assigned to the attention level.
>
> 
>
> : check the box of the desired user.
>
> 
>
> : click the "UPDATE" button to save the changes or "CLOSE" to cancel without saving the changes.

On assigning the user(s), the following is displayed:





: assigned users.

: click to continue assigning users to the attention level.

: click to remove the associated user.

5. After completing all the required fields, click the "CREATE" button to create the attention level.
6. To cancel the operation without saving the entered data, click the “CLOSE” button.

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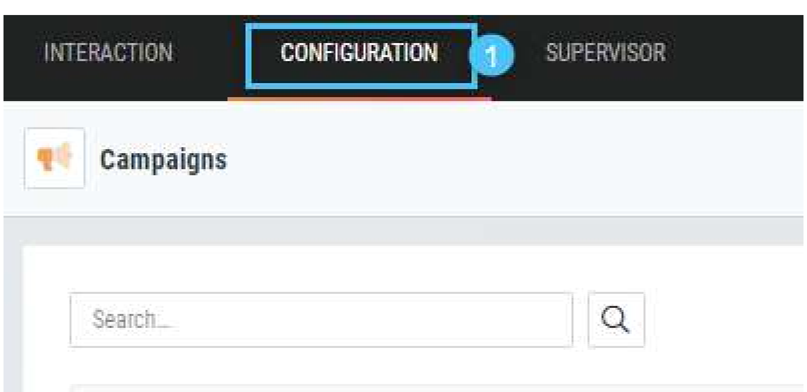
How to edit the users assigned to an Attention Level

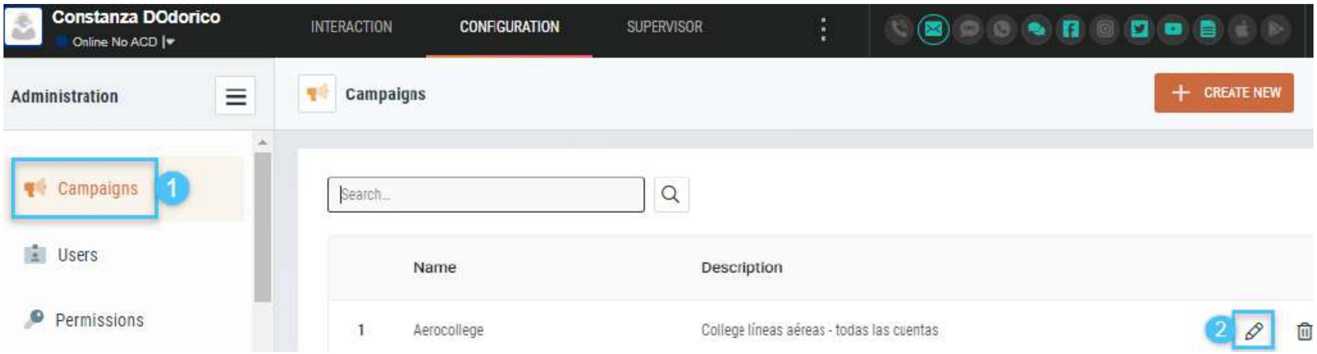
At any time you can edit the users assigned to an attention level, and in this way remove them or even assign more users if required. If a user who is attending to an interaction associated with the attention level is removed, they will be able to finish the interaction without inconvenience.

To edit the users assigned to an attention level:

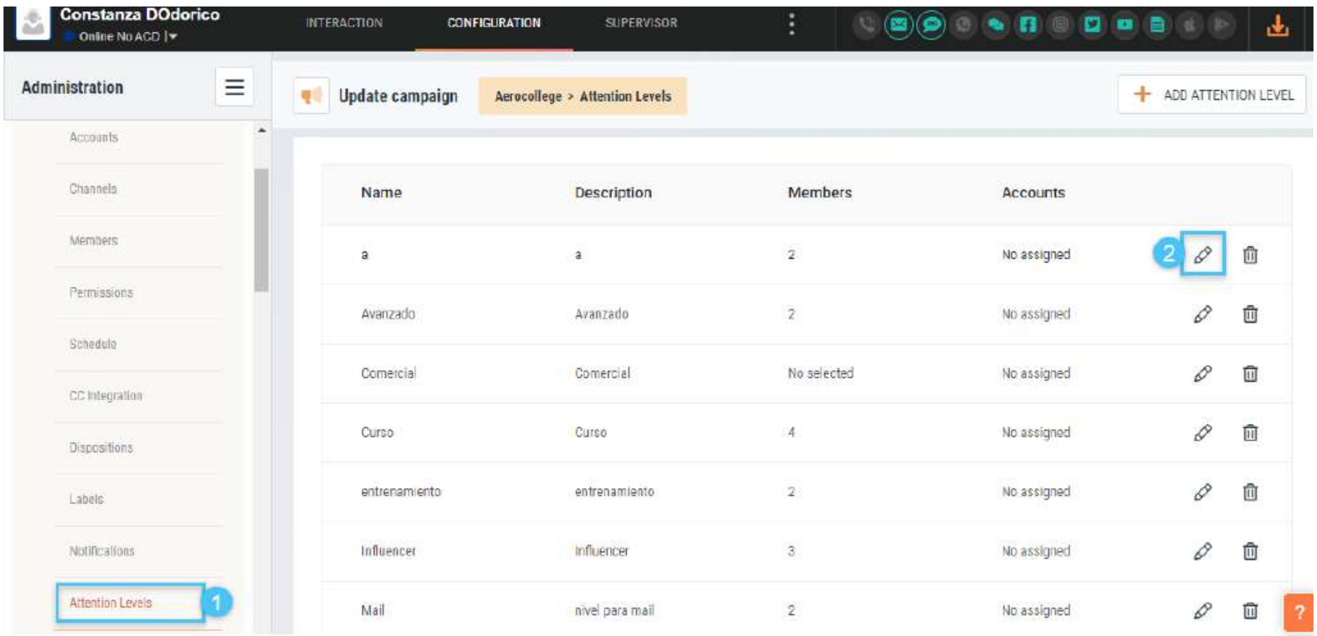
1. Go to the "Configuration" tab:



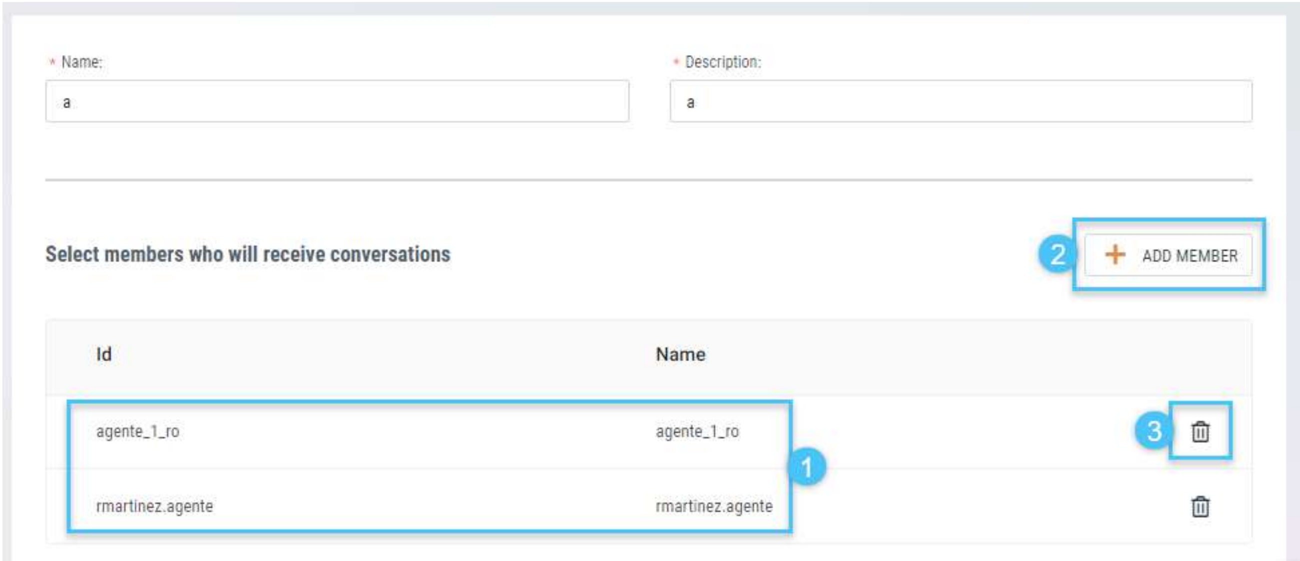
2. Click on the section "Campaigns" and then click the "Edit" button of the campaign where the attention level is defined :



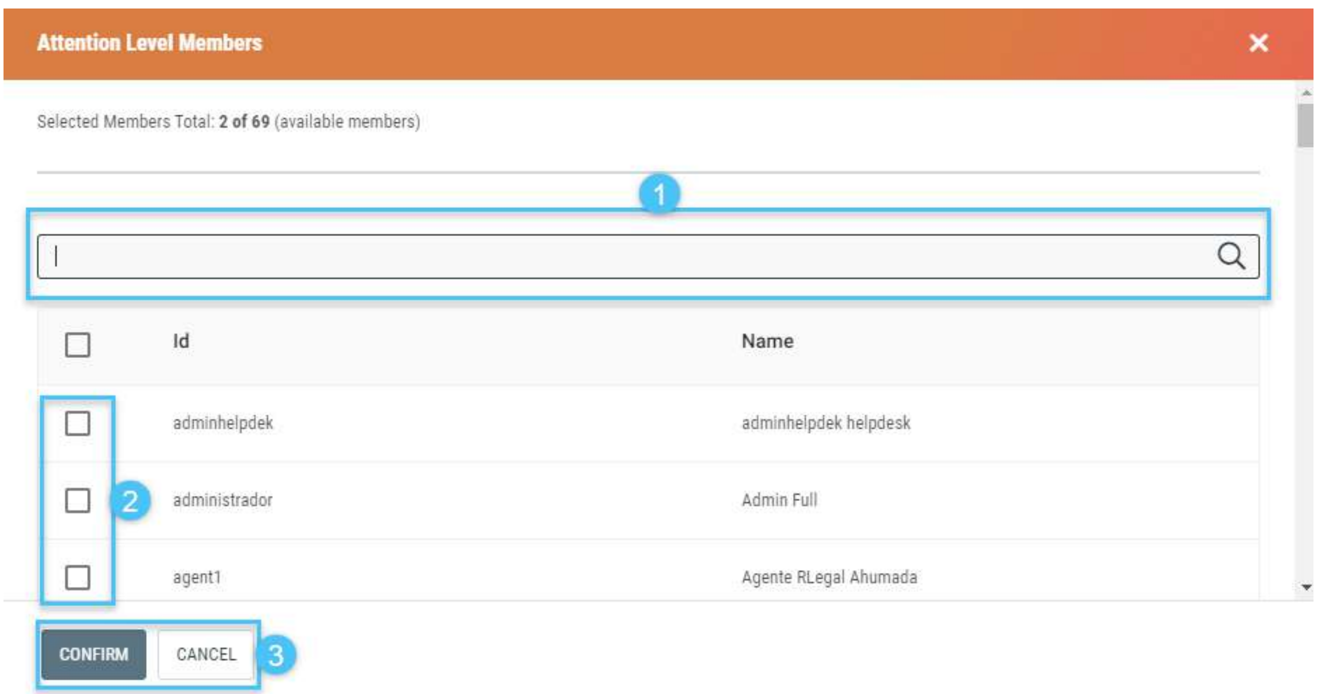
3. Click on the "Attention Levels" section of the campaign and then click the "Edit" button of the attention level :



4. The users assigned to the attention level are displayed , click the "UPDATE" button to edit them or the "Delete" button to remove them from the attention level :



5. If you click the "UPDATE" button in the previous step, you will be able to assign more users to the attention level or remove one that is already assigned:



1 : search for the user to be assigned/removed 2 : check the corresponding box to assign/remove users. 3 : click the "UPDATE" button to save the changes or "CLOSE" to cancel without saving the changes.

6. After making the modifications, click the "UPDATE" button to save the changes made to the attention level
7. To cancel the operation without saving any changes, click the "CANCEL" button.

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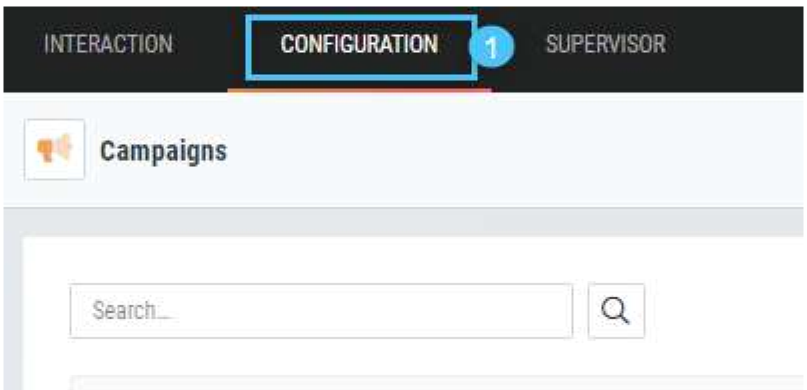
How to delete an Attention Level

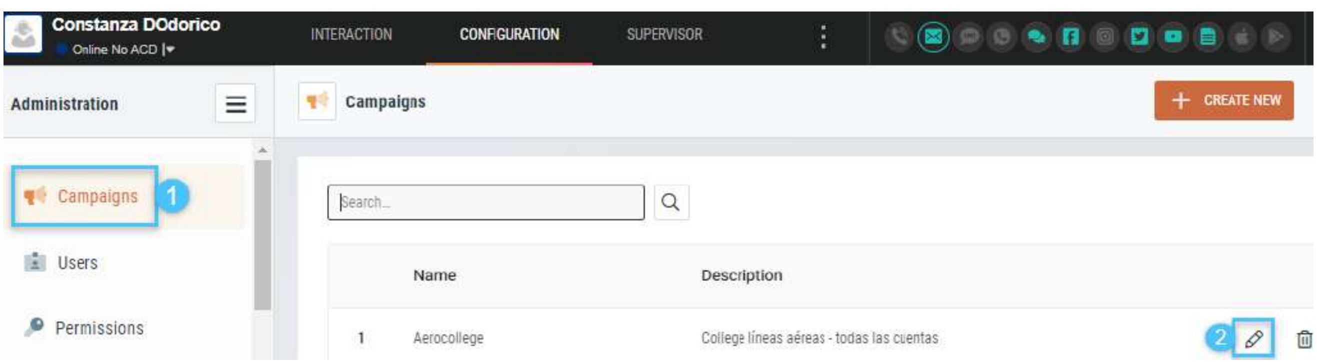
You can delete an attention level at any time you want, but you must first disassociate it from the accounts to which it has been assigned. To learn how to disassociate it, read: "How to associate Attention Levels to an Account".

To delete an attention level:

1. Go to the "Configuration" tab:

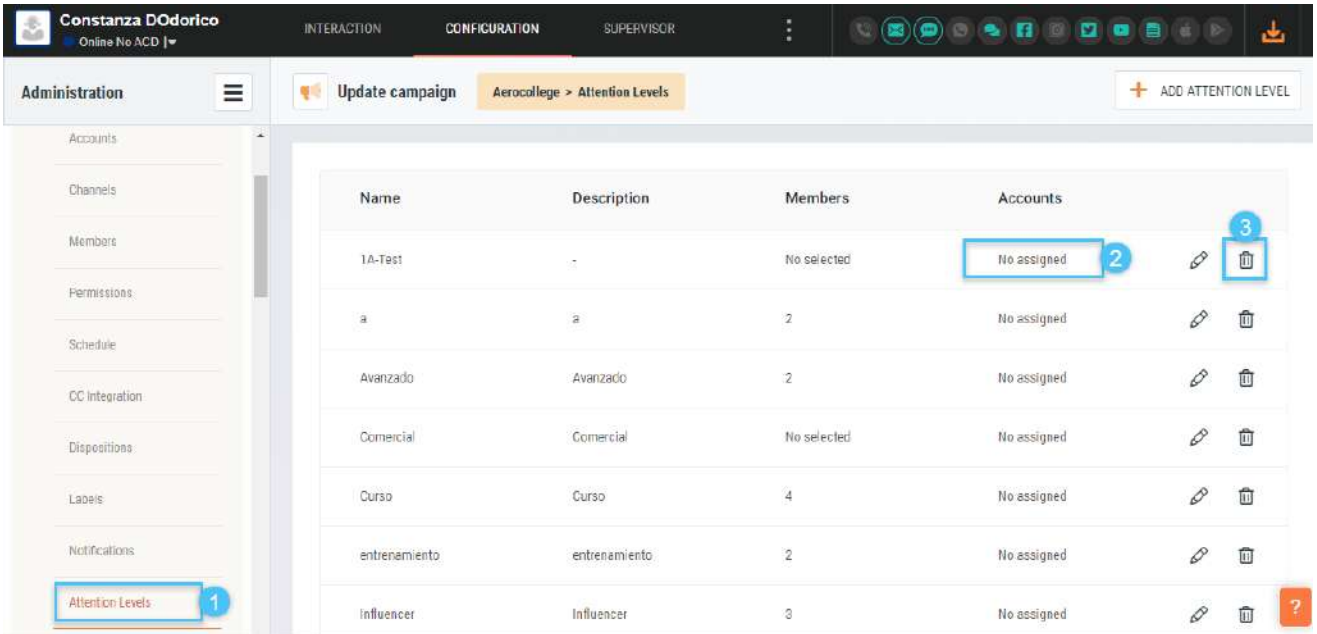


2. Click on the section "Campaigns" 1 and then click the "Edit" button of the campaign where the attention level will be deleted 2 :

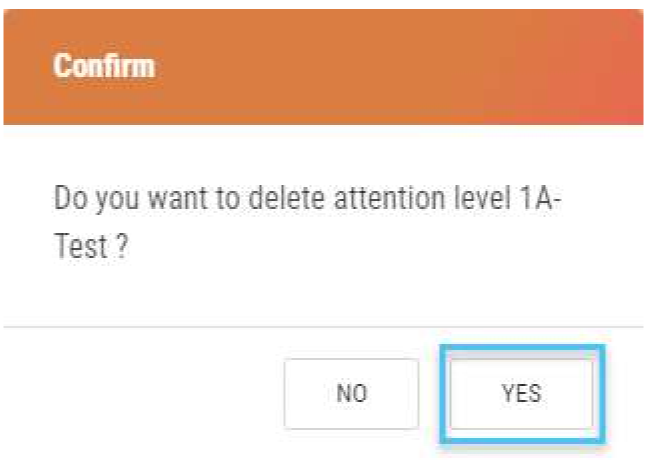


3. Click on the "Attention Levels" section of the campaign 1 , check that the attention level is not assigned to any account 2 and then click the "Delete" button for the attention level in question 3 :

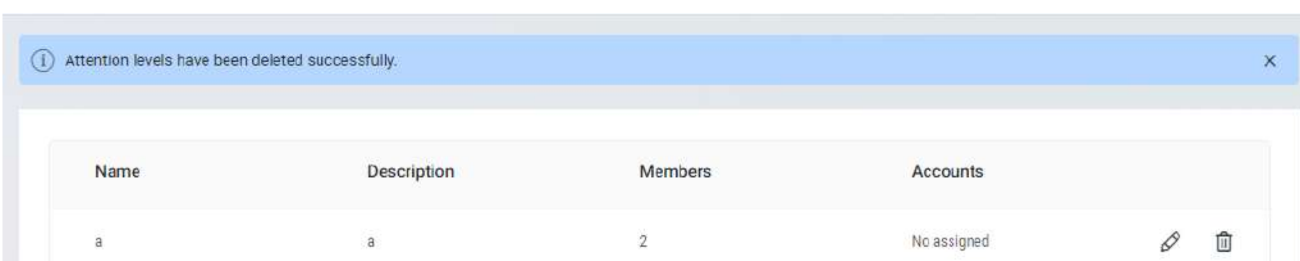
!http://inconcertcc.com/confluence/encabezado_confluence.jpg! Prueba de Texto



4. Click the "Yes" button to confirm the deletion of the attention level:



5. A message confirming successful deletion of the attention level is displayed:



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!http://inconcertcc.com/confluence/pie_confluence.jpg!

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Canned Messages

- What is a Canned Message and when is it used?
- How to create a Canned Message
- How to edit a Canned Message
- How to delete a Canned Message
- How to create a Canned Message Group
- How to edit a Canned Message Group

What is a Canned Message and when is it used?

A canned message is a predefined message that the Administrator can configure, to standardize criteria in the replies that are given to clients while attending to interactions.

Predefined messages can be used to enable agents to handle various common situations in a homogeneous way.

For example, welcome, waiting and goodbye messages, as well as auto-replies, can be configured.

To create a canned message, read about "How to create a Canned Message".

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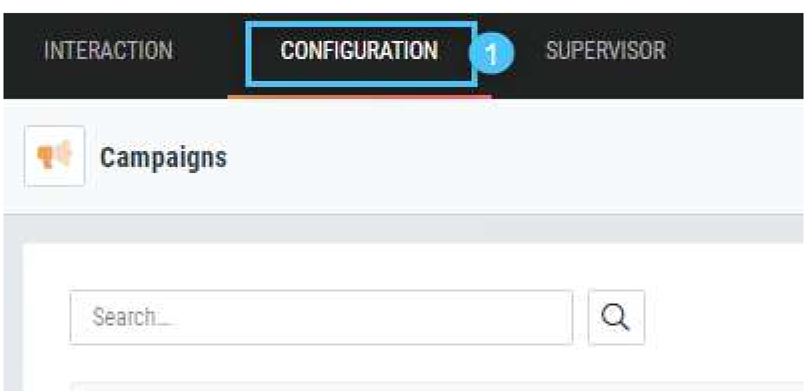
How to create a Canned Message

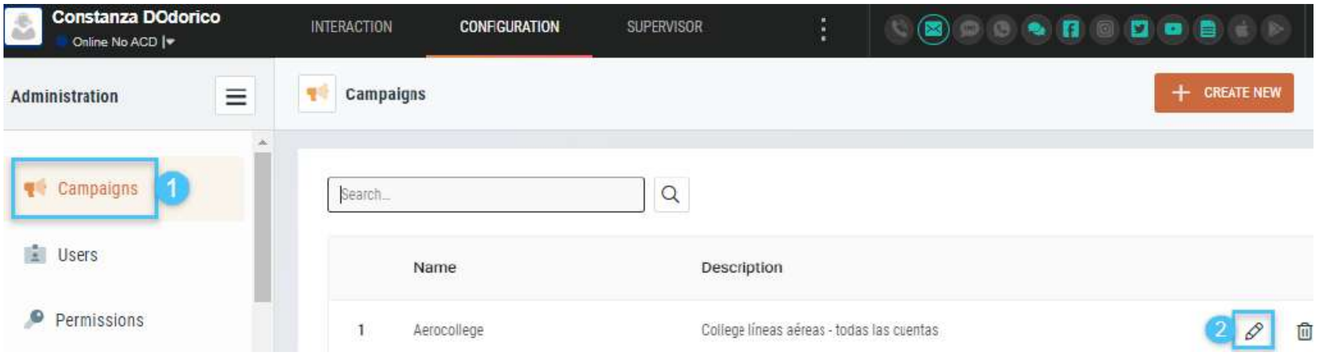
Predefined messages can be employed so that users deal with frequent situations in a standard way. These messages are canned messages previously created by the System Administrator.

To create a canned message:

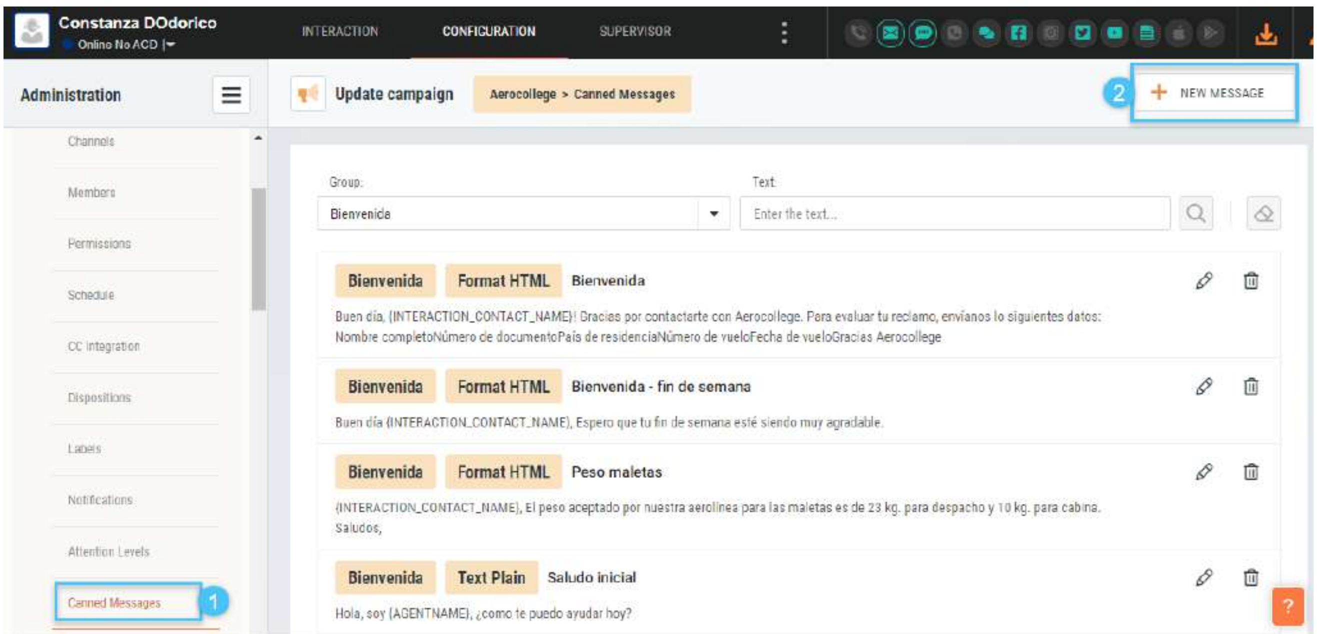
1. Go to the "Configuration" tab:



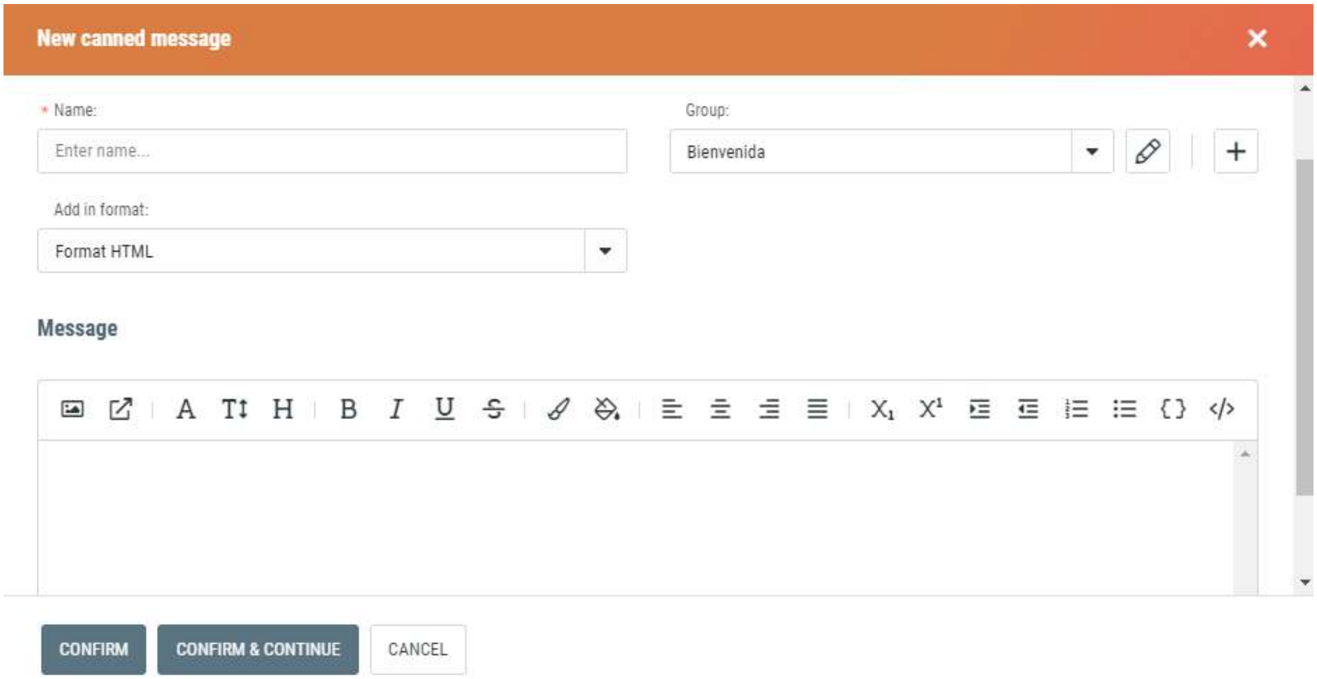
2. Click on the section "Campaigns" and then click the "Edit" button of the campaign where the canned message will be created :



3. Click on the "Canned Messages" section of the campaign 1 and then click the button "NEW MESSAGE" 2 :



4. Enter the required data:



Group: Select a group previously created or create a new group by clicking the button.

Name: Unique name that will identify the canned message in the system.

Add format

HTML format: select this option if you want to add html code to the canned message.

The option is valid only for use in the web chat channel.

Plain text: Select this option to write the canned message using plain text.

Message: To compose the message you can use the basic tools of a text editor and the variables available.

5. After completing all the required fields, click the "CREATE" button to create the canned message
6. To save the new canned message and continue creating another, click the "CREATE & CONTINUE" button.
7. To cancel the operation without saving the entered data, click the "CLOSE" button

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- User search
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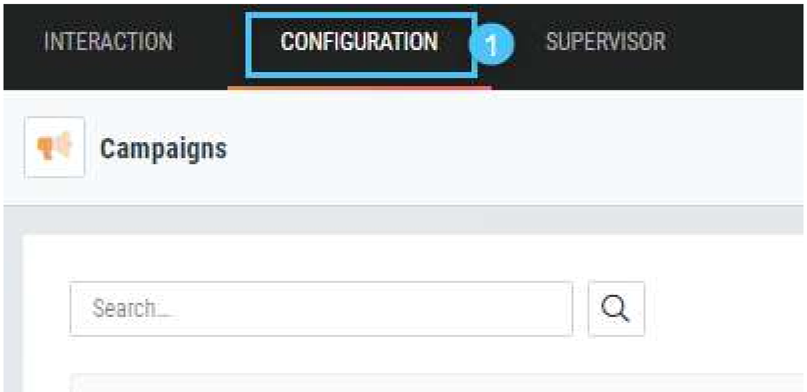
- How to associate an application from the App Store

How to edit a Canned Message

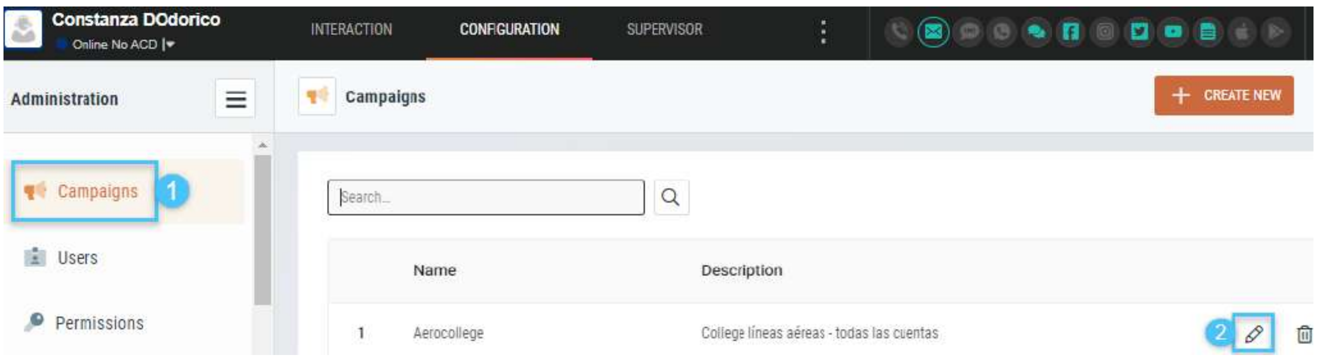
After creating a canned message, you can edit it; either to change the name or make an adjustment to the text of the message.

To edit a canned message:

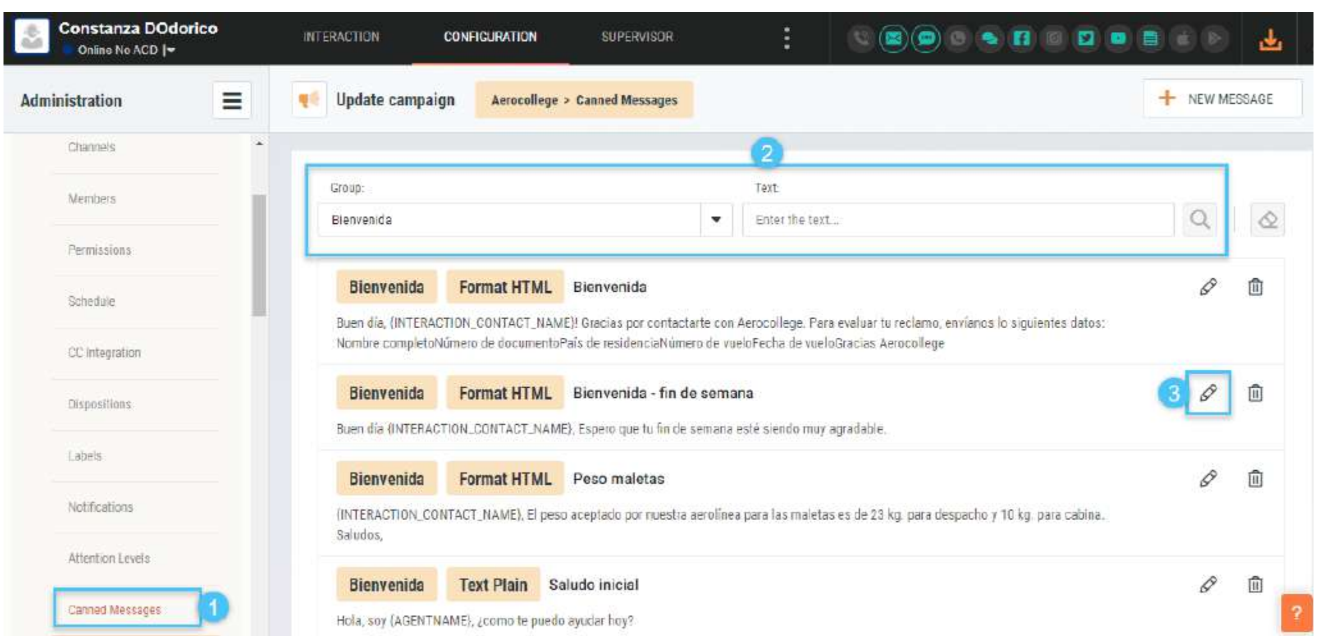
1. Go to the "Configuration" tab:



2. Click on the section "Campaigns" and then click the "Edit" button of the campaign for which the canned message will be edited :



3. Click on the "Canned Messages" section of the , filter by group or by canned message text and then campaign and click the "Edit" button of the canned message :



4. After making the modifications, click the "UPDATE" button to save the changes made to the canned message.
5. To cancel the operation without saving the modifications, click the "CLOSE" button.

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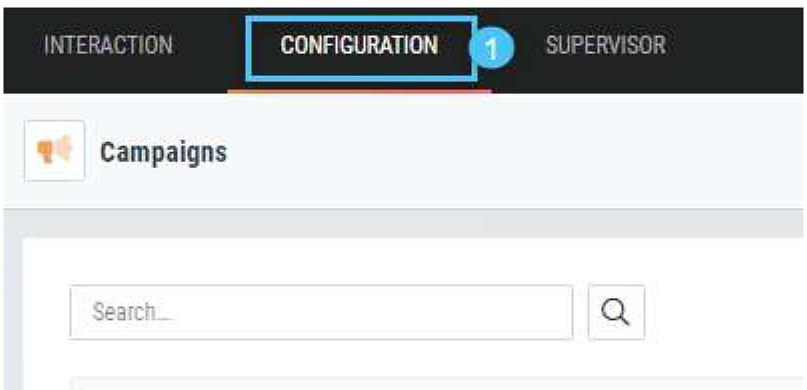
- How to associate an application from the App Store

How to delete a Canned Message

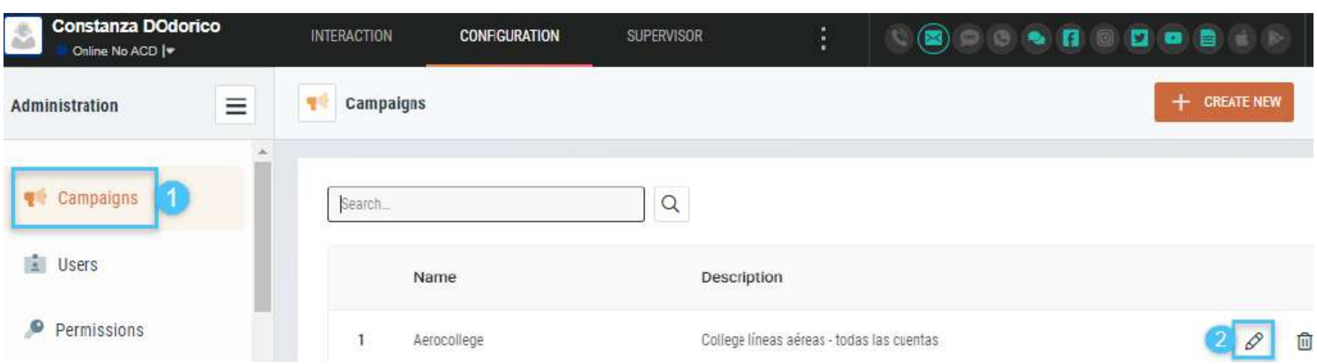
If you want to remove a canned message, either because it will be replaced by another or simply because it will no longer be used, you must delete it; and thus the operators will not be able to make use of it.

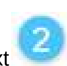
To delete a canned message:

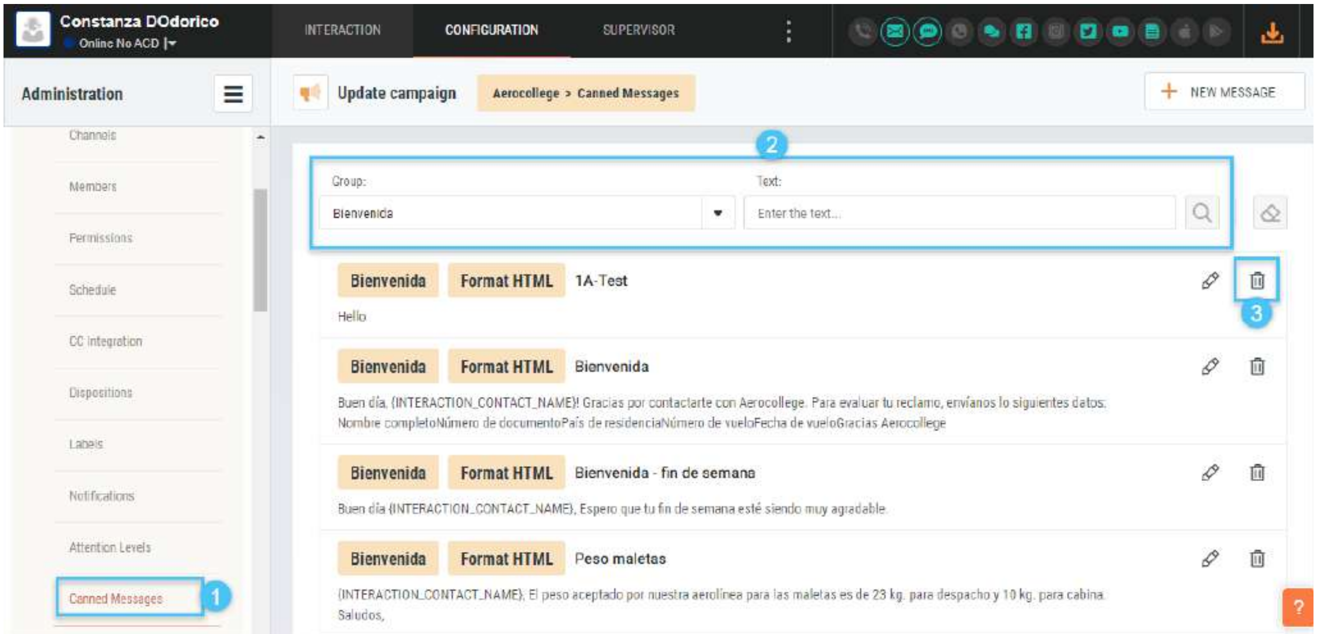
1. Go to the "Configuration" tab:



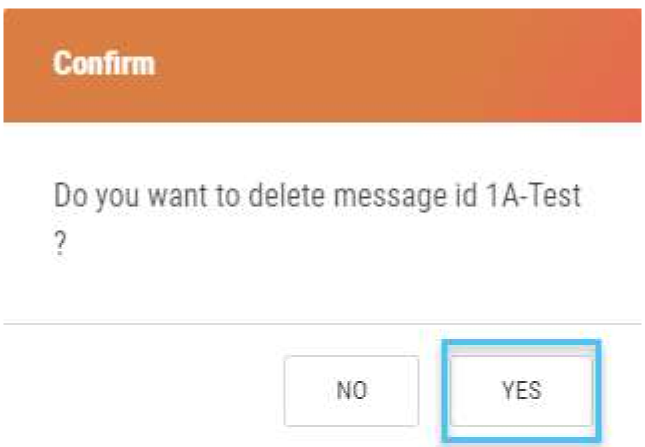
2. Click on the section "Campaigns"  and then click the "Edit" button of the campaign from which the canned message will be deleted  :



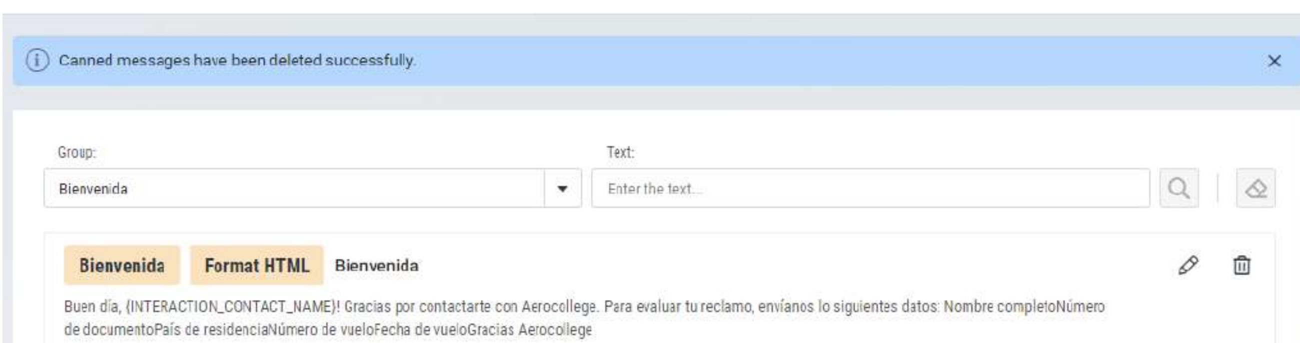
3. Click on the "Canned Messages" section of the  , filter by group or by canned message text  and then campaign and click the "Delete" button of the canned message  :



4. Click the "Yes" button to confirm the deletion of the canned message:



5. A message is displayed to confirm the successful deletion of the canned message:



Related Articles

User search

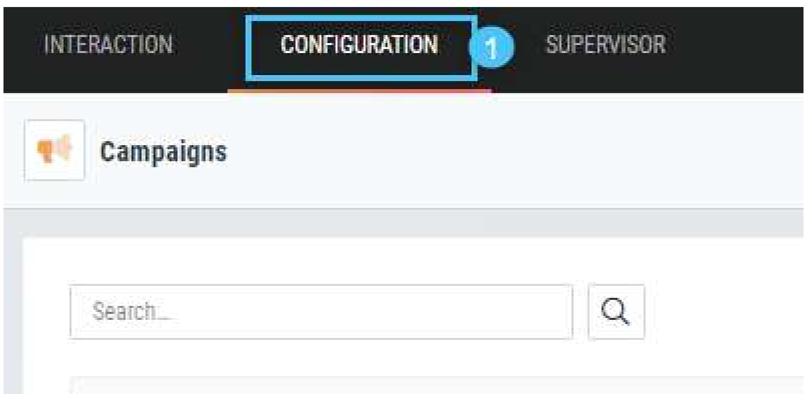
How to set up Messenger messaging
How to associate a YouTube account
How to associate an application from Google Play Store
How to associate an application from the App Store

How to create a Canned Message Group

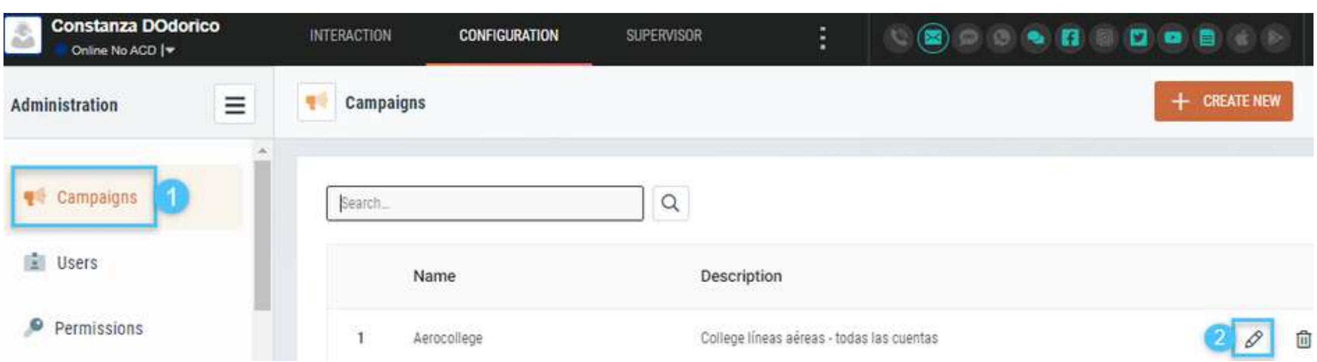
If you want to group the canned messages, given the relationship between them, you can create groups. The messages that have been created for analogous situations can then be grouped. For example, if you want to group the Welcome messages.

To create a canned message group:

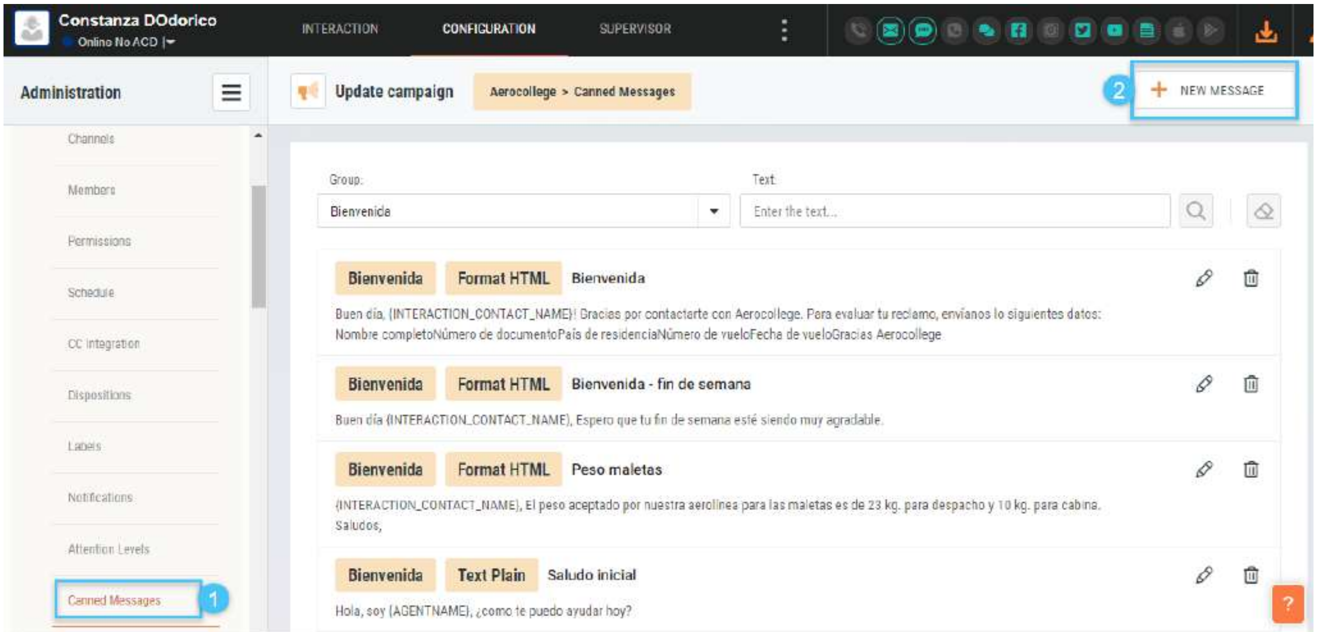
1. Go to the "Configuration" tab:



2. Click on the section "Campaigns" 1 and then click the "Edit" button of the campaign where the canned message group will be created 2 :

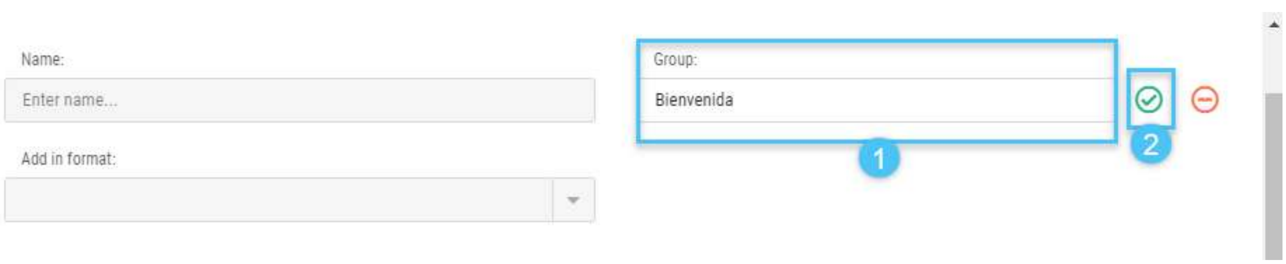


3. Click on the "Canned Messages" section of the campaign 1 and then click the button "NEW MESSAGE" 2 :



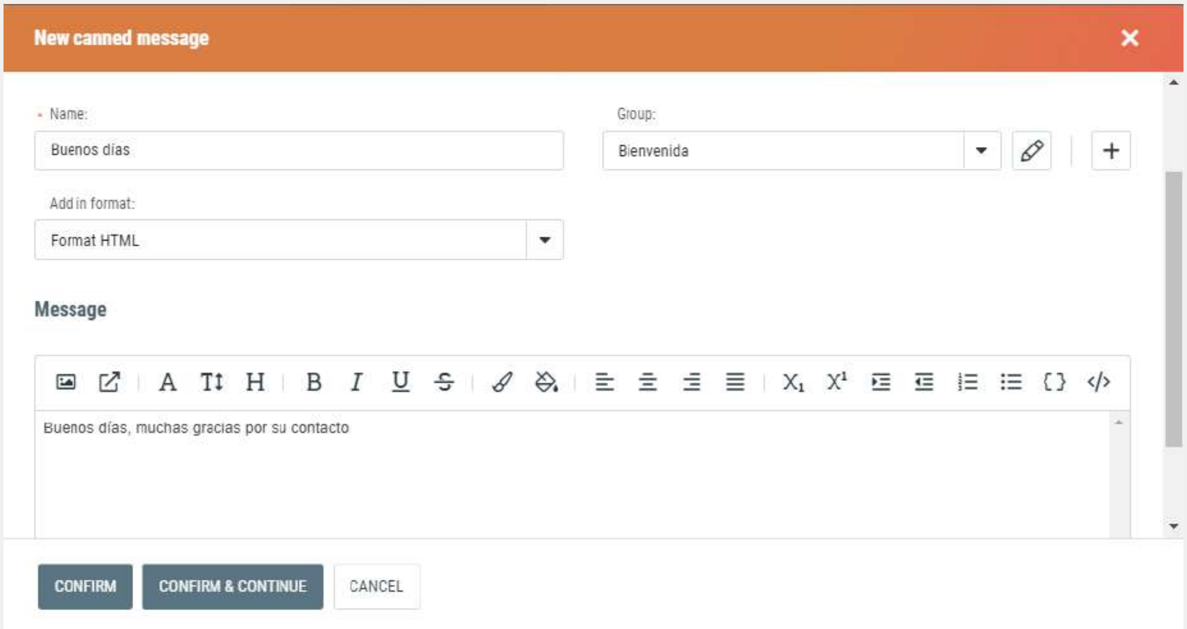
4. Click the "New" button:

5. Enter the name of the group  and click the "Save" button  :



To exit without saving, click the "Cancel" button

Once the group is created, the canned message can be created and thus associated with it, as follows:



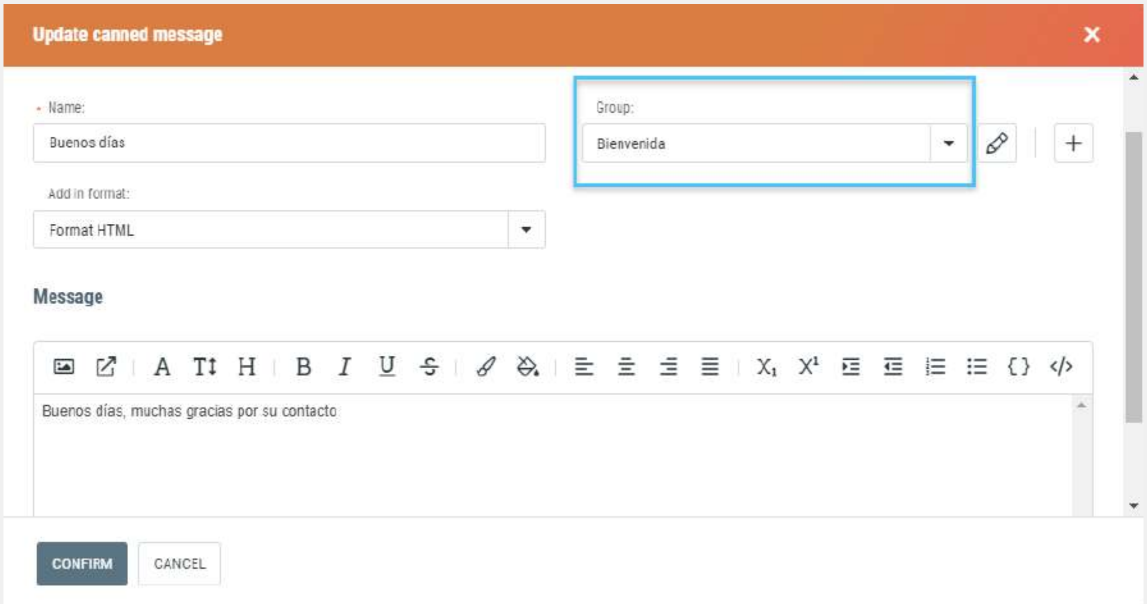
Click the "UPDATE" button to save the changes or "CLOSE" to cancel without saving the changes.

The canned message associated with the group would look like this:

Canned Messages can also continue to be associated with the created group, as follows:

a. Click the "Edit" button of the canned message that you want to associate with a group:

b. Select the desired group from the drop-down list:



Click the "UPDATE" button to save the changes or "CLOSE" to cancel without saving the changes

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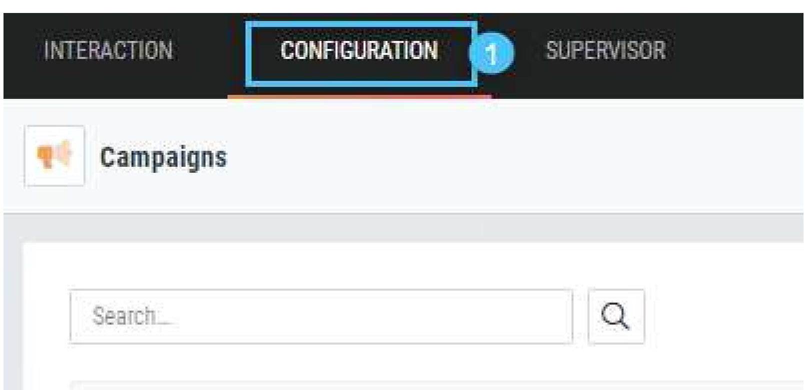
How to edit a Canned Message Group

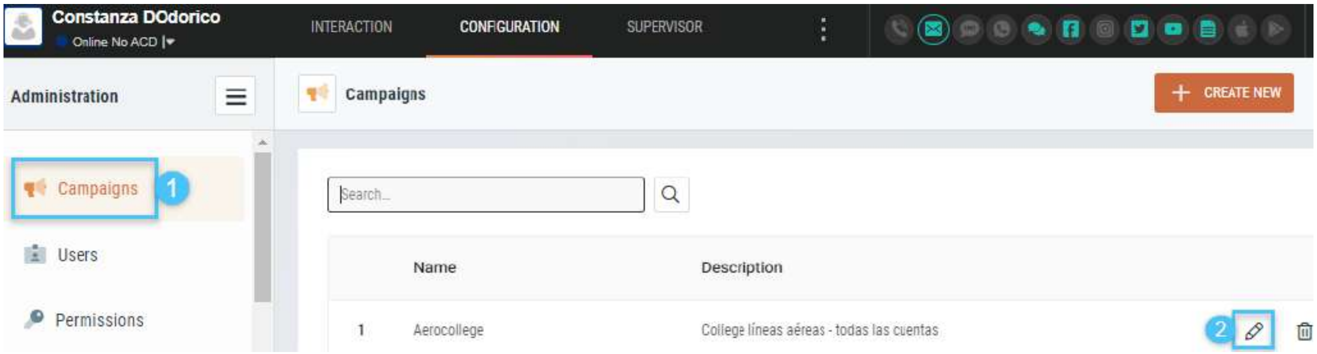
After creating a canned message group, you can edit it to change the name.

To edit a canned message group:

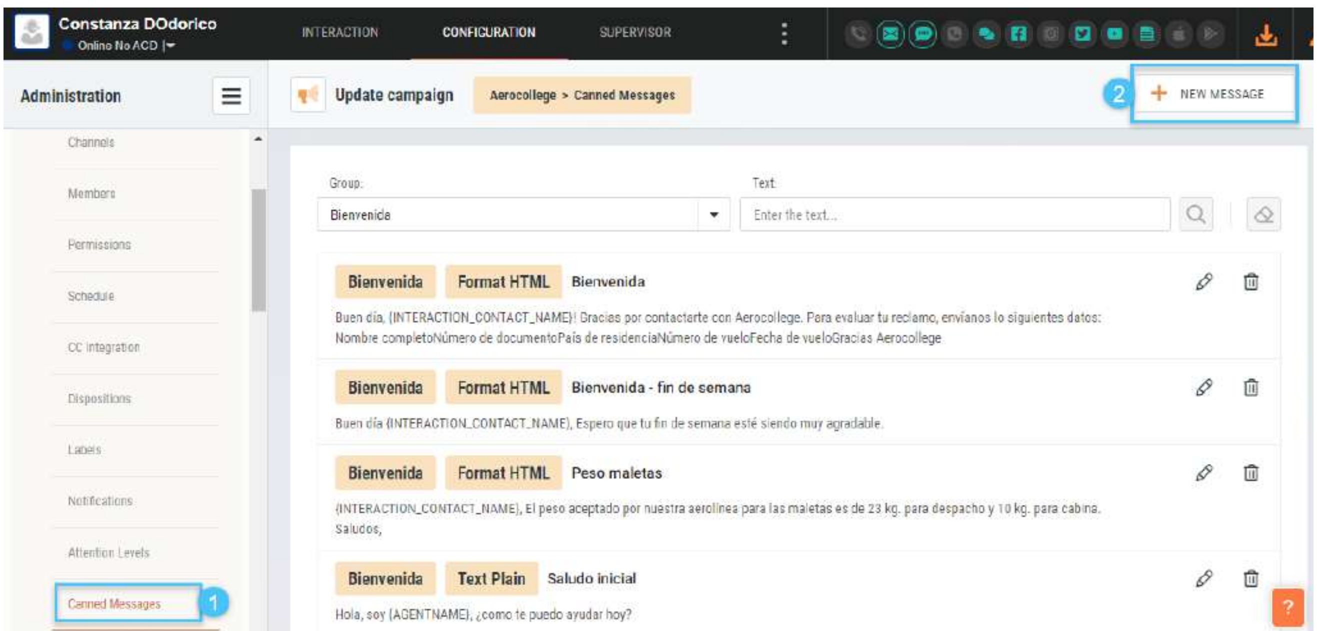
1. Go to the "Configuration" tab:



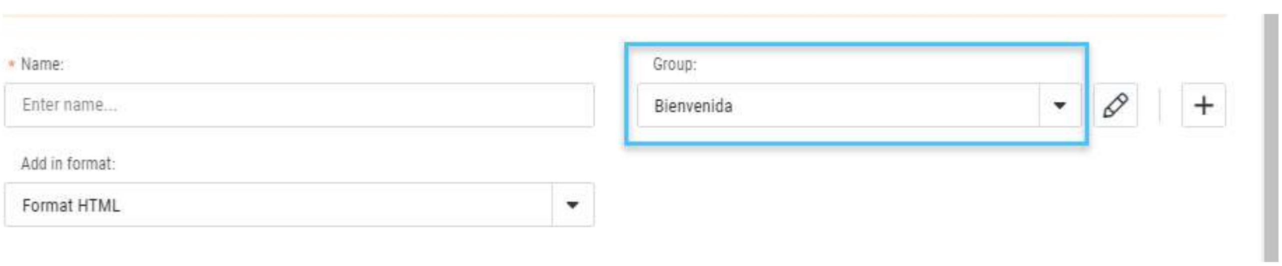
2. Click on the "Campaigns" section" 1 and then click the "NEW MESSAGE" button of the campaign where the canned message group will be edited 2 :



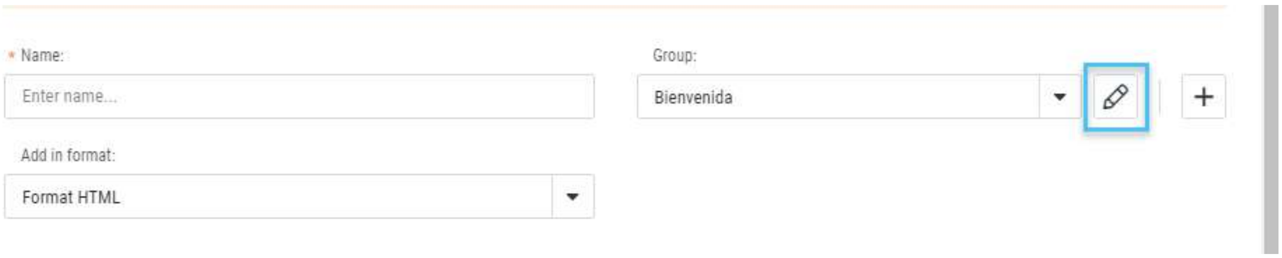
3. Click on the "Canned Messages" section of the campaign 1 and then click the button "NEW MESSAGE" 2 :



4. Select the group to edit from the drop-down list:



5. Click the "Edit" button:



6. After making the modifications, click the "Save" button to save the changes in the canned message group.
7. To cancel the operation without saving the modifications, click the "Cancel" button.

Related Articles

- User search
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Rules

- What are the rules for?
- How to define a new rule
- How to edit a rule
- How to delete a rule
- How to change the priority of a rule

What are the rules for?

The rules are used to apply certain conditions (filters), previously defined by the administrator, to the new inbound or outbound interactions in the communication channels and accounts that are associated with your campaigns. These filters allow the system to automatically perform various actions on the interactions, such as ending them, escalating them or changing their priority.

Once these automatic actions have been performed on the desired interactions, they can also be tagged, depending on the tags defined for your campaign.

To define a rule, see "How to define a new rule".

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- User search
- How to set up Messenger messaging
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- How to associate an application from Google Play Store
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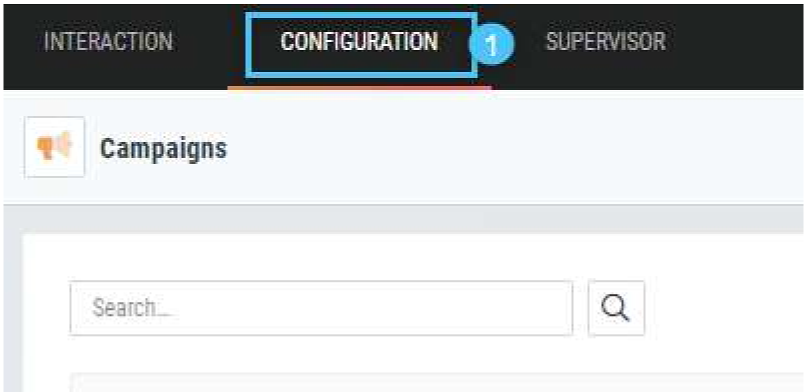
How to define a new rule

Before defining a new rule, you must be clear about its scope, that is, know to which of your campaign accounts and communication channels you will apply the rule. Bear in mind that it will be applied to all interactions meeting the conditions you set when you define it.

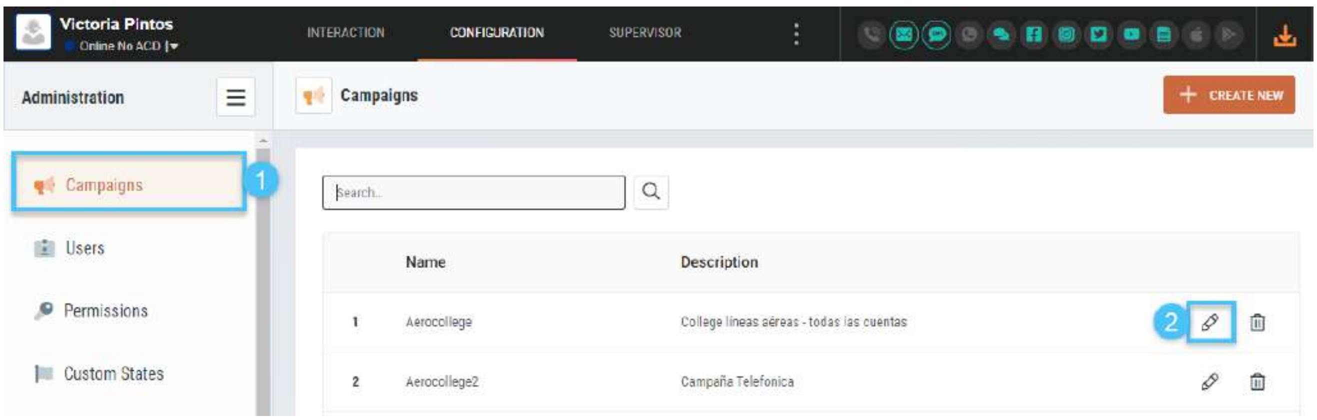
> ⚠ When defining a rule, by default it will be the one with the lowest priority with regard to those already created; in other words, it will be the last rule to be applied. For information on how to change rule priority, see "How to change the priority of a rule".

To define a new rule:

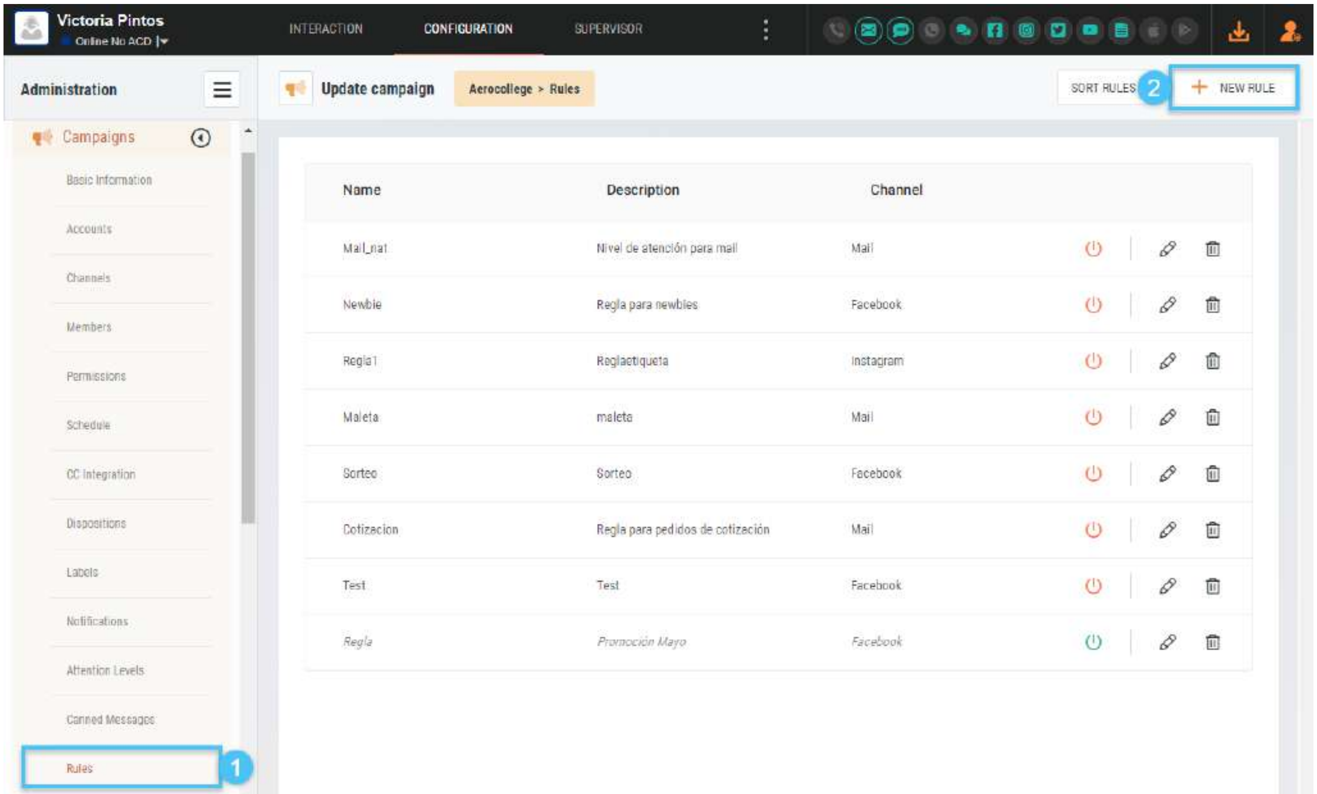
1. Go to the "Configuration" tab:



2. Click on the "Campaigns" section and then click the "Edit" button for the campaign for which the rule will be defined :

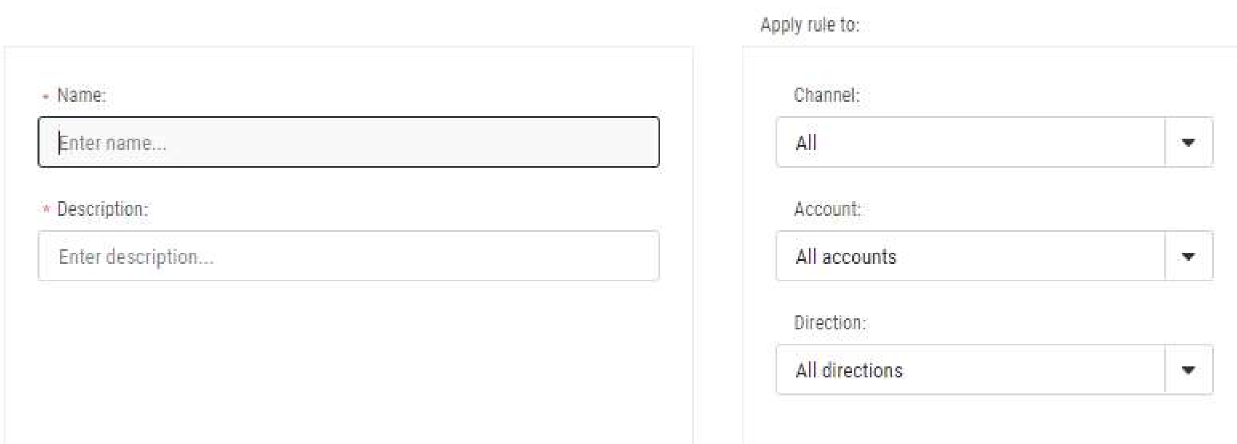


3. Click on the "Rules" section of the campaign and then click the "NEW RULE" button :



4. Enter the required data:

   a. Identification and scope of the rule:



Name: name that will identify the rule in the system.

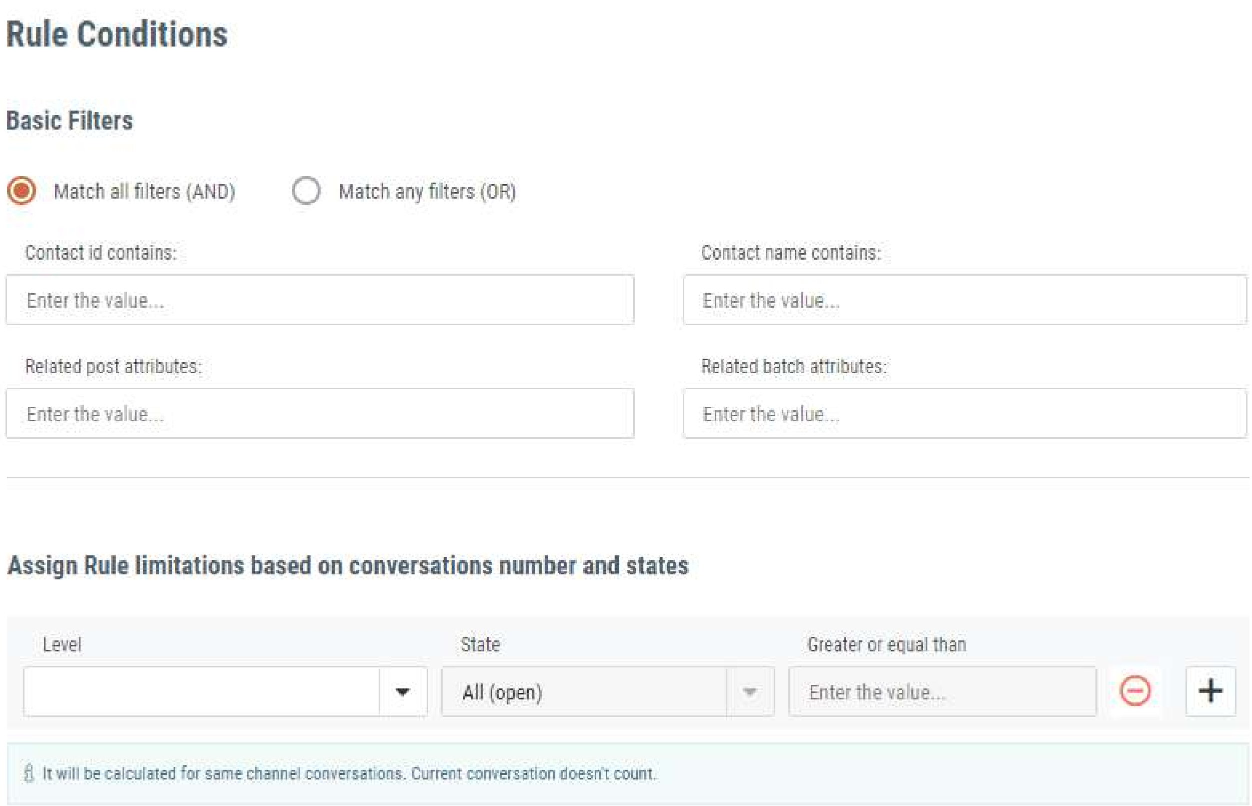
Description: description of the rule.

Channel: from the drop-down list, select the communication channel to which you will apply the rule. The options are: All, Call, Contact Form, Web Chat, Facebook, Email and Twitter. If you select the Facebook or Twitter channel, you must then indicate the type of interaction and the page (Facebook) to which the rule will apply.

Account: from the drop-down list, select the account associated with the communication channel selected in the previous step, to which the rule will be applied.

Address: from the drop-down list, select whether the rule will apply to all inbound and outbound interactions.

b. **Conditions of the rule:**



You must check the relevant box to indicate whether the condition for applying the rule is that the interactions comply with all the filters defined without exception (All filters (and)), or whether it should be applied when the interactions comply with at least one defined filter (**Any filter (or)**).

Depending on the communication channel to which the rule should apply, you can enter various filters:

Filter for call

Contact ID contains: the contact identifier is a full or partial match to the one entered.

Contact Name contains: the contact name is a full or partial match to the one entered.

Filter for contact forms

Contact ID contains: the contact identifier is a full or partial match to the one entered.

Contact Name contains: the contact name is a full or partial match to the one entered.

Addresses: the address provided by the contact matches one of the addresses entered. *Multiple addresses must be separated by ";".*

Pre-existing controls: information obtained via pre-existing controls on your site matches the conditions set. These controls are set up when creating the Contact Form account.

Captured fields: the names of the controls in the Web Designer application match the conditions set.

Filters for Web Chat

Contact ID contains: the contact identifier is a full or partial match to the one entered.

Nombre de contacto contiene: el nombre de contacto coincide de forma parcial o total con el ingresado.

Addresses: the address provided by the contact matches one of the addresses entered. Multiple addresses must be separated by ";".

Was transferred: when checking this box, you must indicate the campaign and account from which the interaction was transferred to apply the rule.

Pre-existing controls: information obtained via pre-existing controls on your site matches the conditions set. These controls are set up when creating the Web Chat account.

Captured fields: the names of the controls in the Web Designer application match the conditions set.

Filters for Facebook

Contact ID contains: the contact identifier is a full or partial match to the one entered.

Contact Name contains: the contact name is a full or partial match to the one entered.

From: the username of the source Facebook account matches one of those entered. *Multiple usernames must be separated by ";".*

Hashtag: the Facebook message contains a certain hashtag that matches the one entered. Remember that the hashtag must be written as a single word, i.e., without any spaces.

Contains text: the text of the Facebook message is a full or partial match to the one entered. *The search is performed on the content and sender of the message.*

Not contains text: the text of the Facebook message is neither a full nor a partial match to the one entered. *The search is performed on the content and sender of the message.*

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Filters for Mail

Contact ID contains: the contact identifier is a full or partial match to the one entered.

Contact Name contains: the contact name is a full or partial match to the one entered.

From: the source email account matches one of those entered. *Multiple email accounts must be separated by ";".*

To (includes CC and CCO): the destination email account matches one of those entered. *Multiple email accounts must be separated by ";".*

Subject contains: the subject of the email is a full or partial match to the one entered.

Contains text: the text of the email is a full or partial match to the one entered. *The search is performed on the email subject, message and addresses.*

Not contains text: the text of the email is neither a full nor a partial match with the one entered. *The search is performed on the email subject, message and addresses.*

Has attachment: checking this box will apply the rule to emails with attachments.

Filters for Twitter

Contact ID contains: the contact identifier is a full or partial match to the one entered.

Contact Name contains: the contact name is a full or partial match to the one entered.

From: the username of the source Twitter account matches one of those entered. *Multiple usernames must be separated by ";".*

Hashtag: the Twitter message contains a certain hashtag that matches the one entered. Remember that the hashtag must be written as a single word, i.e., without any spaces.

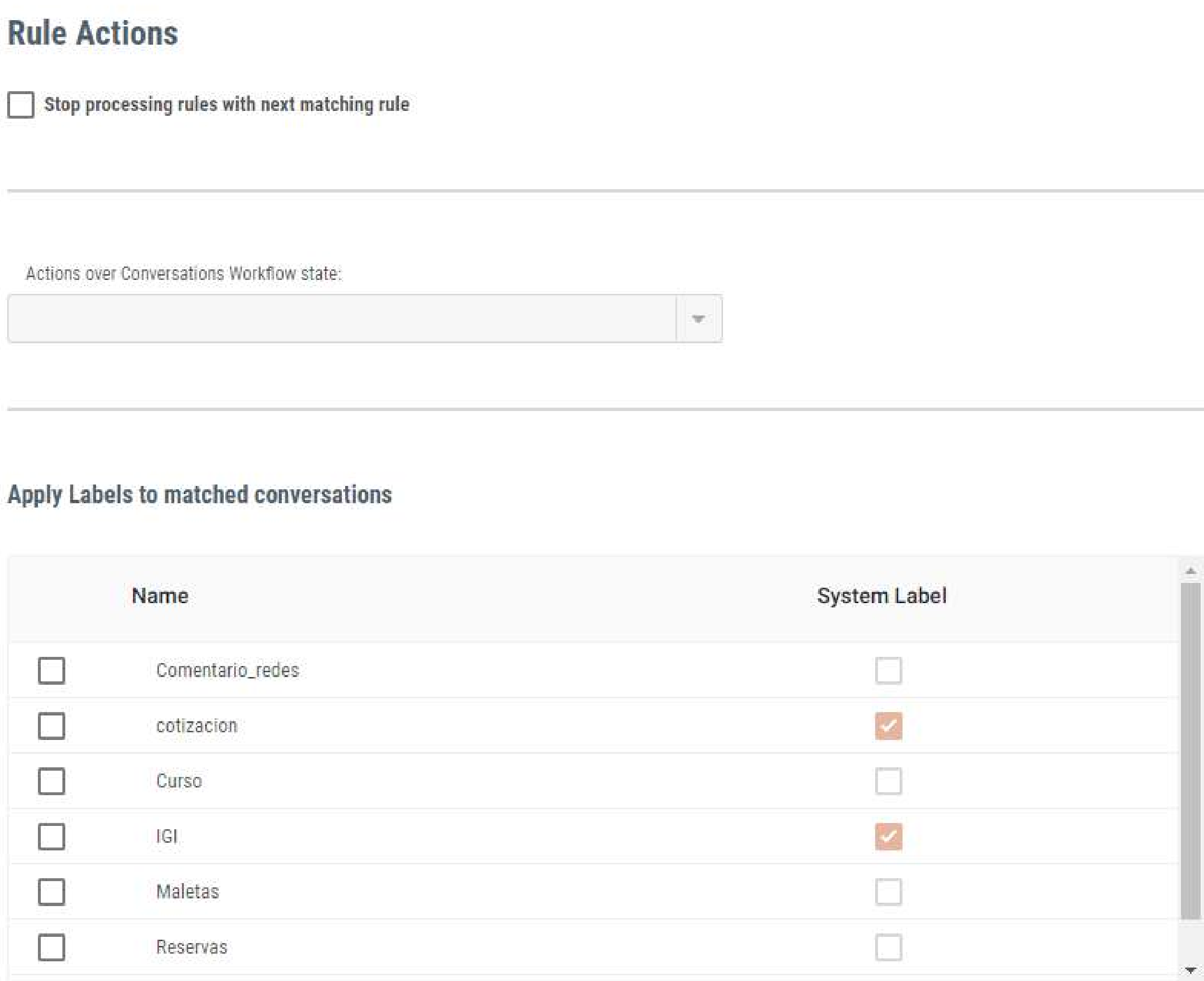
Countries: the country selected in the contact's Twitter account settings matches one of those entered. *Multiple countries must be separated by ";".*

Languages: the language selected in the contact's Twitter account settings matches one of those entered. You must enter the first two letters of the language, for example for English, enter "en". *Multiple languages must be separated by ";".*

Contains text: the text of the Twitter message is a full or partial match to the one entered. *The search is performed on the message's content and participants.*

Not contains text: the text in the Twitter message is neither a full nor a partial match to the one entered. *The search is performed on the message's content and participants.*

c. **Rule actions:**



Do not process any more rules: by checking this box, no other rules with a lower priority will be applied to interactions that meet the conditions of this rule. For information on how to change rule priority, see "How to change the priority of a rule".

Actions: from the drop-down list, select the action to be carried out with interactions meeting the conditions of this rule.

Apply Labels: check the box(es) for the tag(s) to be applied to interactions meeting the conditions of this rule.

5. After filling in all the fields required, click the "CREATE" button to create the rule.
6. To cancel the operation without saving the entered data, click the “CANCEL” button.

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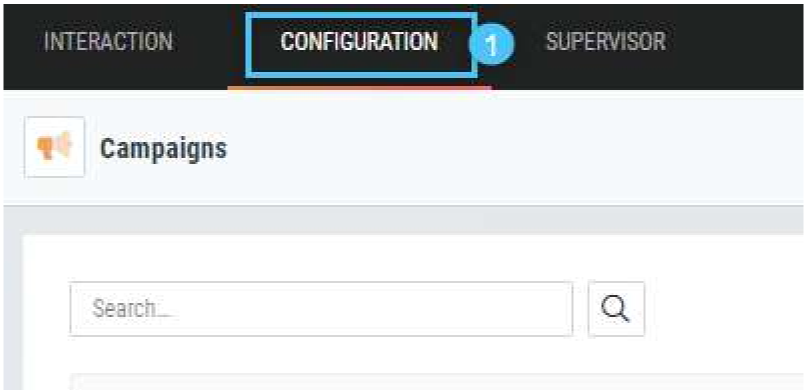
How to edit a rule

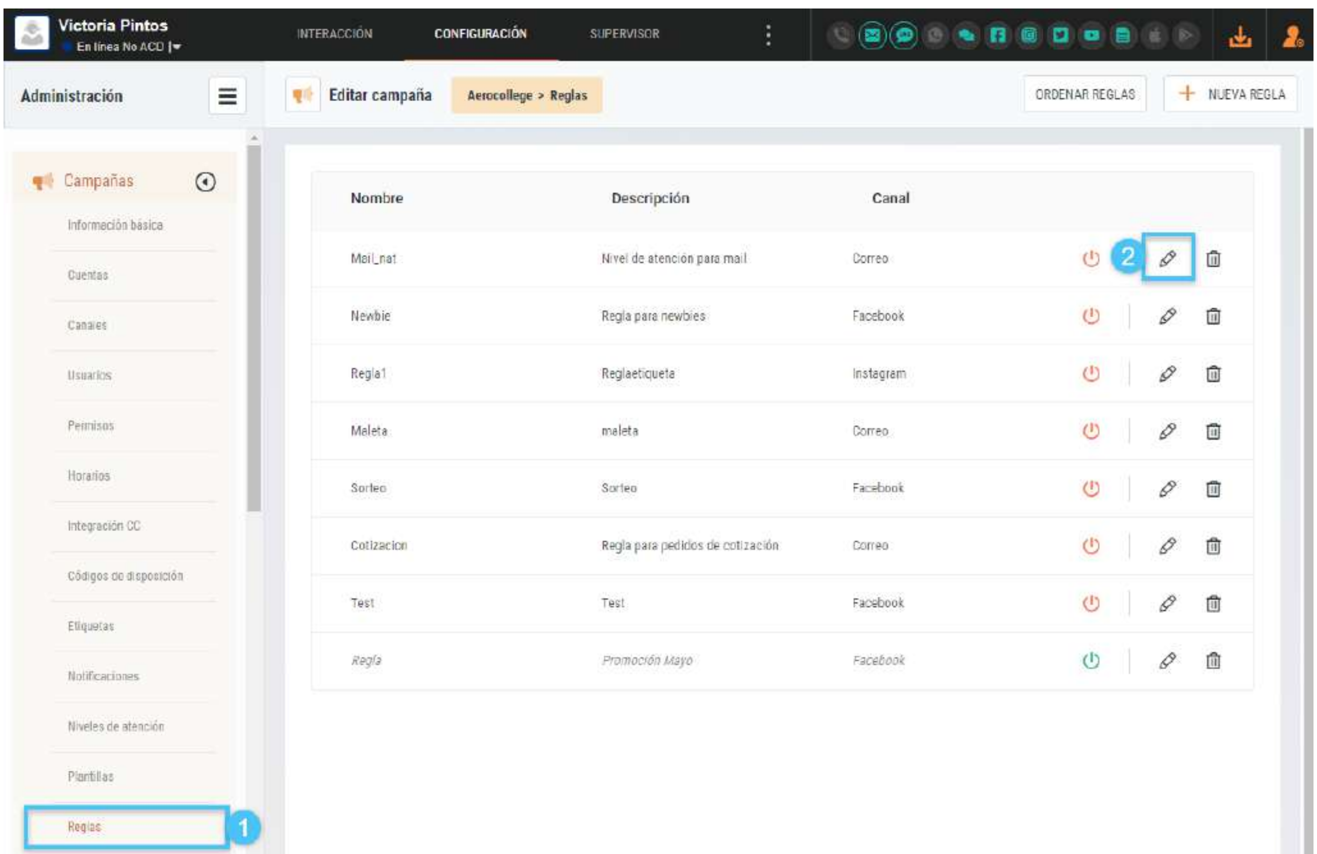
After defining a rule, you can edit it whenever you like to make changes or adjustments to it, such as redefining the scope, changing the conditions (filters) for applying the rule, changing the action to be carried out for interactions that comply with the rule or applying/removing applied labels.

To edit a rule:

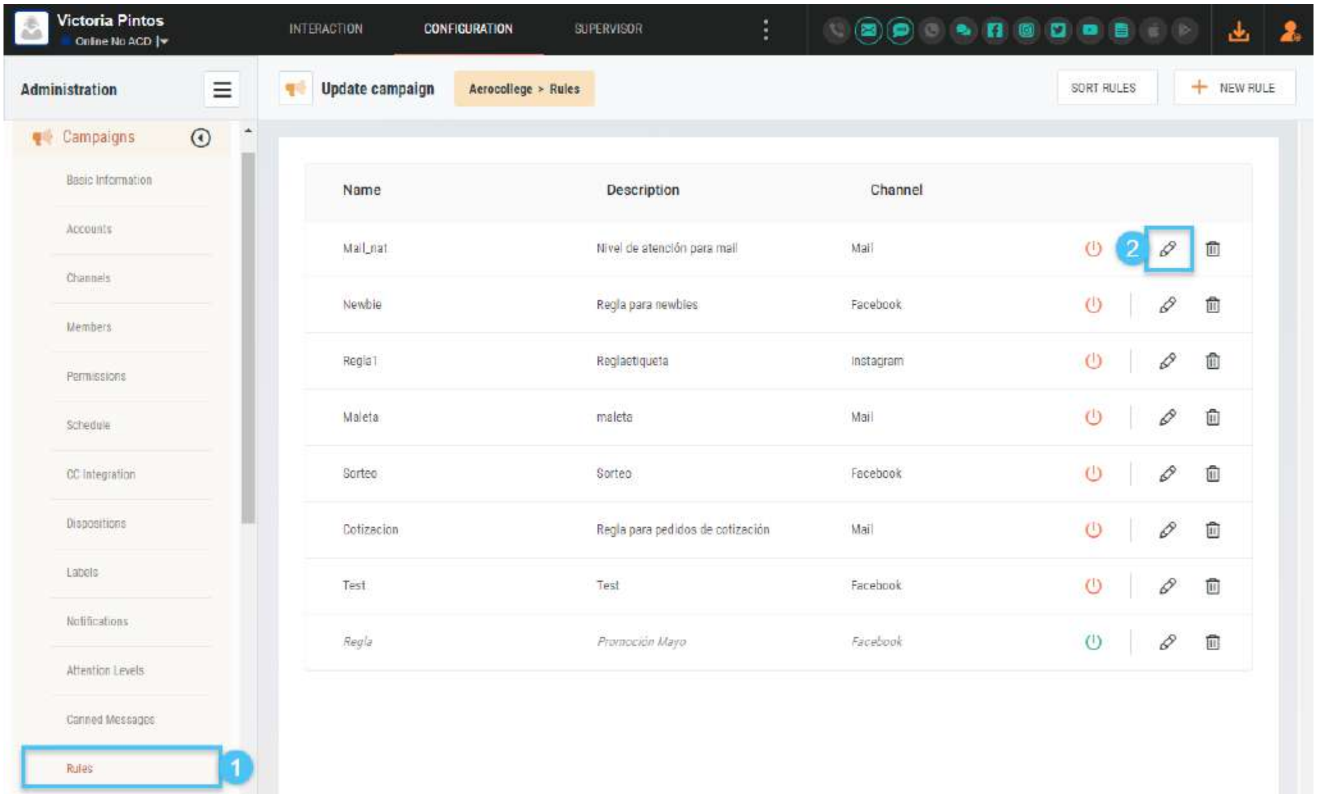
1. Go to the "Configuration" tab:



2. Click on the "Campaigns" section and then click the "Edit" button for the campaign for which the rule will be edited :



3. Click on the campaign's "Rules" section and then click the "Edit" button for the rule :



For information on a rule's fields, see "How to define a new rule".

The name of the rule is the only field that cannot be edited.

4. After editing, click the "UPDATE" button to save the changes to the rule.
5. To cancel the operation without saving the modifications, click the "CLOSE" button.

Related Articles

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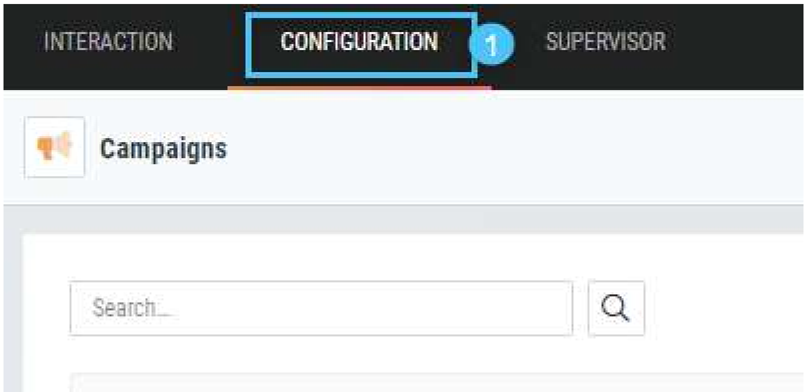
How to delete a rule

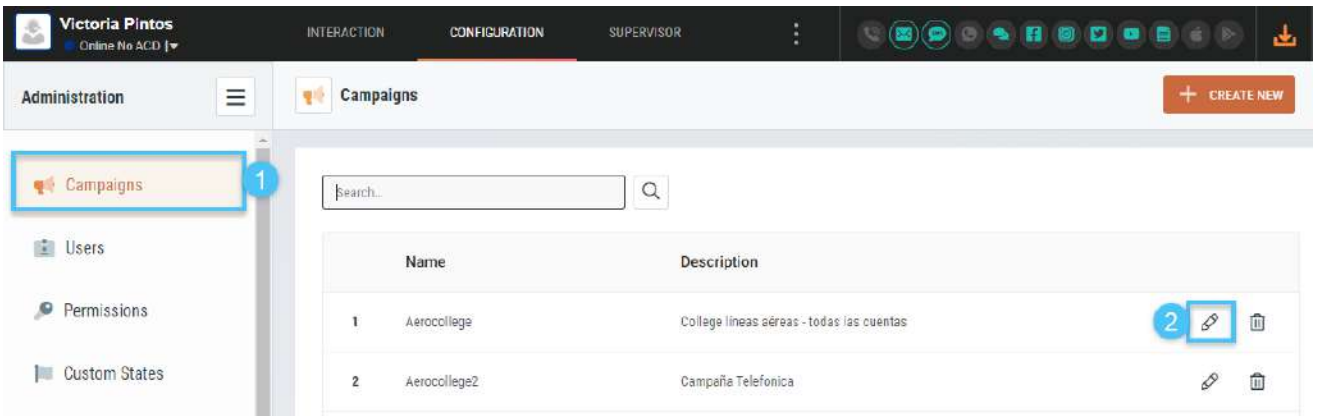
Should you want to delete a rule, you can do so, bearing in mind that the actions defined in it will no longer be applied to any interactions that meet its conditions. Deleting a rule cannot be undone.

To delete a rule:

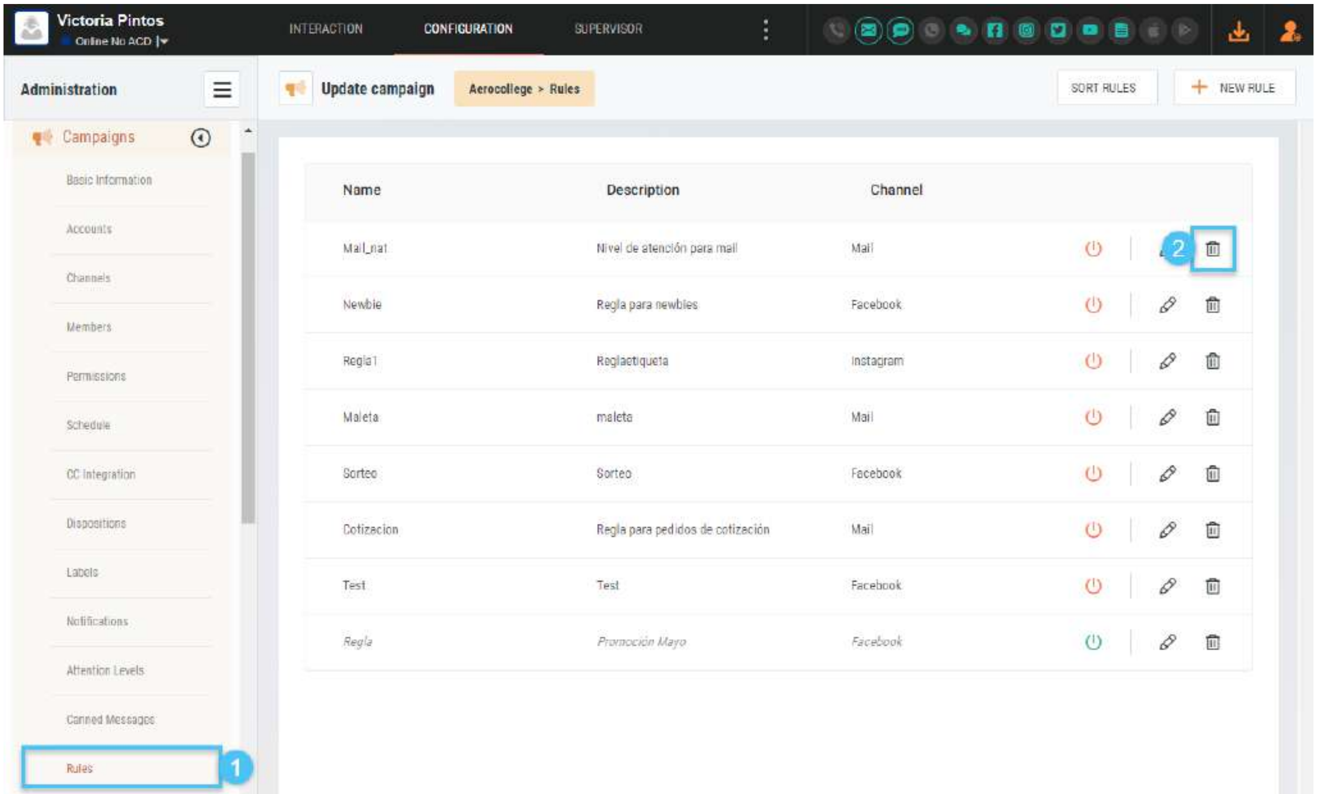
1. Go to the "Configuration" tab:



2. Click on the "Campaigns" section  and then click the "Edit" button for the campaign for which the rule will be deleted  :

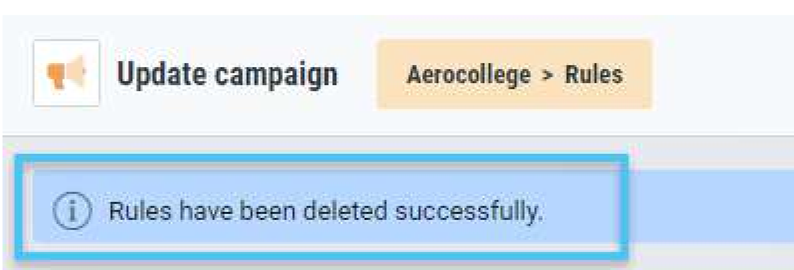


3. Click on the campaign's "Rules" section  and then click the "Delete" button for the rule  :



4. Click the "Yes" button to confirm deletion of the rule:

5. A message confirming successful deletion of the rule is displayed:



Related Articles

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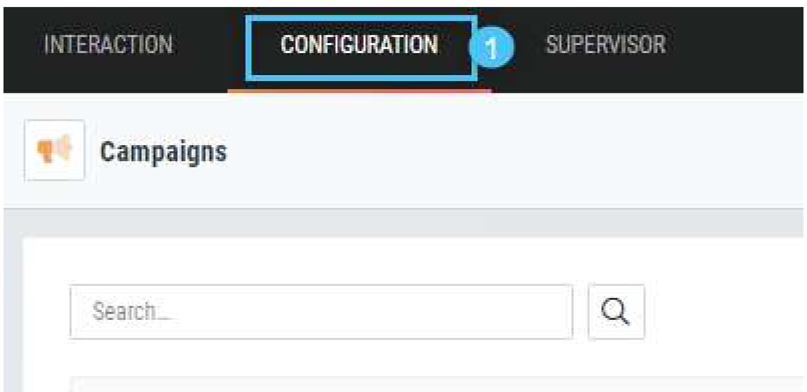
How to change the priority of a rule

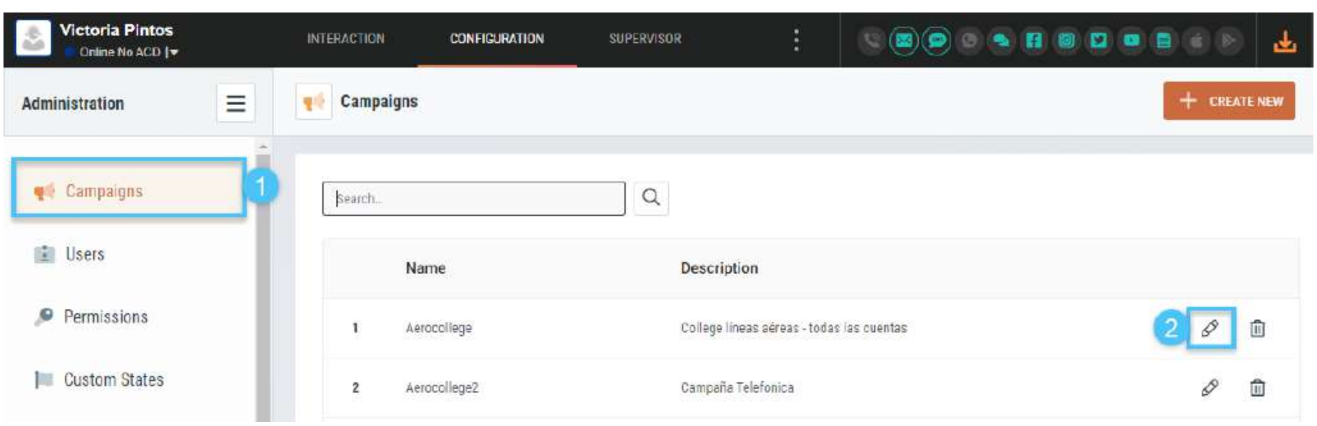
When defining a new rule, by default it will be the one with the lowest priority in relation to those already created, i.e., it will be the last rule to be applied. However, if you want a particular rule to be applied before another one, you can give it higher priority over the others in just a few steps.

To change the priority of a rule:

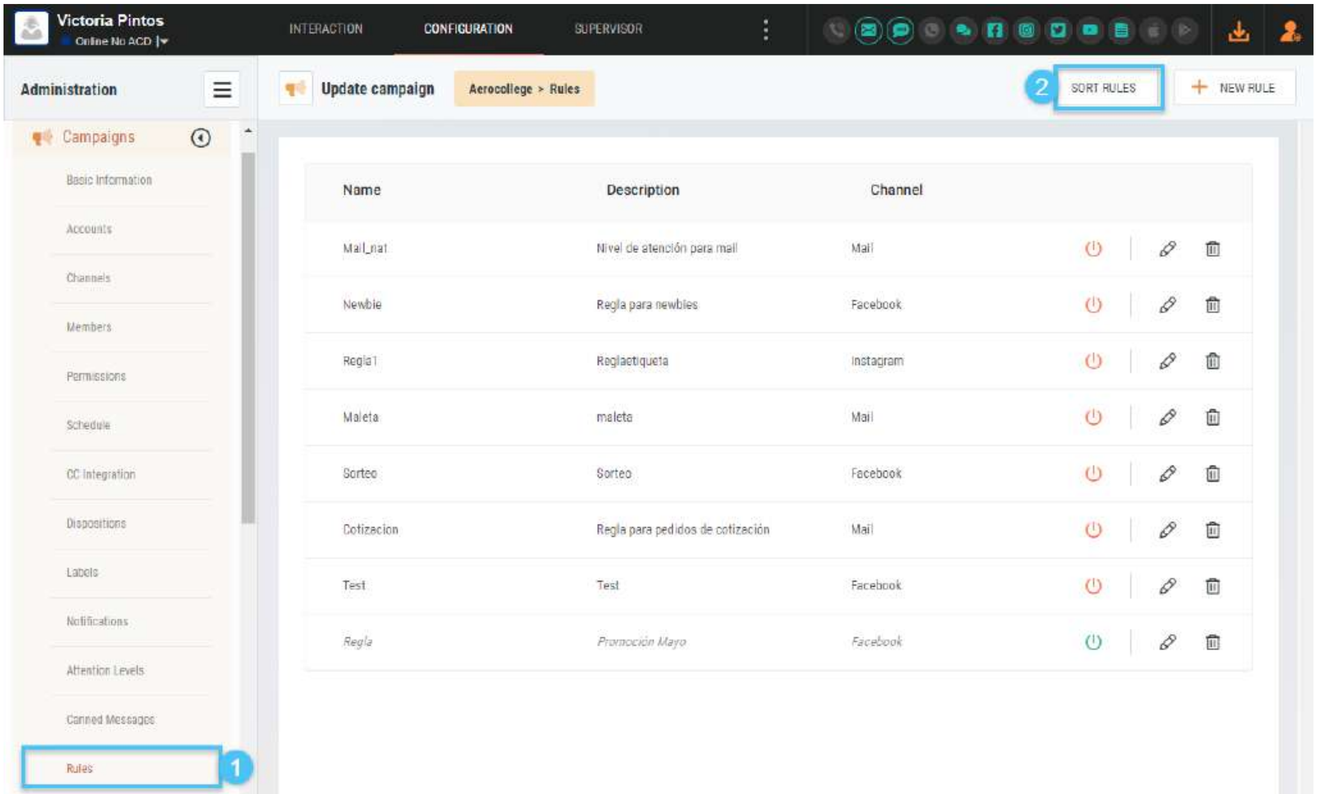
1. Go to the "Configuration" tab:



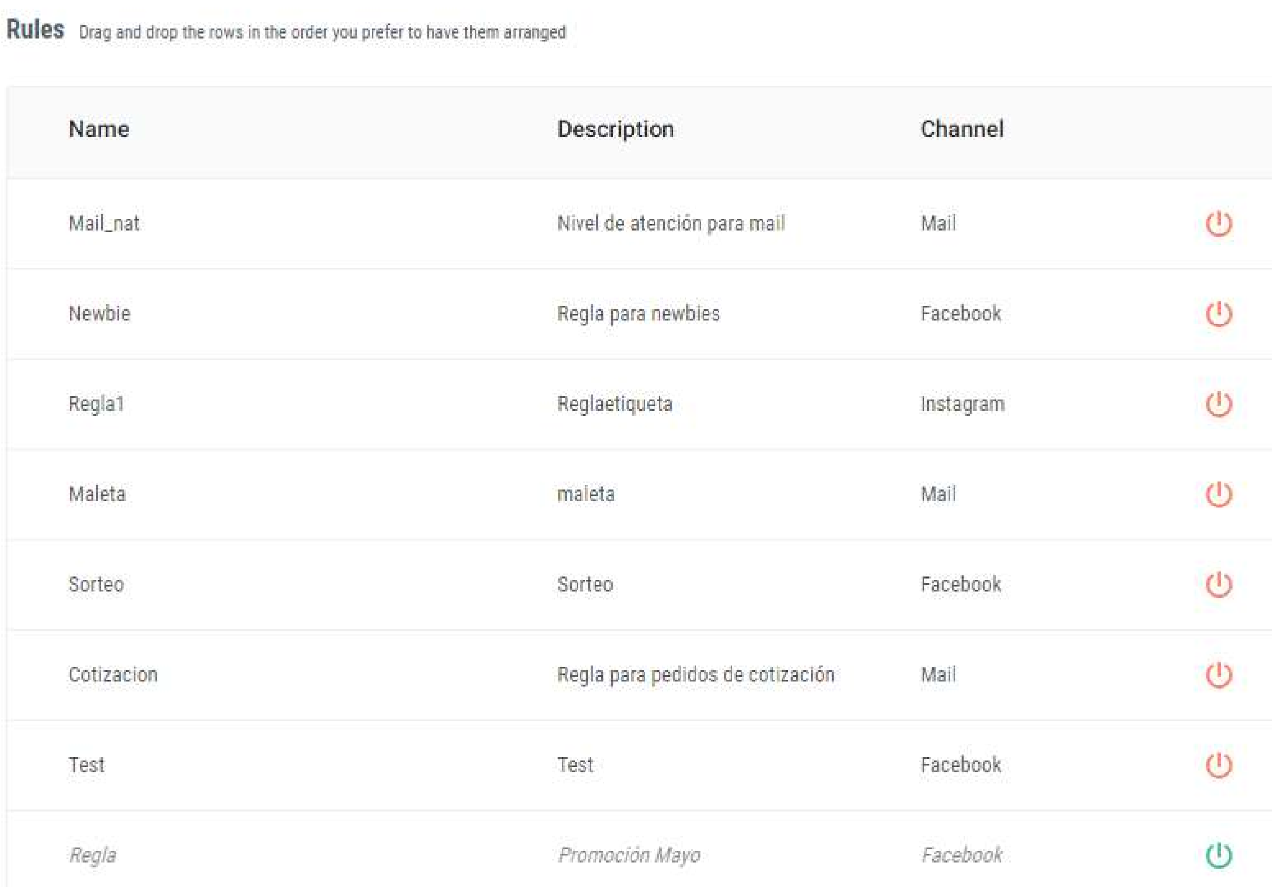
2. Click on the "Campaigns" section 1 and then click the "Edit" button for the campaign for which the rule’s priority is to be changed 2 :



3. Click on the "Rules" section of the campaign 1 and then click the "SORT RULES" button 2 :



4. Highlight the rule and then drag and drop it into the desired position:



Name	Description	Channel
Mail_nat	Nivel de atención para mail	Mail
Newbie	Regla para newbies	Facebook
Regla1	Reglaetiqueta	Instagram
Maleta	maleta	Mail
Sorteo	Sorteo	Facebook
Cotizacion	Regla para pedidos de cotización	Mail
Test	Test	Facebook
Regla	Promoción Mayo	Facebook

5. After adjusting rule priorities, click the "SAVE" button to save the changes.
6. To cancel the operation without saving any settings, click the "CANCEL" button.

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Accounts/Channels

- What are channels?
- What is an Account?
- How to create an SMS account
- How to create a Contact Form account
- Webchat Configuration
- WhatsApp channel configuration
- Email Configuration
- Configuration of Social Networks
- App Store Configuration
- Manage accounts
- How to create Call acounts

What are channels?

Channels are the media by which the contact communicates with the company or the company with the contact.

From OCC, each campaign can serve multiple accounts, from multiple channels and the interactions that come from each of them will be managed by the agents in a unified way.

Each channel will be enabled for a campaign when the first account of its type is created. That is, if a campaign will attend to the interactions coming from a certain Facebook fanpage, on adding and associating that account to the campaign, the Facebook channel is automatically enabled. as a means of contact management for that campaign.

The available channels in OCC are:

Mail

Several existing mail accounts can be associated with the campaign, set to receive and send messages. Agents will be able to view the complete email threads associated with an interaction and apply fully configurable canned message replies and signatures to standardize communications.

Facebook

Multiple Facebook accounts and *fanpages* can be associated with the same campaign. *OCC* receives all the comments to the posts, comments on the wall, replies and private messages made by the contacts on those pages, and they are distributed to the agents like any other interaction coming from any other channel type.

Instagram

Multiple Instagram accounts can be associated with the same campaign. OCC will allow you to manage all the interactions associated with your own post, direct mentions and mentions about comments.

YouTube

Multiple YouTube accounts can be associated with the same campaign. OCC will allow you to manage all the interactions associated with published videos and live videos.

Google Play Store

Multiple applications from the Google Play Store can be associated with the same campaign. OCC will allow you to manage all the interactions associated with the reviews of the associated applications.

App Store

Multiple App Store applications can be associated with the same campaign. OCC will allow you to manage all the interactions associated with the reviews of the associated applications

- Twitter

  Several Twitter accounts can be associated with the same campaign. All the mentions, retweets and direct messages made by these contacts to these accounts will be distributed to the agents for management.

- Web Form

  OCC allows you to manage contacts that complete a Web form which can be on the company website, a landing page or a service desk application, for example. This contact, together with all the information entered in the form, will be distributed to the campaign agents so that it can be managed

- Telephone

  Inbound as well as outbound call campaigns can be handled though OCC and be taken unifiedly with interactions generated through digital channels.

- Whatsapp

  OCC allows you to associate several WhatsApp accounts with the same campaign. Associating an account will allow OCC to manage both incoming and outgoing messages for that account, as well as allowing messages to be sent in bulk to a defined batch of contacts.

- SMS

  Associating an SMS account will allow the client to contact the contact center through text messages and for agents to respond or initiate a conversation through the same channel.
  Additionally, it is possible to configure the bulk sending of SMS through a campaign without the need for agents to participate in the sending process.

Once you have a defined account for a specific channel type, the channel will appear in *Configuration/Campaign/Channels* and you will be able to edit the general characteristics related to it as required.

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What is an Account?

Each of your campaigns, depending on the channels you make available, they will have several accounts associated with them.

For example, if your campaign must manage the emails that reach support@your-company.com, that account must be configured in OCC, specifying I/O server, user, password, etc., so that the emails can be downloaded from the tool and agents can send emails from that account.

The same happens with Facebook, Twitter, YouTube, and Instagram accounts.

Regarding to webchat and web forms, they will not be external accounts that are associated but they will be accounts that you set up right there by associating a chat or a specific form.

Regarding the applications of Google Play Store and App Store, they will not be associated accounts but specific applications published on these platforms.

The configuration of the telephony accounts specifies whether inbound calls or outbound calls will be managed and all the necessary parameters for their correct processing.

Related Articles

Content by label

There is no content with the specified labels

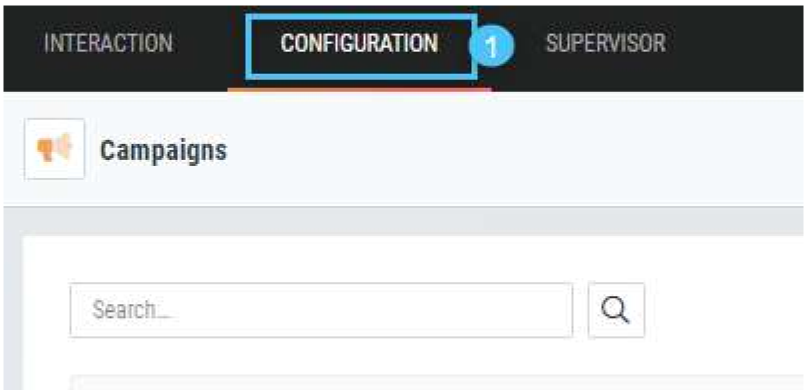
How to create an SMS account

An SMS account will allow the client to contact the contact center through text messages and for agents to respond or initiate a conversation through the same channel.

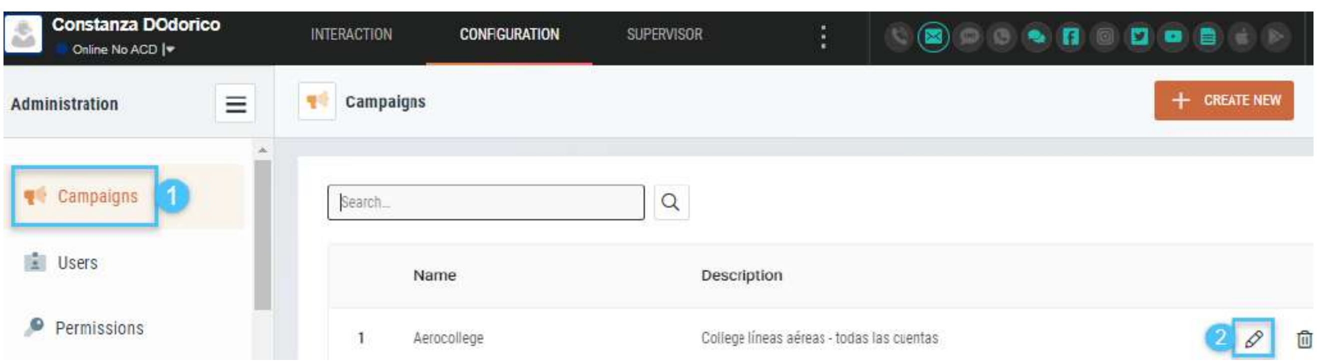
Additionally, it is possible to configure the bulk sending of SMS through a campaign without the need for agents to participate in the sending process.

To create an SMS account in a campaign:

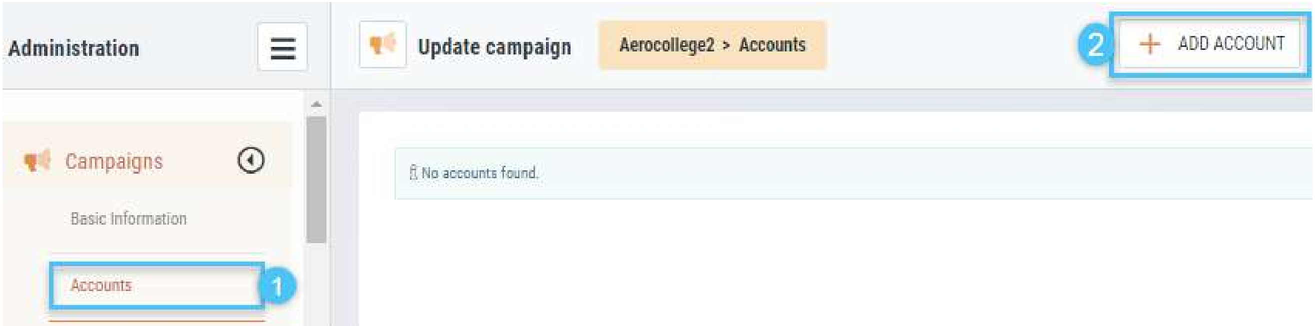
1. Go to the "Configuration" tab.
:



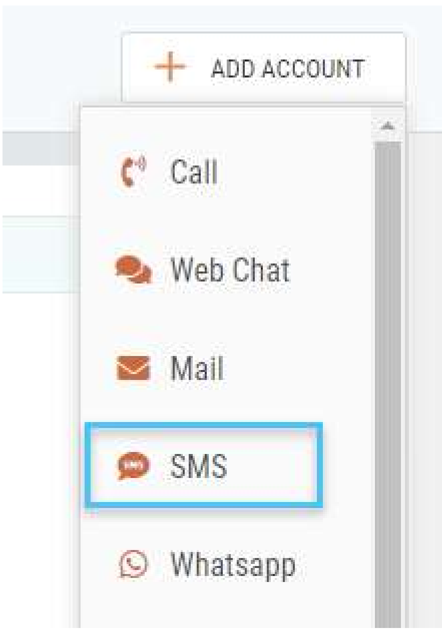
2. Click on the section "Campaigns" and then click the "Edit" button of the campaign where the account will be created :



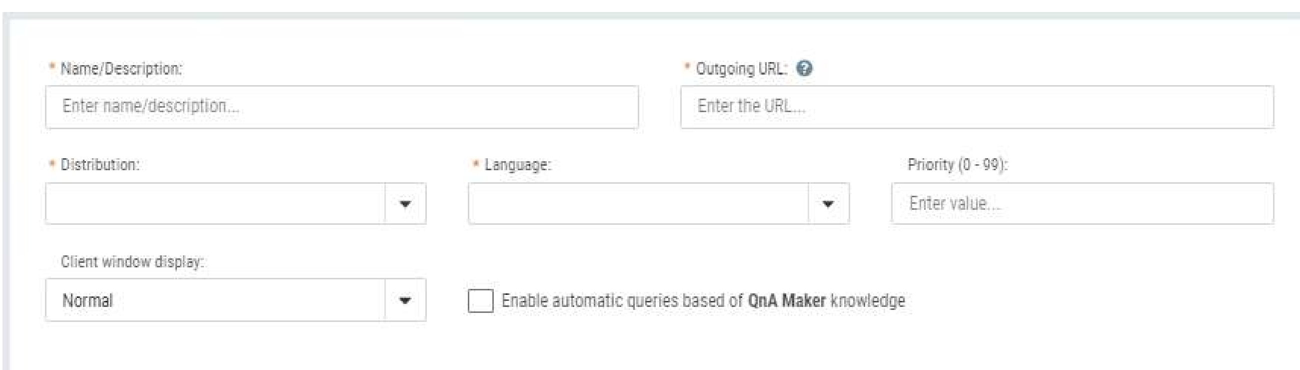
1. Click on the "Accounts" section of the campaign and then click the button "Add Account" :



2. Select the account type "SMS":



3. Enter the required data:



Name/Description: name that will identify the account in the system.

Distribution: criteria by which the chats that come from this account will be distributed to the operators.

Click here to expand...

Circular: assigns interactions to the operator who has been in the Available state for the longest time.

Queued: send new interactions to the campaign queue; to be taken or assigned manually.

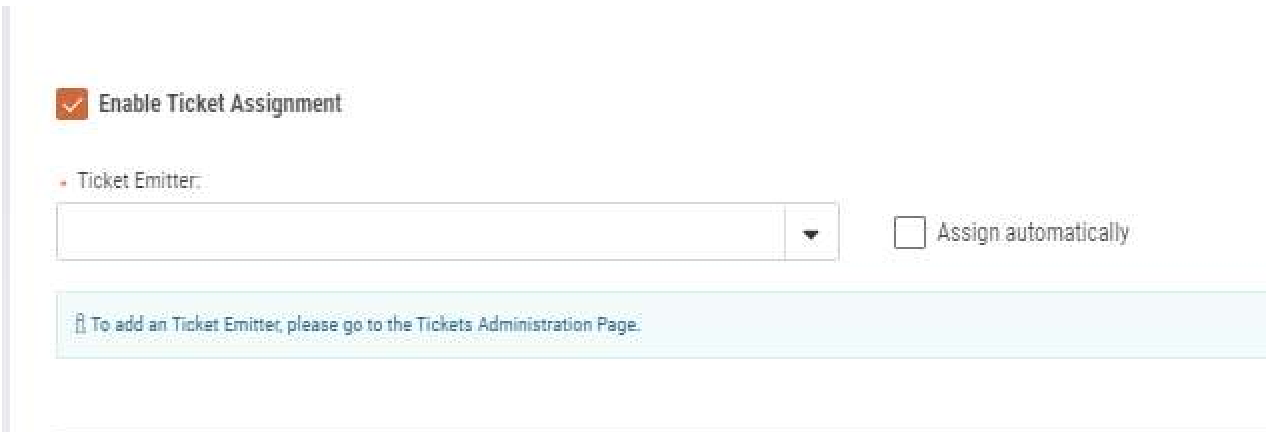
Skill: the interactions will be assigned to the operators who have the highest ratings in terms of the skills required for each campaign; the "Circular" algorithm is applied to select between operators who receive the same skill score. If you select this, you must indicate the agent skills that you want to consider in the distribution

Priority: defines the priority of the chats of this account with respect to the communications that come from others; the higher the number that is entered, the higher the priority. *Optional.*

Language: language that the operator's spell checker will use when typing in the chat window.

Outgoing URL: Server URL that will be used to manage the sending/receiving of SMS messages. This is necessary since it is the server which receives the SMS messages from the public telephony network and also receives them from OCC and sends them to the network. Communication is not handled in a P2P manner with the client, but through this server.

4. **Attention Level:** You will be able to select from among the *Attention Levels* previously created, the one most appropriate for the operation of this account
5. **Ticket manager:** You can enable *Tickets Management* to manually or automatically assign tickets to the interactions associated with this account, and you can also select a previously configured ticket issuer.

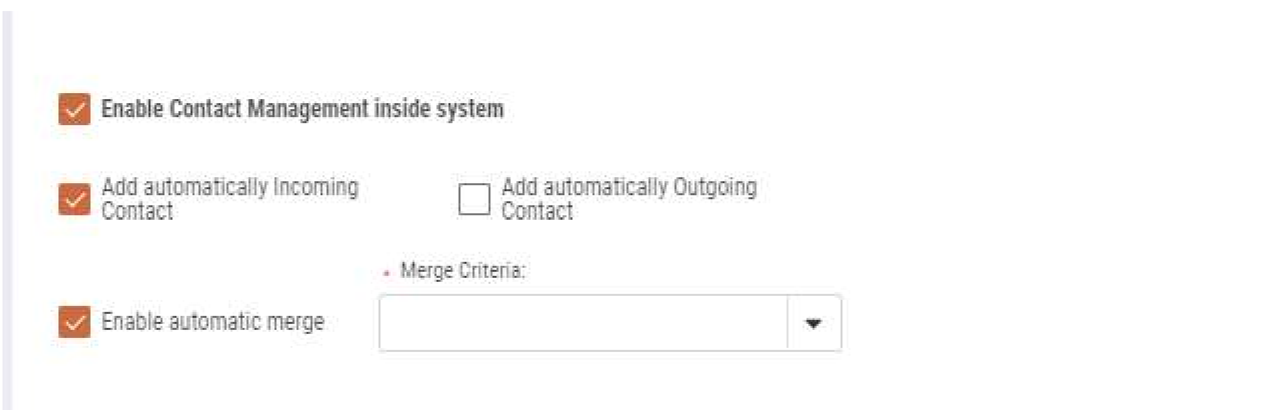


Assign tickets: if you check this box, you will be enabling the option to assign tickets to the interactions belonging to this account.

Automatic: if this box is checked, the tickets will be assigned automatically.

*** Ticket issuer:**
Click here to expand...
You will need to select a previously configured ticket issuer, see How to create a ticket issuer.

6. **Contact management:**

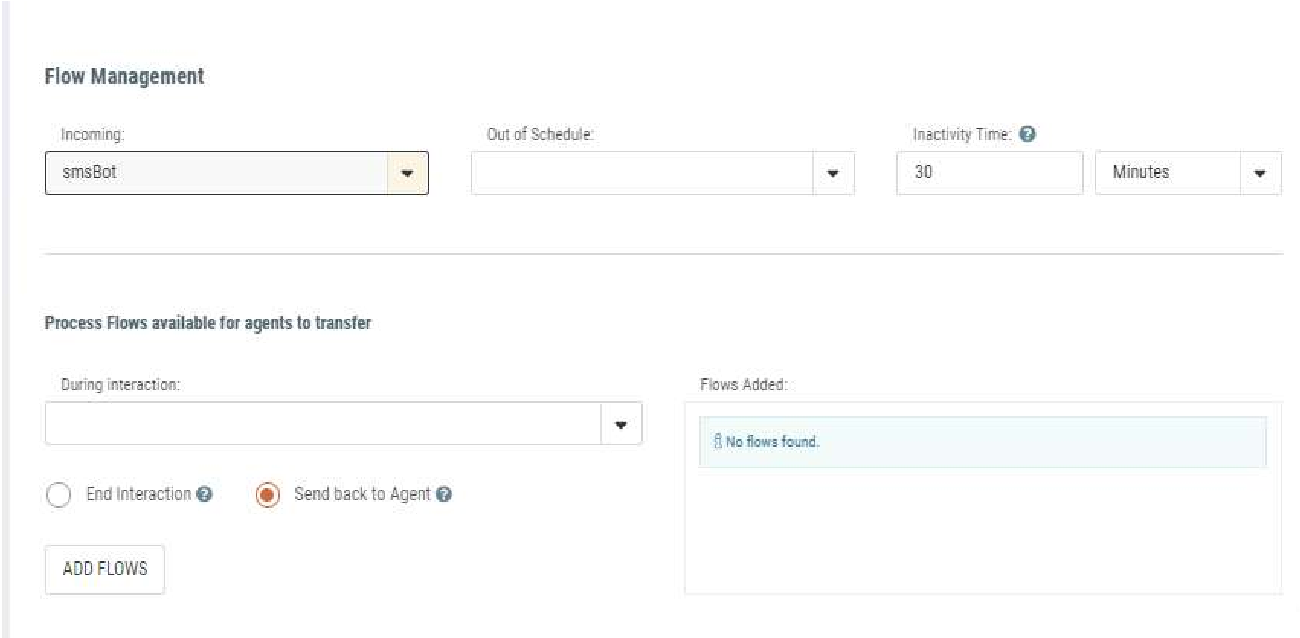


Contact management: if you check this box, you will be enabling the option to create a new contact with each interaction.

Auto Add Contact: if you check this box, the system will automatically create a new contact for each interaction. *If it is not checked, contacts will be created manually.*

Automatic unification: after checking this box, you must define the criteria for saving the contact data. You can either keep the contact data already stored, or update the data in each new interaction.

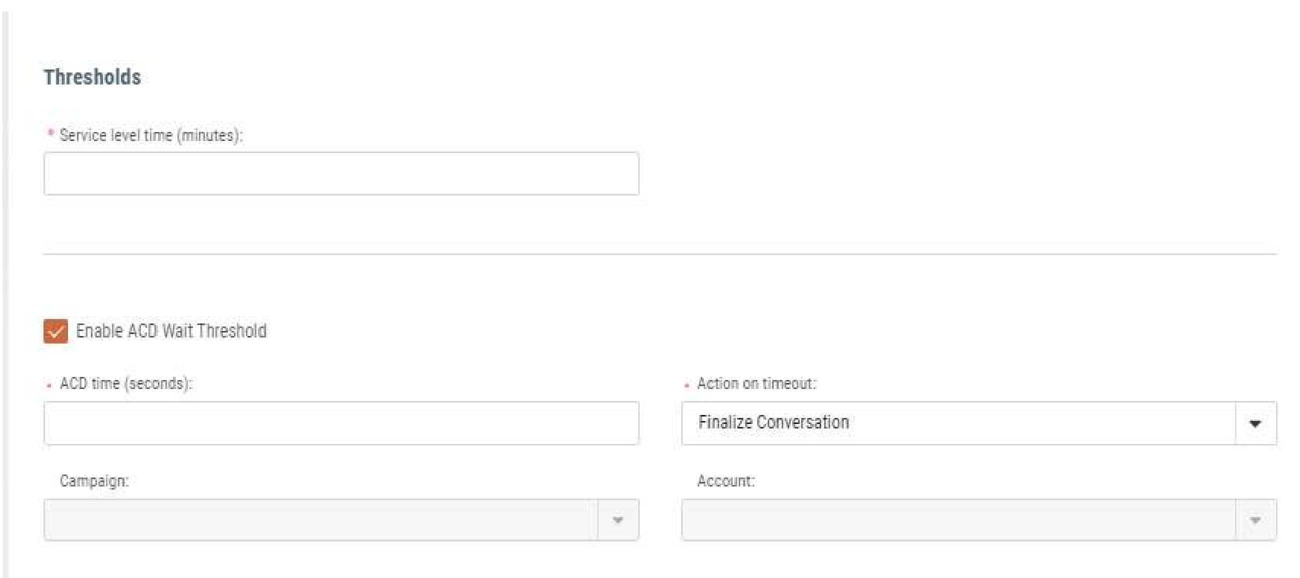
7. **Flow management**:



Allows you to assign an SMS automatic process to the account to automatically reply to messages from a flow.

8. **Thresholds**:

This information is not specific to the account but will be common to all accounts in the channel. Editing from here will only be possible if the account being defined is the first of its type, otherwise they will be read-only fields. To edit the channel thresholds, read: "How to edit a Channel's general setup".

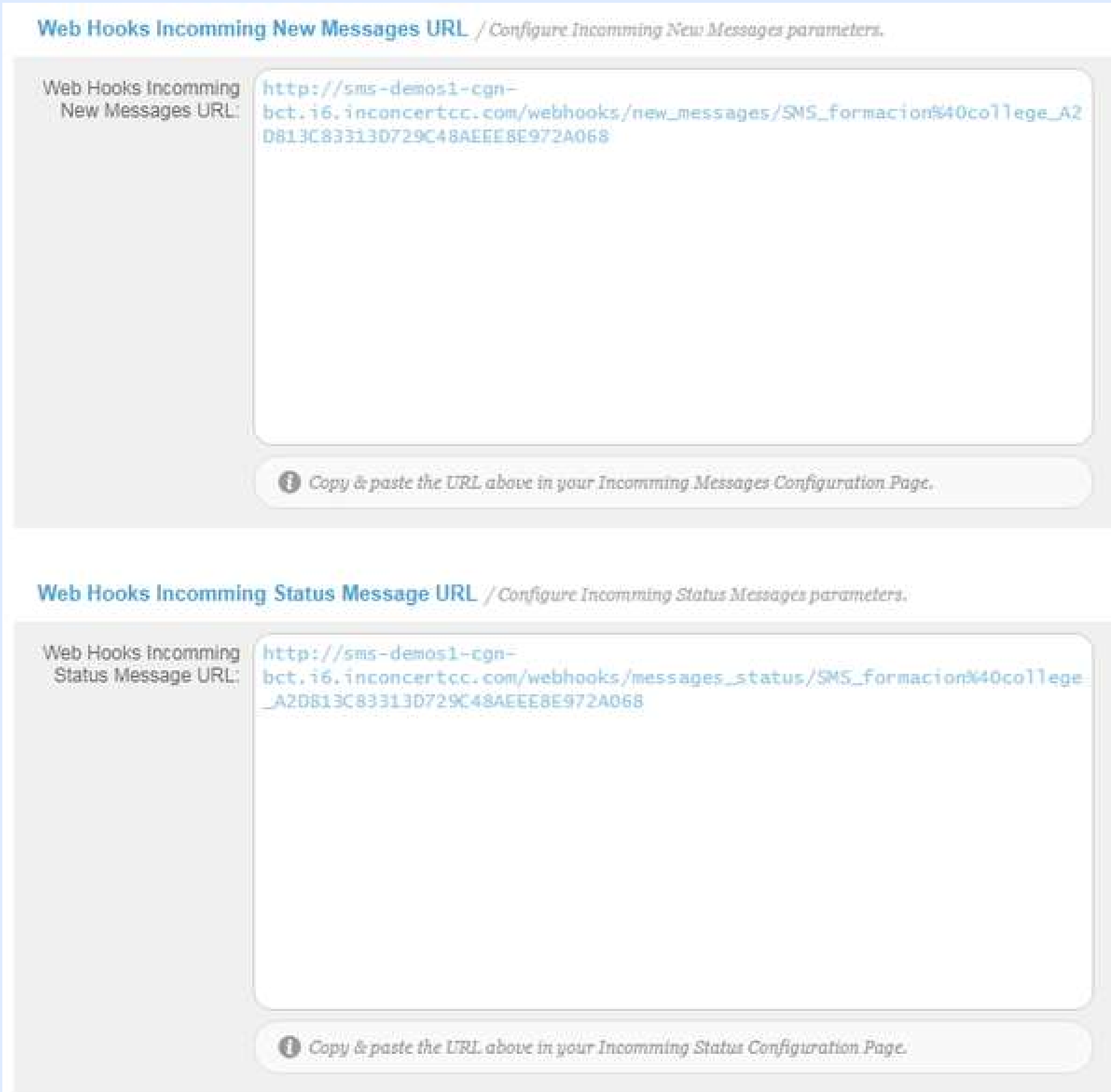


ACD wait threshold: specifies the maximum time that the conversation is expected to spend in the distribution queue.

Service Level: maximum answer time for the communication to be considered to have been attended within the desired service level.

9. After completing all the required fields, click the "SAVE ACCOUNT" button to continue.
10. To cancel the operation without saving the data entered, click the "CANCEL ACCOUNT" button.

Web Hooks - Account URLs
By providing a URL (Outgoing URL), the system will make available two URLs for different purposes:



These refer to:

- **Web Hooks Incoming - New Messages URL:** Details the URL to which the system will be listening and receiving the new SMS messages.
- **Web Hooks Incoming - Status Message URL:** Details the URL that the external SMS server should use to notify i6 of the delivery status of messages.

Related Articles

- How to set up Messenger messaging
- How to associate a YouTube account
- How to associate an application from Google Play Store
- How to associate an application from the App Store
- How to create a Call account

How to create a Contact Form account

Businesses often require that a contact form be available on the company's website, a support site or a landing page and it is desirable that the contacts that enter through this route can be distributed to the operators and managed in the same way as those that enter through any other communication channel.

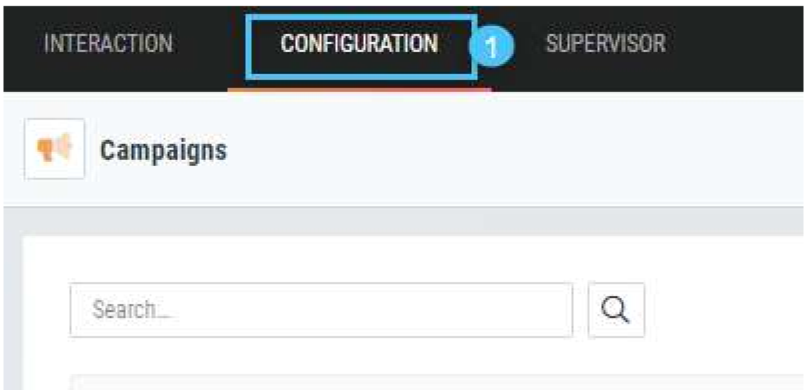
From the Web Designer tool included with i6, it is possible to create any type of form that can then be embedded within a web page.

In order to enable the use of a contact form as a "channel" in a campaign, it is necessary to create an account of this type.

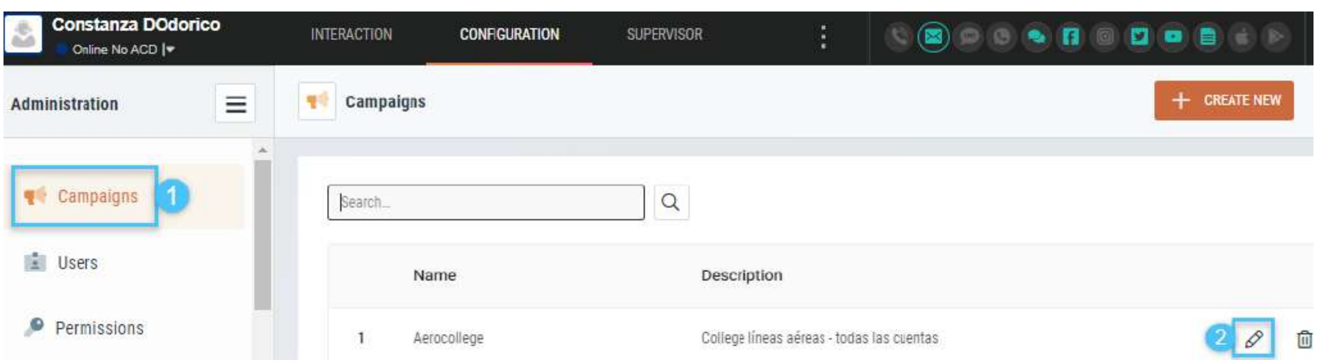
> Several contact form accounts can be associated with the same campaign, depending exclusively on the operation of the Contact Center.

To create a Contact Form account in a campaign:

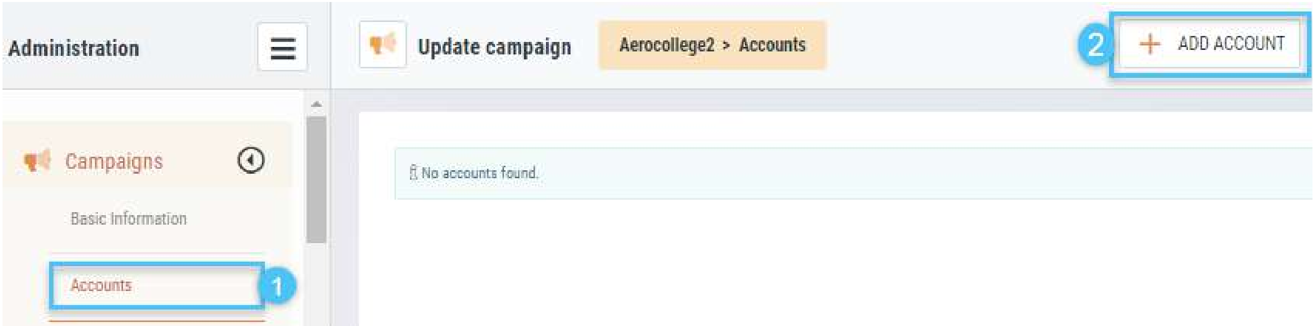
1. Go to the "Configuration" tab:



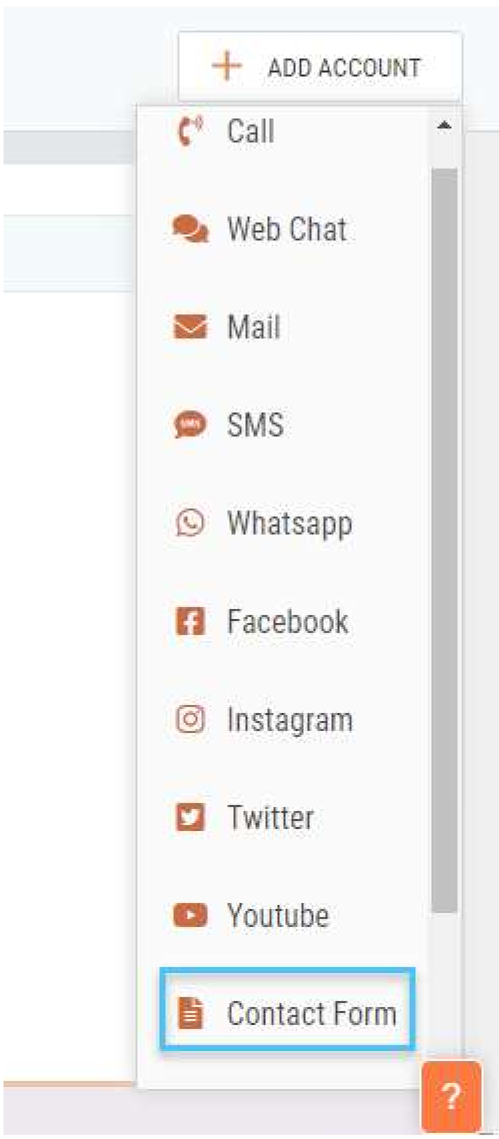
2. Click on the "Campaigns" section 1 and press the "Edit" button of the campaign to which you will associate the account 2 :



3. Click the campaign's "Accounts" section 1 and then click the button "NEW ACCOUNT" 2 :



4. Select the account type "Contact form":



5. Enter the required data:

Name/Description: name that will identify the account in the system.

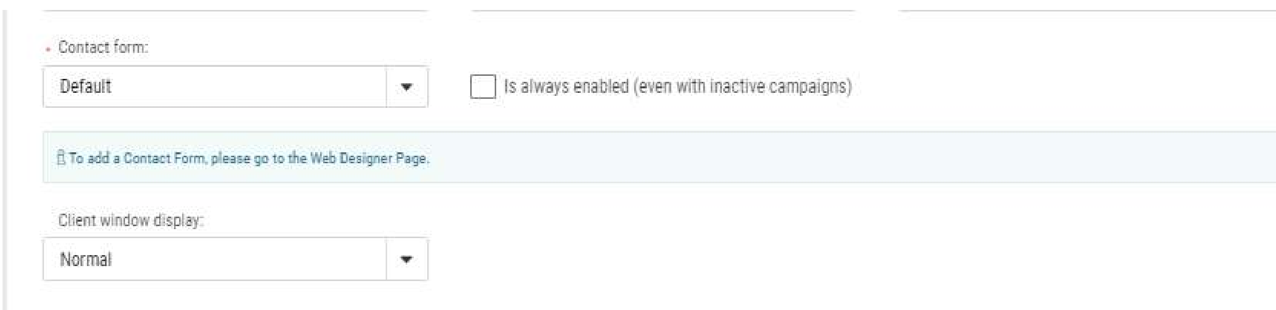
Distribution: criteria by which the forms that come from this account will be distributed to the operators.

The possibilities are:

Circular: assigns interactions to the operator who has been in the Available state for the longest time.

a. **Queued:** send new interactions to the campaign queue; to be taken or assigned manually.
b. **Skill:** the interactions will be assigned to the operators who have the highest ratings in terms of the skills required for each campaign; the "Circular" algorithm is applied to select between operators who receive the same skill score. If you select this, you must indicate the agent skills that you want to consider in the distribution
c. **Priority:** defines the priority of the forms of this account with respect to the communications that come from others; the higher the number that is entered, the higher the priority.

6. **Front End Setup:**

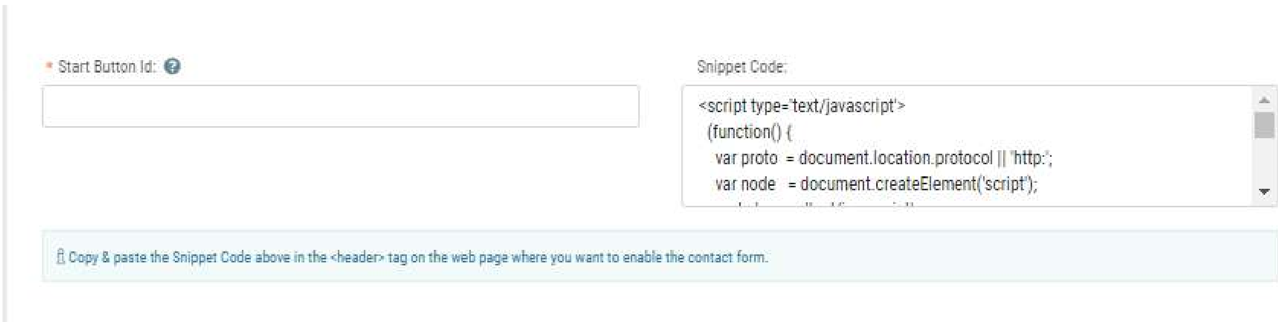


Contact form: here you can select the front-end of the form that you want to use for this account. This is the interface that will be displayed embedded in the website or that will open when clicking a certain button or link on a page.

You can leave the form that comes as default or, from the drop-down list, you can select a front-end previously designed from WebDesigner.

Language: operators have a spell checker that is enabled when they are responding to an interaction. If the system cannot automatically identify the language of the interaction, it takes the one which has been set in this field.

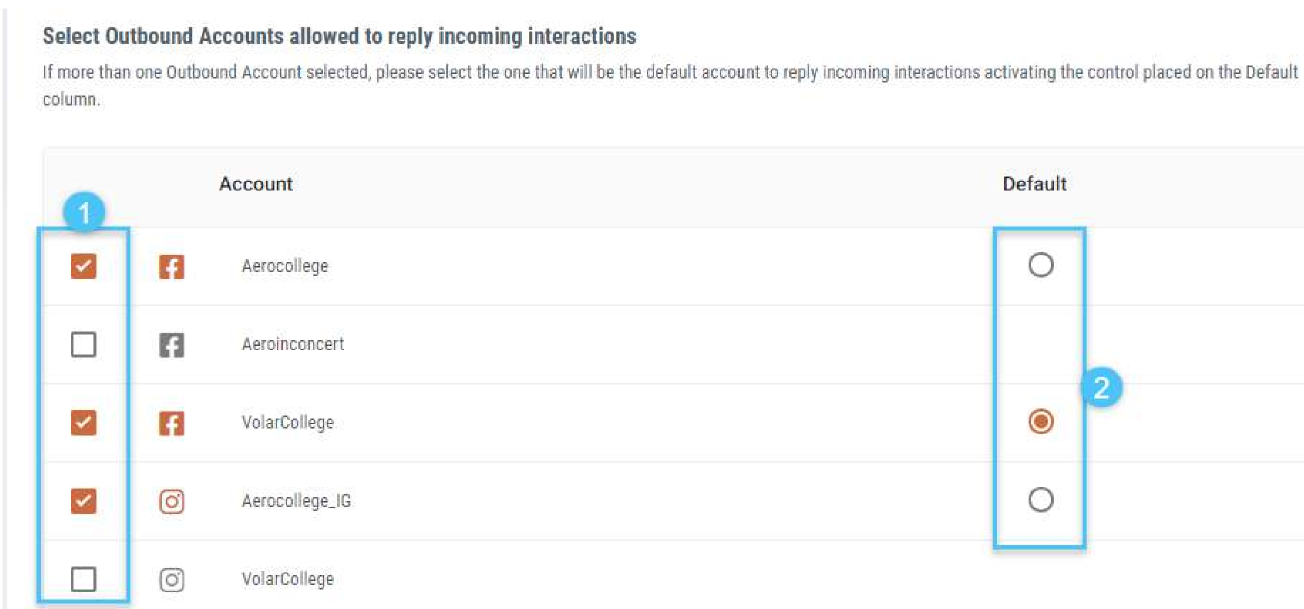
7. **Snippet Code:**



Start Button Id: ID of the button that will allow the user to access the form through tthe web site.

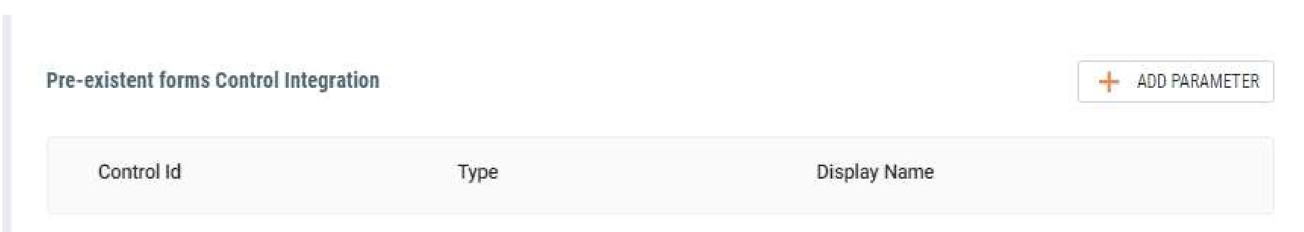
Snippet Code: Javascript code generated automatically by the system which has to be inserted in the webpage where the contact form must be enabled.

8. **Outbound accounts:**



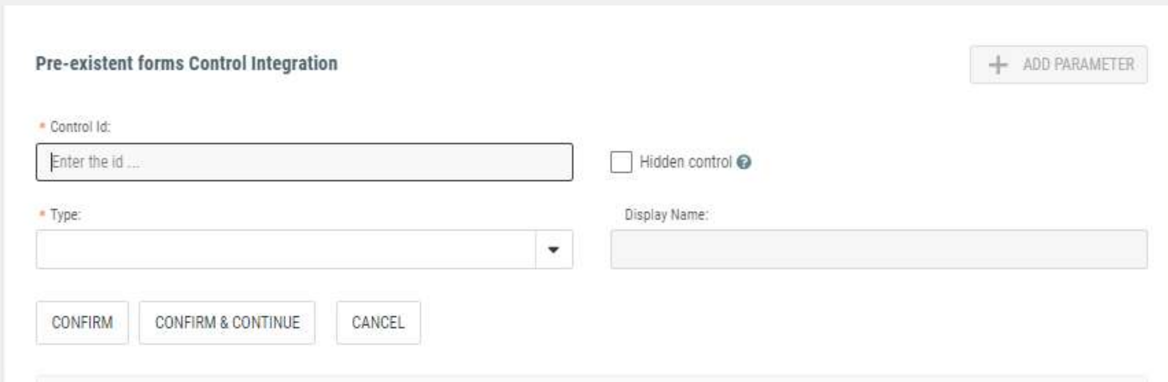
You must select the campaign's outbound accounts through where you will be able to reply to the contact form account interactions , indicating at the same time which will be the default account to reply .

9. **Preexisting Integration Controls:**



These are widely used if your clients must previously log into the web to fill out a form; in this way you will be able to obtain certain required parameters and thus not request them again while attending to the client. For this, you configure them with their corresponding type, and, when generating the interaction, the system recognizes that the ID "name", for example, is as a field and it is sent.

By clicking the "NEW PARAMETER" button, you will be able to define if you want to capture values that refer to controls that exist where you have the Contact Form service enabled:

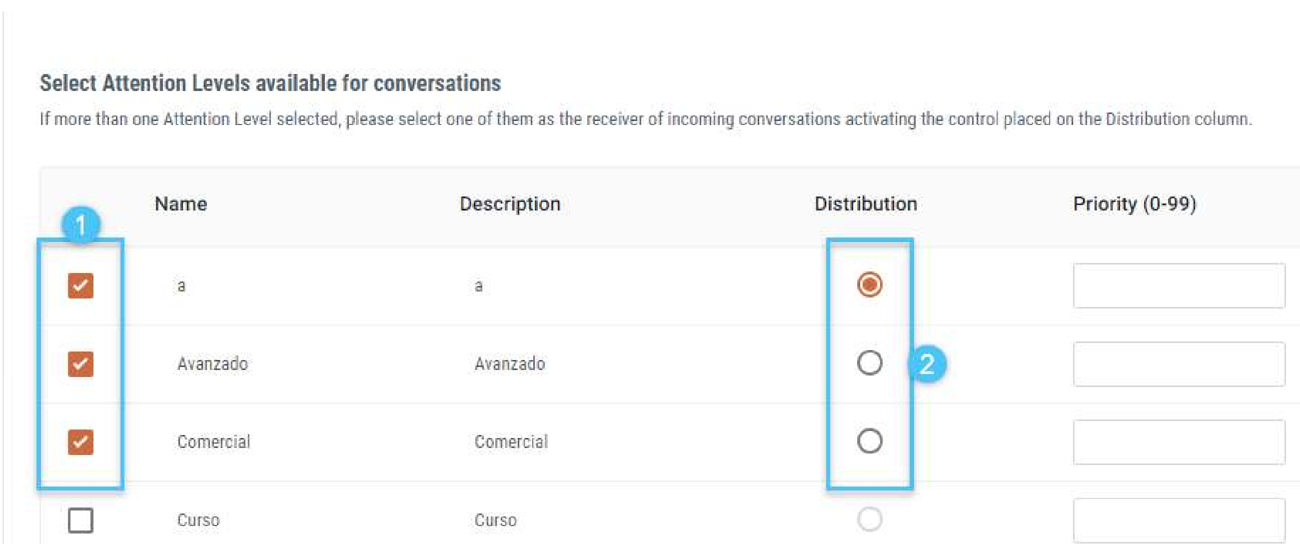


Control ID: unique identifier of the field on the web where you have enabled the Contact Form service.

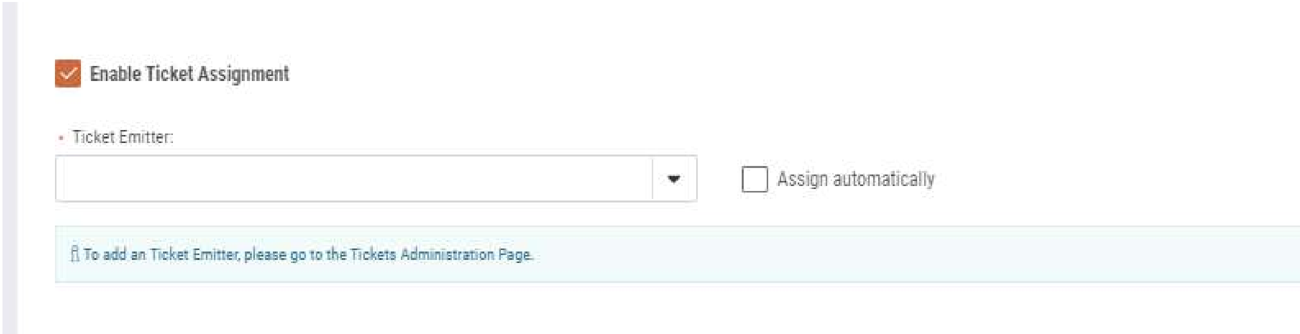
Type: refers to the type of field associated with the Control ID entered. *The options are: ID, Name, Phone number, Email and Custom.*

Click the "CREATE" button to save the control defined or "CREATE & CONTINUE" to save and continue creating controls. If you want to discard the changes, click the "CANCEL" button.

10. **Attention Levels:** You will be able to select from among the *Attention Levels* previously created, the one most appropriate for the operation of this account.



11. **Ticket manager:** You can enable *Tickets Management* to manually or automatically assign tickets to the interactions associated with this account, and you can also select a previously configured ticket issuer.



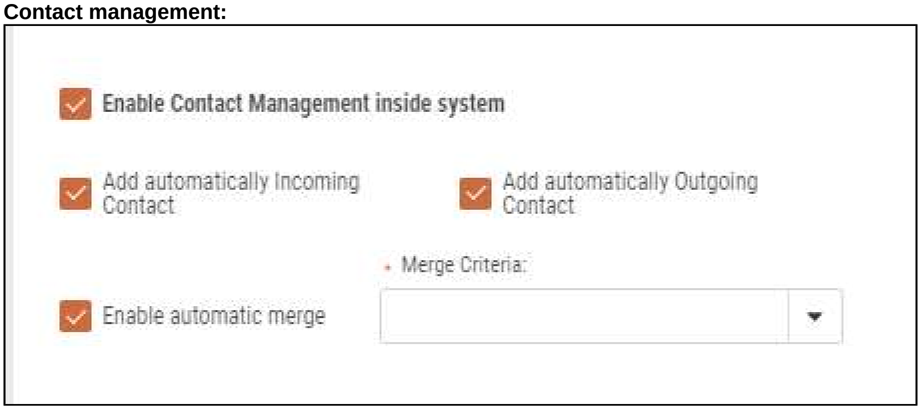
Assign tickets: if you check this box, you will be enabling the option to assign tickets to the interactions belonging to this account.

Automatic: if this box is checked, the tickets will be assigned automatically.

*** Ticket issuer:**

You will need to select a previously configured ticket issuer, see How to create an issuer.

12. **Contact management:**



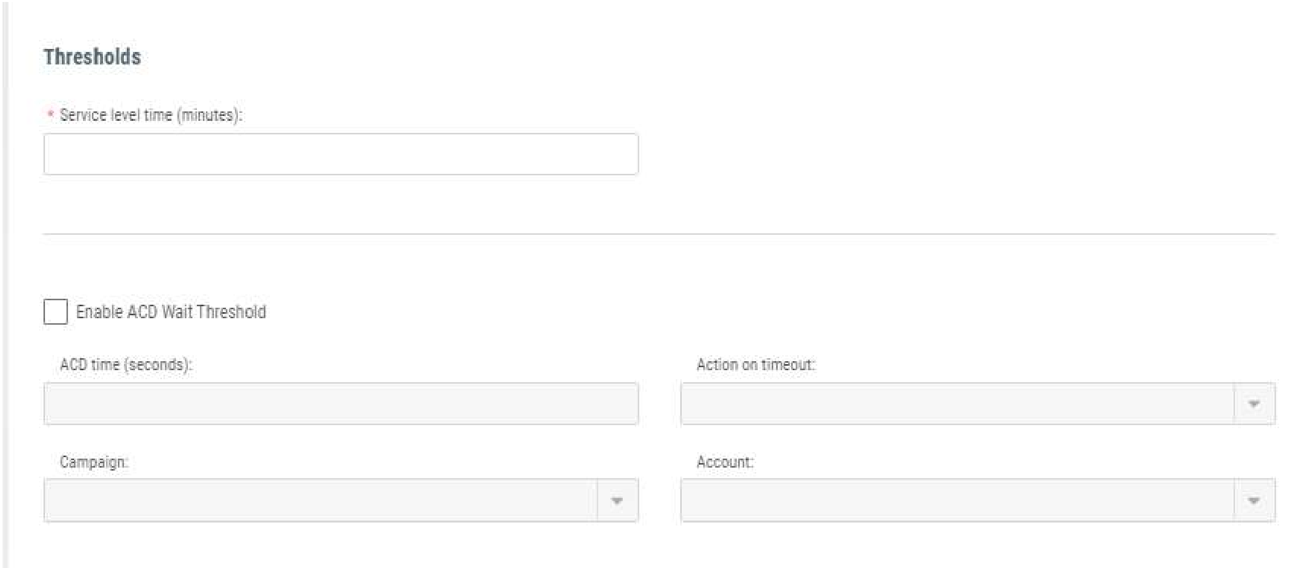
Contact management: if you check this box, you will be enabling the option to create a new contact with each interaction.

Auto Add Contact: if you check these boxes, the system will automatically create a new contact for each inbound and/or outbound interaction. *If it is not checked, contacts will be created manually.*

Automatic unification: after checking this box, you must define the criteria for saving the contact data. You can either keep the contact data already stored, or update the data in each new interaction.

13. **Thresholds:**

This information is not specific to the account but will be common to all accounts in the channel. Editing from here will only be possible if the account being defined is the first of its type, otherwise they will be read-only fields. To edit the channel thresholds, read on: "How to edit the general Channel settings".



Thresholds: the time **thresholds** are specified here for different operative and attention actions.

Service Level: maximum response time to consider a communication to be attenden within the desired Service Level.

14. After completing all the required fields, press the "SAVE ACCOUNT" button to continue.
15. To cancel the operation without saving the changes, press the "CANCEL ACCOUNT" button.

Related Articles

- Cómo asociar una cuenta de Correo
- Cómo crear una cuenta de Llamadas
- Cómo crear una cuenta de Formulario de contacto
- Cómo crear una cuenta de Llamadas (con Telefonia Nativa)
- Como crear una cuenta de Telefonia.

Webchat Configuration

- How to create a Web Chat account
- How to create a Web Chat account with Video Call
- How to define a welcome message in a Web Chat account
- How to define a waiting message in a Web Chat account
- How to define a finalization mail in a Web Chat account
- How to announce the agent assigned to a Web Chat interaction

How to create a Web Chat account

A *web chat* or *live chat* is a chat that is placed on a website and allows users to dialogue in real time with a contact center operator, who will answer their questions, support them in a purchase, etc.

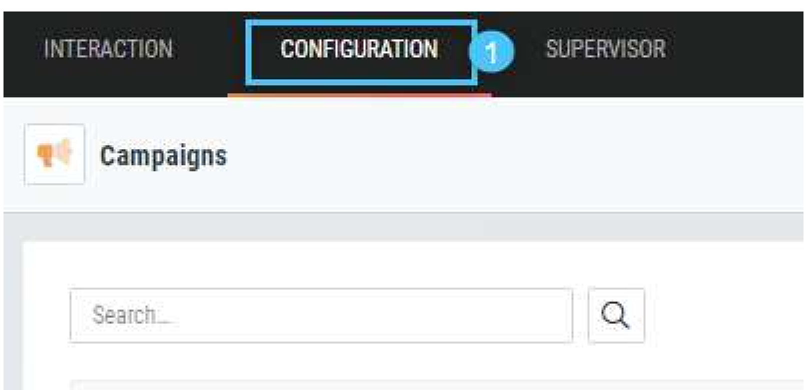
Sometimes, depending on business requirements, a chat may have a ***pre-chat*** and ***post-chat*** form associated with it. In general, pre-chat forms ask the user to enter two or three pieces of data in order to identify them in the system, in case they are a user who has already been contacted on another occasion, and also to give a little context to the operator who will attend them.

The post-chat, also called post-survey, on the other hand, is aimed at collecting information on the degree of client satisfaction with the service that was provided.

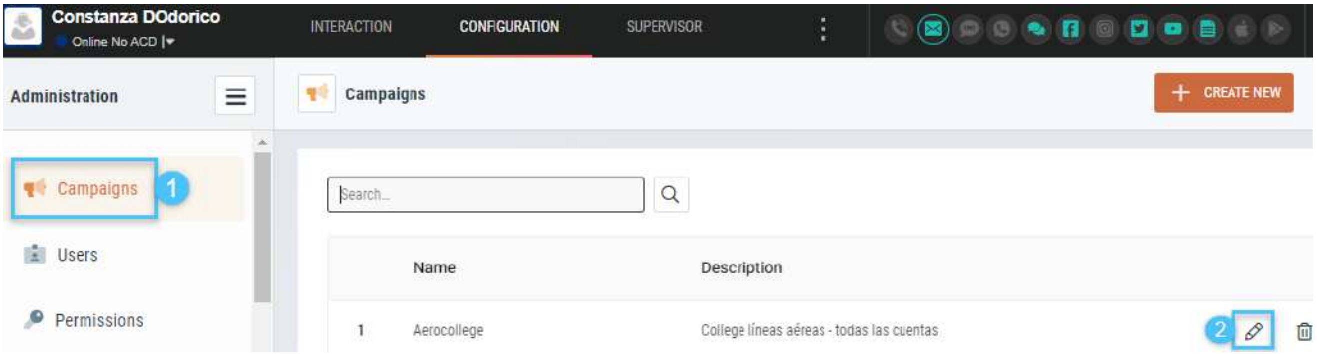
Both forms, like the chat interface, can be designed using the **WebDesigner** application.

To create a Web Chat account in a campaign:

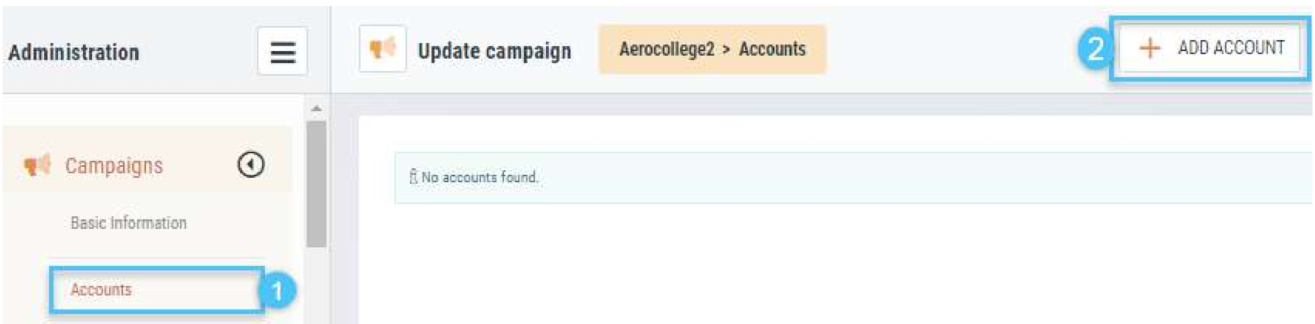
1. Go to the "Configuration" tab:



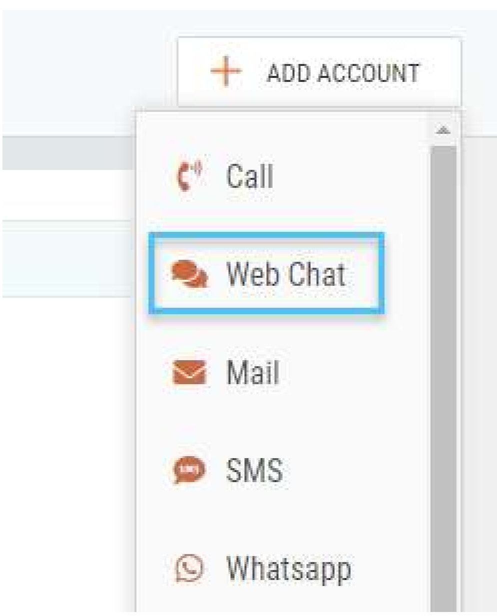
2. Click on the section "Campaigns" and then click the "Edit" button of the campaign where the account will be created :



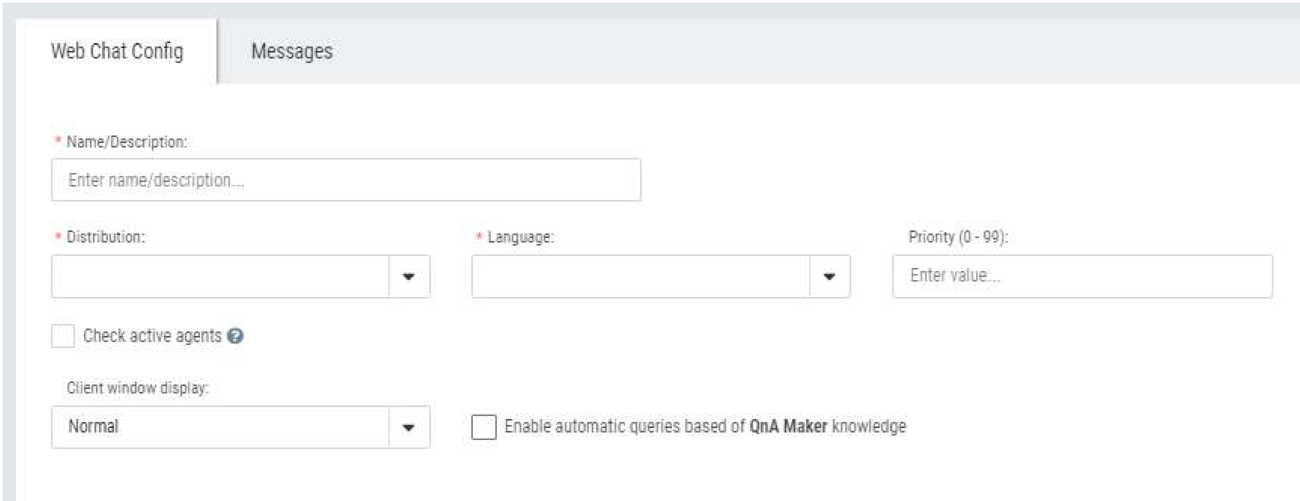
3. Click on the "Accounts" section of the campaign 1 and then click the button "NEW ACCOUNT" 2 :



4. Select the account type "Web Chat"::



5. Enter the required data



Name/Description: name that will identify the account in the system.

Distribution: criteria by which the chats that come from this account will be distributed to the operators.

Click here to expand...

Circular: assigns interactions to the operator who has been in the Available state for the longest time.

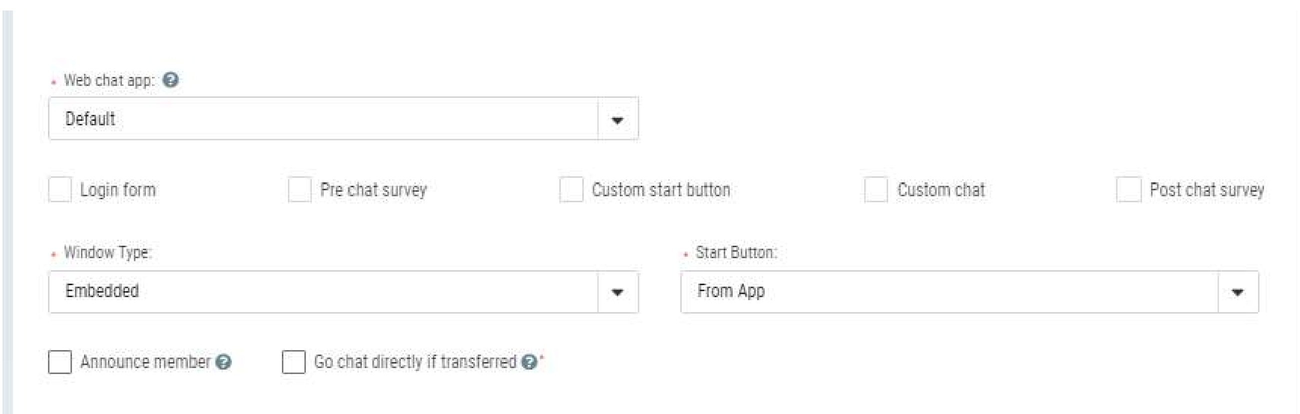
Queued: send new interactions to the campaign queue; to be taken or assigned manually.

Skill: the interactions will be assigned to the operators who have the highest ratings in terms of the skills required for each campaign; the "Circular" algorithm is applied to select between operators who receive the same skill score. If you select this, you must indicate the agent skills that you want to consider in the distribution.

Priority: defines the priority of the chats of this account with respect to the communications that come from others; the higher the number that is entered, the higher the priority. *Optional.*

Spell Checker Language: Language that the operator's spell checker will use when typing in the chat window.

6. **Front End Configuration:**



Chat App: here you can select the chat front-end that you want to use for this account. This is the interface that will be displayed embedded in the website or that will open when clicking a certain button or link on a page.

You can leave the chat that comes as default or, from the drop-down list, you can select a front-end previously designed from WebDesigner.

The chat window can have the design that comes by default or it can have a totally customized design. In turn, the front-end can include a login, start button and pre-chat and/or post-chat survey. Selecting a chat from the list will display the front-end customizations included for this chat.

Window type: from here you select how the chat window will be displayed within the site. The options are:

"*Embedded*": embedded within the same web page.

"*Pop* Up": by means of a new pop-up window.

Start button: here you will define how the start button will be placed on the main page. The options are:

"*From App*": the start button will be defined in the application itself.

"Page Control": if selected, you must indicate the ID of the button that will allow the user to start the chat from the website.

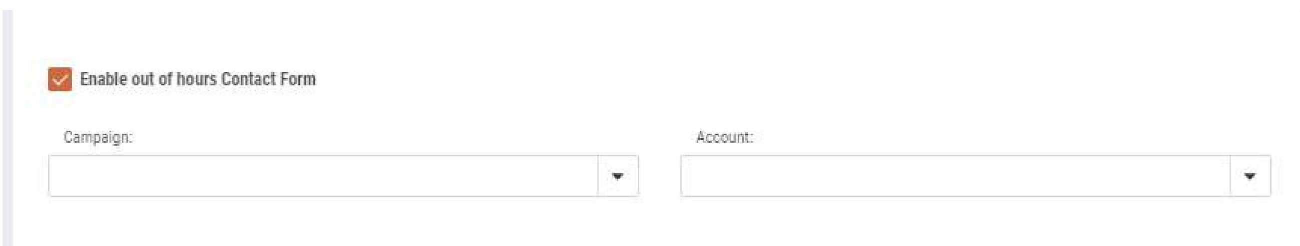
Announce Member: if this option is selected, a message will be displayed to the user indicating that an agent has been assigned to attend them.

Go to chat directly if was transferred: if this option is selected, when the interaction is transferred, the operator will directly view the chat window.

7. Snippet Code:

Snippet Code: Javascript code generated automatically by the system which must be inserted in the web page where you want to enable the WebChat service.

8. **Out of hours:**

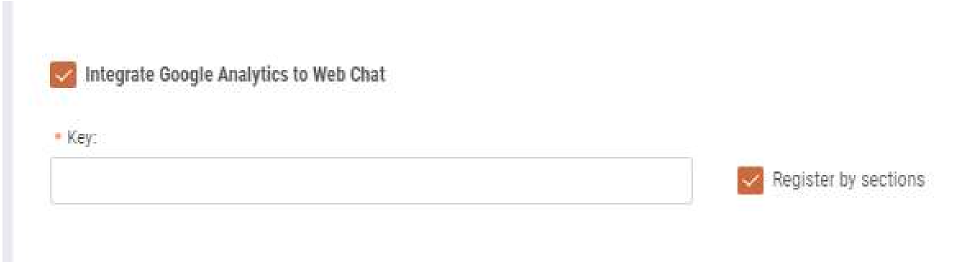


Enabled: if you check this box, you will be enabling your contacts to leave messages while the campaign is out of the scheduled hours.

Campaign: select from the drop-down list the campaign of the Contact Form account where the messages left by your contacts will be entered while the campaign is out of the scheduled hours.

Account: select from the drop-down list the Contact Form account where the messages left by your contacts will be entered while the campaign is out of the scheduled hours.

9. **Google Analytics:**

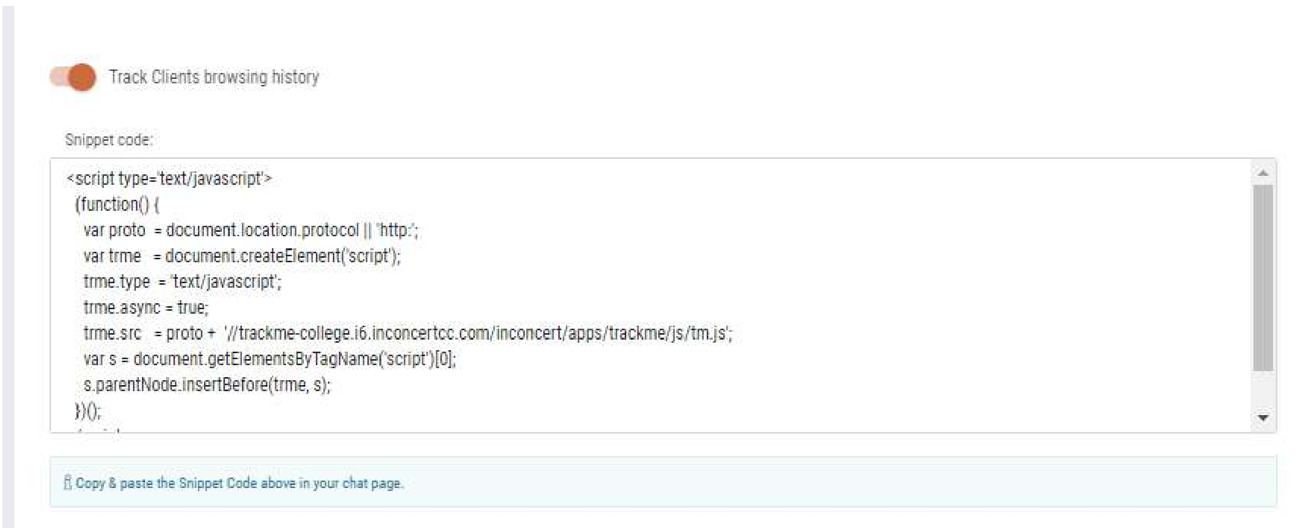


Enabled: if you check this box, you will be enabling the option to set a password to send grouped information on web traffic to the client's google analytics.

Key: API authentication key of the Google Analytics account.

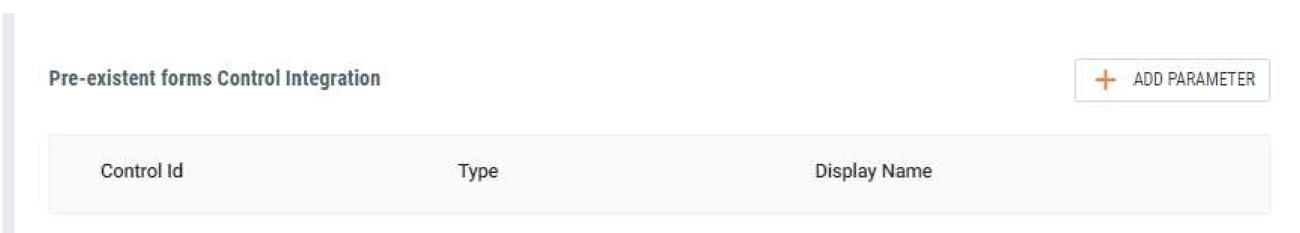
Register by sections: if you check this box, the information will be registered by sections.

10. **Track Browsing History:**



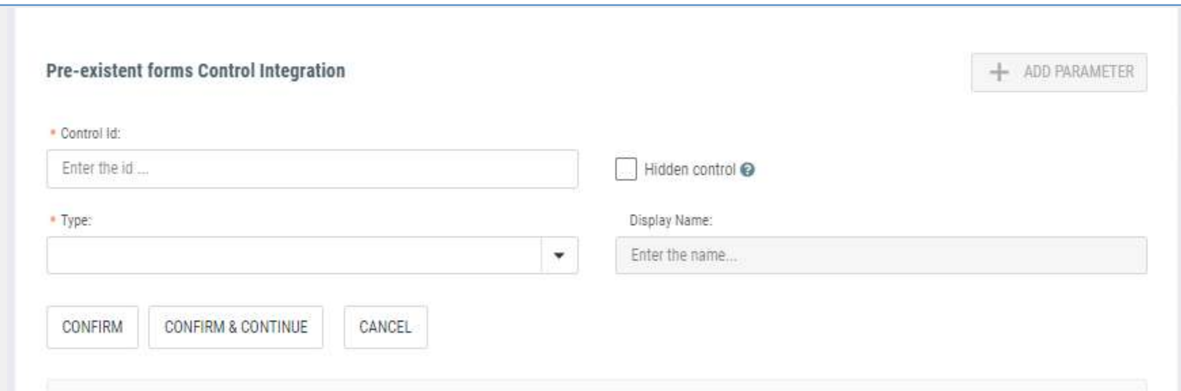
On checking the "Enabled" box, you must paste the code shown on the web page where the Web Chat service will be enabled and you will then be able to view the browsing data of your contacts.

11. **Pre-existent Controls Integration:**



These are widely used if your clients must previously log into the web to start a chat session; in this way you will be able to obtain certain required parameters and thus not request them again while attending to the client. For this, you configure them with their corresponding type, and, when generating the interaction, the system recognizes that the ID "name", for example, is as a field and it is sent.

By clicking the "NEW PARAMETER" button, you will be able to define if you want to capture values that refer to controls that exist where you have the Web Chat service enabled:

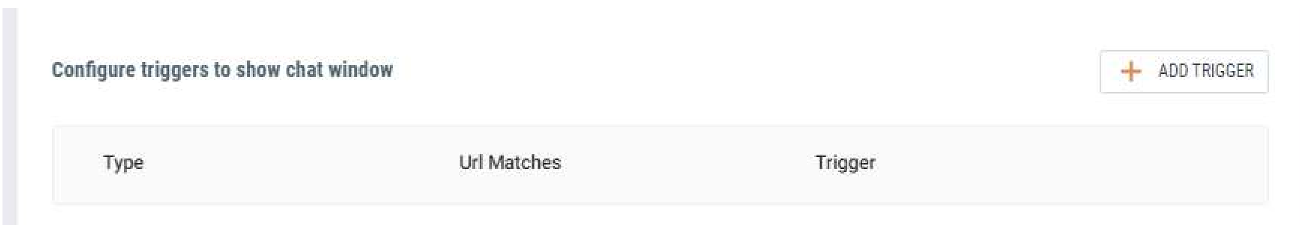


Control ID: unique identifier of the field on the web where you have enabled the Web Chat service.

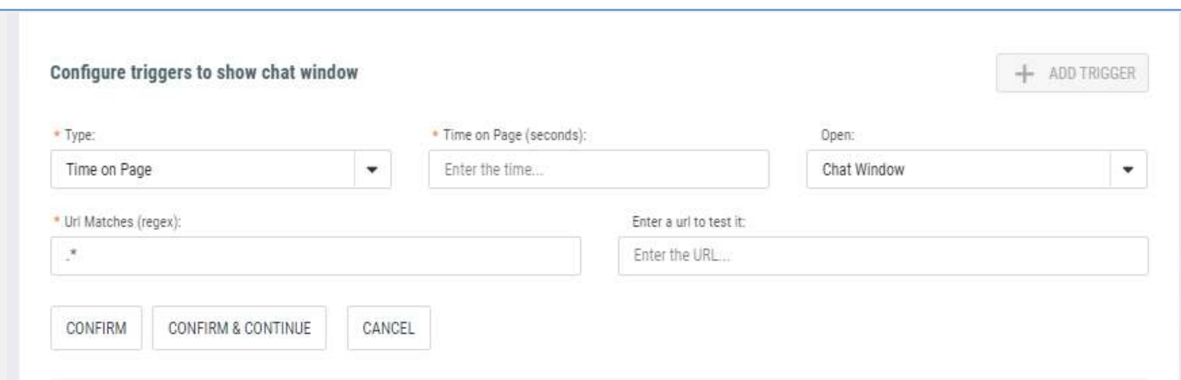
Type: refers to the type of field associated with the Control ID entered. *The options are: ID, Name, Phone number, Email and Custom.*

Click the "CREATE" button to save the control defined or "CREATE & CONTINUE" to save and continue creating controls. If you want to discard the changes, click the "CANCEL" button

12. **Triggers:**



By clicking the "NEW TRIGGER" button, you will be able to define if you want a chat window to open automatically after the contact has remained on a web page for a certain time:



Type: by default, the trigger will be executed by the Time on Page.

URL matches (regex): refers to the URL where the chat window will be opened, after the Time on Page has elapsed.

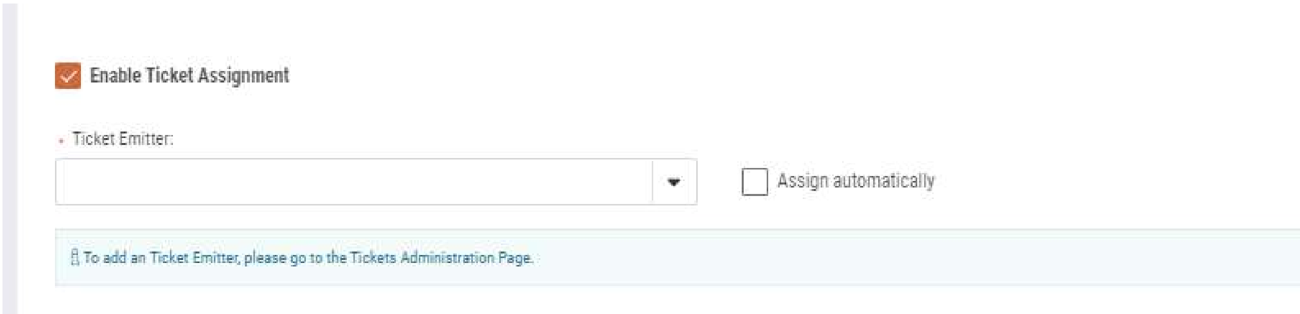
Time on Page: time in seconds that must elapse while the contact remains on the URL, for the chat window to be opened.

Open: select from the drop-down list whether the chat window will open minimized (Minimized Chat) or not (Chat Window).

Click the "CREATE" button to save the trigger defined or "CREATE & CONTINUE" to save and continue creating triggers. If you want to discard the changes, click the "CANCEL" button.

13. **Attention Level:** You will be able to select from among the *Attention Levels* previously created, the one most appropriate for the operation of this account.

14. **Ticket manager:** You can enable *Tickets Management* to manually or automatically assign tickets to the interactions associated with this account, and you can also select a previously configured ticket issuer



Assign tickets: if you check this box, you will be enabling the option to assign tickets to the interactions belonging to this account.

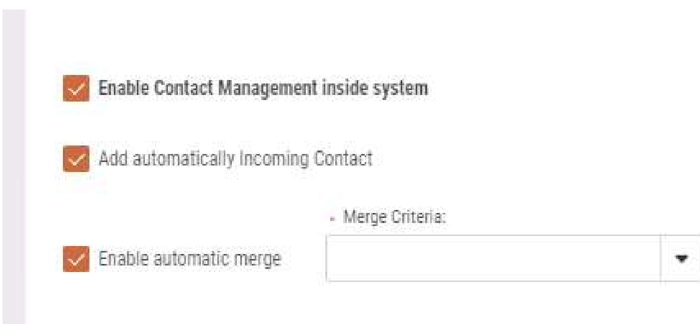
Automatic: if this box is checked, the tickets will be assigned automatically.

***Ticket issuer:**

Click here to expand...

You will need to select a previously configured ticket issuer, see How to create an issuer.

15. **Gestión de contactos:**



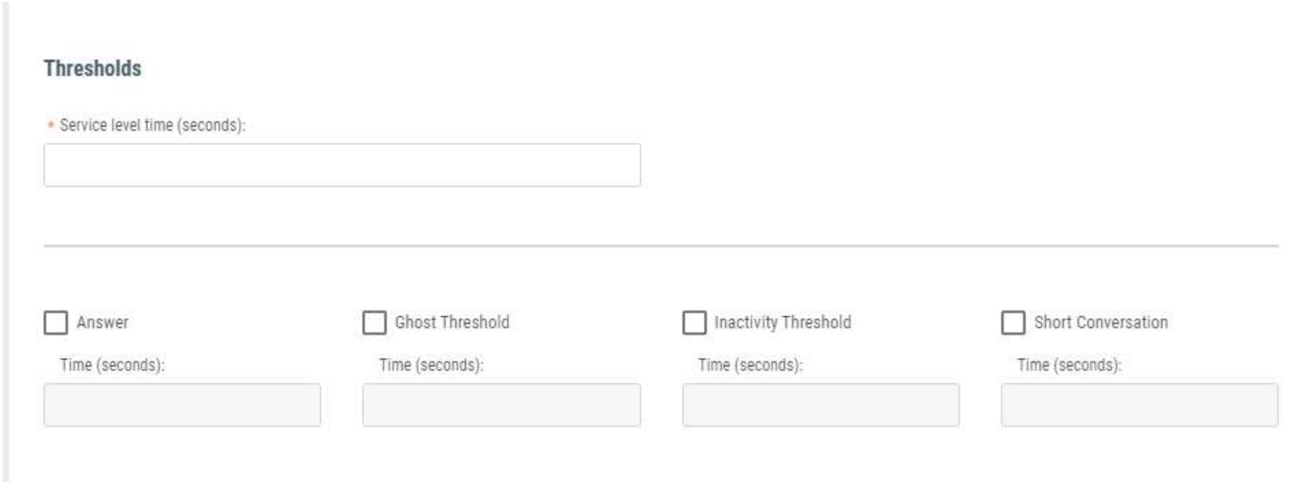
Contact management: if you check this box, you will be enabling the option to create a new contact with each interaction.

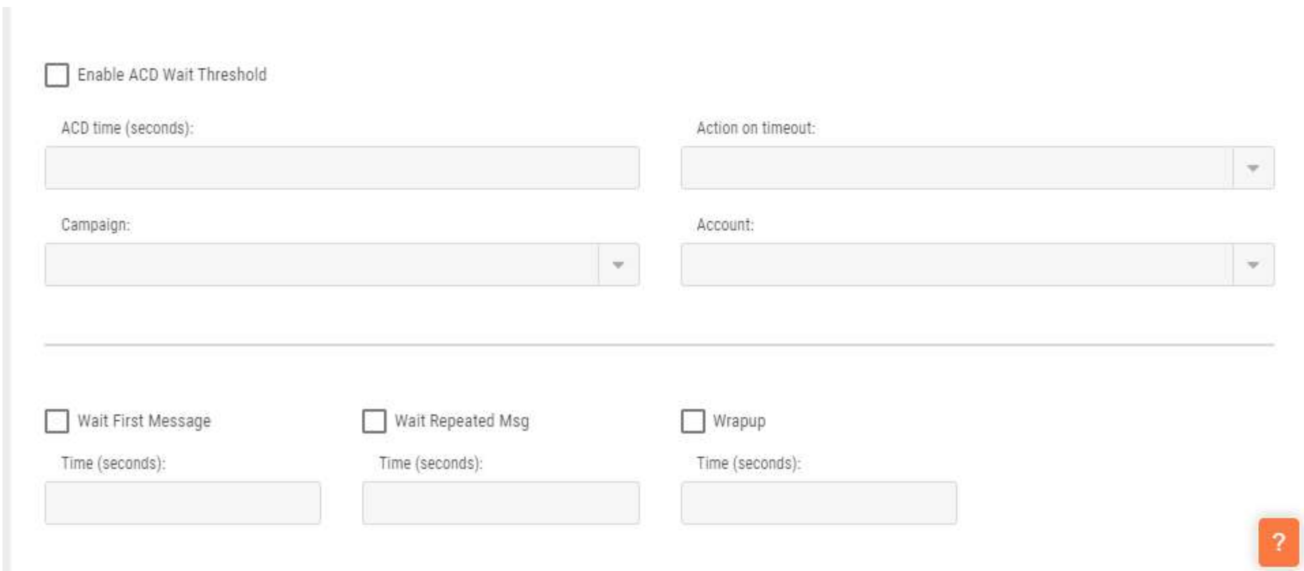
Auto Add Contact: if you check this box, the system will automatically create a new contact for each interaction. *If it is not checked, contacts will be created manually.*

Automatic unification: after checking this box, you must define the criteria for saving the contact data. You can either keep the contact data already stored, or update the data in each new interaction.

16. **Umbrales**:

This information is not specific to the account but will be common to all accounts in the channel. Editing from here will only be possible if the account being defined is the first of its type, otherwise they will be read-only fields. To edit the channel thresholds, read: "How to edit the general channel settings".





Thresholds: here you specify the time **thresholds** for different service and operational actions.

Service Level: maximum answer time for the communication to be considered to have been attended within the desired service level.

17. After completing all the required fields, click the "SAVE ACCOUNT" button to continue.
18. To cancel the operation without saving the data entered, click the "CANCEL ACCOUNT" button

The files attached to a *Webchat* conversation are saved in the repository, so they can be accessed once the *Webchat* session has ended.

Artículos Relacionados

- Cómo asociar una cuenta de Correo
- Cómo crear una cuenta de Llamadas
- Cómo crear una cuenta de Formulario de contacto
- Cómo crear una cuenta de Llamadas (con Telefonia Nativa)
- Como crear una cuenta de Telefonia.

How to create a Web Chat account with Video Call

A *web chat* or *live chat* is a chat that is placed on a website and allows users to dialogue in real time with a contact center operator, who will answer their questions, support them in a purchase, etc.

Sometimes, depending on business requirements, a chat may have a ***pre-chat*** and ***post-chat*** form associated with it. In general, pre-chat forms ask the user to enter two or three pieces of data in order to identify them in the system, in case they are a user who has already been contacted on another occasion, and also to give a little context to the operator who will attend them.

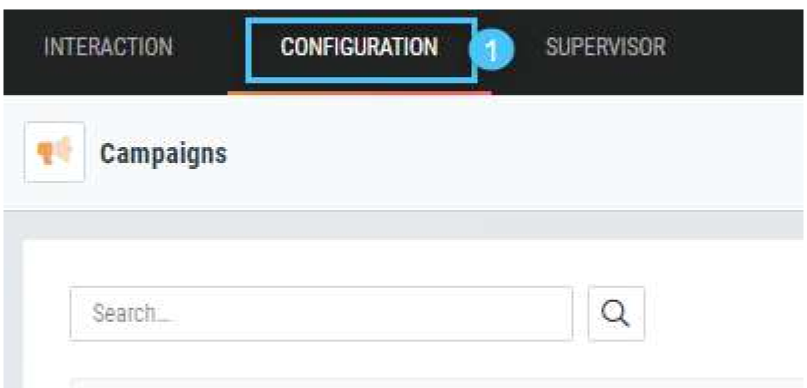
The post-chat, also called post-survey, on the other hand, is aimed at collecting information on the degree of client satisfaction with the service that was provided.

Both forms, like the chat interface, can be designed using the **WebDesigner** application.

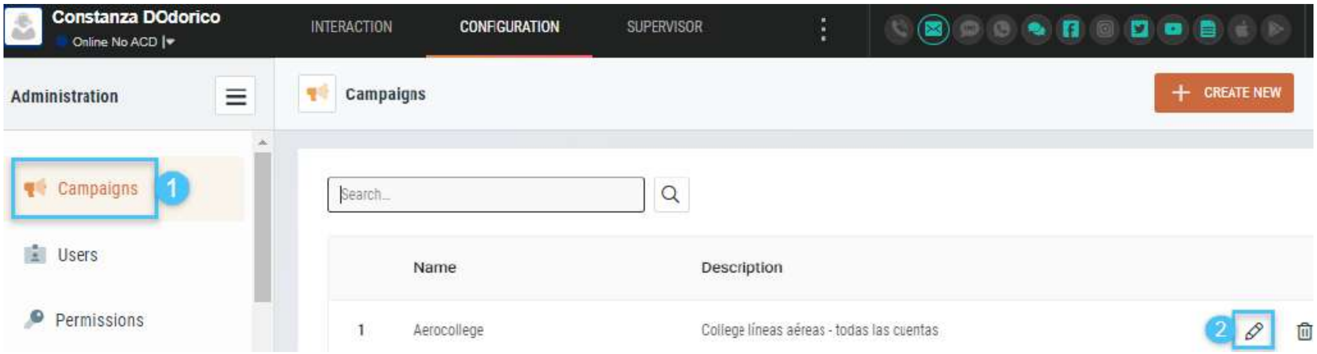
Additionally you can configure your Web Chat to incorporate the Video Call option.

To create a Web Chat account in a campaign

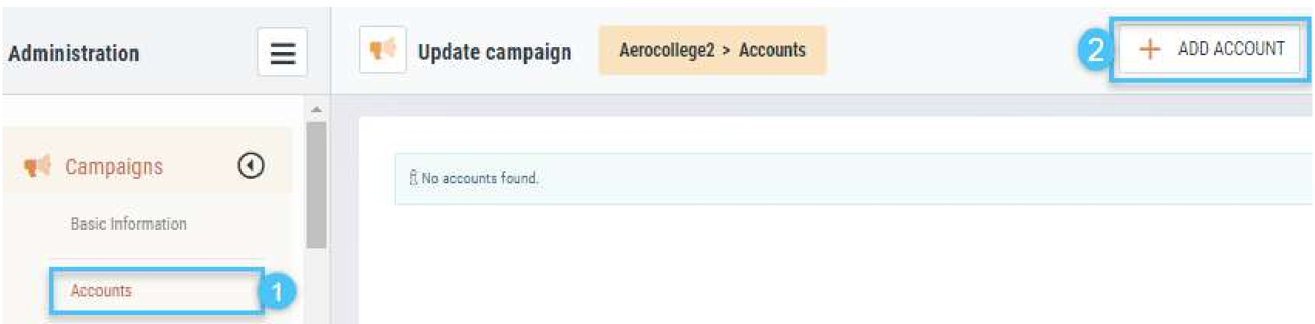
1. Go to the ***"Configuration"*** tab:



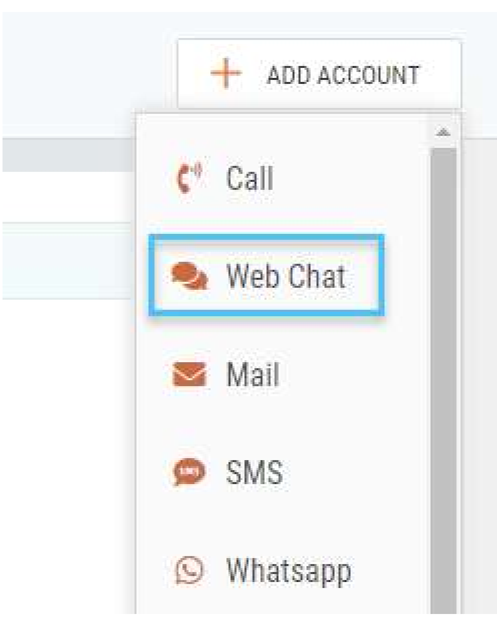
2. ***Click on the "Campaigns" section*** and then ***click the "Edit" button*** of the campaign where the account will be created :



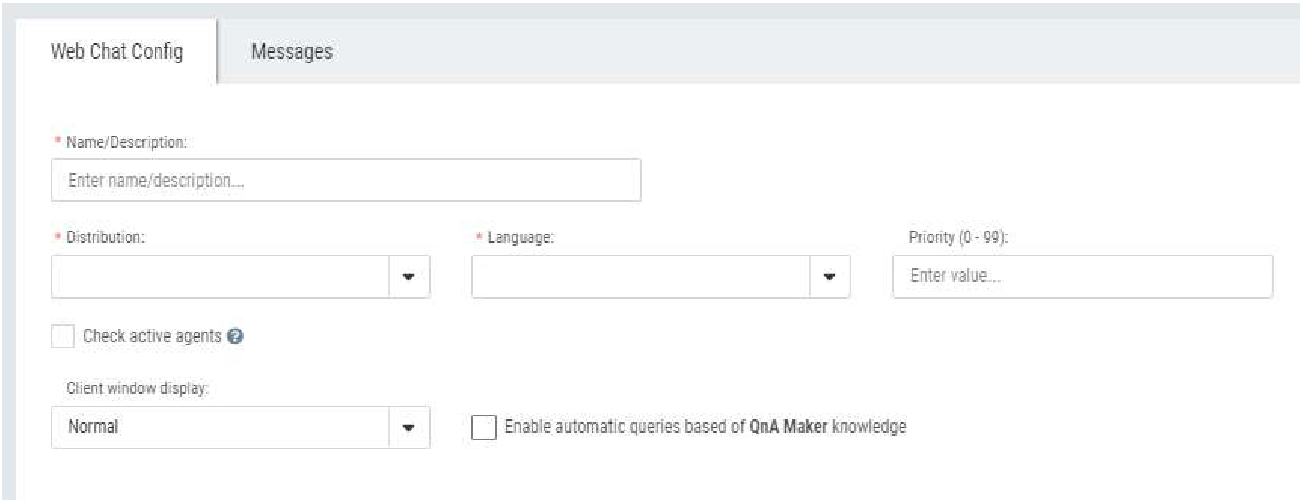
3. Click on the "Accounts" section of the campaign and then click the button "NEW ACCOUNT" :



4. ***Select the account type "Web Chat":***



5. ***Enter the required data:***



Name/Description: name that will identify the account in the system.

Distribution: criteria by which the chats that come from this account will be distributed to the operators

Click here to expand...

Circular: assigns interactions to the operator who has been in the Available state for the longest time.

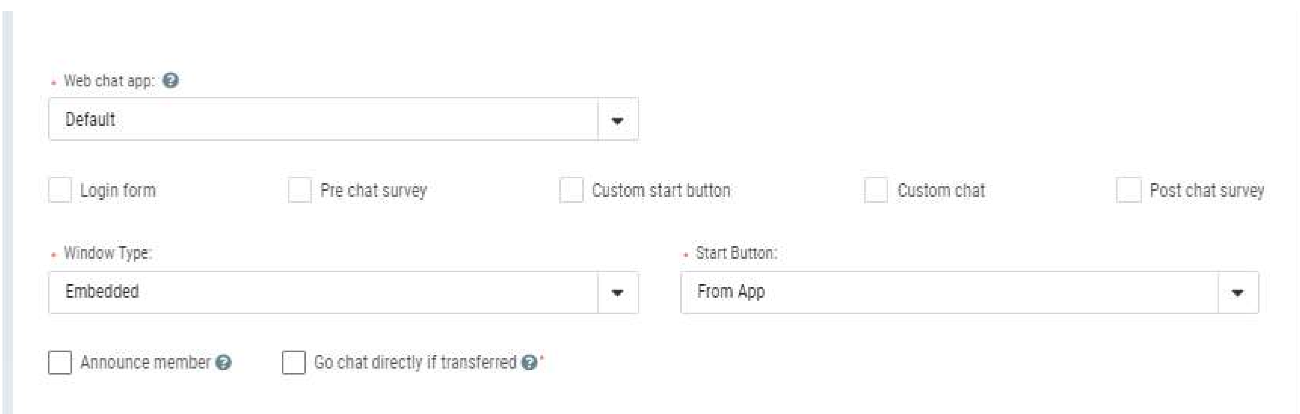
Queued: send new interactions to the campaign queue; to be taken or assigned manually.

Skill: the interactions will be assigned to the operators who have the highest ratings in terms of the skills required for each campaign; the "Circular" algorithm is applied to select between operators who receive the same skill score. If you select this, you must indicate the agent skills that you want to consider in the distribution.

Priority: defines the priority of the chats of this account with respect to the communications that come from others; the higher the number that is entered, the higher the priority. *Optional.*

Spell Checker Language: Language that the operator's spell checker will use when typing in the chat window.

6. **Front End Configuration:**



Chat App: here you can select the chat front-end that you want to use for this account. For a Webchat with video call, ***the option "WCWebrtcJanus" must be selected. To learn how to install this feature, read: Installation/configuration for Video Calls***

The chat window can have the design that comes by default or it can have a totally customized design. In turn, the front-end can include a login, start button and pre-chat and/or post-chat survey. Selecting a chat from the list will display the front-end customizations included for this chat.

Window type: from here you select how the chat window will be displayed within the site. The options are:

"*Embedded*": embedded within the same web page.

“*Pop* Up”: by means of a new pop-up window.

Start button: here you will define how the start button will be placed on the main page. The options are:

"*From App*": the start button will be defined in the application itself.

"Page Control": if selected, you must indicate the ID of the button that will allow the user to start the chat from the website.

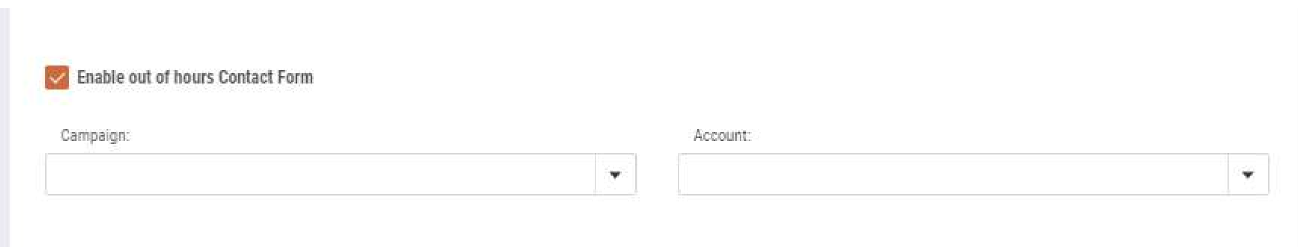
Announce Member: if this option is selected, a message will be displayed to the user indicating that an agent has been assigned to attend them.

Go to chat directly if was transferred: if this option is selected, when the interaction is transferred, the operator will directly view the chat window.

7. **Snippet Code**:

Snippet Code: Javascript code generated automatically by the system which must be inserted in the web page where you want to enable the WebChat service.

8. **Out of hours:**

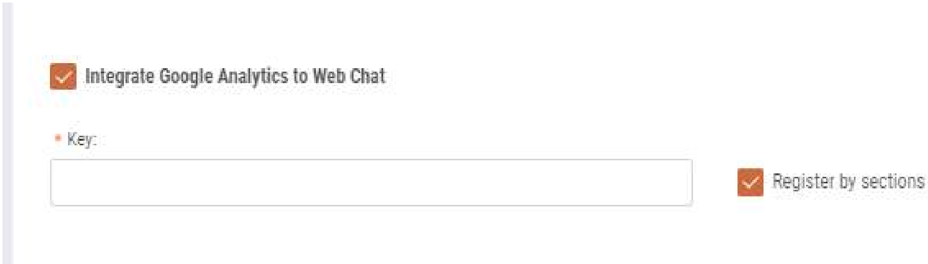


Enabled: if you check this box, you will be enabling your contacts to leave messages while the campaign is out of the scheduled hours.

Campaign: select from the drop-down list the campaign of the Contact Form account where the messages left by your contacts will be entered while the campaign is out of the scheduled hours.

Account: select from the drop-down list the Contact Form account where the messages left by your contacts will be entered while the campaign is out of the scheduled hours.

9. **Google Analytics:**

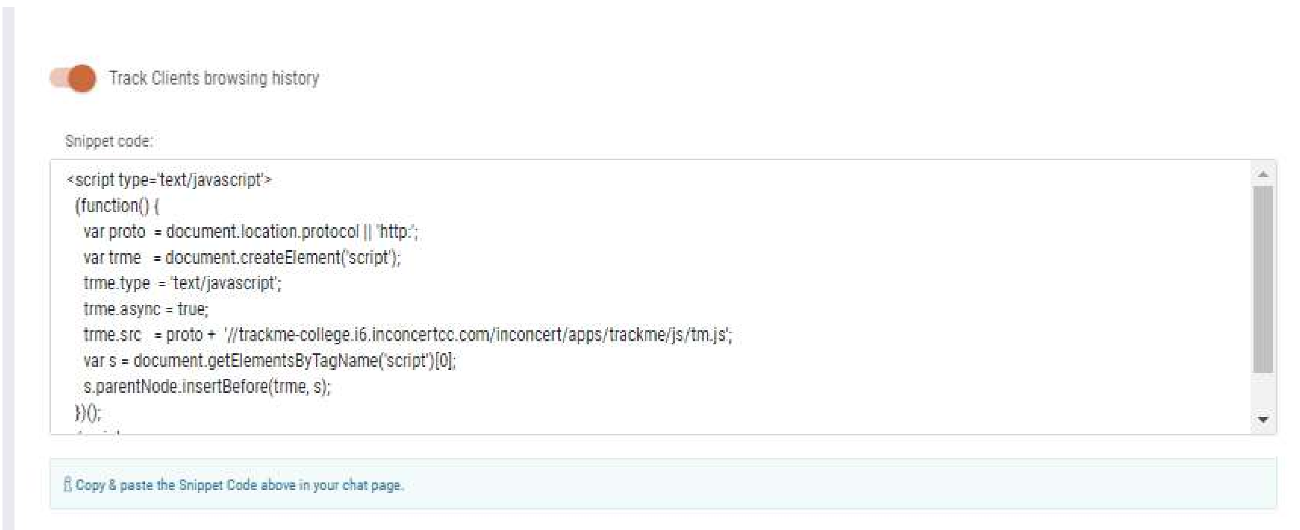


Enabled: if you check this box, you will be enabling the option to set a password to send grouped information on web traffic to the client's google analytics.

Key: API authentication key of the Google Analytics account.

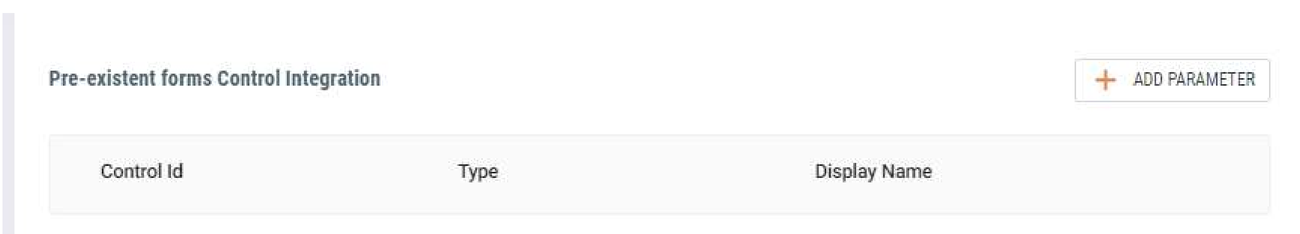
Register by sections: if you check this box, the information will be registered by sections.

10. **Track Browsing History:**



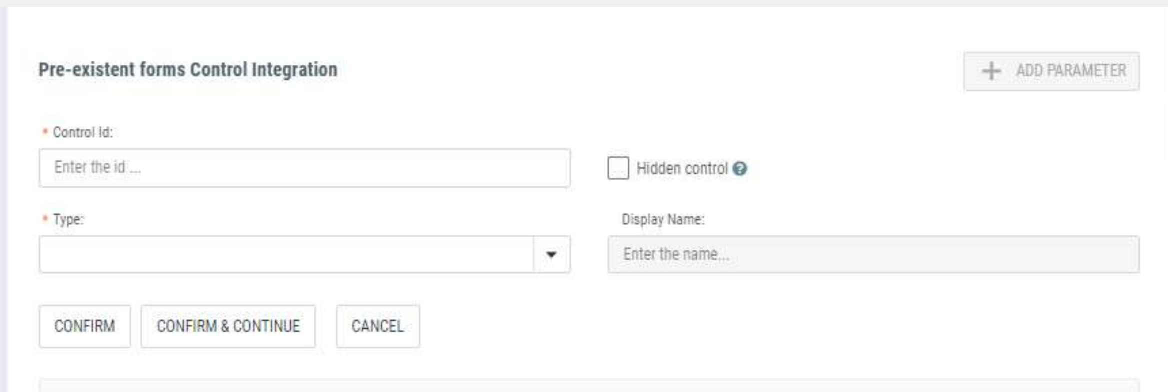
On checking the "Enabled" box, you must paste the code shown on the web page where the Web Chat service will be enabled and you will then be able to view the browsing data of your contacts.

11. **Pre-existent Controls Integration**



These are widely used if your clients must previously log into the web to start a chat session; in this way you will be able to obtain certain required parameters and thus not request them again while attending to the client. For this, you configure them with their corresponding type, and, when generating the interaction, the system recognizes that the ID "name", for example, is as a field and it is sent.

By clicking the "NEW PARAMETER" button, you will be able to define if you want to capture values that refer to controls that exist where you have the Web Chat service enabled:

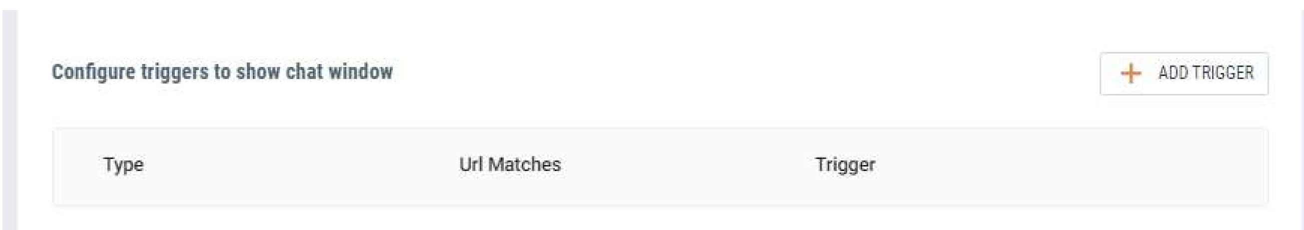


Control ID: unique identifier of the field on the web where you have enabled the Web Chat service.

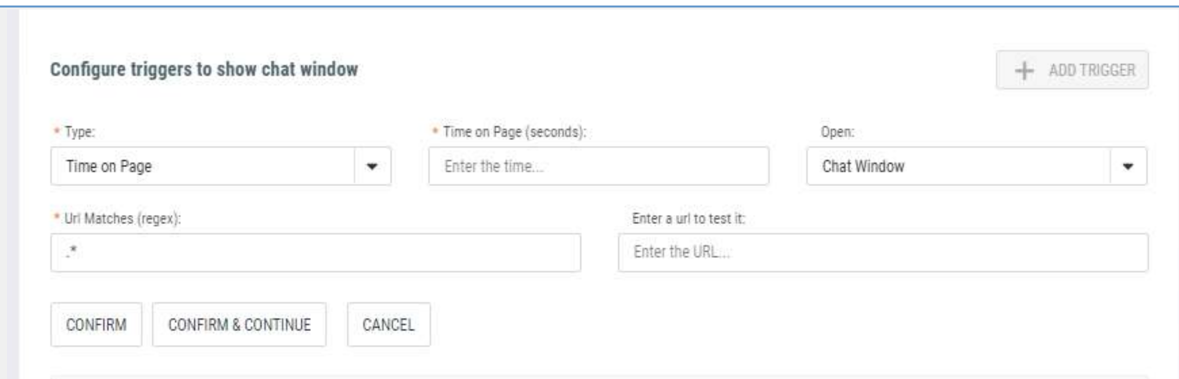
Type: refers to the type of field associated with the Control ID entered. *The options are: ID, Name, Phone number, Email and Custom.*

Click the "CREATE" button to save the control defined or "CREATE & CONTINUE" to save and continue creating controls. If you want to discard the changes, click the "CANCEL" button.

12. **Triggers:**



By clicking the "NEW TRIGGER" button, you will be able to define if you want a chat window to open automatically after the contact has remained on a web page for a certain time:



Type: by default, the trigger will be executed by the Time on Page.

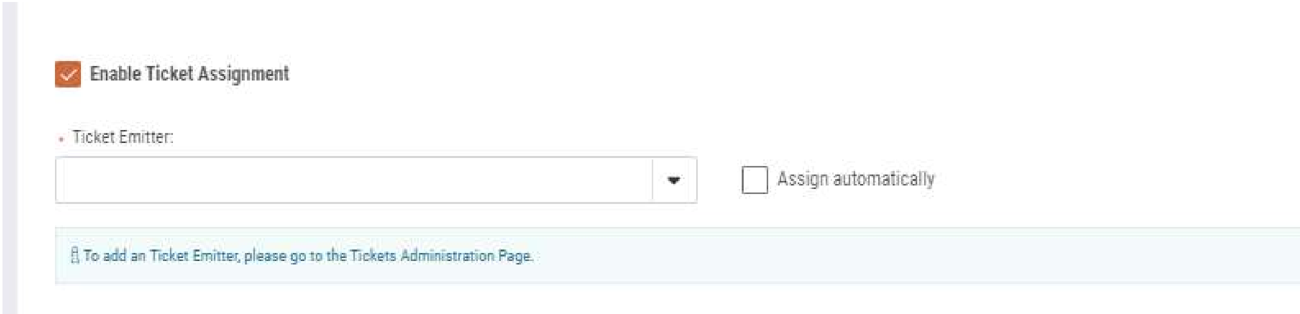
URL matches (regex): refers to the URL where the chat window will be opened, after the Time on Page has elapsed.

Time on Page: time in seconds that must elapse while the contact remains on the URL, for the chat window to be opened.

Open: select from the drop-down list whether the chat window will open minimized (Minimized Chat) or not (Chat Window).

Click the "CREATE" button to save the trigger defined or "CREATE & CONTINUE" to save and continue creating triggers. If you want to discard the changes, click the "CANCEL" button.

13. **Attention Level:** You will be able to select from among the *Attention Levels* previously created, the one most appropriate for the operation of this account.
14. **Ticket manager:** You can enable *Tickets Management* to manually or automatically assign tickets to the interactions associated with this account, and you can also select a previously configured ticket issuer.



Assign tickets: if you check this box, you will be enabling the option to assign tickets to the interactions belonging to this account.

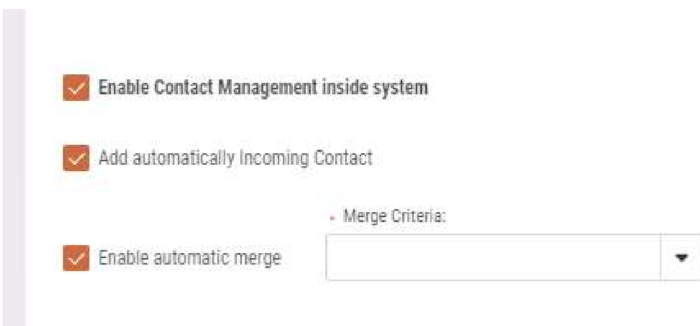
Automatic: if this box is checked, the tickets will be assigned automatically.

***Ticket issuer:**

Click here to expand...

You will need to select a previously configured ticket issuer, see How to create an issuer.

15. **Contact management:**



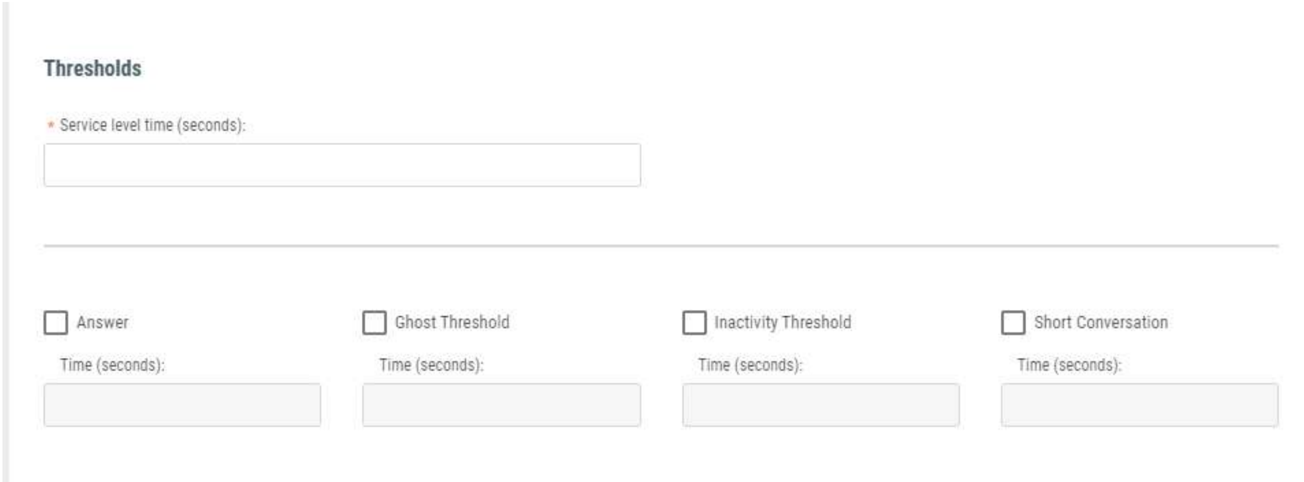
Contact management: if you check this box, you will be enabling the option to create a new contact with each interaction.

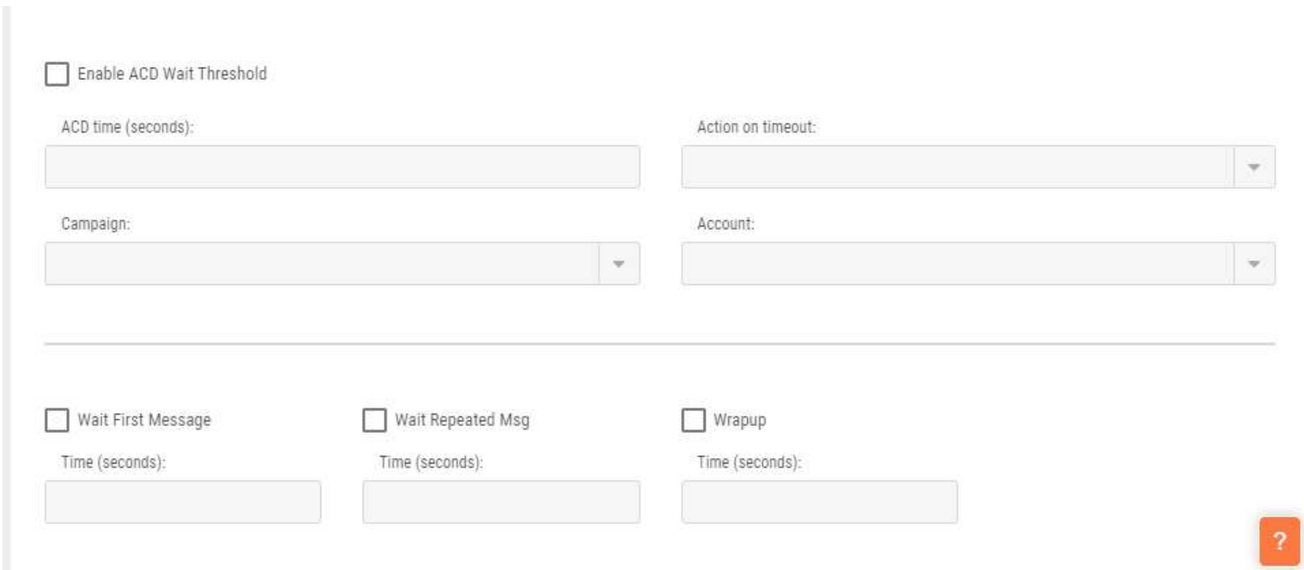
Auto Add Contact: if you check this box, the system will automatically create a new contact for each interaction. *If it is not checked, contacts will be created manually.*

Automatic unification: after checking this box, you must define the criteria for saving the contact data. You can either keep the contact data already stored, or update the data in each new interaction.

16. **Thresholds**:

This information is not specific to the account but will be common to all accounts in the channel. Editing from here will only be possible if the account being defined is the first of its type, otherwise they will be read-only fields. To edit the channel thresholds, read: "How to edit the general channel settings".





Thresholds: here you specify the time **thresholds** for different service and operational actions.

Service Level: maximum answer time for the communication to be considered to have been attended within the desired service level.

17. After completing all the required fields, click the "SAVE ACCOUNT" button to continue.
18. To cancel the operation without saving the data entered, click the "CANCEL ACCOUNT" button.

The files attached to a *Webchat* conversation are saved in the repository, so they can be accessed once the *Webchat* session has ended.

Artículos Relacionados

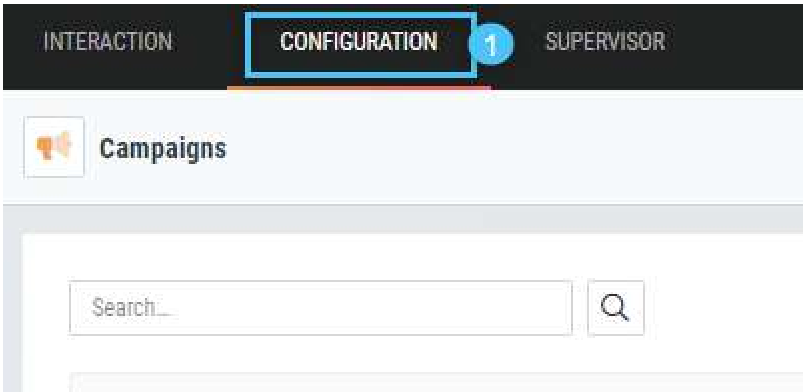
- Cómo asociar una cuenta de Correo
- Cómo crear una cuenta de Llamadas
- Cómo crear una cuenta de Formulario de contacto
- Cómo crear una cuenta de Llamadas (con Telefonia Nativa)
- Como crear una cuenta de Telefonia.

How to define a welcome message in a Web Chat account

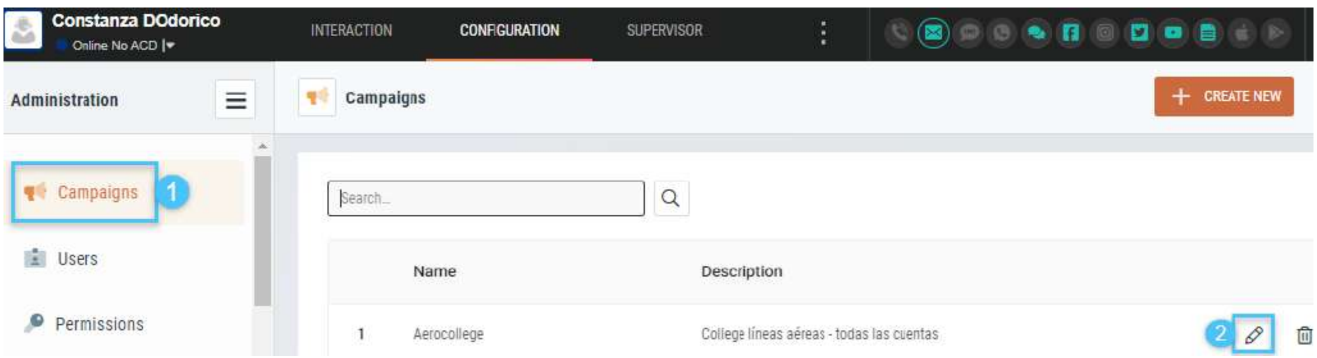
In inConcert Omnichannel, it is possible to define a welcome message that will be executed automatically when a user opens a Web Chat box.

Follow these steps to set up a welcome message on a Web Chat channel:

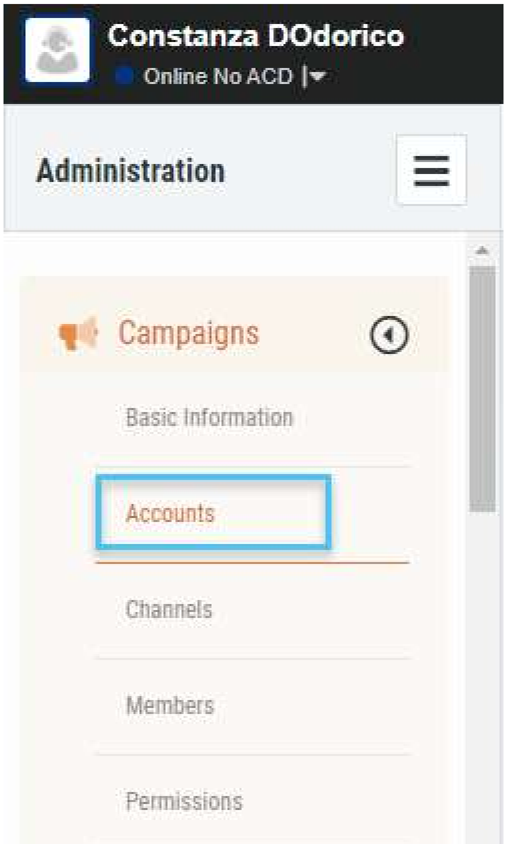
1. Go to the "*Configuration*" tab located at the top of the screen in the work environment in *OCC*.



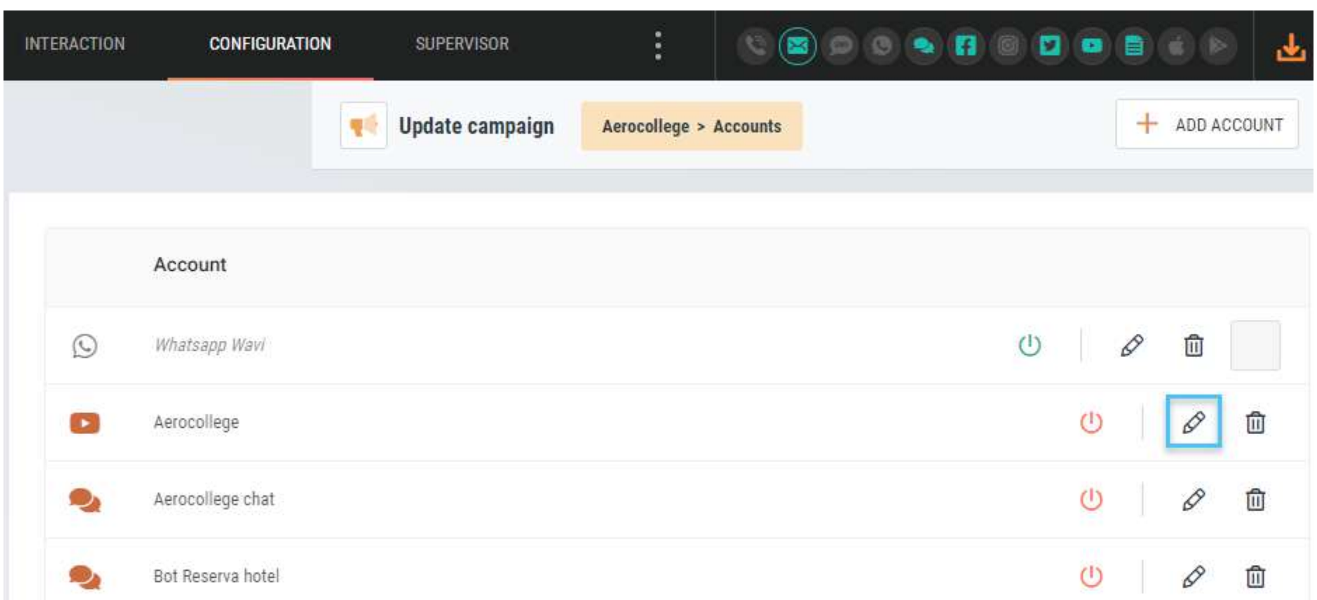
2. In the administration panel located on the left margin of the screen, click on the "*Campaigns*" tab 1, then click the "*Edit*" button 2 associated with the campaign in which you want to configure the welcome message.



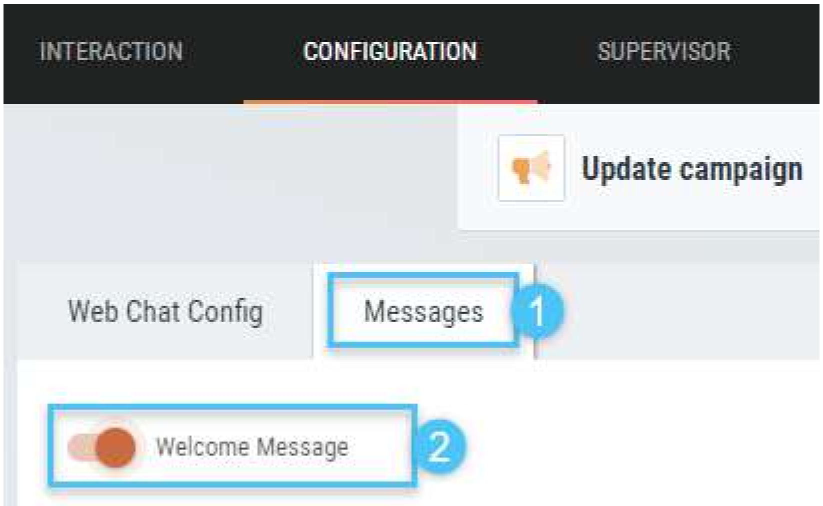
3. In the area on the left of your screen, a list of sections related to the administration of the campaign will be displayed, click on the "*Accounts* " section.



4. You will then see on the screen all the accounts associated with the campaign. Click the "*Edit*" button associated with the Web Chat account to which you want to assign the welcome message:

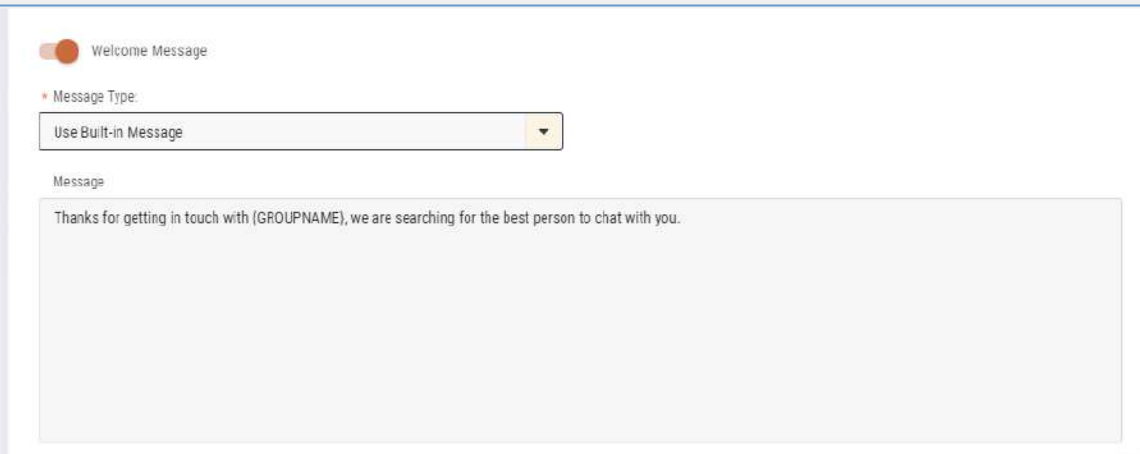


5. Then click on the "*Messages*" tab 1 and then click the confirmation box "*Welcome message*" 2 :



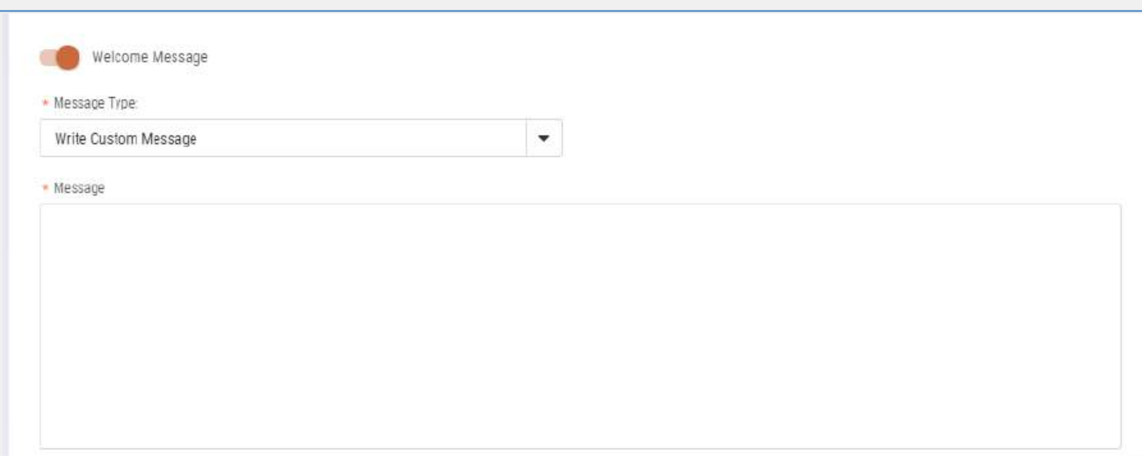
6. Then select the "Type of Message":

a. Use built-in message



If you select this option, the system will use a *predefined welcome message*. Where {GROUPNAME} is a variable to which the name of the campaign will be assigned.

b. Use custom message



If you select this option, it will be possible for you to write a welcome message.

7. Finally, click the "*SAVE*" button to save the changes made to the account.

Related Articles

- User search
- How to set up Messenger messaging
- How to associate a YouTube account
- How to associate an application from Google Play Store
- How to associate an application from the App Store

How to define a waiting message in a Web Chat account

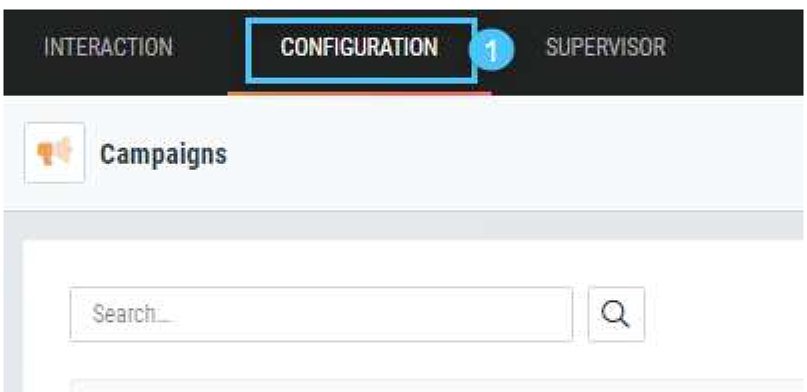
In inConcert Omnichannel it is possible to define a waiting message that will be executed automatically when a user generates an incoming interaction associated with that account and no agent is available to take it.

The message must indicate to the user their situation and their position in the queue while waiting to be attended by an agent.

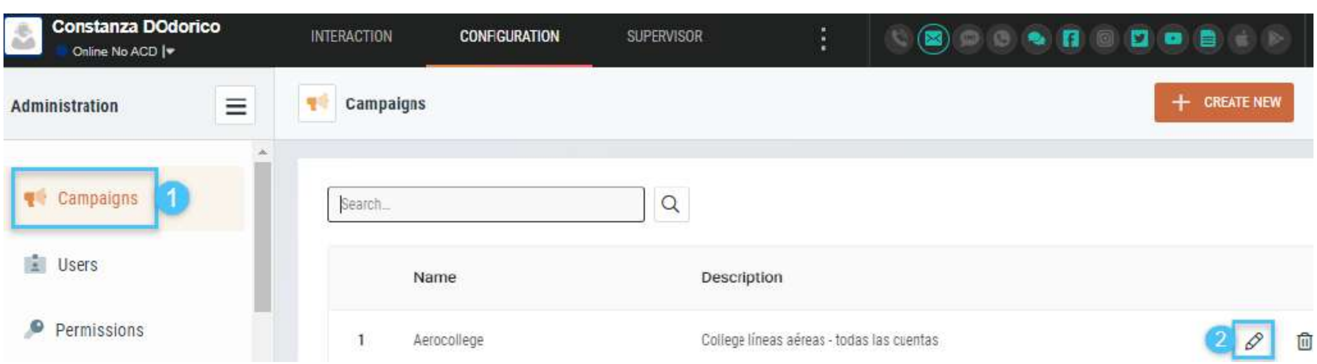
For this functionality to operate correctly, it is necessary to determine values of "*Wait First Message*" and "*Wait Repeated Message*" in the Thresholds configuration of the Web Chat channel.

Follow these steps to learn how to define this message:

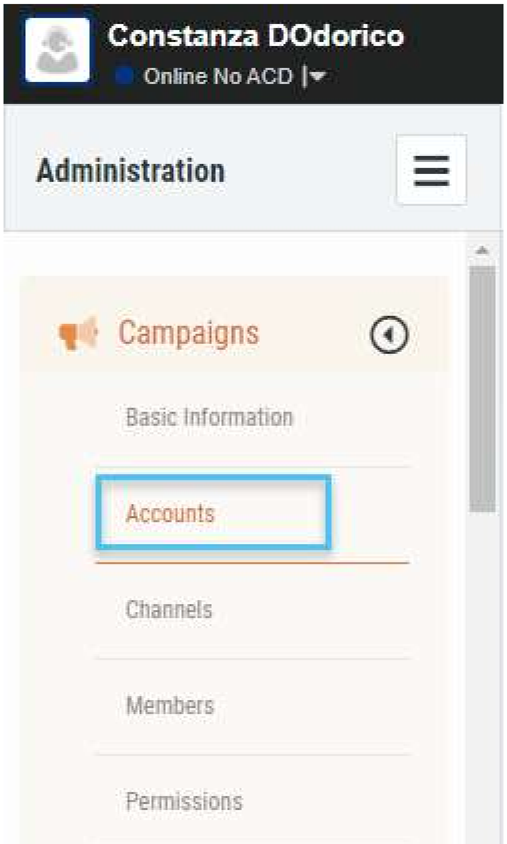
1. Go to the "*Configuration*" tab located at the top of the screen in the work environment in *OCC*.



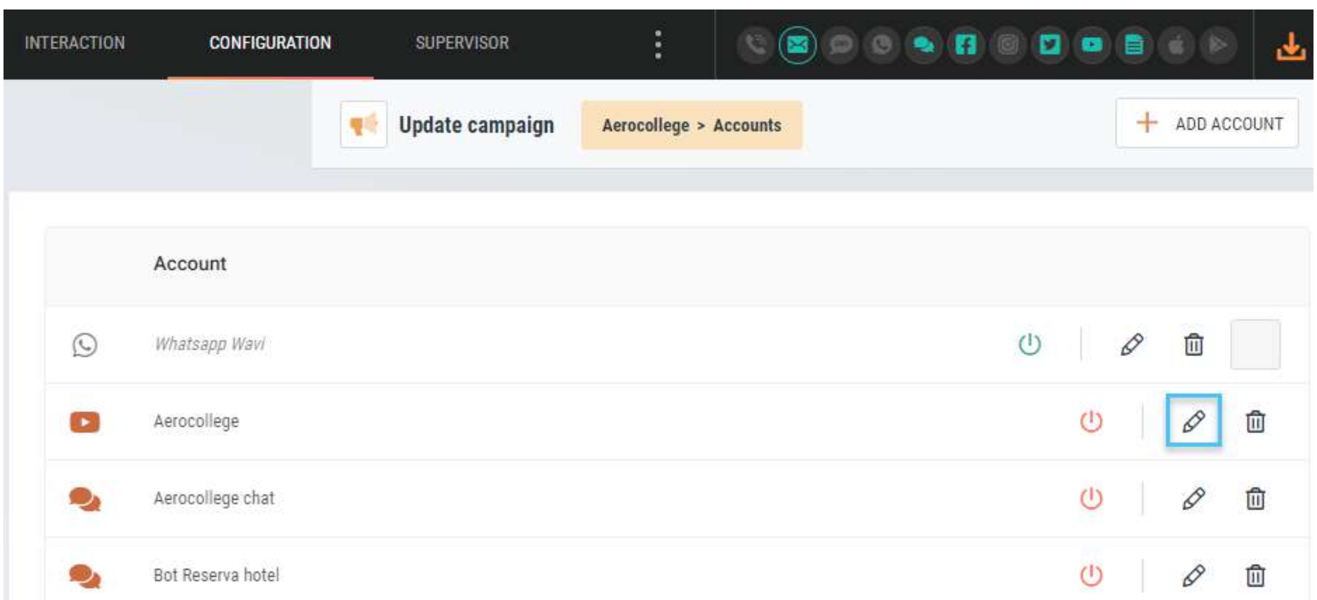
2. In the administration panel located on the left margin of the screen, click on the "*Campaigns*" tab 1 , then click the "*Edit*" button 2 associated with the campaign in which you want to configure the waiting message.



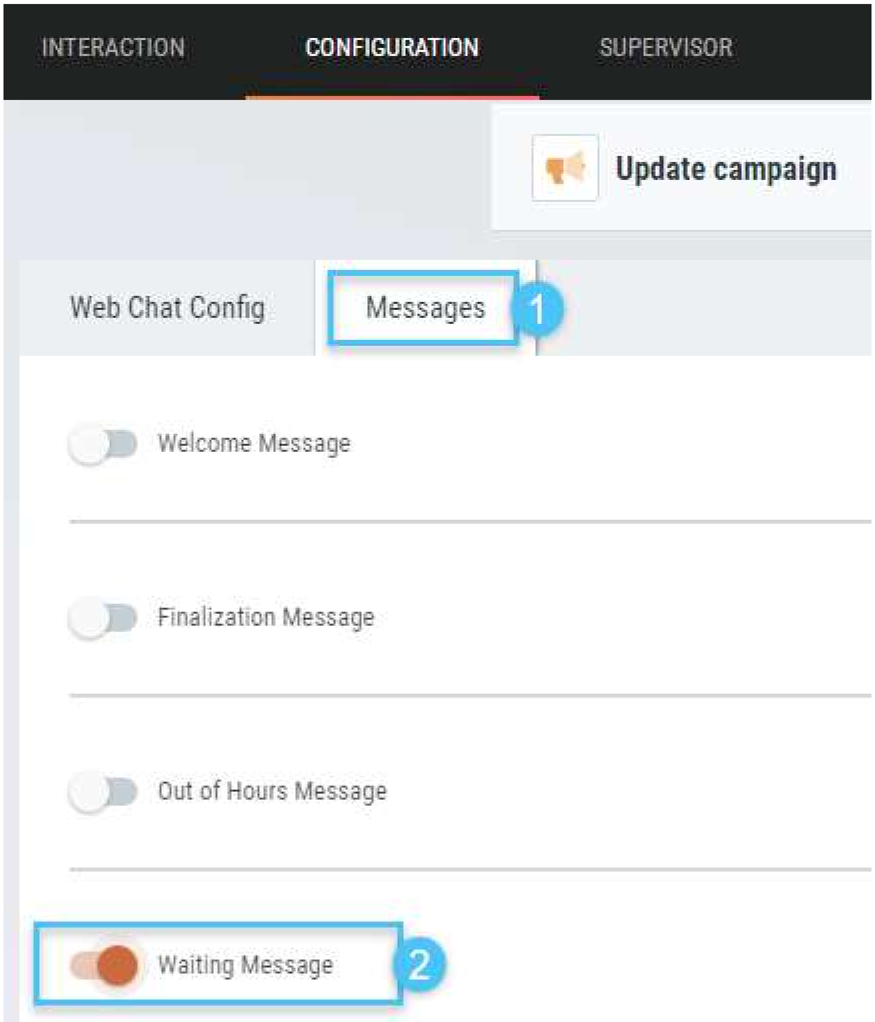
3. In the area on the left of your screen, a list of sections related to the administration of the campaign will be displayed, click on the "*Accounts* " section:



4. You will then see on the screen all the accounts associated with the campaign. Click the "*Edit*" button associated with the Web Chat account to which you want to assign the waiting message:



5. Then click on the "*Messages*" tab 1 and then click the confirmation box "*Waiting Message*" 2 :

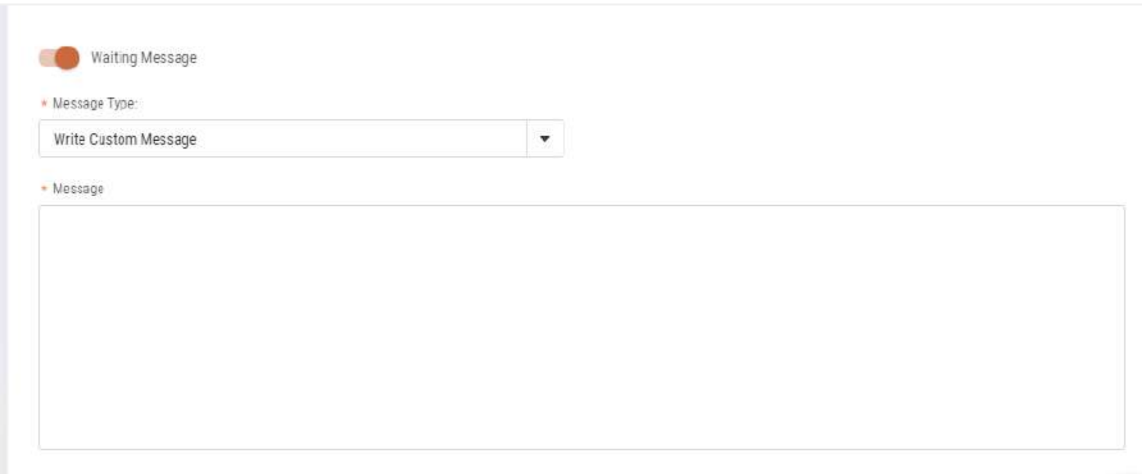


6. Then choose the "*Type of message*":

a. Use predefined message

If you select this option, the system will use a *predefined waiting message*. Where **{PLACE_ ON_QUEUE}** is a variable to which the user's position in the queue will be assigned.

b. Write a custom message



If you select this option, it will be possible for you to write a *custom waiting message*.

In this case, it is important to include the variable **{PLACE_ON_QUEUE}** that will indicate the position in the client's queue that generated the incoming interaction.

7. Finally, click the "SAVE" button to make the changes to the account.

Artículos Relacionados

- Paso 2: Instalación de inConcert OCC
- Cómo asociar una cuenta de Correo
- Cómo crear una Campaña
- Cómo crear una cuenta de Llamadas
- Cómo eliminar una Campaña

How to define a finalization mail in a Web Chat account

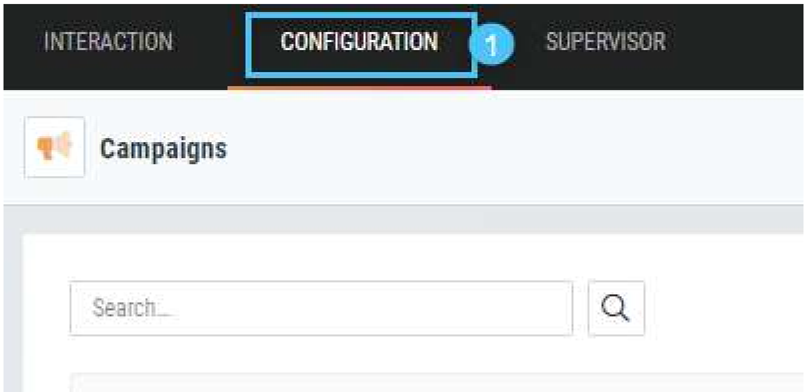
It is possible to configure the sending of an email at the end of an interaction in a Web Chat channel

This email can be sent automatically or manually, being controlled by the user or by the agent depending on the configuration.

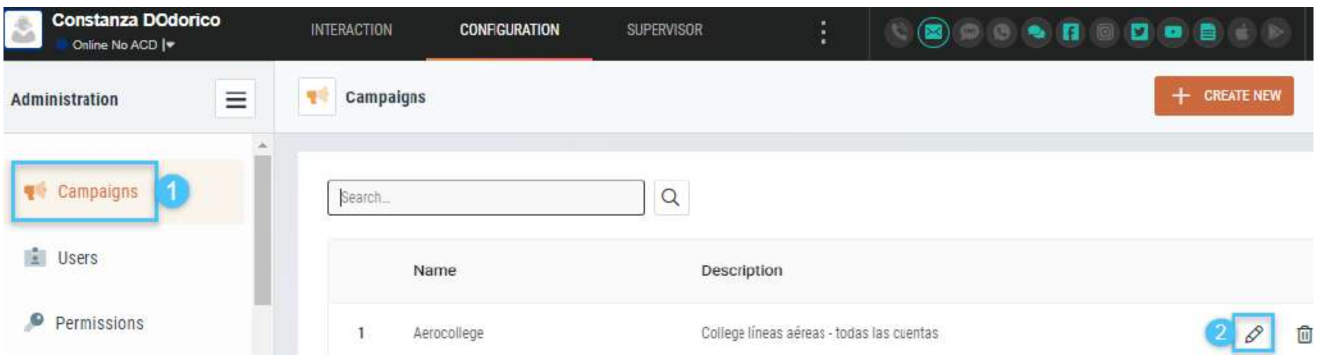
To make use of this functionality, it is necessary to associate a Web Designer form to the Web Chat channel, in which the client's email address is obtained through a pre-survey.

Follow these steps to correctly configure the finalization mail:

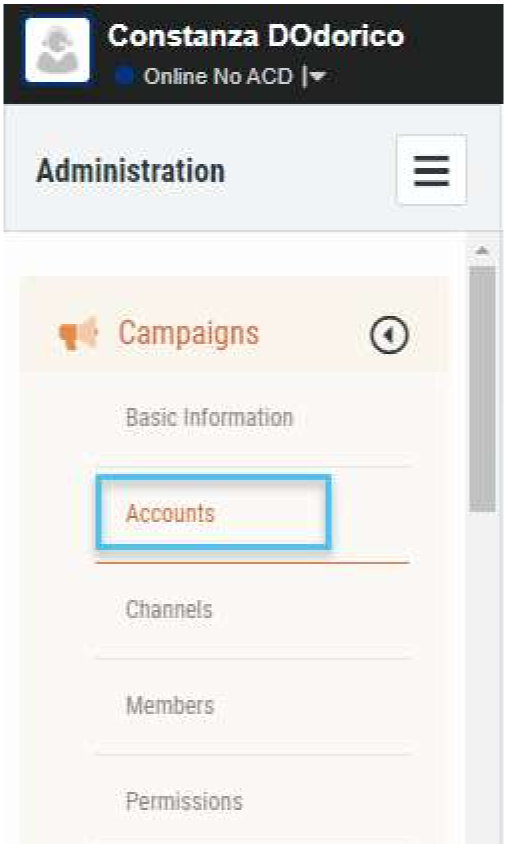
1. Go to the "*Configuration*" tab located at the top of the screen in the work environment in *OCC*.



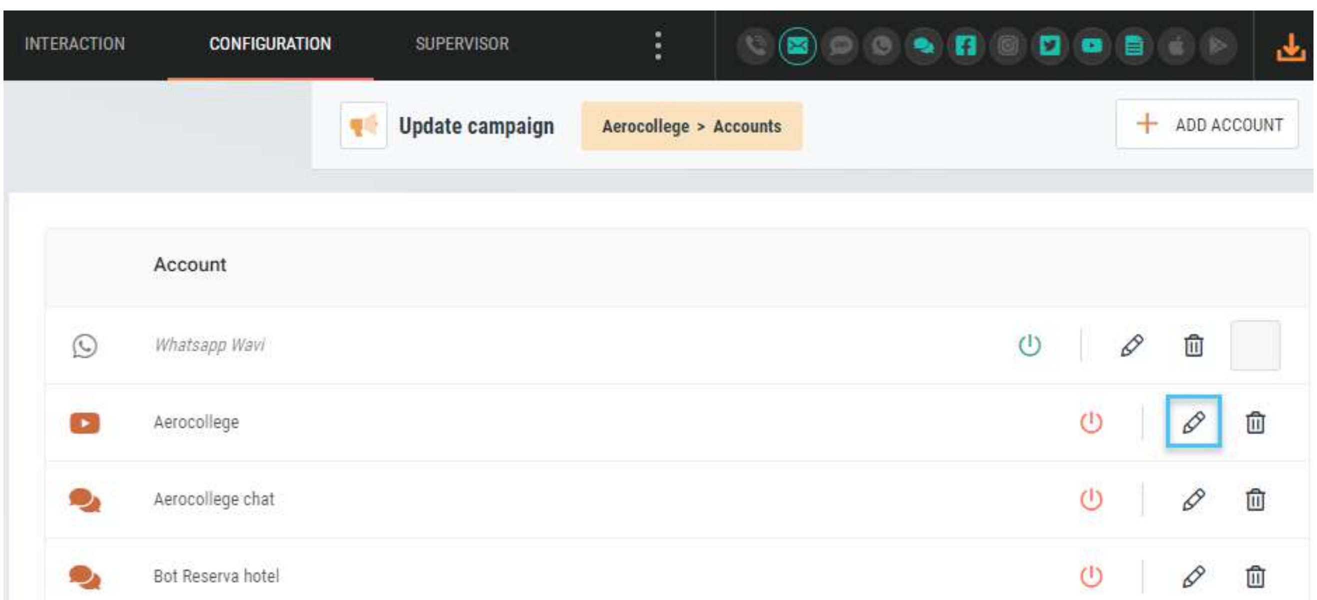
2. In the administration panel located on the left margin of the screen, click on the "*Campaigns*" tab 1 , then click the "*Edit*" button 2 associated with the campaign in which you want to define the finalization mail.



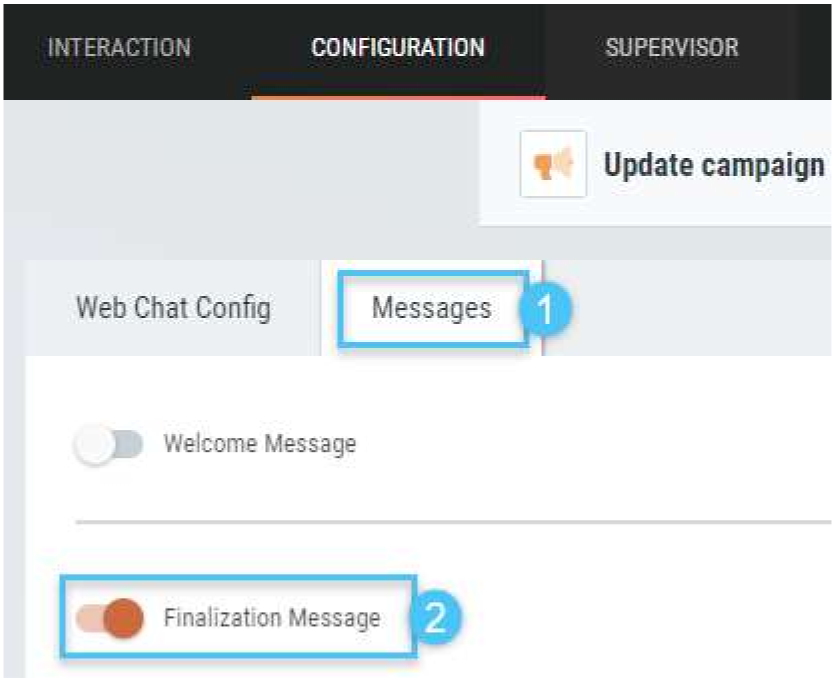
3. In the area on the left of your screen, a list of sections related to the administration of the campaign will be displayed, click on the "*Accounts* " section:



4. You will then see on the screen all the accounts associated with the campaign. Click the "*Edit*" button associated with the Web Chat account for which you want to define the finalization mail:



5. Then click on the "*Messages*" tab and then click on the confirmation box "*Finalization Message*": :



6. *Then select the "Send Type"*

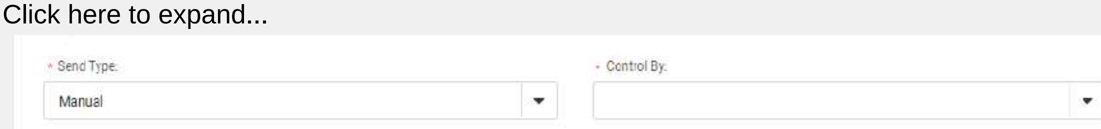
Click here to expand...

Automatic: If this Send Type is selected, whenever a Web Chat interaction with a contact is ended and this contact has an associated email account, the finalization mail will be automatically sent.

Manual: If this Send Type is selected, the agent who attended the interaction or the user who generated it will have the option to manually determine if the finalization mail is sent.

If this Send Type is selected, you must configure the "*Control By*" section:

Click here to expand...

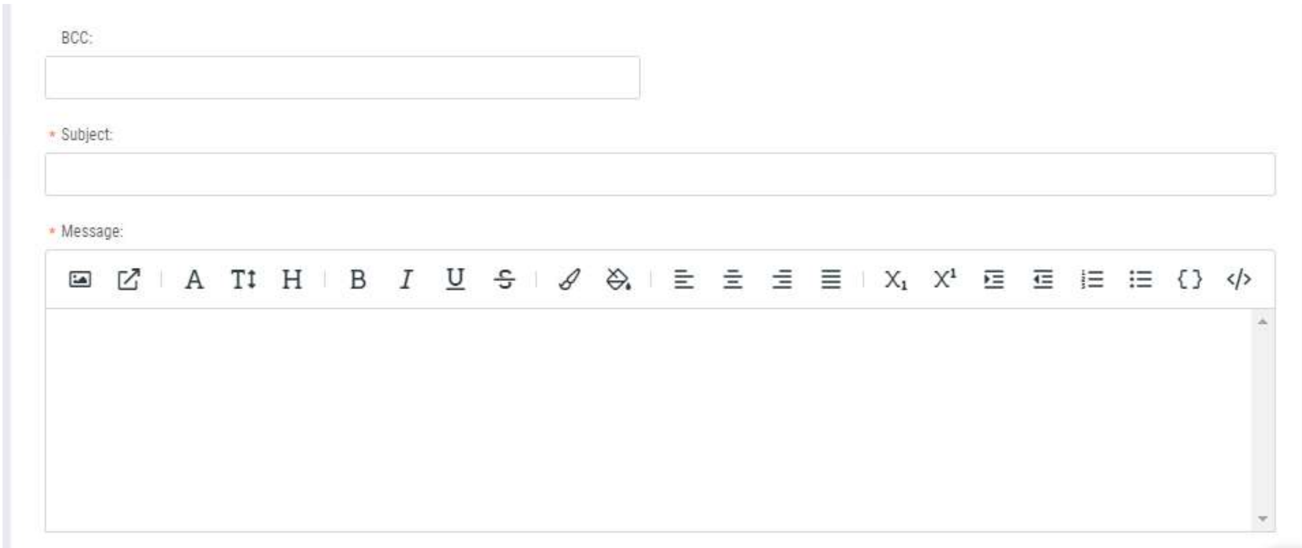


Agent: If this option is selected, the agent will be in charge of determining whether the finalization mail is sent.

Client: By contrast, if you select this option, the client will be the one in charge of determining whether they want the finalization mail.

The Web Designer form associated with the Web Chat channel must include a control for the user to indicate whether they are interested in receiving the finalization mail

7. Fill out the "*BCC*", "*Subject*" and "*Message*" fields as appropriate:



BCC: Put in this field the email addresses to which the outgoing mail will be copied, these addresses will be hidden from the recipient.

***Subject:** This field represents the subject of the email.

***Message:** To write the message you will be able to use all the usual tools of a text editor and also variables that will allow its customization.

8. After writing the message you must select the "*Outgoing Account*":

Click here to expand...

The outgoing account is the account from which the finalization mail *will be sent*.

All outgoing accounts configured in the campaign will be listed in the selection box.

9. Activate the option "*Include transcription*" so that a link is attached to the finalization mail through which the user can download their conversation with the agent.

10. Finally, you must click the "*SAVE*" button for the changes to be made.

Artículos Relacionados

- Paso 2: Instalación de inConcert OCC
- Cómo asociar una cuenta de Correo
- Cómo crear una Campaña
- Cómo crear una cuenta de Llamadas

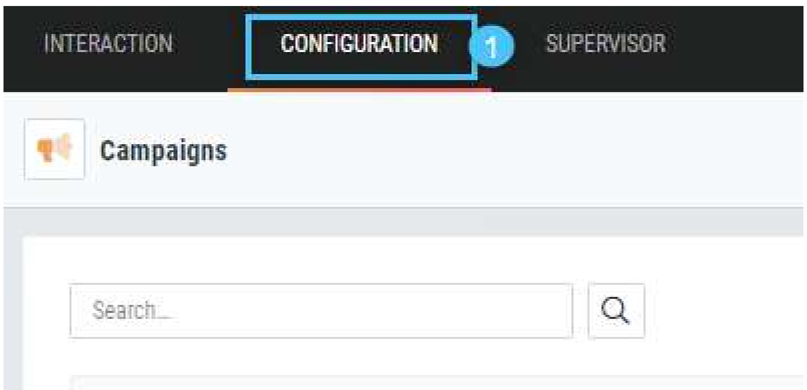
Cómo eliminar una Campaña

How to announce the agent assigned to a Web Chat interaction

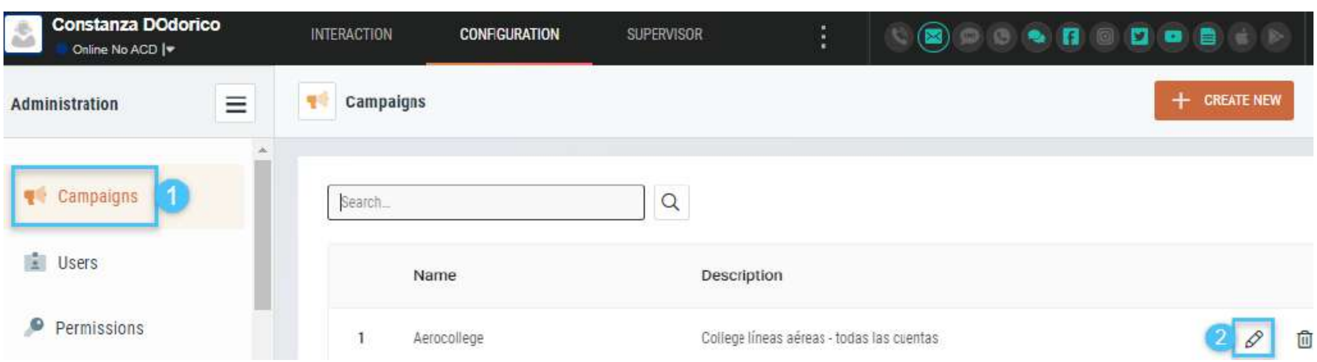
In inConcert Omnichannel, it is possible to define a message that, when starting a Web Chat conversation, indicates the name of the agent who has taken the interaction.

Follow these steps to define this message:

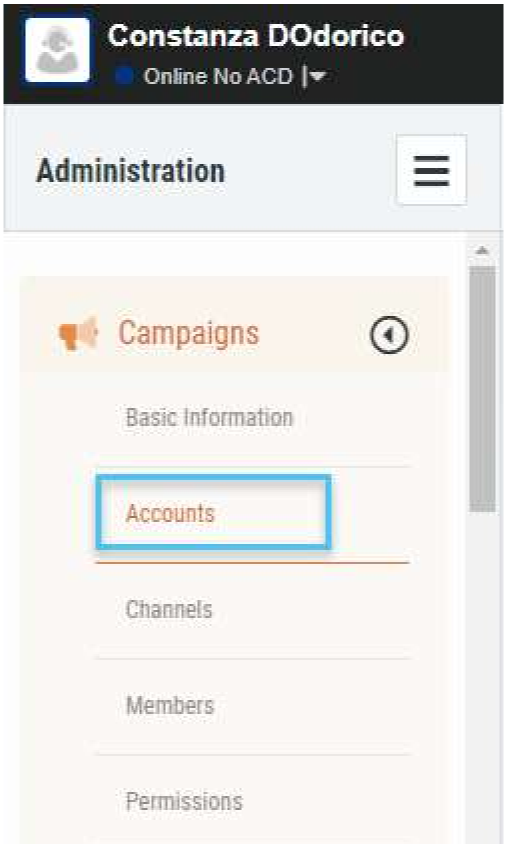
1. Go to the "*Configuration*" tab located at the top of the screen in the work environment in *OCC*.



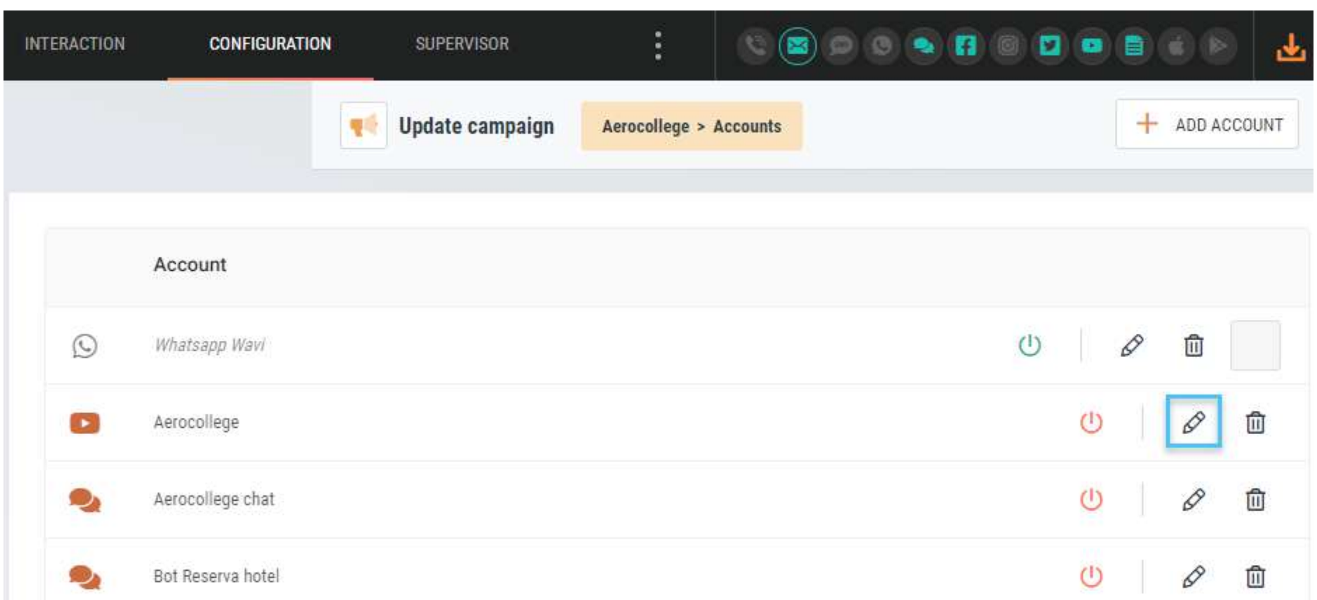
2. In the administration panel located on the left margin of the screen, click on the "*Campaigns*" tab  , then click the "*Edit*" button  associated with the campaign in which you want to define the message.



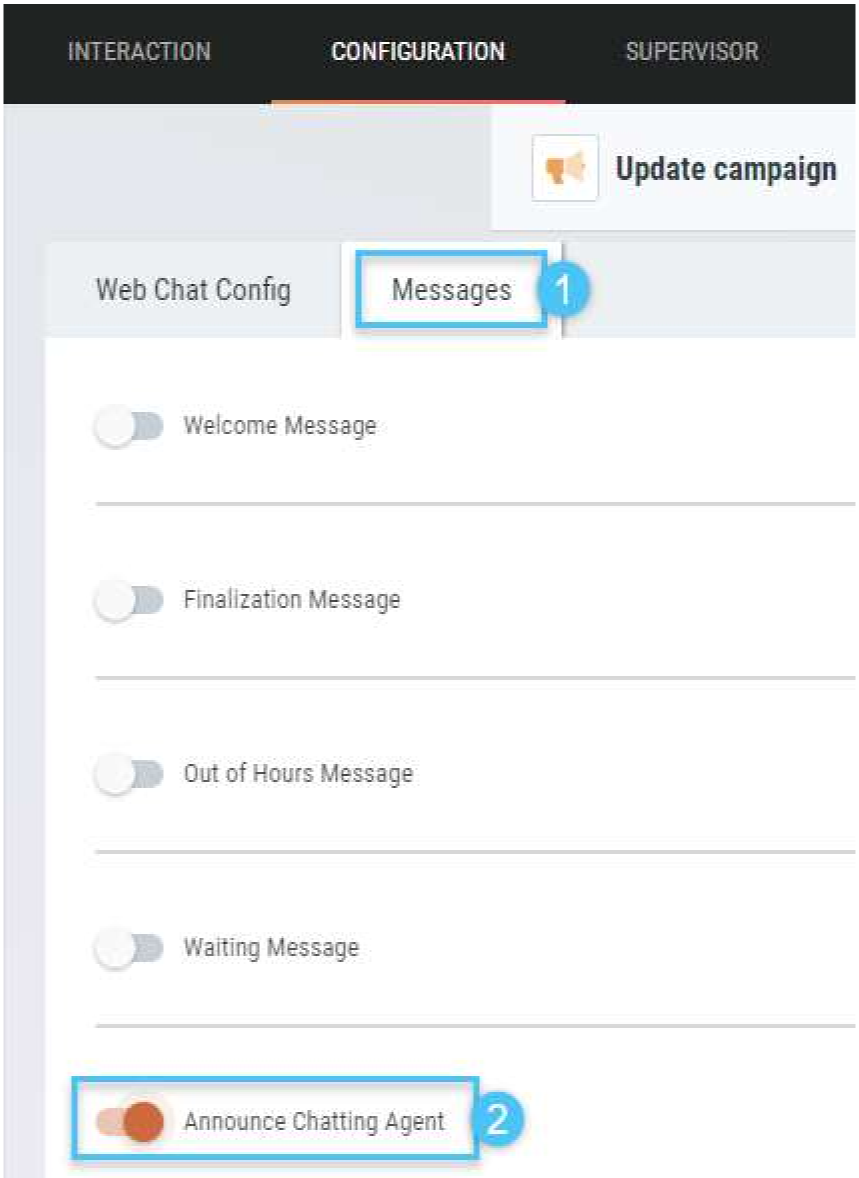
3. In the area on the left of your screen, a list of sections related to the administration of the campaign will be displayed, click on the "*Accounts*" section:



4. You will then see on the screen all the accounts associated with the campaign. Click the "*Edit*" button associated with the Web Chat account to which you want to assign the message:

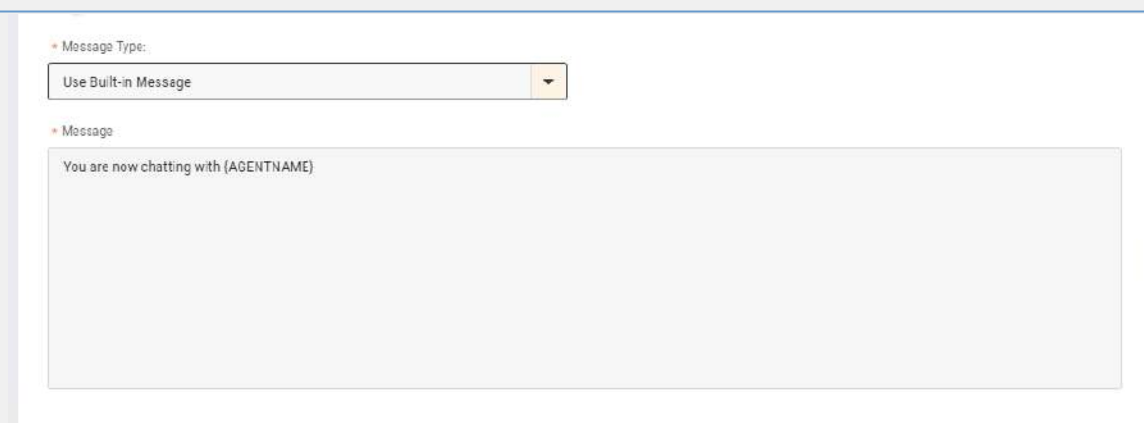


5. Then click on the "*Messages*" tab  and then click on the confirmation box "*Announce Agent Assigned*"  :



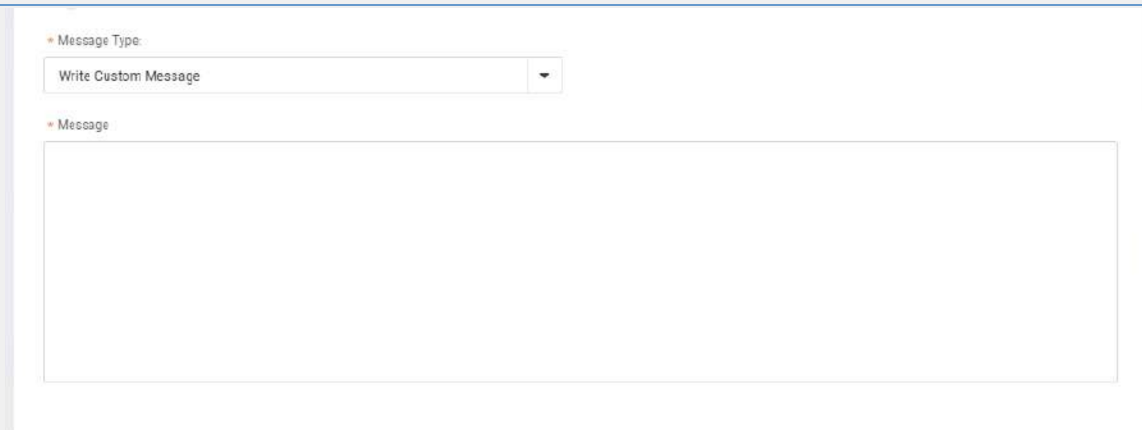
6. Then select the "*Type of Message*":

a. **Use predefined message**



If you select this option, the system will use a *predefined announcement message*. Where **{AGENT NAME}** is a variable to which the agent's first name will be assigned

b. **Write a custom message**



If you select this option, it will be possible for you to write a *custom announcement message*.

In this case it is crucial to make use of the variable **{AGENTNAME}** that will indicate the first name of the agent who has taken the interaction.

7. Finally, you must click the "*SAVE*" button to make the changes to the Web Chat account.

Related Articles

- User search
- How to set up Messenger messaging
- How to associate a YouTube account
- How to associate an application from Google Play Store
- How to associate an application from the App Store

WhatsApp channel configuration

- How to associate a WhatsApp account
- How to define an automatic finalization mail
- How to configure a WhatsApp API HSM
- How to configure automatic WhatsApp messages
- Wavy - Creation and Management of WhatsApp groups

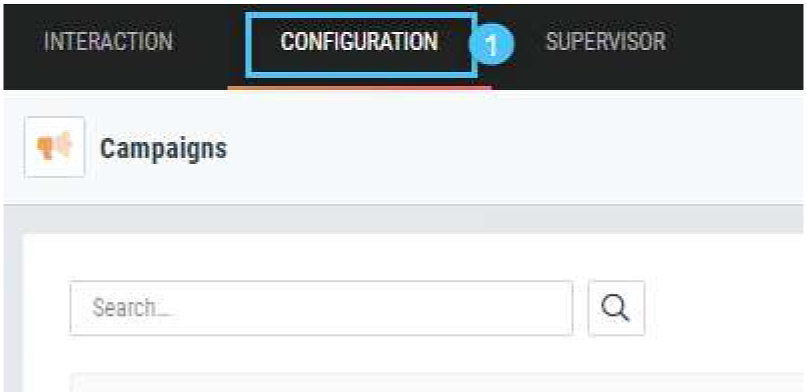
How to associate a WhatsApp account

Associating a WhatsApp account with a campaign allows you to manage all incoming or outgoing text messages about that account from OCC.

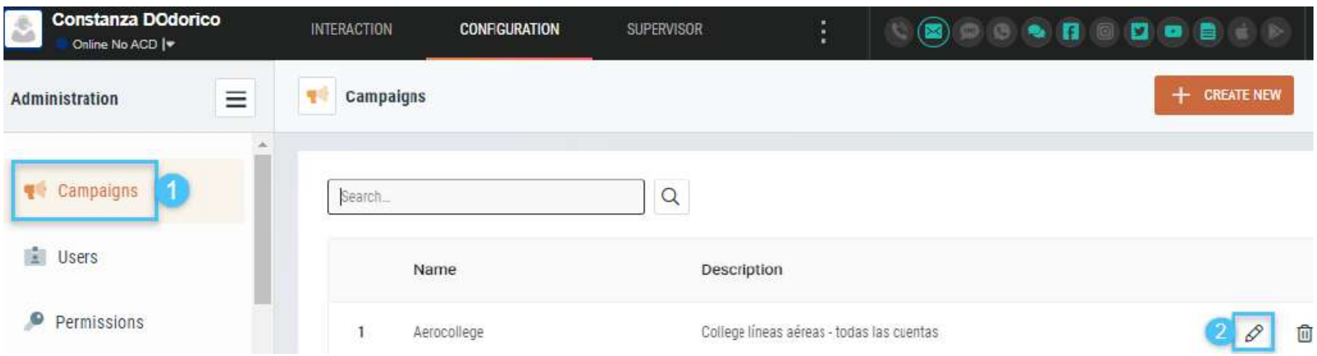
Several WhatsApp accounts can be associated with the same campaign, depending exclusively on the operation of the Contact Center.

To associate a WhatsApp account with a campaign:

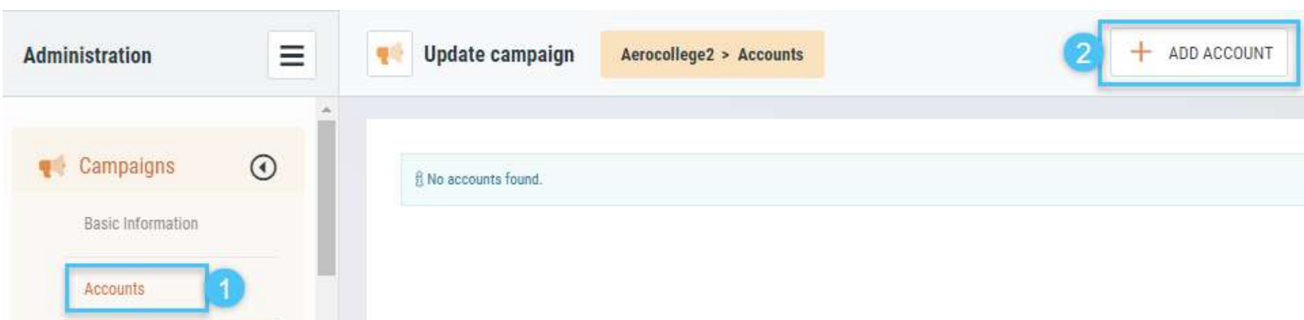
1. Go to the "Configuration" tab:



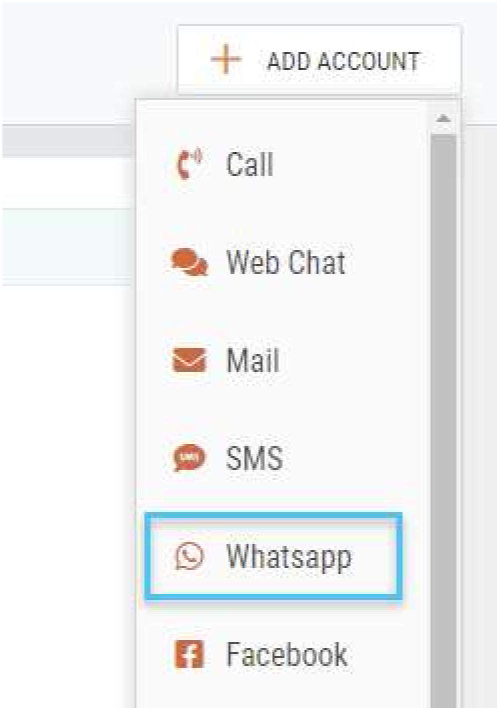
2. Click on the "Campaigns" section 1 and then click the "Edit" button of the campaign to which you will associate the account 2 :



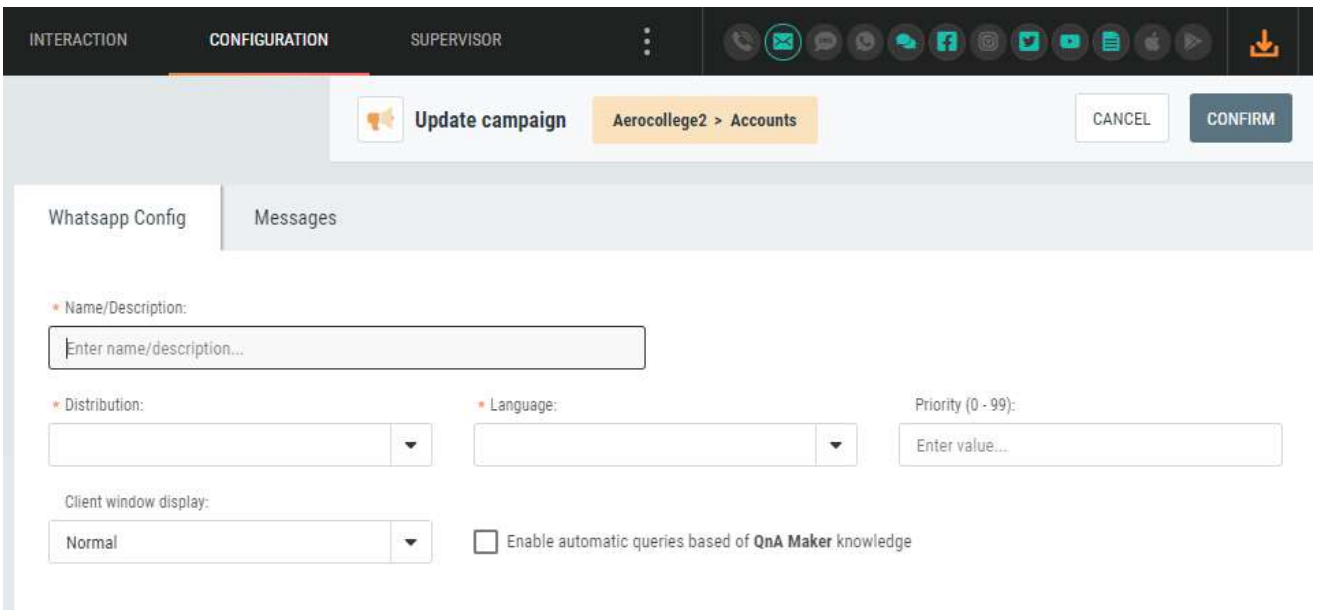
3. Click on the "Accounts" section of the Campaign 1 and then click the button "Add Acount" 2 :



4. Select the account type "WhatsApp":



5. The required data on the distribution of interactions and their main language must be specified.



Name/Description: Channel name.

Distribution: criteria by which the interactions that come from this account will be distributed to the operators.

Click here to expand...

Circular: assigns interactions to the operator who has been in the Available state for the longest time.

Queued: send new interactions to the campaign queue; to be taken or assigned manually.

Skill: the interactions will be assigned to the operators who have the highest ratings in terms of the skills required for each campaign; the "Circular" algorithm is applied to select between operators who receive the same skill score. If you select this, you must indicate the agent skills that you want to consider in the distribution

Priority: defines the priority of the interactions of this account with respect to the communications that come from others; the higher the number that is entered, the higher the priority.

Language: operators have a spell checker that is enabled when they are responding to an interaction. If the system cannot automatically identify the language of the interaction, it takes the one which has been set in this field.

Integration type:

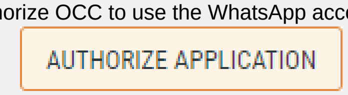
Click here to expand...

Web Drive:

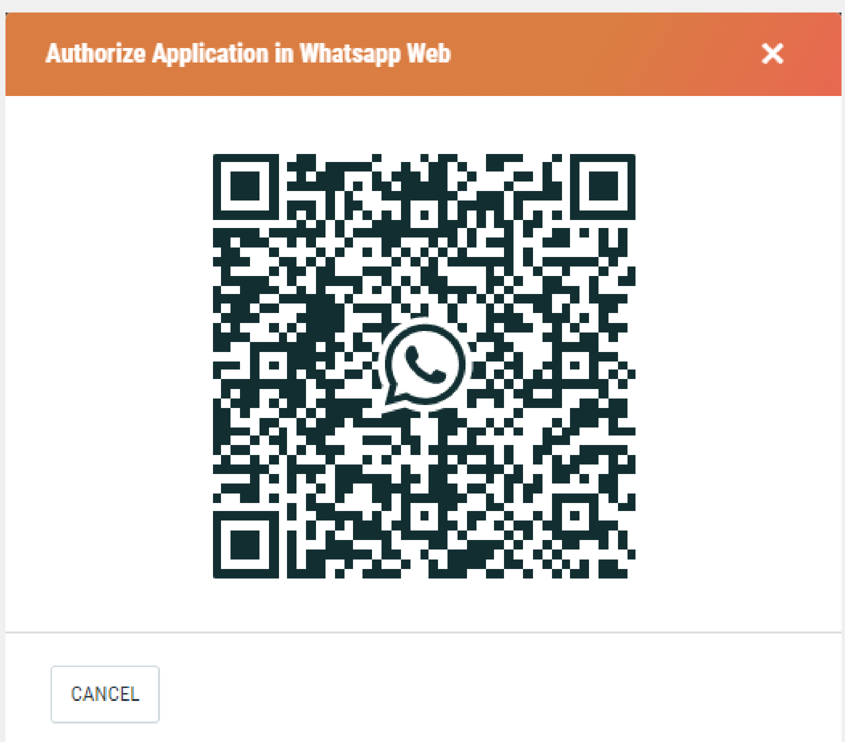
Select this option to implement the integration with the *inConcert* API, which will allow you to send and receive *WhatsApp* messages.

This API will allow you to execute all the actions available in WhatsApp Web except the following: *Send stickers and receive real-time location.*

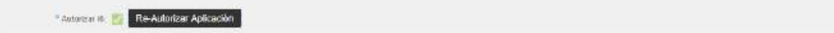
Authorize i6:

a. In this case, you must authorize OCC to use the WhatsApp account, do it by clicking the button 

b. In the window that will be displayed, scan the QR code with the device on which you use WhatsApp:



c. It will be shown with a "*check*" if the account was authorized correctly and the "Authorize Application" button changes to "Re-authorize Application", which must be clicked if you want to re-authenticate the account.



Send messages to new contacts: Allows you to send messages to contacts which are not registered. Keep in mind that the account could be marked as spam and be banned.

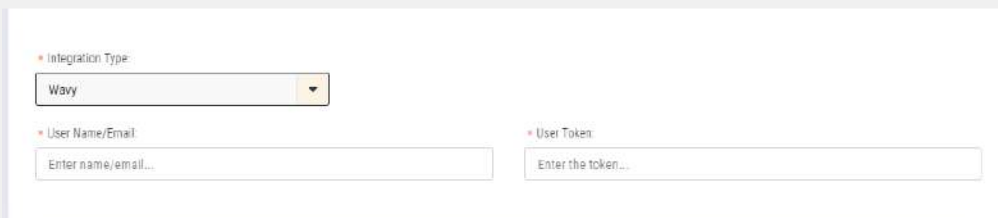
Sending messages in a burst could cause *Whats App* to lock the account.

Read the following article to learn how the WhatsApp-WebDriver integration Proxies work: How WhatsApp-WebDriver Proxies work.

Wavy:

Select this option to implement the integration with the Wavy API, which is an official WhatsApp API which will allow you to send and receive *WhatsApp* messages.

The API allows you to execute most of the actions available on *WhatsApp Web*, except for the following: *Send videos, send and receive stickers and receive real-time location.*



Username / Email: Name or valid email for user identification in *Chat Club*.

Note that this field is case sensitive, that is, it distinguishes between upper-case and lower-case letters.

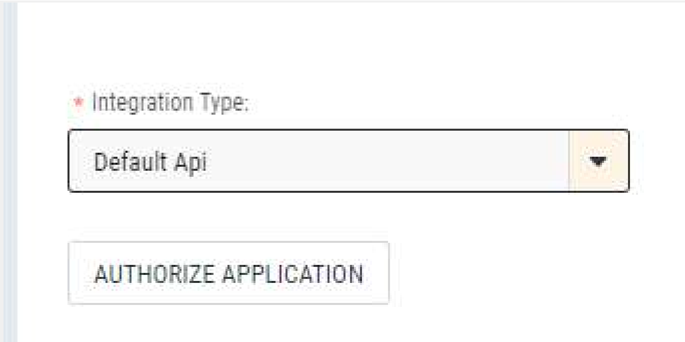
Token: Authentication token generated by the *Wavy* platform.

Read the following article to learn how the WhatsApp-Wavy integration Proxies work: How WhatsApp-Wavy Proxies work.

inConcert Whatsapp Business Api

Select this option to implement the integration with inConcert Whatsapp Business API, which will allow you to send and receive messages.

a. From "Integration Type", select the option "Default Api" and then click the button "Authorize Application"



b. A window will pop up, enter the required data.

Phone: telephone number associated with the WhatsApp Business account that you want to associate with the platform.

Available / unavailable functions

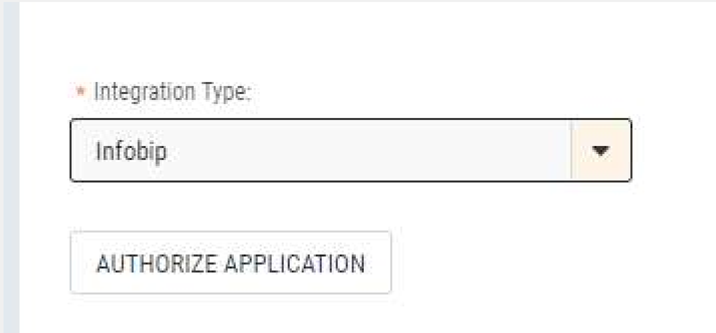
Available functions
• View name of the contact. • Incoming text messages, geolocation and attachments. • Outgoing text messages and attachments. • Outgoing messages to new contacts using HSM. • Status of outgoing messages.

Unavailable functions
• View the avatar of the contact. • Incoming sticker messages. • Send location in real time. • Sending and receiving contacts.

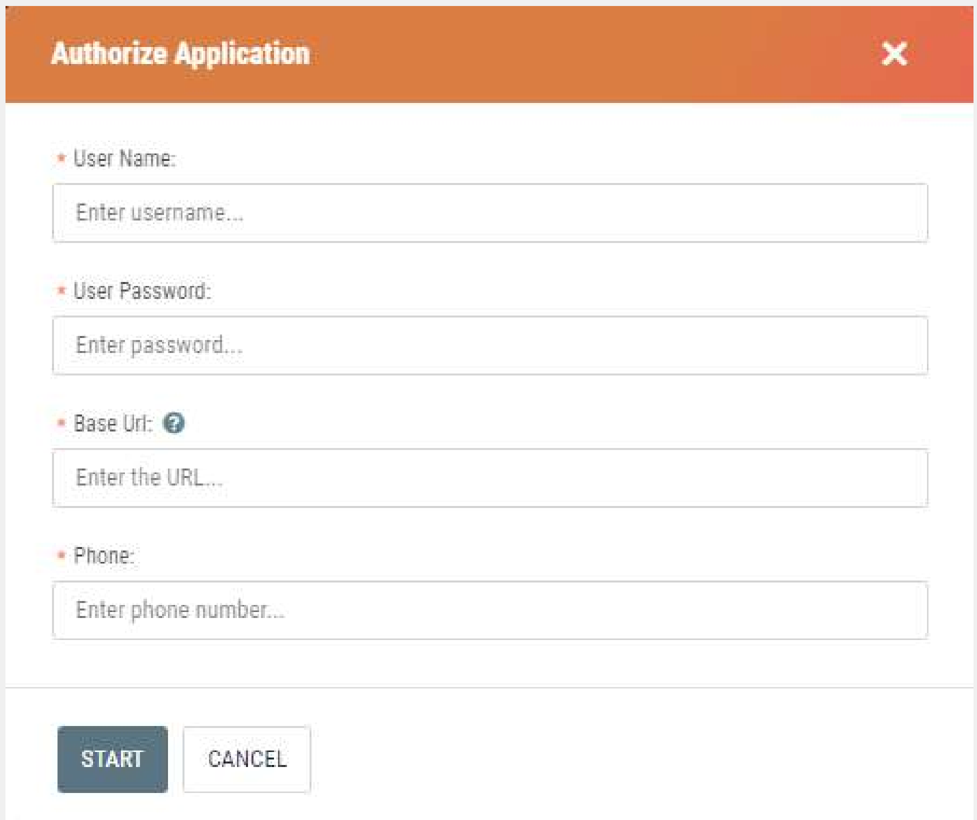
Read the following article to learn how the WhatsApp-ICWapi integration Proxies work: How WhatsApp-Smooch Proxies work.

Infobip:
Select this option to implement the integration with the official Infobip WhatsApp API which will allow you to send and receive messages.

a. From "*Integration Type*", select the option "Infobip" and then click the button "*Authorize Application*"



b. A window will pop up, enter the required data.



User Name: user corresponding to the Infobip account.

User Password: password corresponding to the Infobip account.

Base Url: url assigned by Infobip for the user

Info
Infobip does not have a fixed API URL but assigns a particular one for each user. This is obtained by entering https://dev.infobip.com/getting-started/base-url logged in with the corresponding user id.

Phone: telephone number associated with the WhatsApp Business account that you want to associate with the platform.

Available / unavailable functions

Funcionalidades disponibles

- View Contact Name.
- Incoming text messages, geolocation and attachments.
- Outgoing text messages and attachments.
- Outgoing messages to new contacts using HSM.
- Status of outgoing messages.

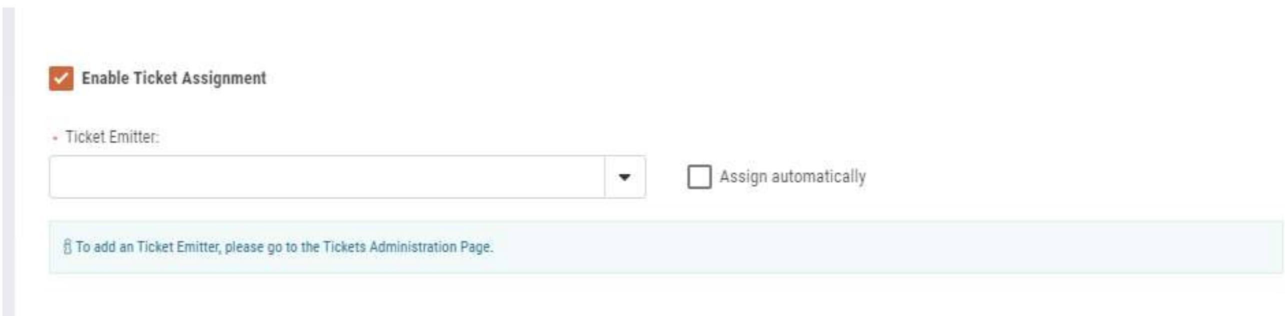
Unavailable functions

- View the avatar of the contact.
- View incoming sticker messages.
- Send location in real time.

Read the following article to learn how the WhatsApp-Infobip integration Proxies work: How WhatsApp-Infobip Proxies work.

6. **Attention Level:** You will be able to select from among the *Attention Levels* previously created, the one most appropriate for the operation of this account.

7. **Ticket manager:** You can enable *Tickets Management* to manually or automatically assign tickets to the interactions associated with this account, and you can also select a previously configured ticket issuer.



Assign tickets: if you check this box, you will be enabling the option to assign tickets to the interactions belonging to this account.

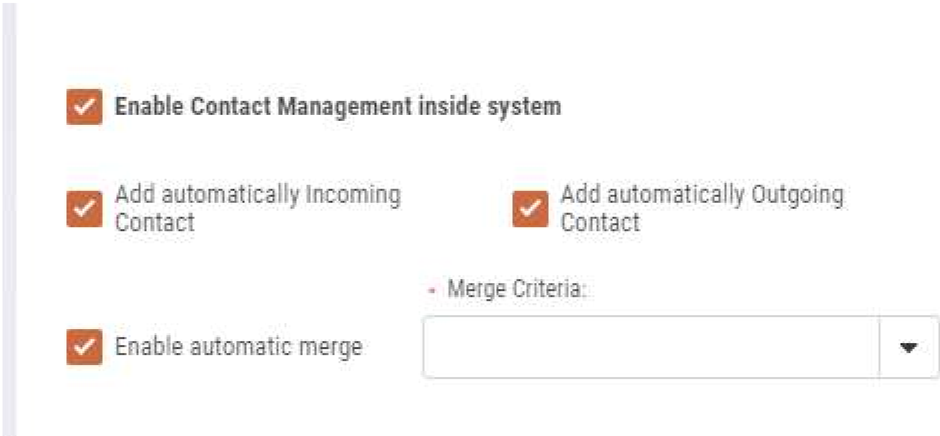
Automatic: if this box is checked, the tickets will be assigned automatically.

***Ticket issuer:**

Click here to expand...

You will need to select a previously configured ticket issuer, see How to create a ticket issuer.

8. **Contact management:**by enabling "Contact management" you will be able to create a new contact with each interaction, and if you wish, the system will do so automatically, both for inbound and outbound interactions. You can also define a criterion for saving the contact data:

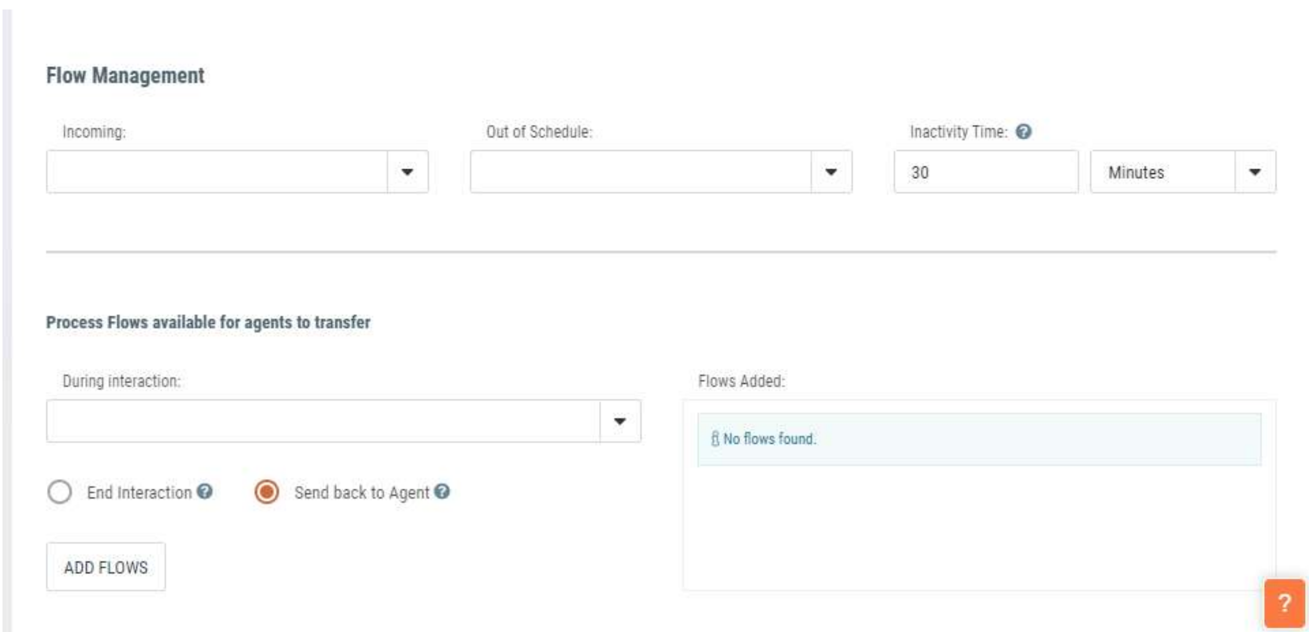


Contact management: if you check this box, you will be enabling the option to create a new contact with each interaction.

Auto Add Contact: if you check these boxes, the system will automatically create a new contact for each inbound and/or outbound interaction. *If it is not checked, contacts will be created manually.*

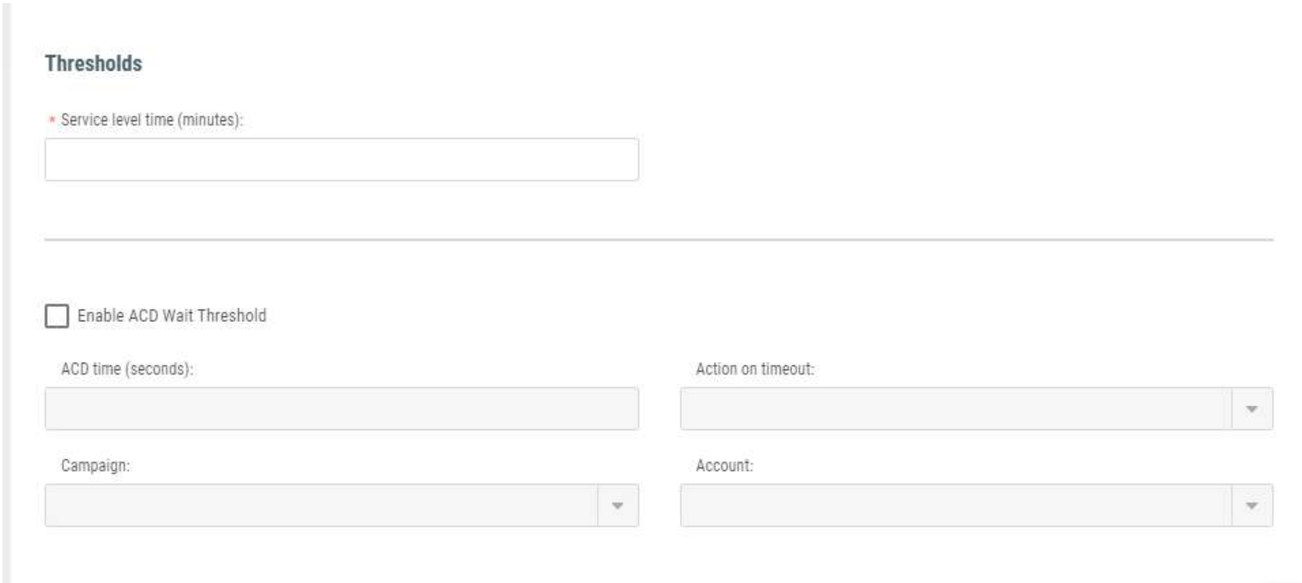
Automatic unification: after checking this box, you must define the criteria for saving the contact data. You can either keep the contact data already stored, or update the data in each new interaction.

9. **Flow management:** Allows you to assign an SMS automatic process to the account to automatically reply to messages from a flow.



10. **Thresholds:**

This information is not specific to the account but will be common to all accounts in the channel. Editing from here will only be possible if the account being defined is the first of its type, otherwise they will be read-only fields. To edit the channel thresholds, read: "How to edit the general channel settings".



> **Thresholds**: here you specify the time **thresholds** for different service and operational actions.
>
> **Service Level**: maximum answer time for the communication to be considered to have been attended within the desired Service Level.

11. After completing all the required fields, click the "SAVE ACCOUNT" button to continue.
12. To cancel the operation without saving the data entered, click the "CANCEL ACCOUNT" button

Related Articles

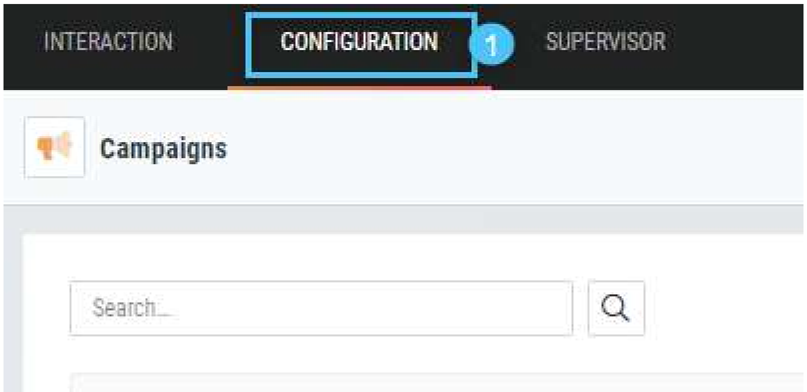
- User search
- How to set up Messenger messaging
- How to associate a YouTube account
- How to associate an application from Google Play Store
- How to associate an application from the App Store

How to define an automatic finalization mail

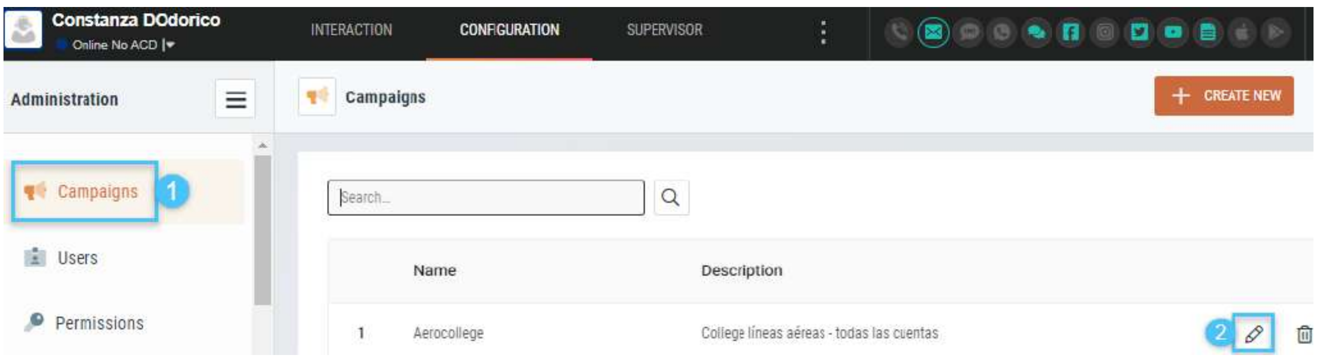
In InConcert Omnichannel, it is possible to configure an automatic finalization mail that runs when an interaction associated with an email account ends.

Follow these steps to configure an automatic finalization mail:

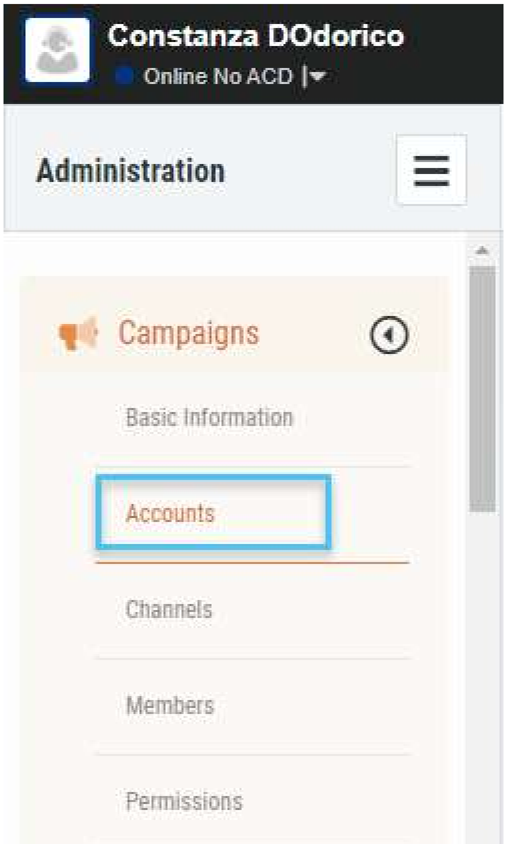
1. Go to the "*Configuration*" tab located at the top of the screen in the work environment in *OCC*.



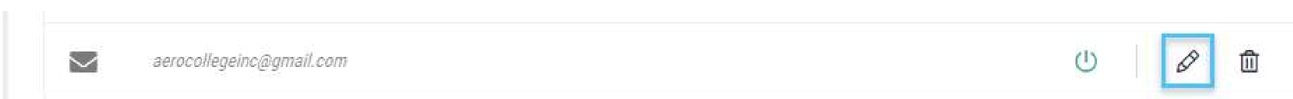
2. In the administration panel located on the left margin of the screen, click on the "*Campaigns*" tab , then click the "*Edit*" button associated with the campaign in which you want to define the finalization mail.



3. In the area on the left of your screen, a list of sections related to the administration of the campaign will be displayed, click on the "*Accounts* " section:



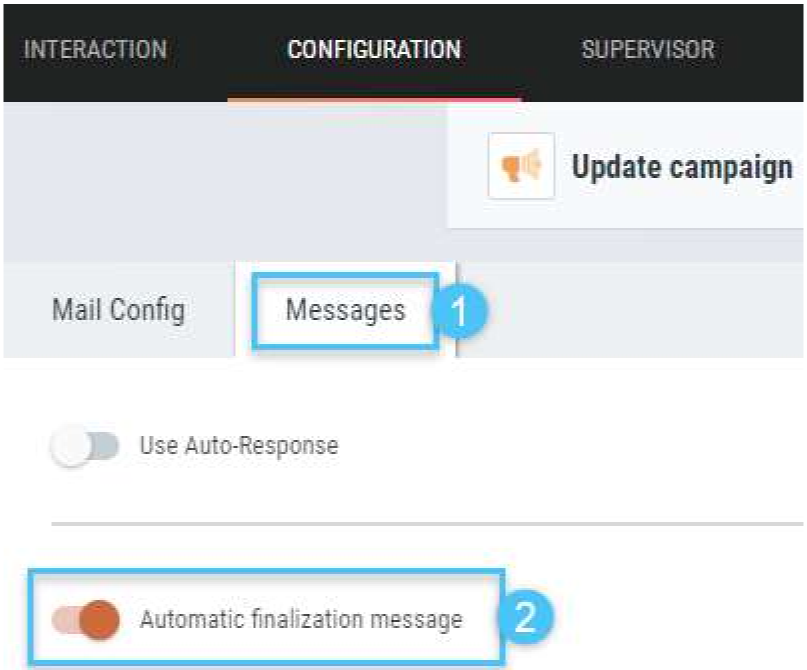
4. You will then see on the screen all the accounts associated with the campaign. Click the "*Edit*" button associated with the email account to which you want to activate the email:



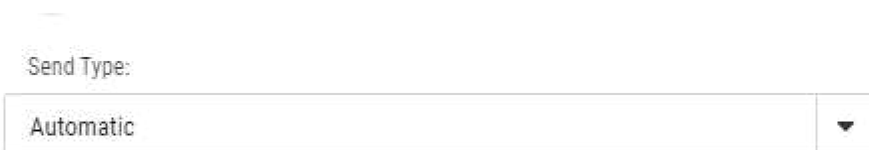
5. Then click on the "*Messages*" tab 

and then click the confirmation box "*Automatic Finalization Message*" 

:



6. Then select the "Send Type":

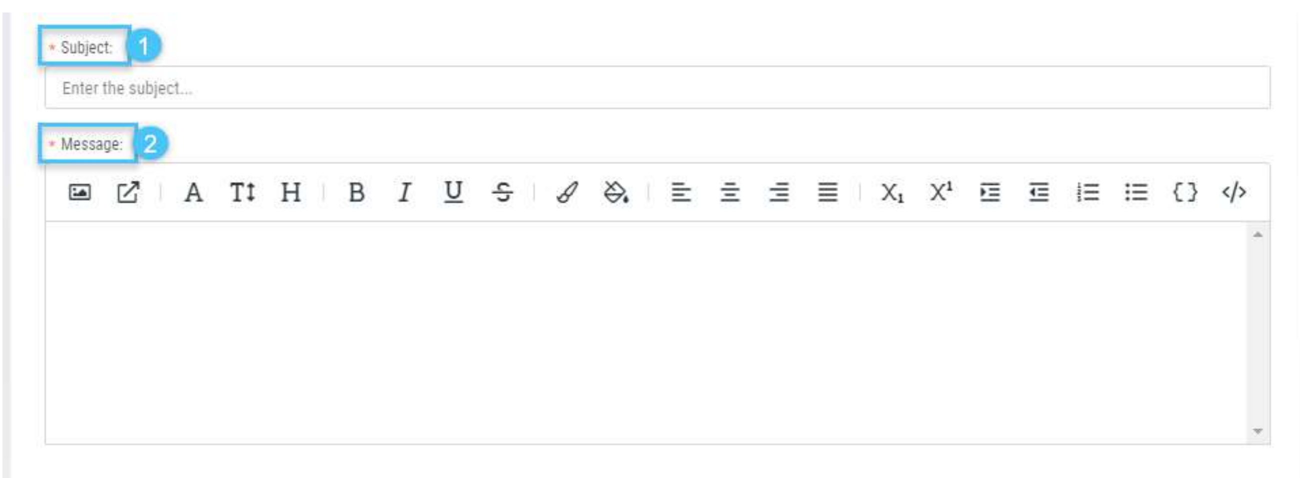


Click here to expand...

Automatic: If this Send Type is selected, the finalization mail will be sent right after any interaction associated with the mail account is finished.

Automatic by Disposition: If this Send Type is selected, the finalization mail will be sent only in cases where the interaction is assigned to a *disposition code with final status*.

7. Then it will be possible to define the "*Subject*" 1 and the "*Message*" 2 of the automatic mail.



When composing the message, you can also use the text editing tools and the Variables available.

8. Finally, click the "*SAVE*" button to save the changes made to the account.

Related Articles

- User search
- How to set up Messenger messaging
- How to associate a YouTube account
- How to associate an application from Google Play Store
- How to associate an application from the App Store

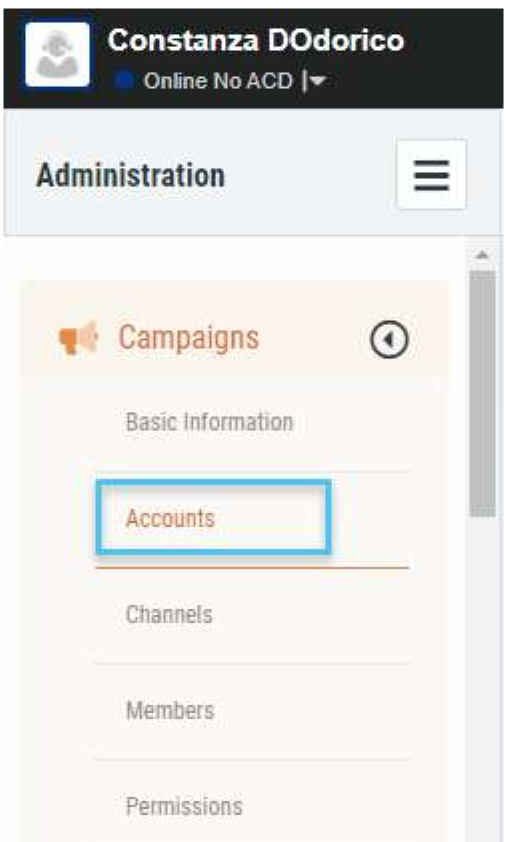
How to configure a WhatsApp API HSM

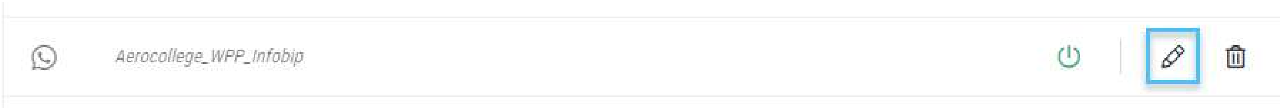
WhatsApp HSMs are predefined templates that allow the proactive sending of messages and respond to threads with more than 24 hours.

Multiple templates can be created in different languages for the same account.

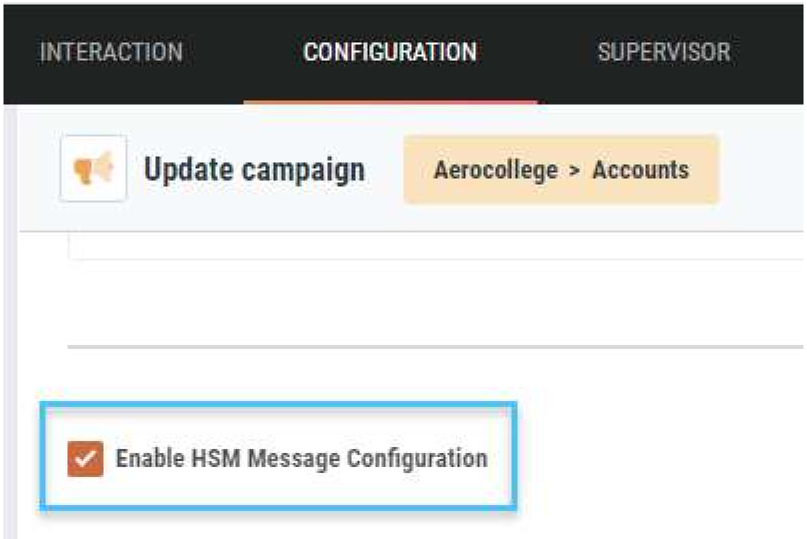
To create an HSM:

1. Enter the WhatsApp API account configured within the campaign:



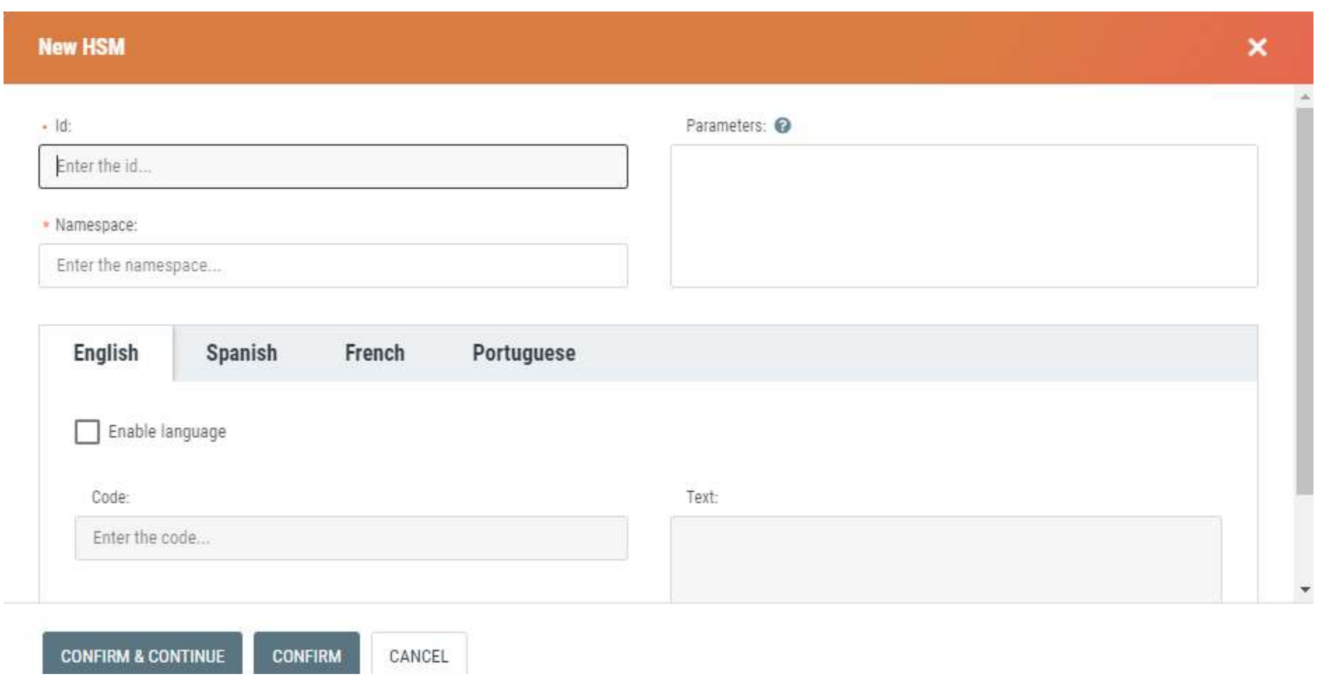


2. Enable the HSM configuration, from the checkbox:



3. To create the template, click on New HSM:

4. Configure the HSM:



ID: template name. It must not contain spaces or special characters. You may also know it as "Template".

Namespace: enter the namespace indicated by the provider.

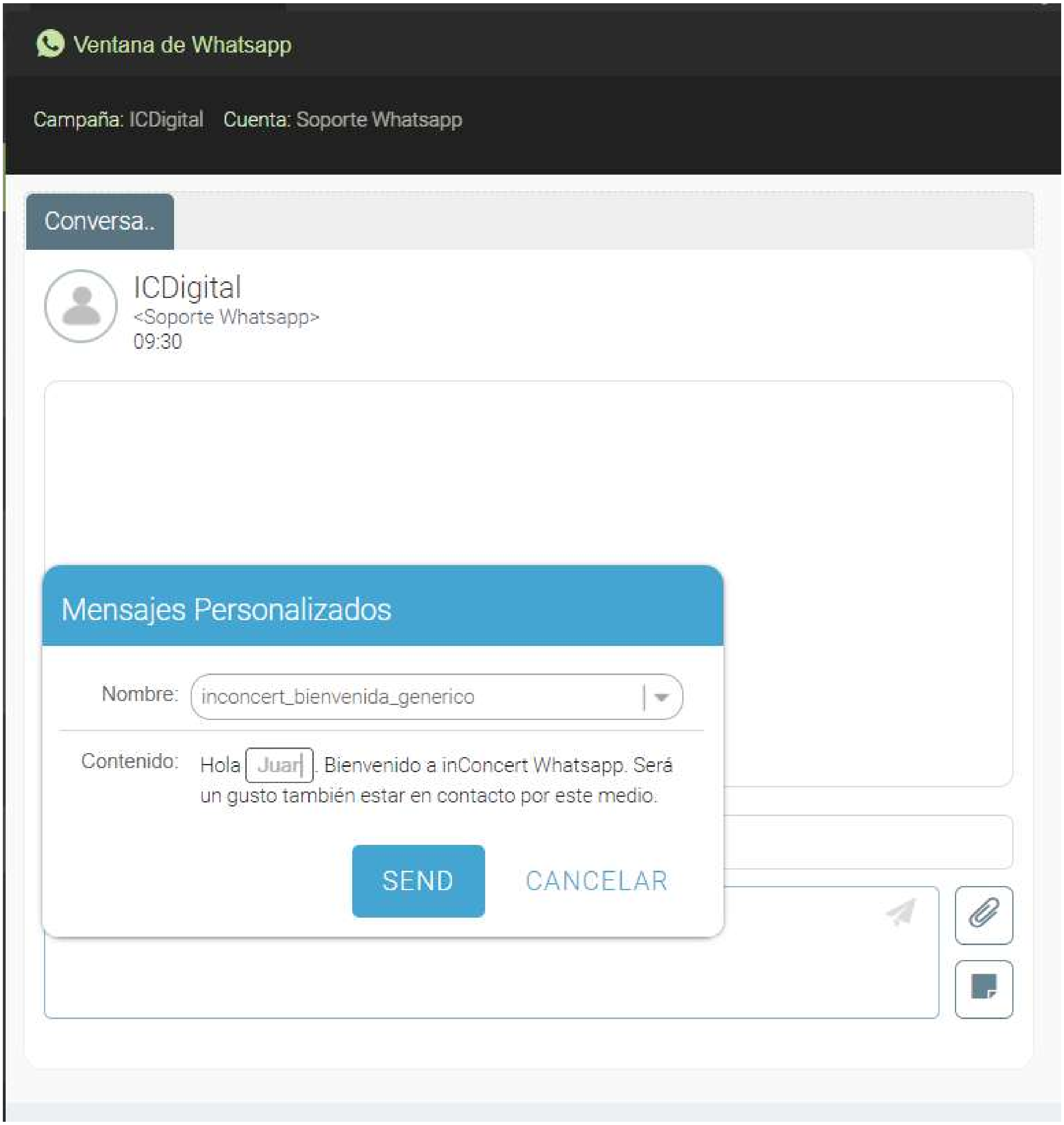
Language: Enable text language.

Text: Write the text indicating the parameters (variables) listed between double curly brackets. The text must be the same as that defined in the Official WhatsApp account.

Parameters: Name of the variable which will be used to complete the corresponding parameter in the text.

5. After completing all the required fields, click the "Update" button to continue with the configuration of the WhatsApp account.
6. To close without saving the entered data, click the "Cancel" button.

7. Test sending from an interaction.



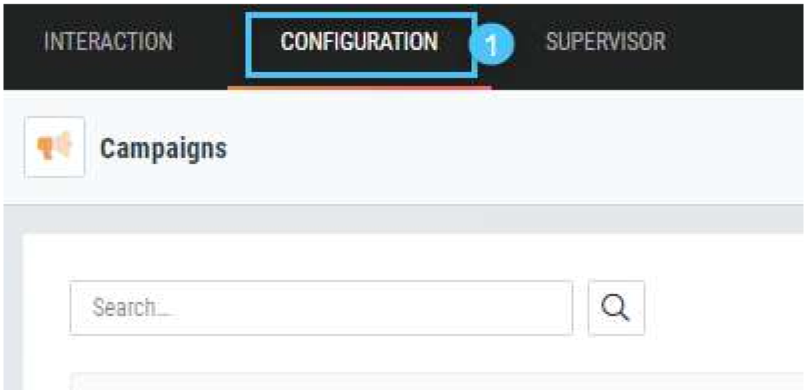
Related Articles

- User search
- How to set up Messenger messaging
- How to associate a YouTube account
- How to associate an application from Google Play Store
- How to associate an application from the App Store

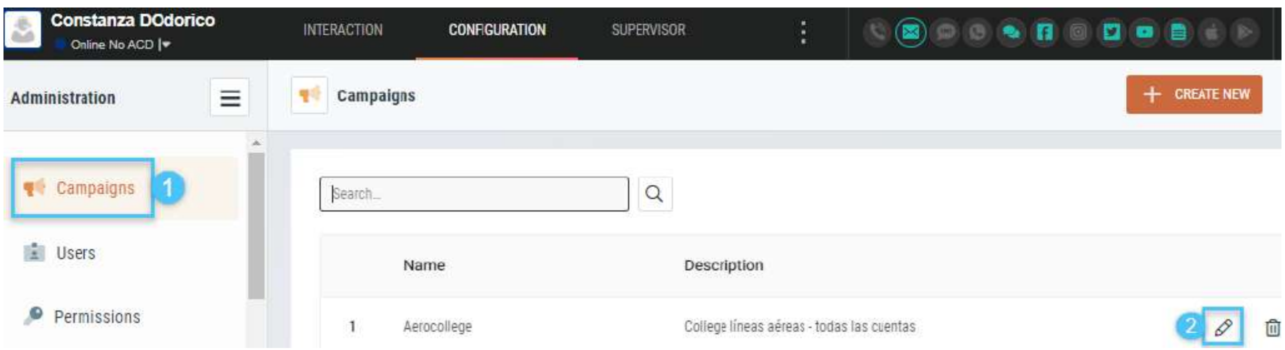
How to configure automatic WhatsApp messages

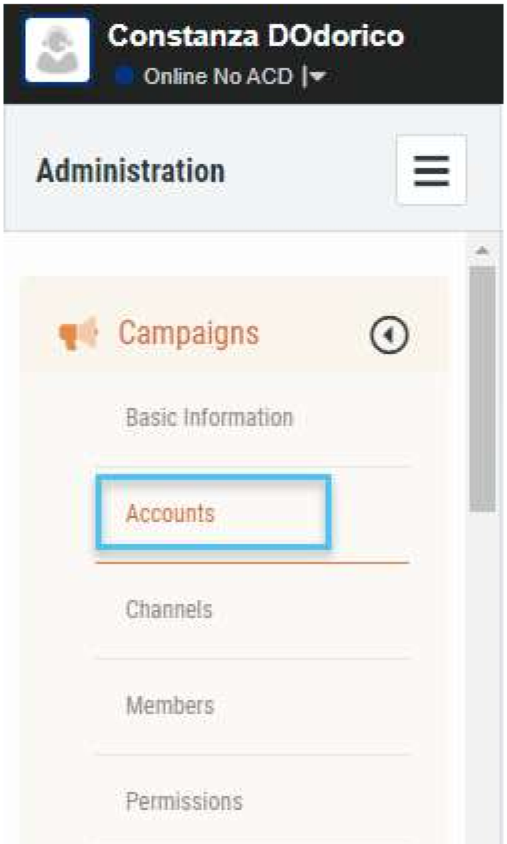
It is possible to configure automatic reply messages for the WhatsApp channel. To do this:

a. Go to the Configuration section:

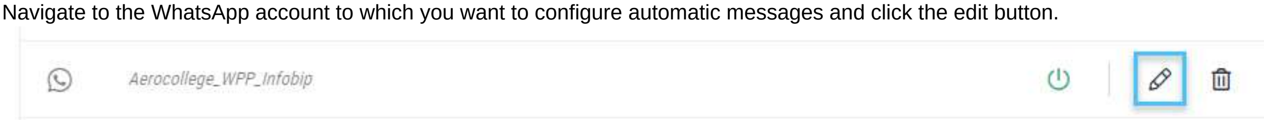


b. In the administration menu, go to the "Campaigns" section  and then click on "Accounts"  .

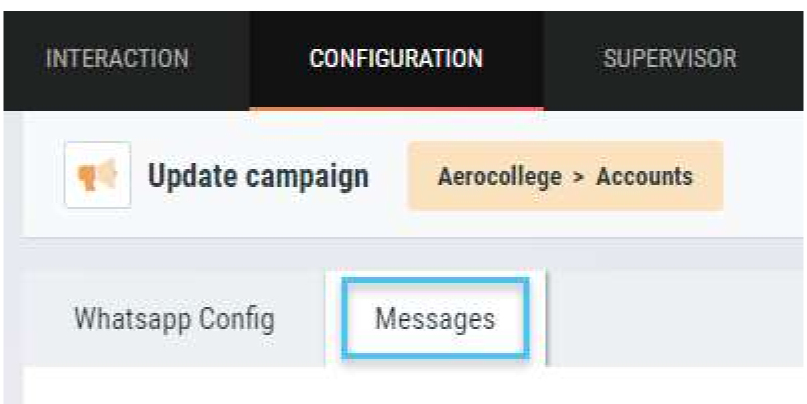




c. Navigate to the WhatsApp account to which you want to configure automatic messages and click the edit button.

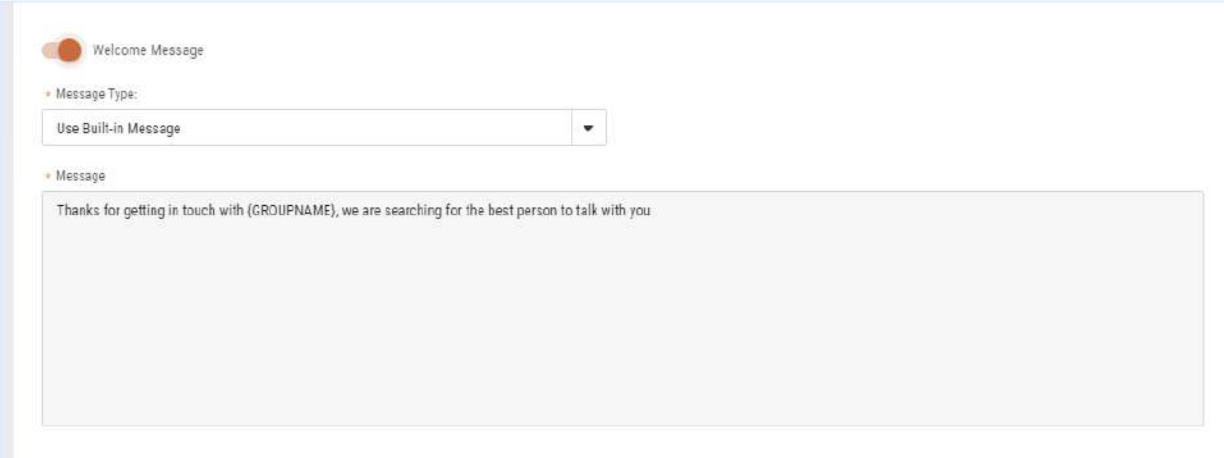


d. Once in the account, navigate to the "MESSAGES" tab.



1. Select what type of message you want to configure and then click "SAVE"  .

Welcome Message



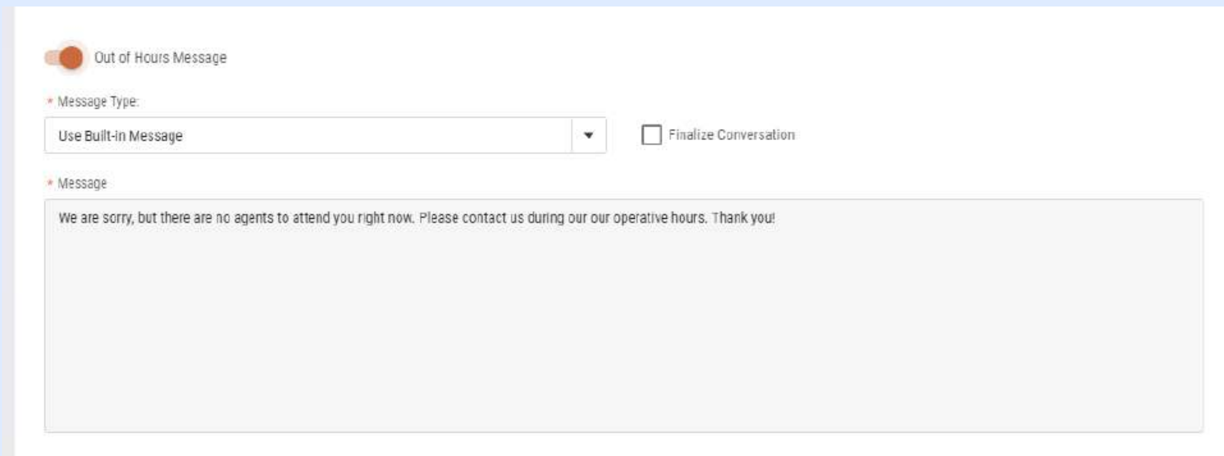
Type of Message: identify what message you want to send.

Type of available messages

Custom message

Predefined message (must be previously configured)

Out of hours message



Type of Message: identify what message you want to send.

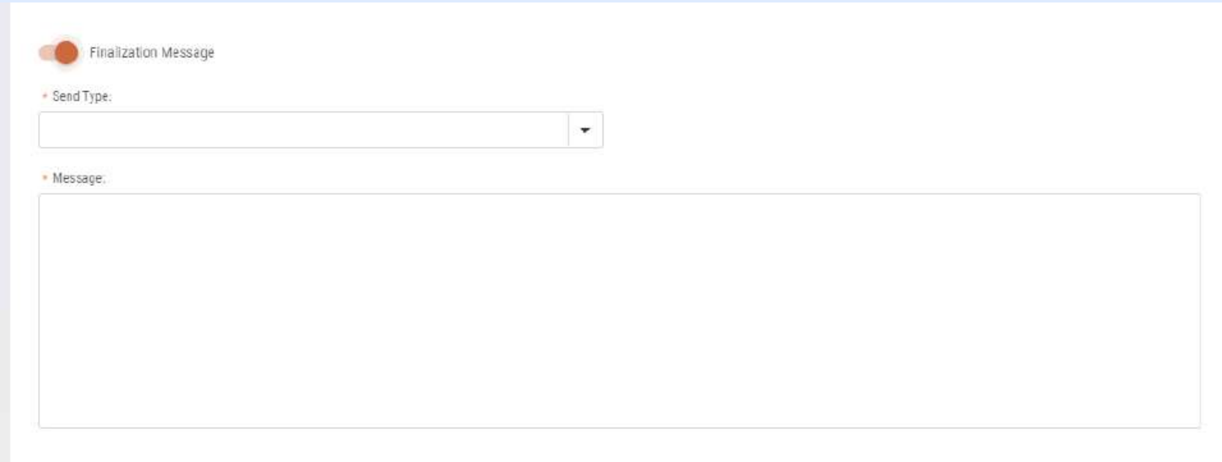
Type of available messages

Custom message

Predefined message (must be previously configured)

Finish interaction: select whether you want to end the interaction when the automatic answer has been sent.

Mensaje de finalización

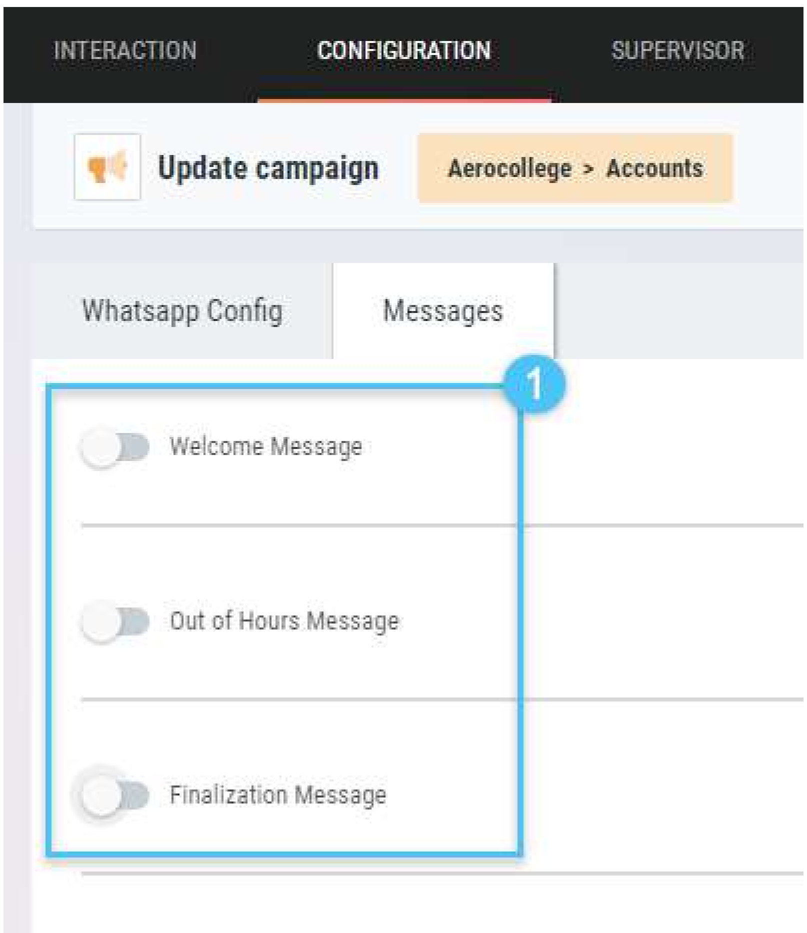


Send Type: you must establish when the send will be executed.

Tipo de envíos disponibles

Automatic (at the end of the interaction)

By result (runs when there is a given interaction result)



Related Articles

- User search
- How to set up Messenger messaging
- How to associate a YouTube account
- How to associate an application from Google Play Store
- How to associate an application from the App Store

Wavy - Creation and Management of WhatsApp groups

- How to create a WhatsApp Group (Wavy Integration)
- How to generate an invitation link to a WhatsApp Group (Wavy Integration)
- How to update the subject of a WhatsApp Group (Wavy Integration)
- How to grant / revoke permissions for a participant in a WhatsApp Group (Wavy integration)
- How to delete participants from a WhatsApp Group (Wavy integration)
- How to leave a WhatsApp Group (Wavy Integration)

How to create a WhatsApp Group (Wavy Integration)

InConcert OmniChannel allows the management of WhatsApp Groups associated with an account. This article will describe the process of creating one.

This account must use the API integration provided by Wavy, for more information read: How to associate a WhatsApp account.

Follow these steps to create a group:

1. Go to the "*Configuration*" tab located at the top of the screen in the work environment in *OCC*.

2. In the administration panel located on the left margin of the screen, click on the "*Campaigns*" tab 1, then click the button "*Edit*" 2 associated with the campaign in which the account is located in which you want to create the Group.

3. A list of sections related to the administration of the campaign will be displayed, click on the "*Accounts*" section 1, find the WhatsApp account to which you want to add groups and then click the button "*Edit*" 2 associated with it.

4. A window will be displayed where you will see the groups created. To create a new one, just click the "*NEW*" button located in the upper right corner of the work environment.

5. After determining the "*subject*" of the Group, you can click the button "*CREATE*" to create the group.

On creating a Group, a numeric ID will be generated automatically that will identify it.

Artículos Relacionados

- Proceso de Migración WhatsApp
- Paso 2: Instalación de inConcert OCC
- Whatsapp Proxies
- Error iniciando el proceso de autorización
- Cómo asociar una cuenta de Correo

How to generate an invitation link to a WhatsApp Group (Wavy Integration)

InConcert OmniChannel allows you to invite participants to a *WhatsApp* group using an *invitation link* automatically generated by the application.

To make use of this functionality it is necessary to *manage a WhatsApp group*.

This account must use the API integration provided by Wavy, for more information read: How to associate a WhatsApp account.

Follow these steps to generate the invitation link::

1. Go to the "*Configuration*" tab located at the top of the screen in the work environment in *OCC*.

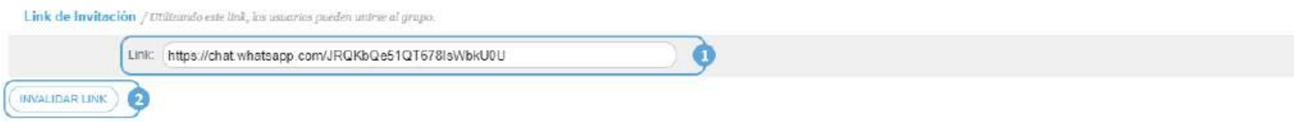
2. In the administration panel located on the left margin of the screen, click on the "*Campaigns*" tab , then click the button "*Edit*" associated with the campaign the Group is in.

3. A list of sections related to the administration of the campaign will be displayed, click on the "*Accounts*" section , find the WhatsApp account to which you want to add groups and then click the button "*Edit*" associated with it.

4. A window will be displayed where you will see the groups created. To generate an invitation link, click the "*Edit*" button associated with the group for which the link will be created.

5. At the bottom of the window you will see the button "*GENERATE LINK*". Click it to generate the invitation link.

6. *Sends the link generated* to the participants you want to invite to the group. Also, the button "*GENERATE LINK*" changes to "*CANCEL LINK"* ,*click it to cancel the group invite link*.



Artículos Relacionados

- Proceso de Migración WhatsApp
- Paso 2: Instalación de inConcert OCC
- Whatsapp Proxies
- Error iniciando el proceso de autorización
- Cómo asociar una cuenta de Correo

How to update the subject of a WhatsApp Group (Wavy Integration)

InConcert OmniChannel allows you to update the subject of a previously created WhatsApp Group.

This account must use the API integration provided by Wavy, for more information read: How to associate a WhatsApp account.

Follow these steps to update the subject of a WhatsApp group:

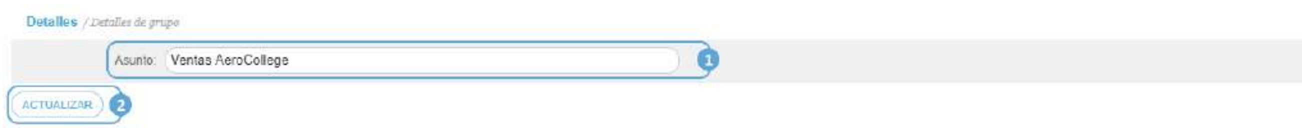
1. Go to the "*Configuration*" tab located at the top of the screen in the work environment in *OCC*.

2. In the administration panel located on the left margin of the screen, click on the "*Campaigns*" tab ,then click the button "*Edit*" associated with the campaign to which the Group is associated.

3. A list of sections related to the administration of the campaign will be displayed, click on the "*Accounts*" section ,find the WhatsApp account to which you want to add groups and then click the button "*Edit*" associated with it.

4. A window will be displayed where you will see the groups created. To generate an invitation link, click the "*Edit*" button associated with the group for which the link will be created.

5. At the top of the window you will see the details section, write the new *Group subjec* and then click the "*UPDATE*" button .



Updating the group subject will *not* change the invitation link

Artículos Relacionados

- Proceso de Migración WhatsApp
- Paso 2: Instalación de inConcert OCC
- Whatsapp Proxies
- Error iniciando el proceso de autorización
- Cómo asociar una cuenta de Correo

How to grant / revoke permissions for a participant in a WhatsApp Group (Wavy integration)

From the inConcert Omnichannel platform you will be able to grant or revoke administrator permissions to the participants of your *WhatsApp Groups*.

To make use of this functionality it is necessary to *manage a WhatsApp group*.

This account must use the API integration provided by Wavy, for more information read: How to associate a WhatsApp account.

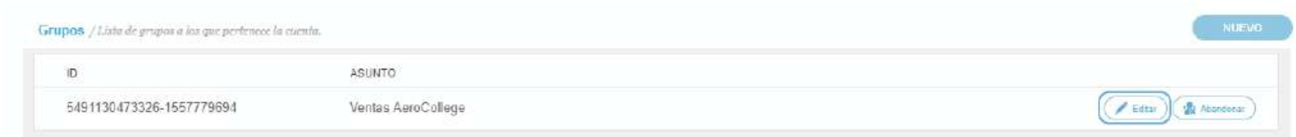
Follow these steps to learn how to manage the participants of a group:

1. Go to the "*Configuration*" tab located at the top of the screen in the work environment in *OCC*.

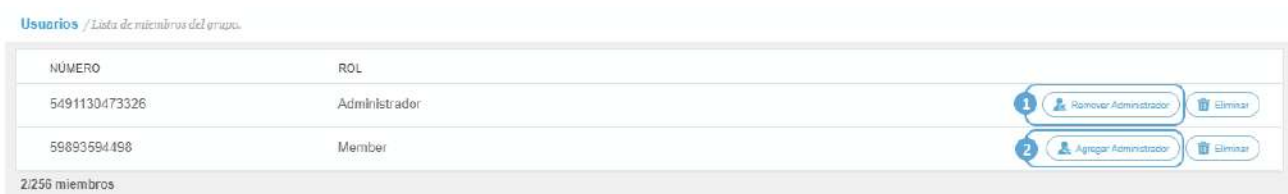
2. In the administration panel located on the left margin of the screen, click on the "*Campaigns*" tab , then, click the "*Edit*" button associated with the campaign in which you want to manage the permissions of the participants.

3. A list of sections related to the administration of the campaign will be displayed, click on the "*Accounts*" section , find the WhatsApp account and then click the button "*Edit*" associated with it.

4. A window will appear where you will see the groups created. Click the "*Edit*" button associated with the group for which you want to manage users.



5. Approximately in the center of the pop up window you will see the Users section where all the participants of the group will be listed. To grant or revoke administrator permissions for a participant, just click the "*Add Administrator*" button or "*Remove Administrator*" respectively.



It is not possible to remove the administrator permissions from the user who created the group.

Artículos Relacionados

- Proceso de Migración WhatsApp
- Paso 2: Instalación de inConcert OCC
- Whatsapp Proxies
- Error iniciando el proceso de autorización
- Cómo asociar una cuenta de Correo

How to delete participants from a WhatsApp Group (Wavy integration)

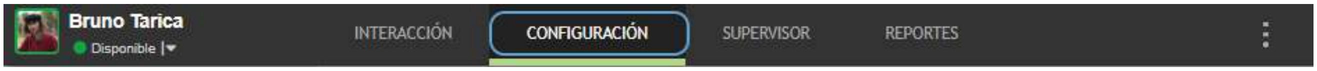
From the inConcert Omnichannel platform you can delete participants from your *WhatsApp Groups.*

To make use of this functionality it is necessary to *manage a WhatsApp group*.

This account must use the API integration provided by Wavy, for more information read: How to associate a WhatsApp account.

Follow these steps to learn how to manage the participants of a group:

1. Go to the "*Configuration*" tab located at the top of the screen in the work environment in *OCC*.



2. In the administration panel located on the left margin of the screen, click on the "*Campaigns*" tab , then click the button "*Edit*" associated with the campaign in which you want to manage the permissions of the participants.

3. A list of sections related to the administration of the campaign will be displayed, click on the "*Accounts*" section , find the WhatsApp account and then click the button "*Edit*" associated with it.

4. A window will appear where you will see the groups created. Click the "*Edit*" button associated with the group for which you want to manage users.

5. Approximately in the center of the pop up window you will see the Users section where all the participants of the group will be listed. To delete a participant from the group, click the "Delete" button associated with the participant you wish to delete.

It is not possible to delete the user who created the group.

Artículos Relacionados

- Proceso de Migración WhatsApp
- Paso 2: Instalación de inConcert OCC
- Whatsapp Proxies
- Error iniciando el proceso de autorización
- Cómo asociar una cuenta de Correo

How to leave a WhatsApp Group (Wavy Integration)

From the inConcert Omnichannel platform you can leave any of your *WhatsApp Groups*.

To make use of this functionality it is necessary to *manage a WhatsApp group*

This account must use the API integration provided by Wavy, for more information read: How to associate a WhatsApp account.

Follow these steps to leave a group:

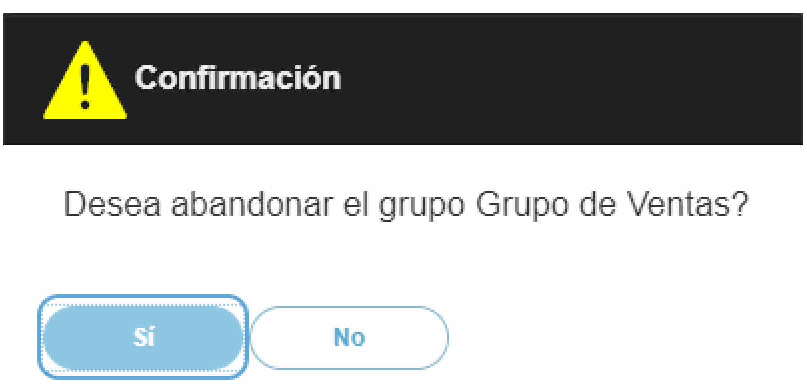
1. Go to the "*Configuration*" tab located at the top of the screen in the work environment in *OCC*..

2. In the administration panel located on the left margin of the screen, click on the "*Campaigns*" tab 1, then click the button "*Edit*" 2 associated with the campaign in which you want to manage the permissions of the participants.

3. A list of sections related to the administration of the campaign will be displayed, click on the "*Accounts*" section 1, find the WhatsApp account and then click the button "*Edit*" 2 associated with it.

4. A window will appear where you will see the groups created. Click the "*Leave*" button associated with the group you wish to leave.

5. A confirmation window will be displayed. Click the "*YES*" button to leave the group.



Artículos Relacionados

- Proceso de Migración WhatsApp
- Paso 2: Instalación de inConcert OCC
- Whatsapp Proxies
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- Cómo asociar una cuenta de Correo

Email Configuration

- How to associate a Mail account
- How to configure auto-reply in an email account

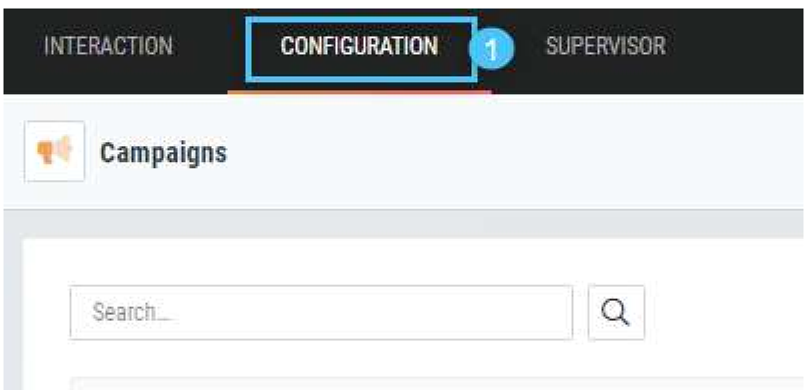
How to associate a Mail account

Associating a mail account to a campaign, will allow to manage mail interactions, which will consist in sequences of mail exchanges between users. Such interactions can be handled depending on the Attention Levels set up, as well as converting each mail interaction into a Ticket. If the user involved in the interaction is not a contact yet, it can be added automatically through the Contact Management feature. After the mail interaction has been finished, you can launch a survey for the contacts to provide feedback.

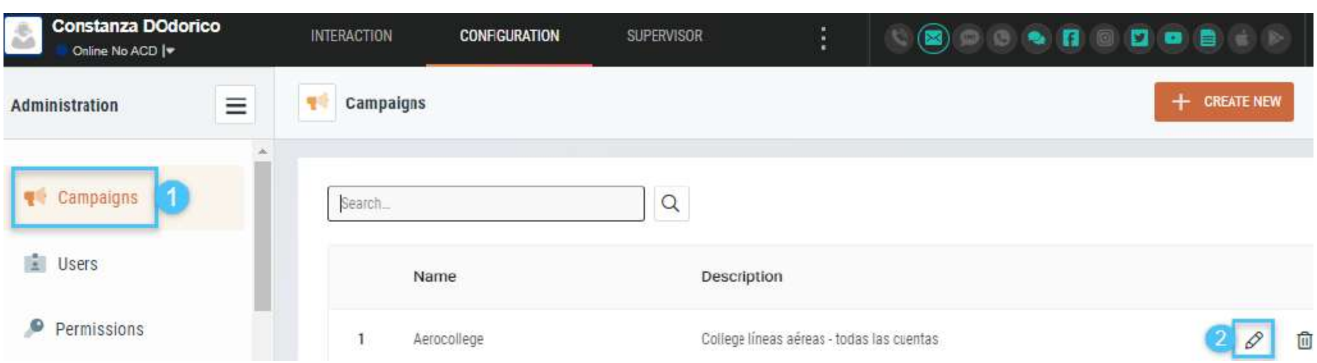
> You can associate several mail accounts to a campaign, exclusively depending on the Contact Center operation.

To associate a Mail account to a campaign you have to:

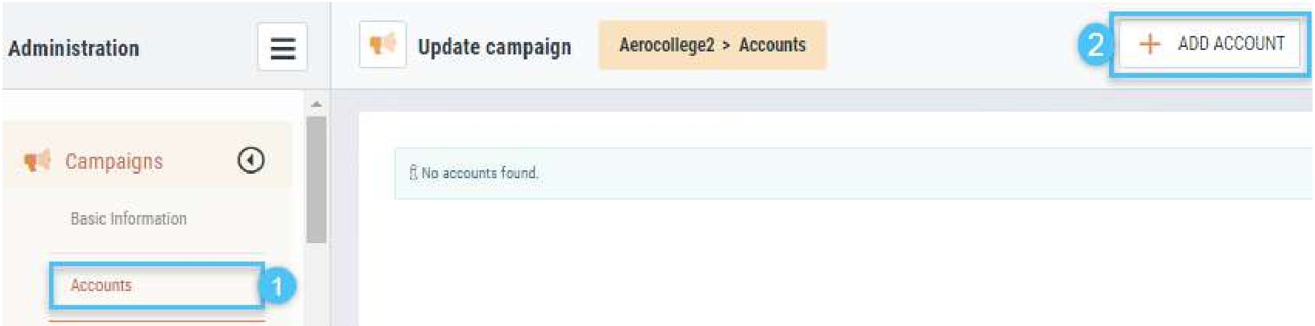
1. Go to the “Configuration” tab:



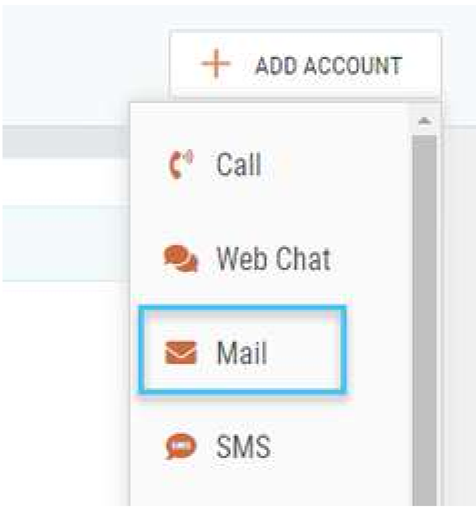
2. Click the "Campaigns" section 1 and press the "Edit" button of the campaign you will associate the account to 2 :



3. Click the campaign's "Accounts" 1 sectionand then press the "NEW ACCOUNT" button 2 :

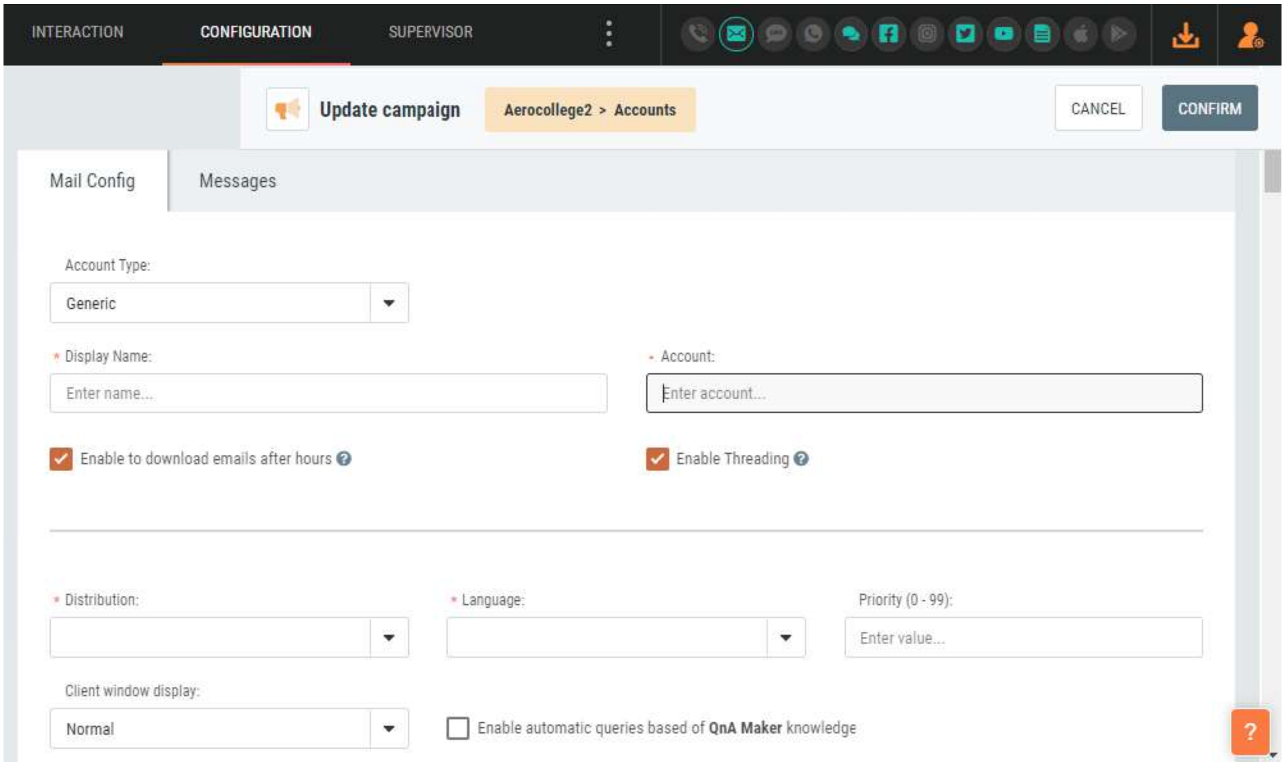


4. Select the "Mail" account type:



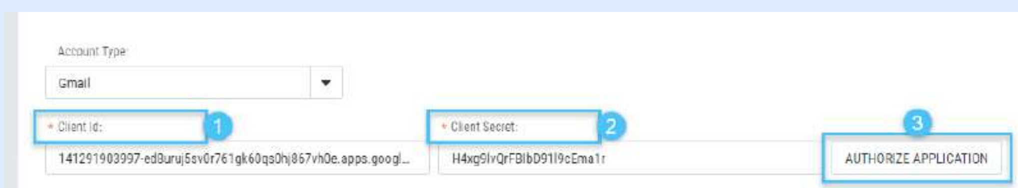
5. Enter the required information:

   a. **General information:**

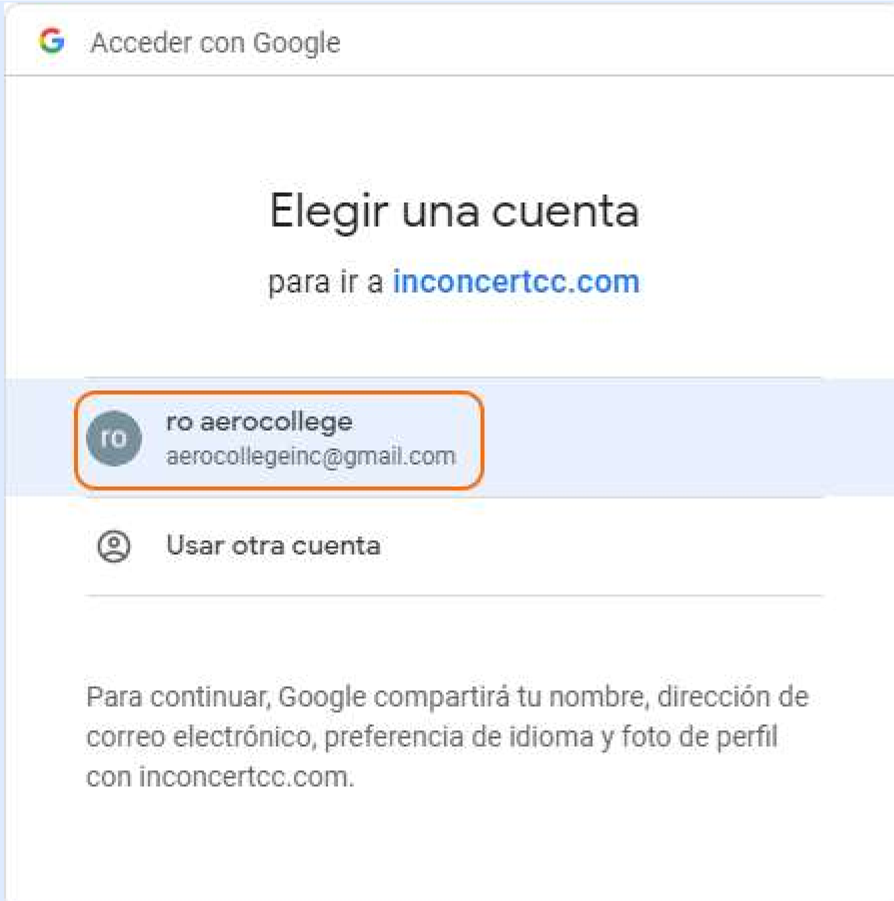


Account Type: type of mail account to configure. The options are: *Gmail, Outlook, Yahoo or others.* Should you select Gmail, Outlook or Yahoo, several of the required fields below are filled out automatically.

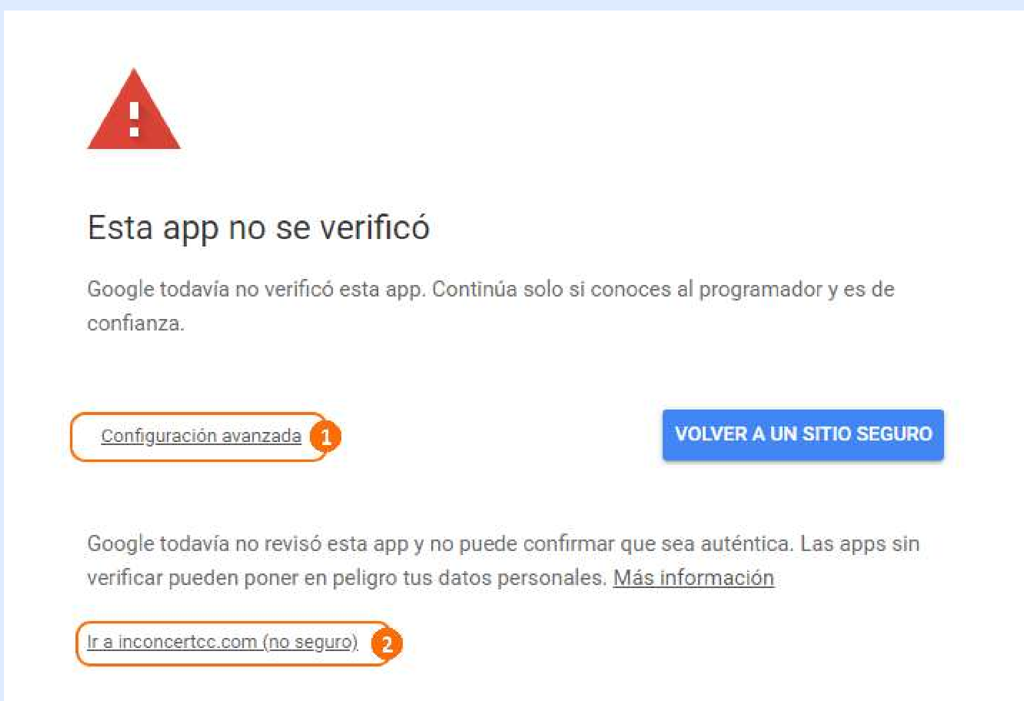
i. In the case of Gmail accounts, you must enter the *Client ID* and *Client Secret*. To obtain this information, read: Create a Google Application to authenticate Gmail accounts using OAuth 2.0  and then click on authorize application .



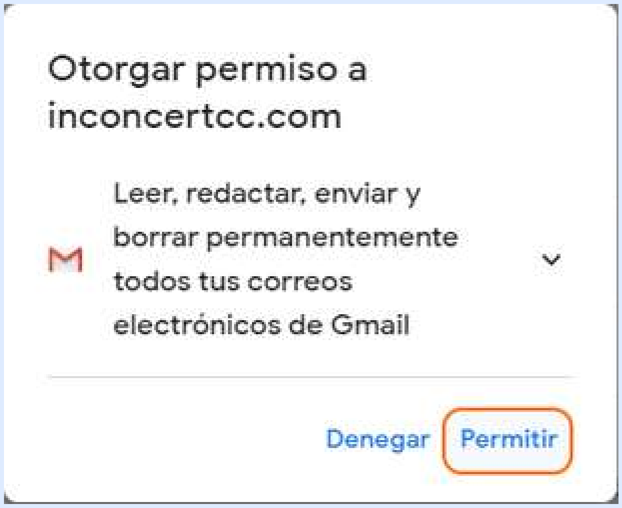
ii. Select the account you want to associate:



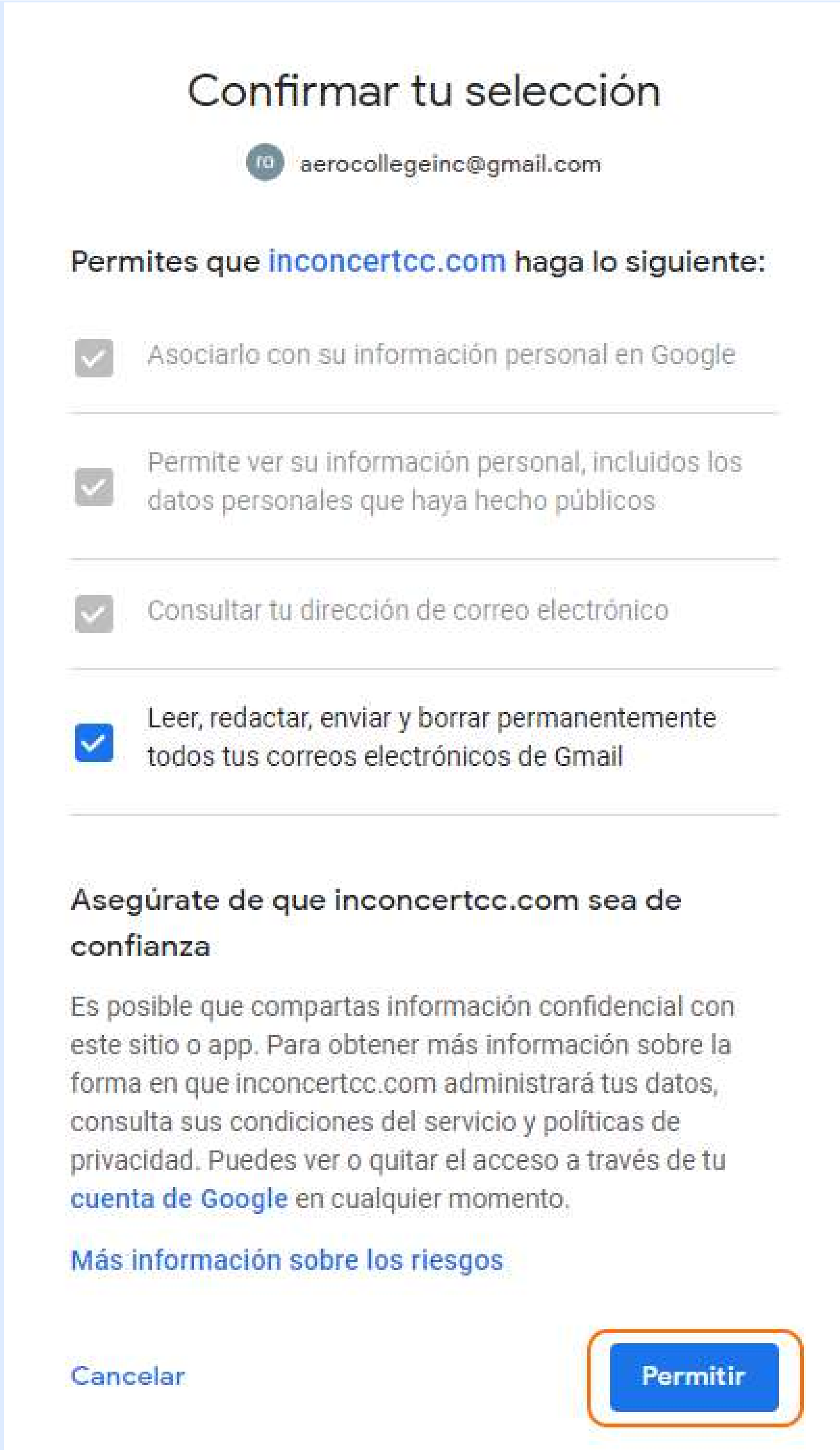
iii. The following window will be displayed where you must click "Advanced Configuration" 1 and then "Go to inconcertcc.com (not secure) 2 .



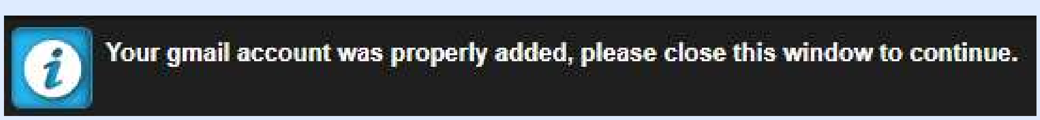
iv. Click "Allow" to grant the necessary permissions.



v. Finally, click the "Allow" button again.



vi. The Gmail account will obtain the necessary permissions:



Account: mail address which is being associated.

Distribution: criteria with which the mails that come from the account will be distributed between the operators.

Click here to expand...

Circular: assigns the interaction to the operator which has been idle for the most time.

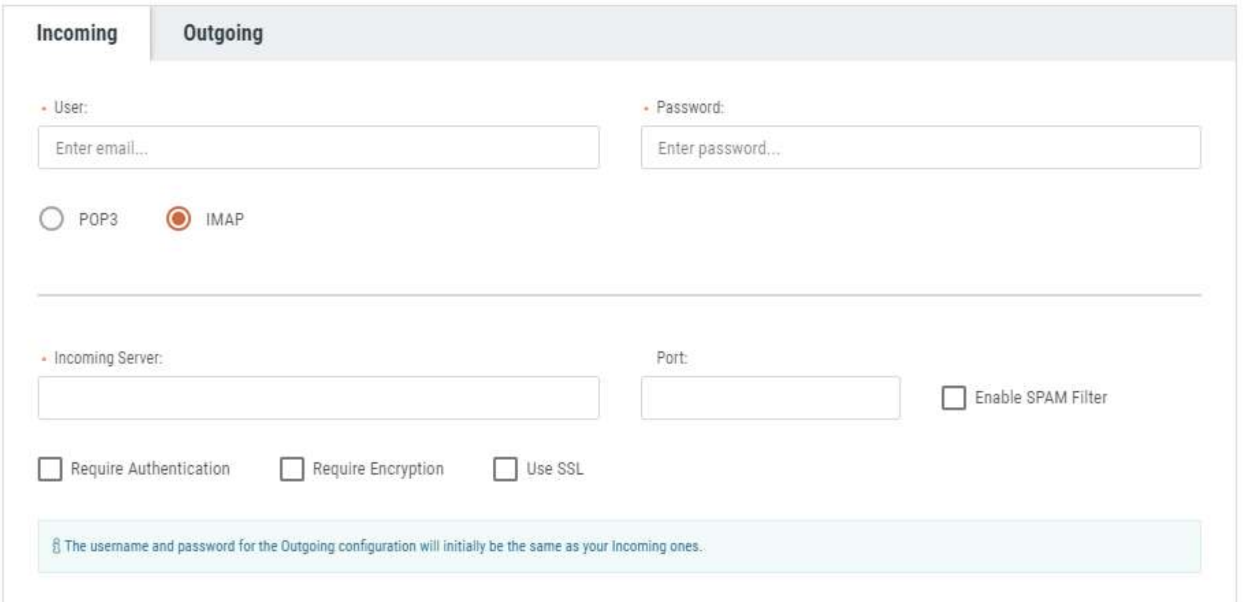
Queue: sends the new interactions to the campaign's queue to be taken or assigned manually.

Skill: the interactions will be assigned to the highest qualifying operator in terms of the skills necessary for the campaign; to choose between operators with the same skill score, the system distributes the interaction as the "Circular" algorithm behaves. If Skill is selected, you will have to set up the agents' skills in order to enable the system to evaluate them for distribution.

Use Threading: checked by default, specifies that the inbound mails are threaded as one interaction or as separate interactions if disabled.

Priority: defines the priority of the mails of this account in respect to the communications coming from others; the higher the number, the higher the priority.

b. **Inbound Mail Server Setup:**

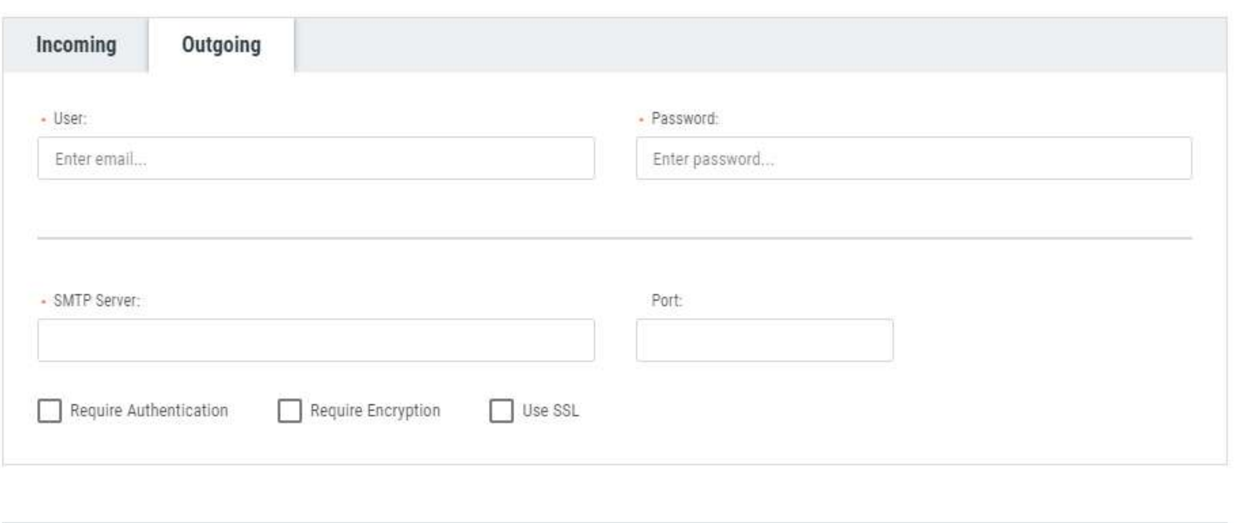


The required fields must be specified to configure an incoming mail server.

You can read about the download behavior for each of them in the following articles:

i. How email download works in accounts configured with IMAP
ii. How email download works in accounts configured with POP

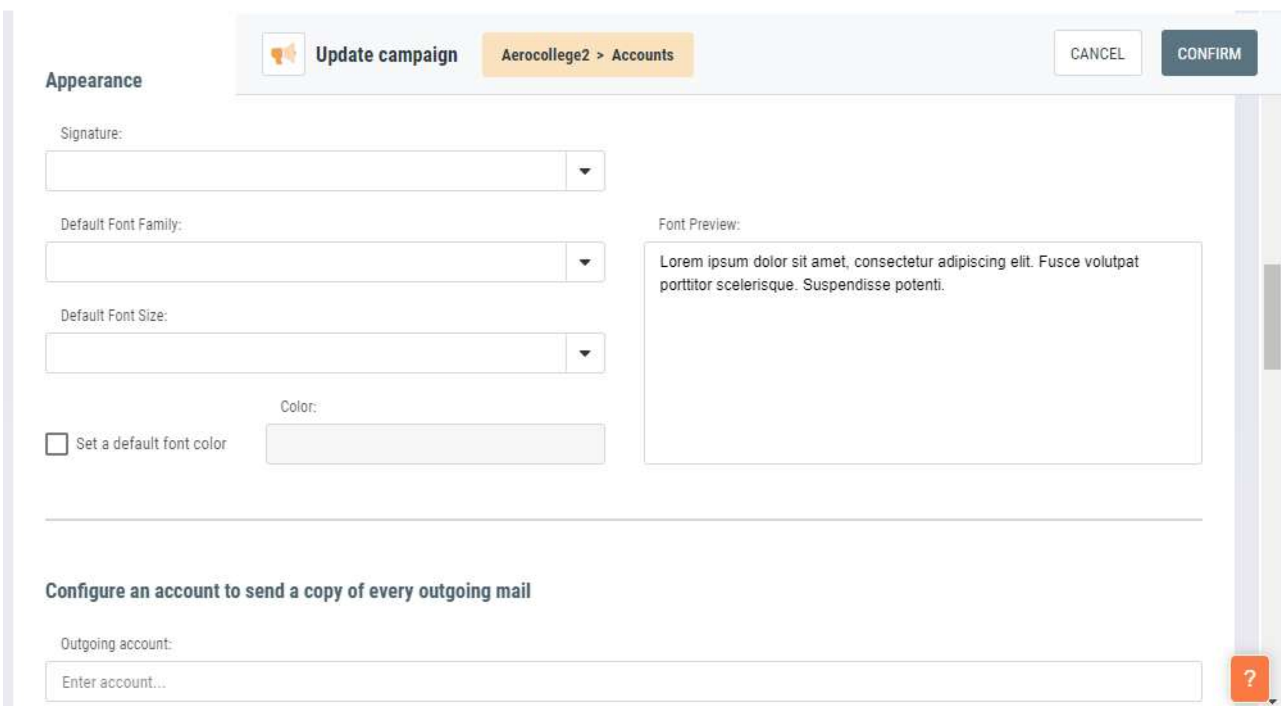
c. **Outbound Mail Server Setup:**



The fields required to configure an outgoing mail server must be specified.

When setting up the inbound mail server, the specified information is replicated on the outbound mail server setup. This information can be edited if necessary.

d. **Outbound BCC and appearance:**



Display name: name that will be displayed when receiving an email sent from this account.

Language: language that the spell checker will use when writing an email from this account.

Signature: signature that will be used when writing a new email from this account. To learn how to create a signature, read: "How to create a Signature".

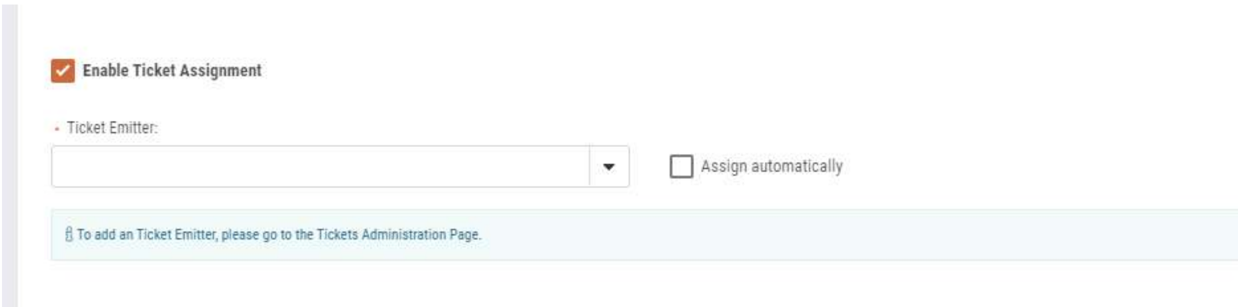
Default Font Family: font that will be used by default in emails written from this account.

Default Font Size: size that will be used by default in emails written from this account.

Outgoing Bcc: email account to which a blind copy of each email sent from this account will be sent

Generally this field is used for audits of emails sent.

e. **Attention Level:** You will be able to select from among the *Attention Levels* previously created, the one most appropriate for the operation of this account.
f. **Ticket manager:** You can enable *Tickets Management* to manually or automatically assign tickets to the interactions associated with this account, and you can also select a previously configured ticket issuer.

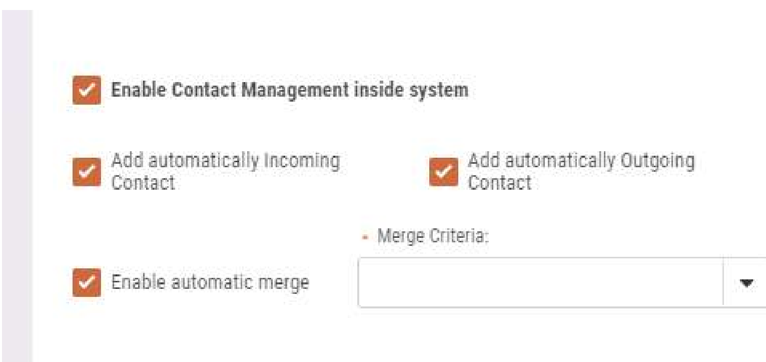


Assign tickets: if you check this box, you will be enabling the option to assign tickets to the interactions belonging to this account.

Automatic: if this box is checked, the tickets will be assigned automatically

***Ticket issuer::**
Click here to expand...
You will need to select a previously configured ticket issuer, see How to create a ticket issuer.

g. **Contact Management:** enabling "Contact Management" you can create a new contact on each interaction, and if necessary, the system can perform it automatically, either for inbound as well as for outbond interactions, also being able to define a criteria to save the contact data:



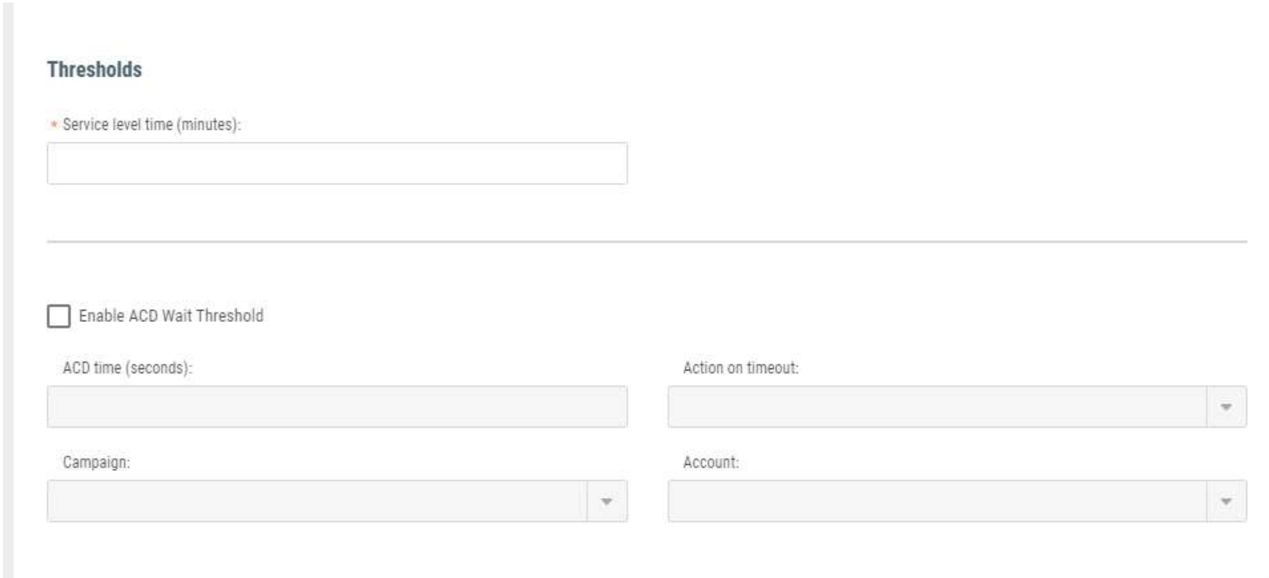
Contact Management: by checking this checkbox, you will enable the possibility to create a new contact with each interaction.

Add contact automatically: by checking these checkboxes, the system will automatically create a new contact for each inbound and/or outbound interaction. *If not checked, the contact creation will be manual.*

Automatic unification: by checking this box, you must define the data saving criteria, being able to keep the already stored record, or updating the information on each new interaction.

h. **Thresholds:**

This information is not specific to the account, but will be shared by all the channel's accounts. Editing this field will be possible only if the account is the first one of its type being set up, otherwise, the fields will be merely informative. To edit the channel's thresholds, read: "How to edit a Channel's general setup".



Thresholds: the time **thresholds** are specified here for different operative and attention actions.

Service Level: maximum response time to consider a communication to be attenden within the desired Service Level.

6. After completing all the required fields, press the "SAVE ACCOUNT" button to continue.
7. To cancel the operation without saving the changes, press the "CANCEL ACCOUNT" button.

Related Articles

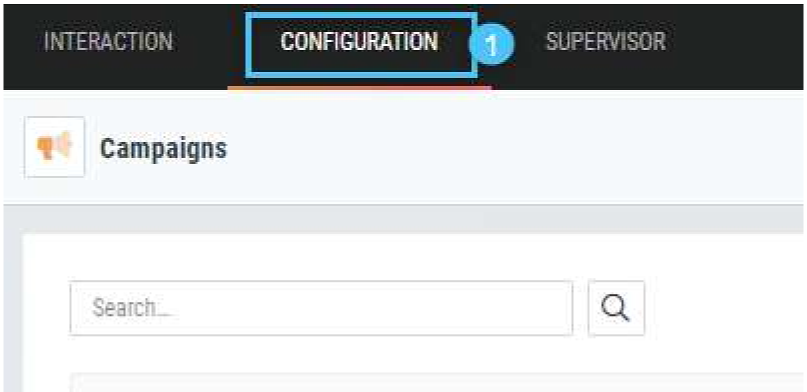
- User search
- How to set up Messenger messaging
- How to associate a YouTube account
- How to associate an application from Google Play Store
- How to associate an application from the App Store

How to configure auto-reply in an email account

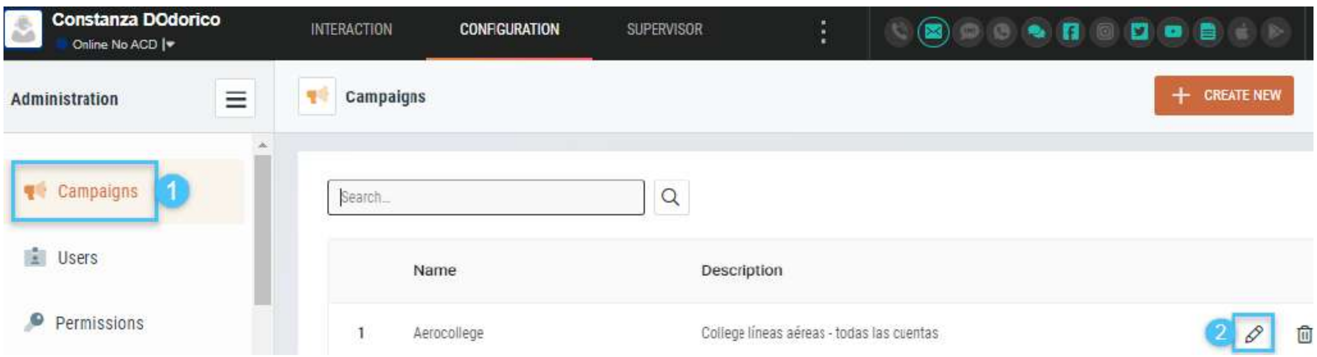
In InConcert Omnichannel, it is possible to configure an auto-reply mail that runs automatically when an incoming interaction is generated to an email account.

To set up an auto-reply mail, follow these steps:

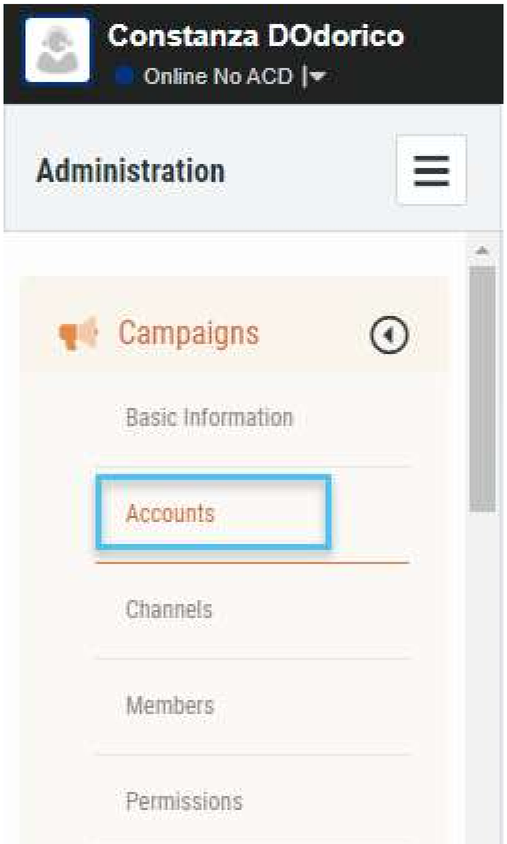
1. Go to the "*Configuration*" tab located at the top of the screen in the work environment in *OCC.*



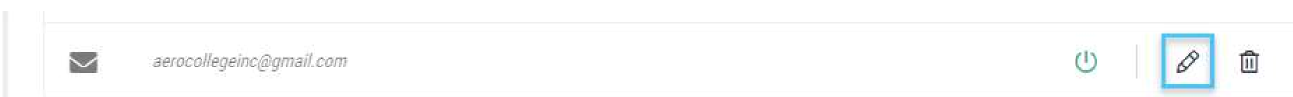
2. In the administration panel located on the left margin of the screen, click on the "*Campaigns*" tab  , then click the "*Edit*" button  associated with the campaign in which you want to activate the auto-reply mail.



3. In the area on the left of your screen, a list of sections related to the administration of the campaign will be displayed, click on the "*Accounts* " section:



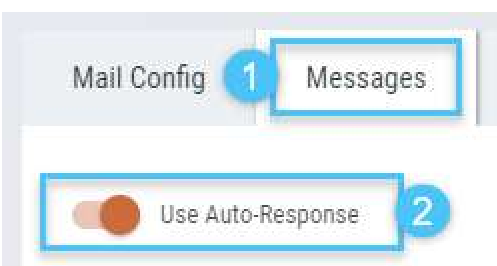
4. You will then see on the screen all the accounts associated with the campaign. Click the "*Edit*" button associated with the mail account to which you want to assign the auto-reply:



5. Then click on the "*Messages*" tab 

 and then click on the confirmation box "*Use auto-response*": 

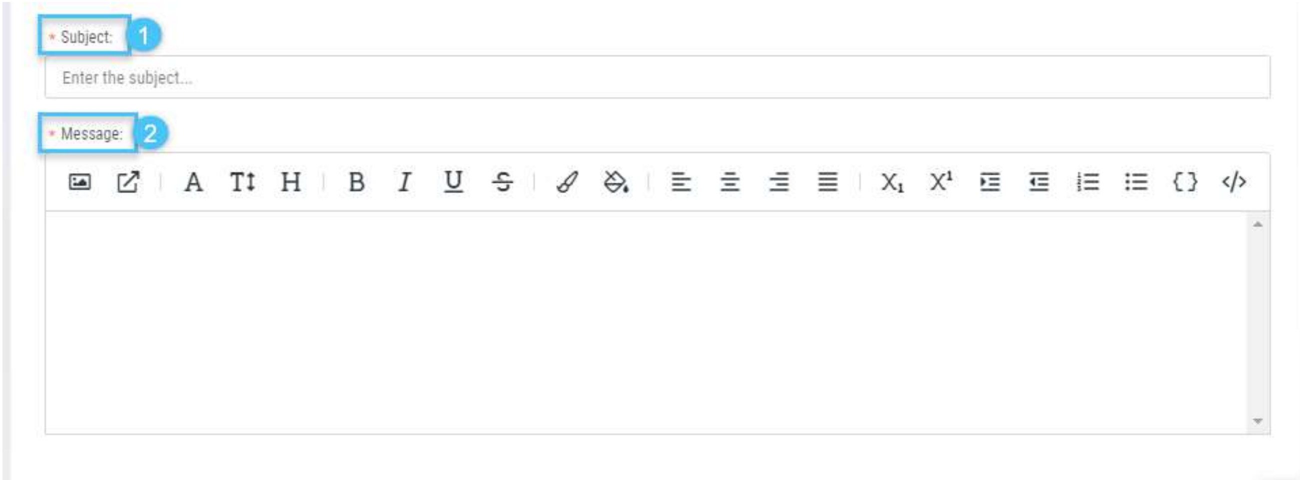
 :



6. You must then determine the "*Subject*" 

 and the "*Message*" 

 of the automatic mail.



When composing the message, you can also use the text editing tools and the Variables available

7. Finally, click the "*SAVE*" button to save the changes made to the account.

Related Articles

- User search
- How to set up Messenger messaging
- How to associate a YouTube account
- How to associate an application from Google Play Store
- How to associate an application from the App Store

Configuration of Social Networks

- How to associate an Instagram account
- How to associate a Facebook account
- How to associate a Twitter account
- How to associate a YouTube account

How to associate an Instagram account

Associating an Instagram account with a campaign allows you to manage from i6 all the interactions associated with your own post, direct mentions and mentions about a comment.

To register an Instagram account in inConcert you must have the following: A :

- Facebook account with an associated page.
- An Instagram account associated with the Facebook page.

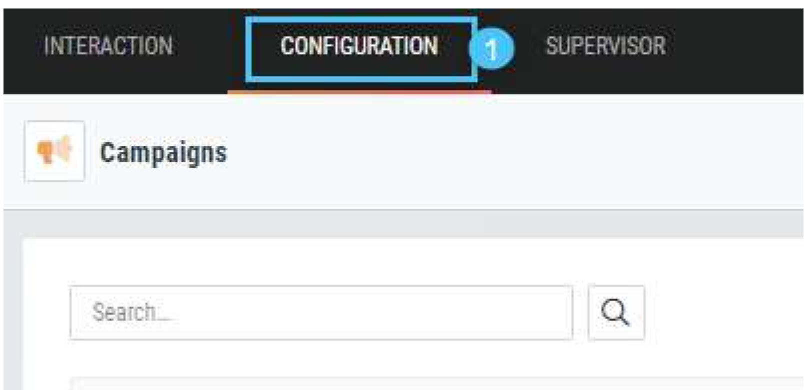
Para asociar una cuenta de Instagram a una página de Facebook se debe hacer lo siguiente:

1. On the Facebook page that you want to associate with the Instagram account, click on the "Settings" button.
2. A list will be displayed on the left of the screen showing all the sections, click on the "Instagram" section
3. Login with the credentials of the Instagram account that you want to associate with the Facebook account.

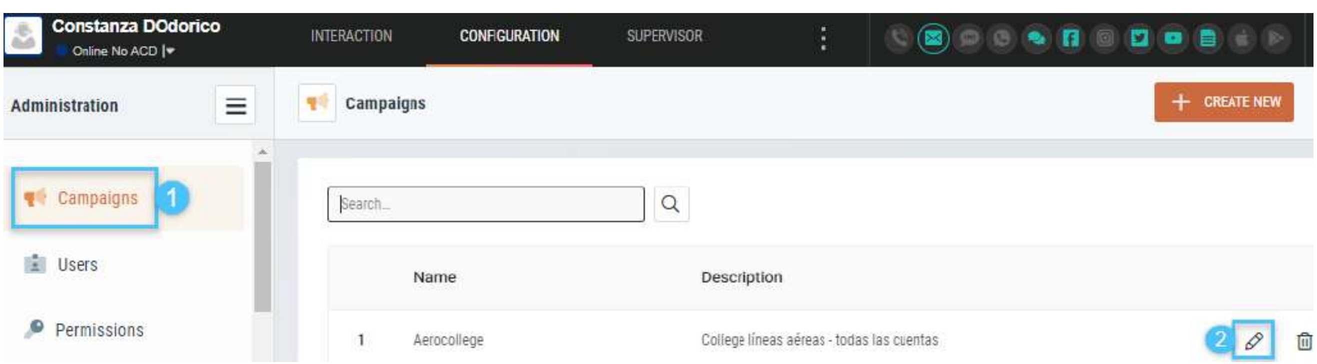
By doing this, the Instagram account will become a "Business Account" which we can use from inConcert

To associate an Instagram account with a campaign:

1. Go to the "*Configuration*" tab of your OCC environment

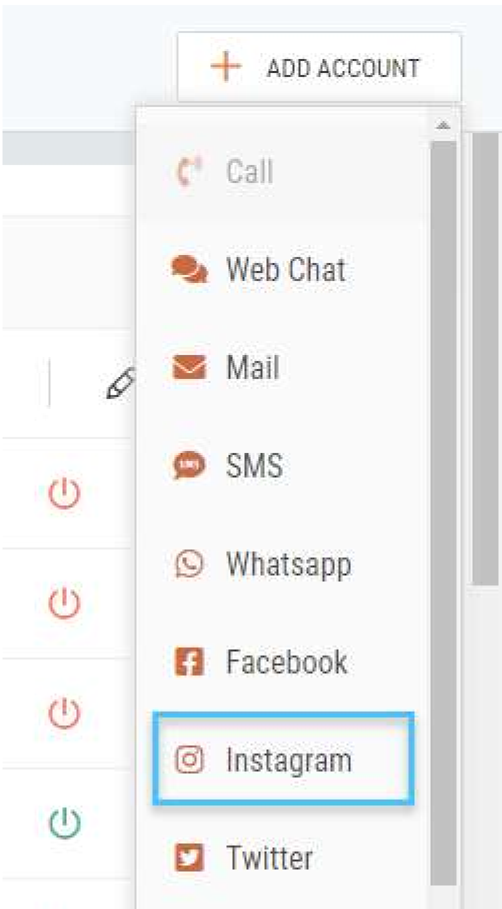


2. Click on the "*Campaigns*" section 1 and then click the button "*Edit*" 2 in the campaign to which you want to associate the account:

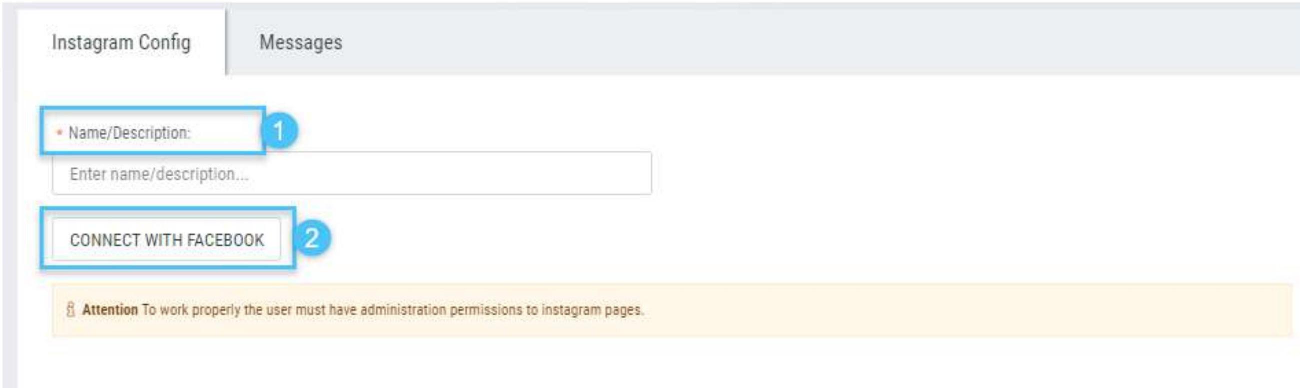


3. Click on the "*Account*" section and then click the button "*///NEW ACCOUNT*" :

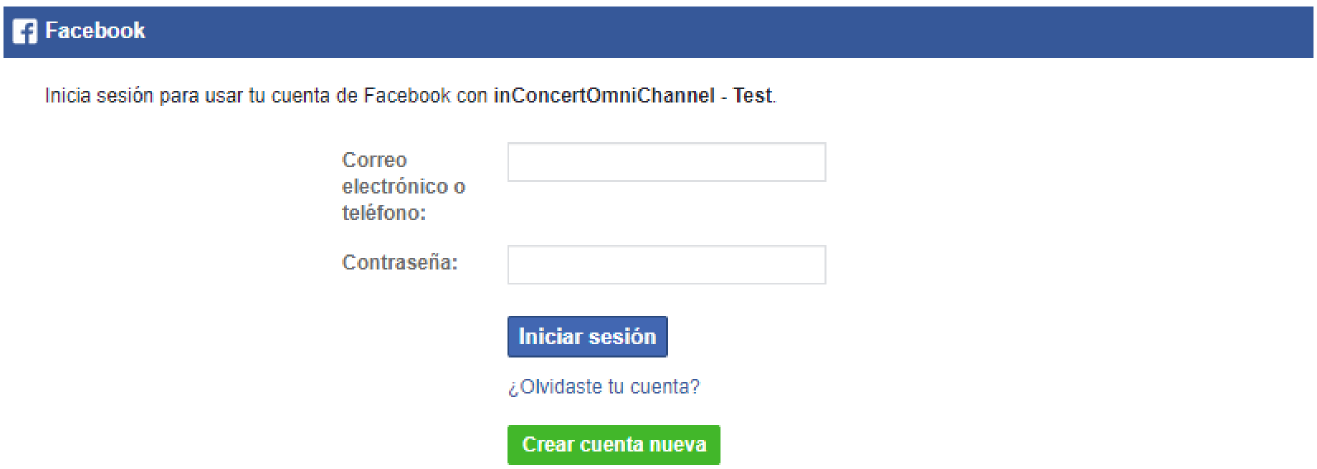
4. Select by clicking on the account type "*Instagram*"



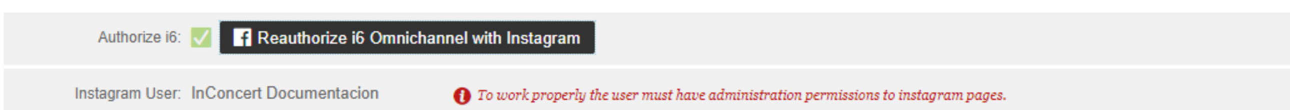
5. Enter the name that will identify the account in the system . Likewise, you must authorize OCC to access the account that you will associate, just click the button "*Connect with Facebook*" :



6. Enter the data of the *Facebook* account *associated with the Instagram account that you want to link*, and then click the "*Login*" button:



7. It will be shown with a "*check*" if the account was authorized correctly and the "*Connect with Facebook*" button will change to "*Reauthorize i6 Omnichannel with Instagram*", which must be clicked if you want to re-authenticate the account.
In the field "*Instagram User*", the name of the associated Instagram user is shown:



8. The required data on the distribution of interactions, their priority and their main language must be specified:

Distribution: criteria by which the interactions that come from this account will be distributed to the operators

Click here to expand...

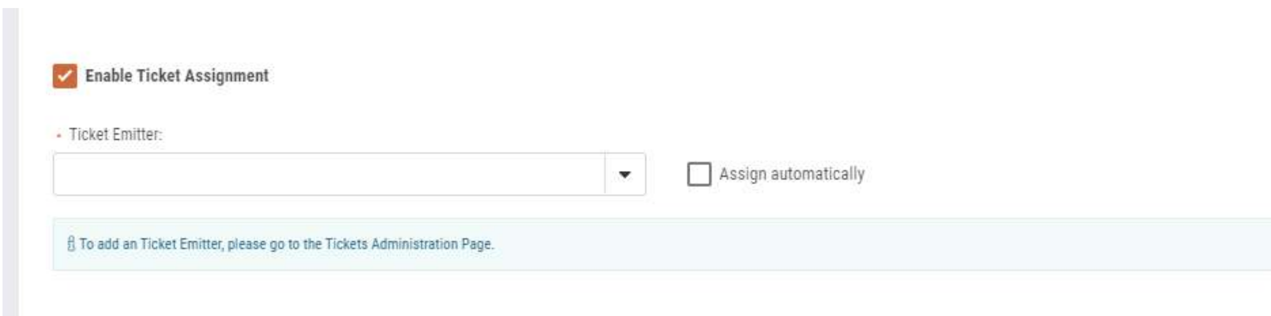
Circular: assigns interactions to the operator who has been in the Available state for the longest time.

Queued: send new interactions to the campaign queue; to be taken or assigned manually.

> **Skill:** the interactions will be assigned to the operators who have the highest ratings in terms of the skills required for each campaign; the "Circular" algorithm is applied to select between operators who receive the same skill score. If you select this, you must indicate the agent skills that you want to consider in the distribution
>
> **Priority:** defines the priority of the interactions of this account with respect to the communications that come from others; the higher the number that is entered, the higher the priority.
>
> **Language:** operators have a spell checker that is enabled when they are responding to an interaction. If the system cannot automatically identify the language of the interaction, it takes the one which has been set in this field.

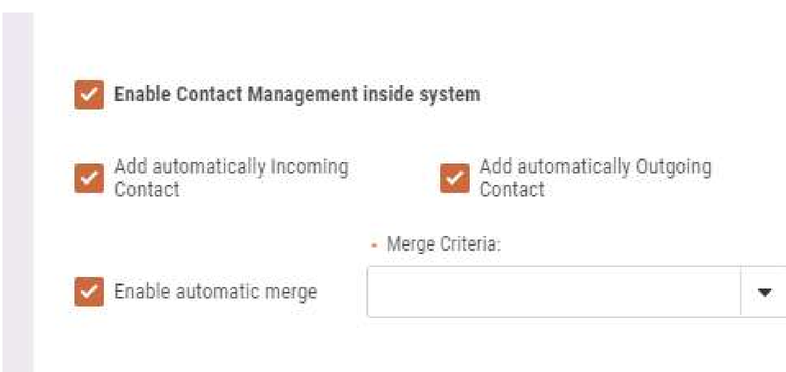
9. Select the associated Facebook page:

10. **Attention Level:** You will be able to select from among the *Attention Levels* previously created, the one most appropriate for the operation of this account.
11. **Ticket manager:** You can enable *Tickets Management* to manually or automatically assign tickets to the interactions associated with this account, and you can also select a previously configured ticket issuer.



> **Assign tickets:** if you check this box, you will be enabling the option to assign tickets to the interactions belonging to this account.
>
> **Automatic:** if this box is checked, the tickets will be assigned automatically.
>
> ***Ticket issuer**
> Click here to expand...
> *You will need to select a previously configured ticket issuer, see How to create an issuer.*

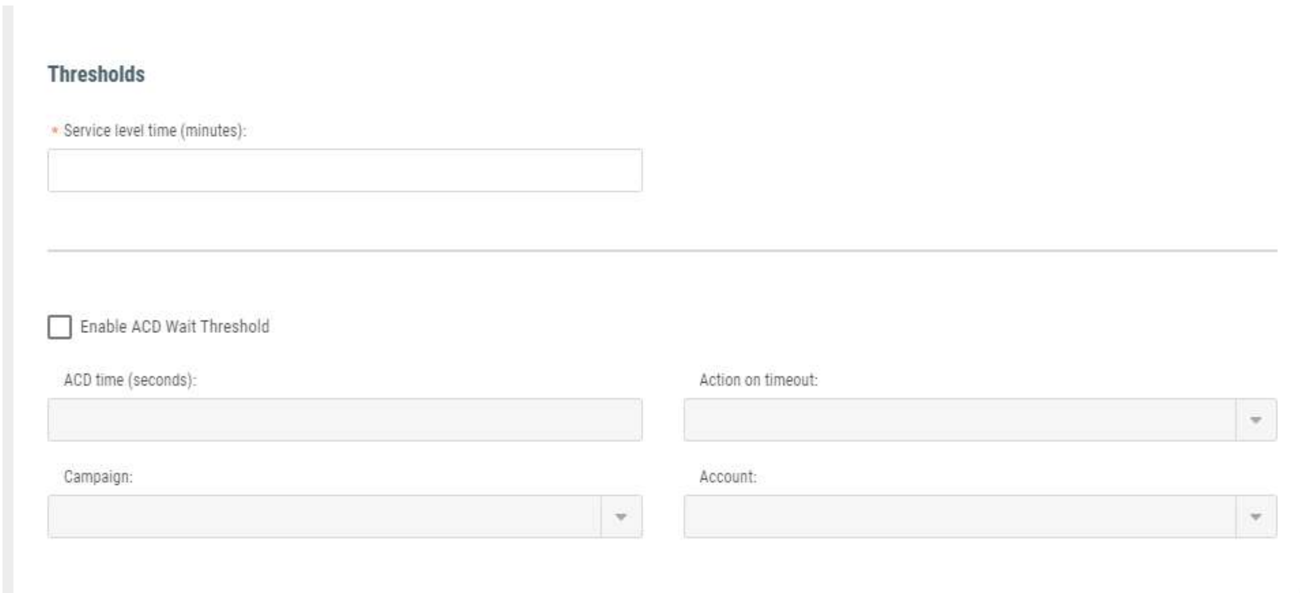
12. If you want, configure the contact management of your account



> **Contact management:** if you check this box, you will be enabling the option to create a new contact with each interaction.
>
> **Auto Add Contact:** if you check these boxes, the system will automatically create a new contact for each inbound and/or outbound interaction. *If it is not checked, contacts will be created manually.*
>
> **Automatic unification:** after checking this box, you must define the criteria for saving the contact data. You can either keep the contact data already stored, or update the data in each new interaction.

13. **Umbrales:**

> This information is not specific to the account but will be common to all accounts in the channel. Editing from here will only be possible if the account being defined is the first of its type, otherwise they will be read-only fields. To edit the channel thresholds, read: "How to edit the general channel settings".



> **Thresholds**: here you specify the time **thresholds** for different service and operational actions.
>
> **Service Level**: maximum answer time for the communication to be considered to have been attended within the desired Service Level.

14. After completing all the required fields, click the "SAVE" button to continue.
15. To cancel the operation without saving the entered data, click the “CANCEL” button.

> Understand how Instagram Proxies work by reading the following article: How Instagram Proxies Work.

Articulos relacionados

- Como crear cuenta developer en Facebook
- Cómo funcionan los Proxies de Facebook en OCC
- Cómo asociar una cuenta de Correo
- Cómo crear una cuenta de Llamadas
- Cómo crear una cuenta de Formulario de contacto

How to associate a Facebook account

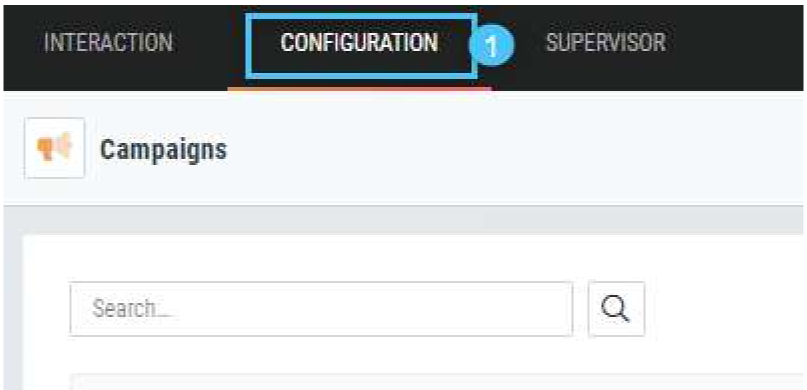
Associating a Facebook account to a campaign allows to handle all the interactions contacts have over the pages managed by such account (it can be one or more) through i6.

The interactions can be: comments about a post, wall comments, replies to comments and private messages.

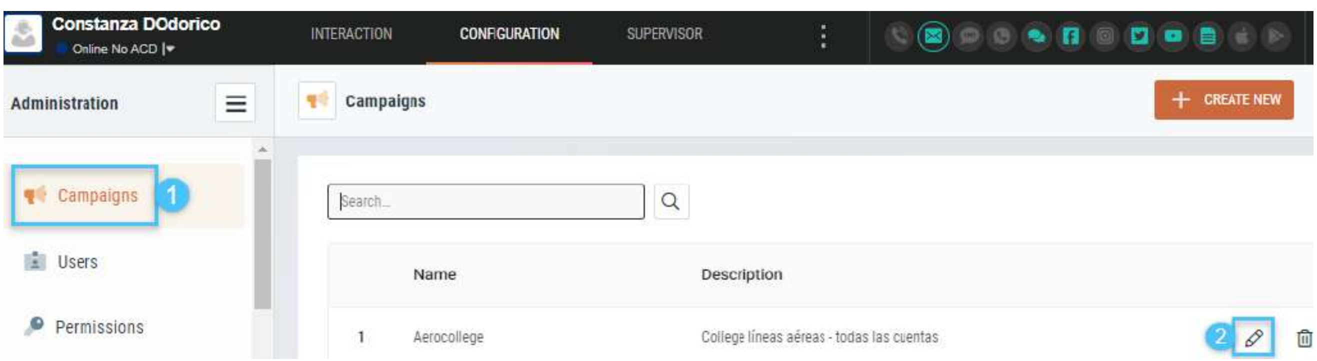
> You can associate several Facebook accounts to a single campaign, exclusively depending on the Contact Center operation.
>
> You can associate different Facebook accounts to a same Facebook user; for a single campaign as well as many.

To associate a Facebook account to a campaign you have to:

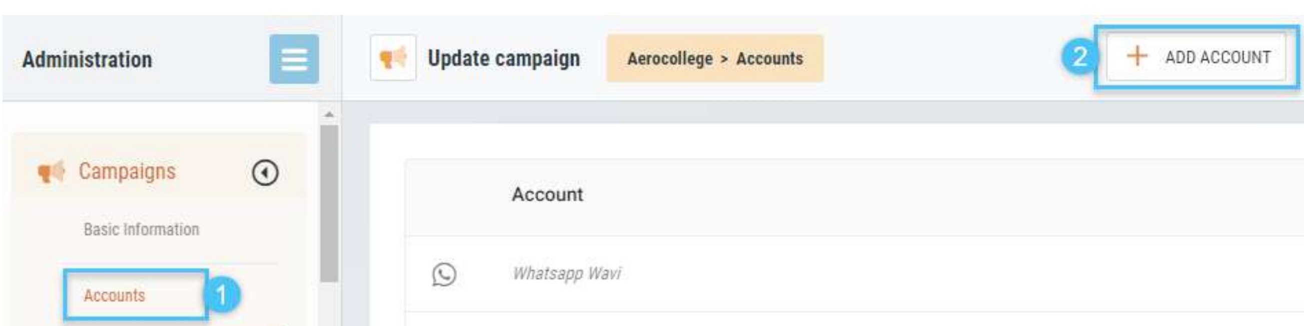
1. Go to the "Configuration" tab:



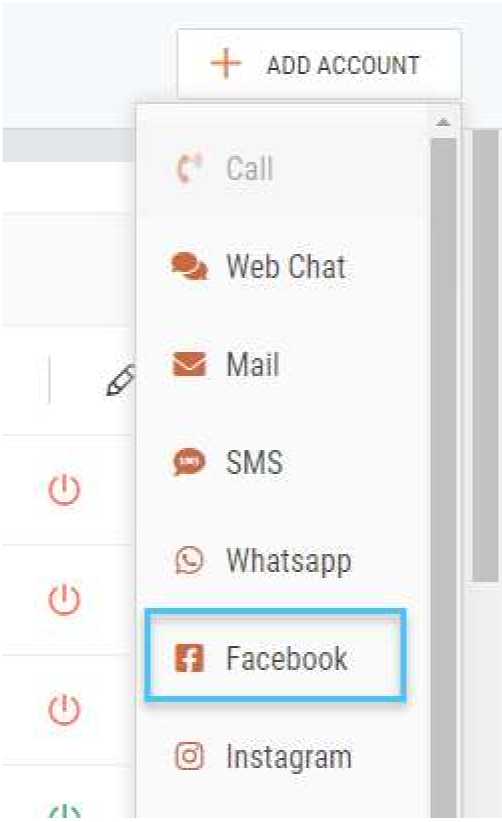
2. Click on the "Campaigns" section 1 and press the "Edit" button of the campaign to which you will associate the account 2 :



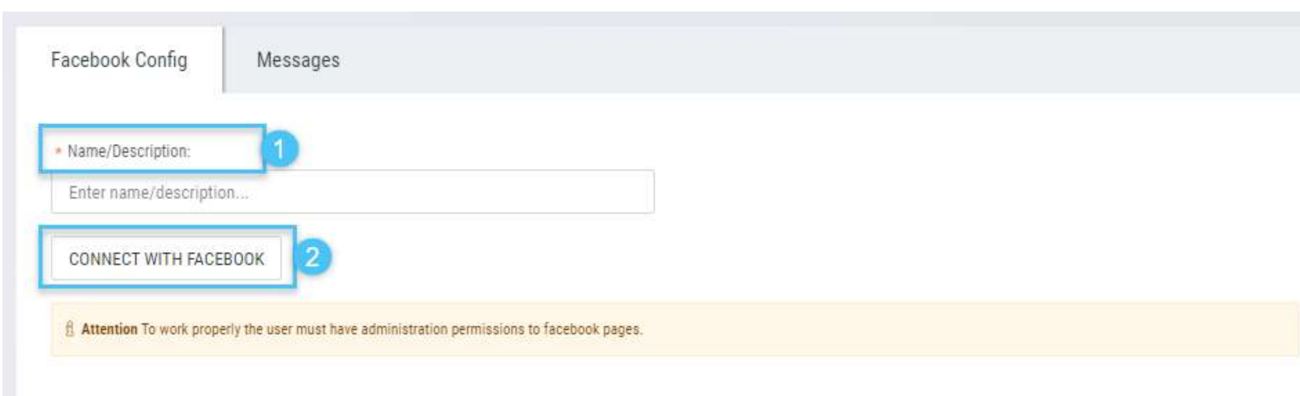
3. Click the campaign's "Accounts" section 1 and then press the "NEW ACCOUNT" button 2 :



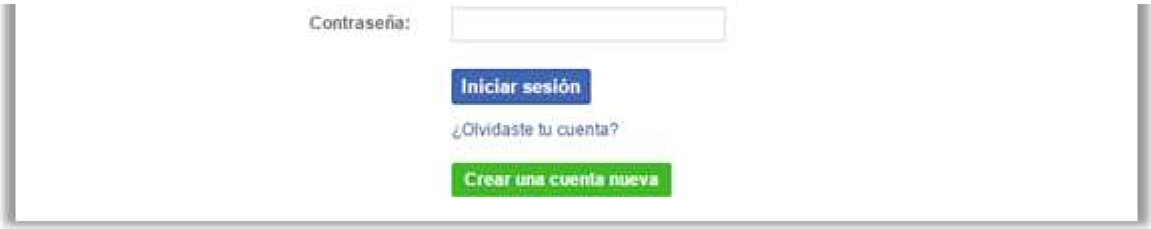
4. Select the “Facebook” account type:



5. Enter the name that will identify the account in the system . You also have to authorize i6 to use the account you will associate, by pressing the "Authorize application" button :

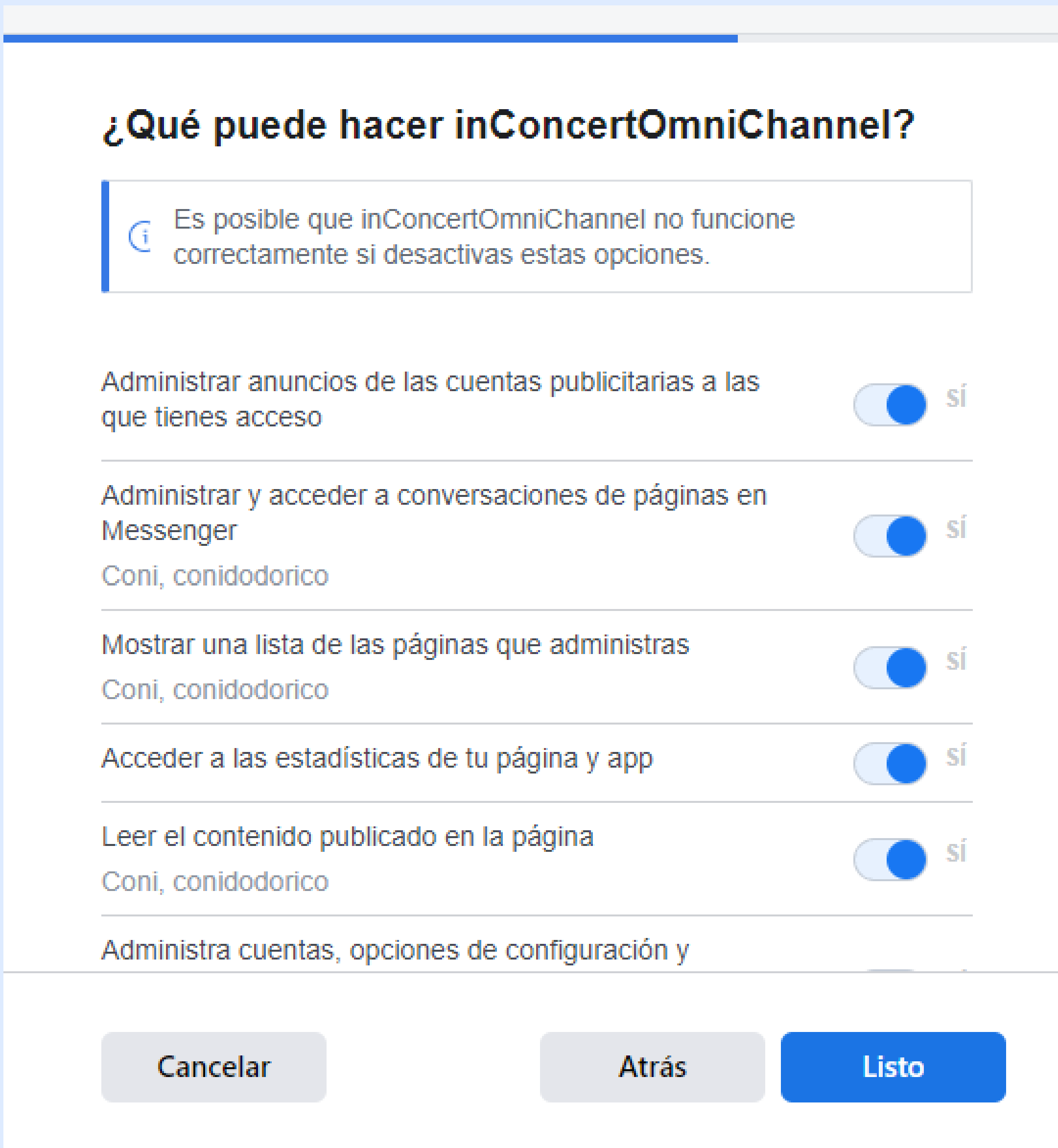


6. Enter the Facebook account data and then press the "Start session" button:

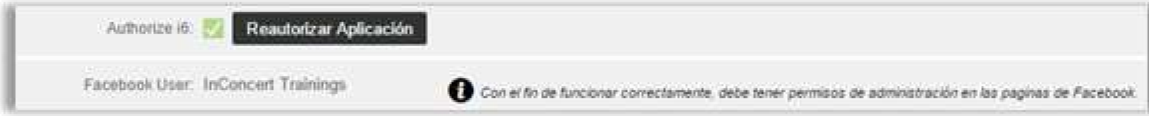


If you do not have a Facebook account, you can create one by clicking the "Create a new account" button.

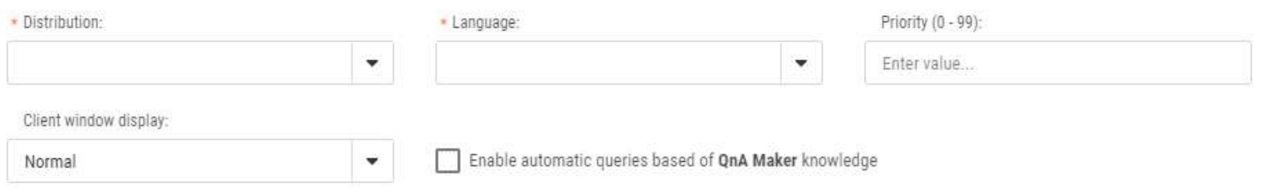
Within the Facebook settings, select the permissions to be granted to inConcert OCC. You must select all of them. And confirm, in case of any later problems, that they have not been removed after the initial configuration. It could lead to the account being unlinked.



7. A "*check*" will be shown if the account was authorized correctly, and the "Authorize Application" button changes to "Reauthorize Application", which you have to press in case you want to authenticate the account again. The "Facebook User" field shows the associated Facebook user's name:



8. You must specify the required information regarding distribution of interactions and main language to be used in them:



Distribution: criteria with which the interactions that come from the account will be distributed between the operators.

Click here to expand...

Circular: assigns the interaction to the operator which has been idle for the most time.

Queue: sends the new interactions to the campaign's queue to be taken or assigned manually.

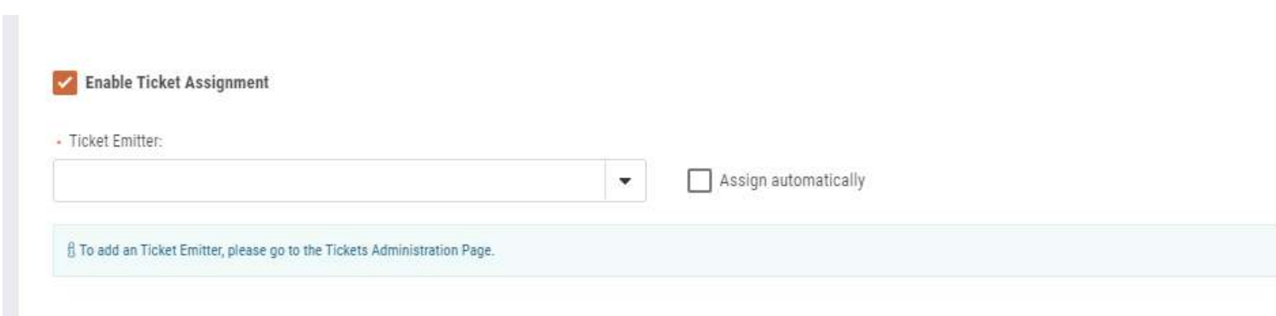
Skill: the interactions will be assigned to the highest qualifying operator in terms of the skills necessary for the campaign; to choose between operators with the same skill score, the system distributes the interaction as the "Circular" algorithm behaves. If Skill is selected, you will have to set up the agents' skills in order to enable the system to evaluate them for distribution.

Priority: defines the priority of the mails of this account in respect to the communications coming from others; the higher the number, the higher the priority.

Language: the operators can make use of the spell checker, which enables when the interaction is being responded. If the system is not able to automatically identify the interaction language, it will consider the one entered in this field.

9. Select the pages which will be verified and managed through OCC:

10. **Attention Level:** You will be able to select from among the *Attention Levels* previously created, the one most appropriate for the operation of this account
11. **Ticket manager:** You can enable *Tickets Management*to manually or automatically assign tickets to the interactions associated with this account, and you can also select a previously configured ticket issuer.



Asignar tickets: al marcar esta casilla, estarás habilitando la posibilidad de asignar tickets a las interacciones pertenecientes a esta cuenta.

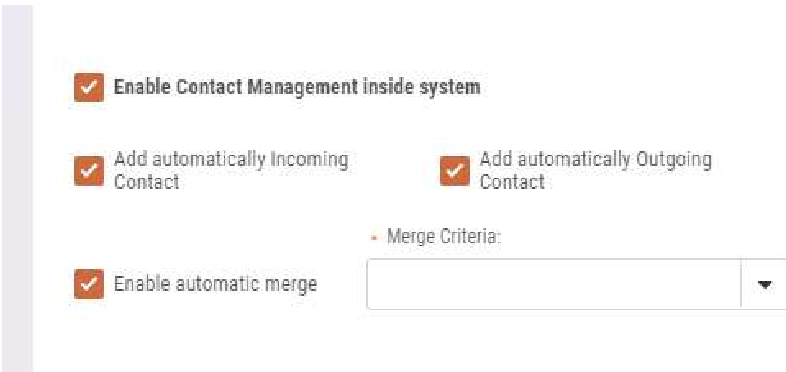
De forma automática: al marcar esta casilla los tickets se asignaran de forma automática.

***Emisor de tickets:**

Click here to expand...

Deberás seleccionar un emisor de tickets configurado previamente, véase Cómo crear un emisor.

12. **Contact Management:** enabling "Contact Management" you can create a new contact on each interaction, and if necessary, the system can perform it automatically, either for inbound as well as for outbond interactions, also being able to define a criteria to save the contact data:



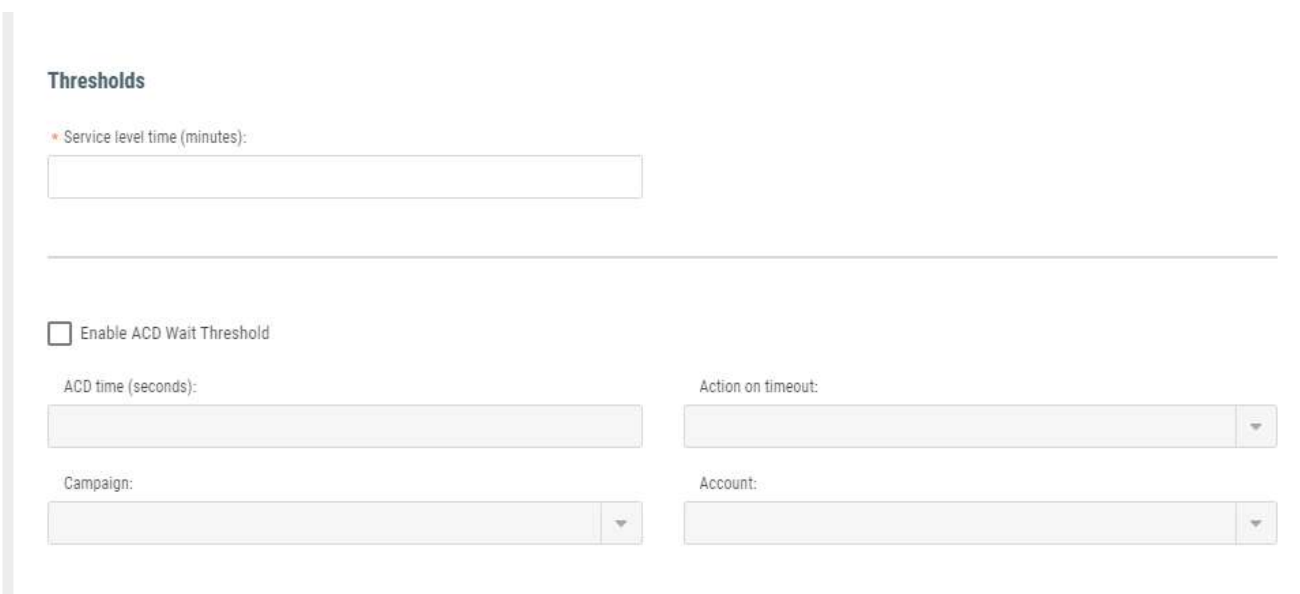
Contact Management: by checking this checkbox, you will enable the possibility to create a new contact with each interaction.

Add contact automatically: by checking these checkboxes, the system will automatically create a new contact for each inbound and/or outbound interaction. *If not checked, the contact creation will be manual.*

Automatic unification: by checking this box, you must define the data saving criteria, being able to keep the already stored record, or updating the information on each new interaction.

13. **Thresholds:**

This information is not specific to the account, but will be shared by all the channel's accounts. Editing this field will be possible only if the account is the first one of its type being set up, otherwise, the fields will be merely informative. To edit the channel's thresholds, read: "How to edit a Channel's general setup".



Thresholds: the time **thresholds** are specified here for different operative and attention actions.

Service Level: maximum response time to consider a communication to be attenden within the desired Service Level.

14. After completing all the required fields, press the "SAVE ACCOUNT" button to continue.
15. To cancel the operation without saving the changes, press the "CANCEL ACCOUNT" button.

? Unknown Attachment

Understand how Facebook Proxies work by reading the following article: How Facebook Proxies Work.

Related Articles

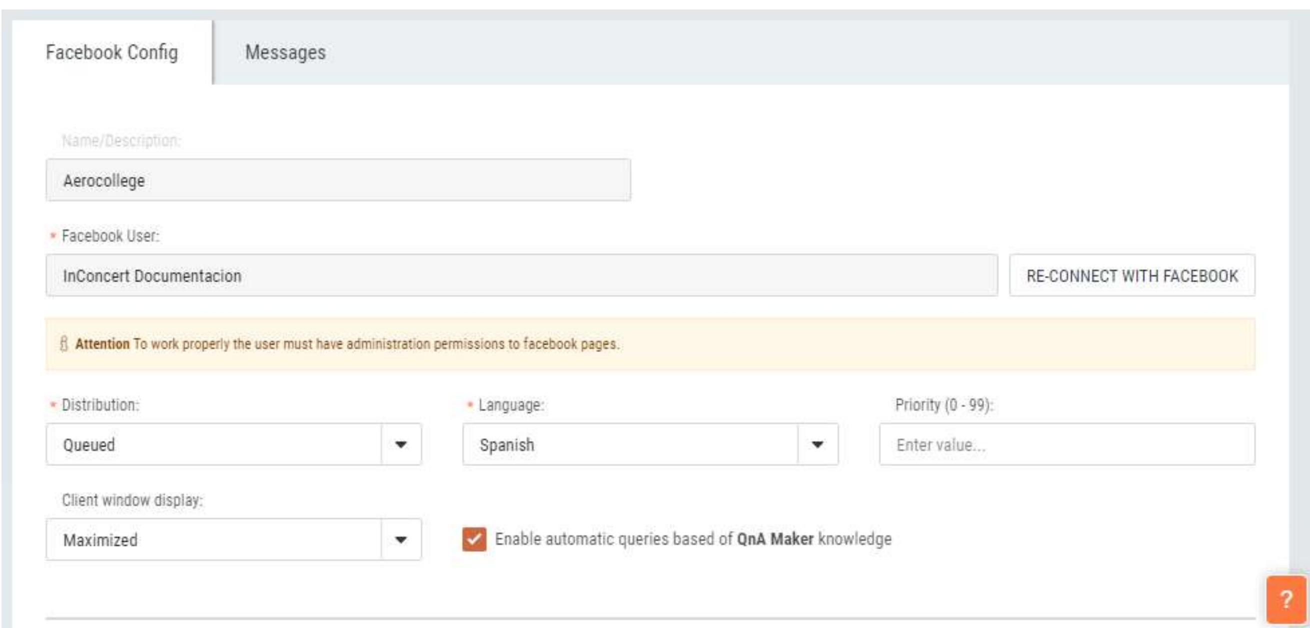
- Como crear cuenta developer en Facebook
- Cómo funcionan los Proxies de Facebook en OCC
- Cómo asociar una cuenta de Correo
- Cómo crear una cuenta de Llamadas
- Cómo crear una cuenta de Formulario de contacto

How to set up Messenger messaging

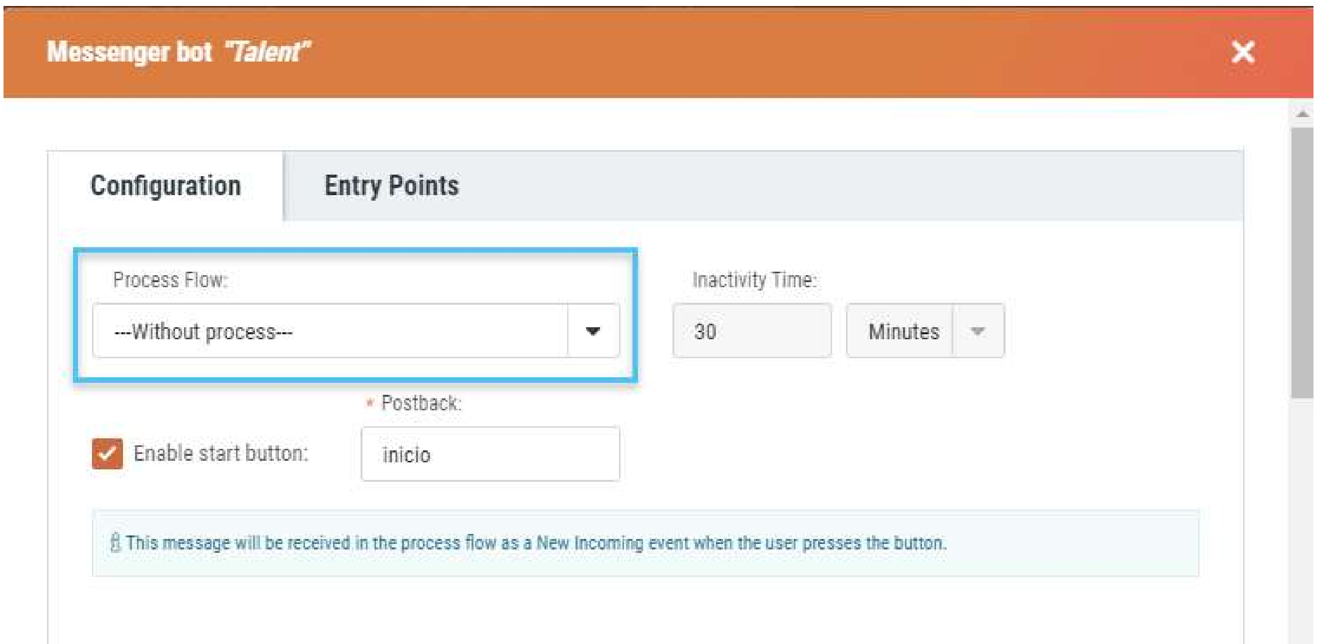
Messenger is the private or direct messaging service of Facebook. From the configuration of the Facebook account in the Omnichannel Contact Center, we can include a bot designed to respond to interactions with or without human interaction, and a menu of options available to the user.

To enter the Messenger bot configuration:

1. In create/edit of the Facebook account, click on the "Messenger Bot" button:



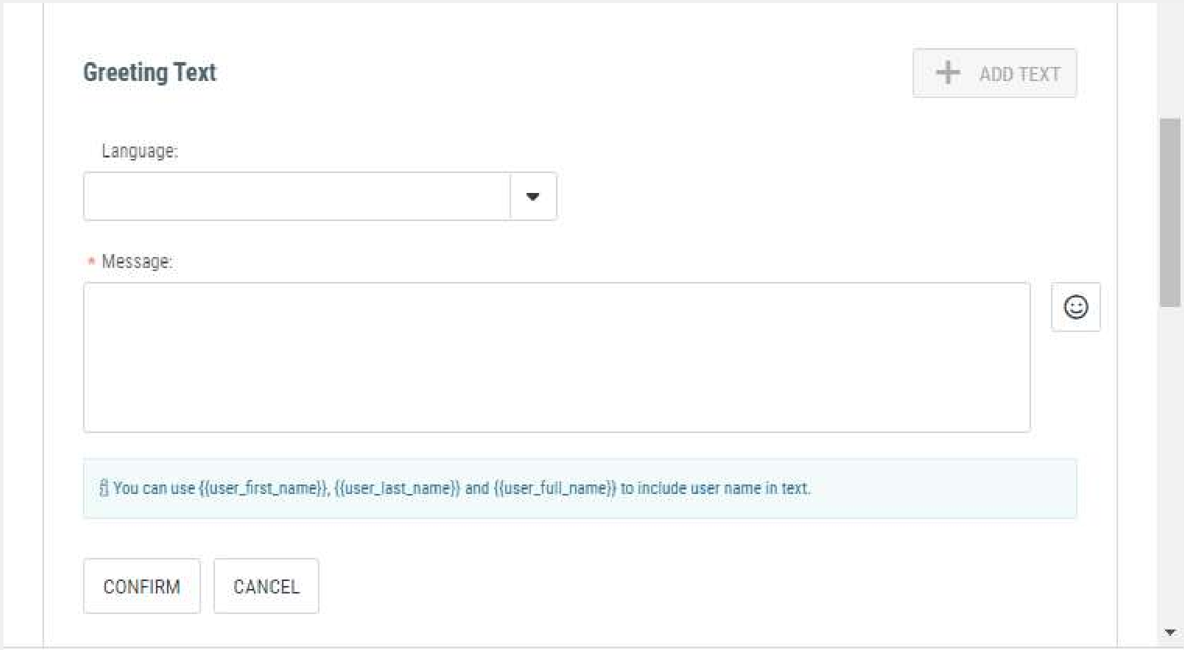
2. Choose the process flow that will be used for Messenger and configure the bot parameters:



Inactivity Time: time in minutes or hours in which the conversation will be closed automatically if no messages were received from the client.

Postback: message that will be received in the process flow event if the "Start Button" option is enabled.

3. Includes the text that the client will see when opening a conversation with the fanpage for the first time, using the "Add text" button:



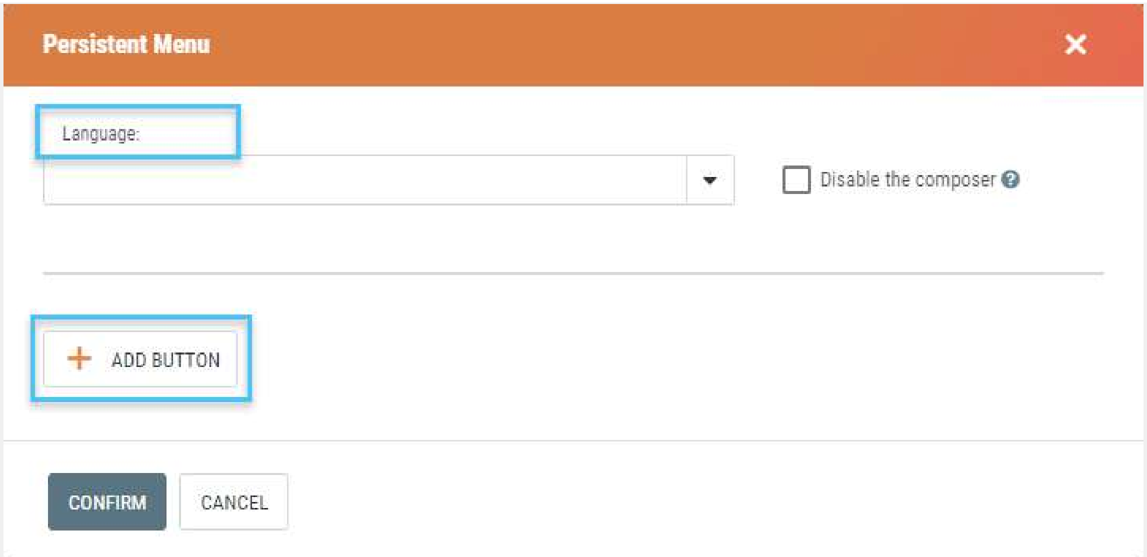
Language: language in which the message is written. At least one message must be written for the default language.

Message: Message that the client will see when they open the Messenger conversation for the first time. First name, full name, or last name variables can be included.

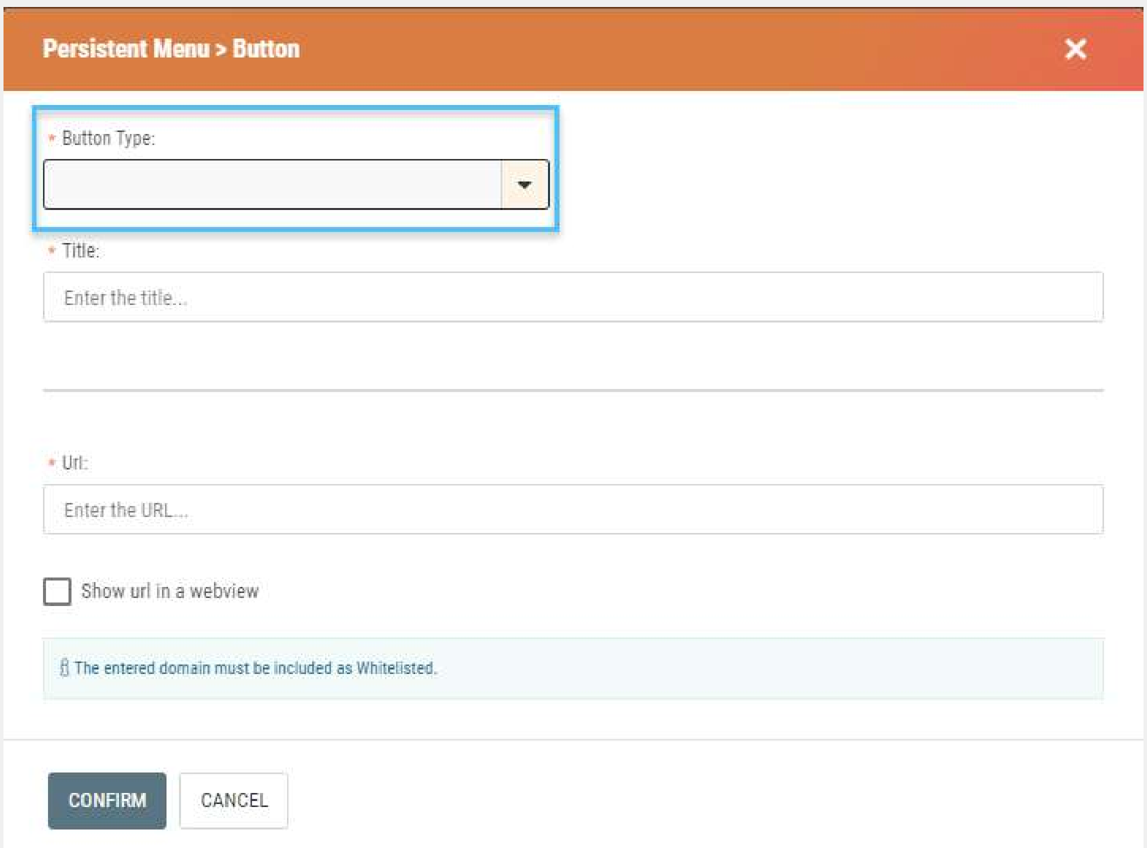
4. From the "Add menu" button, create the drop-down menu options that the client will have available during the Messenger conversation with the fanpage:

To create a menu:

a. Choose the menu language (one must be created for the default language) and add the buttons available to the client:



b. Select the type of button to configure:



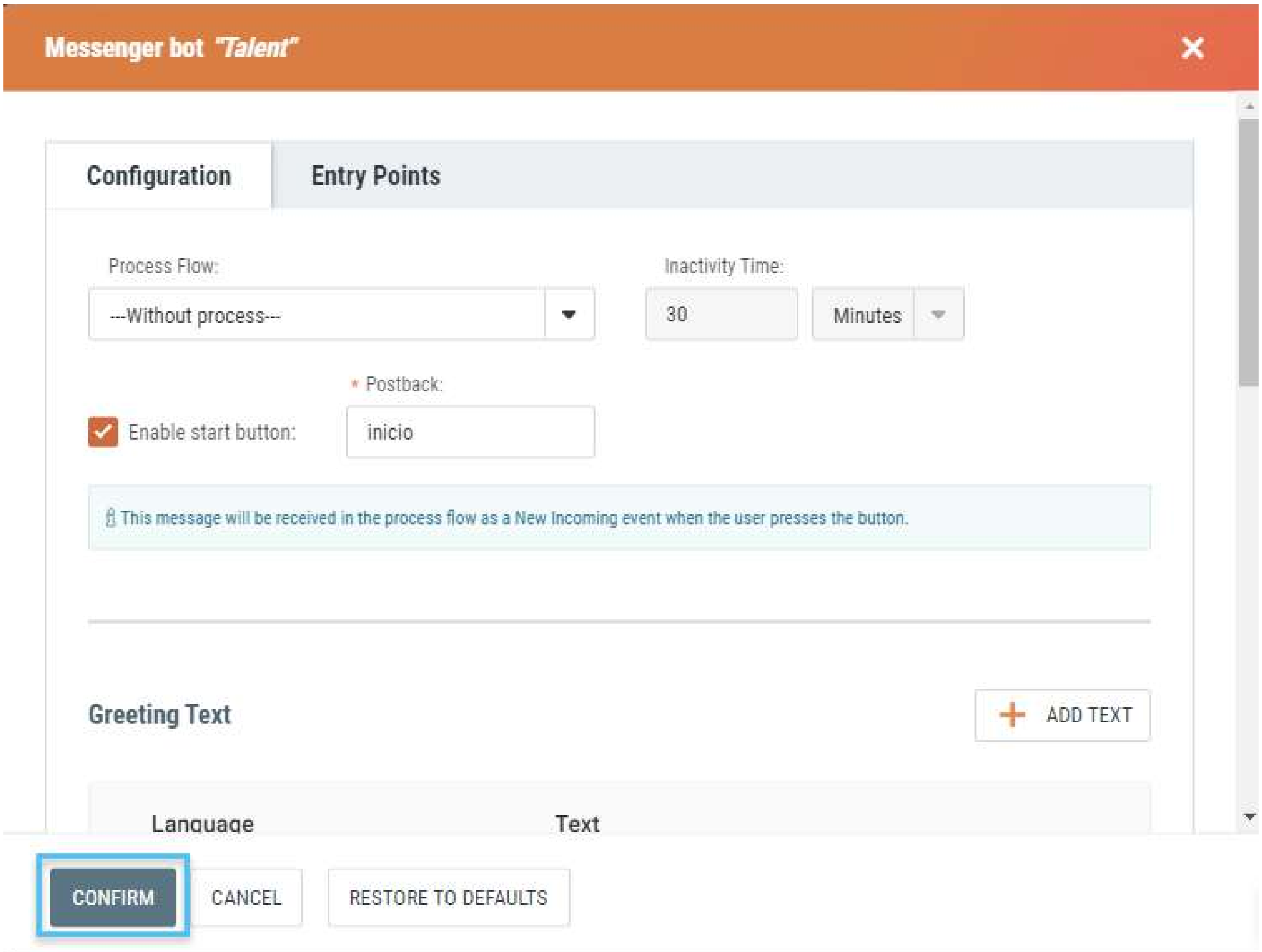
URL: by clicking this button, the client will be redirected to the linked page.

Status: action of the process flow to be executed. The status of the flow to which it corresponds must be indicated.

Sub menu: menu option that will lead to a new level of options (with a status or a new sub menu). This must contain at least one status to select at the last level.

You can create more than one button that execute different types of actions.

5. To save your Messenger bot settings, click "Confirm":



Related Articles

- User search
- How to set up Messenger messaging
- How to associate a YouTube account
- How to associate an application from Google Play Store
- How to associate an application from the App Store

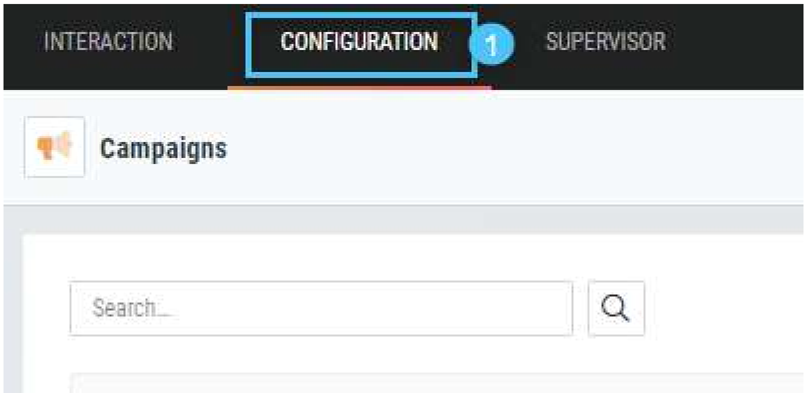
How to associate a Twitter account

Associating a Twitter account with a campaign allows you to manage from i6 all direct messages and mentions that contacts make about that account.

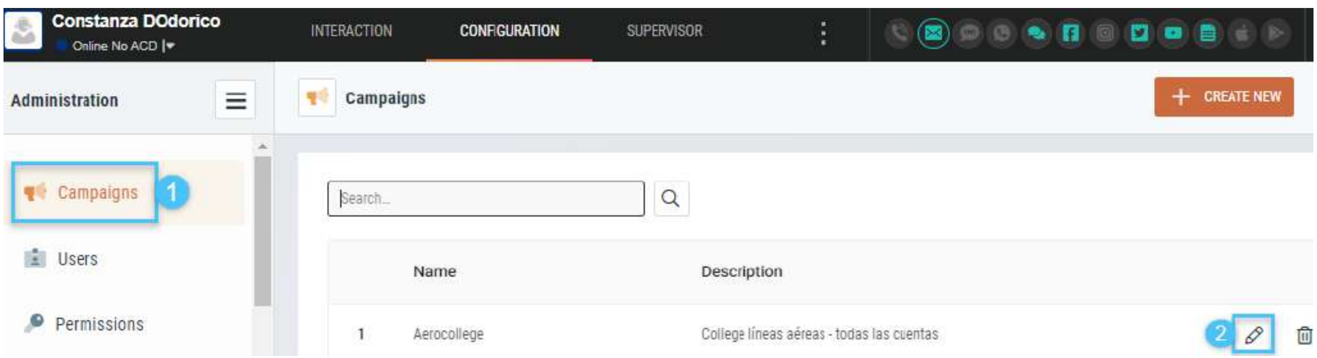
Several Twitter accounts can be associated with the same campaign, depending exclusively on the operation of the Contact Center.

To associate a Twitter account with a campaign:

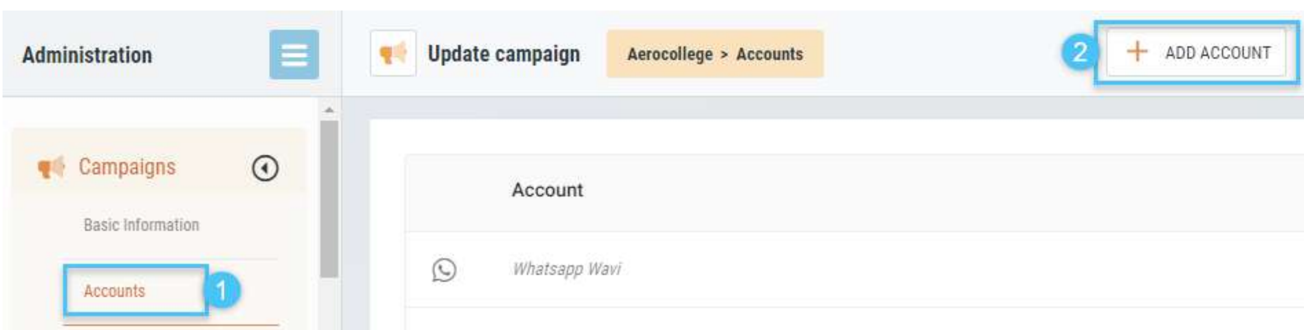
1. Go to the "Configuration" tab:



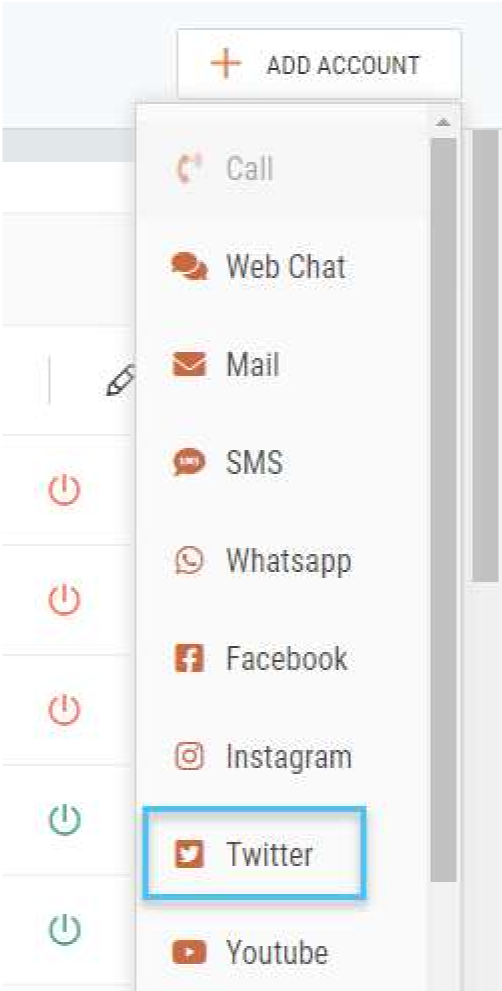
2. Click on the "Campaigns" section 1 and then click the "Edit" button of the campaign to which you will associate the account 2 :



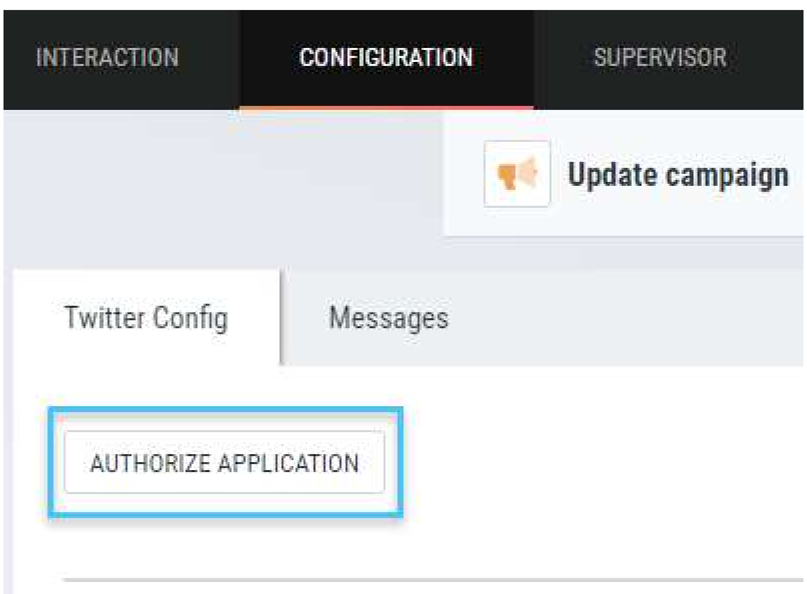
3. Click on the "Accounts" section of the Campaign 1 and then click the button "NEW ACCOUNT" 2 :



4. Select the account type "Twitter":

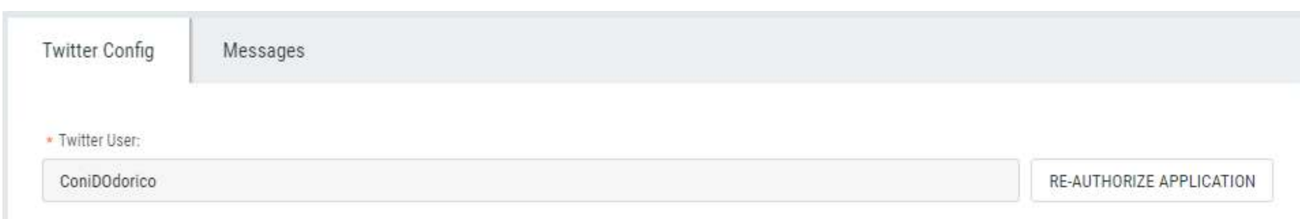


5. Authorize i6 to use the Twitter account, for that you must click the button "Authorize application":



6. In the window that will be displayed, enter the Twitter account data 1 and then click the button "Authorize app" 2 :

7. It will be shown with a "*check*" if the account was authorized correctly and the "Authorize Application" button changes to "Re-authorize Application", which must be clicked if you want to re-authenticate the account. The "Twitter Username" field shows the name of the associated Twitter user.



8. The required data on the distribution of interactions and their main language must be specified:

Distribution: criteria by which the interactions that come from this account will be distributed to the operators.

Click here to expand...

Circular: assigns the interaction to the operator which has been idle for the most time.

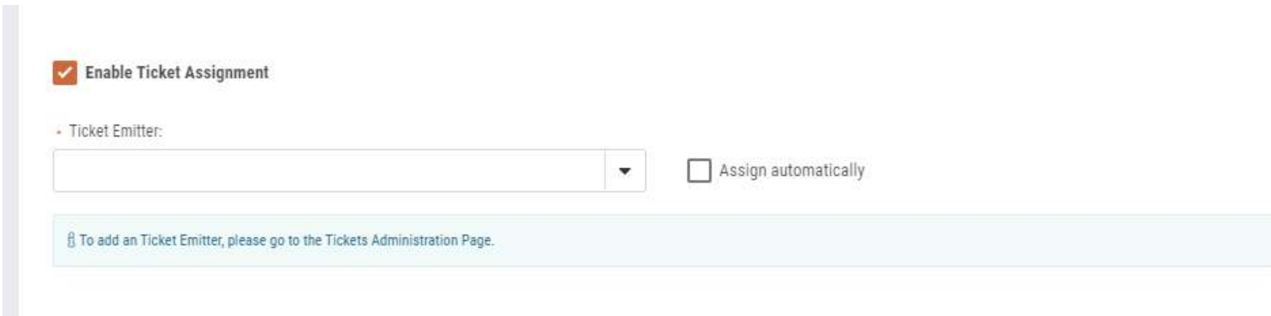
Queue: sends the new interactions to the campaign's queue to be taken or assigned manually.

Skill: the interactions will be assigned to the highest qualifying operator in terms of the skills necessary for the campaign; to choose between operators with the same skill score, the system distributes the interaction as the "Circular" algorithm behaves. If Skill is selected, you will have to set up the agents' skills in order to enable the system to evaluate them for distribution

Priority: defines the priority of the mails of this account in respect to the communications coming from others; the higher the number, the higher the priority.

Language: the operators can make use of the spell checker, which enables when the interaction is being responded. If the system is not able to automatically identify the interaction language, it will consider the one entered in this field.

9. **Attention Level:** You will be able to select from among the *Attention Levels* previously created, the one most appropriate for the operation of this account.
10. **Ticket manager:** You can enable *Tickets Management*to manually or automatically assign tickets to the interactions associated with this account, and you can also select a previously configured ticket issuer.



Assign tickets: if you check this box, you will be enabling the option to assign tickets to the interactions belonging to this account.

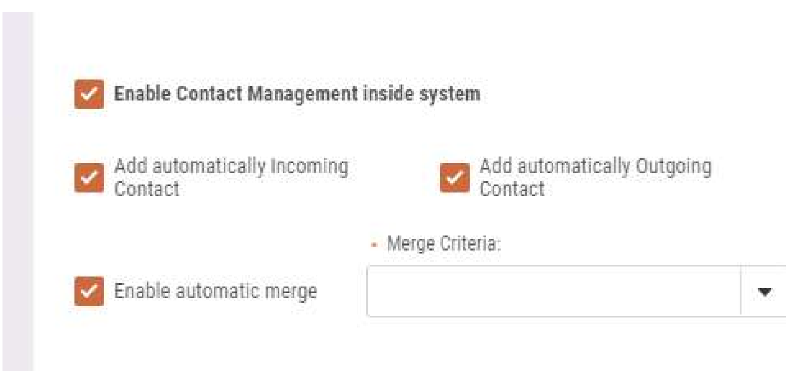
Automatic: if this box is checked, the tickets will be assigned automatically.

***Ticket issuer:**

Click here to expand...

You will need to select a previously configured ticket issuer, see How to create an issuer.

11. **Contact management:** by enabling "Contact management" you will be able to create a new contact with each interaction, and if you wish, the system will do so automatically, both for inbound and outbound interactions. You can also define a criterion for saving the contact data:



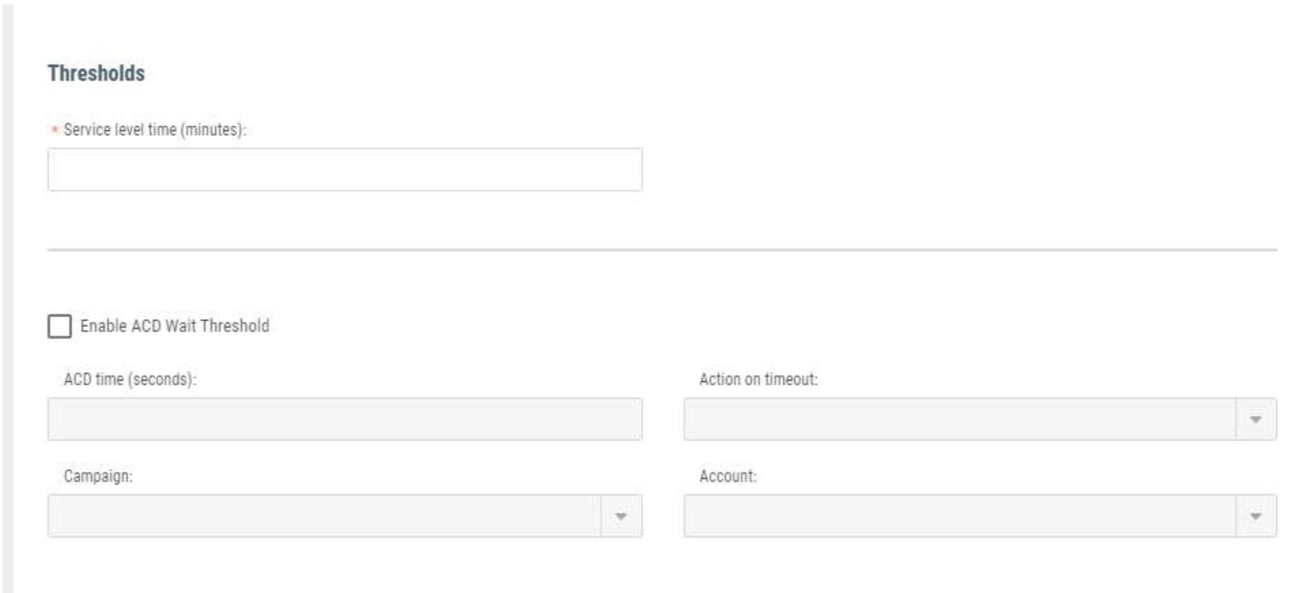
Contact management: if you check this box, you will be enabling the option to create a new contact with each interaction.

Auto Add Contact: if you check these boxes, the system will automatically create a new contact for each inbound and/or outbound interaction. *If it is not checked, contacts will be created manually.*

Automatic unification: after checking this box, you must define the criteria for saving the contact data. You can either keep the contact data already stored, or update the data in each new interaction.

12. **Thresholds:**

This information is not specific to the account but will be common to all accounts in the channel. Editing from here will only be possible if the account being defined is the first of its type, otherwise they will be read-only fields. To edit the channel thresholds, read: "How to edit the general channel settings".



Thresholds: here you specify the time **thresholds** for different service and operational actions.

Service Level: maximum answer time for the communication to be considered to have been attended within the desired Service Level.

13. After completing all the required fields, press the "SAVE ACCOUNT" button to continue.
14. To cancel the operation without saving the data entered, click the "CANCEL ACCOUNT" button.

Understand how Twitter Proxies work by reading the following article: How Twitter Proxies Work.

Related Articles

- Cómo funcionan los Proxies de Twitter en OCC
- Cómo asociar una cuenta de Correo
- Cómo crear una cuenta de Llamadas
- Cómo crear una cuenta de Formulario de contacto
- Cómo crear una cuenta de Llamadas (con Telefonia Nativa)

How to associate a YouTube account

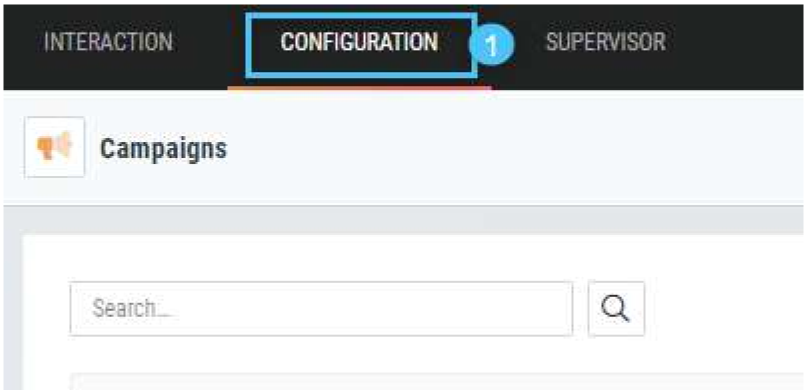
Associating a YouTube account with a campaign allows you to manage from OCC all the interactions that contacts have with the different videos of the channel or live broadcasts.

The interactions can be: comments on the post, comments on the wall, replies to comments and private messages

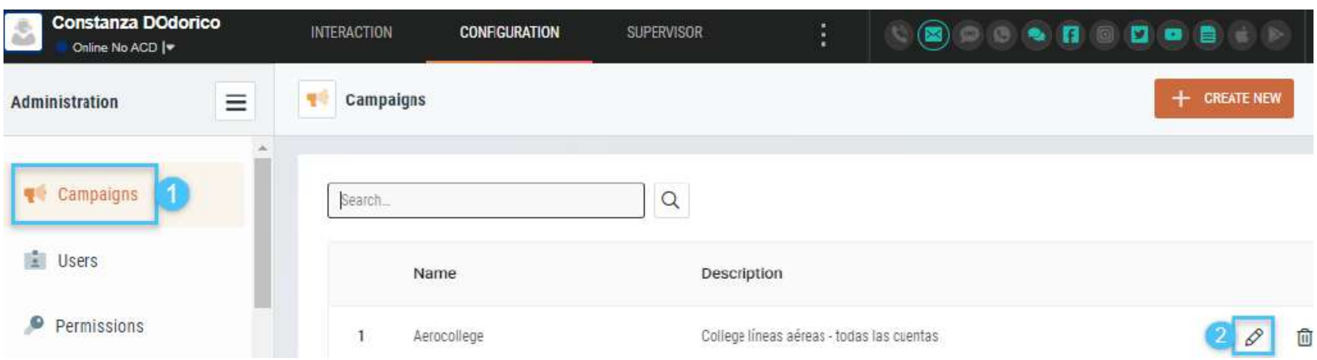
Several YouTube accounts can be associated with the same campaign, depending exclusively on the operation of the Contact Center.

To associate a YouTube account with a campaign:

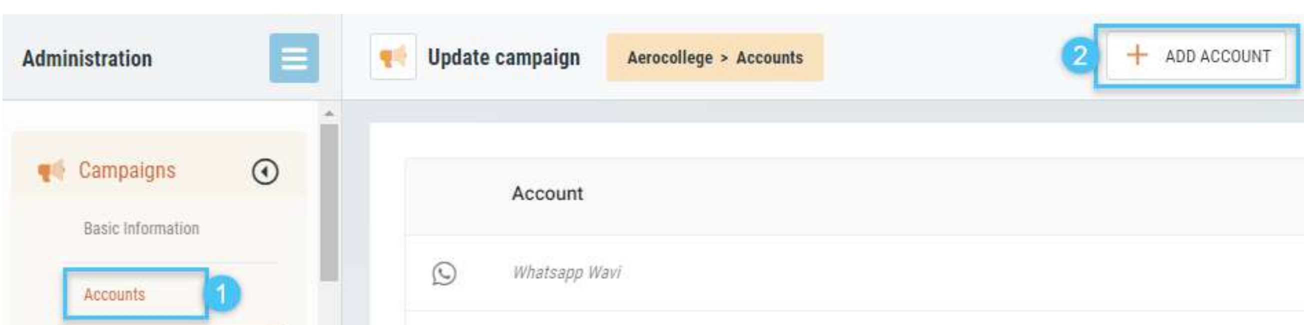
1. Go to the "Configuration" tab:



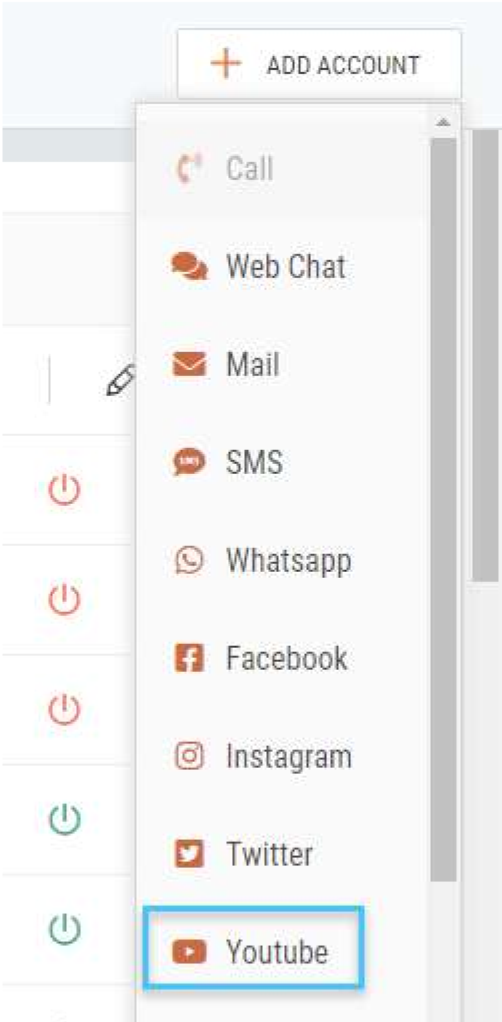
2. Click on the section "Campaigns" 1 and then click the "Edit" button of the campaign to which you will associate the account 2 :



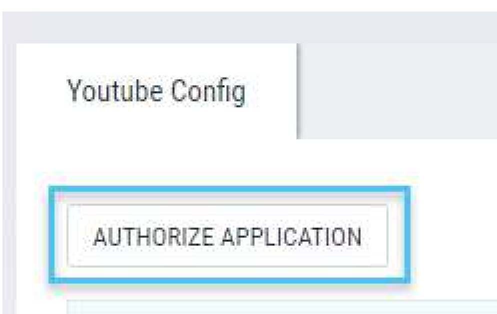
3. Click on the "Accounts" section of the Campaign 1 and then click the button "Add Account" 2 :



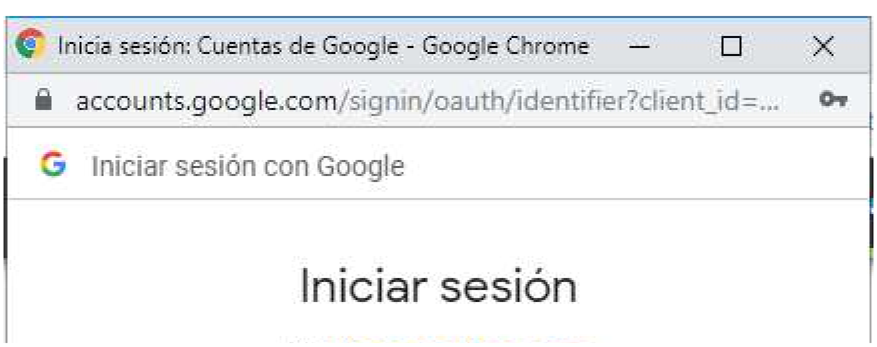
4. Select the account type "YouTube":



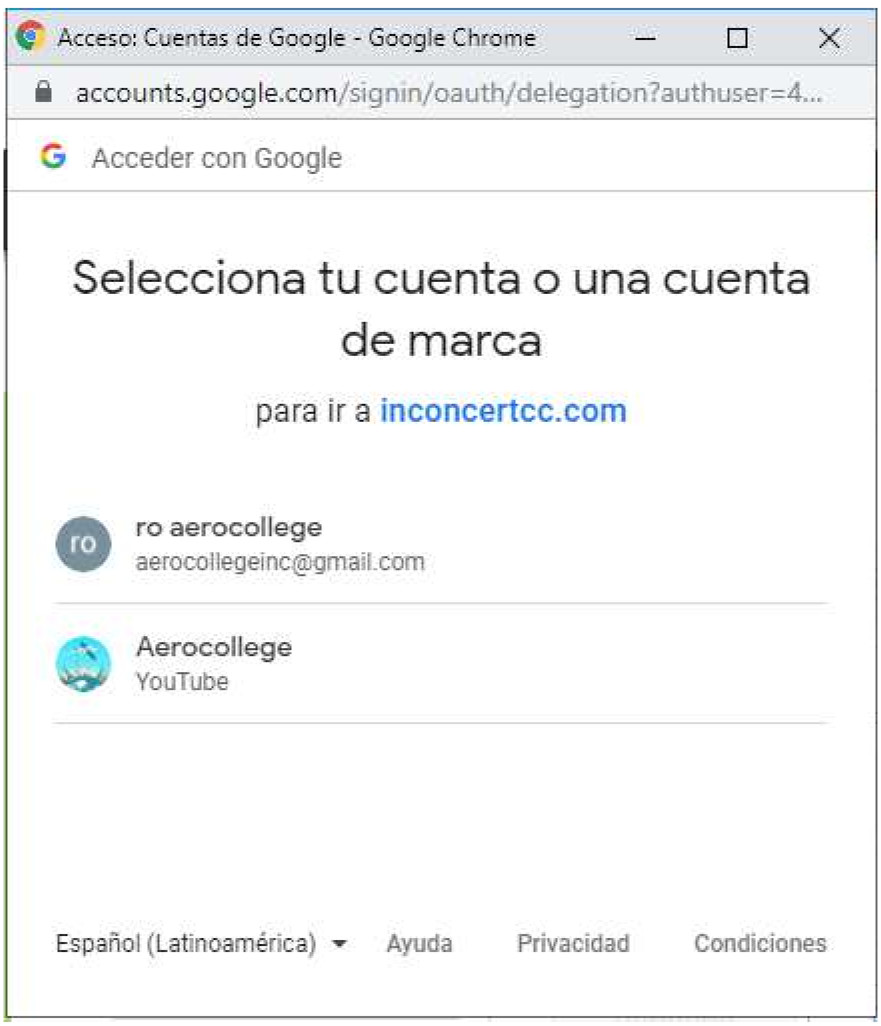
5. You must authorize OCC to use the account that you will associate, for that click the "Authorize application" button:



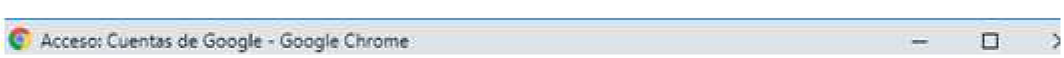
6. Enter the details of the Gmail account associated with the YouTube channel:

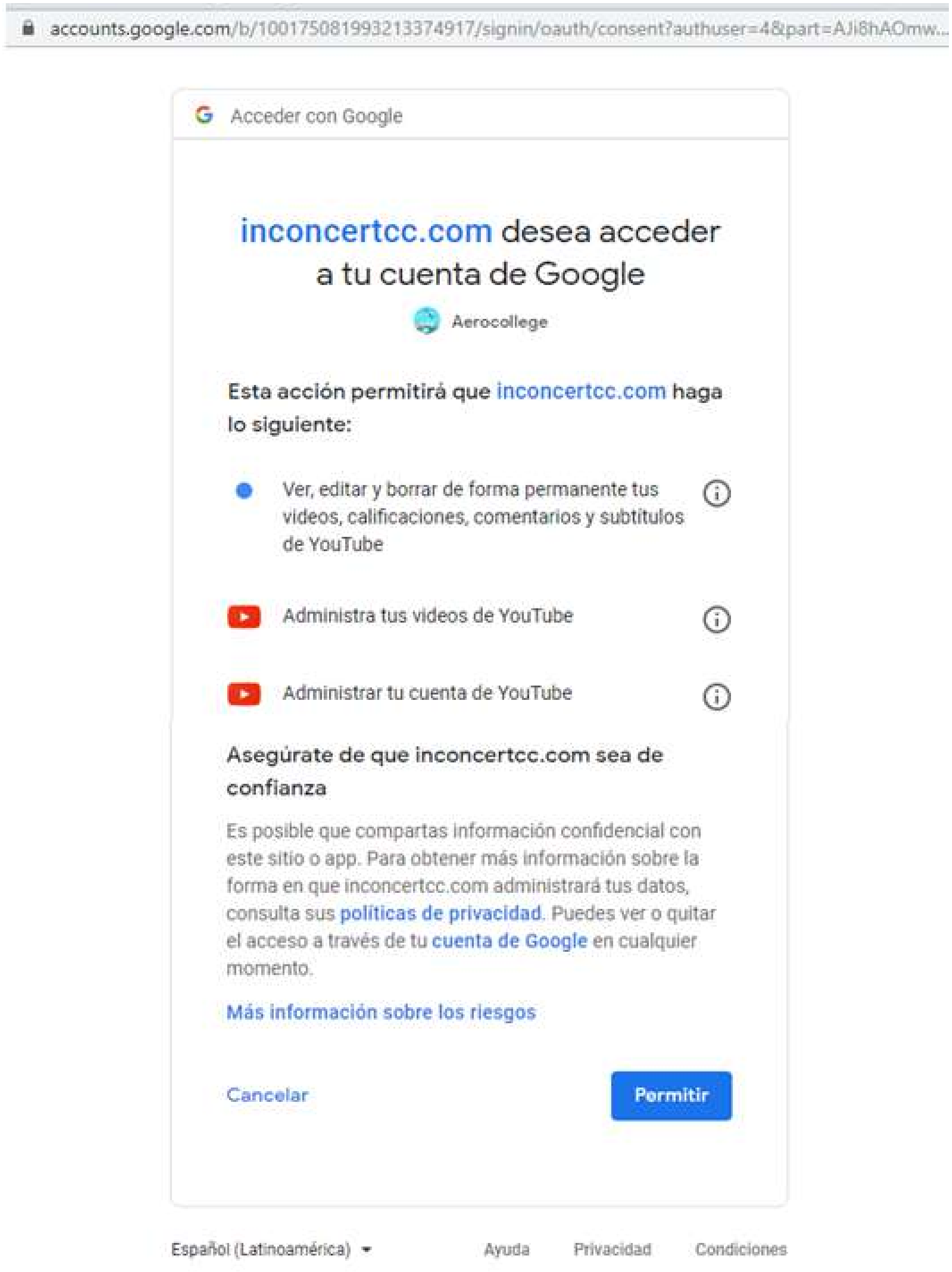


7. Select the channels that you will add to OCC:

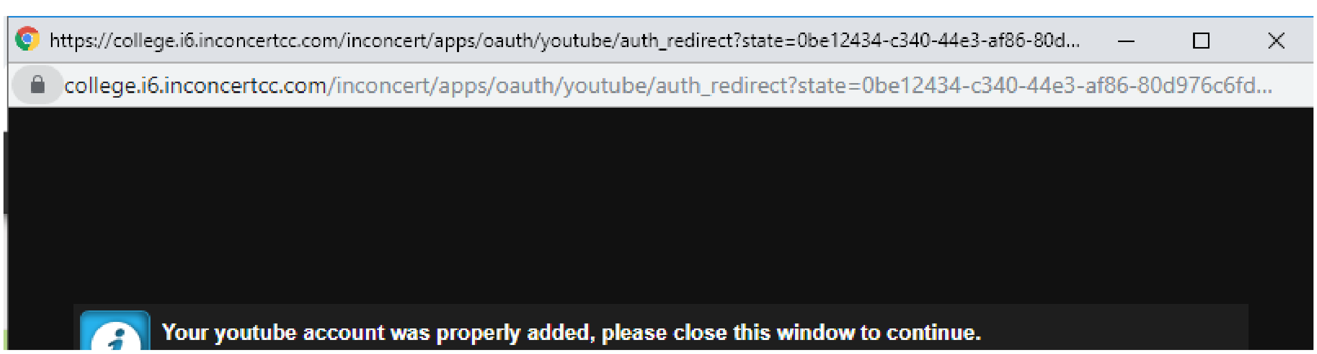


8. It is necessary to accept the actions that OCC can take on the account:

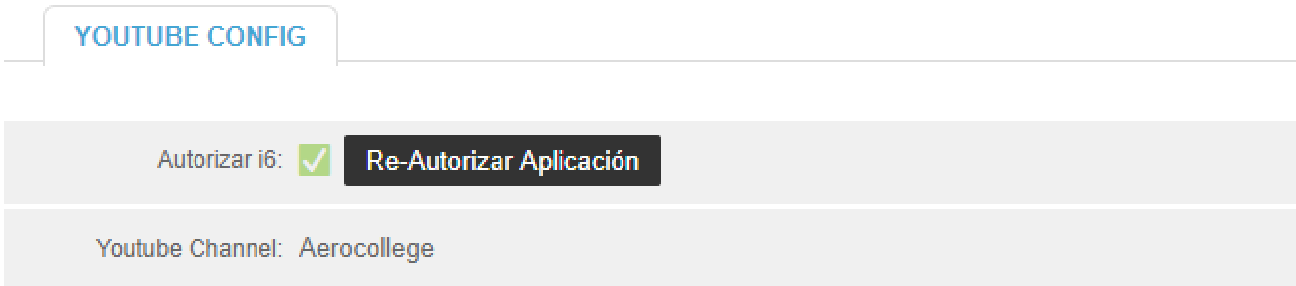




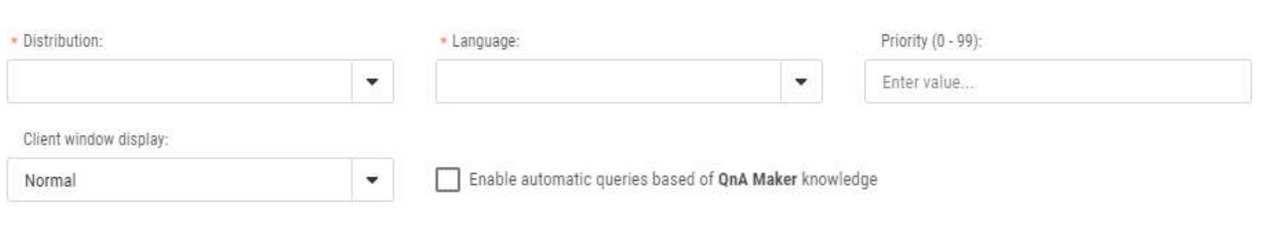
9. When this screen is displayed, the authorization is complete:



10. It will be shown with a "*check*" if the account was authorized correctly and the "Authorize Application" button changes to "Re-authorize Application", which must be clicked if you want to re-authenticate the account. The name of the associated channel is displayed in the "YouTube Channel" field:



11. The required data on the distribution of interactions and their main language must be specified:



Distribution: criteria by which the interactions that come from this account will be distributed to the operators.

Click here to expand...

Circular: assigns interactions to the operator who has been in the Available state for the longest time.

Queued: send new interactions to the campaign queue; to be taken or assigned manually.

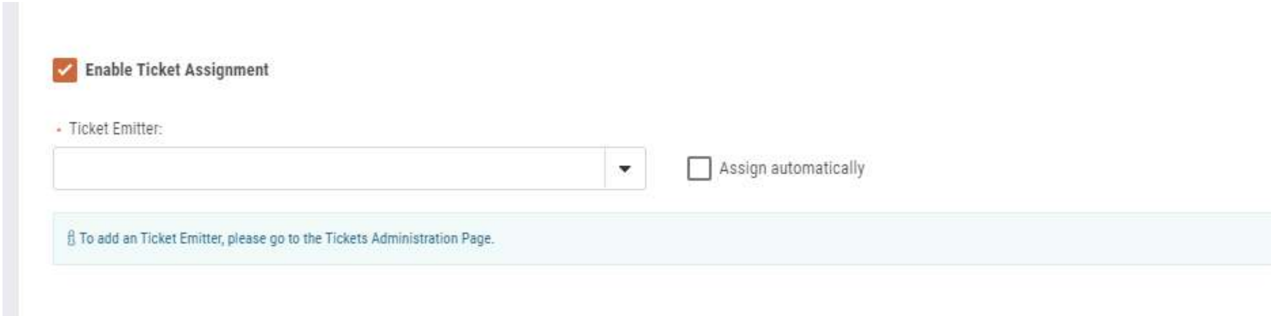
Skill: the interactions will be assigned to the operators who have the highest ratings in terms of the skills required for each campaign; the "Circular" algorithm is applied to select between operators who receive the same skill score. If you select this, you must indicate the agent skills that you want to consider in the distribution

Priority: defines the priority of the interactions of this account with respect to the communications that come from others; the higher the number that is entered, the higher the priority.

Language: operators have a spell checker that is enabled when they are responding to an interaction. If the system cannot automatically identify the language of the interaction, it takes the one which has been set in this field.

12. **Attention Level:** You will be able to select from among the *Attention Levels* previously created, the one most appropriate for the operation of this account

13. **Ticket Management:** You can enable *Tickets Management* to manually or automatically assign tickets to the interactions associated with this account, and you can also select a previously configured ticket issuer.



Assign tickets: if you check this box, you will be enabling the option to assign tickets to the interactions belonging to this account.

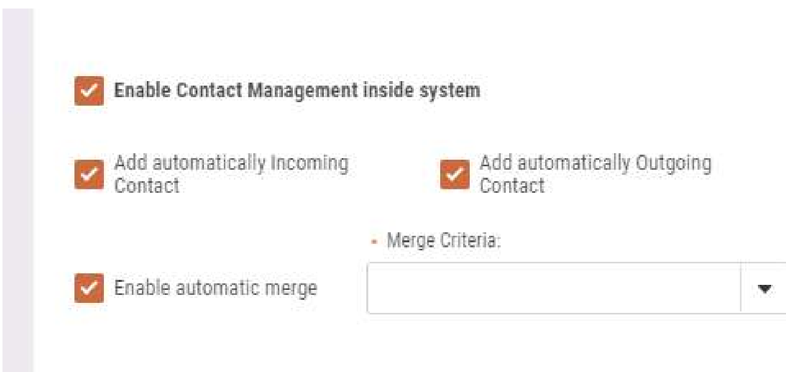
Automatic: if this box is checked, the tickets will be assigned automatically.

***Ticket issuer::**

Click here to expand...

You will need to select a previously configured ticket issuer, see How to create a ticket issuer.

14. **Contact management:**by enabling "Contact management" you will be able to create a new contact with each interaction, and if you wish, the system will do so automatically, both for inbound and outbound interactions. You can also define a criterion for saving the contact data:

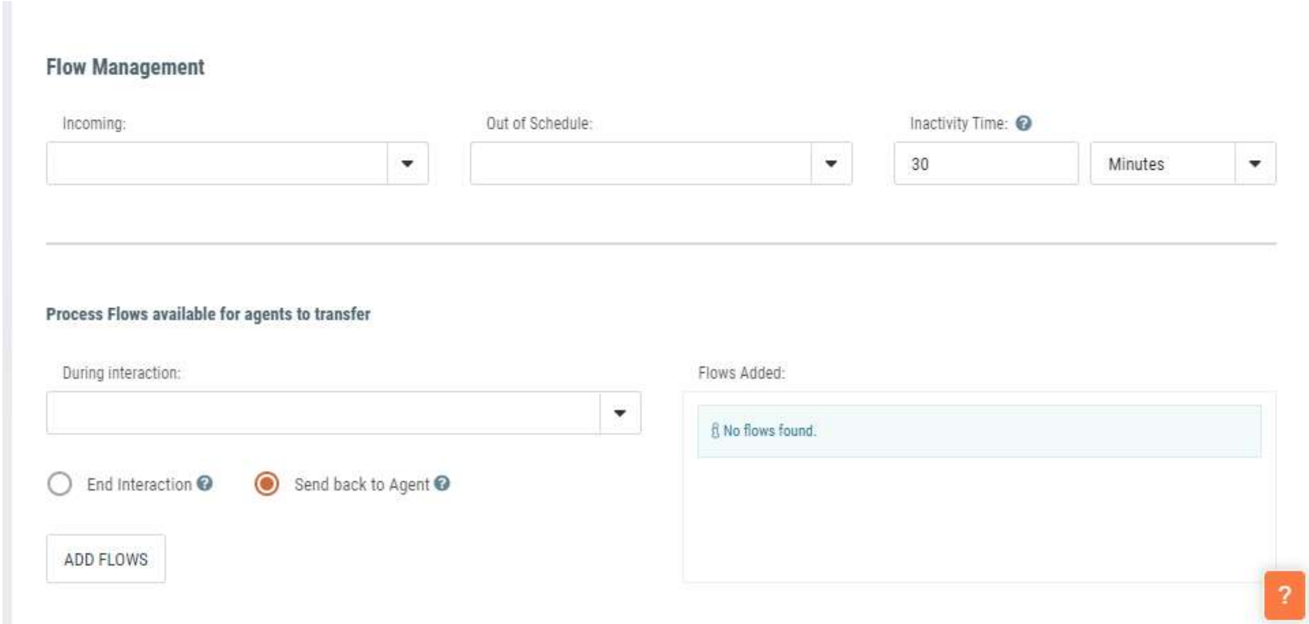


Contact management: if you check this box, you will be enabling the option to create a new contact with each interaction.

Auto Add Contact: if you check these boxes, the system will automatically create a new contact for each inbound and/or outbound interaction. *If it is not checked, contacts will be created manually.*

Automatic unification: after checking this box, you must define the criteria for saving the contact data. You can either keep the contact data already stored, or update the data in each new interaction.

15. **Flow management:** by checking the box to enable flow management, we can include a bot to interact with the messages received in the channel.



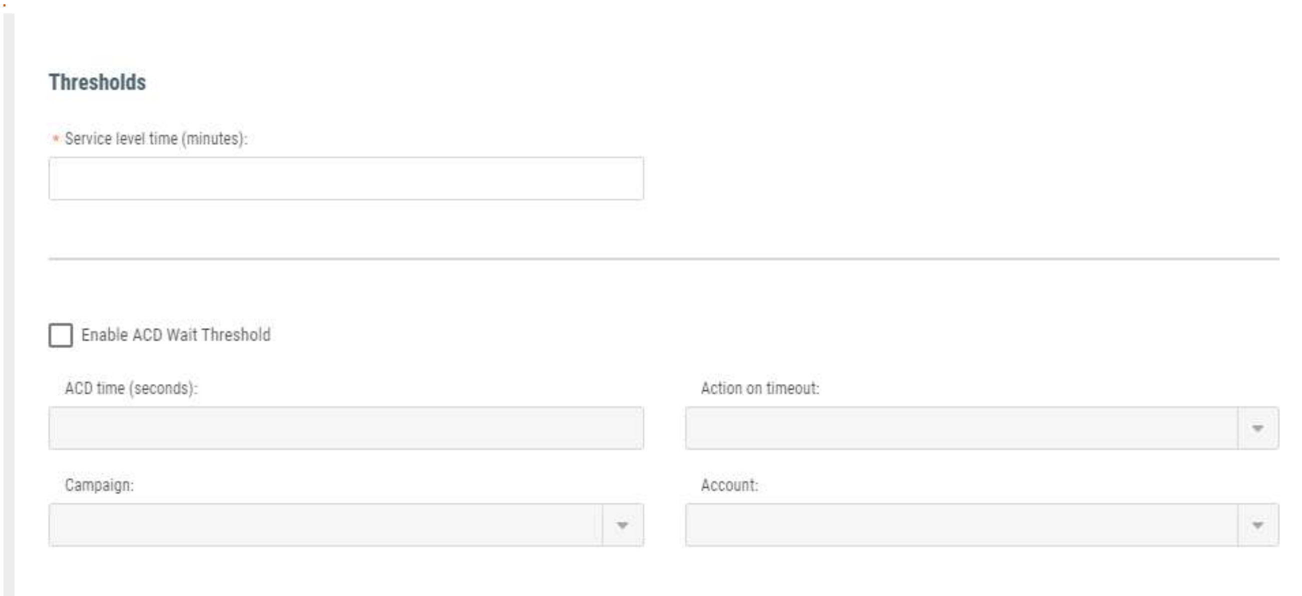
Processes: from the drop-down menu, you will be able to choose the bot that was created for the replies.

Idle time: is the time after which the bot conversation will be closed if the client does not respond.

16. **QnA Maker**: by checking the box, agents will be able to use the QnA knowledge base in YouTube account interactions.

17. **Thresholds:**

    This information is not specific to the account but will be common to all accounts in the channel. Editing from here will only be possible if the account being defined is the first of its type, otherwise they will be read-only fields. To edit the channel thresholds, read: "How to edit the general channel settings".



Thresholds: here you specify the time **thresholds** for different service and operational actions.

Service Level: maximum answer time for the communication to be considered to have been attended within the desired Service Level.

18. After completing all the required fields, click the "SAVE" button to continue..
19. To cancel the operation without saving the entered data, click the "CANCEL" button.

Related Articles

- User search
- How to set up Messenger messaging
- How to associate a YouTube account
- How to associate an application from Google Play Store
- How to associate an application from the App Store

App Store Configuration

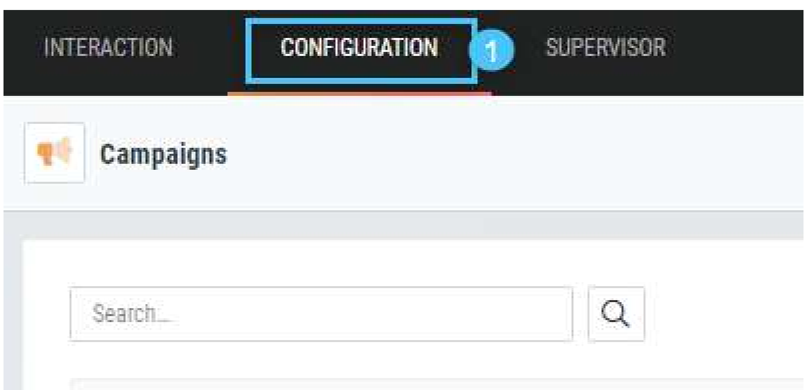
- How to associate an application from Google Play Store
- How to associate an application from the App Store

How to associate an application from Google Play Store

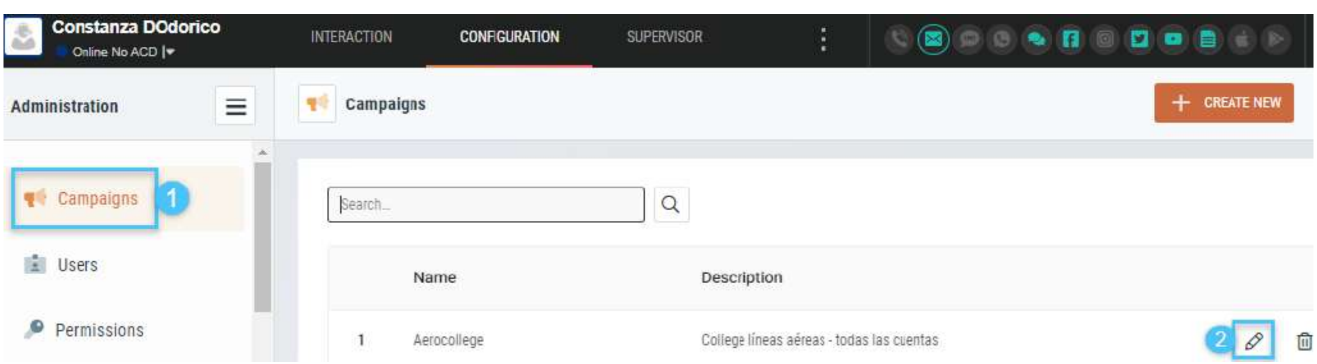
Associating a Google Play Store application account with a campaign allows you to manage from OCC the list of reviews received.

Follow the steps below to associate an application from the Google Play Store:

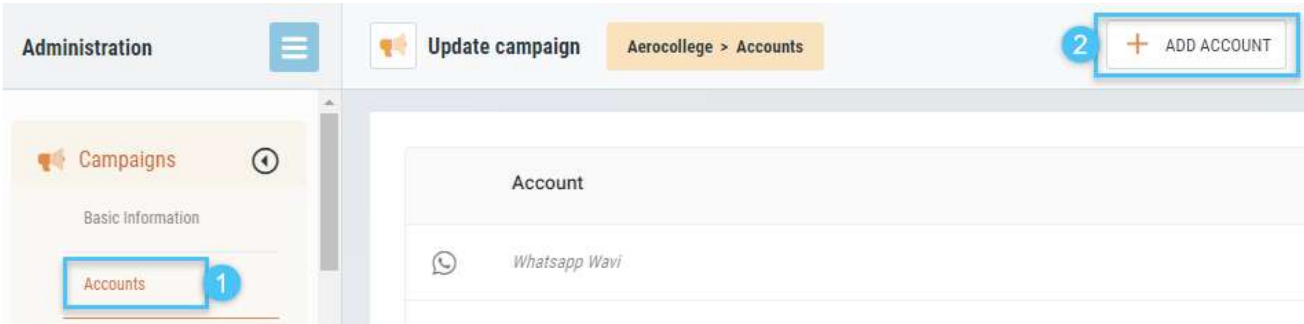
1. Go to the "Configuration" tab:



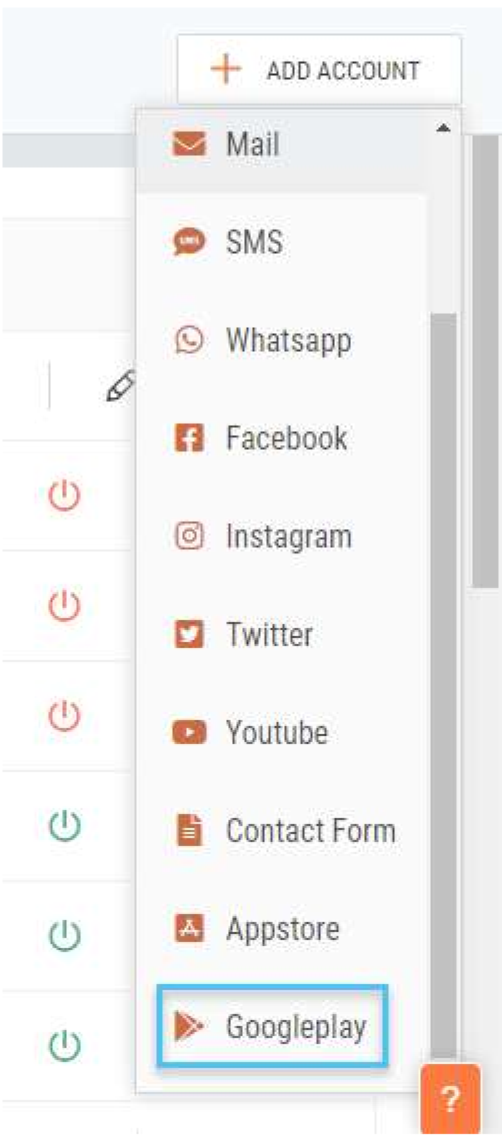
2. Click on the "Campaigns" section  and then click the "Edit" button of the campaign to which you will associate the account  :



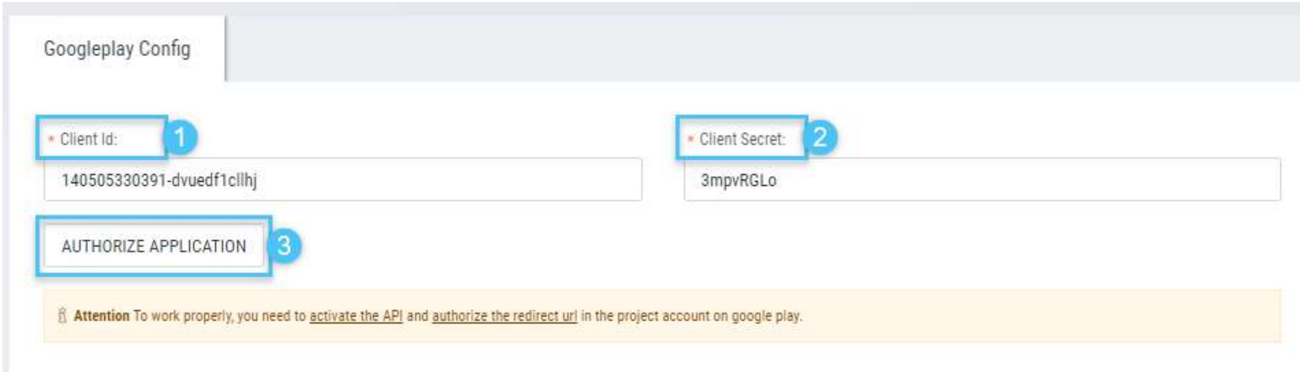
3. Click on the "Accounts" section of the Campaign 1 and then click the button "Add Account" 2 :



4. Select the account type ***"Googleplay":***



5. The following configuration screen will be displayed where ***you must set the following data:***



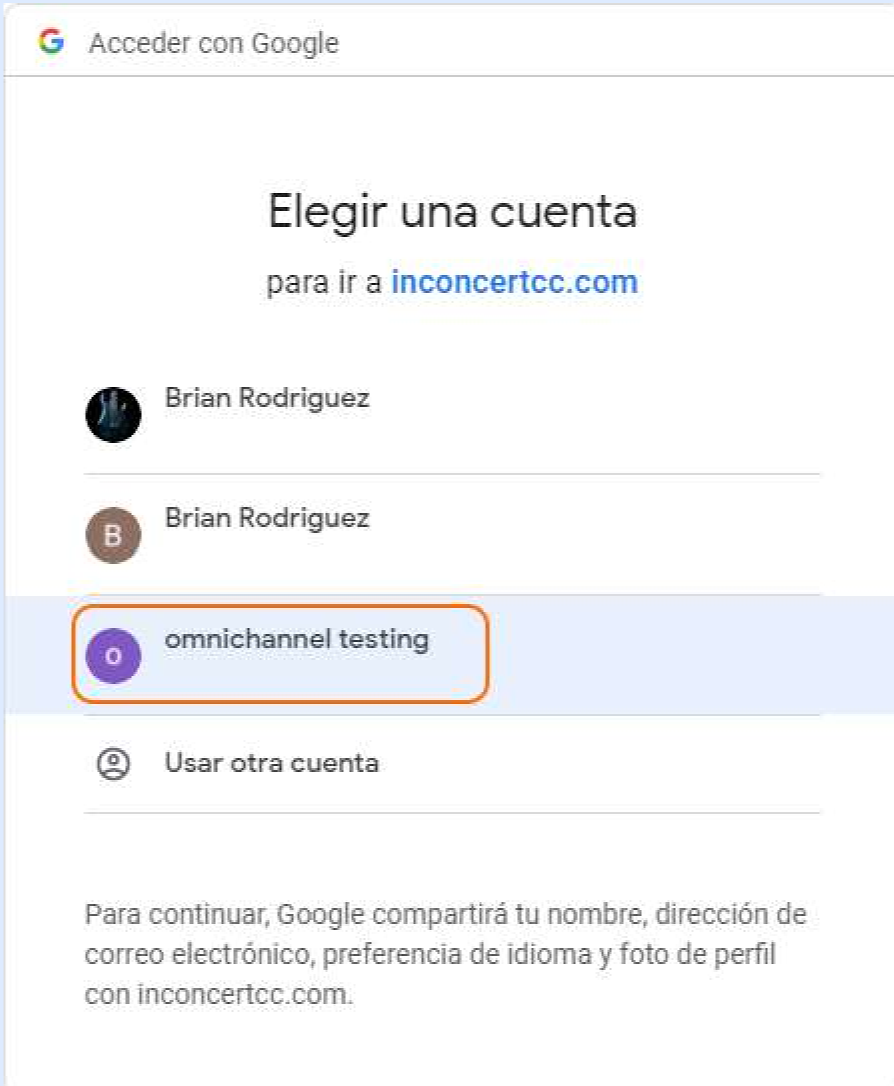
1 You will need to enter the Client Id. To obtain the Client Id, the developer must create a project associated with their account (https://developers.google.com/android-publisher/authorizationelopers.google.com/android-publisher/authorization) and also register a web application OAuth key associated with the project created (https://developers.google.com/identity/protocols/OAuth2WebServer).

2 You will need to enter the Client Secret. To obtain the Client Secret, the developer must create a project associated with their account (https://developers.google.com/android-publisher/authorization) and also register a web application OAuth key associated with the project created (https://developers.google.com/identity/protocols/OAuth2WebServer).

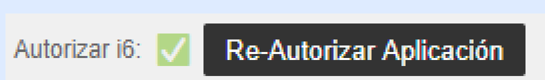
3 Click on the "Authorize Application" button.

When you do this, the following window will be displayed where you must choose with which account you want to associate the project, or you can enter a new one.

The account to authorize the application does not have to be that of the developer, but it ***must have the necessary permissions for the application to associate***



Once authorized, the following check will be displayed:



6. The required data on the distribution of interactions and their main language must be specified:

Distribution: criteria by which the interactions that come from this account will be distributed to the operators.

Click here to expand...

Circular: assigns interactions to the operator who has been in the Available state for the longest time.

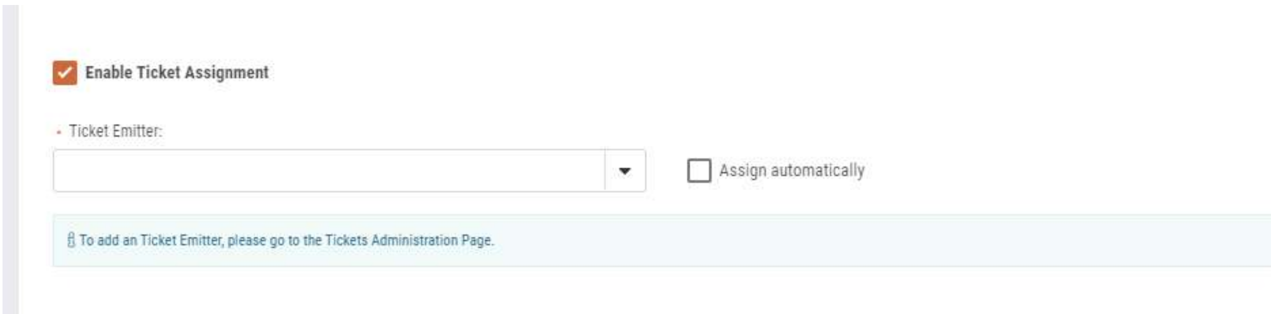
Queued: send new interactions to the campaign queue; to be taken or assigned manually.

Skill: the interactions will be assigned to the operators who have the highest ratings in terms of the skills required for each campaign; the "Circular" algorithm is applied to select between operators who receive the same skill score. If you select this, you must indicate the agent skills that you want to consider in the distribution

Priority: defines the priority of the interactions of this account with respect to the communications that come from others; the higher the number that is entered, the higher the priority.

Language: operators have a spell checker that is enabled when they are responding to an interaction. If the system cannot automatically identify the language of the interaction, it takes the one which has been set in this field.

7. **Attention Level:** You will be able to select from among the *Attention Levels* previously created, the one most appropriate for the operation of this account.
8. **Ticket Management:** You can enable *Tickets Management* to manually or automatically assign tickets to the interactions associated with this account, and you can also select a previously configured ticket issuer.



Assign tickets:if you check this box, you will be enabling the option to assign tickets to the interactions belonging to this account.

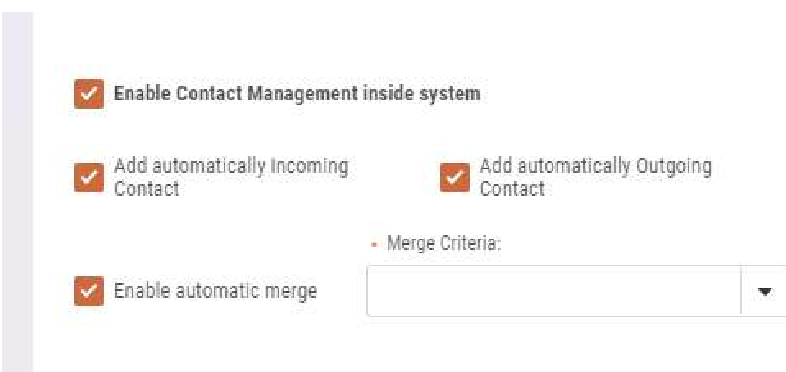
Automatic: if this box is checked, the tickets will be assigned automatically.

***Ticket issuer:**

Click here to expand...

You will need to select a previously configured ticket issuer, see How to create a ticket issuer.

9. **Contact management:**by enabling "Contact management" you will be able to create a new contact with each interaction, and if you wish, the system will do so automatically, both for inbound and outbound interactions. You can also define a criterion for saving the contact data:



Contact management: if you check this box, you will be enabling the option to create a new contact with each interaction.

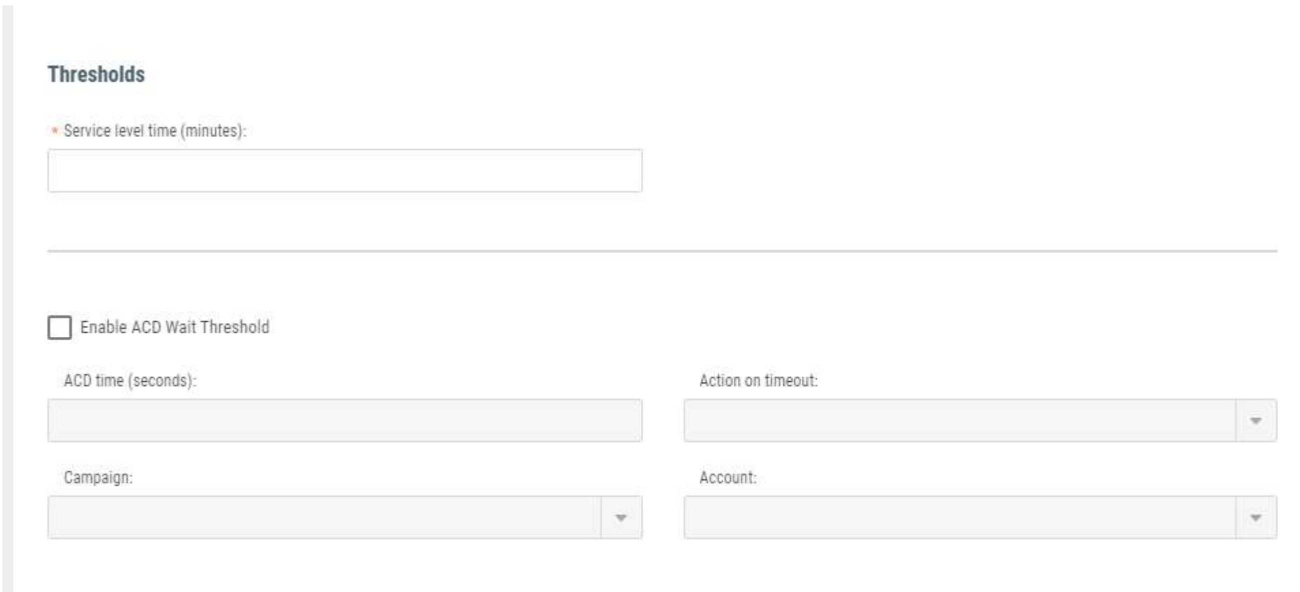
Auto Add Contact: if you check these boxes, the system will automatically create a new contact for each inbound and/or outbound interaction. *If it is not checked, contacts will be created manually.*

Automatic unification: after checking this box, you must define the criteria for saving the contact data. You can either keep the contact data already stored, or update the data in each new interaction.

10. **QnA Maker**: by checking the box, agents will be able to use the QnA knowledge base in YouTube account interactions.

11. **Thresholds:**

    This information is not specific to the account but will be common to all accounts in the channel. Editing from here will only be possible if the account being defined is the first of its type, otherwise they will be read-only fields. To edit the channel thresholds, read: "How to edit the general channel settings".



Thresholds: here you specify the time **thresholds** for different service and operational actions.

Service Level: maximum answer time for the communication to be considered to have been attended within the desired Service Level.

12. After completing all the required fields, click the "SAVE" button to continue

13. To cancel the operation without saving the entered data, click the "CANCEL" button.

Related Articles

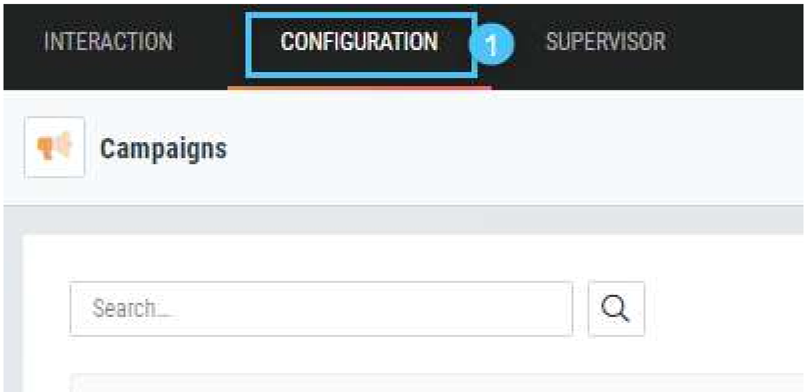
- User search
- How to set up Messenger messaging
- How to associate a YouTube account
- How to associate an application from Google Play Store
- How to associate an application from the App Store

How to associate an application from the App Store

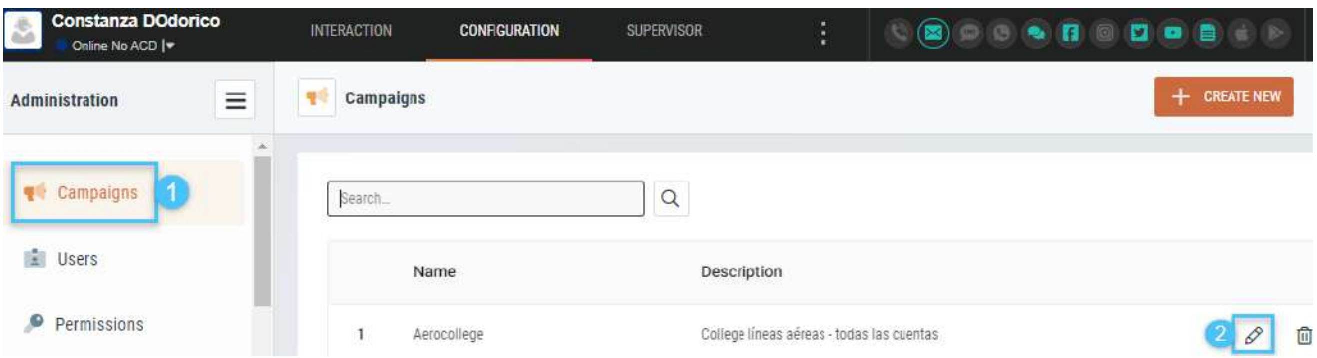
Associating an AppStore application account with a campaign allows you to manage from OCC the list of reviews received.

Follow the steps below to associate an application from the AppStore:

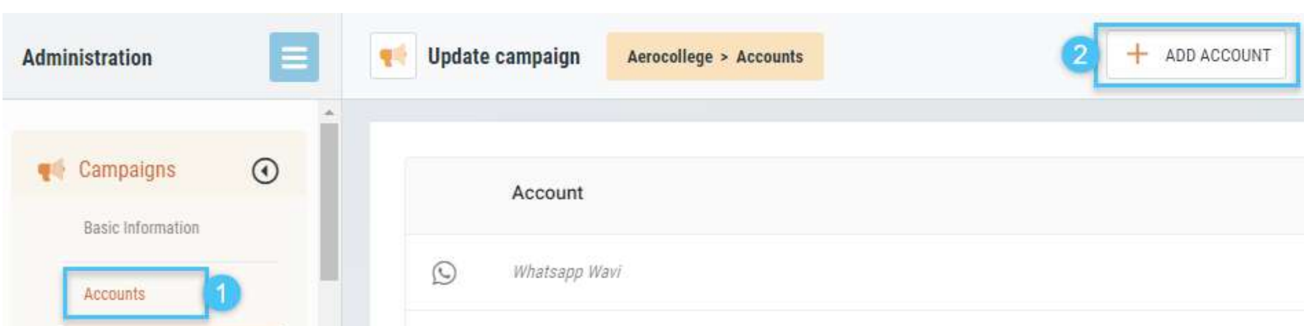
1. Go to the ***"Configuration"*** tab:



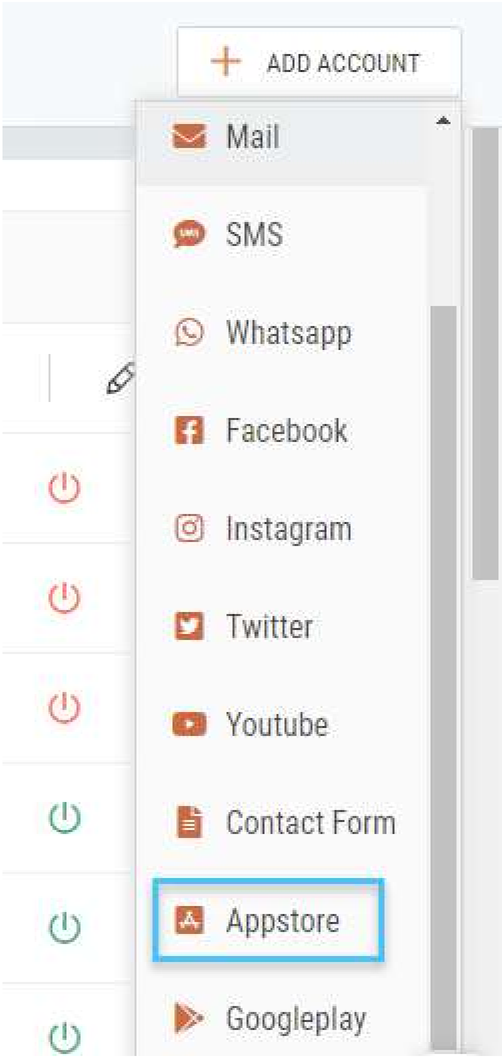
2. *Click on the "Campaigns" section* and then *click the "Edit" button* of the campaign to which you will associate the account :



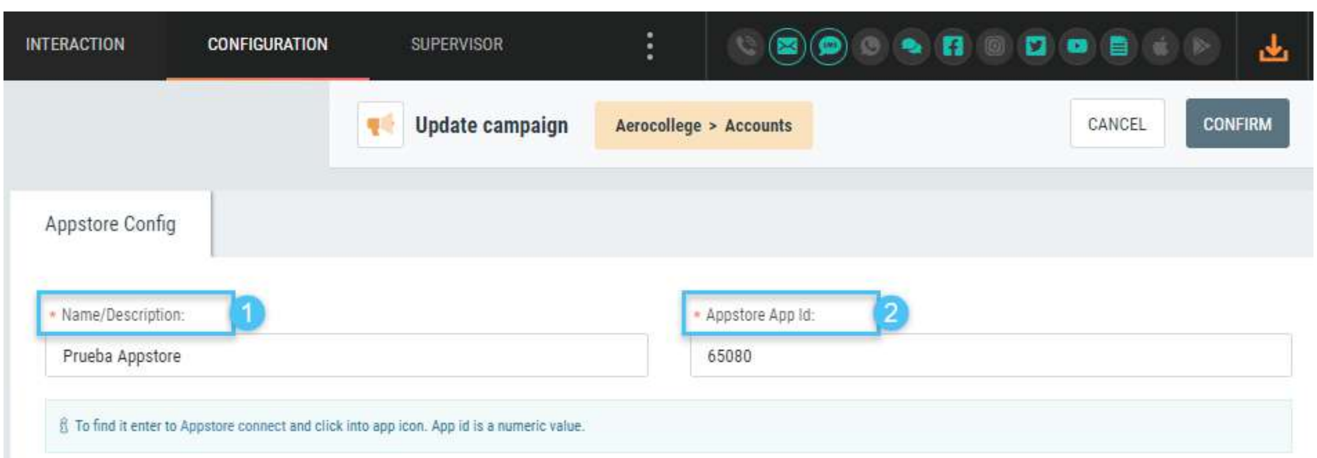
3. Click on the "Accounts" section of the Campaign and then click the button "Add Account" :



4. Select the account type***"Appstore":***



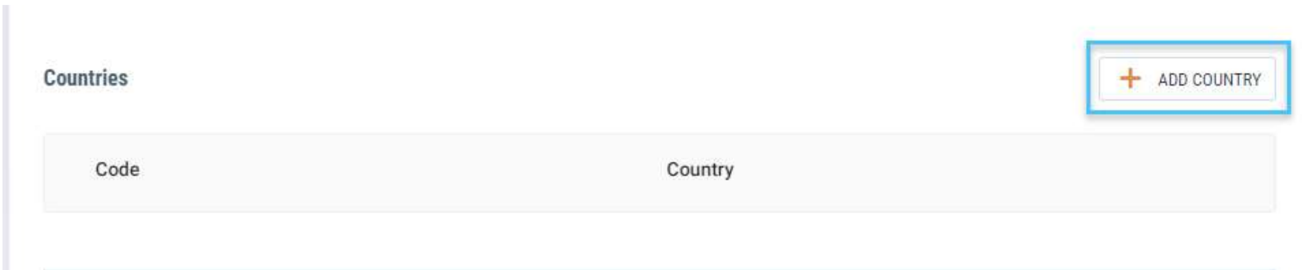
5. *The following screen will be displayed where* ***you must complete the following information:***



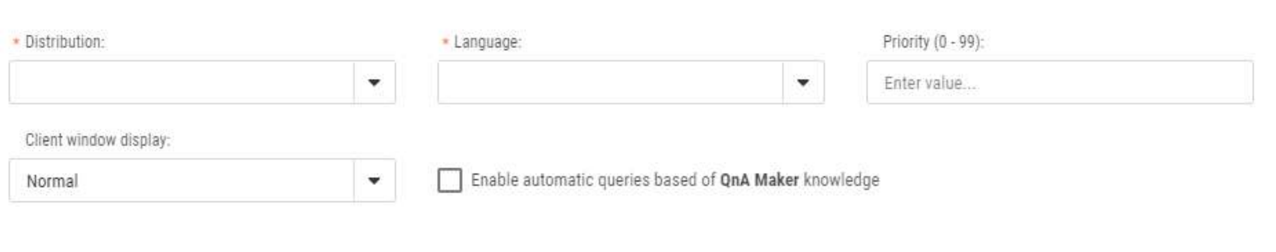
Name/Description: enter the name or description of the App

Appstore App id: enter the App Id (it can be obtained by entering Appstore Connect

6. You will need to ***enter the list of countries*** from which you want to obtain the ratings. For this you must click on the "Add Country" button



7. The required data on the distribution of interactions and their main language must be specified:



Distribution: criteria by which the interactions that come from this account will be distributed to the operators

Click here to expand...

Circular: assigns interactions to the operator who has been in the Available state for the longest time.

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Skill: the interactions will be assigned to the operators who have the highest ratings in terms of the skills required for each campaign; the "Circular" algorithm is applied to select between operators who receive the same skill score. If you select this, you must indicate the agent skills that you want to consider in the distribution

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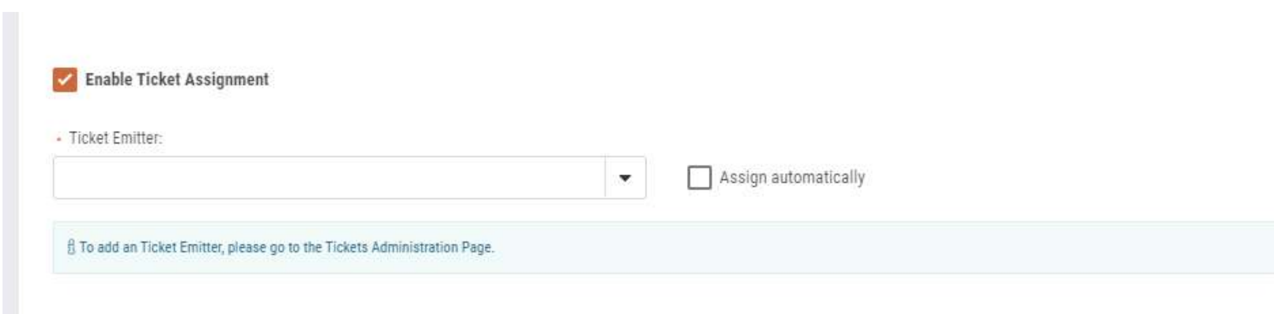
8. **Attention Level:** You will be able to select from among the *Attention Levels* previously created, the one most appropriate for the operation of this account.
9. **Ticket Management:** You can enable *Tickets Management* to manually or automatically assign tickets to the interactions associated with this account, and you can also select a previously configured ticket issuer.



Assign tickets: if you check this box, you will be enabling the option to assign tickets to the interactions belonging to this account.

Automatic: if this box is checked, the tickets will be assigned automatically.

Ticket issuer:

Click here to expand...

You will need to select a previously configured ticket issuer, see How to create a ticket issuer.

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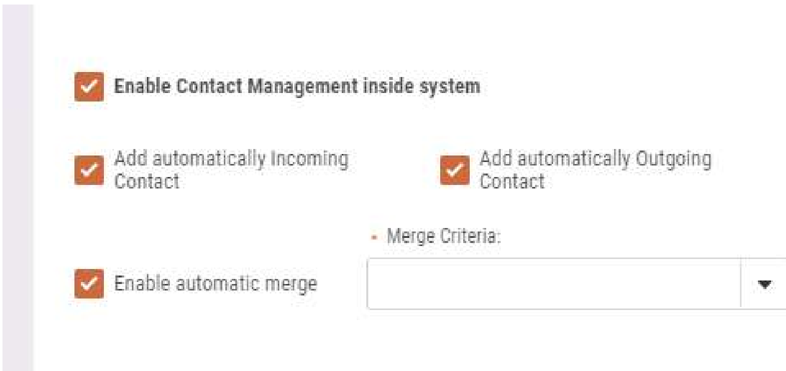

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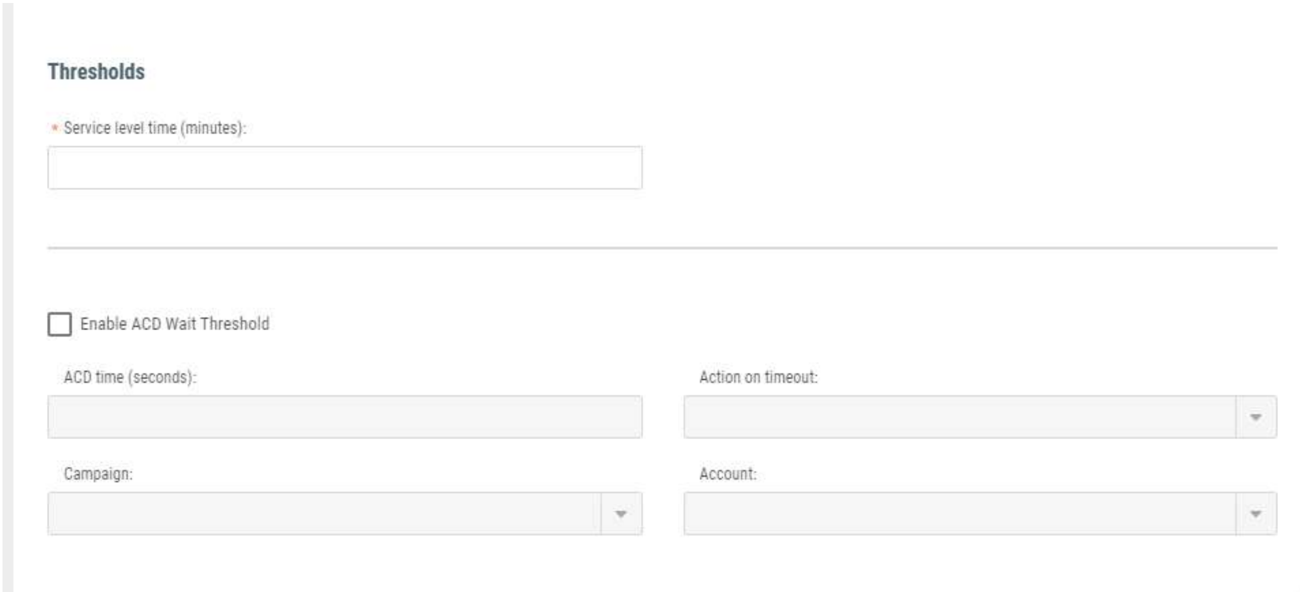
This information is not specific to the account but will be common to all accounts in the channel. Editing from here will only be possible if the account being defined is the first of its type, otherwise they will be read-only fields. To edit the channel thresholds, read: "How to edit a channel's general setup".



Thresholds: here you specify the time **thresholds** for different service and operational actions.

Service Level: maximum answer time for the communication to be considered to have been attended within the desired Service Level.

13. After completing all the required fields, click the "SAVE" button to continue.
14. To cancel the operation without saving the entered data, click the "CANCEL" button.

Related Articles

- User search
- How to set up Messenger messaging
- How to associate a YouTube account
- How to associate an application from Google Play Store
- How to associate an application from the App Store

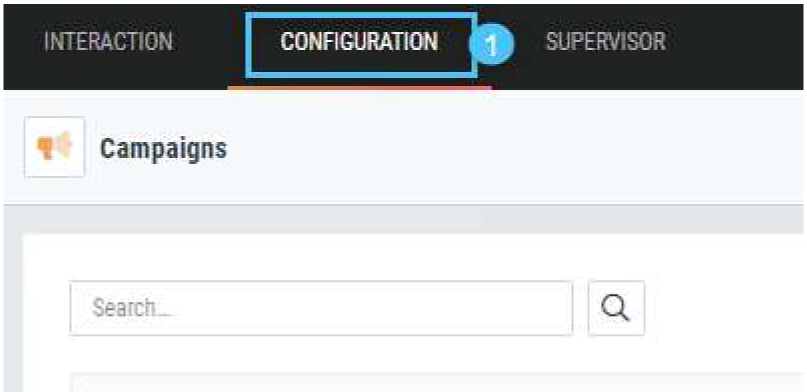
Manage accounts

How to edit a Channel's general setup

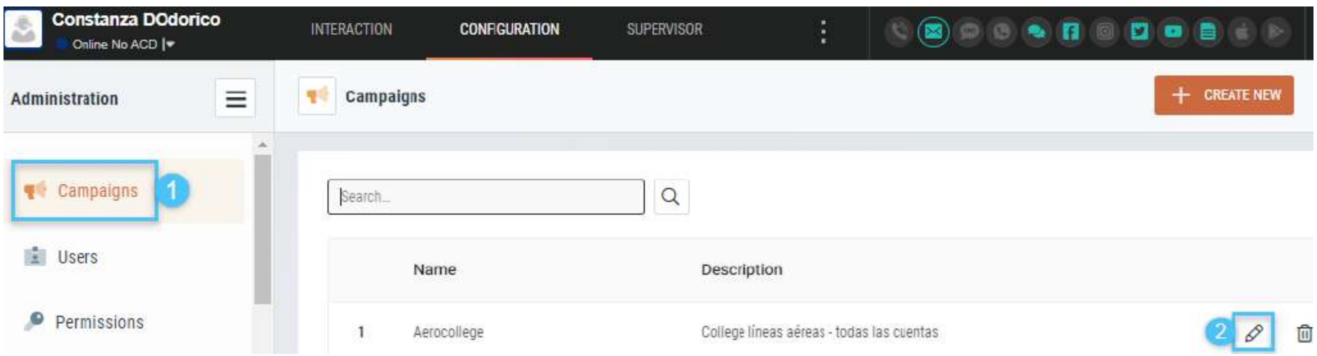
Once an account has been created/assigned, you can edit it whenever required to make adjustments and/or modifications. Yet, there are configurations which are general to the communication channels, reason why you will be able to edit such configurations over an associated channel of a specific campaign, without affecting the same channels that belong to another campaign.

To edit the channel's general configurations you have to:

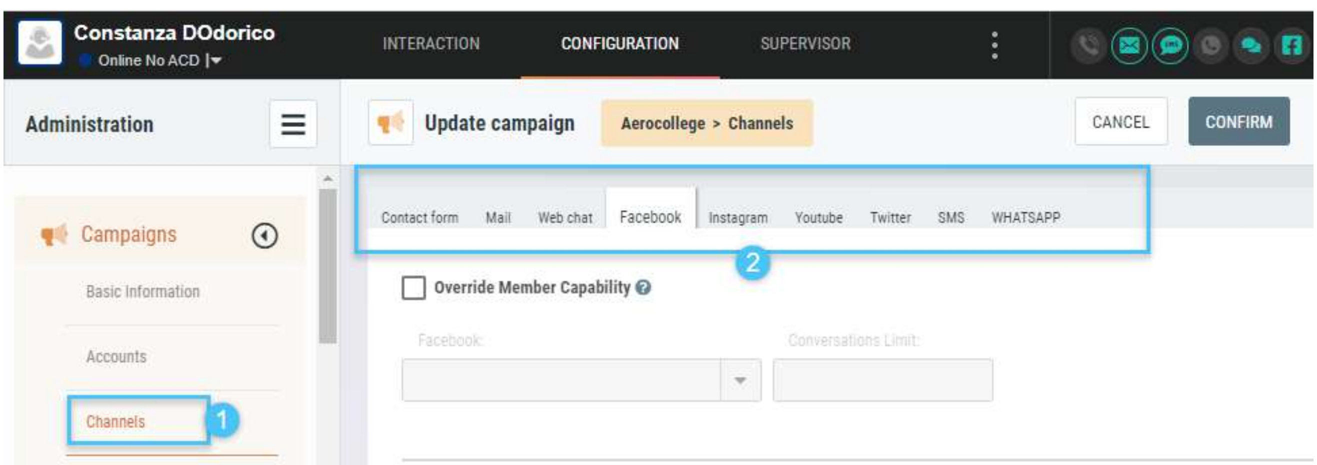
1. Go to the "Configuration" tab:



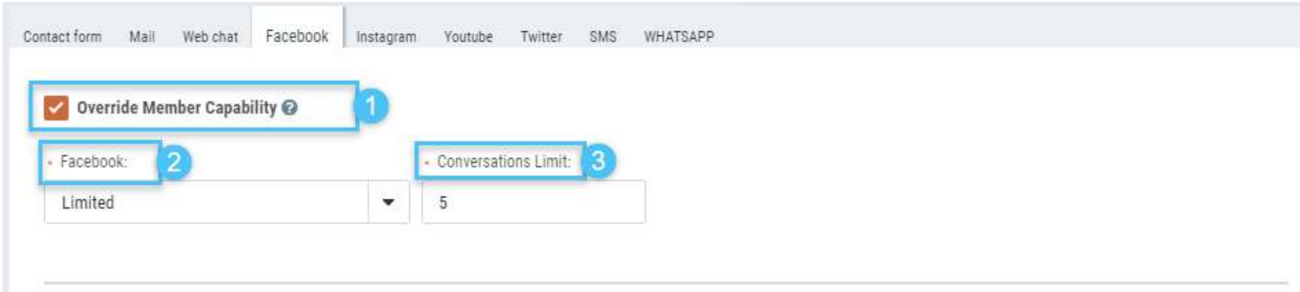
2. Click on the "Campaigns" section 1 and press the "Edit" button of the campaign where you wish to make the changes 2 :



3. Click the campaign's "Accounts" section 1 and go to the channel tab where you will make the modifications 2 :



4. Set up the Attention Capabilities:



1 : if checked, the existent "Attention capacity" setup will be overwritten. For more information, read: "How to edit the Attention Capabilities".

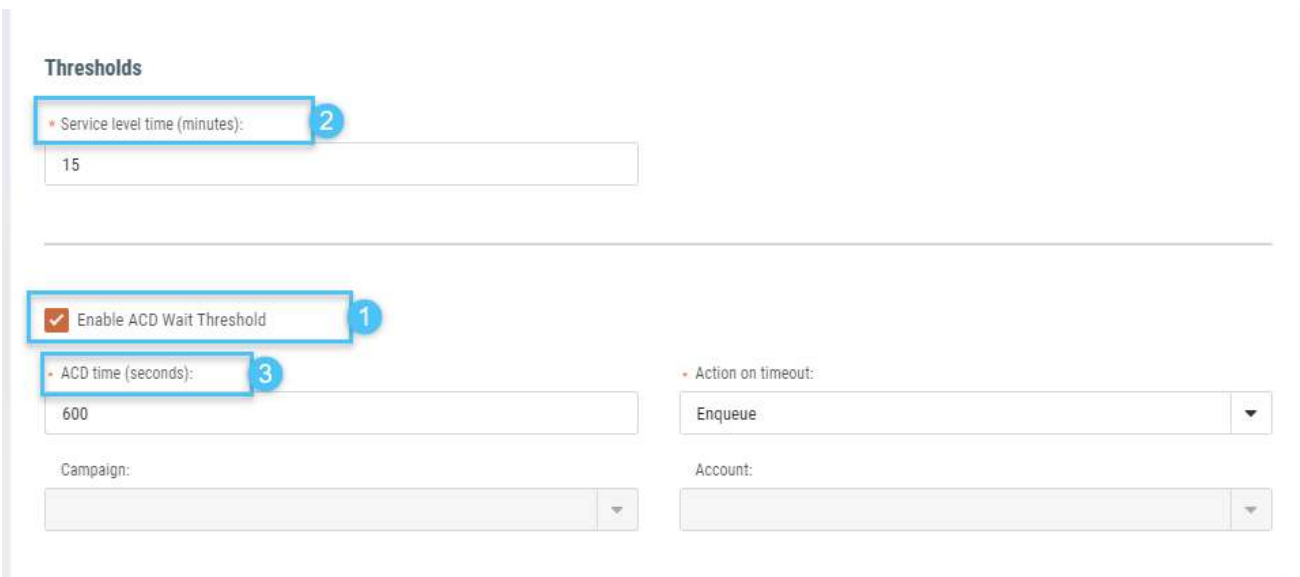
2 : choose if it will limit the interactions that the user will be able to take simultaneously for the communication channel or not.

3 : if limited, enter the limit.

For this case, it means that the user will be able to take 5 simultaneous Facebook interactions.

If the user is taking 5 interactions simultaneously, it must finish, transfer or requeue at least one to take a new one.

5. Threshold setup:



1 : if checked, you must specify the ACD time threshold.

2 : maximum amount of response time to consider the taken communication within the desired service level.

3 : ACD threshold time.

6. After making the changes, press the "SAVE" button to continue.
7. To cancel the operation without saving the changes, press the "CANCEL" button.

Related Articles

- User search
- How to set up Messenger messaging
- How to associate a YouTube account
- How to associate an application from Google Play Store
- How to associate an application from the App Store

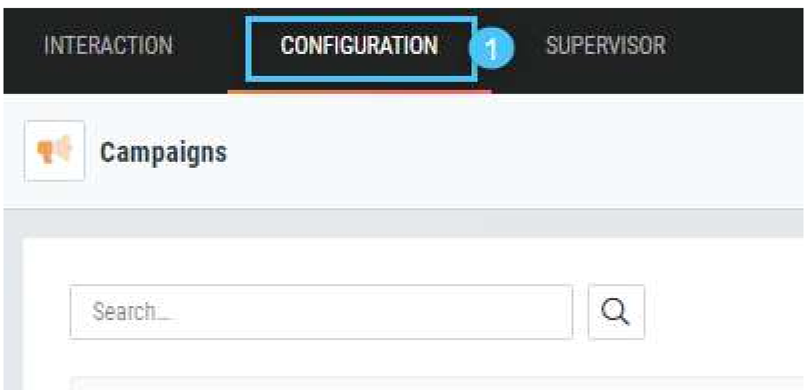
How to enable an account's Ticket Management feature

By enabling tickets management, you will be able to convert an interaction automatically of by demand into a ticket. To do so, you will have to first create a ticket emitter, thus being able to enable it for the account you need it for.

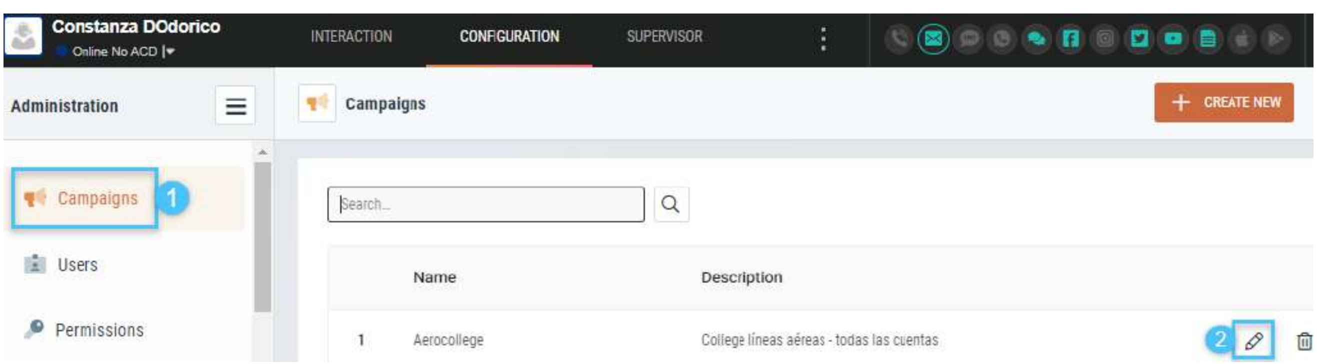
> To learn how to create a ticket emmiter, read: "How to create an emitter".

To enable Tickets Management for an account you have to:

1. Go to the "Configuration" tab:

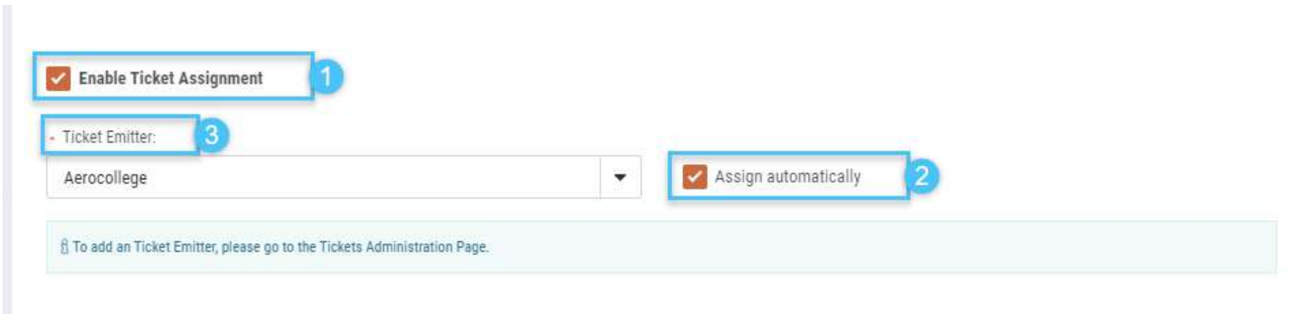


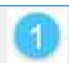
2. Click on the "Campaigns" section 1 and press the "Edit" button of the campaign where you wish to enable the Ticket Manager 2 :

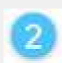


3. Click the campaign's "Accounts" section 1 and then press the "Edit" button of the account you want to modify 2 :

4. Enable Tickets Management:



: if checked, tickets will be assigned on demand for each interaction and Tickets Management will be enabled for the account.

: assign tickets automatically for each interaction. It's optional.

: select the preset tickets emitter. To learn how to set up a tickets emitter, read: "How to create an emitter".

5. After completing all the required fields, press the "SAVE" button to continue.
6. To cancel the process without saving the changes, press the "CANCEL" button.

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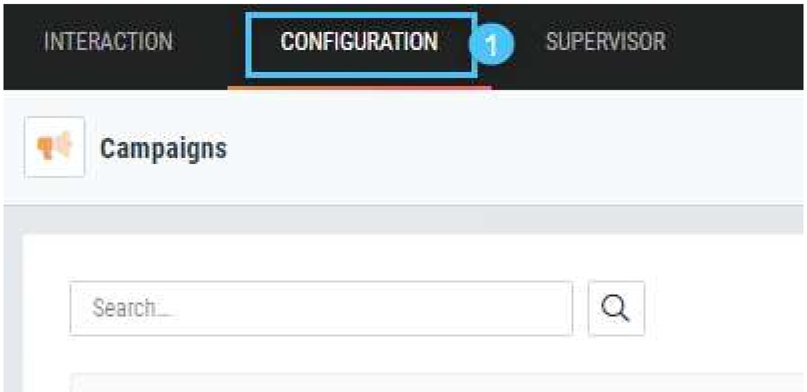
How to associate Attention Levels to an Account

The attention levels are groups of agents that manage an account's interactions, meaning, the new interactions that can be assigned according to the defined attention levels. Once the attention levels have been defined, you can associate them to the account you prefer.

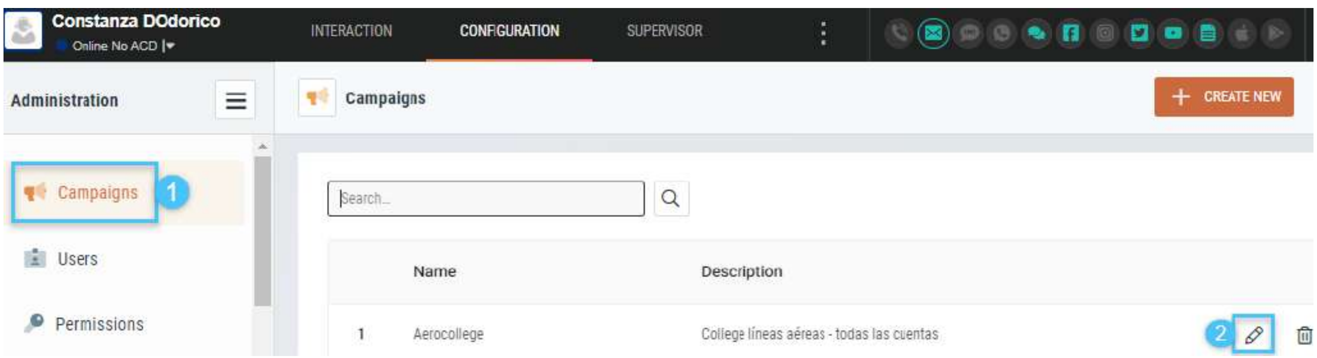
To learn how to define an attention level, read: "How to define an Attention Level".

To associate an Attention Level to an account you have to:

1. Go to the "Configuration" tab:

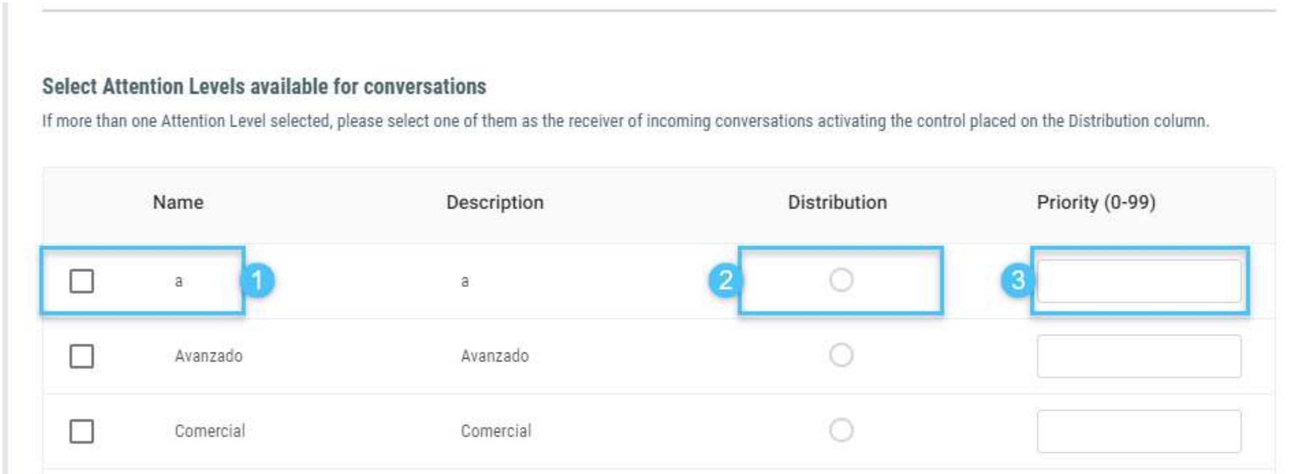


2. Click on the "Campaigns" section  and then press the "Edit" button of the campaign to which the account belongs and where the attention levels will be assigned  :



3. Click the campaign's "Accounts" section  and then press the account's "Edit" button  :

4. Check the checkboxes of the Attention Level(s) that you wish to associate:



 : check the Attention Level(s) to associate.

 : check this option to use the distribution algorithm set for the account for the Attention Level as well.

 : define the interaction priorities for this account in respect to the communications which arrive from other accounts; the higher the number, the higher the priority.

If more than one Attention Level is associated to the account, the new interactions will be assigned to the users which belong to the Attention Level where the "DISTRIBUTION" option has been checked, depending on the defined algorithm.

5. After completing all the required fields, press the "SAVE" button to continue.
6. To cancel the operation without saving the entered changes, press the "CANCEL" button.

Related Articles

- User search
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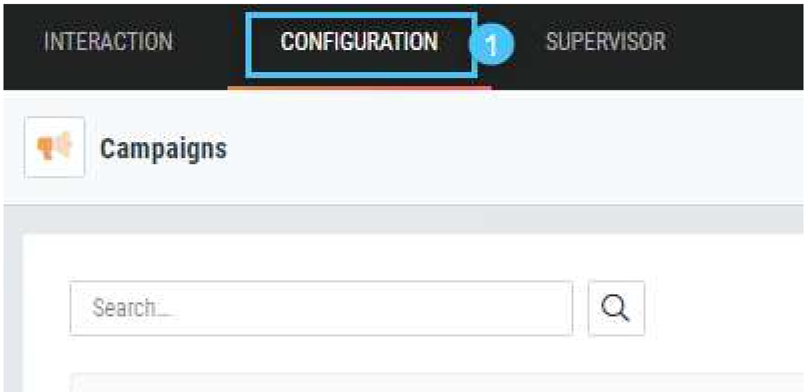
How to delete an Account

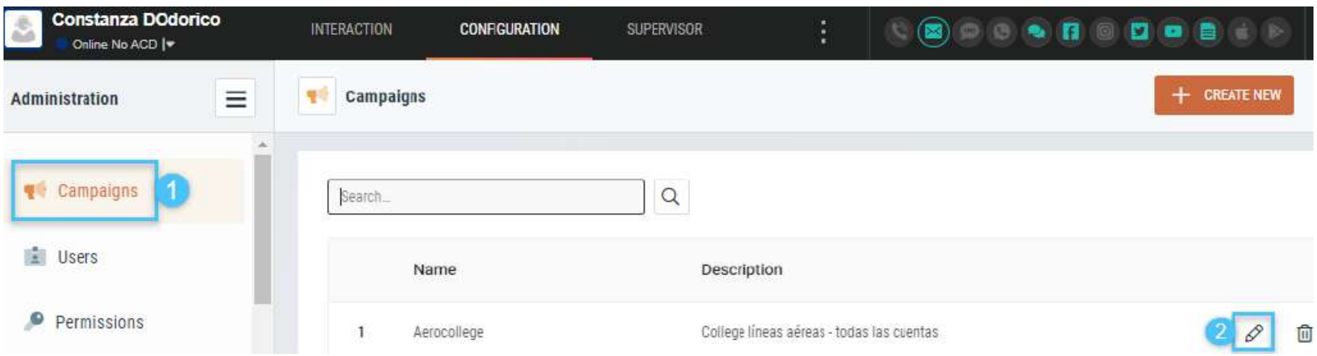
You can delete an account in a few easy steps. It is important to point out that by deleting the account of a specific communication channel, all the associated configurations will be lost, so you have be sure about the action's impact in your operative.

To delete an account you have to:

1. Go to the "Configuration" tab:

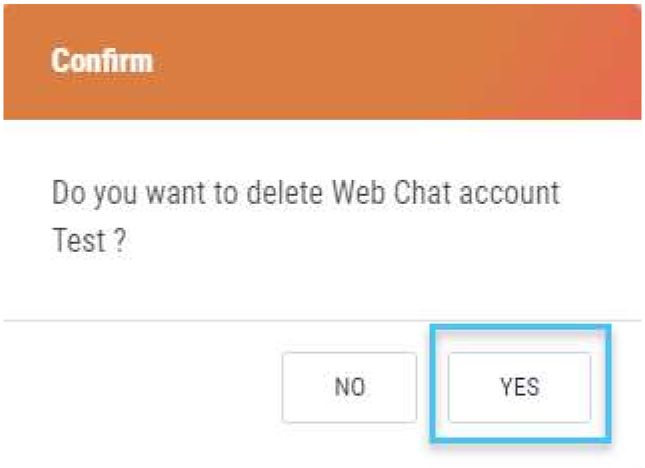


2. Click on the "Campaigns" section 1 and press the "Edit" button of the campaign where you wish to delete the account 2 :



3. Click the campaign's "Accounts" section 1 and then press the "Delete" button 2 :

4. Press the "Yes" button to confirm the account deletion:



5. The system will show the successful deletion message:

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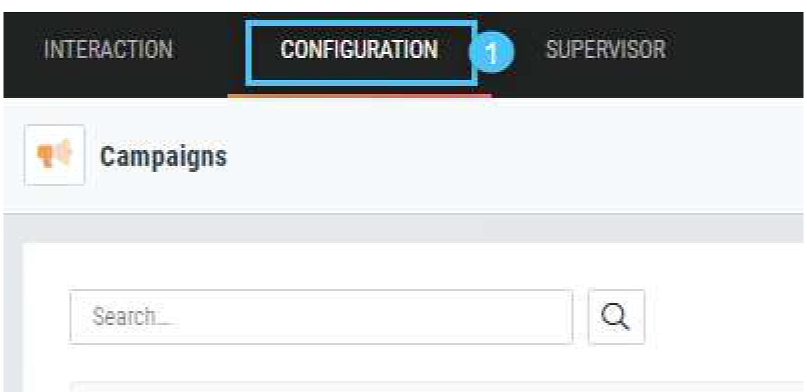
How to deactivate an account

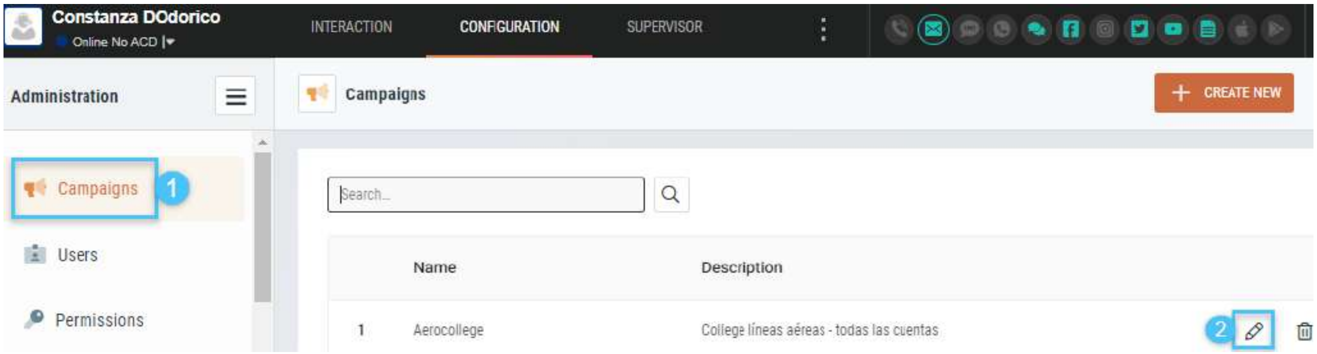
If you wish to remove the operative of an account of a specific communication channel, it is not necessary to delete it; you can deactivate it, thus being able to activate it back again if necessary, keeping all the configuration without the need of creating it again.

To deactivate an account you have to:

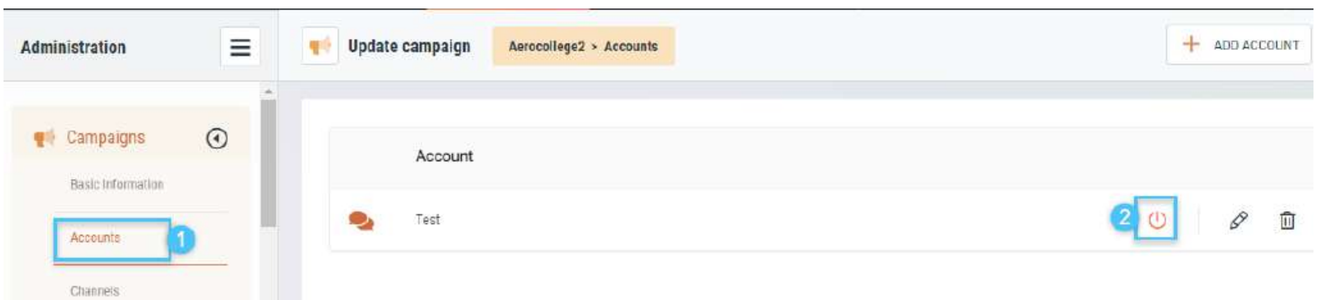
1. Go to the "Configuration" tab:



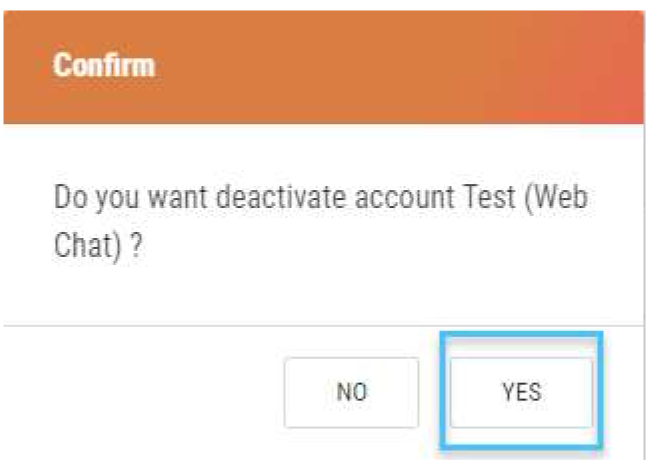
2. Click on the "Campaigns" section 1 and press the "Edit" button of the campaign where you wish to deactivate the account 2 :



3. Click the campaign's "Accounts" section 1 and then press the "Deactivate" button 2 :



4. Press the "Yes" button to confirm the account deactivation:



5. The system will show the successful deactivation message 1 :

To reactivate the account, press the account's "Activate" button  .

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- [Paso 2: Instalación de inConcert OCC]
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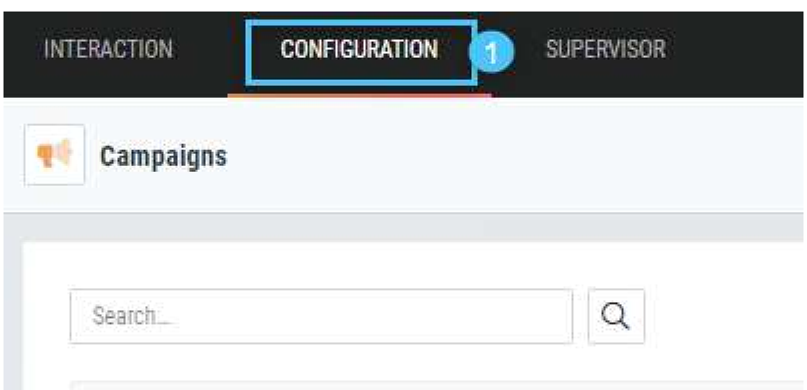
- [Cómo eliminar una Campaña]

How to edit an Account

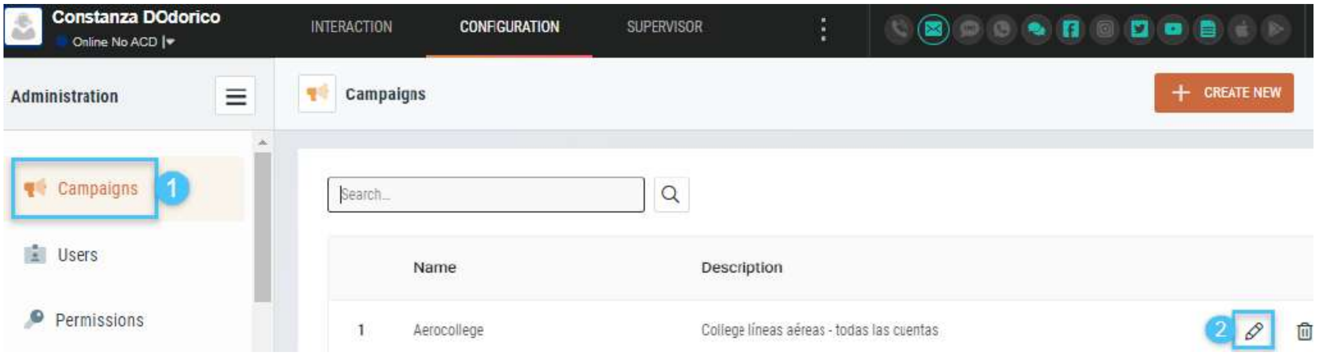
After creating/associating an account, it is possible to edit it to make modifications or adjustments. Such modifications will have immediate effect over the channel's account configuration according to the changes.

To edit an account you have to:

1. Go to the "Configuration" tab:



2. Click on the "Campaigns" section  and press the "Edit" button of the campaign where you wish to make the changes  :



3. Click the campaign's "Accounts" section and then press the "Edit" button of the account you want to modify :

The account identifier name is a unique value and cannot be edited.

Because of being general channel configurations, to edit the "Thresholds" information, read: "How to edit the Channels' general configurations".

4. After making the changes, press the "SAVE ACCOUNT" button to continue.
5. To cancel the operation without saving the changes, press the "CANCEL" button.

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How to create Call acounts

- How to create a Call account
- How to create a Call account (with Native Telephony)

How to create a Call account

Creating a call account in a campaign will allow you to manage interactions through phone calls, which can be inbound and/or outbound. Interactions can be handled depending on the Attention Levels that are set up. Each interaction can also be converted into a ticket. If the user involved in the interaction is not yet a contact, they can be added using Contact Management.

OCC will allow effective management of interactions, since inbound calls abandoned by clients may be scheduled at the discretion of the Contact Center operation, and thus these clients can be contacted to provide appropriate and efficient attention.

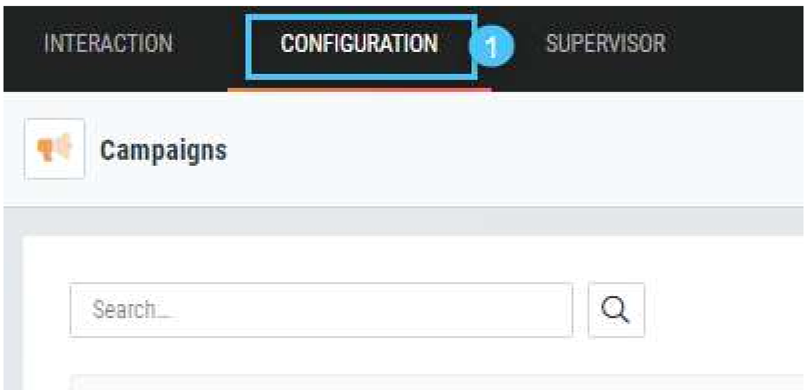
You will be able to configure inbound calls to be forwarded to an IVR during or outside the hours defined by the attention schedule, in addition to configuring Voicemail facilities, announcing position in the queue and announcing hold time.

In the same way, you can configure outbound calls to be derived from an IVR, during or outside the hours defined by the attention schedule, as well as have an Outbound Engine in its different modalities, such as: Automated, Predictive Dialer and Progressive Dialer.

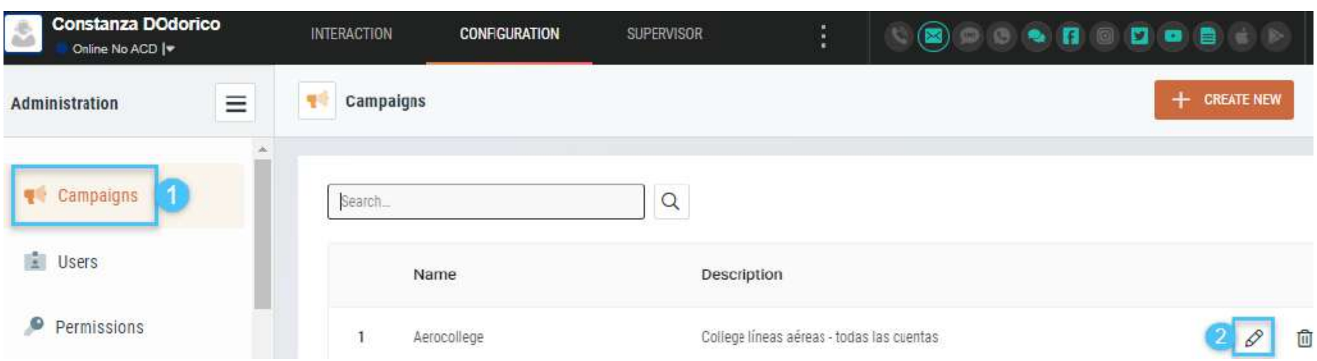
⚠ The call account must be the first and only one in the campaign, that is, once the call account is created, the creation of any other communication channel will not be permitted. Additionally, the creation of a call account will not be permitted in a campaign in which an account from another channel has already been created.

To create a call account in a campaign:

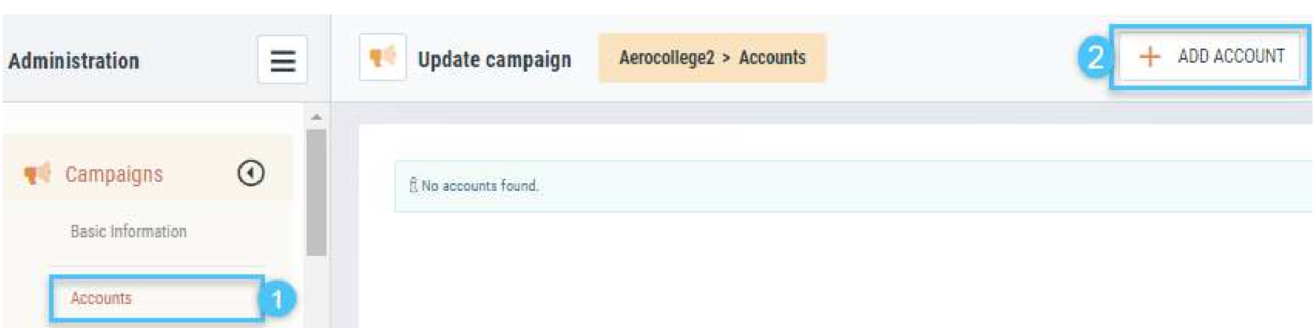
1. Go to the **"Configuration"** tab:



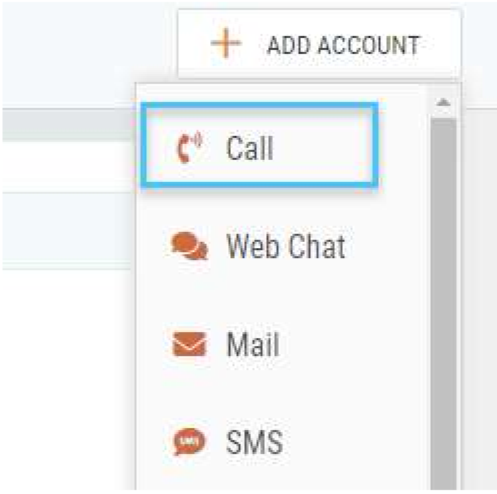
2. Click on the **"Campaigns"** section 1 and then click the ***"Edit"*** button of the campaign where the account will be created 2 :



3. Click on the ***"Accounts"*** section of the campaign 1 and then click the button **"ADD ACCOUNT"** 2 :

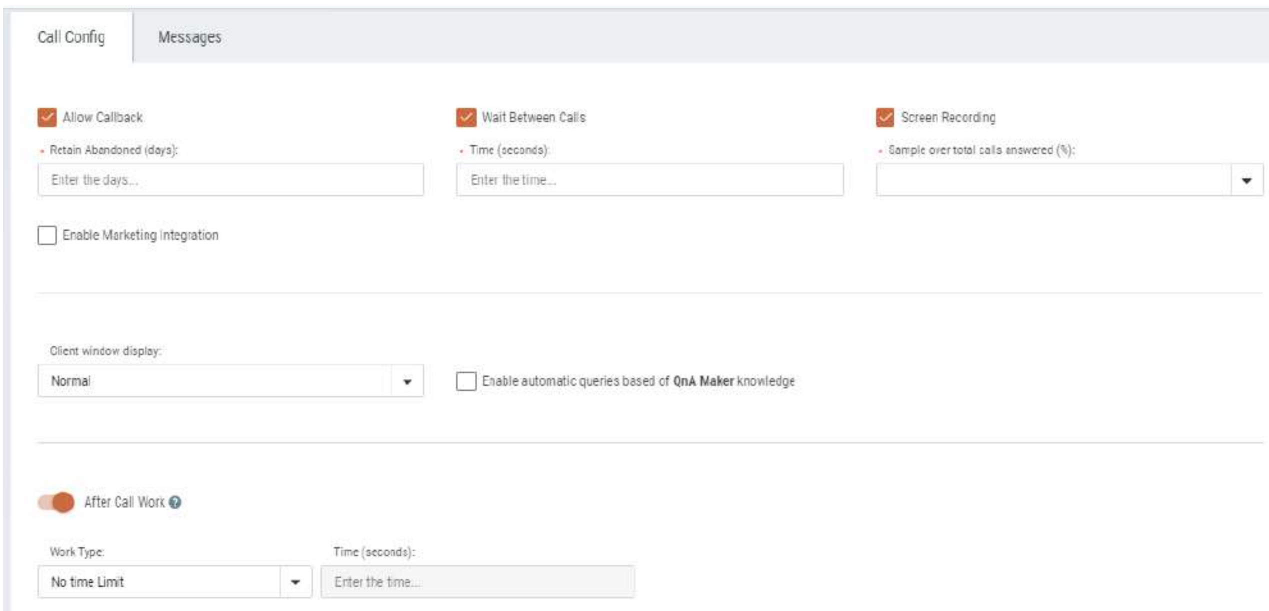


4. Select the account type "Call":



5. Enter the required data:

   a. **Account information:**



Allow callback: checking this box will enable the return of calls abandoned by clients.

Wait between calls: checking this box will allow a certain period of time between calls. Otherwise, the agent will receive the next call after the wrapup time. The wait time between calls must be defined.

Screen recording: checking this box will mean that when an agent takes a call, OCC will start recording their screen.

% Recording: The % is based on the number of calls, that is, if you configure 10%, it means that 10% of the calls that the agent answers will be recorded.

Integration with Marketing: checking this box will enable integration with the inConcert Marketing tool.

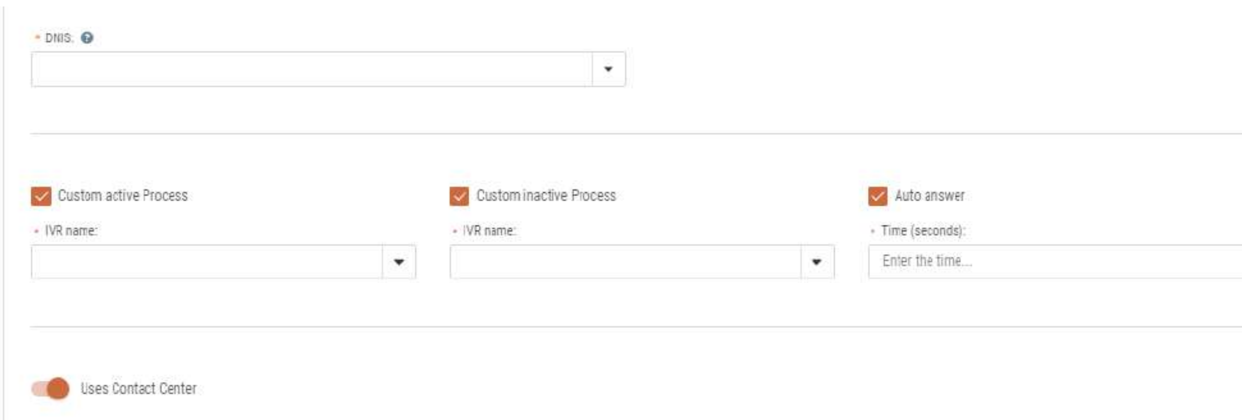
Time after call: if you check this box, the wrapup time will be enabled. During this time, the agent will be able to carry out tasks after finishing the call.

Type: select from the drop-down list whether the wrapup time will be limited or not. If you select "Time Limited", you must define the maximum number of seconds that the agent will have in the wrapup time.

b. **Configuration of inbound calls:**

To enable inbound calls, in the "INBOUND" tab check the "Inbound" box:

Then, configure the following:



DNIS: It is the phone number that clients must call. The numbers that appear in this list are defined by the CCV Infrastructure Administrator.

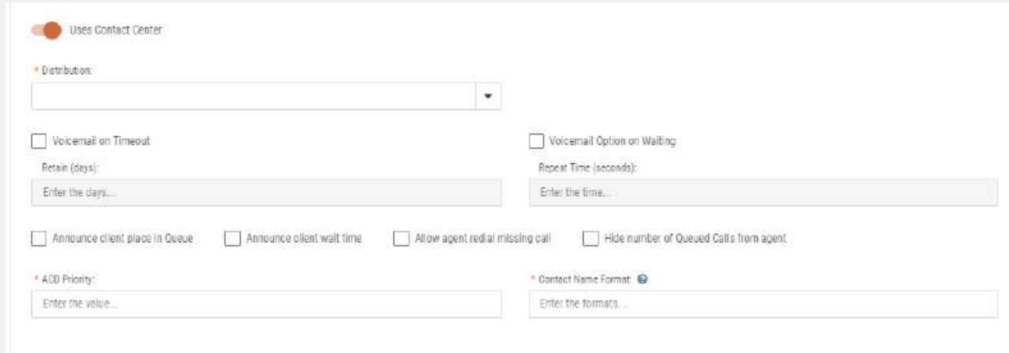
Custom active process: if you check this box, an automatic IVR must be indicated to reply to calls arriving within the attention schedule configured for the campaign.

Custom inactive process: if you check this box, an automatic IVR must be indicated to reply to calls arriving outside the attention schedule configured for the campaign.

Auto attend: if you check this box, the call will be taken automatically, without the need for the agent to click the corresponding button. The time for such an automatic reply must be defined.

Use contact center: if you check this box, you will need to configure the options of the agents who will receive the calls and work on the operation.

Uses Contact Center: options to configure



Distribution: it is the routing algorithm that will allow the calls to be correctly directed to the available agents. *The options are: Circular, Load Balancing, Greater Load and Skill.*

The **Circular algorithm** will draw a circle between the connected agents, the first point of this circle is the agent that has the longest time without speaking; then if that agent is busy it will try to find the next agent who has been without work for the longest time.

Load Balancing refers to the work time of each agent. If you select this algorithm, the platform will try to ensure that all agents have the same amount of time worked by the end of the day.

The **Greater Load** algorithm will more heavily load the agents who spend more time talking, more time worked. This algorithm can be used for example to increase productivity, if it is detected that the agents who speak the most are those who are more productive.

The **Skill** algorithm will work exclusively with the skills that have been defined previously. This depends on the skills that are defined for both the campaign and the agents who will work on it.

Voicemail on Waiting: if you check this box, it will permit a voicemail to be left while the user is in the queue to be attended to. You must specify how often this option will be repeated.

Announce position in queue: if you check this box, the user will be told their position in the queue.

Announce waiting time: if you check this box, the user will be told the approximate waiting time in the queue.

Allow re-dialing: if you check this box, the agent will be allowed to redial; that is, the agent will be able to dial the phone number associated with the user of the abandoned calls.

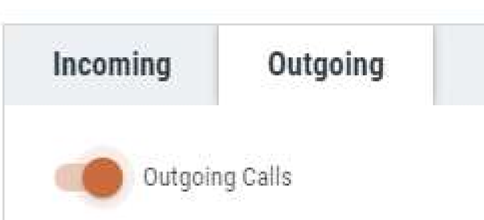
Hide ACD: if you check this box, the number of calls that are waiting to be answered will not be displayed on the agent’s frontend.

ACD Priority: determines the priority of the campaign calls that are waiting to be attended to.

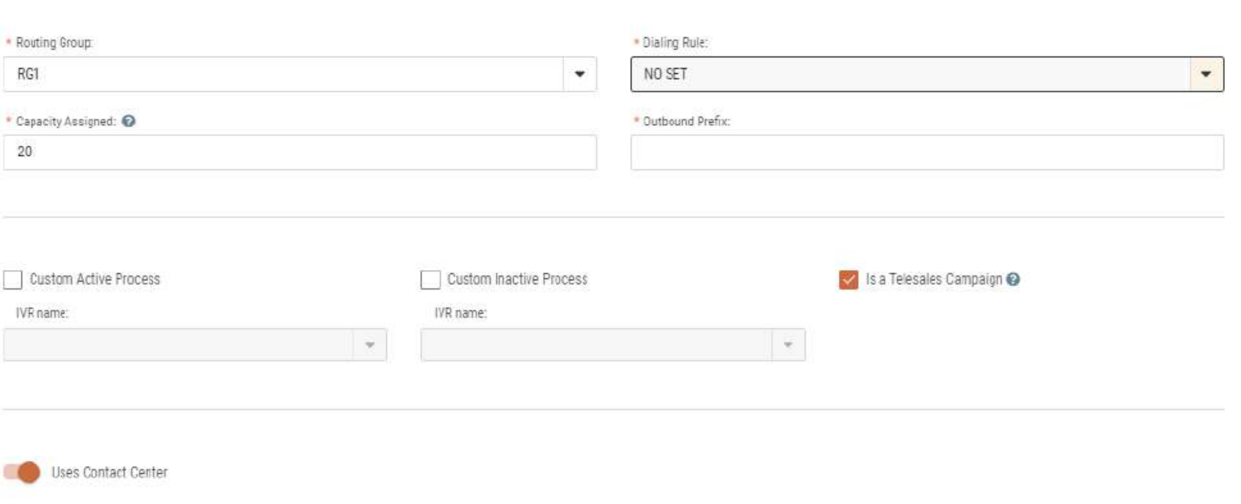
Contact name format: the contact name format will be reflected in the agent's interface and can show important data, this is very useful when you have an agent who works on more than one campaign, it can show in real time from which campaign and through which number they are receiving the call.

c. **Configuration of outbound calls:**

To enable outbound calls, in the "OUTBOUND" tab check the "Outbound" box:



Then, configure the following:



Routing group: the routing group will determine where outbound calls will be sent.

Capacity Assigned: number of channels assigned to the routing group; this number will indicate the number of simultaneous outbound calls allowed.

Dialing Rule: NOT SET must be selected.

Outbound prefix: call prefix for the campaign.

Custom active process: if you check this box, an automatic IVR must be indicated for calls during the attention schedule configured for the campaign.

Custom inactive process: if you check this box, an automatic IVR must be indicated for calls outside the attention schedule configured for the campaign.

Telesales campaign: if you check this box, you will be indicating that it is a sales campaign.

Use contact center: on checking this box, you must configure the options of the agents who will receive the calls and work on the operation.

Uses Contact Center: options to configure

Distribution: it is the routing algorithm that will allow the Outbound Engine to correctly direct calls to the available agents. *The options are: Circular, Load Balancing, Greater Load and Skill.*

The **Circular algorithm** will draw a circle between the connected agents, the first point of this circle is the agent that has the longest time without speaking; then if that agent is busy it will try to find the next agent who has been without work for the longest time.

Load Balancing refers to the work time of each agent. If you select this algorithm, the platform will try to ensure that all agents have the same amount of time worked by the end of the day.

The **Greater Load** algorithm will more heavily load the agents who spend more time talking, more time worked. This algorithm can be used for example to increase productivity, if it is detected that the agents who speak the most are those who are more productive.

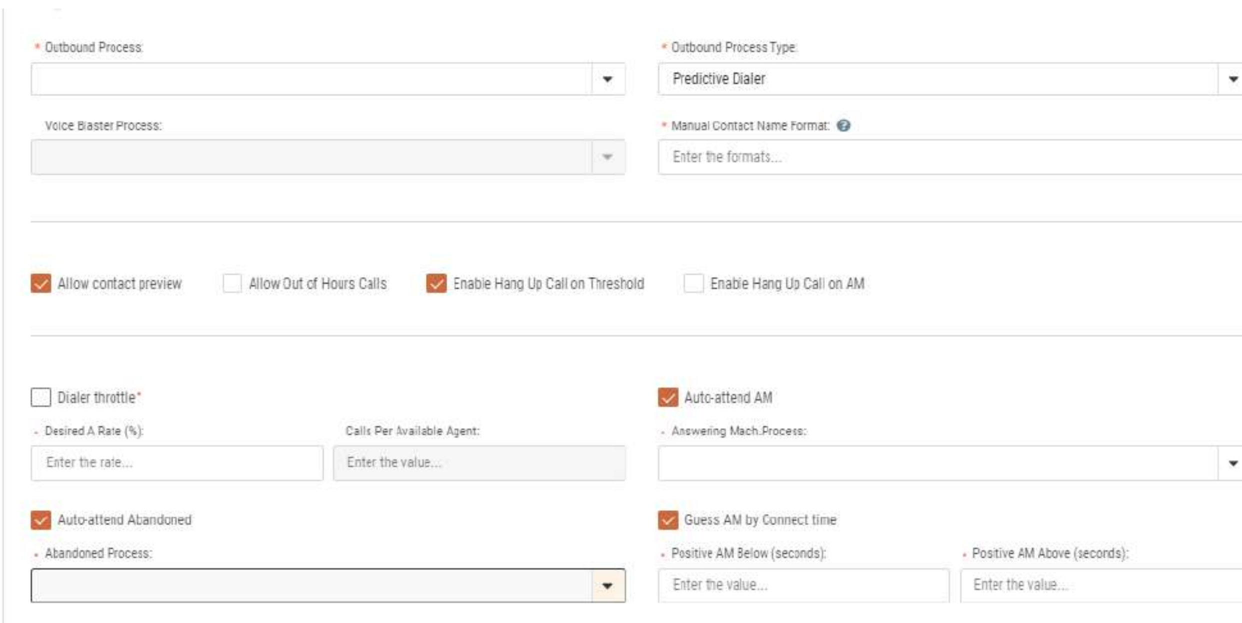
The **Skill** algorithm will work exclusively with the skills that have been defined previously. This depends on the skills that are defined for both the campaign and the agents who will work on it.

Manual Calls: checking this box will allow manual outbound calls.

Contact Name format (manuals): the contact name format will be reflected in the agent's interface and can show important data, this is very useful when you have an agent who works on more than one campaign, it can show in real time from which campaign and through which number they are receiving the call.

d. **Outbound Engine configuration:**

If you check the "Uses Outbound Engine" box, you then need to configure the Dialing Engine options:



Select the "Outbound Process" to use and depending on the "Outbound Process Type", you will need to configure the following:

If "Automated" is selected

Automated Process: automated process to be used.

Call Out of Hours: if you check this box, calls will be enabled outside the scheduled hours configured for the campaign.

Dialer Throttle: if you check this box, you must indicate the number of calls that will be allowed per available agent.

Desired Rate: expressed as a percentage, it will indicate the value that is taken as acceptable to be lost during the contact process.

Hang Up Call on Threshold: checking this box will finish the call when the configured threshold is met.

Auto-Attend AM: if you check this box, you will enable auto-attend answering machines. The process should be indicated.

Guess AM by Connect Time: if you check this box, you will be enabling auto-attend answering machines based on the connection time of the call. The time that will be taken as a reference to carry out this action must be indicated.

Contact Name Format: the contact name format will be reflected in the agent's interface and can show important data, this is very useful when you have an agent who works on more than one campaign, it can show in real time from which campaign and through which number they are receiving the call.

If "Predictive Dialer" is selected

Has preview: if you check this box, the preview of the contact will be enabled.

Dialer throttle: if you check this box, you must indicate the number of calls that will be allowed per available agent.

Desired Rate: expressed as a percentage, it will indicate the value that is taken as acceptable to be lost during the contact process.

Hang Up Call on Threshold: checking this box will finish the call when the configured threshold is met.

Auto-Attend AM: if you check this box, you will enable auto-attend answering machines. The process should be indicated.

Auto-Attend Abandoned: if you check this box, you will enable auto-attend to abandoned interactions. The process should be indicated.

Guess AM by Connect Time: if you check this box, you will be enabling auto-attend answering machines based on the connection time of the call. The time that will be taken as a reference to carry out this action must be indicated.

Contact Name Format: the contact name format will be reflected in the agent's interface and can show important data, this is very useful when you have an agent who works on more than one campaign, it can show in real time from which campaign and through which number they are receiving the call.

If "Progressive Dialer" is selected

Has preview: if you check this box, the preview of the contact will be enabled.

Hang Up Call on Threshold: checking this box will finish the call when the configured threshold is met.

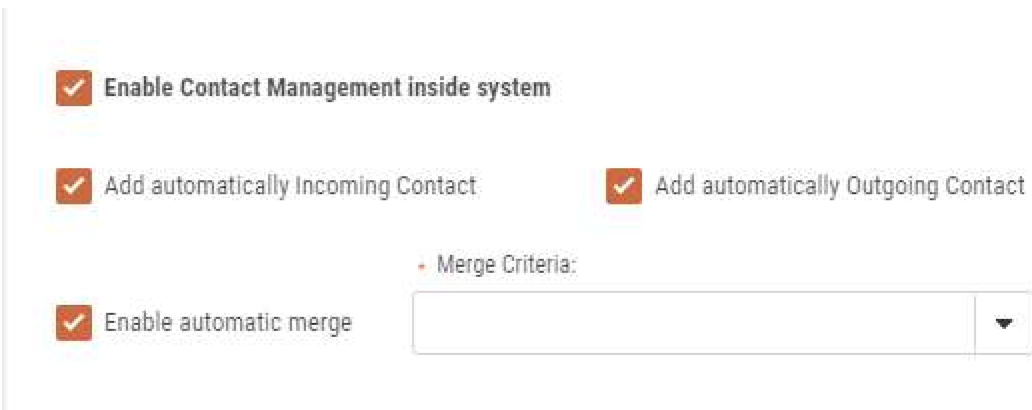
Auto-Attend AM: if you check this box, you will enable auto-attend answering machines. The process should be indicated.

Hang Up Call On AM: checking this box will finish the call when an answering machine is detected.

Guess AM by Connect Time: if you check this box, you will be enabling auto-attend answering machines based on the connection time of the call. The time that will be taken as a reference to carry out this action must be indicated.

Contact Name Format: the contact name format will be reflected in the agent's interface and can show important data, this is very useful when you have an agent who works on more than one campaign, it can show in real time from which campaign and through which number they are receiving the call.

e. **Contact management:** by enabling "Contact management" you will be able to create a new contact with each interaction, and if you wish, the system will do so automatically, both for inbound and outbound interactions. You can also define a criterion for saving the contact data.



Contact management: if you check this box, you will be enabling the option to create a new contact with each interaction.

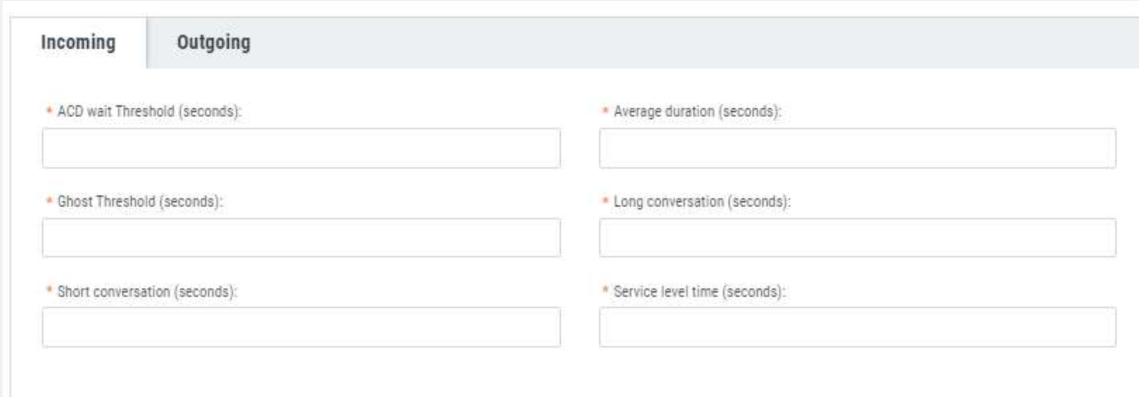
Auto Add Contact: if you check these boxes, the system will automatically create a new contact for each inbound and/or outbound interaction. *If it is not checked, contacts will be created manually.*

Automatic unification: after checking this box, you must define the criteria for saving the contact data. You can either keep the contact data already stored, or update the data in each new interaction.

f. **Thresholds:**

Editing from here will only be possible at the time of defining the account, otherwise they will be read-only fields. To edit the channel thresholds, read on: How to edit a Channel's general setup.

Inbound call thresholds



ACD Wait Threshold: Queue wait time threshold.

Average Duration: average call time threshold.

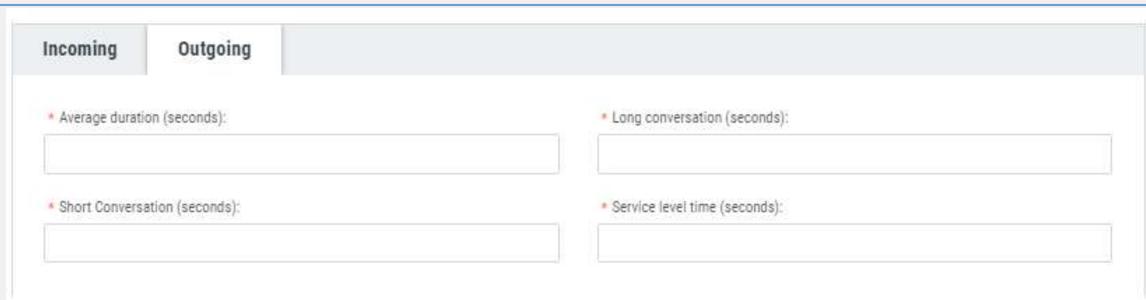
Ghost Threshold: ghost call threshold.

Long Conversation: long call threshold.

Short Conversation: short call threshold.

Service Level: maximum answer time for the call to be considered to have been attended within the desired service level.

Outbound call thresholds



Average Duration: average call time threshold.

Long Conversation: long call threshold.

Short Conversation: short call threshold.

Service Level: maximum answer time for the call to be considered to have been attended within the desired service level.

In the "MESSAGES" tab, the corresponding file(s) of the Multimedia Resources to be used in the campaign must be selected and uploaded.

6. After completing all the required fields, ***click the "SAVE ACCOUNT" button*** to continue.
7. To cancel the operation without saving the entered data, ***click the "CANCEL ACCOUNT" button***.

Related Articles

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- How to associate a YouTube account

How to associate an application from Google Play Store

How to associate an application from the App Store

How to create a Call account (with Native Telephony)

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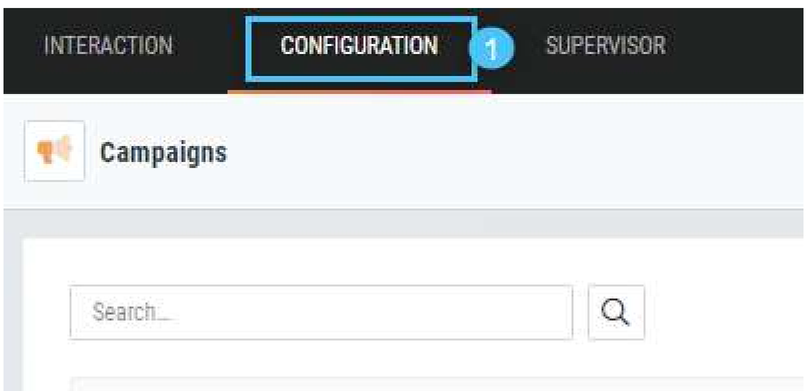
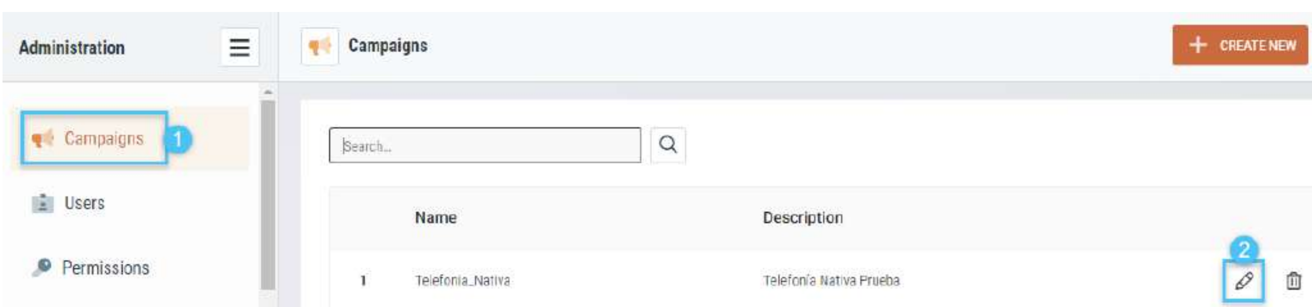
> ⚠ The call account must be the first and only one in the campaign, that is, once the call account is created, the creation of any other communication channel will not be permitted. Additionally, the creation of a call account will not be permitted in a campaign in which an account from another channel has already been created.

To create a call account in a campaign:

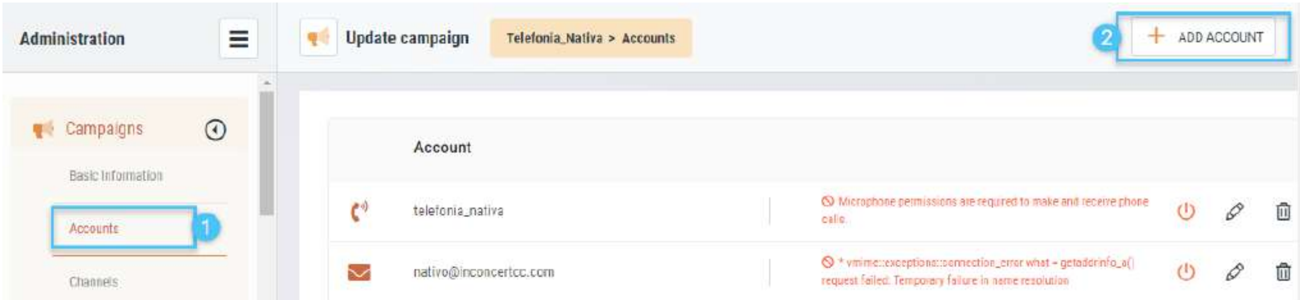
1. ***Go to the "Configuration" tab:***



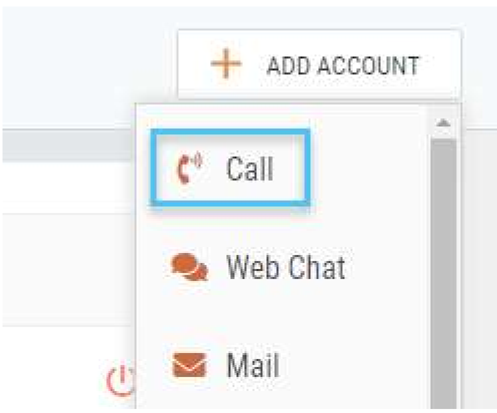
2. *Click on the "Campaigns" section* (1) and then *click the "Edit" button* of the campaign where the account will be created (2) :



1. *Click on the **"Accounts"*** section of the campaign (1) and then click the button ***"NEW ACCOUNT"*** (2) :

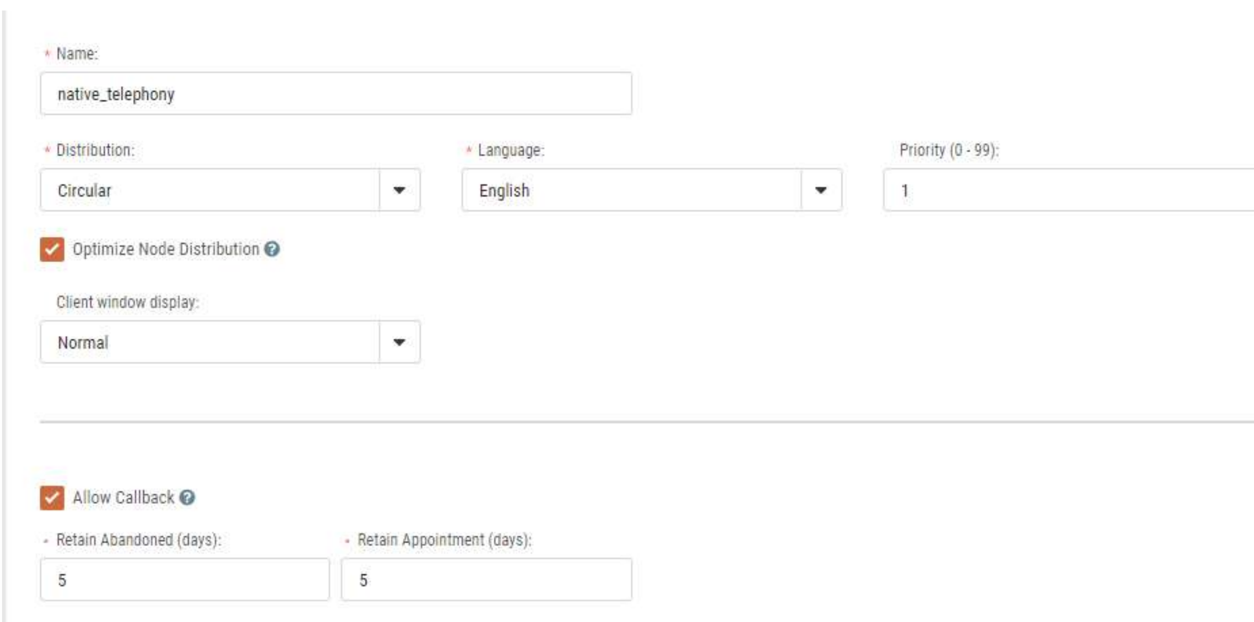


2. Select the ***account type "Call":***



3. Enter the required data:

   a. **Account information:**



See more...

Name: determines the name that will identify the account.

Distribution: is the routing algorithm that will allow the calls to be correctly directed to the available agents.

The options are: Circular, Queued, Skill.

> The **Circular algorithm** will draw a circle between the connected agents, the first point of this circle is the agent that has the longest time without speaking; then if that agent is busy it will try to find the next agent who has been without work for the longest time.
>
> **Queued** will allow interactions to be queued so that they can be taken manually by an agent.
>
> The **Skill** algorithm will work exclusively with the skills that have been defined previously. This depends on the skills that are defined for both the campaign and the agents who will work on it.

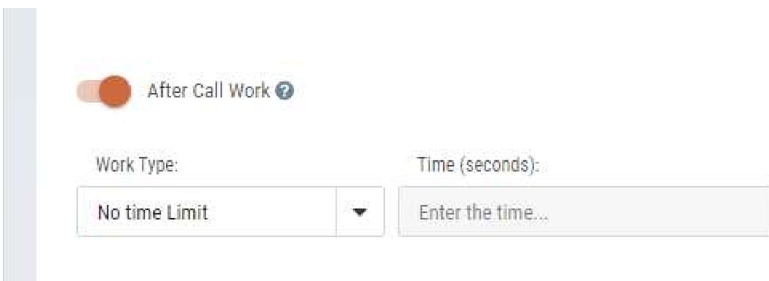
Priority: determines the priority of the campaign calls that are waiting to be answered.

Language: Determines the language used by the account.

Allow callback: checking this box will enable the return of calls abandoned by clients.

Retain Abandoned (days): if you check the "Allow callback" box, you must define the maximum number of days that abandoned calls will remain in the inbox to be able to return them.

Retain Appointment (days): if you check the "Allow callback" box, you must define the maximum number of days that scheduled appointments will remain.



See more...

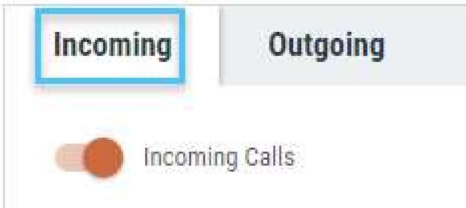
Work time: if you check this box, the wrapup time will be enabled; During this time, the agent will be able to carry out tasks after finishing the call.

b. **Packages:**

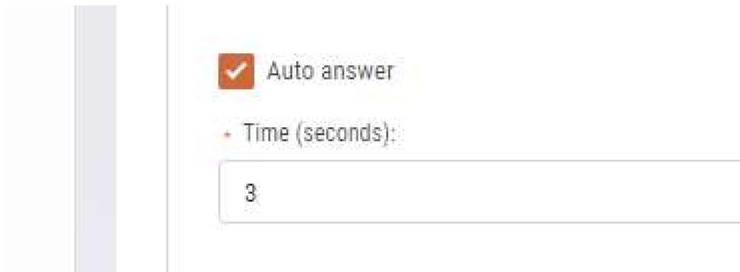
See more...

Select the packages associated with the account. You must select at least one

4. Configure the inbound calls section:

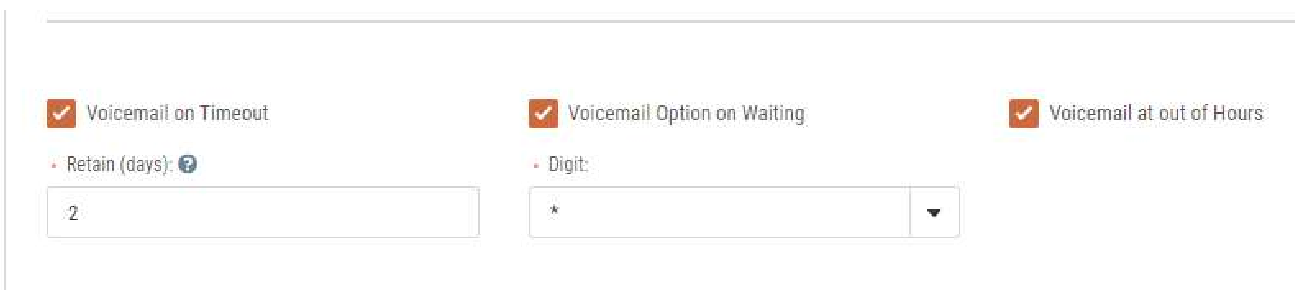


a. **Auto attend:** if you check this box, the call will be taken automatically, without the need for the agent to click the corresponding button. The time for such an automatic reply must be defined



b. **Allow re-dialing:** if you check this box, the agent will be allowed to redial; that is, the agent will be able to dial the phone number associated with the user of the abandoned calls

c. **Voicemail Configurations:** allows you to configure different voicemail options



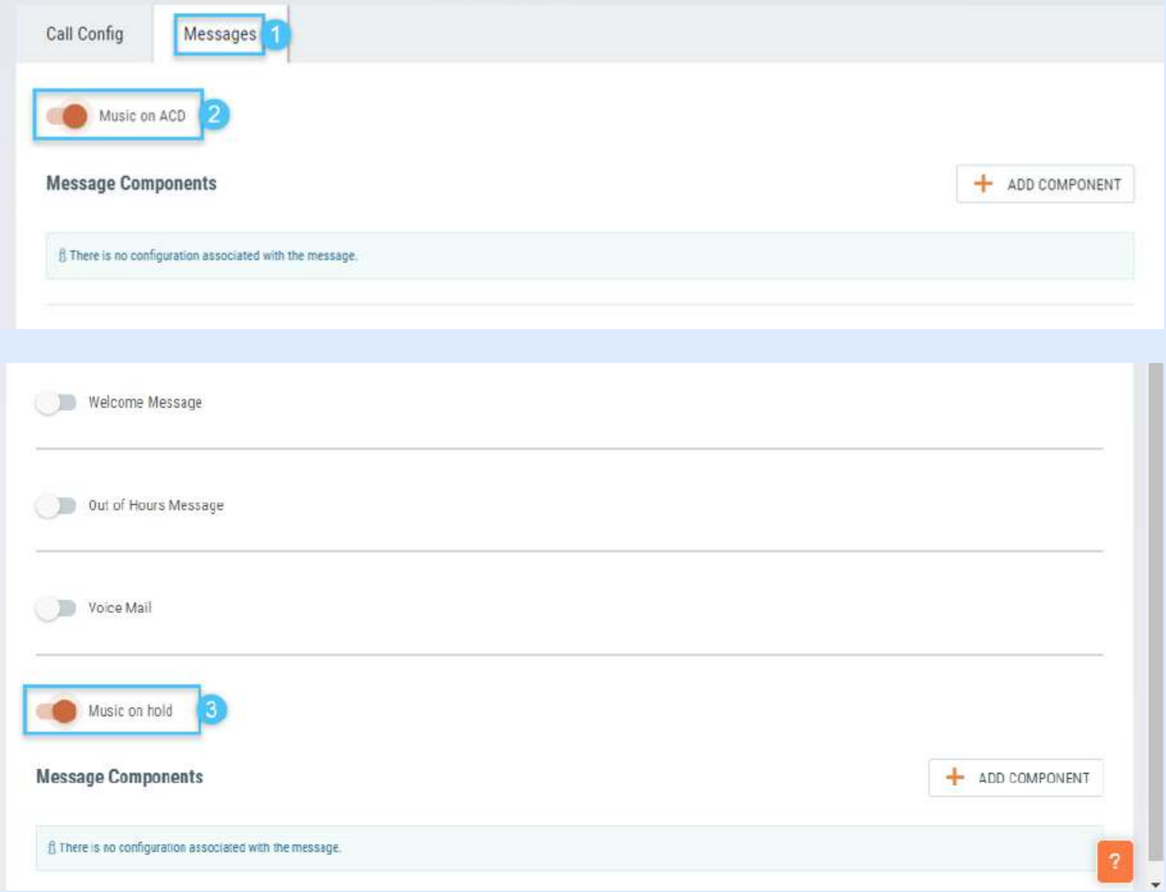
See more...

Keep for (days): allows you to define how many days the voicemails will remain in the inbox.

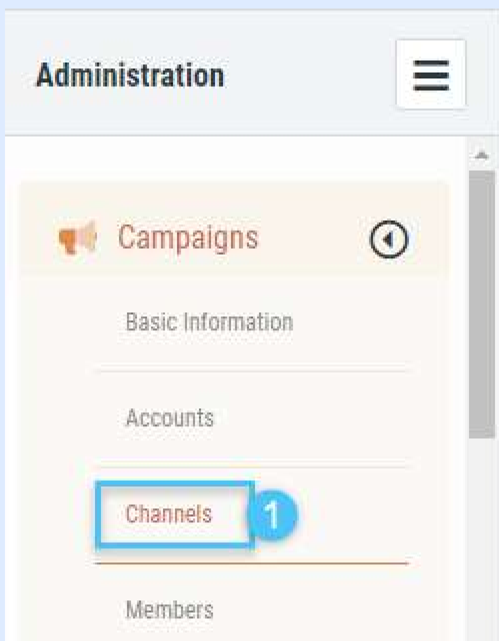
Voicemail at end of wait: if this option is enabled, the user will listen to the voicemail at the end of the wait.

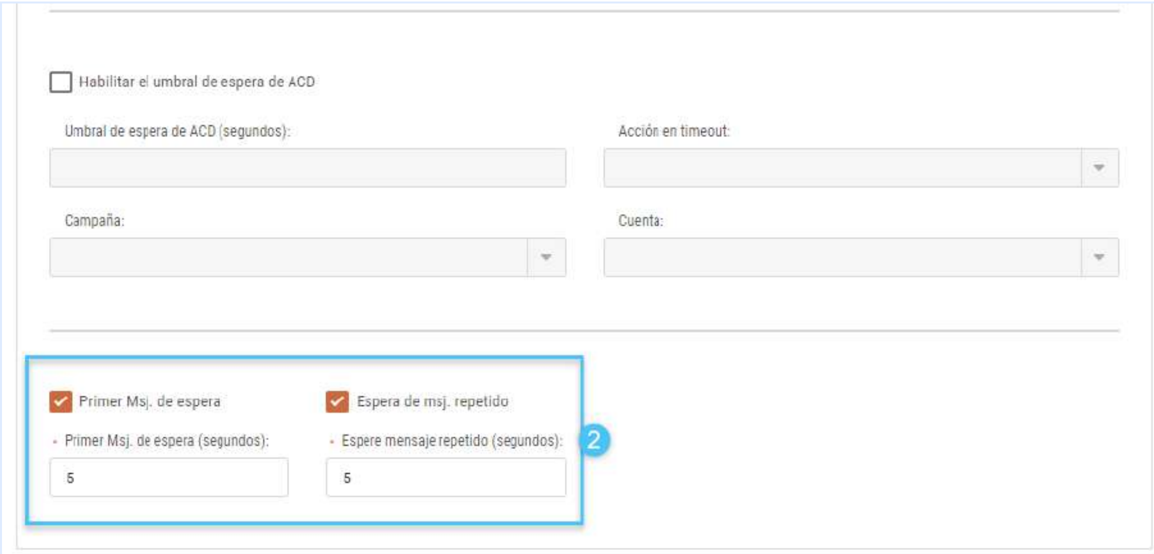
Voicemail while waiting: if this option is enabled, the user will be able to listen to the voicemail while waiting to be attended by clicking the indicated digit.

> **Important**
> For the correct operation of Voicemail while waiting, the following must be configured:
>
> a. Within the "Messages" section of the account (1), configure the Music in ACD (2) and the Music while waiting (3).



b. Additionally, in the Channels of the Campaign section (1), a Wait First Message must be set up and a Wait Repeated Msg (2).





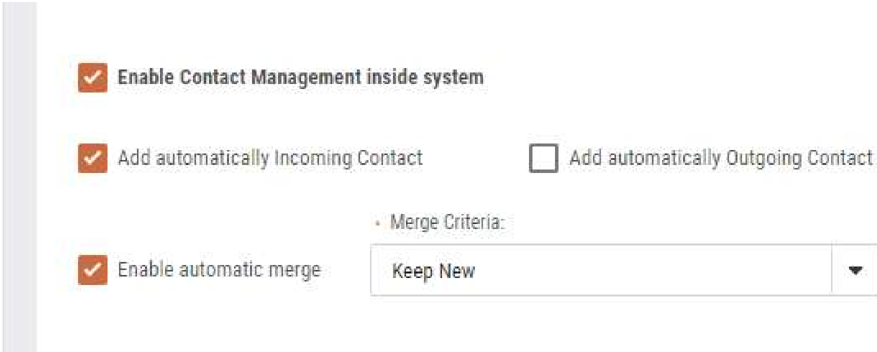
Its operation is as follows:

(1) when the call enters, it is put on hold and the audio "Music in ACD" is played.
(2) Then, after the seconds of "Wait First Message", the audio of "voicemail while waiting" is played and the system waits to see if the client enters the number to go to voicemail.
(3) Meanwhile, the "Music in ACD" audio continues to play.
(4) After the seconds of "Wait Repeated Msg" the audio "voicemail while waiting" is played again
(5) Point 4 is repeated until one of the following situations occurs: the call is cut/an available agent is obtained/the wait time is over/or the client enters the voicemail option.

Voicemail out of hours: if this option is enabled, it allows the operation of voicemail outside the established operating schedule of the campaign

d. **Attention Levels:** it is possible to select an attention level if there is one configured

e. **Contact management**: if you check this box, you will be enabling the option to create a new contact with each interaction

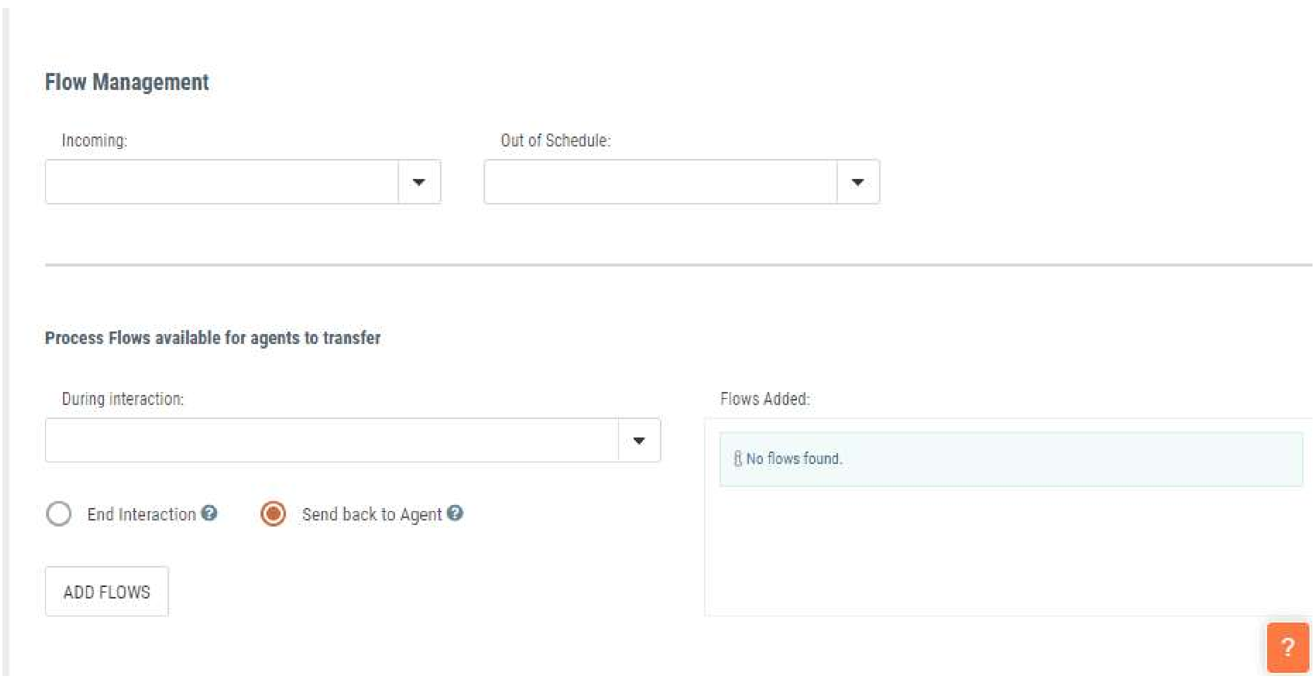


See more...

Auto Add Contact: if you check these boxes, the system will automatically create a new contact for each inbound and/or outbound interaction. *If it is not checked, contacts will be created manually.*

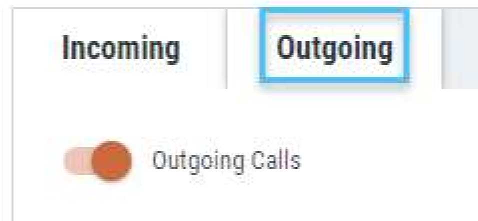
Automatic unification: after checking this box, you must define the criteria for saving the contact data. You can either keep the contact data already stored, or update the data in each new interaction.

f. **Flow management:** a previously configured IVR flow can be associated with the account.



h. **Client window:**you can select how you want the client window to be shown to the agent.

5. Then configure the outbound calls section:



a. **Outbound call configuration:** indicate if you want to be able to make manual outbound calls.

Info
At the moment, only manual outbound calls can be made, the option to use the Dialer is not available

6. **Thresholds**

Inbound call thresholds

ACD Wait Threshold: Queue wait time threshold. **Average Duration:** average call time threshold. **Ghost Threshold:** ghost call threshold.

Long Conversation: long call threshold.

Short Conversation: short call threshold.

Service Level: maximum answer time for the call to be considered to have been attended within the desired service level.

Outbound call thresholds

Average Duration: average call time threshold.

Long Conversation: long call threshold.

Short Conversation: short call threshold.

Service Level: maximum answer time for the call to be considered to have been attended within the desired service level.

7. Finally **click the "Save" button** to finish.

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