SmartAgent User Guide

Maintaining & Configuring SmartAgent Guide

Starting your **Smart**Agent Journey

Version	Date	Author	Changes
2.85	14/05/24	Paul Egan	MPC timings

Introduction

The purpose of this guide is to provide you with an introduction to some of the maintenance, configuration and build options for SmartAgent as a system admin.

We recommend attending an Agent and Supervisor session so you can be clear on logging in and normal expected behaviour to support your team.

There are a number of different setup options and modular additions for SmartAgent and the settings on display in this guide may not have been enabled for your system. We would also recommend using Amazon connect learning resources so you are aware of any changes / new functionality in Amazon Connect.

Your Project leaders will provide guidance on which features have been enabled for your organisation.

Pre-requisites for this training

To successfully complete this **SmartAgent – Admin User guide** you will require the following:

1. Access to a workstation
2. Access to the internet
3. **Google Chrome or Microsoft Edge browser**
4. A suitable headset, preferably a USB one
5. Your SmartAgent username and Password or sign-in credentials
6. A mobile phone / external phone to use in simulating a call

Duration of this training

Whilst the first time we run through this training we would anticipate their being some additional questions around rollout and procedural changes, under normal conditions we would expect that this session would typically be run within **60 Minutes**.

Who Should attend this training?

This training is aimed at supporting those who would have authority and responsibility for making amendments to the system to reflect changing demands, such as amending hours of operation for Public Holidays, amending key messages to customers etc. The system can easily and quickly be reconfigured to meet changing demands and this session will guide you through the steps needed to make simple and more complex changes if needed.

Agenda

Module 1: Getting Started

- Logging in to SmartAgent using a Password
- Logging in to SmartAgent using Single sign-on
- Notifications & cookies
- Accessing Connect from SmartAgent

Module 2 Maintenance Tasks for admins

- Create, Amend and Suspend Users
- Public Holidays / Changing Hours of Operation
- Business Continuity Messaging
- Amending Hold music or other recorded messages
- Amending Text to Speech messages
- Adding or Amending Agent Status Codes
- Adding or Amending “Quick connects”
- Managing Chat “Quick Replies”
- App Configuration screen
- Editing / Changing Contact Log settings
- Contact Log examples
- Channel Settings Configuration

Module 3: Making Structural Changes

- Phone Numbers
- Adding / Amending Queues
- Adding / Amending Routing Profiles
- Agent Hierarchy
- Security Profiles & Permissions
- Contact Flows

Agenda

Module 4: Reporting

- Call recordings and CTR data in SmartAgent
- Historic reports in Connect- Queues
- Historic reports in Connect –Agents

Module 5: Optional Other Modules / Enhancements available

- QA – Call Monitoring forms
- Case Management
- Social media
- Automated rules
- PCI Payments
- WFO/WFM
- CRM integration
- MS Teams

Module 1: Getting started

By the end of this module, you will be able to:

- Log in successfully
- Enable microphone and notifications
- Know how to access Connect from SmartAgent

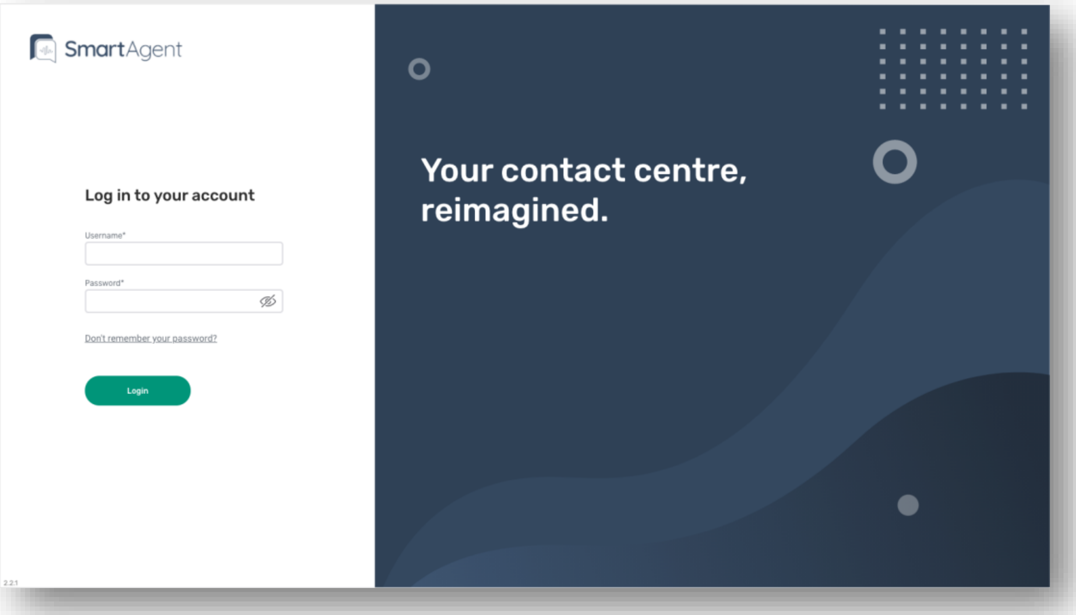
Accessing SmartAgent

SmartAgent must be loaded using Google Chrome or Microsoft edge browsers by opening the link supplied to your organization. You should ensure you have a USB headset attached to your computer.

You will also need to ensure you have a stable internet connection to make and receive contacts.

Logging in to SmartAgent using a Password

1. Open the SmartAgent application in your Google Chrome browser. You will be presented with the main SmartAgent log in screen.



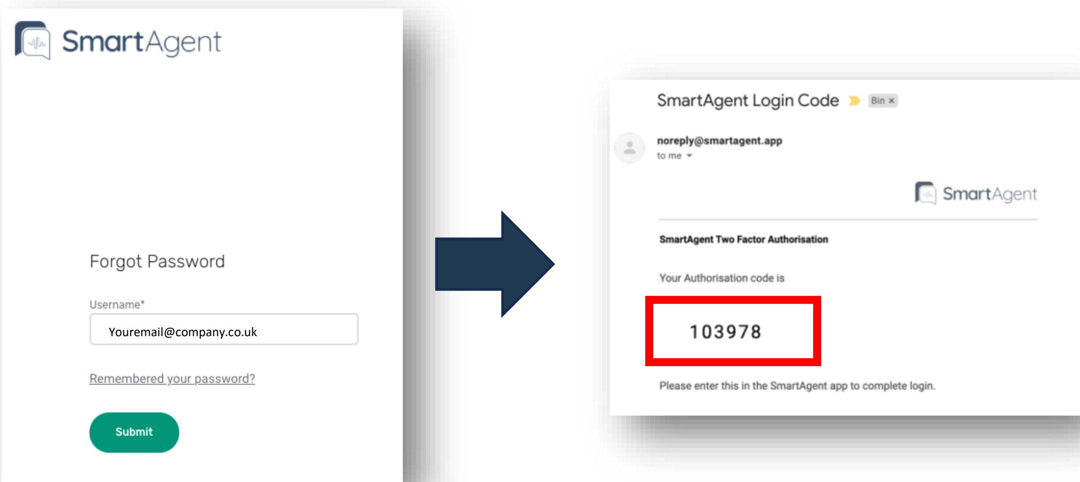
2. Input your username (this will usually be your company email address and may be case sensitive)

3. If you have been given a Password enter this in the password field, if not you'll need to reset your password. To do this click on the "Don't remember your password?" link

4. Click on "login" if you have a password.

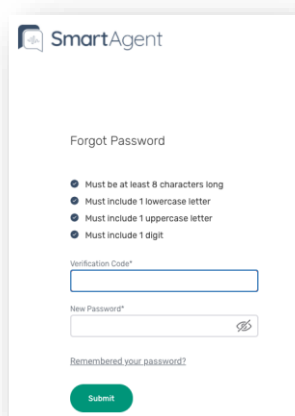
Resetting a Password

1. You may be prompted to change a password on the first login or if you select the "don't remember your password" link



2. Enter your username and click "Submit" – you will then either be sent an email or a text message with a verification code.

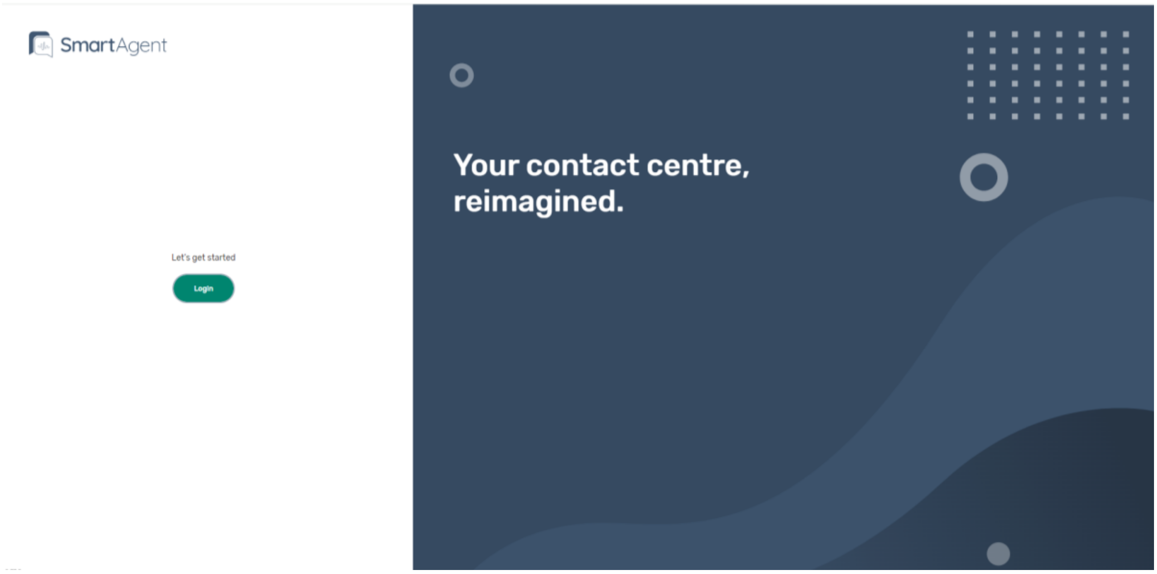
3. Enter the verification code and input a new password, following the onscreen guidance for the correct format of password.



Logging in to SmartAgent using Single sign-on

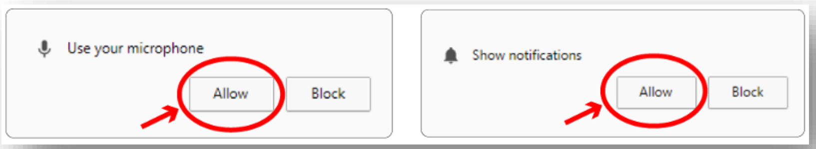
1. Once you have logged into your company platform, open the SmartAgent application in your Google Chrome or Microsoft Edge browser.

2. You will be presented with the main SmartAgent log in screen. Click Login and the screen will then Authenticate your credentials.



Notification & Cookies

The first time you login to SmartAgent you will get a couple of pop-up notifications, requesting access to your Microphone and permission to send you notifications.



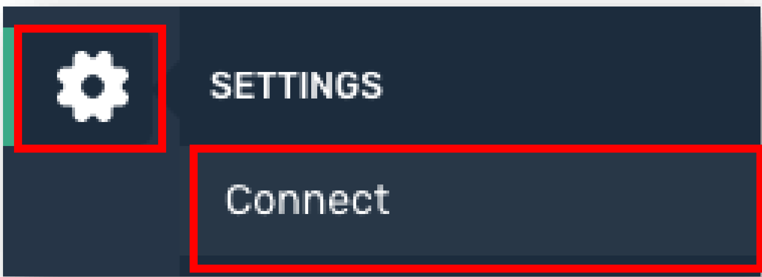
You should allow both of these pop ups.

You will also need to ensure that Third-party cookies have been enabled for your SmartAgent web address. This will normally be completed by your system admins.

Accessing Connect from within SmartAgent

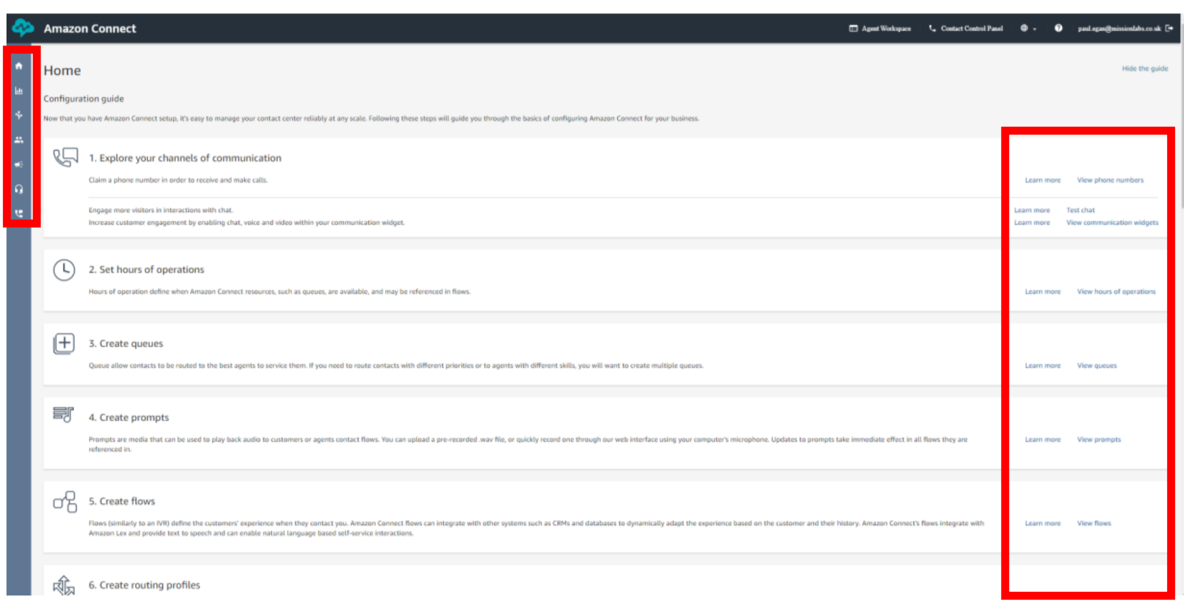
SmartAgent provides those with the relevant access level with a direct link to the Amazon Connect Console where all of your Amazon Connect settings and configuration are managed and implemented.

Select Settings in the left hand menu, then “Connect”



The Amazon Connect Console will then be launched in a new browser tab.

You can then make necessary changes in connect from the dashboard screen or using the menu listings on the left hand side of the screen.



Module 2: Maintenance tasks for admins

By the end of this module, you will be able to:

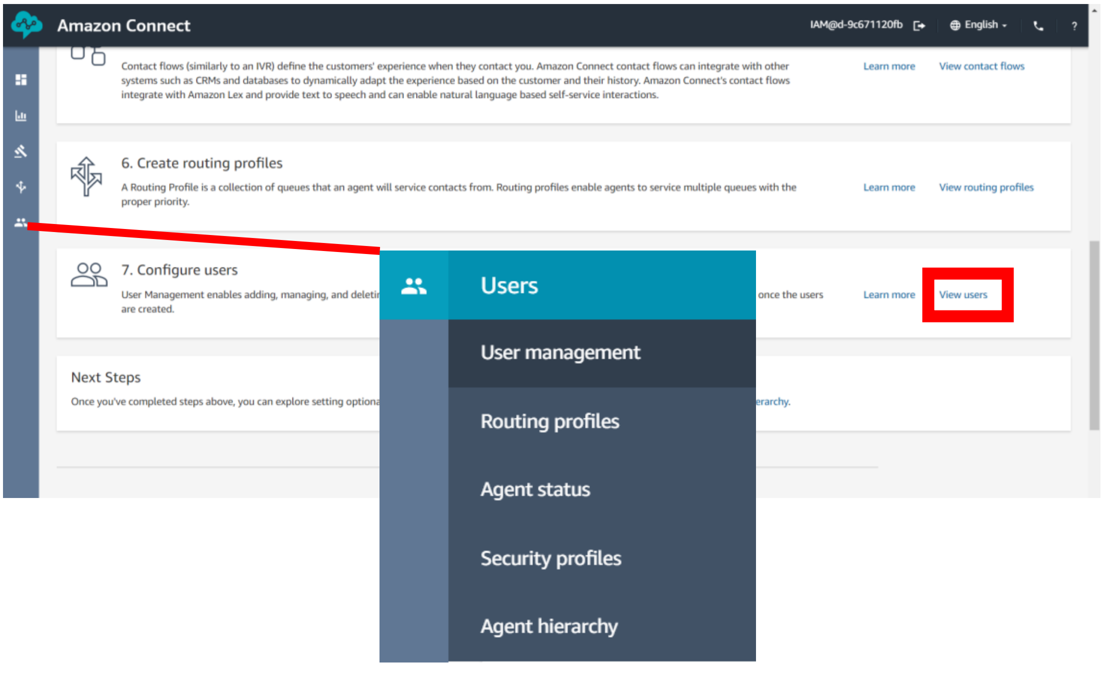
- Create, Amend and Suspend Users
- Public Holidays / Changing Hours of Operation
- Business Continuity / Welcome messaging in SmartAgent
- Amending Hold music or other recorded messages
- Amending Text to Speech messages
- Adding or Amending Agent Status Codes
- Adding or Amending “Quick connects”
- Managing Chat “Quick Replies”
- App Configuration screen
- Editing / Changing Contact Log settings
- Example Contact log settings
- Linking a contact log template to a Contact flow in Amazon Connect
- Channel Settings Configuration

Create, Amend and Suspend Users

All of these tasks can be done within the User management section of SmartAgent and this access can be given to users other than Admins in the system via their security profile. Guidance on this can be found in the Supervisor training module.

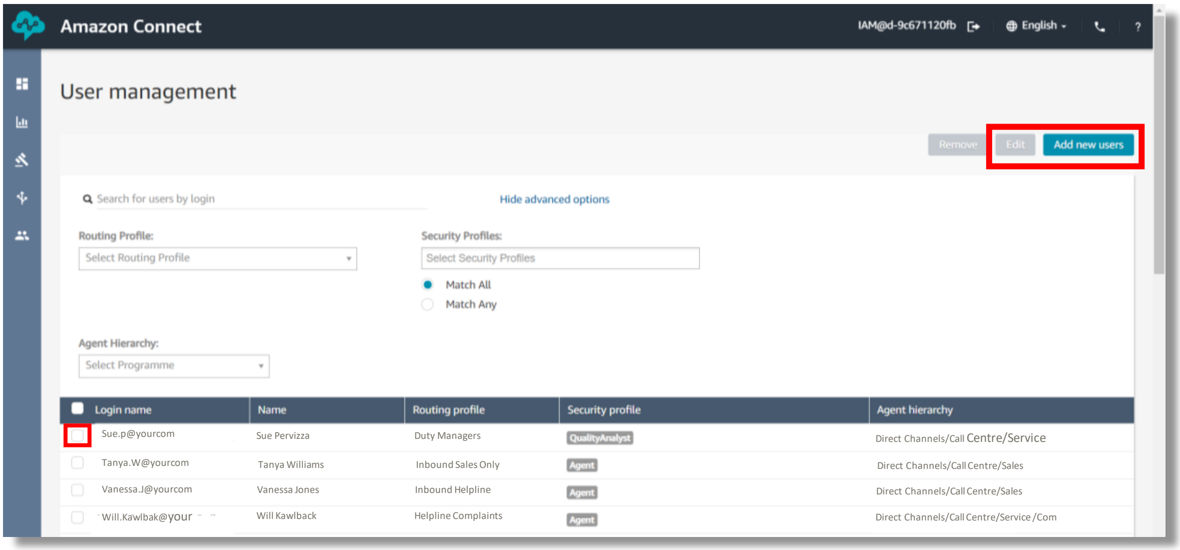
However as an admin you may prefer to use the Amazon Connect interface to create users as it allows you to make bulk amendments via CSV upload and has additional functionality such as adding in Agent Skill profiles if required.

Creating a new user, amending existing user details or suspending a user is all done through the User Management section within Amazon Connect. This can be launched from the dashboard by clicking on “View Users” link within the Configure Users section or by selecting User Management from the User menu on the left.

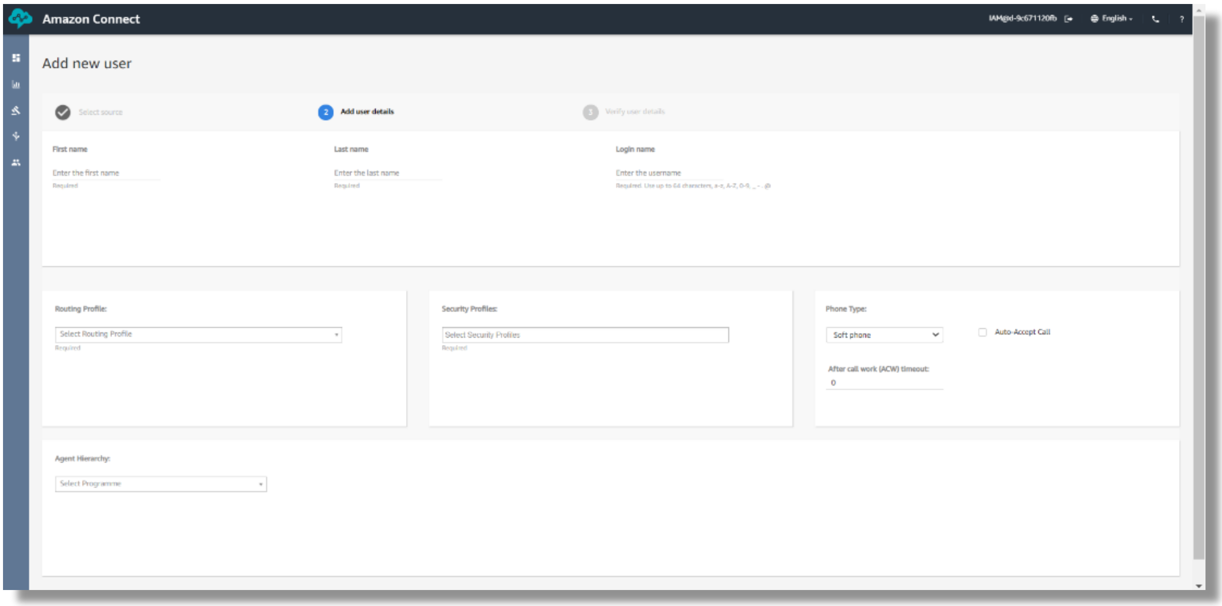


This will then launch a list of current users. This list can be sorted or filtered by Routing Profile, Security Profile or Agent Hierarchy as well as in simple alphabetical order by name.

To create a new user click on the "add new user" button and choose to either enter the details manually or in bulk via CSV format. Alternatively if you wish to delete a user just tick the box next to the user and the "delete" button will be enabled for you to use if required.



you are entering the details manually you will need to enter their name details and create a unique user login name.



You will then need to select from the drop down boxes their routing profile (what type of calls they will be receiving), Their Security Profile (their access level in the system).

Their Phone type (Soft phone allows them to use a PC to answer calls, A Hard Phone is an actual physical device).

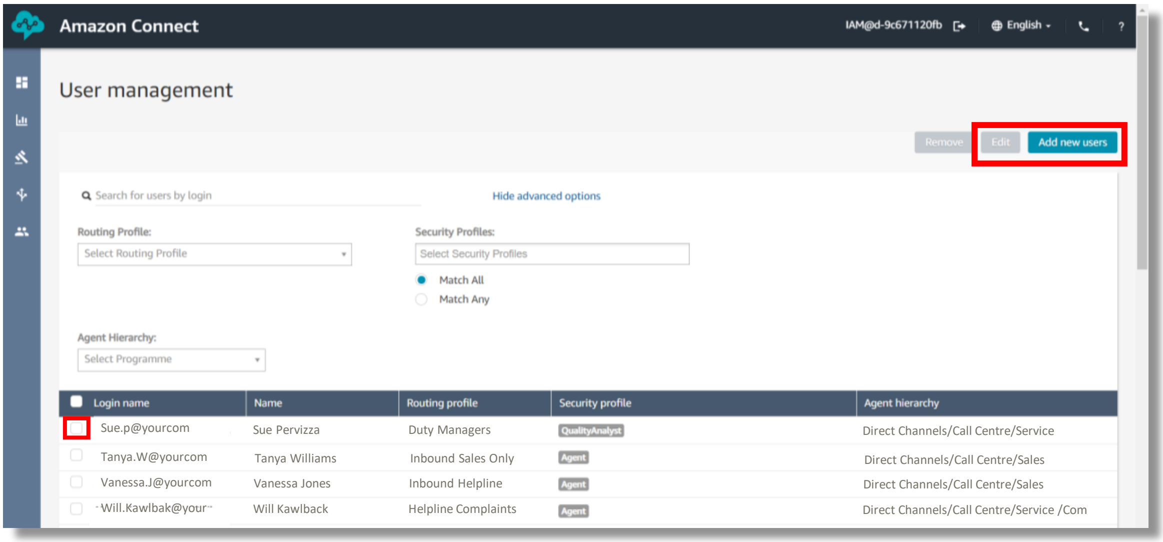
You will also need to put that user in the correct place in the Agent Hierarchy.
Agent Hierarchy maps the reporting of stats to particular individuals or teams in an organisation.

So if this new user was joining a particular team you need to place them in that team in the Agent Hierarchy.

Once you have completed the details you will asked to double check it and then they will be created as users in the system.

Amending / Suspending Users

You can make amendments to individual or groups of users by clicking the tick-box next to the users login name.

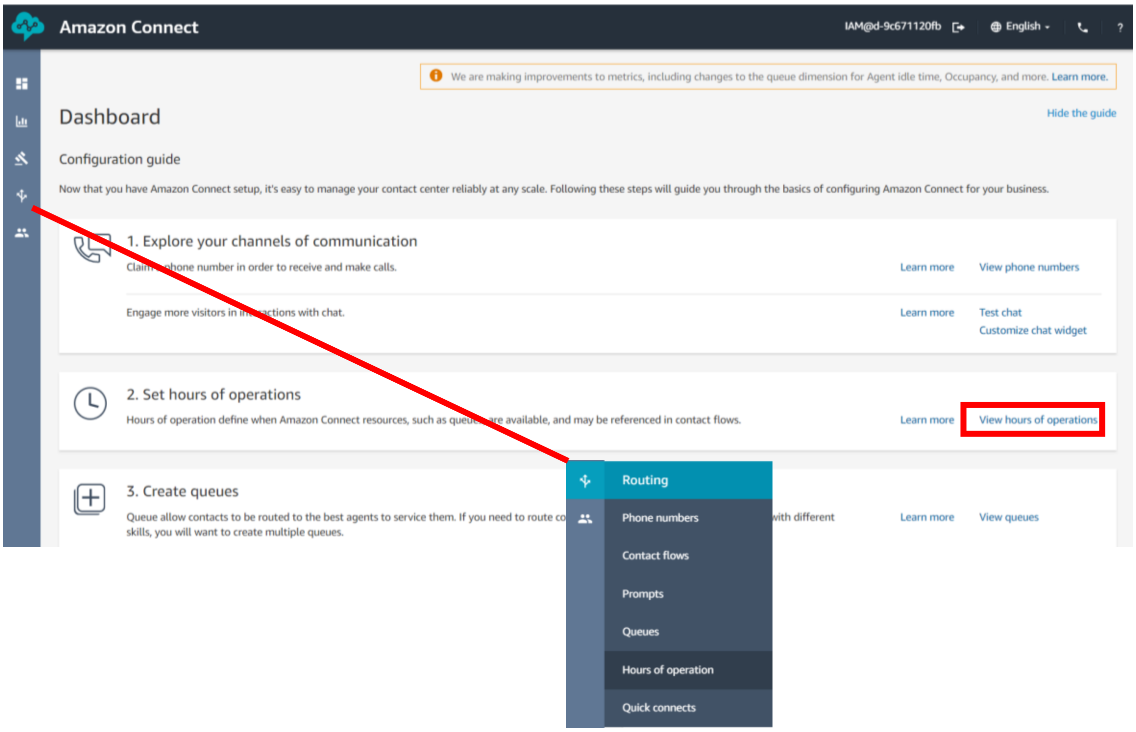


Once you have selected one or more users the "edit" button will become activated and you can press this button to make your changes.

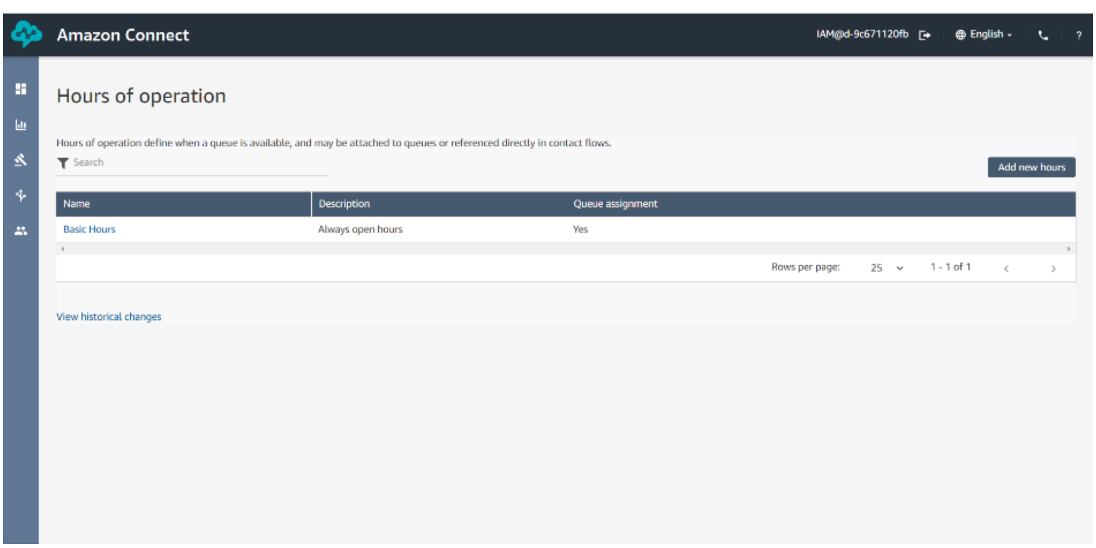
Once you have loaded up the users details you can then amend any of the fields by clicking into it if it is a text field, such as amending name details, or other fields will be amended by clicking on drop down buttons to select from pre-configured options, such as giving them an additional security profile or taking a security profile away which would suspend their access to receive or make calls.

Public Holidays / Changing Hours of Operation

If you need to amend your opening hours because of a Public Holiday or Planned closure then you can do this up to 7 days in advance by amending the Hours of Operation settings. These are accessed from the dashboard or from the routing menu.

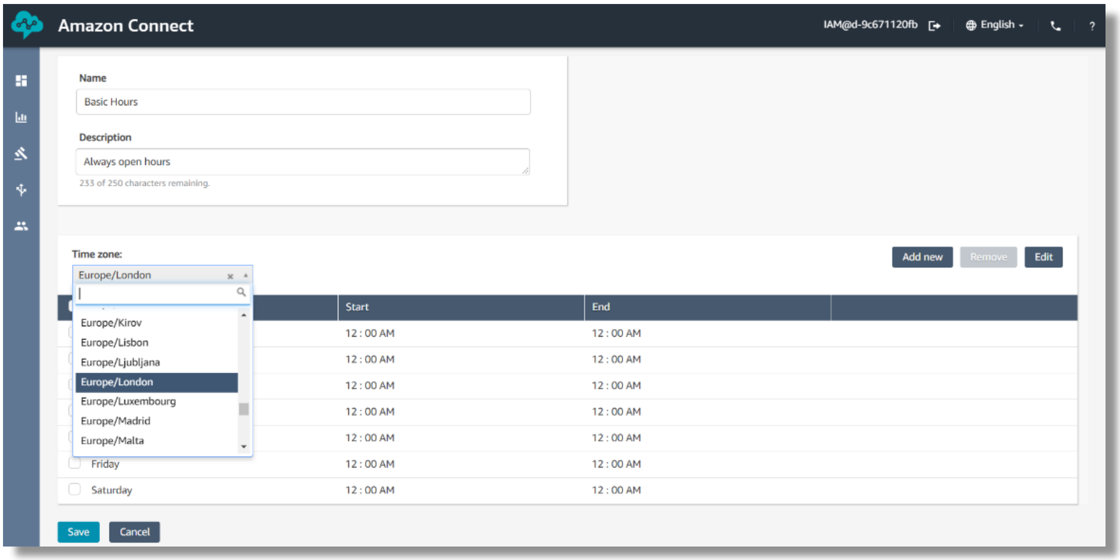


From the list select the Hours of Operation you wish to amend. You may have different Hours of operation for different offices or particular queues and they will all be listed together here.



Public Holidays / Changing Hours of Operation (Continued)

Click on the Blue text of the hours of Operation you want to amend and this will then bring up the detailed listing of hours of operation.



In this example the Hours of Operation are set to be 24 hours a day. It can also be configured to automatically handle changes such as when clocks go forward or back by selecting the Europe/London Timezone from the dropdown box.

If you don't want to make amendments for British Summer time because you have other offices overseas then you may want to stay on GMT as the timezone for example.

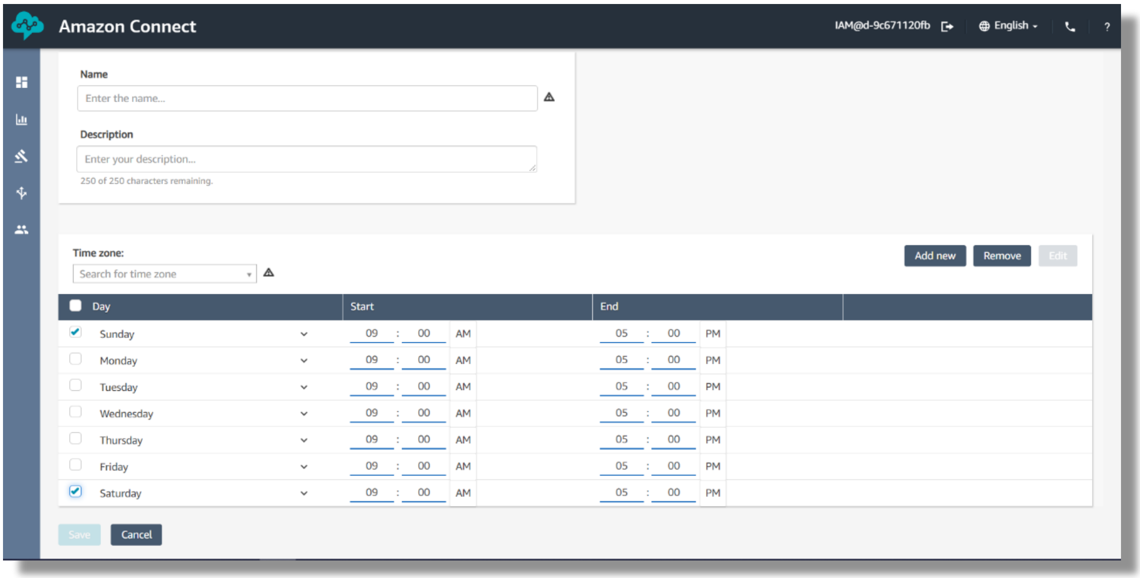
If your offices are not open 24/7 and will be closing for a public holiday then you can amend the Hours of Operation for that day ahead of time.

So, imagine you have a Bank Holiday coming up next Monday. Once your offices have closed for the preceding Monday you can then go into the Hours of operation and amend the Hours of Operation, ready for the following Monday.

You could choose to either tick the box next to Monday and select the "remove" button, or some people prefer to amend the hours of operation to be only open for a very short window at an unusually early time, say Start at 03.00am and finish at 03.01am.

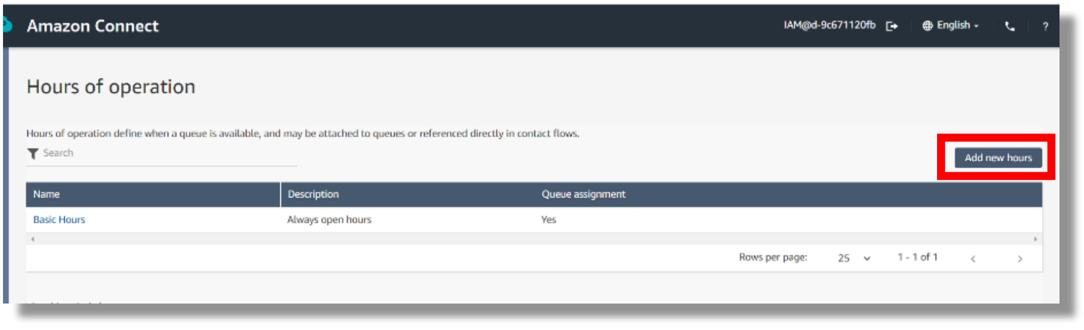
Public Holidays / Changing Hours of Operation (Continued)

You could choose to either tick the box next to Monday and select the "remove" button, or some people prefer to amend the hours of operation to be only open for a very short window at an unusually early time, say Start at 03.00am and finish at 03.01am so would amend the start and end times accordingly.



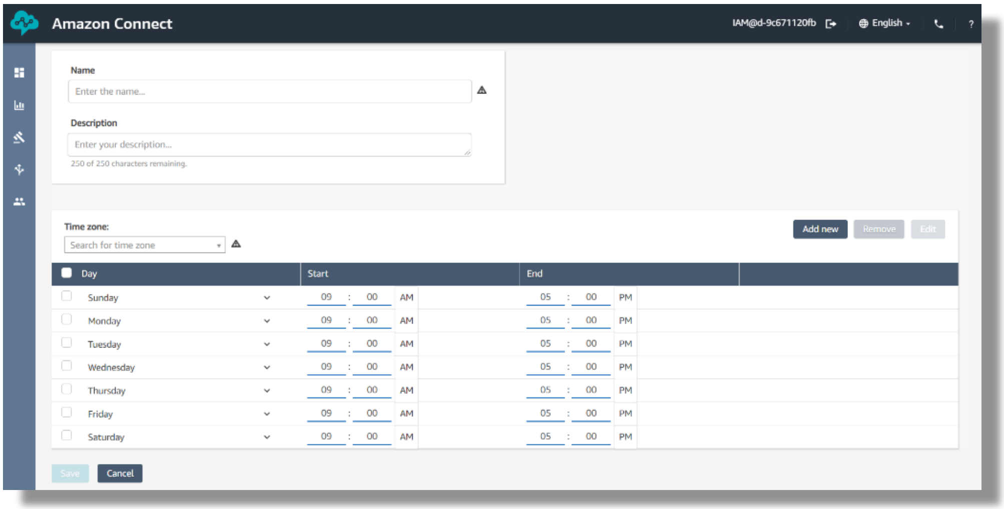
Once you have made the necessary changes you will need to save them and it's a good idea to set a reminder for yourself for the day after the public holiday, to go back in and set things back to normal otherwise the following Monday it will still be following the rules you setup for the Bank Holiday.

You can also create a Whole new Hours of operation if you need to from this area. Lets imagine you are going to use SmartAgent with a new department who only work Monday to Friday, 9am to 5pm, rather than your call centre staff. From the Hours of Operation screen, select the "Add new Hours" button. You will then be shown a blank template to create a new Hours of Operation.



Public Holidays / Changing Hours of Operation (Continued)

You will need to give it a unique name and a description. Select the Timezone, so choose an appropriate one for your organisation.



Then select the days and hours you want to apply. The default setting is 9am to 5pm, so in our scenario all we would need to amend is to select the Saturday and Sunday and click on the Remove Button, then save these new Hours of Operation.

However it's important to remember that, at this stage, we have just added this to the library of Hours of Operation.

When you look at the Hours of Operation Summary screen your new setting will be shown but it will show with a "no" in the Queue assignment column, as we have not assigned these hours to a particular queue or contact flow.

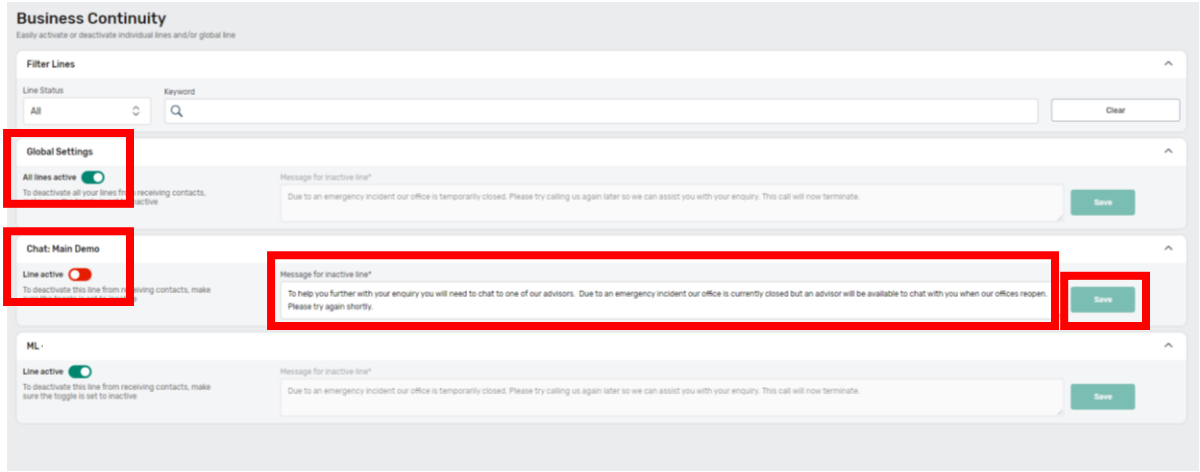
Business Continuity Settings

Whilst your admins may make changes in your systems Hours of Operation to cover planned interruptions in service, such as public holidays, in an emergency or evacuation situation it is essential that you have the tools available to make instant alterations to call routing and customer messaging.

SmartAgent provides a self-service Business Continuity screen to enable quick disabling/enabling of lines along with the ability to insert custom messaging informing callers for the reason for the calls being switched off.

If this feature has been configured for your setup and you have the access to it, you will find it in the Admin Settings menu under “Business Continuity”.

Each setup will be unique, but it will usually take the form of a global Switch-off option and then a sub menu of other options which may be based around location / brands or different activity types.



If the toggle switch is green, then lines / channels are active. If however, you get an unexpected situation, you can switch them off by selecting the toggle switch, turning it to red. You can then input a specific text message that will be played to customers while the lines are switched off.

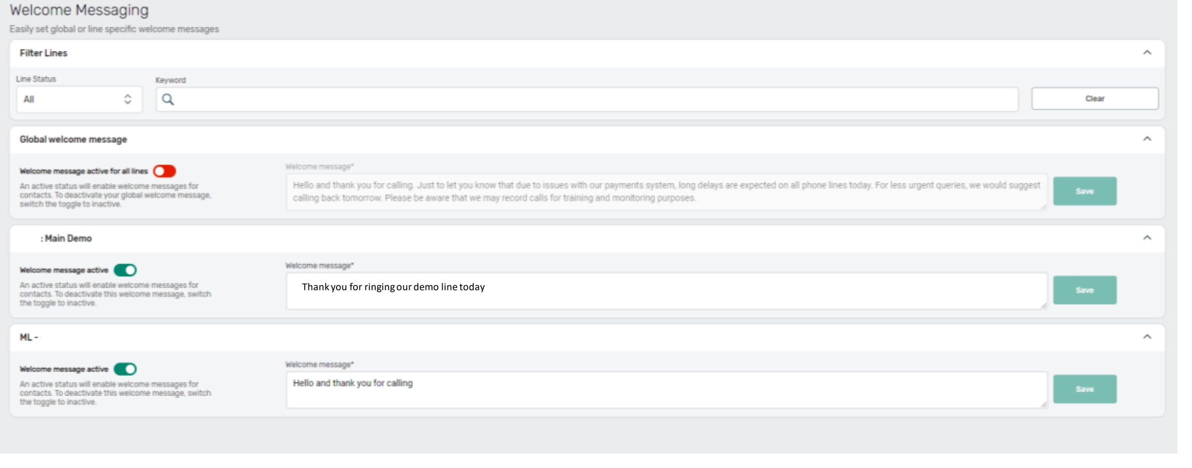
Once the emergency situation has passed you can simply toggle the switch to turn the particular grouping / activity back on again.

Welcome Messaging Settings

As part of your Organization's SmartAgent setup you will have a series of prompts and messages that are played to people in queues while they are waiting to be answered or as part of your customer journey through various menu options.

Your admins will be able to make any changes needed to these in Amazon Connect but some organisations want the ability to adapt these in the event of something unexpected happening.

If this has been setup for your organization and you have access, you will find this customized "Welcome Messaging" in the Admin Settings menu on the left.

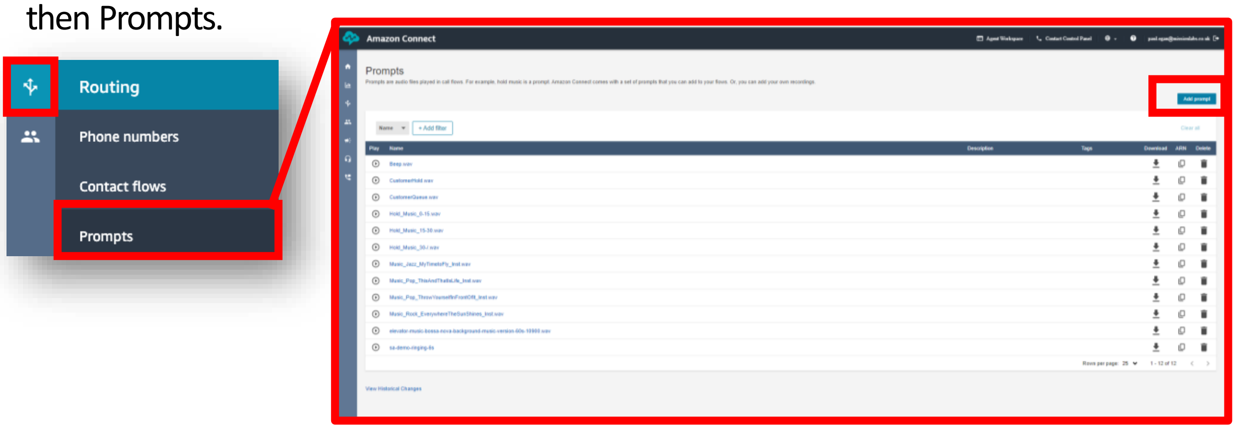


This will be unique to your organization but the setup will generally take the form of a "global message" that will be played over and above any other departmental level messages if enabled.

Sub messages can also be setup for particular departments / brands or channels. These can ONLY be enabled if the global message is switched off. The particular message can be entered into the text field and saved to provide an updated message, as needed, if a situation is changing dynamically.

Amending Hold Music or other recorded messages

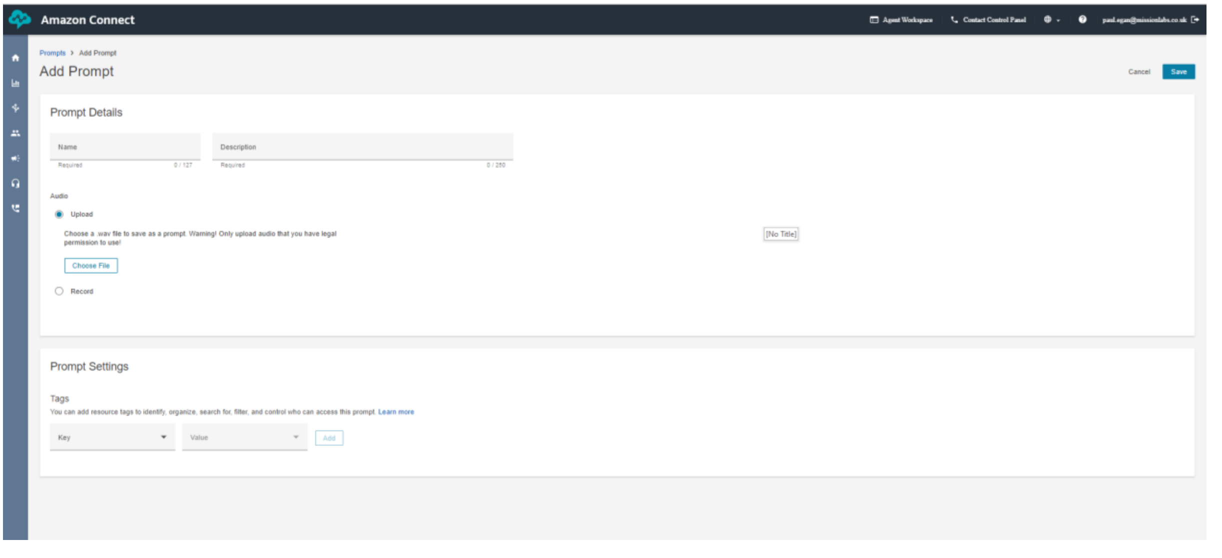
To view, create or edit prompts in Amazon Connect, select Routing from the side menu then Prompts.



Click on the "Add prompt" button at the top of the page.

Under the Upload option, click Choose file and browse to find the file from your computer. Please note that this should be a .wav file and no other file formats are supported.

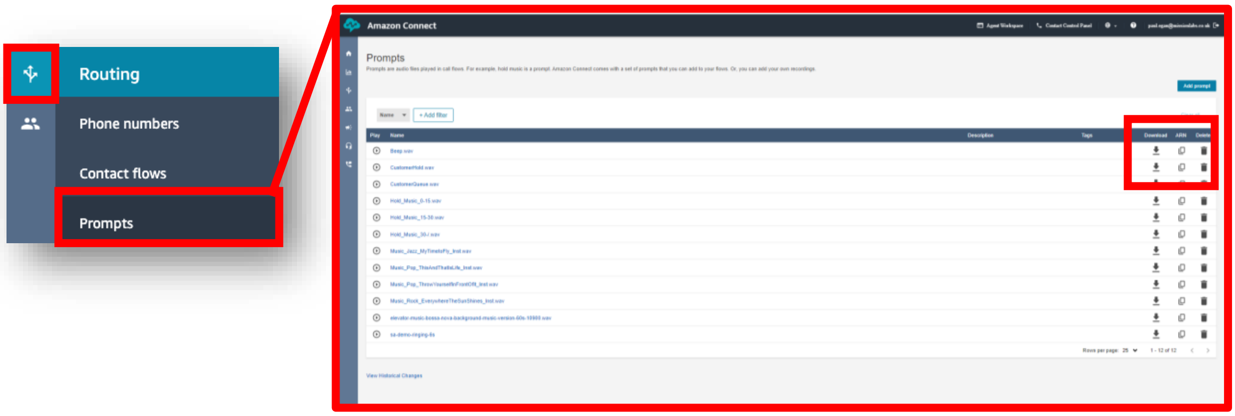
You can also select the "Record" option to manually record a message.



The name field will automatically be populated although you may want to edit this to ensure that your prompts are named consistently. Finally, click the Create button.

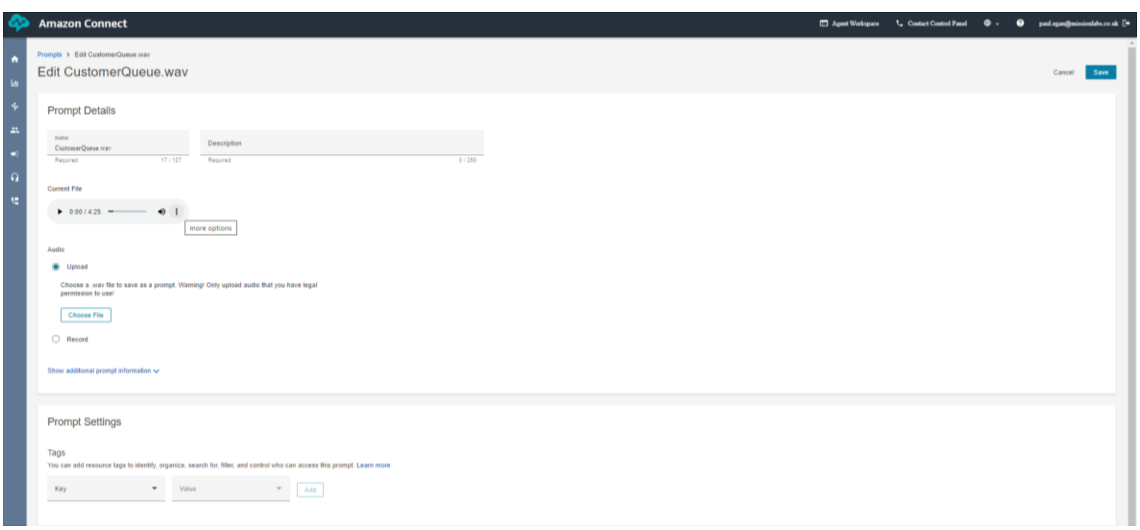
Amending Hold Music or other recorded messages (Continued)

Editing a recording against an existing prompt can also be done from the prompts screen. First select the prompt to expand it and show details.



Click the name of the prompt on screen and then you can edit the fields as required or download a new recording as needed. If you keep the same prompt name the new recording will be played in all associated flows.

The name of the prompt can be changed if required. Please note that this does not impact any contact flows which are using the prompt.



Finally, click on the Save button - this can take some time as the recording needs to be uploaded and converted to the correct format.

Amending Hold Music or other recorded messages (Continued)

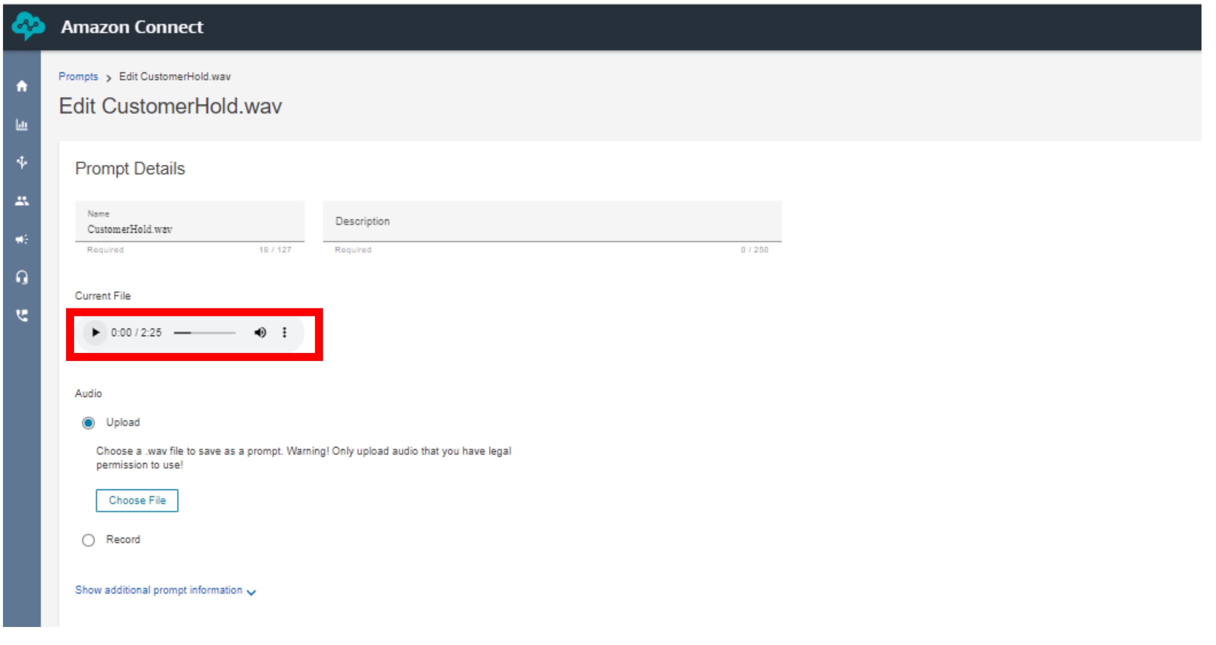
Verifying an uploaded recording

It's important that once you've uploaded a recording that you verify that the audio is an acceptable quality.

Due to restrictions on phone networks, HD audio is not supported so all recordings are sampled down to 8 KHz - this can dramatically impact the quality of music audio especially but can also impact voice audio.

Consequently, not all audio files would be deemed suitable to for use. To ensure quality, you must play the uploaded file to confirm that you're happy with the quality.

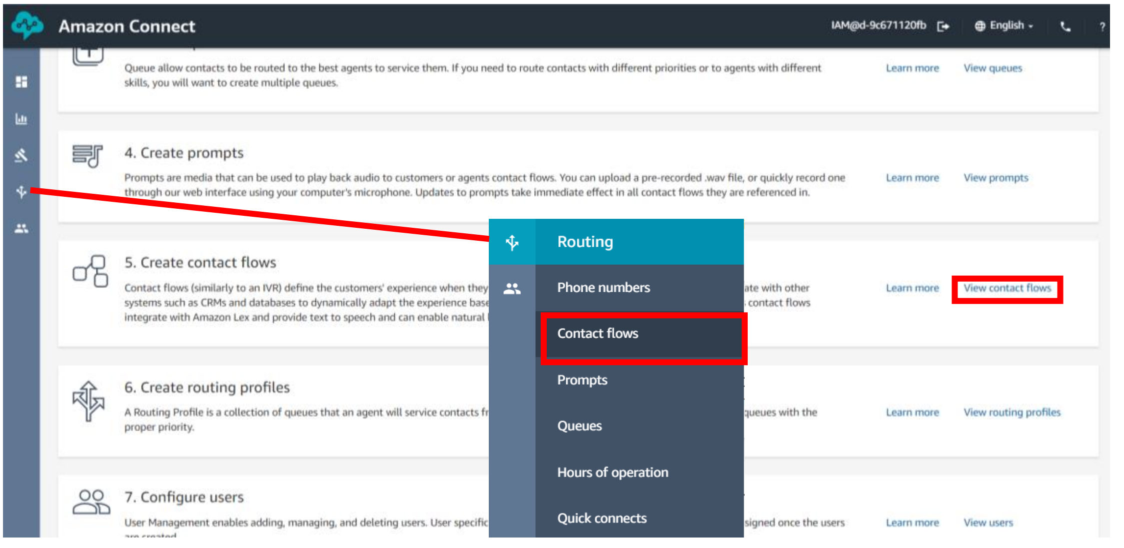
You can preview the audio recording by clicking on the name of the prompt you'd like to play to expand and show the prompt details



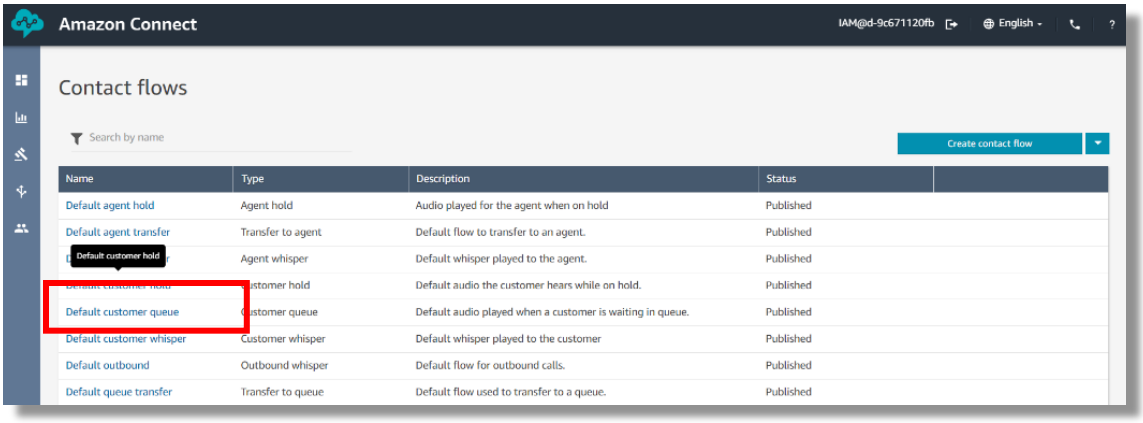
Click the Play button to preview the file. It may also be useful to run a trial of this prompt to ensure it sounds correctly when accessed via a phone line.

Amending Text to Speak Messages

If you want to amend the text in a text to speech section this can easily be done yourself by amending the prompt in the appropriate contact flow itself.

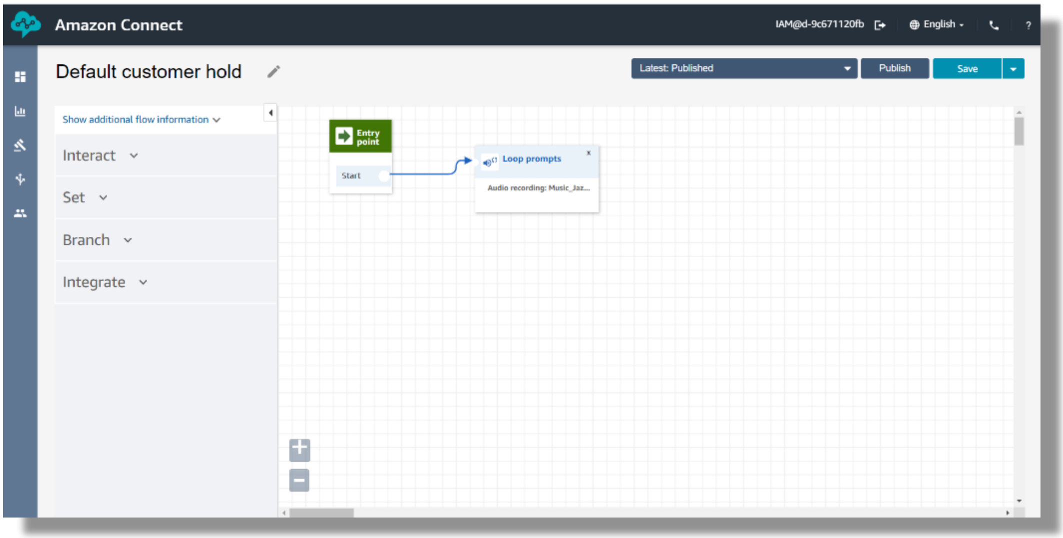


If you select the appropriate flow, from the list you can then click on the particular prompt that you want to amend, in order to show the details.

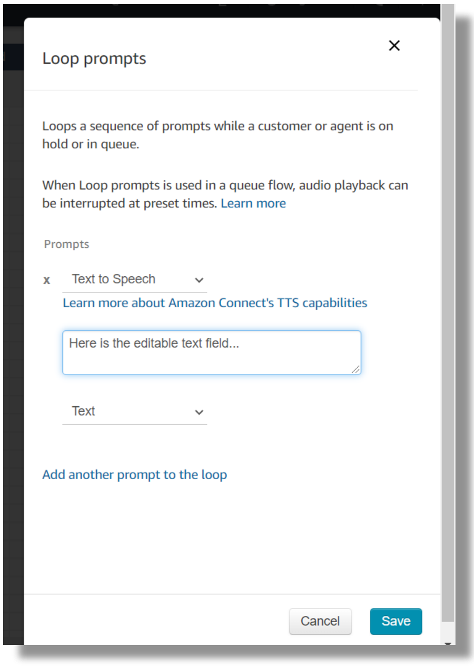


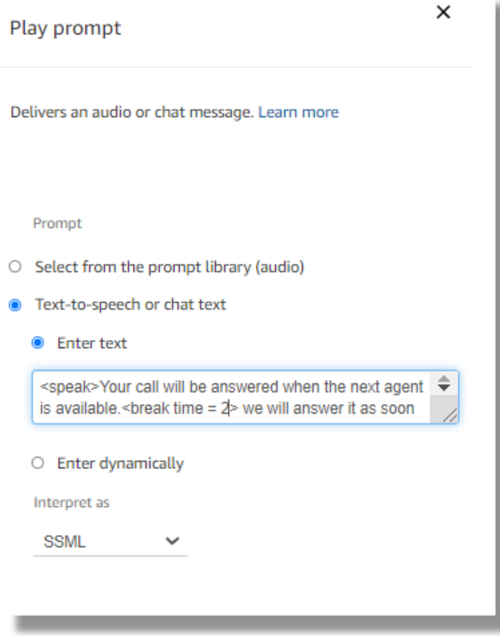
Amending Text to Speak Messages (Continued)

Within the details field you will then have the opportunity to amend the text to speech field with your revised text.



If you want to manually create pauses in a text to speech field then you would need to configure the settings to interpret as SSML and input a <break> command with a time value to suit your needs.





If you wish you can “save as” and create a completely new flow, that can be then tested away from your live service, or you can save and publish the amendment and this will then be live straight away.

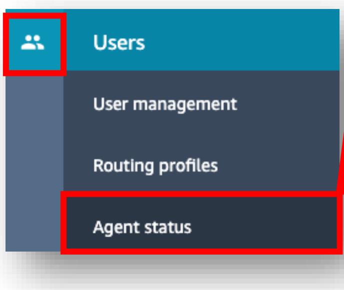
Adding, Amending and Configuring Status Codes

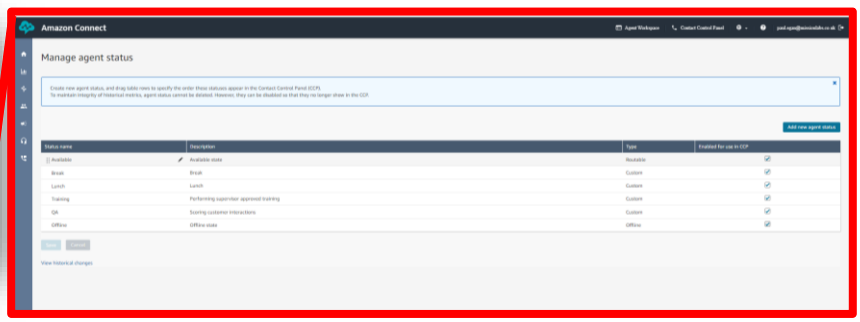
All users in Amazon Connect have an agent status recorded against them.

The 2 default status values are:
- Available - this means that inbound contacts can be routed to them
- Offline - this is the default status that is set against an agent when they first log in or out

In addition to the above, custom status values can also be added so you can track the activity of your agents during their shifts.

To view, edit and delete agent status values, select Users from the side menu then Agent status.





From here you can add a new status, edit existing values, disable a status and also re-order them. Agent Status codes can't be deleted as they may have data associated with them, however Status codes can be Disabled for use by unticking the "enabled for use in CCP" box. This means Agents will no longer see them.

Click the Add new agent status button and a blank row is added to the top of the page.

Enter a name and description and click Save.

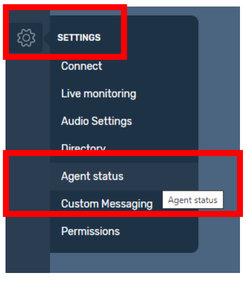
Values can be re-ordered by hovering over the row and dragging the icon displayed to the left of the row. The order is then reflected with SmartAgent and Amazon Connect.

If you no longer need to use a status, then uncheck the Enabled for use in CCP option.

Finally, click Save when you've made all your changes.

Adding, Amending and Configuring Status Codes (Continued)

Within SmartAgent you can configure the Status codes with an expected time value. This will mean that if a time value has over-run the time status will appear in red on Supervisors Realtime Metrics screen, highlighting that an Agents break has over-run for example.



If you go to Settings Menu and select Agent Status you will see a list of all currently enabled status codes. If no time has been set click into the status code and enter a time value in Minutes.

You can edit or clear these values by clicking on the three dots on the right of the status code.

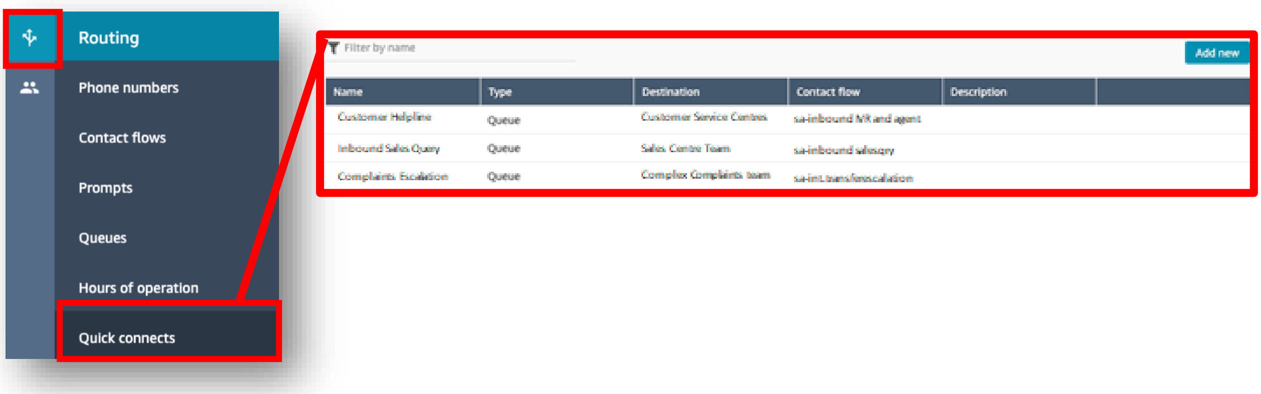
Adding, Amending "Quick Connects"

Quick connects are a way for you to create a list of destinations for common transfers. The type assigned to a quick connect determines it's destination

- External - this is a phone number external to Amazon Connect. This supports both outbound calling and transfers.
- Agent - used to transfer an existing contact to a specific agent
- Queue - used to transfer an existing contact to a specific queue

You can have one generic list of Quick connects and apply this to all Queues, or you can have multiple different Quick Connects Listings that are specific to a particular set of queues to handle different regions or departmental arrangements.

To view quick connects, select Routing from the side menu then Quick connects.



From here you can create a new quick connect or edit an existing one. Please note that once you've created a quick connect it cannot be deleted - only hidden from agents by removing its assignment to queues.

To add a new value, click the Add new button to display a blank row. Add a name, select a type then specify the destination for that type.

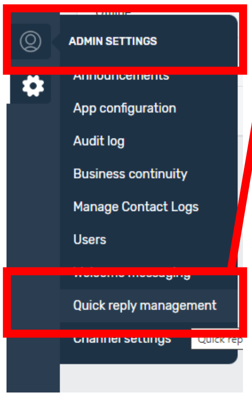
Next you must supply a contact flow for agent and queue types. Select a flow from the dropdown and finally click Save.

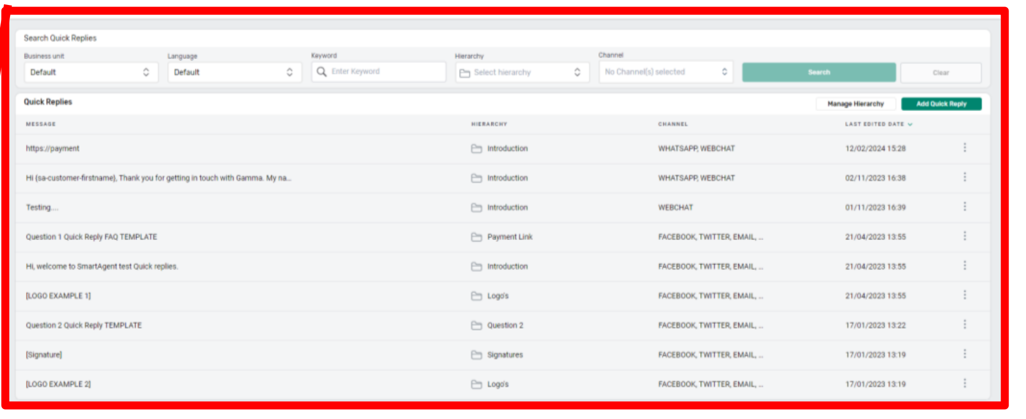
Editing a value follows the same process as above.

Any new quick connects will need to be associated to Queues for them to appear to Agents.

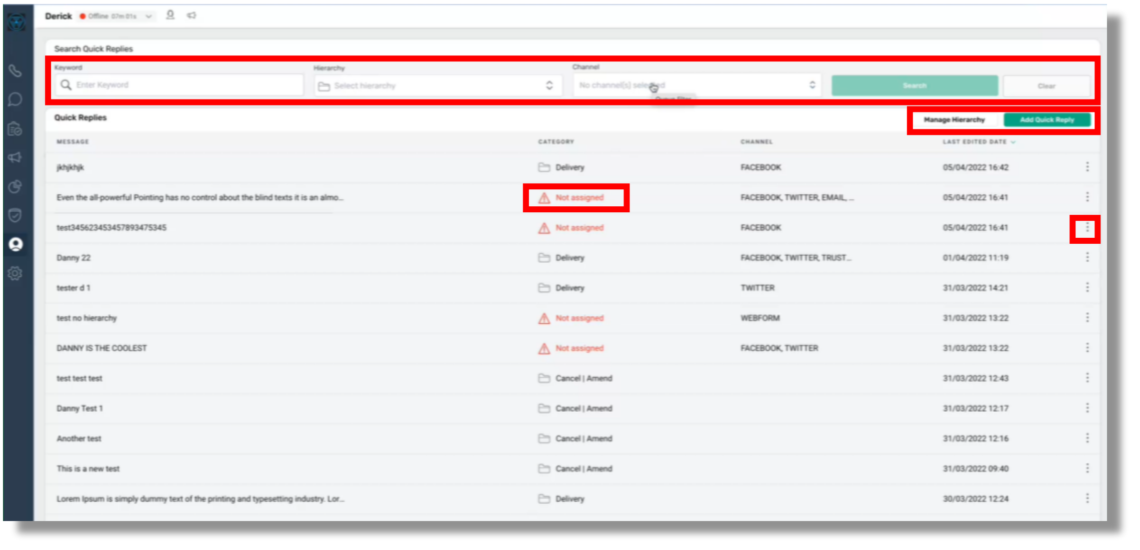
Managing Chat "Quick Replies"

Quick replies in Chat are a way to have some pre-prepared responses that agents can then adapt to personalise the message to clients. These can be organised and categorised within SmartAgent by users who have the necessary access within their security profile, if chat has been enabled within your setup.





Quick Reply Management can be accessed from the "Admin Settings" menu, and will launch the Quick reply summary screen, where you can search for current quick replies by Keyword, using the hierarchy and category you have setup, or by channel.



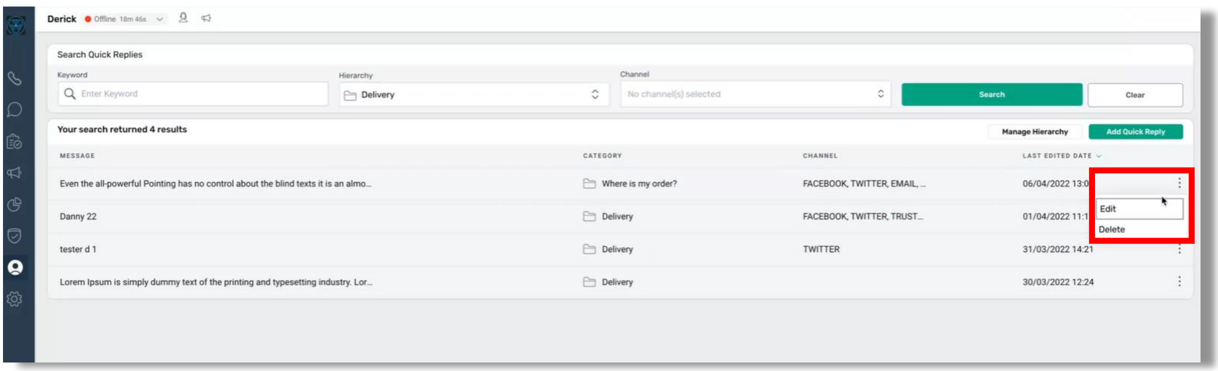
You can also create a new quick reply from this screen by selecting the "add quick reply" button.

If you want to make changes to your hierarchy or category structure then you can do this by selecting the Manage Hierarchy button.

Managing Chat "Quick Replies" (Continued)

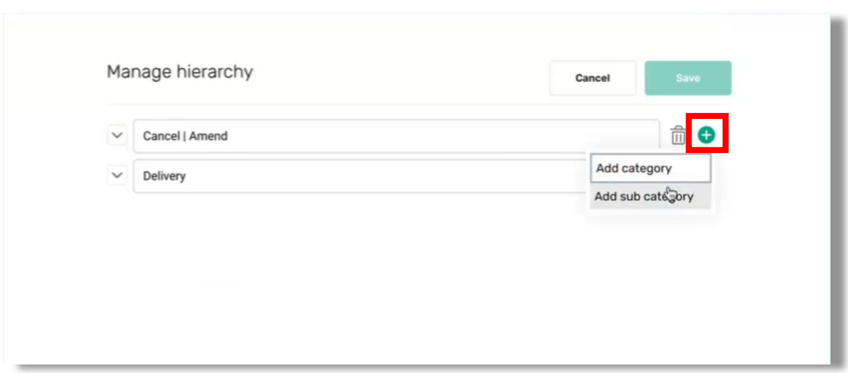
Any Quick replies that have not been assigned to a category will be highlighted with a red warning triangle. **Unassigned quick replies will not appear to agents when they use the quick reply function**, so you can use this functionality to archive any old replies, or to work on draft messages until they are ready for use by agents.

You can also select the three dots on the right hand side for quick links to edit or delete a quick reply.



If you select the Manage Hierarchy button you will be able to create a tree-like hierarchy of categories and sub-categories to help you organise your quick replies.

Agents can search for quick replies using a keyword search, but you may find using a system of categories can ensure consistent messaging, particularly if different departments or channels might utilise different messages.

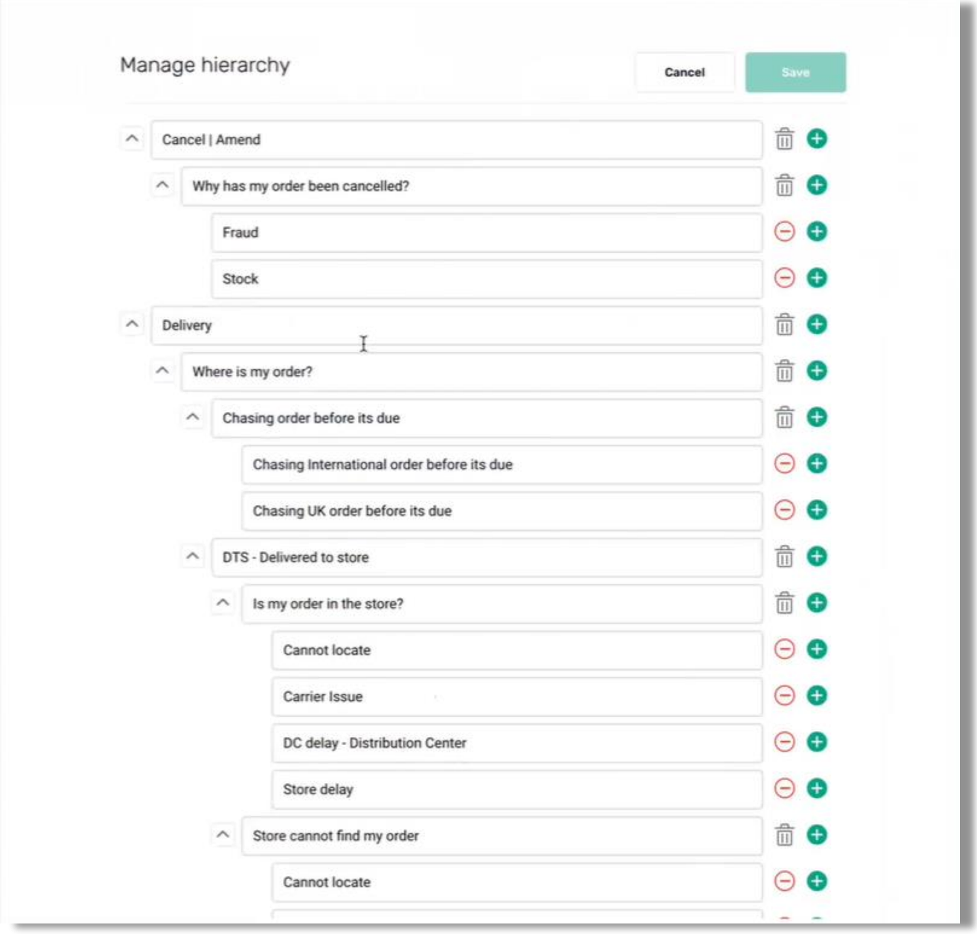


To add a new category, select the green Plus sign and then type in what you want this category to be called. If you want to create a subcategory under one of your existing categories, select the green plus next to that category and select the sub-category option.

Managing Chat "Quick Replies" (Continued)

The sub-category will show slightly indented from the category so you can see where it fits in the hierarchy.

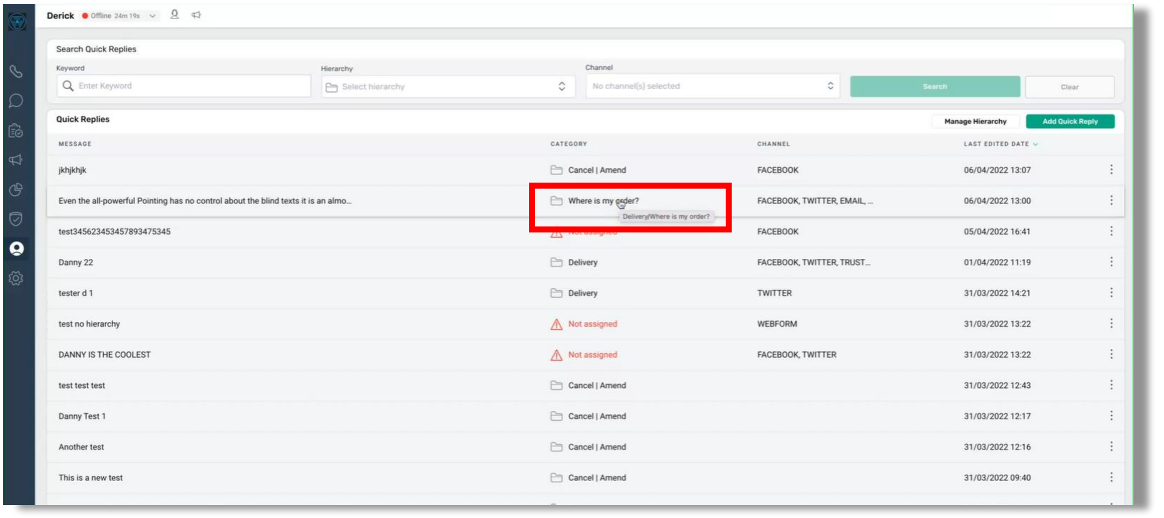
You may want to consider using a particular naming convention for these categories as **you cannot have duplicate names at the same level of the hierarchy**.



So for example, you can't have 2 categories called "Delivery". However, you can have the same name for sub-categories, as long as they are in different categories. So, each "Department" category, could have a sub-category called "delivery" as these would have a unique name combining the category and subcategory.

Managing Chat "Quick Replies" (Continued)

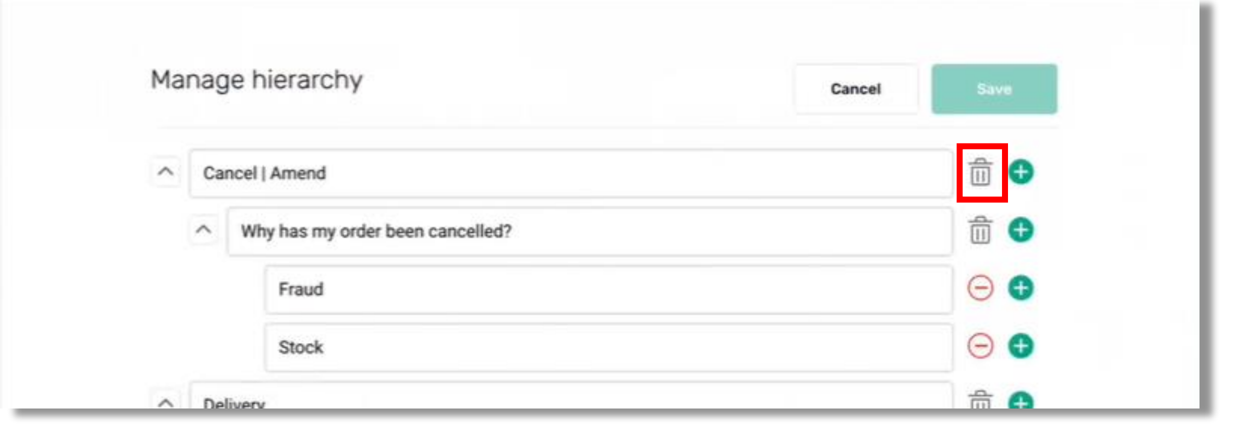
This unique address or breadcrumb trail can also be shown if you hover over a quick reply on the summary screen.



Within the Manage Hierarchy screen you can also delete categories or sub categories by selecting the bin icon next to the category or sub category.

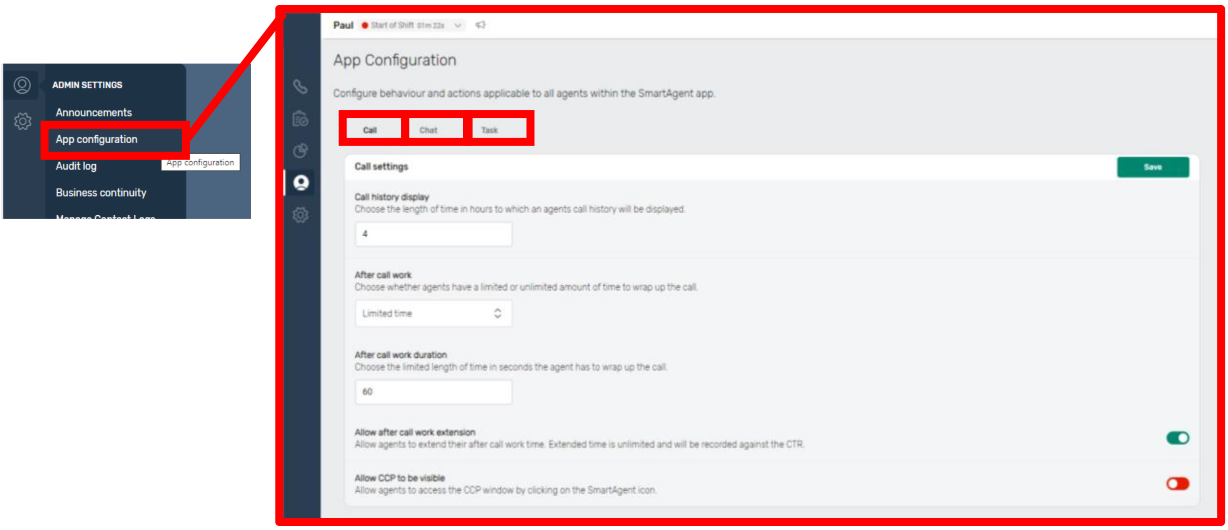
You will be able to delete a category or sub category, even if it has quick replies stored within it. These quick replies will appear in the summary screen as "unassigned" so they will not be lost, however it means they will also disappear from Agents view.

So you may want to assign Quick replies to a different category or sub category before deleting the old category.



App Configuration Screen

Within the App Configuration screen you can change how After Contact Work (ACW) is handled across different channels without having to make changes within the Amazon Connect system. Any changes on this screen will apply to all agents within the smartagent App.



There are configuration options under each tab for channels in a SmartAgent setup. So, for example, you can input a time limit of hours to which an agents call history will be displayed for voice.

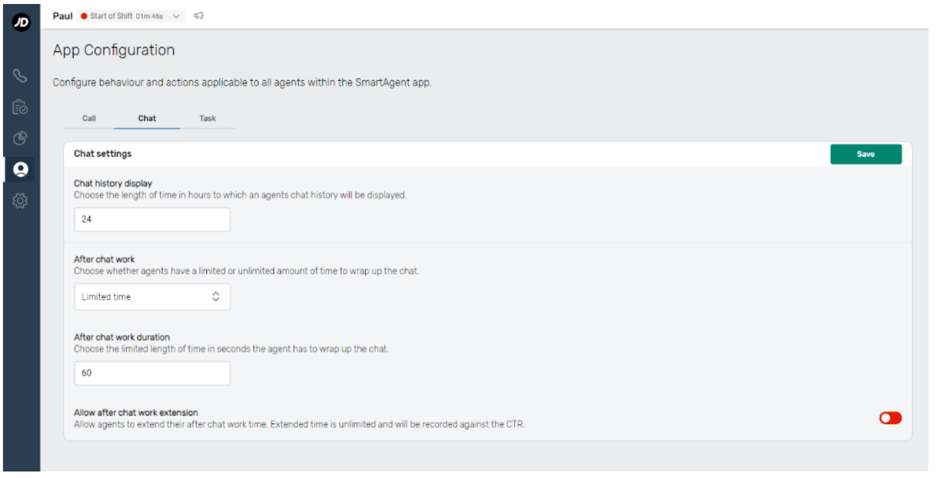
You can choose to give Agents an Unlimited time to complete after call work, or set it to “Limited Time” and then set a duration in seconds.

You can also toggle between allowing agents to “extend” the ACW time (this will then be unlimited) or to not have the “extend” button appear onscreen.

The final section “Allow CCP to be visible” allows agents the ability to view the Amazon Connect CCP window by clicking on the SmartAgent icon. This may be of use in troubleshooting as it allows Agents to be able to download contact logs and share them with your IT providers.

App Configuration Screen (continued)

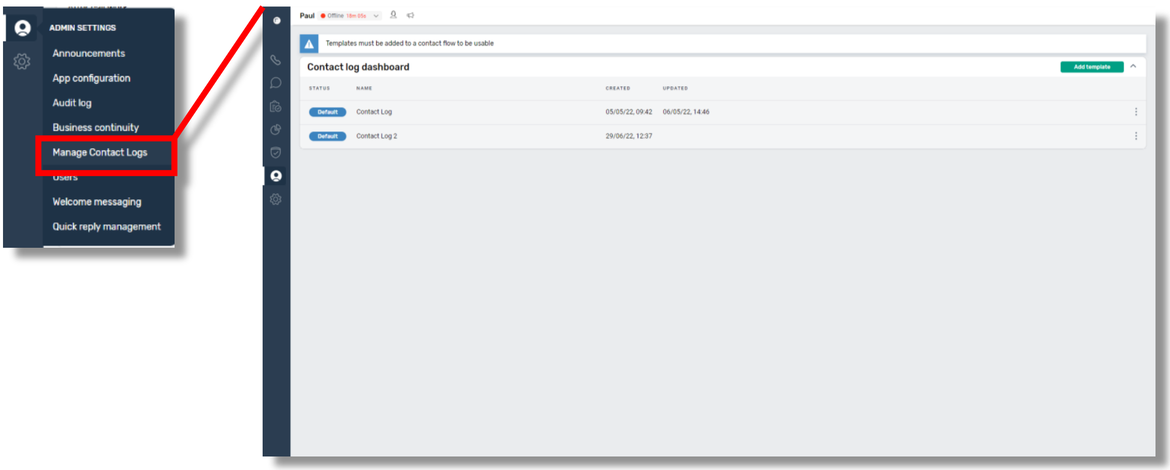
You can have different settings for other channels by using the tabs for chat and task.



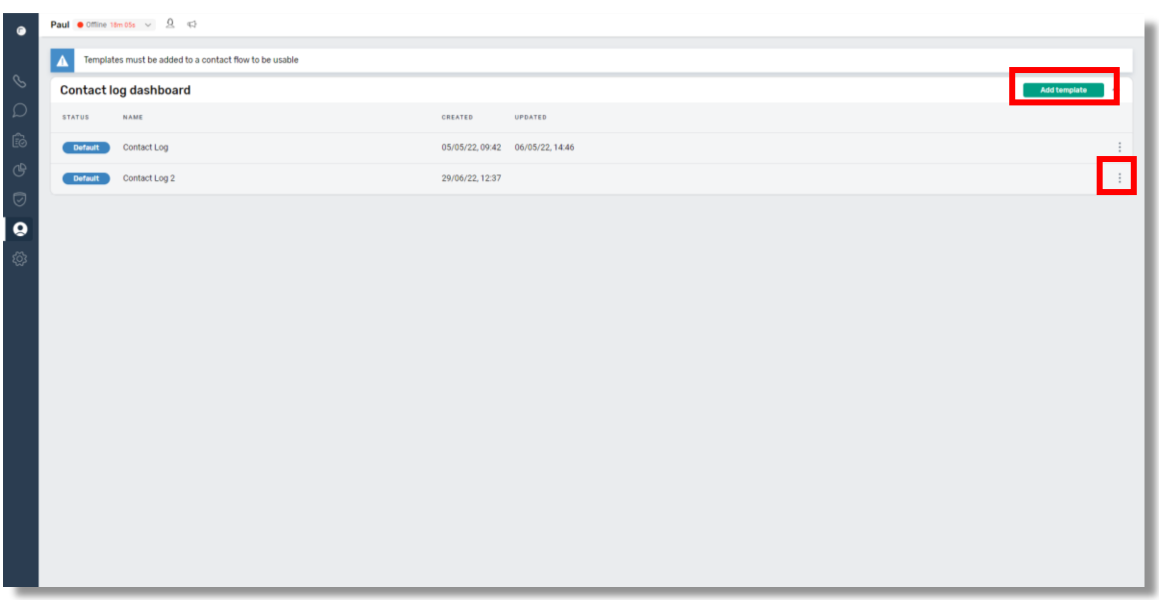
Settings for ACW on this page will act as default settings, however you can specify that other settings are followed as detailed in Contact Log Management.

Editing / Changing Contact Log Settings

Within the admin settings menu you can access the contact log dashboard which shows any current contact log configurations built for your system and their status. Any contact logs marked as “default” status will be the one that any contact will revert to if a contact log configuration is not specified in the Contact flow.

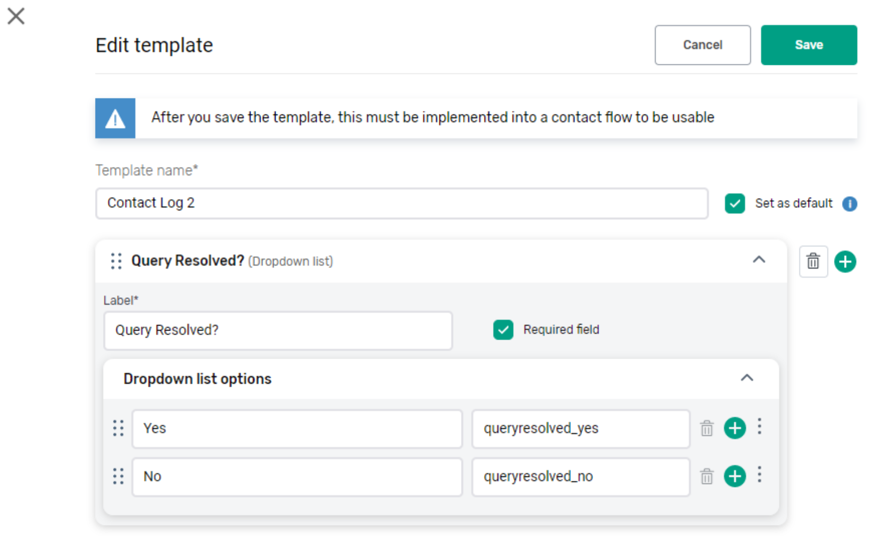


From this screen you can edit or delete any contact log configuration by selecting the three dots next to the specified configuration and also create a new template by selecting the Add template button.



Editing / Changing Contact Log Settings (Continued)

If you select the "edit" option then the Edit template screen will appear as shown below.



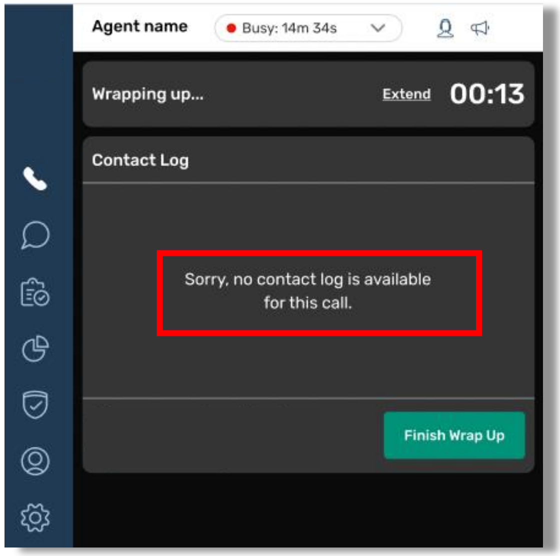
This will contain all the existing elements within the contact log and will allow you to make any necessary changes.

Template Name / ID number
You should bear in mind that any changes made to this may affect how the Contact log appears to agents as this will have been configured within Amazon Connect contact flows, so it may be useful to test this within a UAT environment before making changes in a live environment. We would also recommend using an agreed naming convention to make it clear what each configuration is used for.

Set as Default
The default Contact Log will be the one that any new contact flow created will use, unless a specific contact log configuration has been specified.

If however it has previously had a specified / named contact log configuration that is somehow broken, eg by amending the name or ID number, then an error message will appear to agents as below..

Editing / Changing Contact Log Settings (Continued)

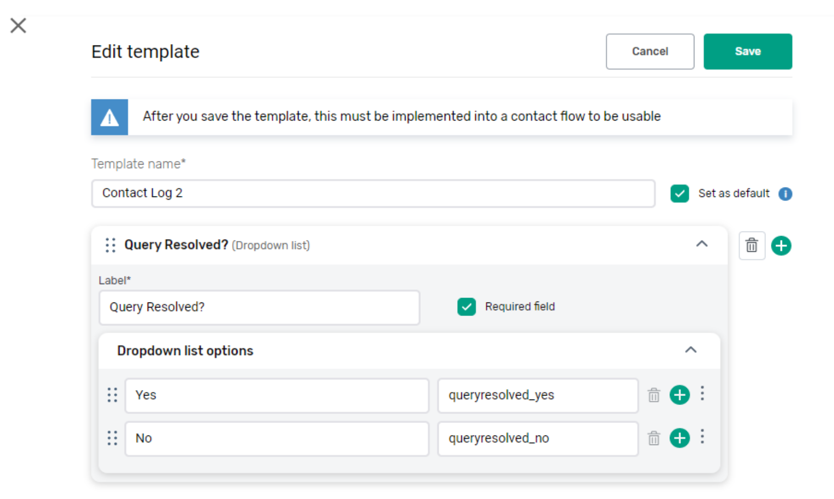


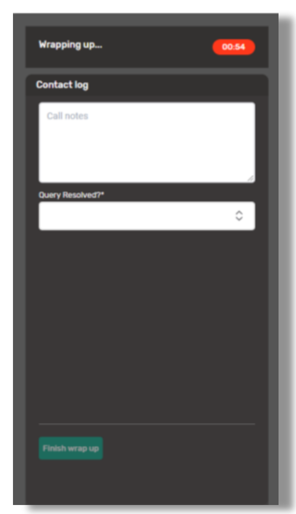
Wrap time Limit / Allow time extension

Within the contact log configuration you can set specific options for Wrap time limit / allowing agents to extend the time. These settings can be independent of the settings on the overall App configuration settings if this configuration is applied to a particular contact flow – eg giving a complaints handling team longer to complete ACW because of the nature of the calls they receive.

Adding or editing a section of the contact log screen

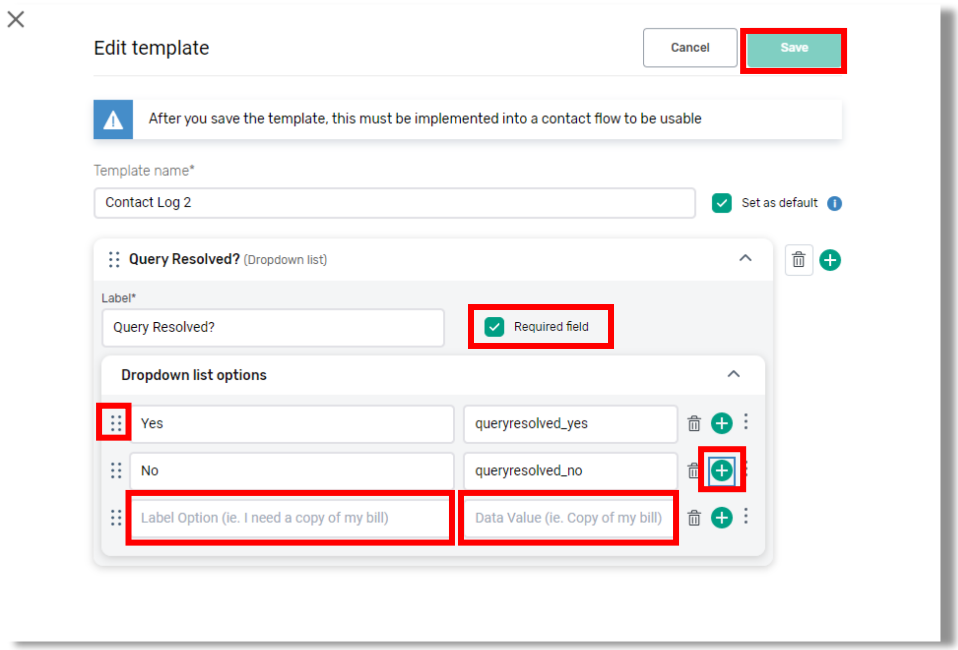
Let's say a company initially just wanted a simple Query resolved Yes / No option to appear. An example of that is below, and how that might look to an Agent. However if the company setup an escalation process to a specialist team, they might want to be able to track this, so would want to maybe amend the contact log screen.





Editing / Changing Contact Log Settings (Continued)

So they could select the green "Plus" symbol to create an additional option for the Agent to input. This would then need a new Label option – namely what the Agent would see and a "Data Label" field. This field would appear in the CTR record and then be reportable / extractable for reporting purposes.



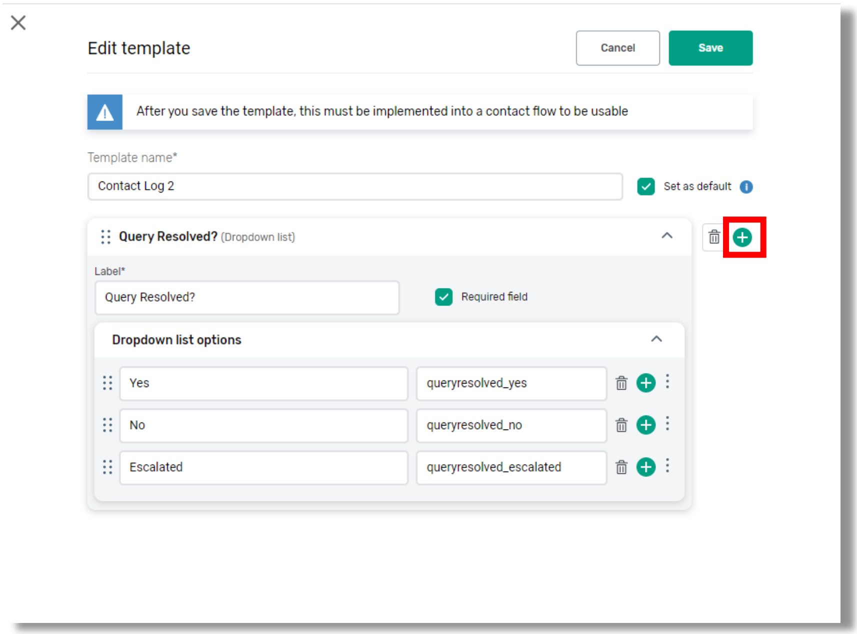
The order in which these are presented can be amended by dragging and dropping the option using the six dots at the side of the option.

You can also specify if these question is a required field – namely the Agent has to complete it before being allowed to finish ACW.

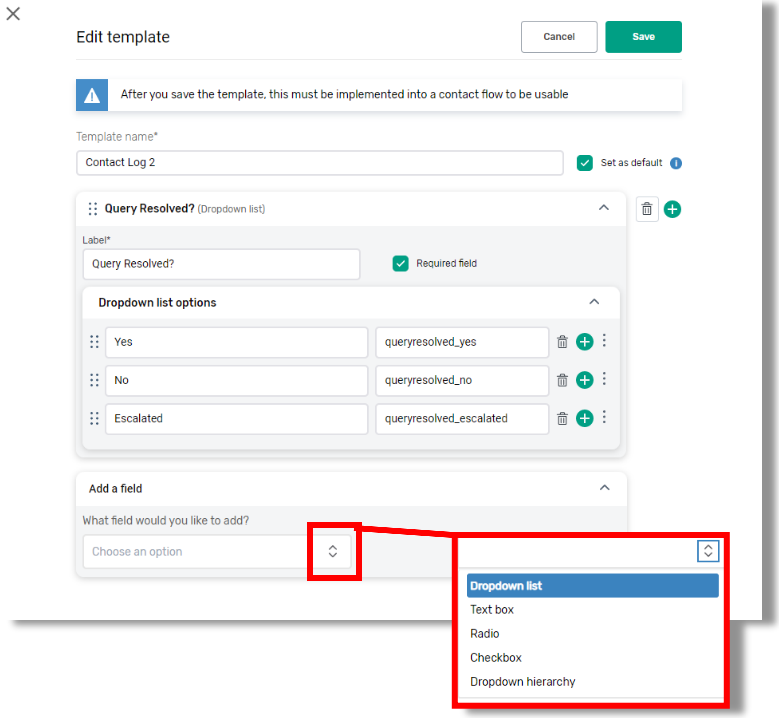
So the person would input these details and hit "Save" to complete these amendments.

Editing / Changing Contact Log Settings (Continued)

If however, they wanted to add a whole new section they can select the green plus next to the Field label title.



This will then present them with a dropdown menu to select the type of additional field to add.



Editing / Changing Contact Log Settings (Continued)

A “Dropdown List” will allow Agents to select an option from a defined list, just as the above list appears with full data labels.

A “text box” will allow Agents to input free format text within the section.

A “Radio button” will allow Agents to select one option from a list of radio buttons presented.

A “checkbox option” will allow agents to select multiple options from a list of checkbox options.

A “Dropdown Hierarchy” will allow agents to select a data label from a Hierarchy of options that can be configured, particularly suited to larger and complex organisations. We will cover this in detail in a later section.

“Date Picker” – this will create a dropdown calendar option with a text box to enter details for the calender such as “Date of next appointment”

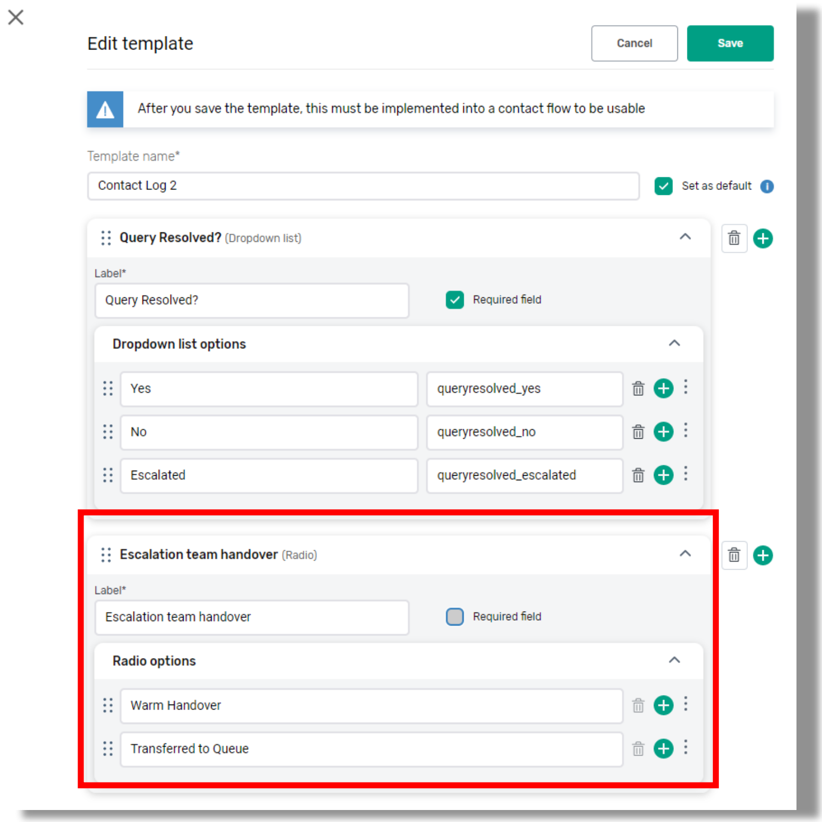
“Time Picker” – this will create a dropdown time option with a text box to enter details for the time such as “Time of next appointment”

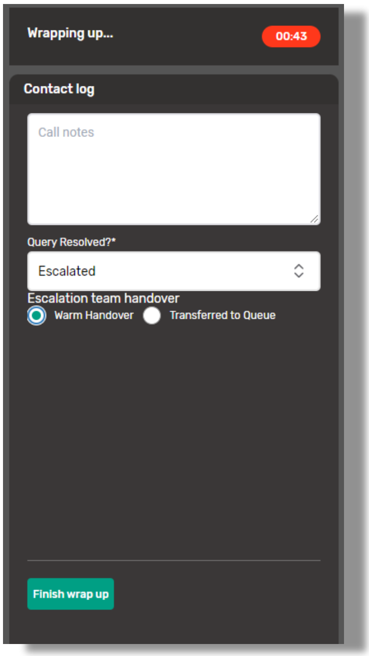
We will show some examples of different options and what an Agent would see if configured in that way.

Example Contact Log Settings

In this example the company wanted the Agents to also confirm how the transfer was handled, for example whether this was a “warm handover” where they introduce the customer to the escalation team, or if they just transferred them to the queue for the escalation team.

As this option might not occur every time, we didn’t make this a “required field”

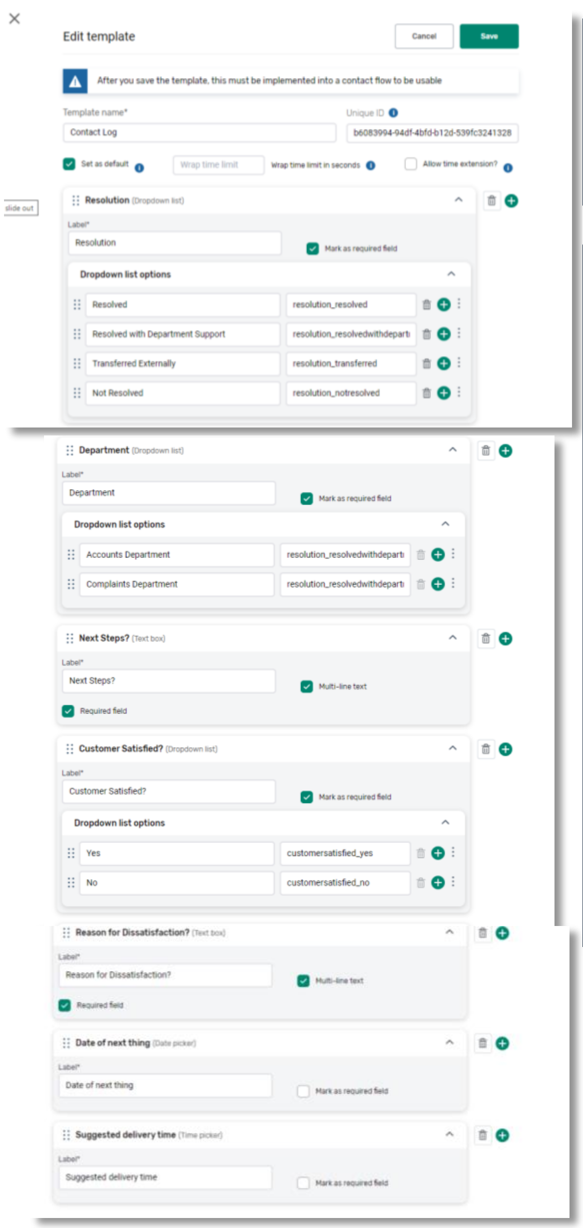


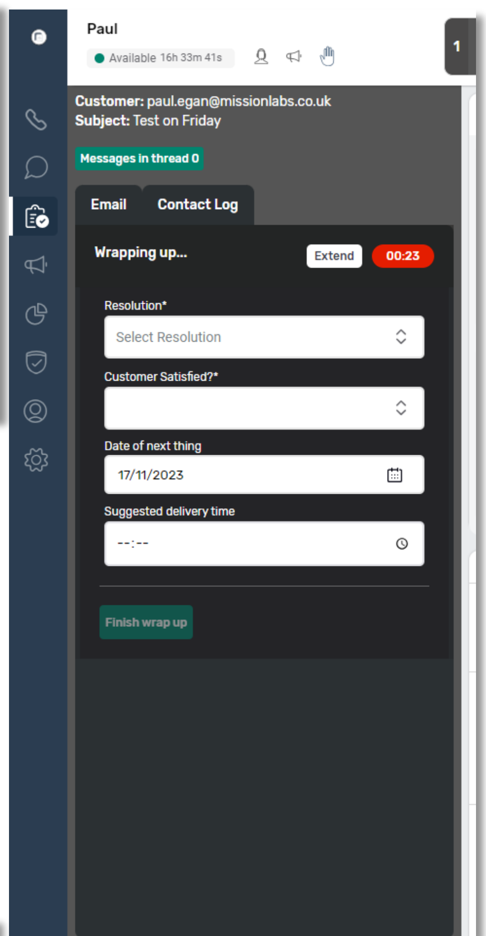


Example Contact Log Settings (Continued)

Let’s say a company want to create a dropdown list option with a calendar Picker and a Time picker to appear to appear.

An example of that is below, and how that might look to an Agent. However if the company setup an escalation process to a specialist team, they might want to be able to track this, so would want to maybe add more to the contact log screen.



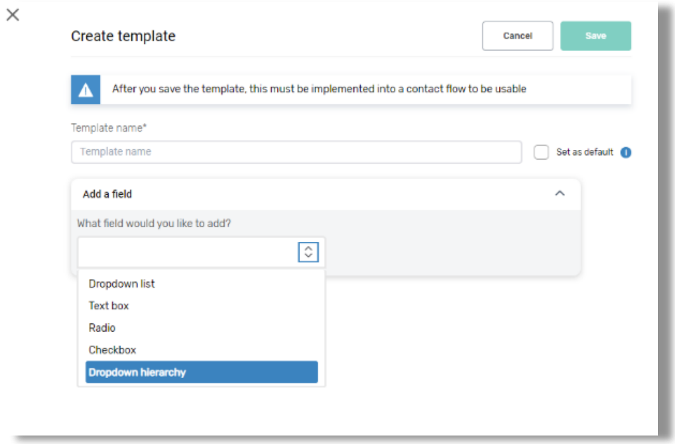


Example Contact Log Settings (Continued)

Let's say a company want to create a dropdown list option with a hierarchy of answers then they would use the Dropdown Hierarchy option.

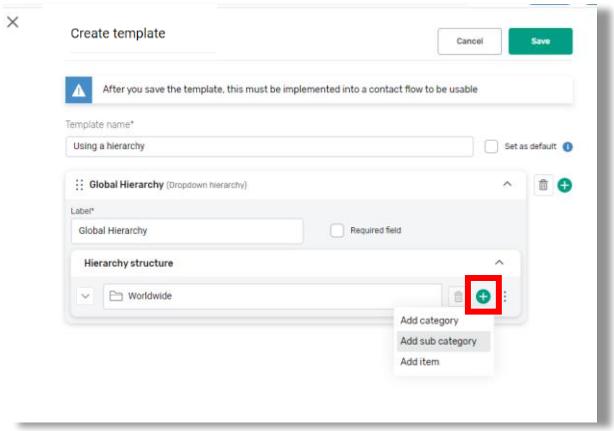
This allows you to create a complex hierarchy of information based upon a hierarchy you create with upto 8 different levels of hierarchy and an upto 100 listed at each level of the hierarchy.

In this example we will use geographical regions, to illustrate, but this could be based on whatever hierarchical structures suit your organisation. To start, we would need to select the Dropdown Hierarchy option from the dropdown menu.



We then need to give this template a name and input the Label for this section and input the first level of the Hierarchy within the appropriate fields.

To add more to the Hierarchy we then select the green plus symbol next to the hierarchy structure.



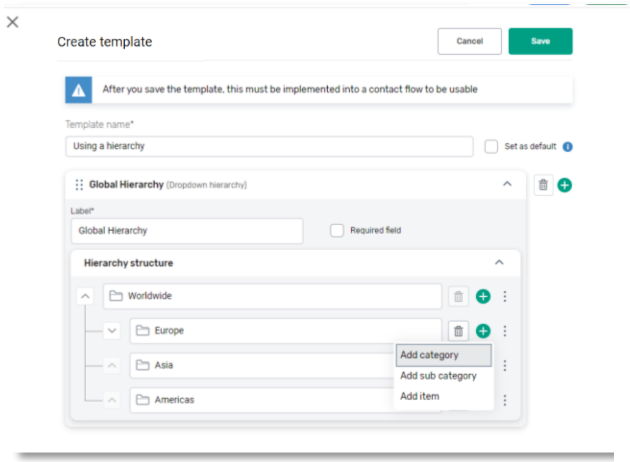
Example Contact Log Settings (Continued)

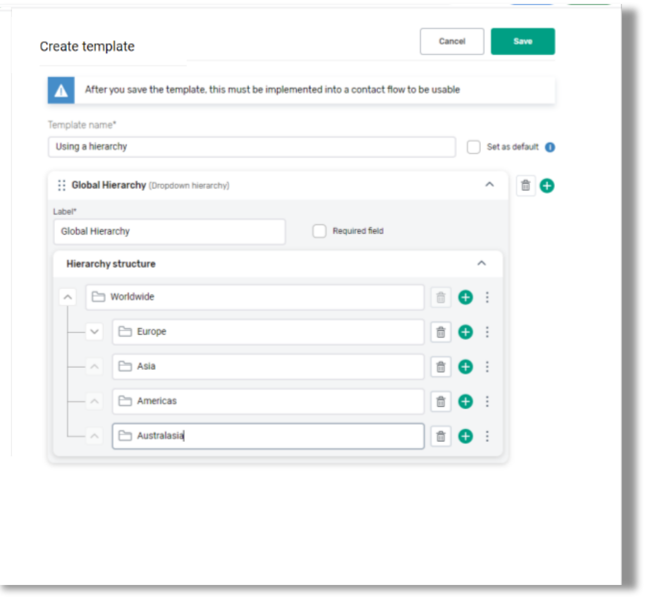
We will then be offered the option “Add category”. This will always add an additional structure at the same level as the one we have selected.

If we select the “Add sub category” this will create a sub category underneath the level we have selected.

If we select the “Add item” this will create an Item listing and data value field as a dropdown menu item Agents can select within that part of the hierarchy and that can be reported on.

So in our example we can create a number of sub categories under the “Worldwide” level of Europe, Asia and Americas. We could then select the Plus symbol next to Europe to add another category and create a category of Australasia. We can use the three buttons at the side to move the order in which the categories are listed.





We can then create whatever sub categrories we need for the organisation, and at each level we have the opportunity to create more categories at the same level, sub categrories underneath, or Items as actual dropdown options for agents to select and have data values that can be recorded.

Example Contact Log Settings (Continued)

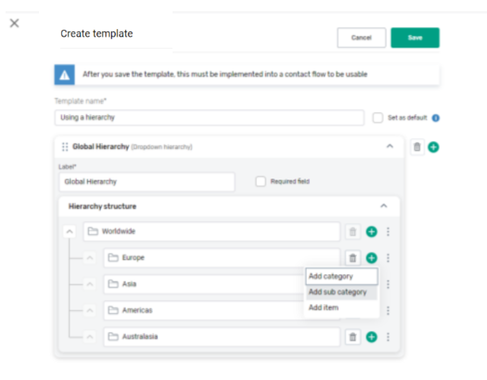
Each folder has it's own unique address, so you can repeat common terms, so long as they are not duplicated at the same level.

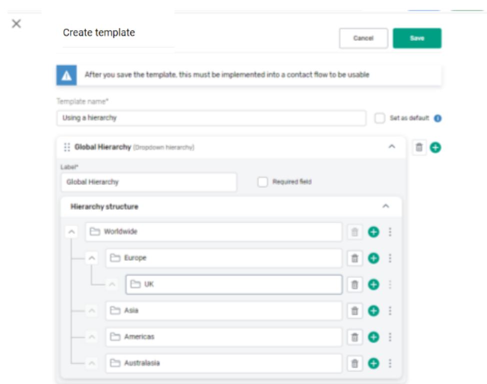
So in our example, each category location could have it's own sub category of "Delivery" as they would all have their own unique address e.g.
Worldwide\Europe\UK\Northwest\Manchester\Delivery.

However the system will not allow you to create duplications at the same level.

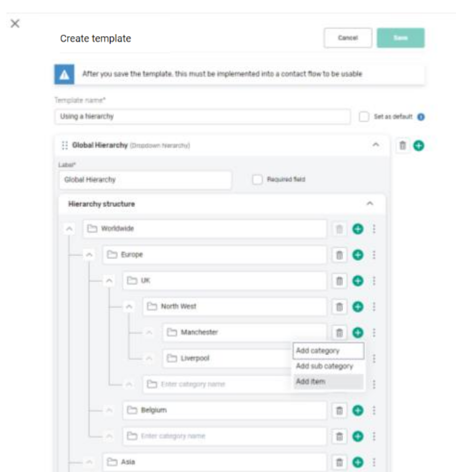
So for example if you tried to create two "Manchester" categories at the same level the system will not allow this.

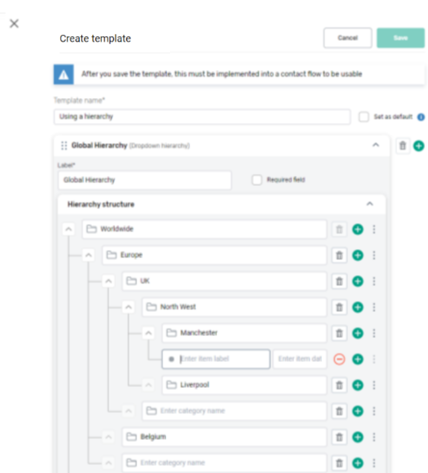
Creating the UK Within the "Europe" folder would be done like this…





We could then create sub categories of regions and towns until we want to create dropdown items for a specific town location eg Manchester.



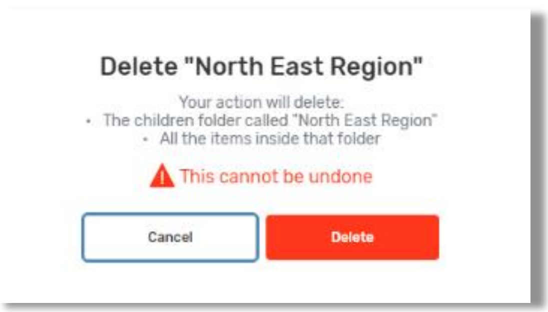


Example Contact Log Settings (Continued)

Deleting part of Hierarchy

If at any point you try and delete a category that has sub categories or items withing those sub categories you will be warned that all items and sub categories under this item will also be deleted.

So you should ensure that items have been recreated in new homes / moved appropriately before deleting items from the hierarchy.



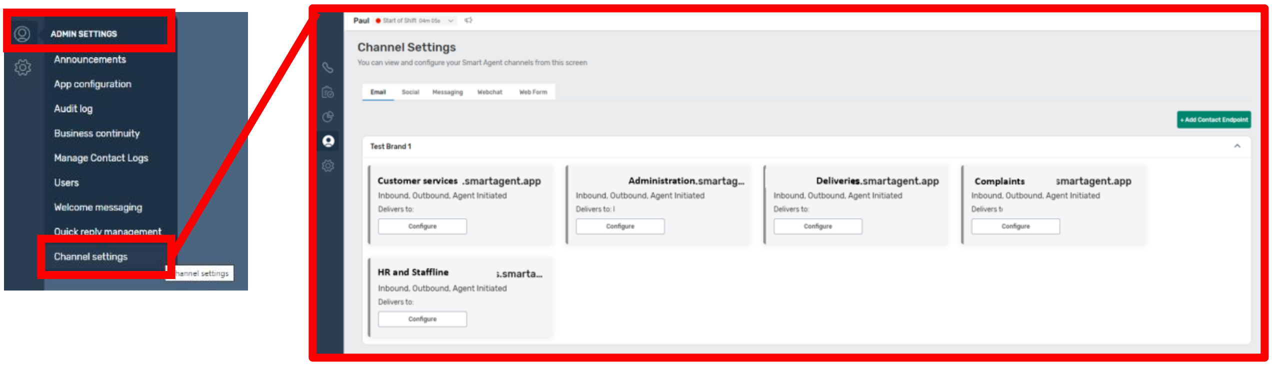
Linking a Contact Log template to a Contact flow in Amazon Connect
Once you have completed a contact log template in SmartAgent, if you want it to apply to a particular Contact flow you will need to make a note of the Contact log ID number and Name and then open Amazon connect and select that Contact flow you wish it to apply to.

This will usually take the form of adding a Set Contact Attribute block into the required flow and specifying the user attribute assigned to contact logs with the contact log ID as the value.

However you should contact SmartAgent team if you need assistance in applying these changes to your existing flows if you aren't sure of the best location to place this element.

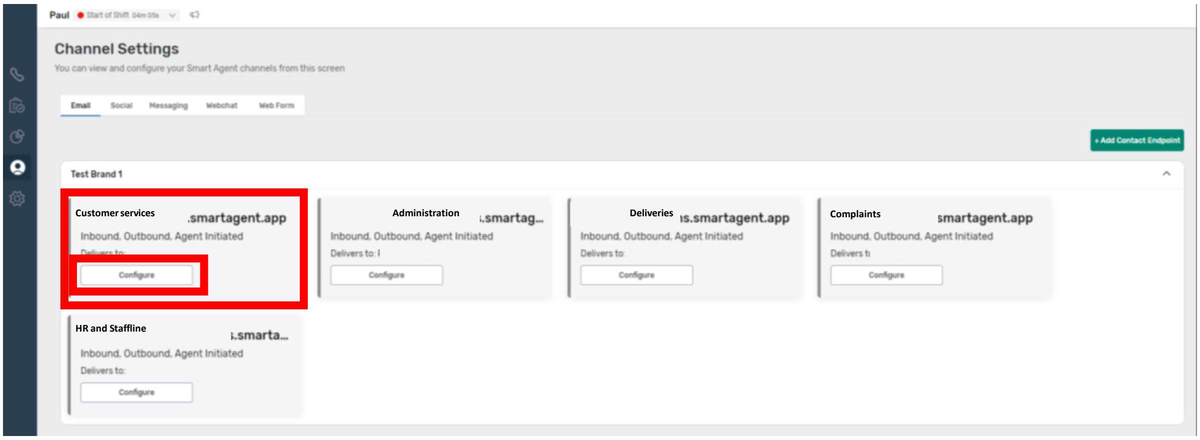
Channel Settings Configuration

Within the admin settings menu you can access the Channel settings configuration screen which shows current configurations options built into your particular channels.



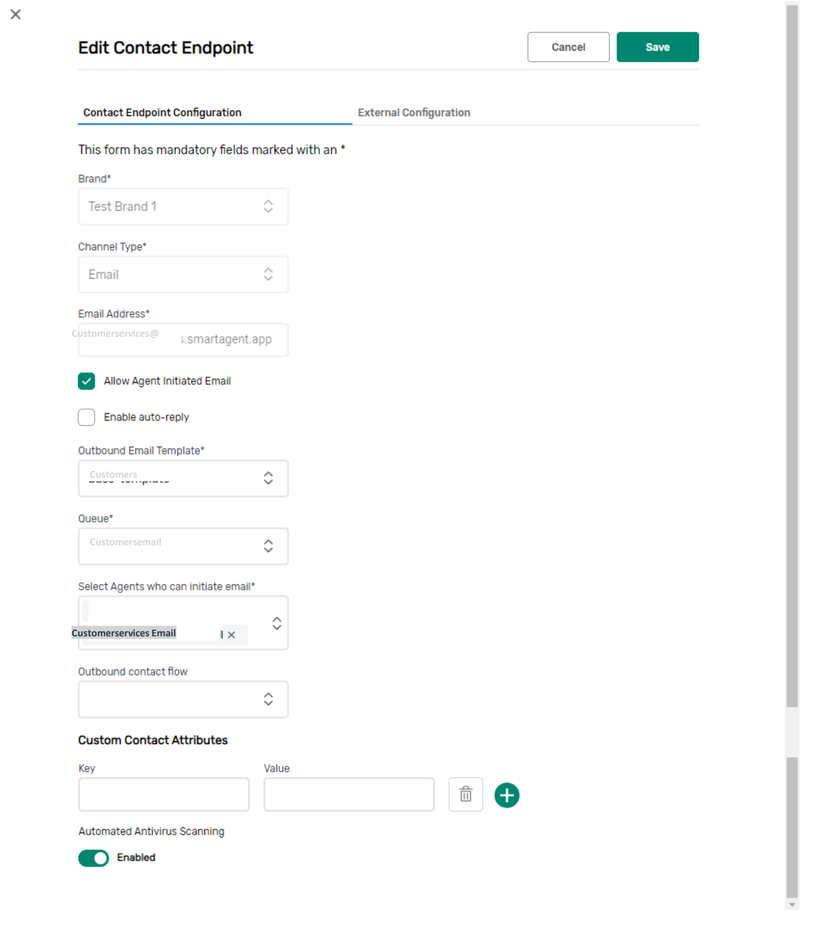
There will be a tab for each channel with configuration options and then particular "Contract Endpoints" that have been preconfigured. For example this might be a set of email mailboxes used in your email channel.

The settings of this particular contact endpoint can accessed using the "configure" button within the contact endpoint.



Channel Settings Configuration (continued)

In the “edit contact endpoint” screen you can change the pre-configured options to other options already setup within your instance.



For example you can change the particular Brand Identity and the email address details.

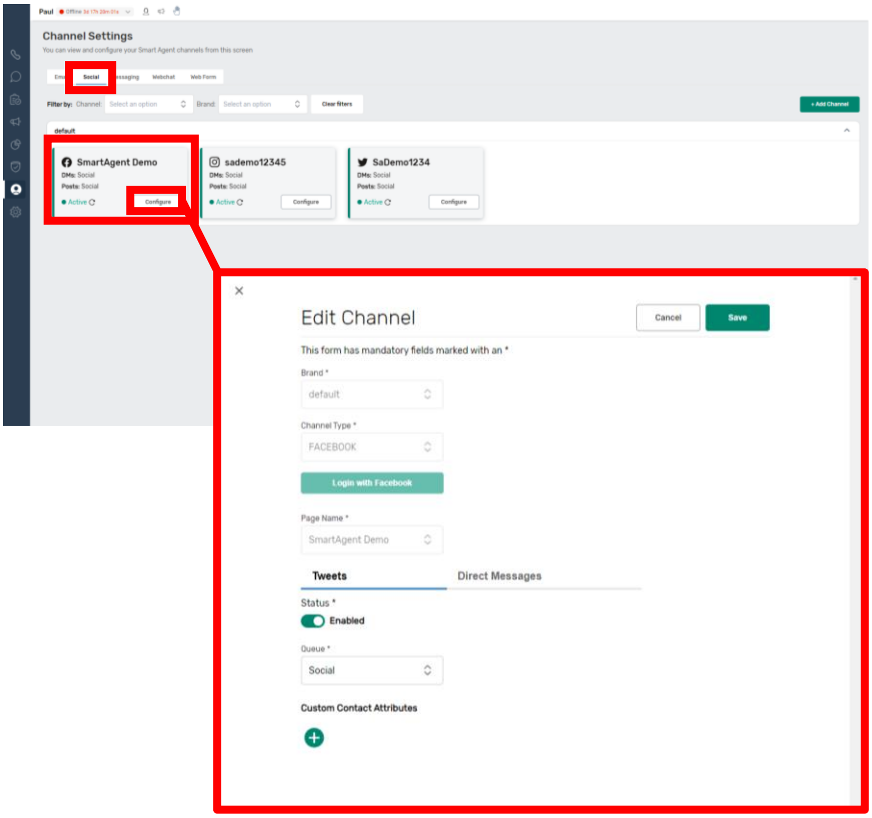
You can also change whether agents can initiate an email conversation, enable auto reply and specify which outbound email template is followed, what queue any replies will be routed to and be answered by which routing profile.

So you will be able to re-organise your channel from this screen if re-organising existing elements.

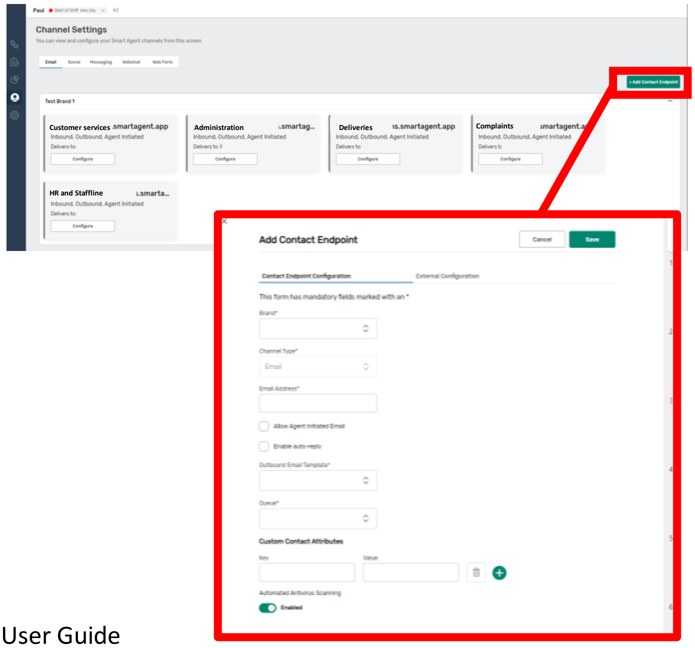
Different channels will have different configurable options and some will be highly specific to how a particular platform is setup.

Channel Settings Configuration (continued)

You may see very different options appearing, particularly in the Socials Tab where you may also have different configuration options for direct messaging as opposed to creating public announcements on the channel.



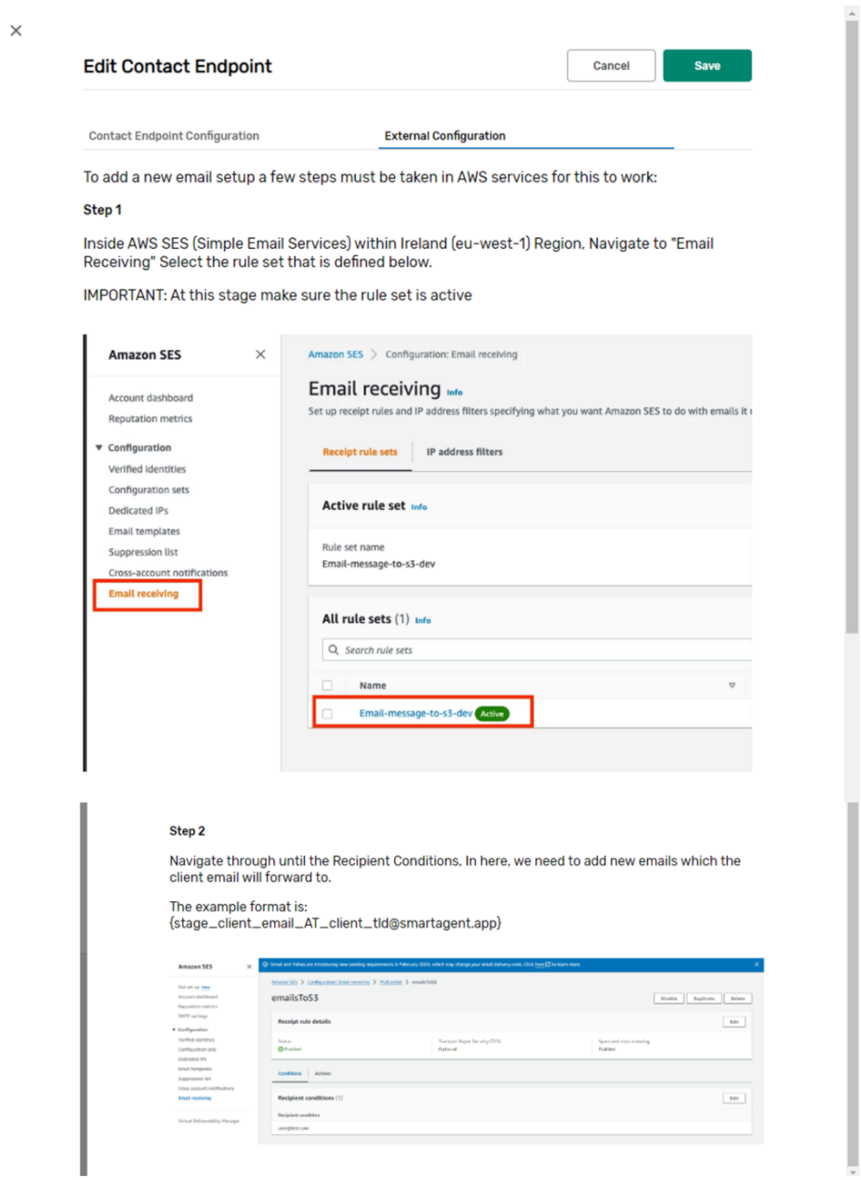
You can also add a completely new contact endpoint selecting the Add endpoint button and completing the necessary fields. These will have to already be part of your existing system.



Channel Settings Configuration (continued)

If they are new external configuration options or you wish to change existing external configuration options then you can select the “External Configuration” tab.

This will either be populated with your existing external configuration, or if you are adding a new external configuration this will be guidance on how to add a new email address to your connect instance for example, or the particular onboarding processes for that particular social onboarding channel.



Module 3: Making Structural changes

In this module we will provide some assistance to help you understand the basics in how your system is setup – There is a wealth of training material within Amazon Connect to further understanding. If you are planning on making major structural changes to your system, we would recommend contacting SmartAgent team for assistance.

By the end of this module, you will be able to:

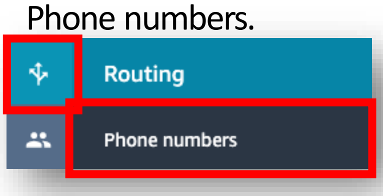
- Understand Phone Numbers in Amazon Connect
- Adding / Amending Queues
- Adding / Amending Routing Profiles
- Agent Hierarchy
- Security Profiles & Permissions
- Contact Flows

Phone Numbers in Connect

Each of the separate voice lines within your Amazon Connect instance has its own phone number.

These can be disabled as required but should not be released as once this has been done they cannot be recovered.

To view phone numbers in Amazon Connect, select Routing from the side menu then Phone numbers.



A list of phone numbers is displayed along with a description and the Contact Flow/IVR that each number is assigned to. The contact flow determines how the call is routed and is covered in a later section in this module.

You can request new numbers from this screen but these will initially be setup for low volume of calls so will need to contact Amazon to plan for expected call volumes.

Adding & Amending Queues

There are two types of queues in Amazon Connect:

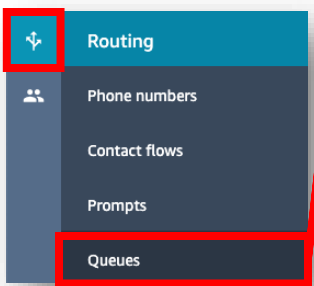
Standard queues

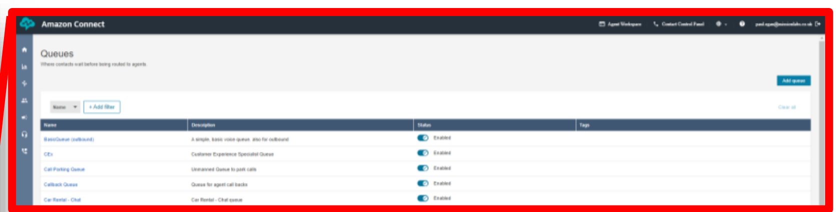
This is where contacts wait before they are routed to and accepted by agents.

Agent queues:

These queues are created automatically when you add an agent to your contact centre. Contacts are only ever routed to an agent's queue when you specifically do this in a contact flow.

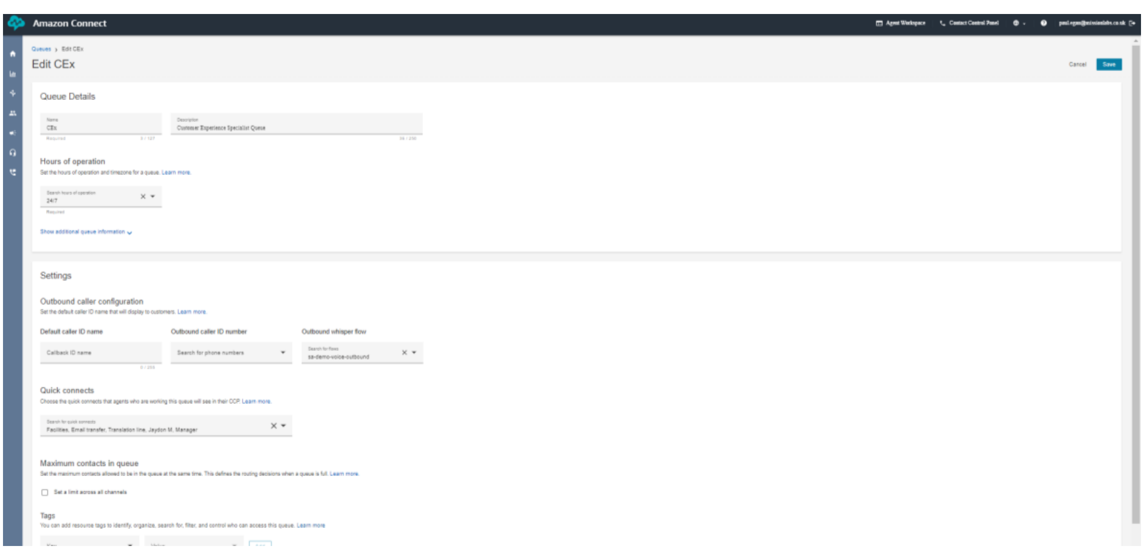
To view queues in Amazon Connect, select Routing from the side menu then Queues.





From here you can create a new queue, disable a queue and select a queue to edit. Please note that once you've created a queue it cannot be deleted - only disabled.

You can edit a Queue by selecting a queue from the list to edit. From here you can change the details of the Queue:



Adding & Amending Queues (Continued)

All of the details on this screen can be changed, but you should be aware that some of your flows may have this information specified in them and so you should exercise caution if amending any "live" queues

Name - This is what is displayed in any reports in SmartAgent and Amazon Connect.

Description - only visible to administrators.

Hours of operation - despite a check being carried out in contact flows, you must also set this against a queue.

Outbound caller ID name - not supported in the UK.

Outbound caller ID number - you must select a number here listed in Amazon Connect. You can override this though in a contact flow.

Outbound whisper flow - this is a flow which is used to set call recording and analytics options, override the caller ID and also play a message to the customer when the call is connected.

Quick Connects – Address book entries for transfer and external calls. Setting this at queue level enables you to have different quick connects for different sets of agents.

Queue limit - any contacts over this limit will automatically be disconnected

Tags Add resource tags specific to this queue.

IF you have made any amendments you will need to click Save when you've finished editing.

Adding or Amending Routing Profiles

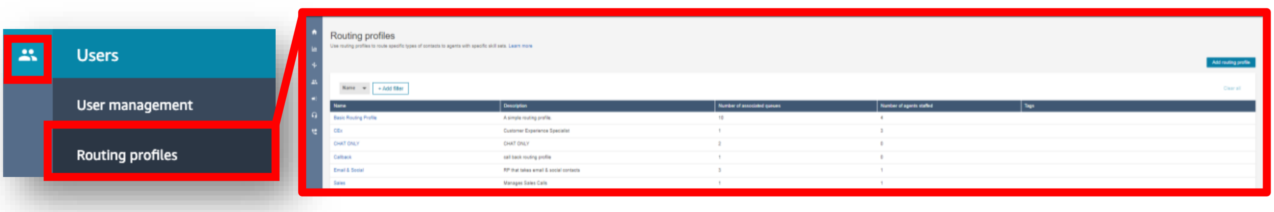
While queues are a 'waiting area' for contacts, a routing profile links queues to agents.

When you create a routing profile, you specify which queues will be in it. You can also specify whether one queue should be prioritised over another.

Each agent is assigned to **a single routing profile**.

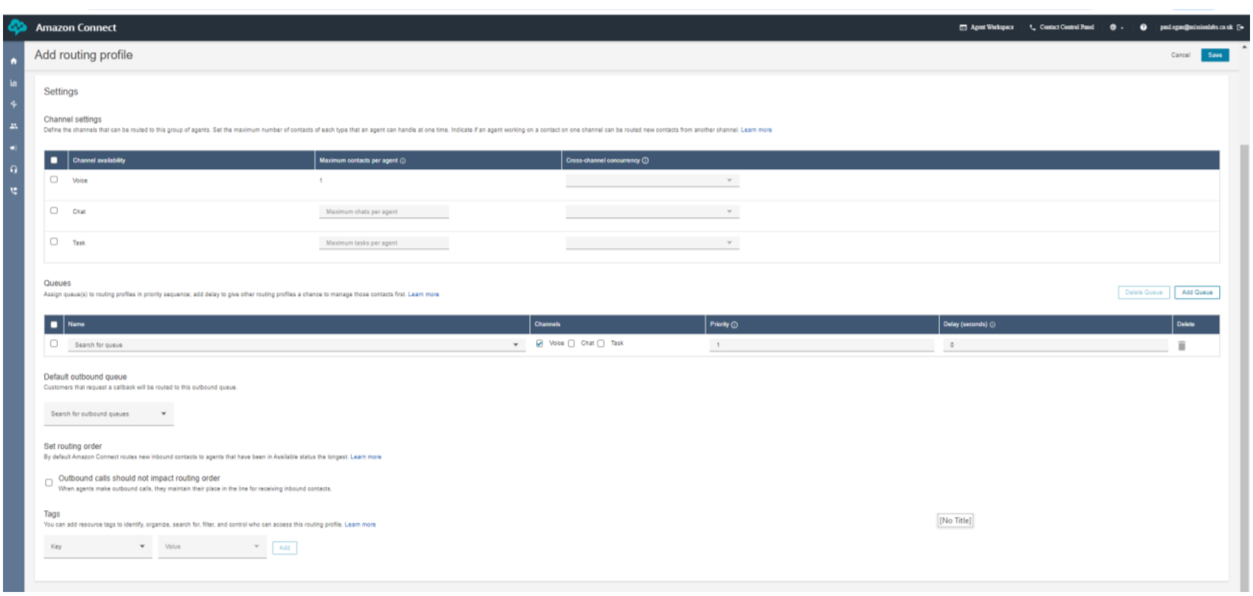
A routing profile can have multiple agents assigned to it.

To view routing profiles, select Users from the side menu then Routing profiles.



A list of routing profiles is displayed along with a count of queues and agents assigned to each one. Please note that once created, routing profiles cannot be deleted.

To create a new profile, click the Add new profile button.



Adding or Amending Routing Profiles (Continued)

Enter a name and description for the profile. The name will be visible to supervisors when assigning the profile to agents.

Select the channels the profiles will support and set the maximum number of chats per Agent ,if applicable.

Next assign some queues to the routing profile. A blank row will already be visible. Once you've added the first queue, click the Add queue button to add more.

Select a channel for each queue

Then select a priority and delay based on your requirements.

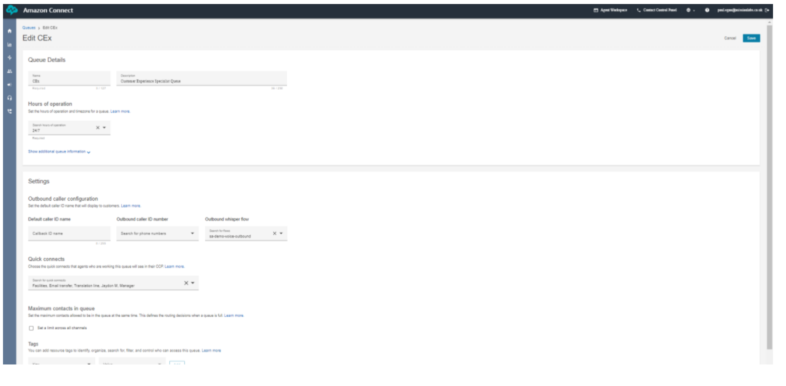
Make sure that you select a queue for any outbound calls made by the agents on this routing profile. Select Outbound from the list.

Finally, click on Add new profile and your routing profile will immediate be available to assign to users.

Editing routing profiles

Select the routing profile from the list and edits as required - e.g add in a newly created queues. If you need to remove queues, simply check the box next to the queue and click the Remove button.

If a profile is no longer required, you can remove all queues and click Save.
Understanding queue priority and delay
Priority and delay are powerful features that allow you to load balance contacts among groups of agents.



Adding or Amending Routing Profiles (Continued)

Understanding queue priority and delay
Priority and delay are powerful features that allow you to load balance contacts among groups of agents.

Example 1: Different priority but same delay
For example, one group of agents is assigned to a Sales routing profile.
Since their primary job handling Sales contacts, the Sales Line queue is Priority 1 and Delay is 0. As they can also help with Service contacts, the Service queues can be set with a priority of 2 and a delay of 0.

Queue	*Priority*	*Delay (in seconds)*
Sales Line	1	0
Service Complaints Queue	2	0
Service Transfer Queue	2	0
Service Other	2	0

If there are no contacts in the Sales Line queue, then the agents will be presented with contacts from the Service queues with the same priority as each other.

Example 2: Same priority but different delay
Say you set the Service queues to Priority 1 and Delay of 30 seconds, as shown in the following table:

Queue	*Priority*	*Delay (in seconds)*
Sales Line	1	0
Service Complaints Queue	1	30
Service Transfer Queue	1	30
Service Other	1	30

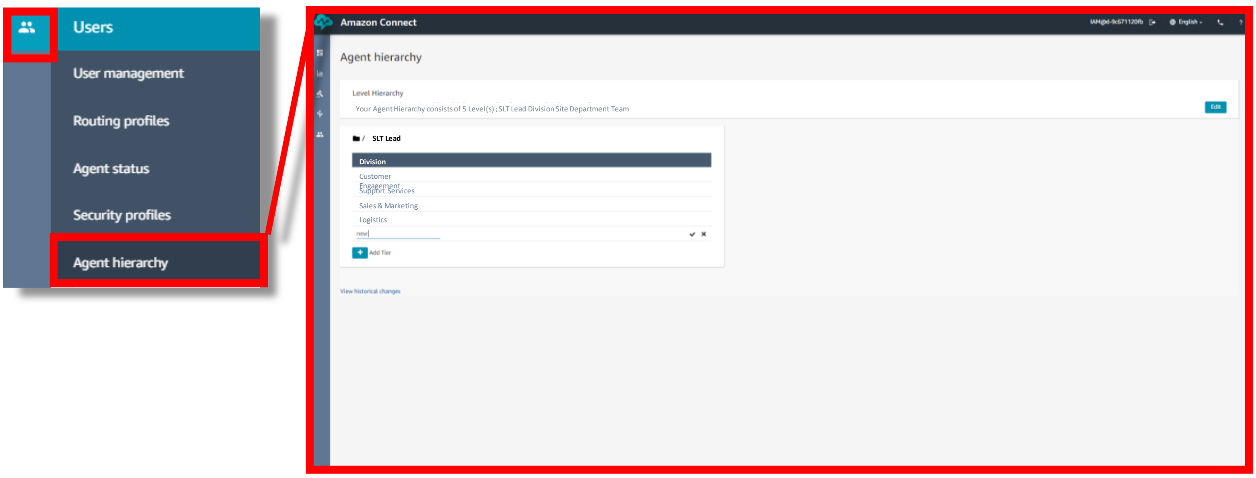
These agents will always get contacts from the Sales Line queue first because the delay is 0. However, when a contact in the Service queues ages past 30 seconds, it will also be treated as priority 1. The agents will then be presented with the contact from the service queues.

If all Queues have equal Priority & Delay the oldest contact is routed first. It goes to the agent who has been idle for the longest time.

Amending Agent Hierarchy

Agent Hierarchy is designed to help you report on performance for particular teams and can also be used to restrict access to CTR records to those within a particular part of an organisation. You can create different levels of Agent Hierarchy and name that to whatever is appropriate for your organisation.

It's easy to add new departments or teams within this Agent Hierarchy structure accessed through the dashboard or from the User Management menu.



Typically you will want to rename teams, add new teams or new departments within your existing structures and this is really easy to do.

In this example the organisation has 5 levels, SLT Lead, Division, Site, Department and Team. At Division Level they currently have 4 specified, Customer Engagement, Support Services, Sales & Marketing and Logistics.

If they want to setup a new Division, they need to move to the correct level of the hierarchy and then click the "Add Tier" button and then create a name for the new Division.

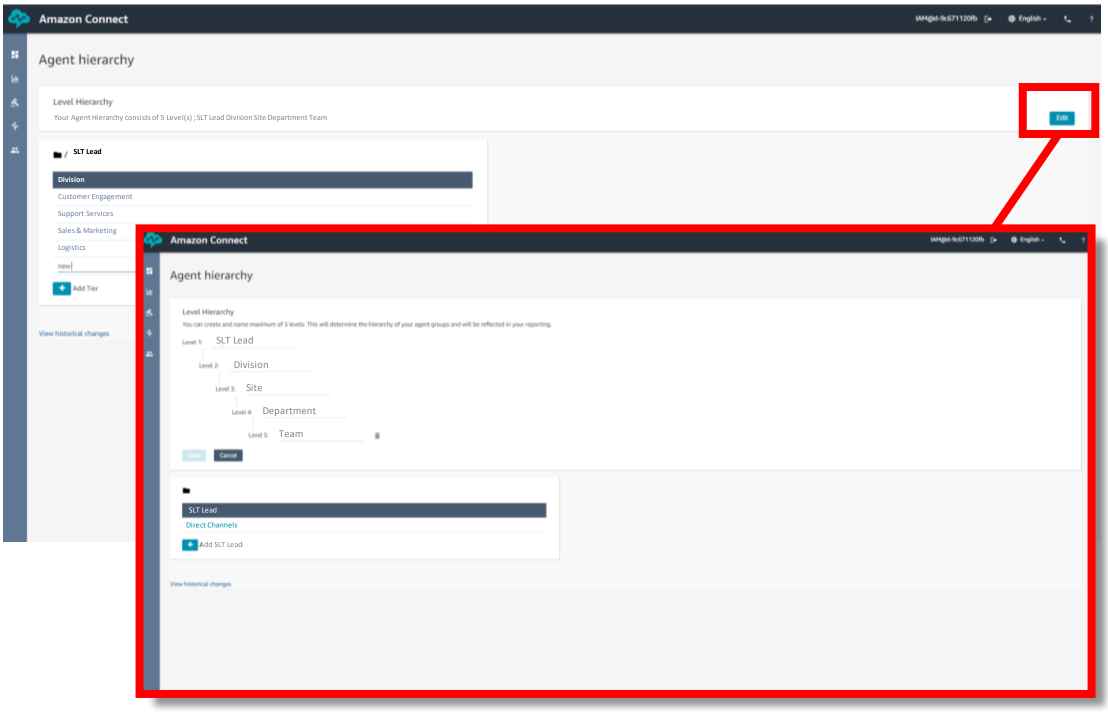
If they recruited a new team leader and wanted to add a new "team" within the direct sales department at their Manchester site, they would need to click down the Hierarchy – SLT Lead > (Sales Director) >Division (Sales & Marketing) > Site (Manchester) > Department (Direct Sales) > and then click the "add tier" button to add the new team leaders name to the list of team leaders already within that level.

Amending Agent Hierarchy (Continued)
Once this is done, any agents that the new Team leader is responsible for can have their agent hierarchy amended so their stats and call records can be viewed by the new team leader.

If however the new team leader was taking over an existing team from a leader that has left, you may prefer to follow the process outlined in the next section to edit an existing Agent Hierarchy item.

Amending Agent Hierarchy - Renaming or Re-structuring the Hierarchy
You may need to just change the name of a Department or Team Leader without changing any of the reporting that surrounds it or If you only currently use 2 of the 5 levels of Hierarchy available and need to add a level,or are looking at more of a major restructure then you may need to rename or add whole new tiers to your structure.

In order to do this you need to access the Agent Hierarchy screen and click on the "Edit" button in the top right hand corner to access the Agent Hierarchy edit screen.



In the upper part of the screen you can rename the Agent Hierarchy labels or add a new Level altogether if needed. You can also delete a level if it is no longer required, but you can't delete a level until you have deleted or de-activated any levels that sit below that level.

Amending Agent Hierarchy (Continued)

Amending Agent Hierarchy - Renaming or Re-structuring the Hierarchy (continued)

In the lower part of the screen you can select the submenu item and click the pen icon to amend the details or the bin icon to delete / deactivate it.

So, if you wanted "Direct Channels" to be renamed as "Direct Services" you could do that without disrupting the setup or historic data. You would just need to make people aware of the change and that the "new" name might also appear in any historic reports generated after that date.

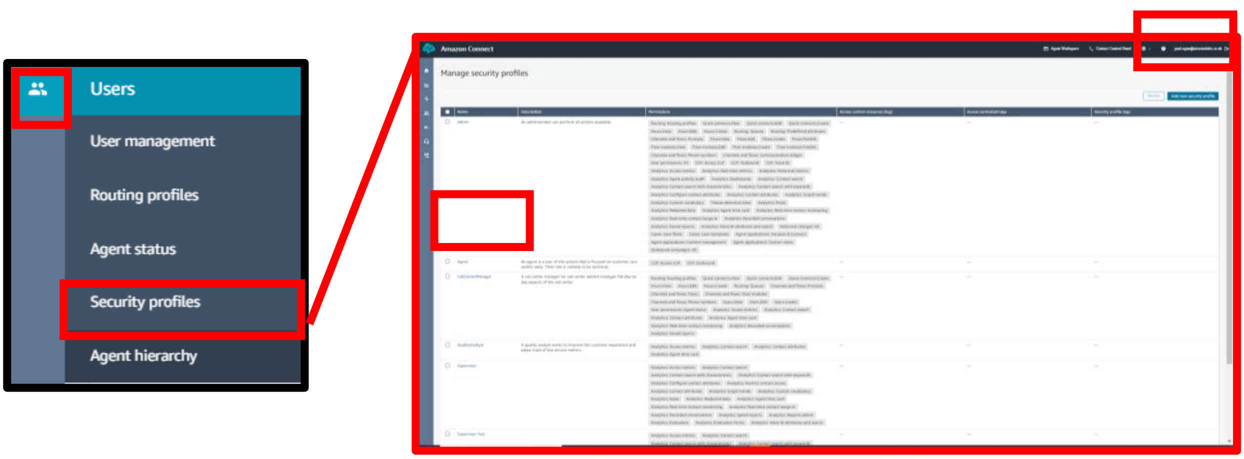
You can view any of the historic changes from this screen also to help track any changes in reporting names.

Amending Security Profiles & Permissions

Security Profiles determine the level of access a user has on the system. Typically your setup will be built with a defined list of access levels. Usually an Agent Profile, A Supervisor Profile and an Admin profile.

However, some organization may require additional access for a higher tier of Supervisor /Call Centre Manager or a role for QA specialists or Reporting specialists.

These roles can be created and amended in the Security Profile Section of Amazon connect or in the Permissions area of SmartAgent for features that are configured by the SmartAgent Application.



The Security profiles can be found in the Users section. This screen gives a summary of the access given to each role. You can create a new security profile using the “Add new Security Profile” but that will involve building the access level from scratch.

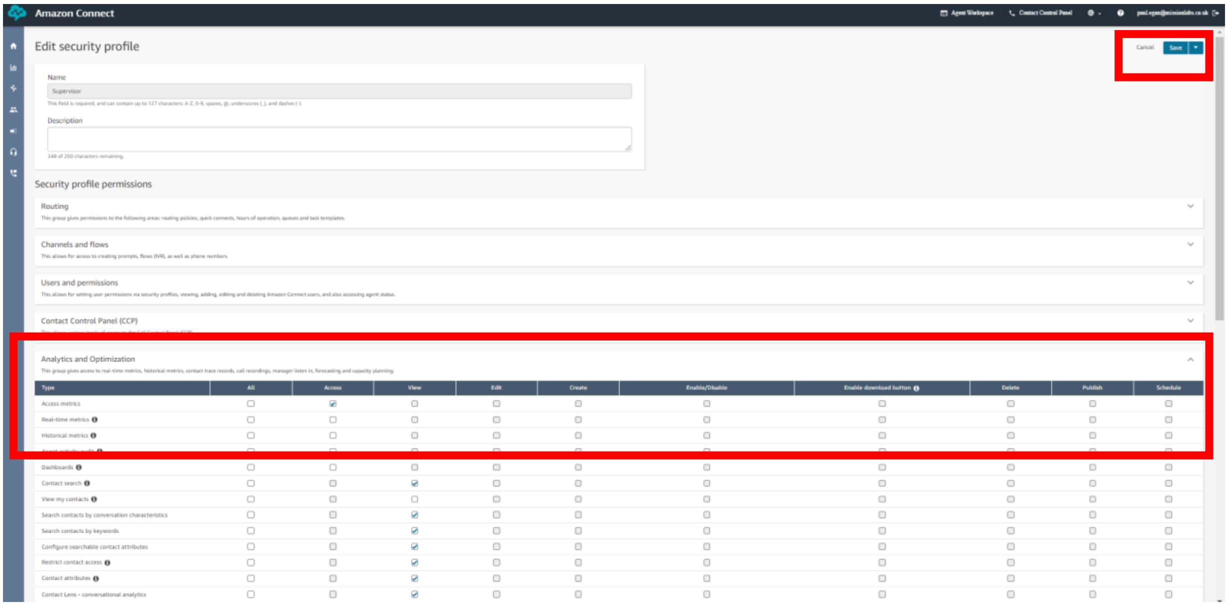
So you may find is more useful to find a similar role and select it using the name and use the “Save as” function to create a copy of the role and amend as necessary.

You should also bear in mind that any changes made to live Security profiles will affect multiple users who have that role, so creating a copy and giving it to a user to test the access may be preferable.

If you do wish to edit a security profile select it from the list and you will then be able to see a detailed breakdown of the access level and can make very distinct levels of access to suit your organization.

Amending Security Profiles & Permissions (Continued)

For example you may wish to create a version of your Supervisor role but that has the ability to access the Historic metrics reports in Amazon Connect.



In each Security profile are a number of tabs. If you expand that tab you then have a very detailed breakdown of the access within that are and can change the access as required.

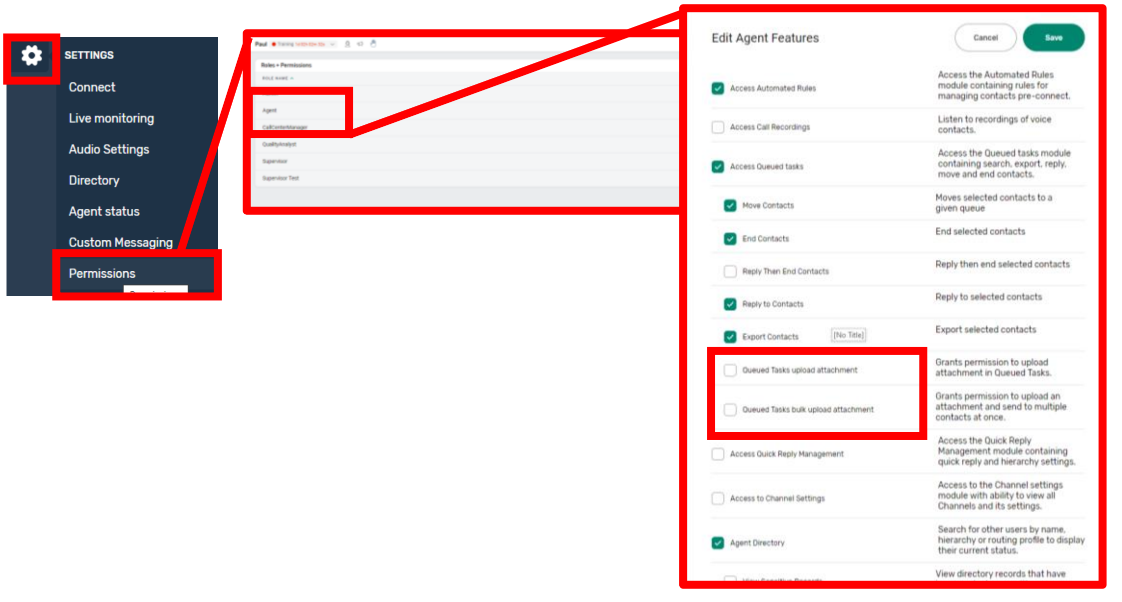
For example you could give access to Historic metrics as view only, or give the ability to create,share or delete reports as required using the column headings and ticking or unticking the boxes.

If you make changes to a live Security profile theee changes may take a few moments to cascade through your system and it may be advisable to get the user group to log back in if the changes are extensive.

Changing Permissions within SmartAgent Applications.
SmartAgent will pickup and apply any changes in the Amazon Connect Security Profiles and apply these within the SmartAgent Application. However there may be features that are solely created through configuration options and these may require an admin to go into SmartAgent and make changes within the Permissions for the security Profiles.

Amending Security Profiles & Permissions (Continued)

Changing Permissions within SmartAgent Applications (continued).
In order to change permissions with SmartAgent got to Settings menu and select Permissions. Select the Security profile you want to make the amendment to from the list.



Then from the detailed permission listing select the options you want to apply to that role. In this example we are going to select if Agents can upload attachments and if they can bulk upload attachments.

If new a new feature is developed for SmartAgent and is released, you may need to change permission settings within the roles for those users to see that new feature.

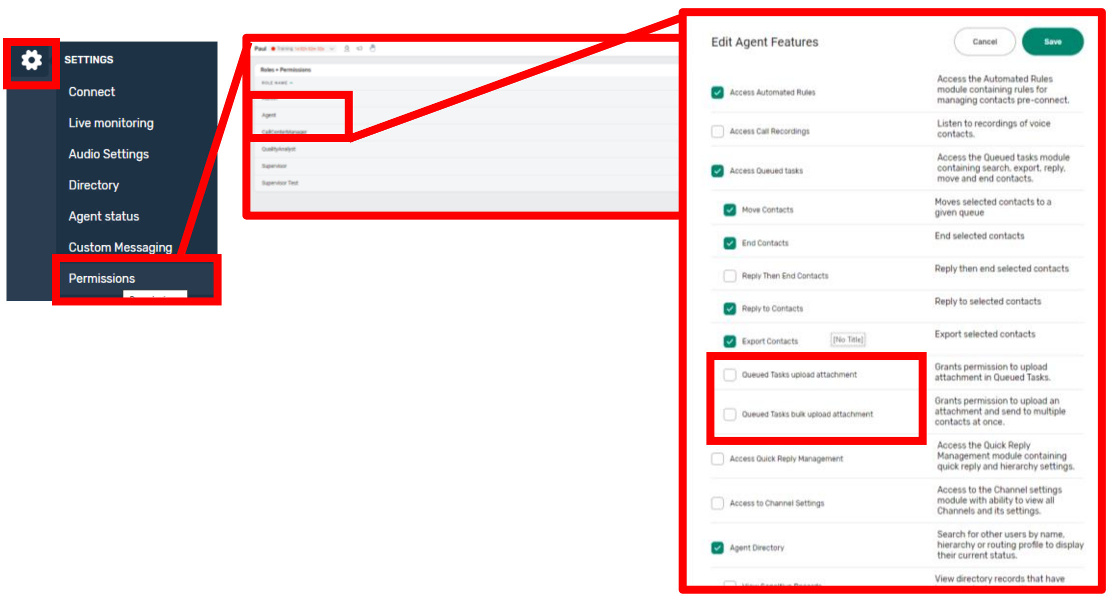
Switching on new Standard Features in Permissions

Periodically we may introduce a new Standard feature for SmartAgent that can be added to your users.

These features will not require any particular configuration that is unique to your organization. A recent examples is the ability to create and amend contact logs. This feature would be automatically added to the Admin role as it is primarily for use by admins.

However other features such as Agent Assistance (hands-Up) or Allowing supervisors to barge onto calls will need to be manually added to role permissions within SmartAgent.

In order to change permissions with SmartAgent got to Settings menu and select Permissions. Select the Security profile you want to make the amendment to from the list.



If new a new feature is developed for SmartAgent and is released, you will see a new permission in the list for that feature. If you want to give access to that feature, then tick the box and save the permission setting.

Amending Contact flows

A contact flow defines the customer experience with your contact centre from start to finish. Amazon Connect supports multiple contact flow types across multiple different channels – some common types are detailed below.

Common Contact flow types

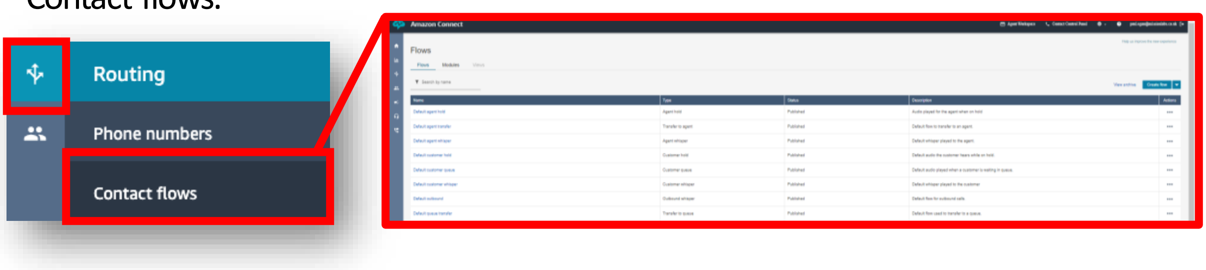
Type	*When to use*
Inbound contact flow	Flow that is attached to a phone number so is reached first on an inbound call from a customer. This enables you to control the customer flow using voice prompts and allowing customers to indicate why they are calling.
Customer queue flow	Manages what the customer experiences while in queue, before being joined to an agent. Used for music, comfort messaging, requesting callbacks.
Customer hold flow	Manages what the customer experiences whilst on hold. With this flow, one or more audio prompts can be played to a customer.
Customer whisper flow	Is activated immediately before an inbound customer is joined to an agent.
Outbound whisper flow	On an outbound call, the customer is placed through this flow immediately before being connected to the agent who placed the call.
Agent hold flow	Manages the agent experience immediately before being connected to a customer.
Transfer to agent flow	Manages what the agent experiences immediately before being transferred to an agent via a quick connect.
Transfer to queue flow	Manages what the agent experiences immediately before being transferred to a queue via a quick connect.

Amending Contact flows (Continued)

Contact block definitions
You create contact flows in the contact flow designer using contact blocks. Drag and drop contact blocks onto a canvas to arrange a contact flow and control the logic.

Please refer to Amazon Connects own definitions documentation for a complete list of supported functionality as this is very dynamic and new features are added all the time.

To view contact flows in Amazon Connect, select Routing from the side menu then Contact flows.



A list of contacts flows is displayed along with a brief description and its type. All the live contact flows are prefixed as per our naming conventions. A selection of sample flows is listed along with some flows used for training.

From here you can create a new contact flow or select a contact flow to edit. Please note that once you've created a contact flow it cannot be deleted. So you may want to use a naming convention to highlight any flows that you want to archive or not use in the future.

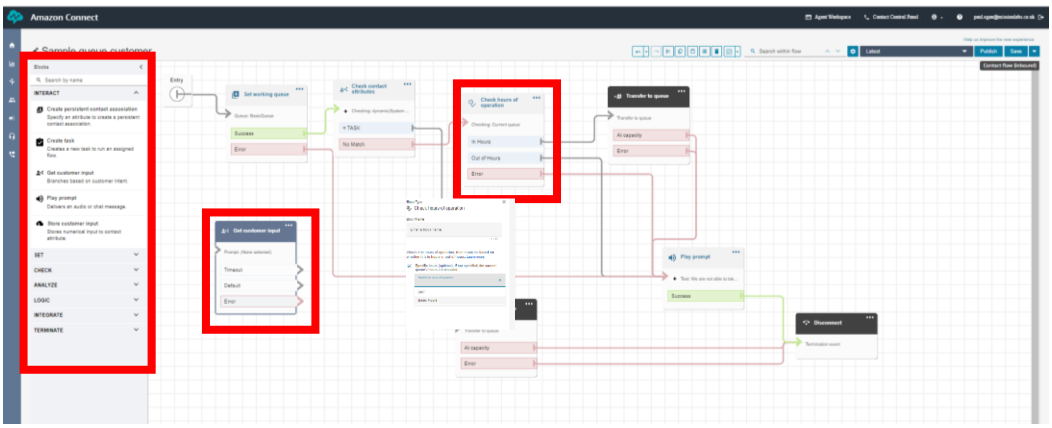
Our approach is to create a number of modular flows so that it is easy for you to maintain your system, making changes easy for you to manage.

Amending Contact flows (Continued)

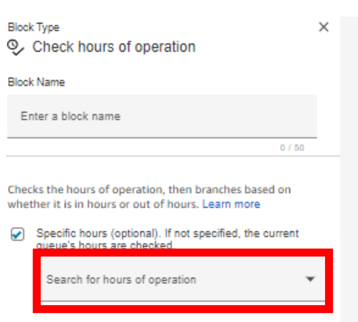
Editing contact flows

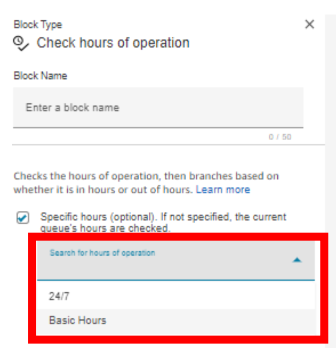
If you want to edit a contact flow hover over the list and select the flow you wish to edit.

The flow will be made up of various blocks that are connected to highlight the required flow. You can edit the values in these blocks by clicking into them, or add additional bocks by selecting them from the list on the left of the screen.



Lets imagine you wanted to change the Hours of operation for this flow. You would click into the Heading of the “Check hours of Operation” block.





You would then select the required hours of operation from the dropdown list and then save and publish the flow.

Changes like this can be made in your flows to amend hold music, change text to speech messages etc.

You can choose the “save as” option if you want to copy another flow and make adjustments if required also.

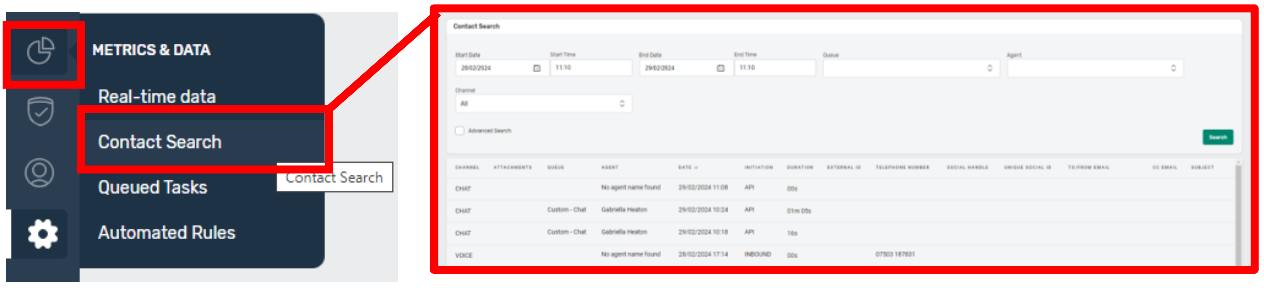
Module 4: Historic data

By the end of this module, you will be able to:

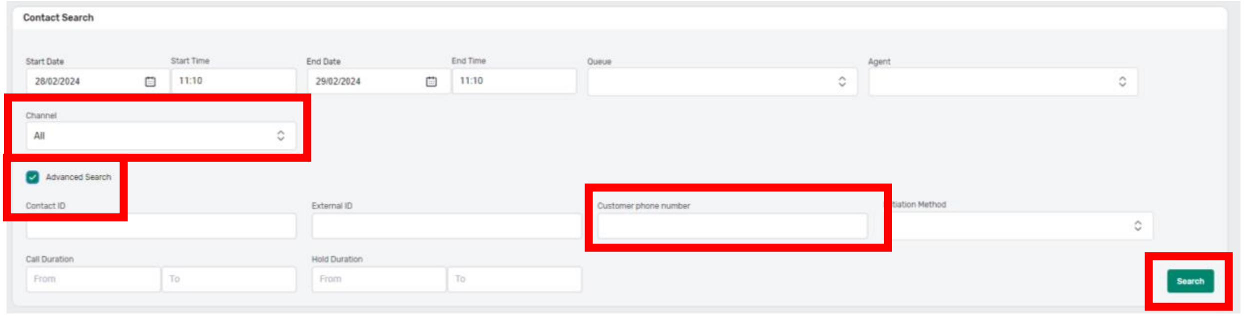
- Access Call recordings and CTR data in SmartAgent
- Access Historic reports in Connect- Queues
- Access Historic reports in Connect- Agents

Access Call Recordings and CTR in SmartAgent

Call recordings and Contact records (CTR's) are available within SmartAgent and can be accessed in Contact Search from the Metrics and Data menu.



The screen will automatically load all contacts within the last 24 hours across all channels, but you can do a refined search using the various data fields in standard search or advanced search options.



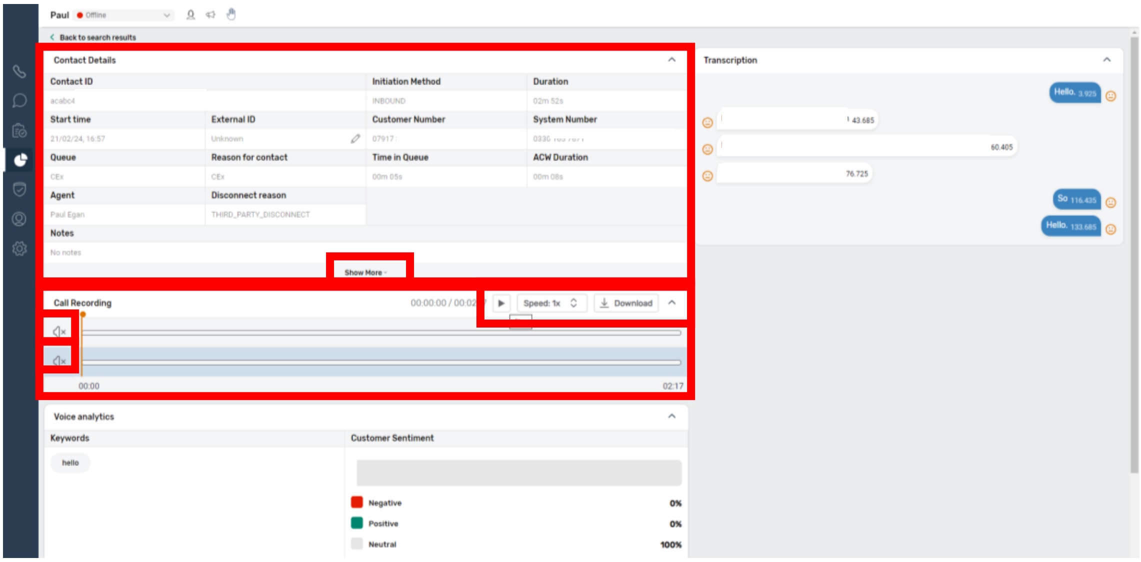
If you select certain channels this will also provide additional search parameters , for example if you select Email channel you can search by Email address as to / from or as CC'd email address.

Once you have the record you want to check click it in the list to bring up the details of the contact.

Access Call Recordings and CTR in SmartAgent (continued)

There will be a CTR record kept of every contact type, Voice call, chat interaction or email, so the information displayed will depend on the contact type and what features have been enabled for your organization.

The Contact Details field contains all the key metric information of the contact and additional meta-data, such as user defined fields, the options chosen by the customer and any after contact work notes input by the Agent. The full data can be accessed by selecting the "show more" option.

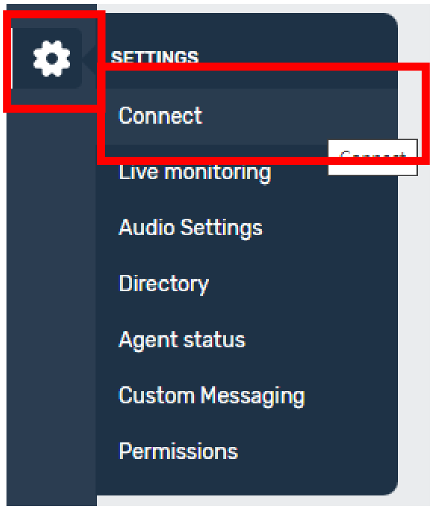


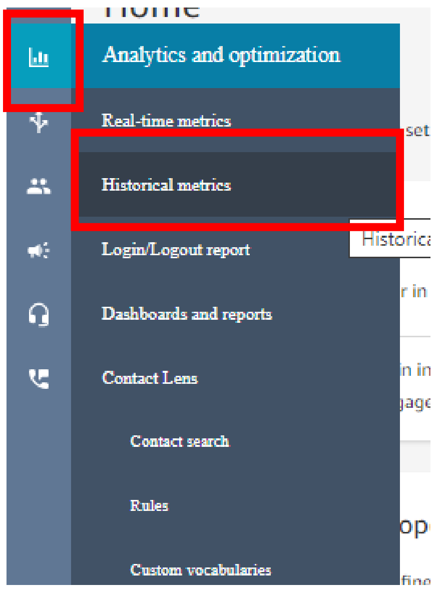
If the contact is a voice recording and call recording is switched on then a call recording field will appear. In the area you can mute one side of the conversation if needed, can play the recording back at different speeds, scroll to a particular point in the recording or download a copy.

If additional features have been enabled you may have a transcription of the contact or Sentiment analysis done by the "Contact Lens" feature, or be given the option to evaluate the call using the QA feature if that module has been configured.

Access Historic metrics in Connect – Queues

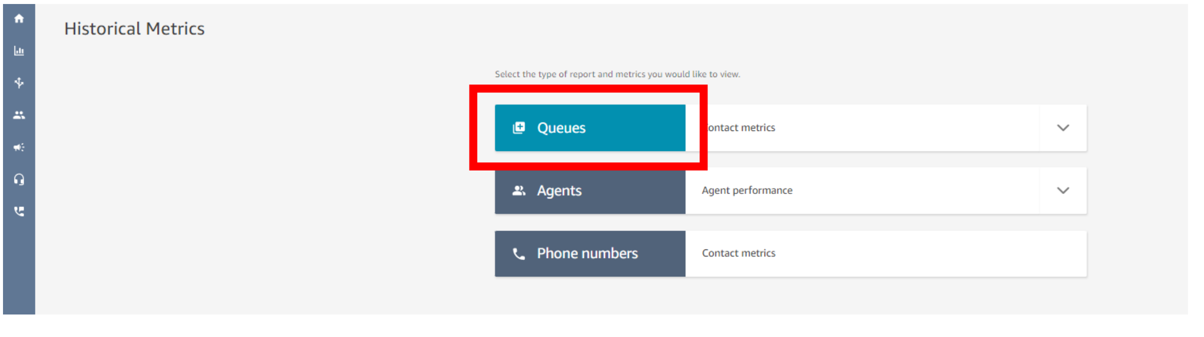
Historic metrics are available within the Amazon Connect application. As a supervisor you may be given access to this part of the application. Access may be restricted to just view reports, or you may also have the ability to create and share reports.





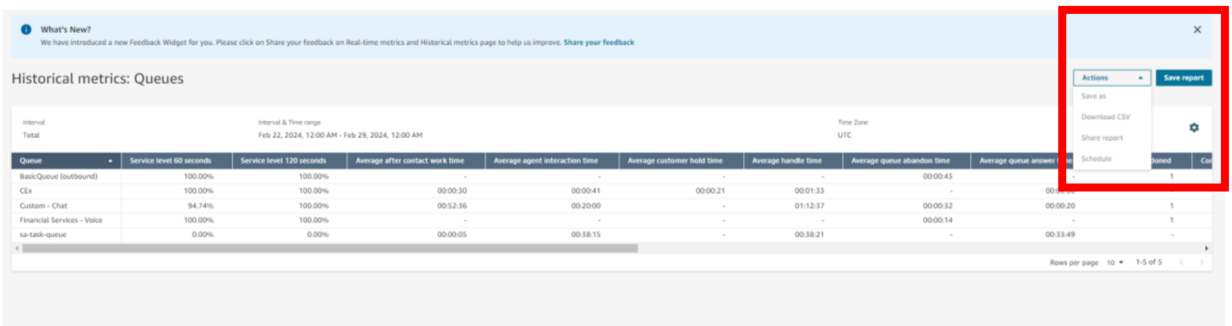
Connect can be accessed from the Settings menu – this will then open an additional tab in Amazon Connect. Historic and Realtime metrics, as well as other reporting features can be accessed from the "Chart" menu option.

You will then be presented with some options for what type of report you want to view or create. Each option will present a "standard" report which you can then reconfigure and save or share as appropriate. Reports can be scheduled to happen at regular intervals and be formed into dashboards in the Connect reporting section.



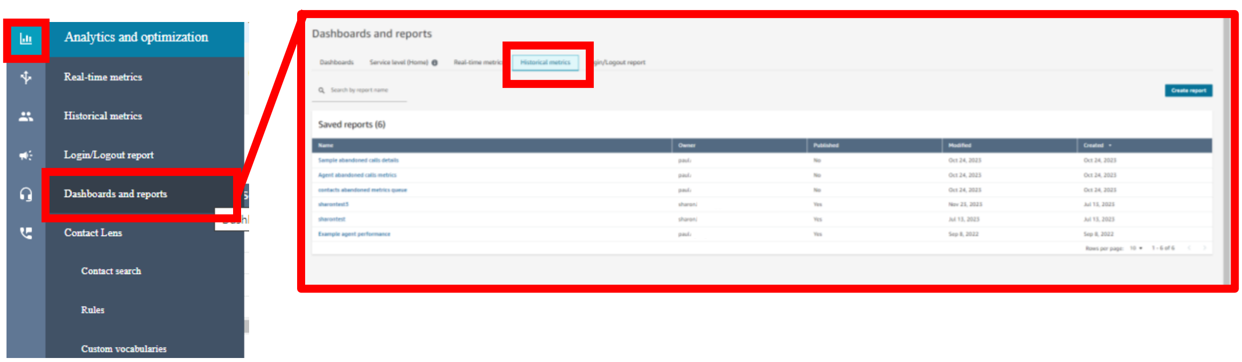
Access Historic metrics in Connect – Queues (Continued)

When you open a report it will have a standard set of columns – if you select the cog on the right hand side you can select additional metric columns, use varous groupings and filters to breakdown the data and amend the interval and time ranges as required.

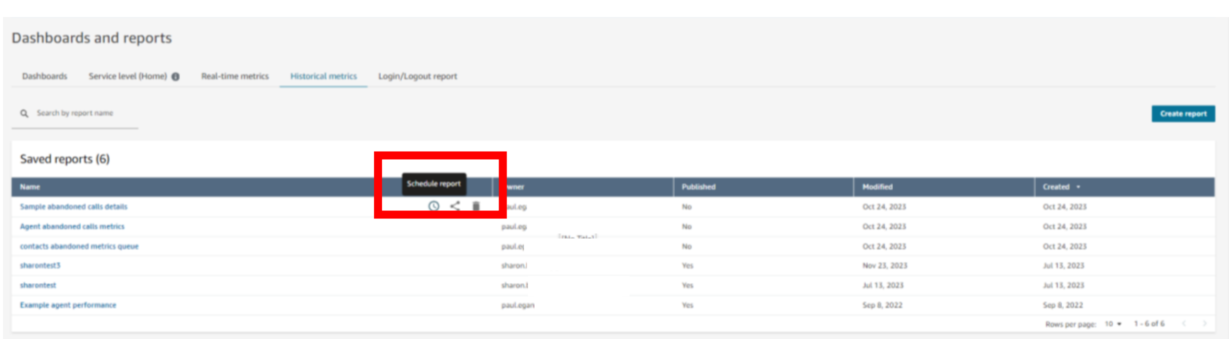


When you have the data as you need it you can save the report and give it a name. Saved Reports can be downloaded as CSV files for further processing or shared and scheduled as necessary if you have permission to do so.

Once a report is saved it is stored in the “Dashboards and Reports” section, under the relevant tab.

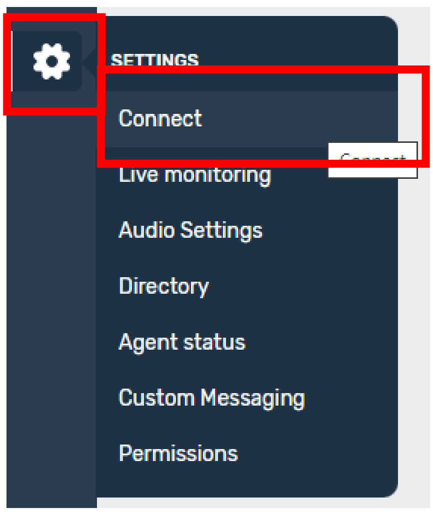


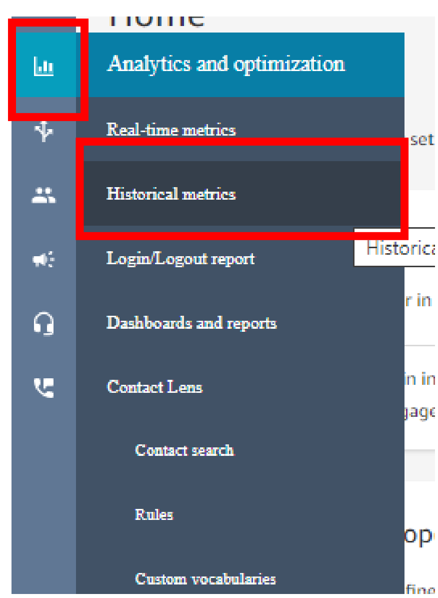
From this list page you can then select a report and delete it, or choose to share it or schedule it as required.



Access Historic metrics in Connect – Agents

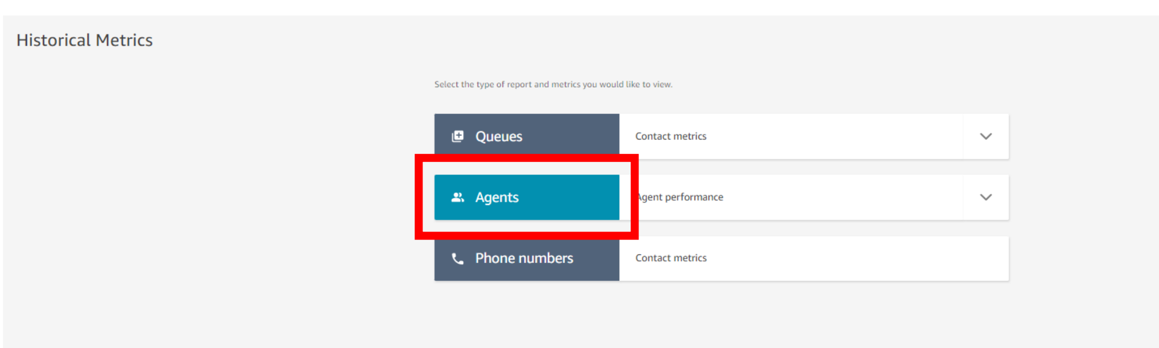
Historic metrics are available within the Amazon Connect application. As a supervisor you may be given access to this part of the application. Access may be restricted to just view reports, or you may also have the ability to create and share reports.





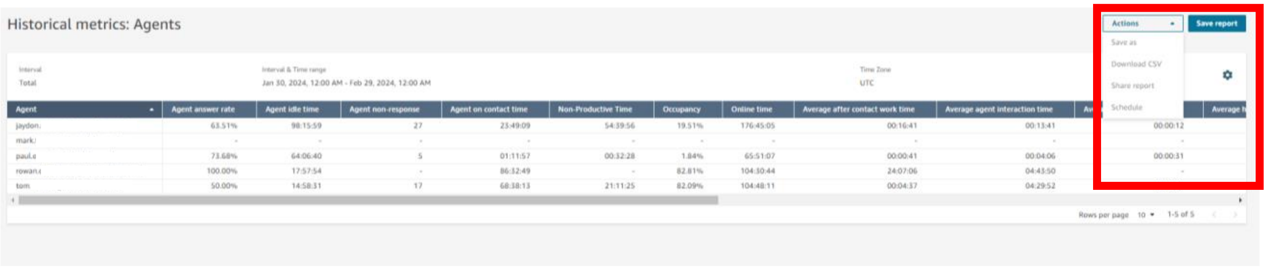
Connect can be accessed from the Settings menu – this will then open an additional tab in Amazon Connect. Historic and Realtime metrics, as well as other reporting features can be accessed from the “Chart” menu option.

You will then be presented with some options for what type of report you want to view or create. Each option will present a “standard” report which you can then reconfigure and save or share as appropriate. Reports can be scheduled to happen at regular intervals and be formed into dashboards in the Connect reporting section.



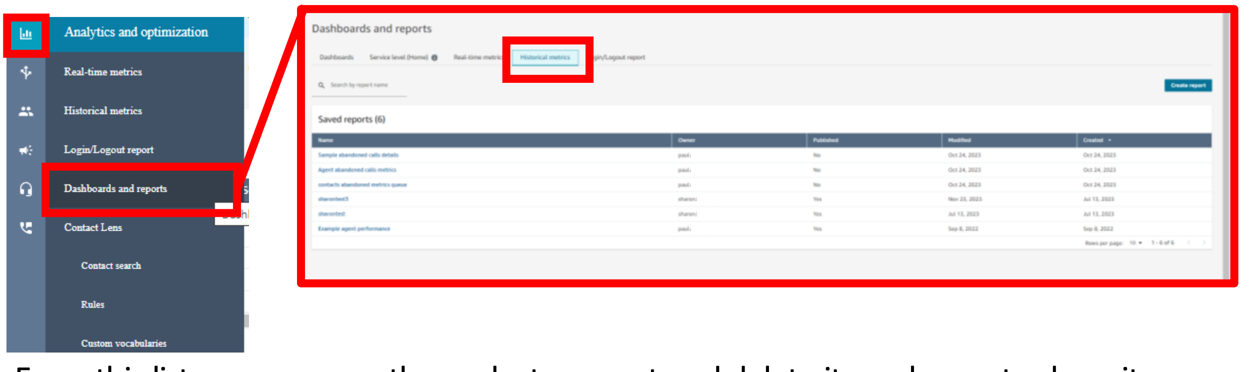
Access Historic metrics in Connect – Agents (Continued)

When you open a report it will have a standard set of columns – if you select the cog on the right hand side you can select additional metric columns, use varous groupings and filters to breakdown the data and amend the interval and time ranges as required.

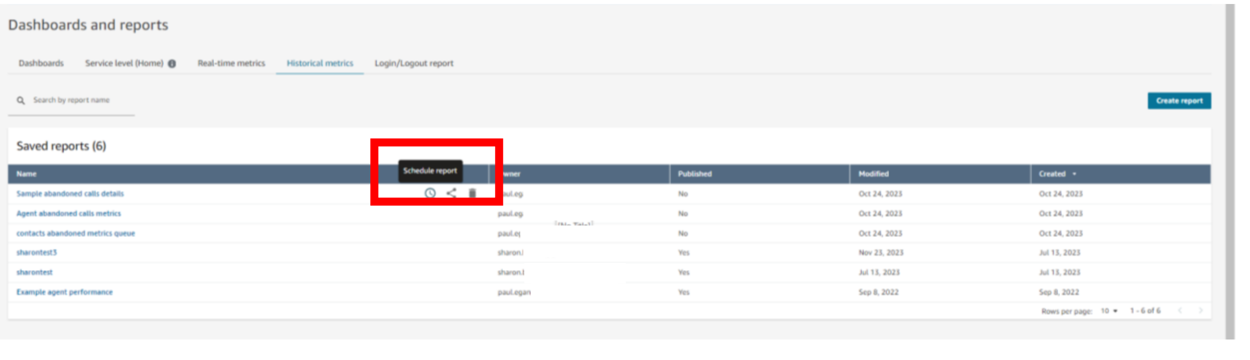


When you have the data as you need it you can save the report and give it a name. Saved reports can be downloaded as CSV files for further processing or shared and scheduled as necessary if you have permission to do so.

Once a report is saved it is stored in the “Dashboards and Reports” section, under the relevant tab.



From this list page you can then select a report and delete it, or choose to share it or schedule it as required.



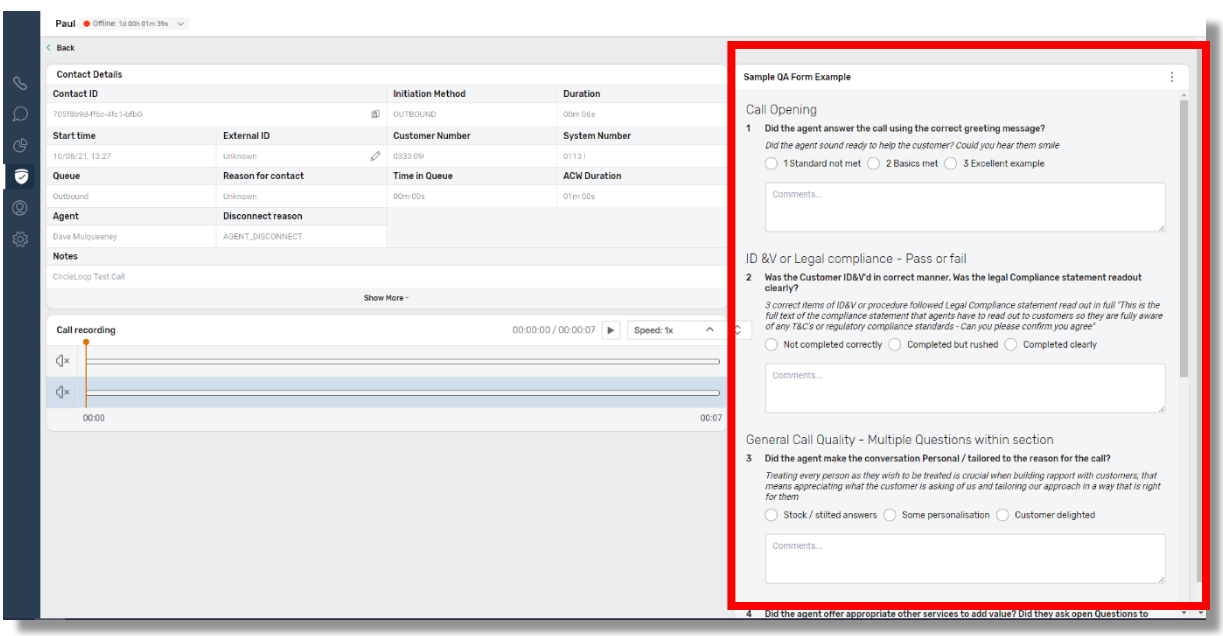
Module 5 Optional extras

By the end of this module, you will be aware of the following extra modules available within SmartAgent to enhance your customer journeys and increase Agent productivity:

- QA – Call Monitoring forms
- Case Management
- Automated rules
- PCI Payments
- CRM integration

QA Module – Call Monitoring forms

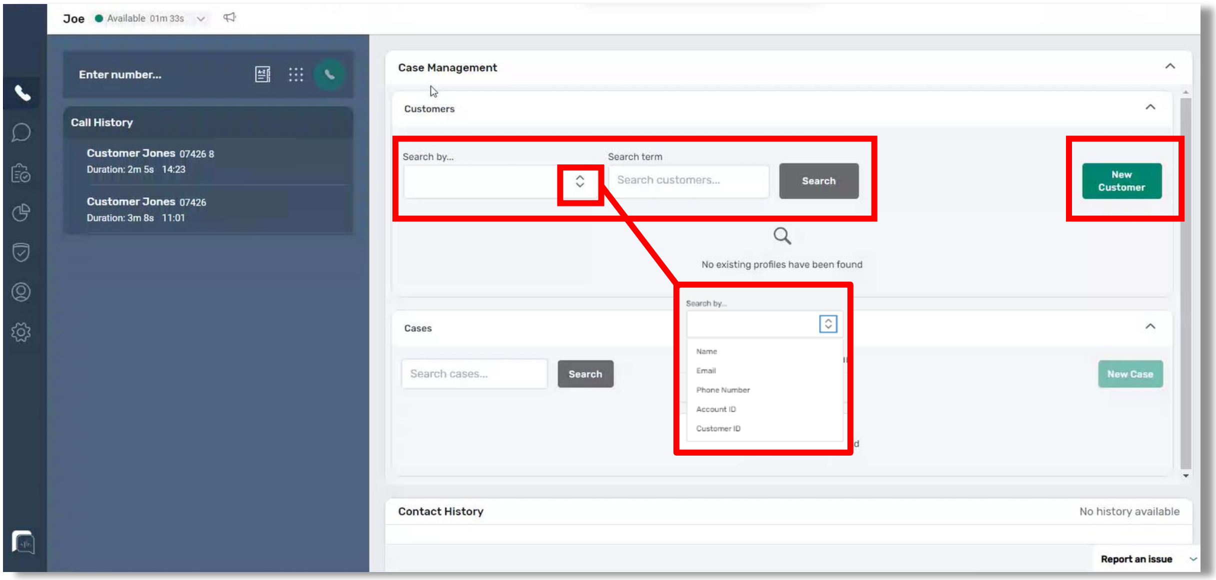
The QA module seamlessly integrates into SmartAgent allowing Supervisors to use onscreen forms to evaluate contacts handled by their agents. Customised forms can be created and implemented by your QA team to handle different channels and activities with consistent scoring and Calibration procedures built in.



Case Management

SmartAgent Case Management & Customer Profile Module is a modular addition to the standard SmartAgent build that can help you track customers and any associated cases that require a degree of escalation or management, across multiple channels.

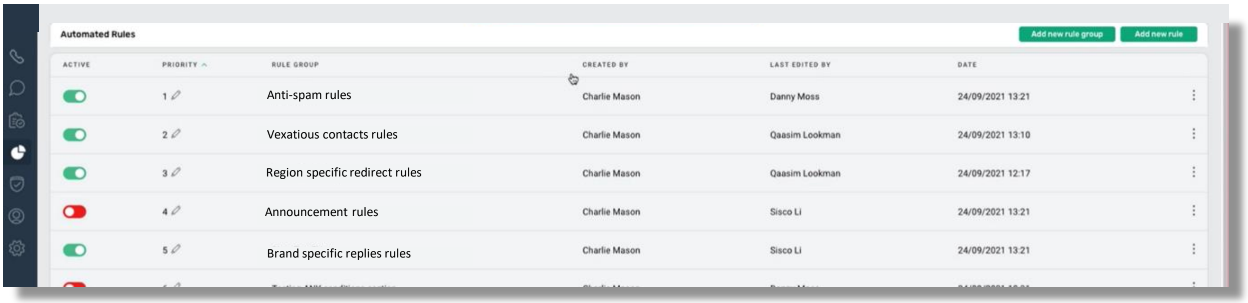
The module can support multiple channels and customer data can be automatically captured from customer inputs or other data sources and utilised to present the latest information on case progression to any agent that contacts the customer.



Automated Rules

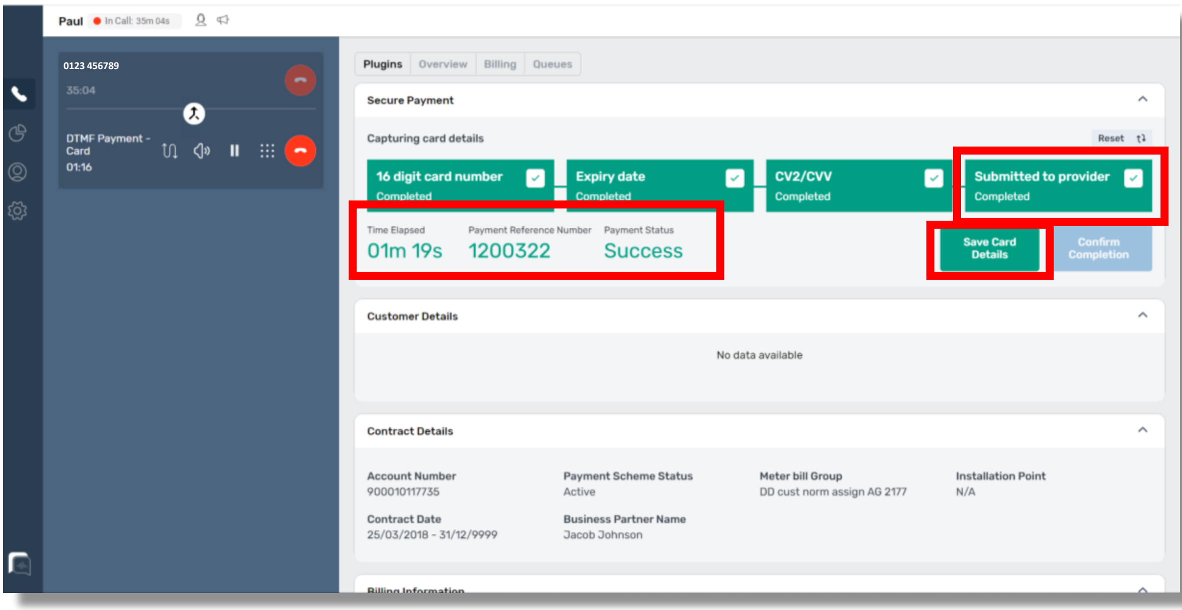
SmartAgent Automated Rules is a modular addition to the standard SmartAgent build that can help you deal with high volumes of email and social media traffic in a cost-effective way. Reducing the costs and demands on your Amazon Connect infrastructure by filtering out high volume contacts and sending automated replies or ending those from blocked contacts or dealing with disruptive vexatious contacts.

Automated rules can also be used to help you prepare for any potential need for crisis management messaging around high volumes or changes in circumstance or deal with much higher than usual traffic on a particular subject, or from a particular territory or region.



PCI Payments

SmartAgent PCI Payment plugin Module is a modular addition to the standard SmartAgent build that can help organisations deal with managing payments in a PCI compliant way, separating the customers card details from being accessible by Agents.



Deep CRM

We can integrate SmartAgent with your CRM solution or other systems to provide feedback to Agents on recent events with the customer, automation of ID&V procedures and surface live order and delivery information as the call arrives with the Agent.