



SmartAgent Training

Bootcamp – Automated Rules

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Introduction

The purpose of this guide is to provide you with an introduction to using the Automated Rules Module of SmartAgent.

About SmartAgent Automated Rules

SmartAgent Automated Rules is a modular addition to the standard SmartAgent build that can help organisations 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.

Even bulk responses can be tailored to include tailored branding or country specific messaging across multiple channels.

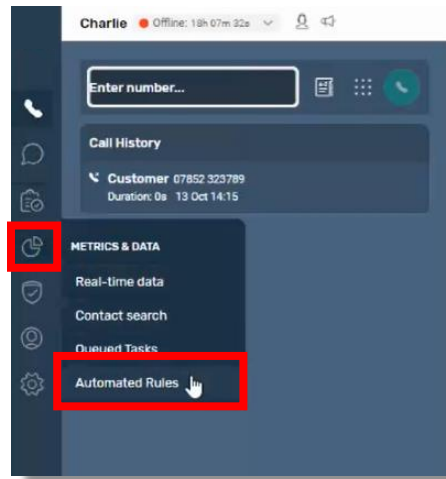
When creating Automated Rules, users should conduct testing to ensure they do not create rules with unforeseen outcomes, as this tool can be used to send out multiple replies to contacts or automatically end contacts before they are presented within the normal channels within SmartAgent and Amazon Connect.

Agenda

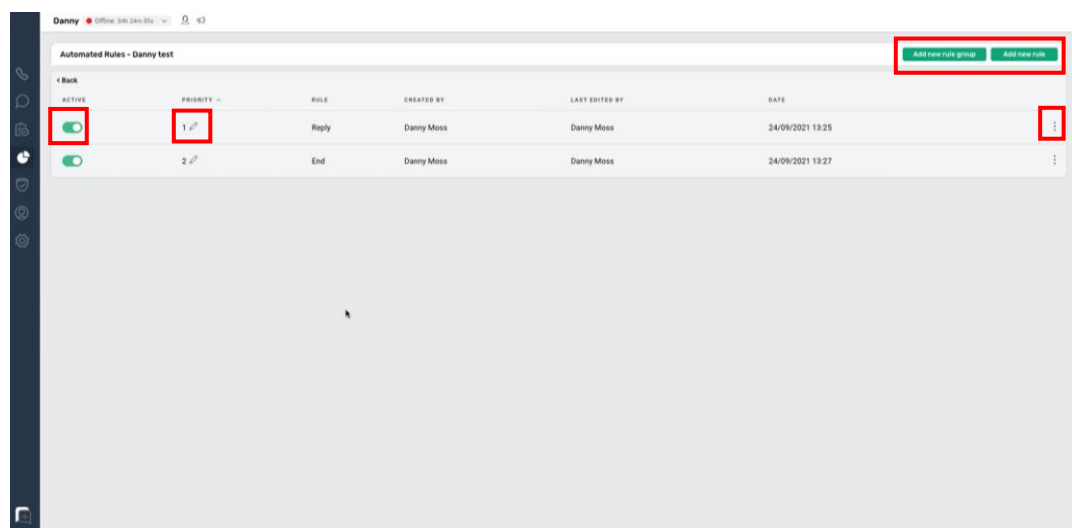
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Setting up Automated Rules – Basic Navigation

Creating an Automated Rule in SmartAgent is easy and can be accessed from the Metrics and Data menu if you have the necessary permissions in your Security Profile.



This will launch the Automated Rule Summary screen, from which you can select the button to “add a new rule group”, or the button to “add a new Rule” or select an existing Rule already in place and edit, copy or delete it.



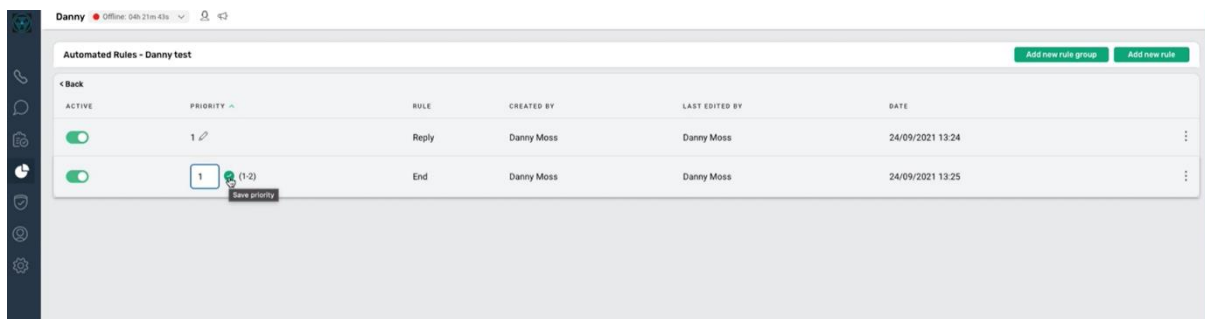
If you select the “Add new Rule Group” button you will be able to create a new Rule Group.

Rule Groups act like a folder structure for your rules, they could help you to manage different rules for departments or sub-brands, or different email and social media channels, so it might be a good idea to consider using a company wide naming convention to help you manage the rules within agreed Rule Groups.

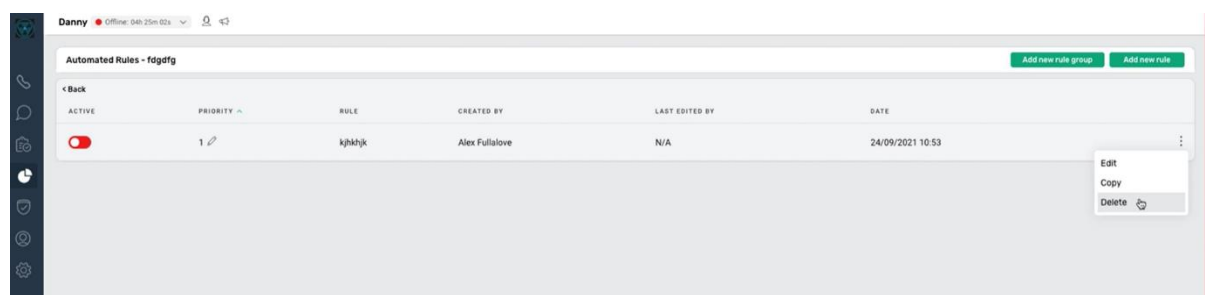
You can edit Rules to move them into different Rule Groups or copy an existing rule and renaming it to replicate this in a different group.

When you select the option to “add a new rule” you can also create a new Rule group from that screen.

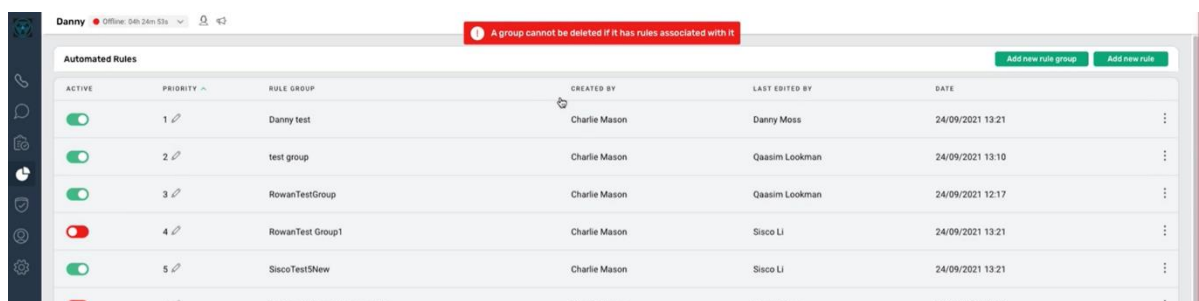
From this screen you can also toggle a rule on or off or change its Priority (this is the order in which your rules are processed). You may want to change the priority, particularly if you are using a rule to help deal with any sort of crisis management or high volume of a particular correspondence.



The screen also lists the creator of the rule and the user who last edited it. And the if you select the three dots at the end you can choose to edit, copy, or delete a rule.



You can’t delete a rule group if it has rules within it, so you would need to either move those rules into another rule group or delete them before the system will allow you to delete a Rule group.



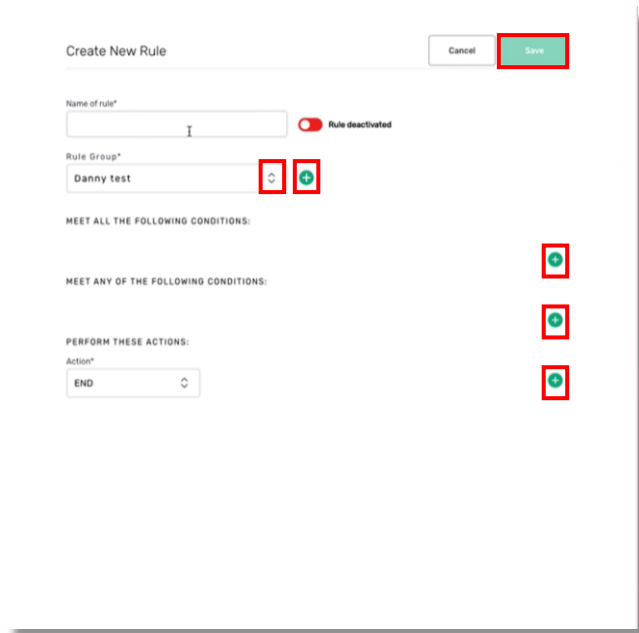
Adding a new Rule

When you select the Add a new rule button from the Automated rules summary screen a new screen appears (see below)

You will need to create a unique name for each rule, so it may be worth using a naming convention to make this easier to manage.

You can then select which Rule group you want this rule to be in, or select the green “+” symbol to create a new Rule group to place this rule in.

You can then build your rule by using the green plus symbols to add the elements you want the rule to look for and then take specific actions. For example, you could be looking for “body text” or “subject line” that are “equal to” or “include” certain key phrases.



You can then setup a series of actions based on these criteria, such as send an email or social media post reply that you specify move this correspondence to a different area, or simply just end the contact, for example if you have created a rule for to check against blocked email addresses and automatically end the correspondence rather than send an autoreply.

All new rules will start off in a “de-activated” status unless you toggle the switch to active. Given the power of the rules it may be a good idea to have one person create a rule, then have another user check it before activating it, or use this in a test environment first to check you haven’t disrupted other rules.

You also need to ensure that each rule has an “End” selected as the last action. To stop the rule from looping.

Once you are happy with your rule you can then select the “Save” button and activate the rule You may then want to amend where this rule sits in terms of Priority on the Summary screen. All new rules will automatically be placed as the last in the Priority list unless you amend it.

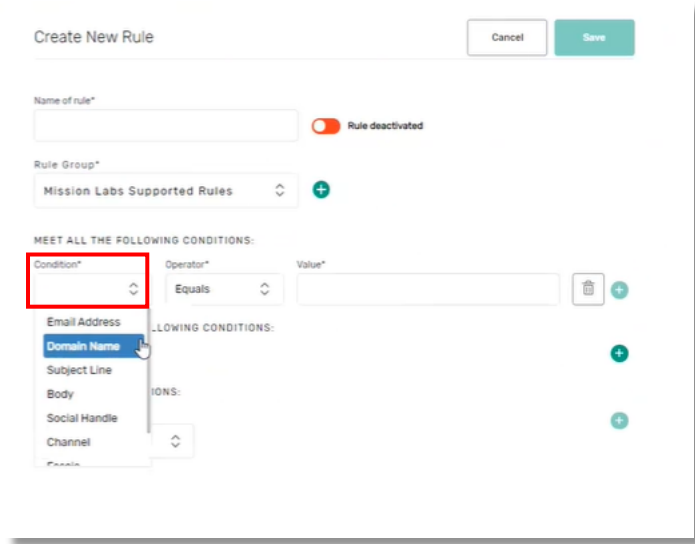
Rule Parameters & Options available

When you are creating a new rule, you will be presented with several different “Conditions”. Depending on the conditions you select you will then have a range of different “Operators” and “Values” presented from either dropdown lists or in some cases these will be free text fields.

Once you have selected these conditions you can then take a range of “Actions” in how the rule is applied.

Below is a list of the different options available.

“Conditions” Available



The full list of Conditions available is

Email Addresses

Subject Line (E.g., of an email)

Social Handle (username in social media account)

Channel (E.g., social media, email, Webform)

Sub Channel (specific interactions – e.g. allows you to apply rule to posting or replying within Facebook)

Fascia (This will be a pre-configured list used for different departments or brands)

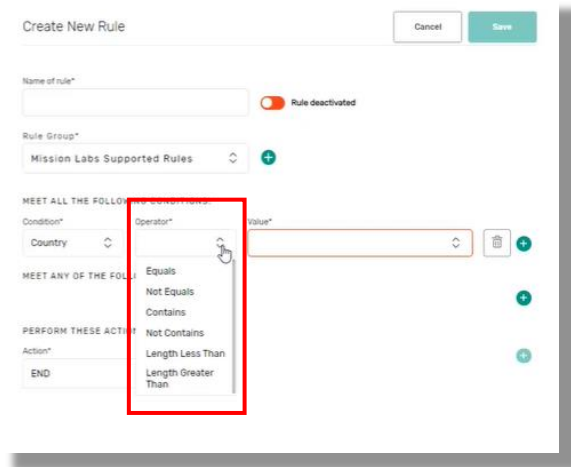
Country (Where contact originates from based on the extension. E.g. “.co.uk” = UK)

Business Email Address – This is used when using the “move” option

Domain Name

Body (Body of the text within the message)

“Operators” Available



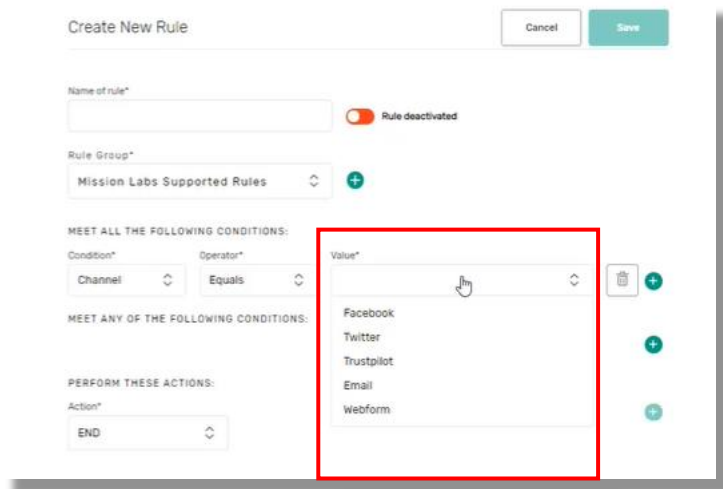
The screenshot shows the 'Create New Rule' form. The 'Operator' dropdown menu is open, displaying a list of operators: Equals, Not Equals, Contains, Not Contains, Length Less Than, and Length Greater Than. The 'Country' condition is selected, and the 'Value' field is empty.

The full list of Operators available is

Equals
Contains
Length less

Not Equals
Not Contains
Length greater than

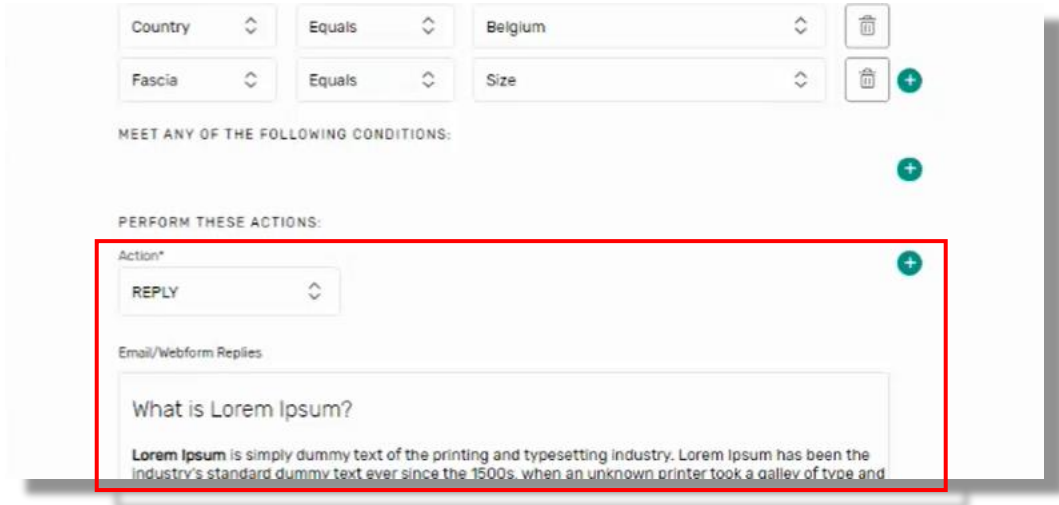
“Values” Available



The screenshot shows the 'Create New Rule' form. The 'Value' dropdown menu is open, displaying a list of values: Facebook, Twitter, Trustpilot, Email, and Webform. The 'Channel' condition is selected, and the 'Operator' is set to 'Equals'.

The “Values” available will either be a pre-determined list based on the condition you have entered (as illustrated above) or will be a free text field, where you are entering the value you want the rule to be searching for, such as an email address or a keyword to search for etc.

“Actions” Available



Country Equals Belgium

Fascia Equals Size

MEET ANY OF THE FOLLOWING CONDITIONS:

PERFORM THESE ACTIONS:

Action*

Email/Webform Replies

What is Lorem Ipsum?

Lorem Ipsum is simply dummy text of the printing and typesetting industry. Lorem Ipsum has been the industry's standard dummy text ever since the 1500s, when an unknown printer took a galley of type and

You can create multiple actions by selecting the green plus symbol but these will all fall into one of 3 categories,

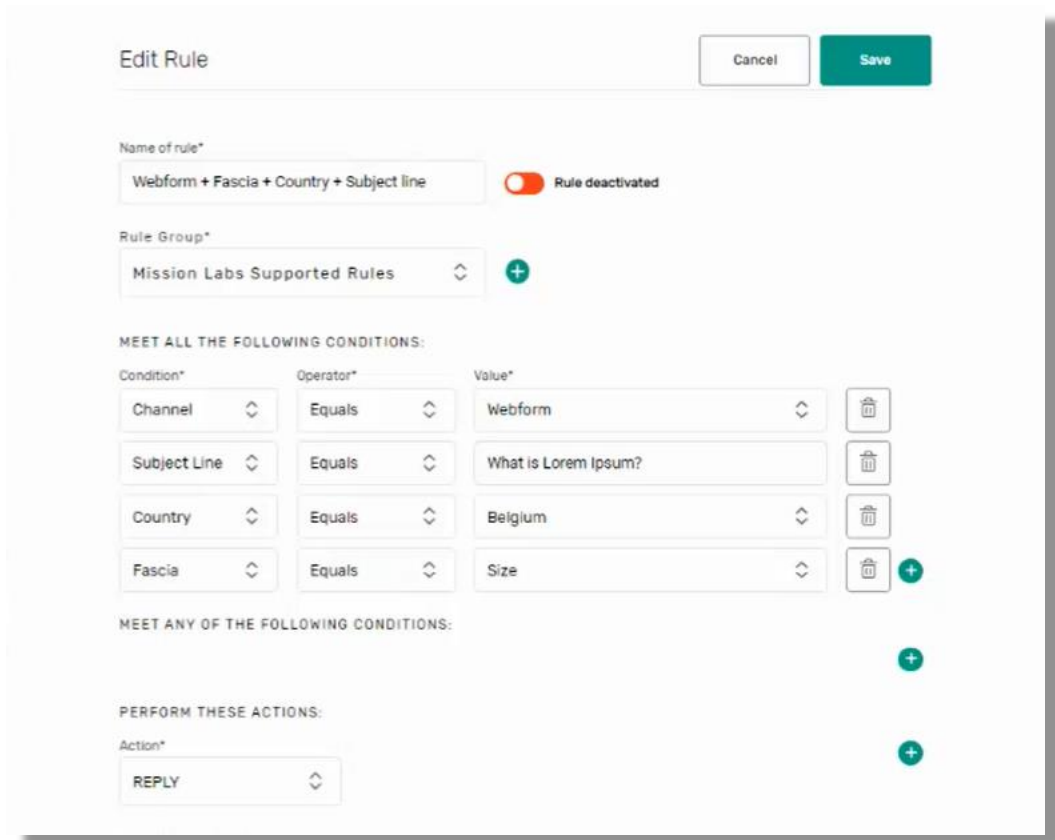
Reply – Will launch a template response window based on parameters entered e.g. email or social media

Move – Will launch a dropdown list, allowing you to route the message to a one of your existing queues.

End. – Will complete the actions and end the rule – this must always be in place at the end of a rule to stop it looping.

Rule Examples – Respond based on “Brand” or Country of origin

While these rules may not suit your organisation, they show some of the range of conditions you can have in a range and how you can have different responses.



Edit Rule Cancel Save

Name of rule*
Webform + Fascia + Country + Subject line Rule deactivated

Rule Group*
Mission Labs Supported Rules +

MEET ALL THE FOLLOWING CONDITIONS:

Condition*	Operator*	Value*
Channel	Equals	Webform
Subject Line	Equals	What is Lorem Ipsum?
Country	Equals	Belgium
Fascia	Equals	Size

MEET ANY OF THE FOLLOWING CONDITIONS: +

PERFORM THESE ACTIONS:

Action*
REPLY +

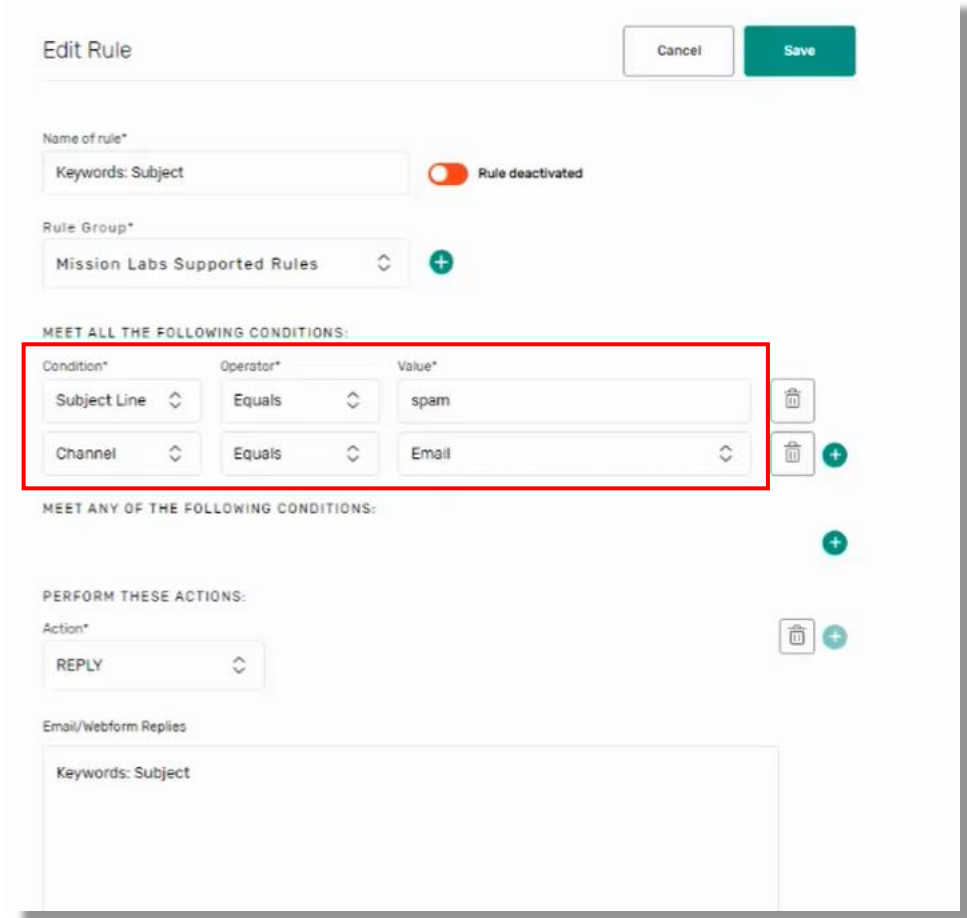
In this example we are searching webforms from a particular “Fascia” and country.

We would have agreed a list of “Fascia” that would for example equate to particular Brands, or websites from particular parts of the world. We can also condition results based by country code also.

The reply could then have the correct branding and imagery and language options appropriate for the country.

Rule Examples – Initiate action based on Keyword search

While these rules may not suit your organisation, they show some of the conditions you can have in a rule and how you can have different responses.



Edit Rule Cancel Save

Name of rule*
Keywords: Subject Rule deactivated

Rule Group*
Mission Labs Supported Rules +

MEET ALL THE FOLLOWING CONDITIONS:

Condition*	Operator*	Value*
Subject Line	Equals	spam
Channel	Equals	Email

MEET ANY OF THE FOLLOWING CONDITIONS:

PERFORM THESE ACTIONS:

Action*
REPLY

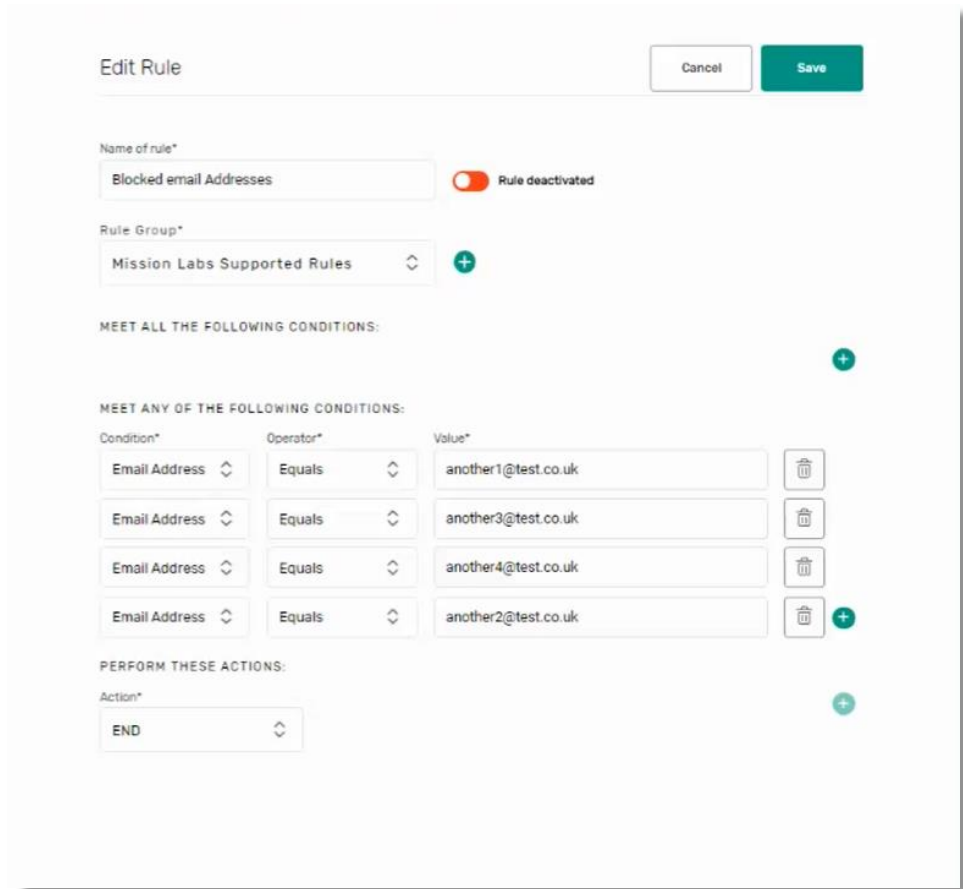
Email/Webform Replies
Keywords: Subject

In this example we are searching for the text “spam” in the subject line of any email and are preparing a response back. We could also search the main body text of the email for further information.

For example, if we wanted a more focused response we could also search for a “case number” in the subject or body text and create a different action response.

Rule Examples – Blocking individual email addresses

While these rules may not suit your organisation, they show some of the range of conditions you can have in a rule and how you can have different responses.



Edit Rule Cancel Save

Name of rule*
Blocked email Addresses Rule deactivated

Rule Group*
Mission Labs Supported Rules +

MEET ALL THE FOLLOWING CONDITIONS: +

MEET ANY OF THE FOLLOWING CONDITIONS:

Condition*	Operator*	Value*	
Email Address	Equals	another1@test.co.uk	✕
Email Address	Equals	another3@test.co.uk	✕
Email Address	Equals	another4@test.co.uk	✕
Email Address	Equals	another2@test.co.uk	✕ +

PERFORM THESE ACTIONS: +

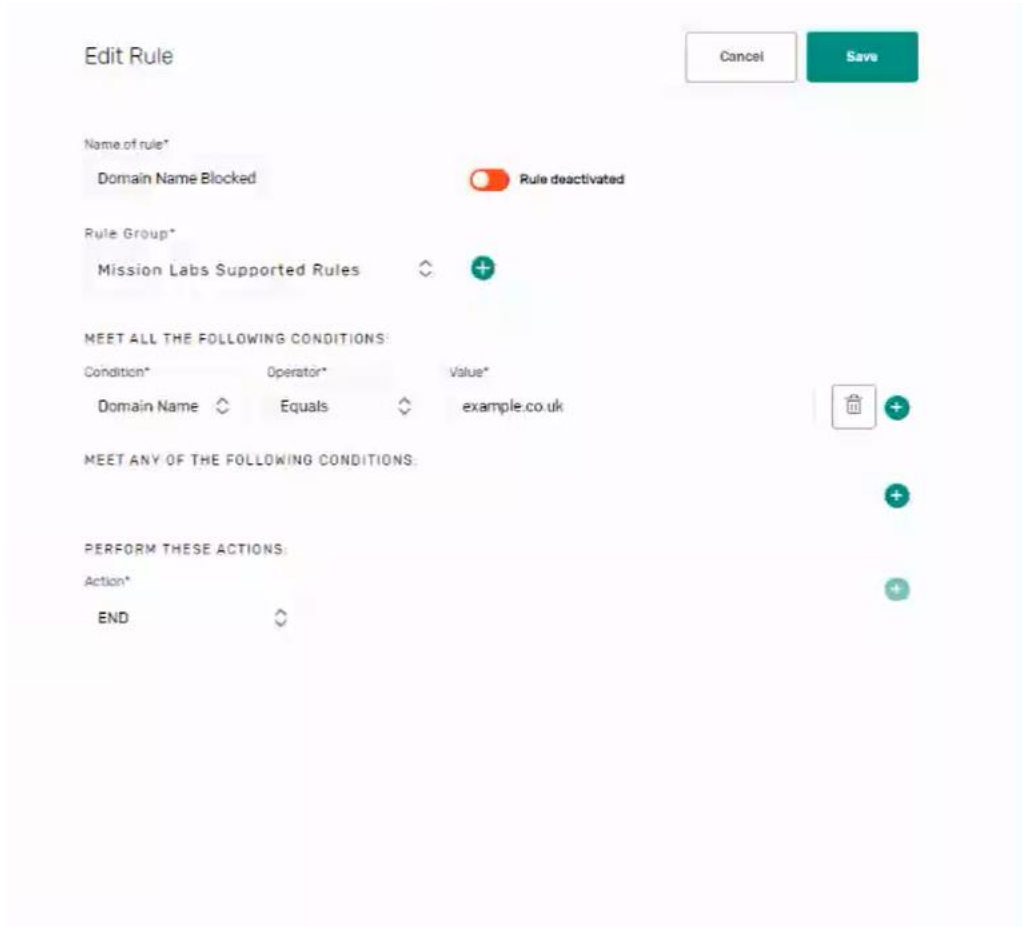
Action*
END

In this example any emails from the selected individual email addresses in the “value” not responded to and not brought into Amazon connect or SmartAgent for any further interaction.

Rule Examples – Blocking domains

While these rules may not suit your organisation, they show some of the range of conditions you can have in a rule and how you can have different responses.

In this example any type of communication tagged with the selected Domain name entered in the “value” will not be responded to and not brought into Amazon connect or SmartAgent for any further interaction.



Edit Rule Cancel Save

Name of rule*
Domain Name Blocked Rule deactivated

Rule Group*
Mission Labs Supported Rules +

MEET ALL THE FOLLOWING CONDITIONS:

Condition*	Operator*	Value*
Domain Name	Equals	example.co.uk

MEET ANY OF THE FOLLOWING CONDITIONS:

PERFORM THESE ACTIONS:

Action*
END

Rule Examples – Blocking Social Media Users

While these rules may not suit your organisation, they show some of the range of conditions you can have in a rule and how you can have different responses.

In this example we would be blocking any communication via facebook from these 2 specified users.

Edit Rule

Cancel

Save

Name of rule*

Block Facebook Users (mix)

☒ Rule deactivated

Rule Group*

Mission Labs Supported Rules

+

MEET ALL THE FOLLOWING CONDITIONS:

Condition*	Operator*	Value*	
Channel	Equals	Facebook	✕ +

MEET ANY OF THE FOLLOWING CONDITIONS:

Condition*	Operator*	Value*	
Social Handle	Equals	myhandle	✕
Social Handle	Equals	anotherhandle	✕ +

PERFORM THESE ACTIONS:

Action*	
END	+

Rule Examples – Applying a rule to different aspect of social media channel

While these rules may not suit your organisation, they show some of the range of conditions you can have in a rule and how you can have different responses.

You aren't just restricted to applying blanket rules across the whole of a social media channel.

You can also specify different rules or actions for an aspect of that social media channel by using the "Sub channel" Condition and then picking from the value's presented.

So in the example below we can create a rule for how to respond to a Twitter direct message, that might be different from a rule we have setup for responding to a Twitter post.

Create New Rule

CancelSave

Name of rule*

Sub channels

☒ Rule deactivated

Rule Group*

Mission Labs Supported Rules

+

MEET ALL THE FOLLOWING CONDITIONS:

Condition*

Operator*

Value*

Sub Channel

Equals

Facebook Message

Facebook Post

Twitter Message

Twitter Post

MEET ANY OF THE FOLLOWING CONDITIONS:

PERFORM THESE ACTIONS:

Action*

END

Rule Examples – Moving to a Different Queue

While these rules may not suit your organisation, they show some of the range of conditions you can have in a rule and how you can have different responses.

You can use the Automated Rules function to move specific emails into a different already established queue. In order for the “Move” function to work you need to select some exact options.

Conditions

The channel must be set to Email

You must use the “Business email Address”

Value

The email address you specify must have been verified, validated and stored in Amazon SES.

Actions

Select the “Move” action and then pick the Queue, from the dropdown menu. This will only present existing queues and should be a queue enabled to support email.

Create New Rule
Cancel
Save

Name of rule*
☒ Rule deactivated

Rule Group*
+

MEET ALL THE FOLLOWING CONDITIONS:

Condition*	Operator*	Value*	
Channel	Equals	Email	X
Business Email Address	Equals	your.businessaddress@here.co.uk	X +

MEET ANY OF THE FOLLOWING CONDITIONS:
+

PERFORM THESE ACTIONS:

Action*
☒ Stop At Rule ⓘ

Queue *

The final Action Setting to configure is the “stop at rule” option. If the Stop at rule is enabled (green) then further correspondence – e.g . an email thread from a contact will automatically follow this rule, rather than be evaluated each time.

MEET ANY OF THE FOLLOWING CONDITIONS:

PERFORM THESE ACTIONS:

Action*

MOVE

Queue *

Main Customer Care

Stop At Rule

Future messages will remain in the specified queue if this option is enabled

Because the “Move” option requires specific instructions, when you’re selecting the final options you will be presented with an onscreen reminder to ensure you have met all the criteria before saving and creating the new rule.

Create New Rule

Cancel Save

Name of rule*

Demo of Move Rules

Rule deactivated

Rule Group*

Demo group hi

MEET ALL THE FOLLOWING CONDITIONS:

Condition*	Operator*	Value*
Channel	Equals	Email
Business Email Address	Equals	your.businessaddress@here.co.uk

MEET ANY OF THE FOLLOWING CONDITIONS:

PERFORM THESE ACTIONS:

Action*

MOVE

Stop At Rule

Queue *

When the move action is selected, the following requirements must be met:

- The Business Email Address condition must be selected and the operator must be Equals
- The Channel condition must also be selected, with the Equals operator and the value Email
- A queue must be selected in the queue dropdown

Notes

