PRODUCT OF AGNOINTEL

USER GUIDE

Click2Go

Table of Contents

1. Document Control

1.1. REVISION HISTORY

Date	Version	Status	Description	Author
April 15th	V1.0	Initial Version	Click2GO- WhatsApp and SMS Channels	Click2Go Product Team

2. Introduction

Welcome to Click2Go – AI-Powered Omnichannel Marketing at Its Best!

In today's fast-paced digital world, reaching your audience effectively requires more than just marketing, it demands intelligence. At Click2Go we revolutionize customer engagement with AI-powered omnichannel marketing, ensuring your brand connects with the right audience at the right time through WhatsApp campaigns, SMS marketing, voice outreach, and more.

Why Choose Us?

✅ AI-Driven Personalization – Deliver targeted, data-driven campaigns with precision.
✅ Omnichannel Reach – Seamlessly connect via WhatsApp, SMS, voice, and beyond.
✅ Automation & Efficiency – Streamline communication with smart automation.
✅ Higher Engagement & Conversions – Maximize customer interaction with AI-optimized strategies.

Whether you're a small business or an enterprise, we empower you to amplify your marketing, boost engagement, and drive growth like never before.

Let's transform your customer outreach- smarter, faster, and more effective!

Get Started Today!

3. User Login

3.1. Sign-In

To Sign-In to the Click2Go follow the steps given below,

Step 1: Open the Chrome browser.

Step 2: Enter https://click2go.ai/ in the address bar to access the console.

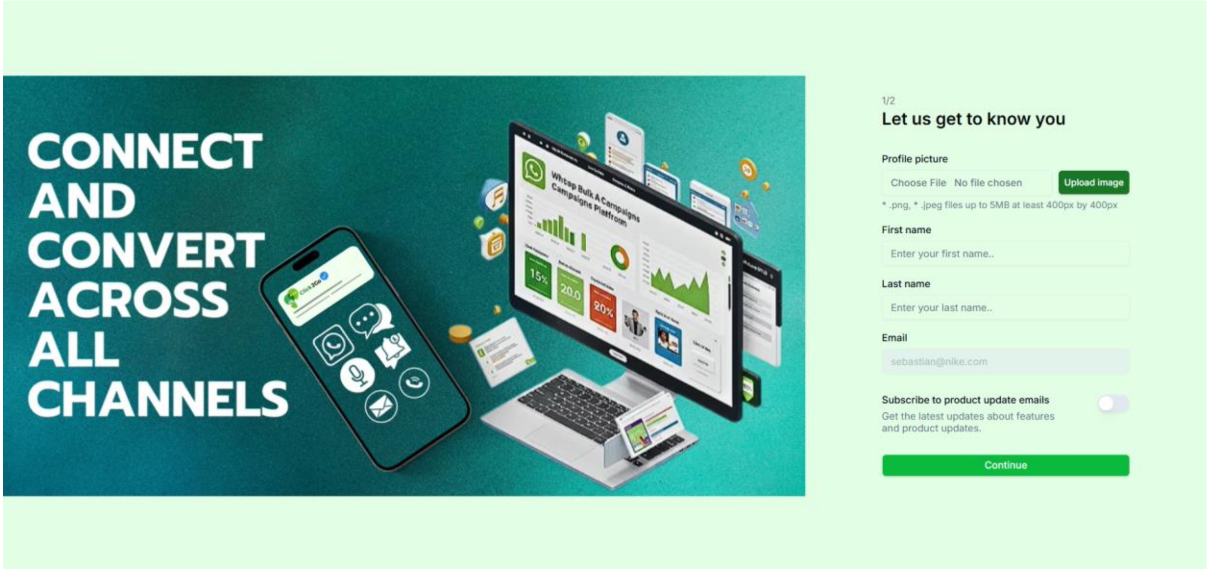
Step 3: Click on the Sign Up button on the top right corner of the page. And the below page will be viewed.

Step 4: Enter your email ID and password.

Step 5: Click **Sign Up with Email**.

Step 6: Check your email for an OTP and enter it in the designated field. As given in the below page.

Step 7: Once the verification is completed, the subscription page will appear as below. Fill in your details and complete the subscription.



Step 8: Click **Continue** to finalize the sign-up process. You will be notified once registration is complete.

1.1 Login

To Login to the Click2Go follow the steps given below,

Step 1: Enter your email and password on the login page.

Step 2: An OTP will be sent to your email. Enter it in the designated field.

Step 3: After successful verification, you will be redirected to the admin console.

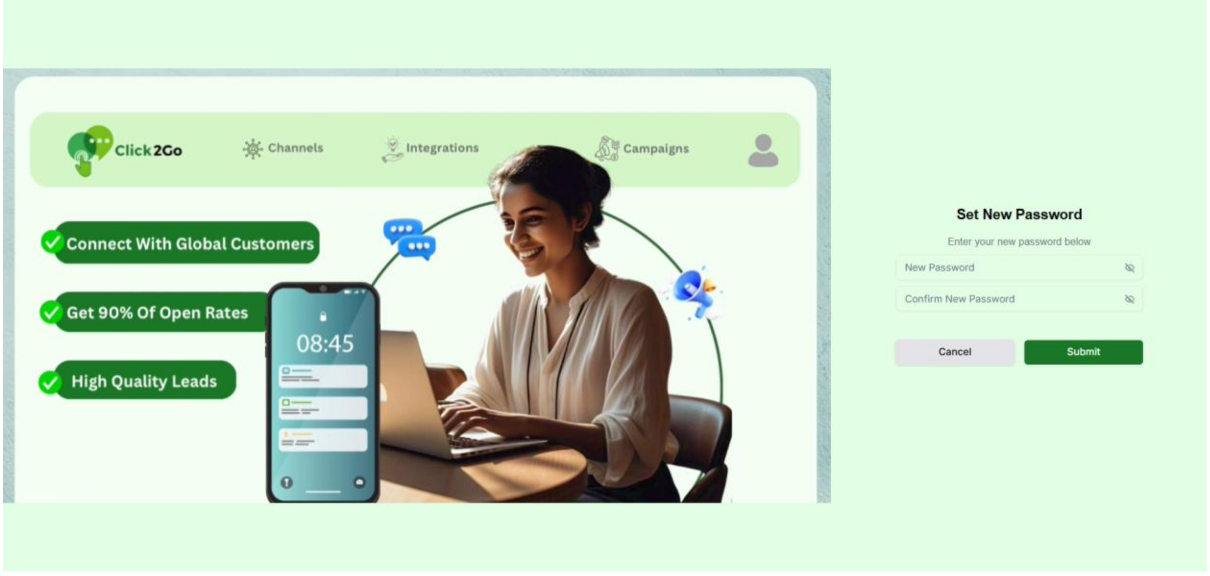
Forget Password.

1.1.1 Forget Password

Step 1: On the login page, click the **Forgot Password** option which will redirect to the Reset Your Password Page.

Step 2: Enter your registered email ID.

Step 3: Open the link sent to your email and follow the instructions to create and confirm a new password.



Step 4: Use your newly created password to log in to the admin console.

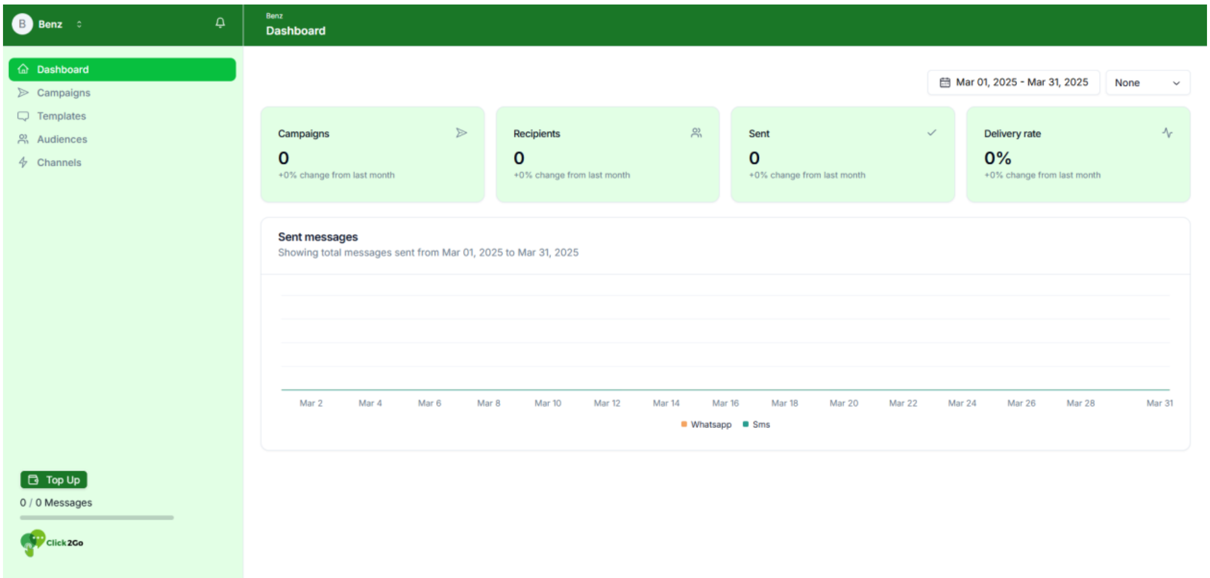
1.2 Advertiser Module

1.2.1 Dashboard

The **Click2Go Dashboard** provides a comprehensive view of messaging campaign performance, displaying key metrics such as the number of campaigns, recipients, sent messages, and delivery rate. A graphical representation tracks message trends over time, categorized into SMS and WhatsApp.

The left-side navigation allows easy access to **Campaigns, Templates, Audiences, and Channels**, while a **Top-Up** feature helps manage message limits.

With date filters for customized insights, this dashboard offers a clear and efficient way to monitor and optimize communication efforts.



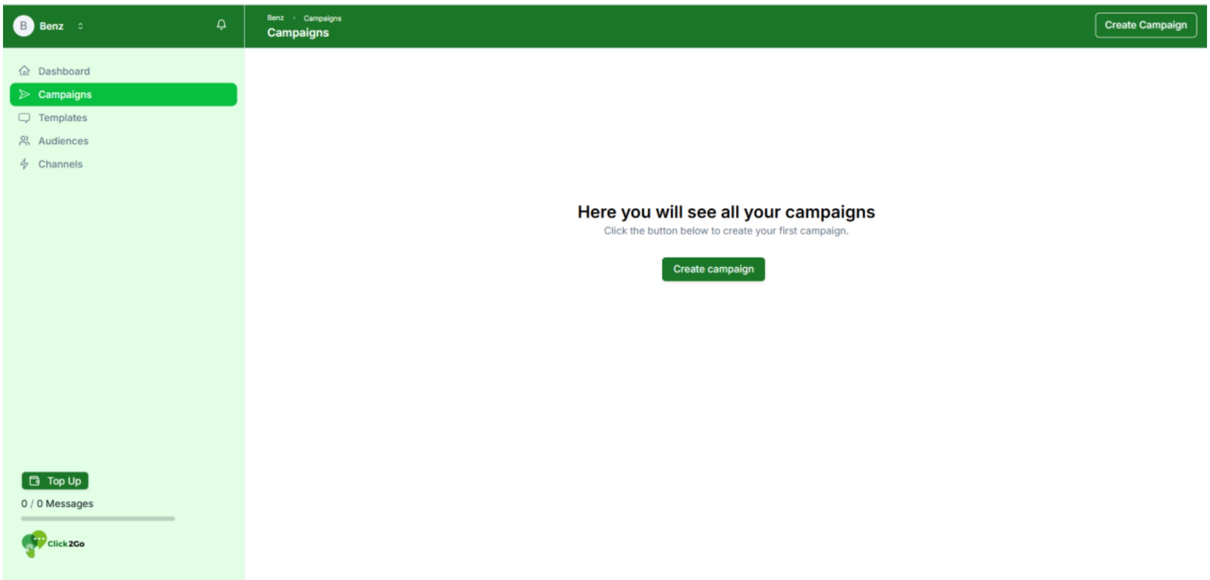
1.2.2 Date Range Filter

The **date range selection** allows users to filter data, track performance within a specific time frame.

1.3 Campaigns

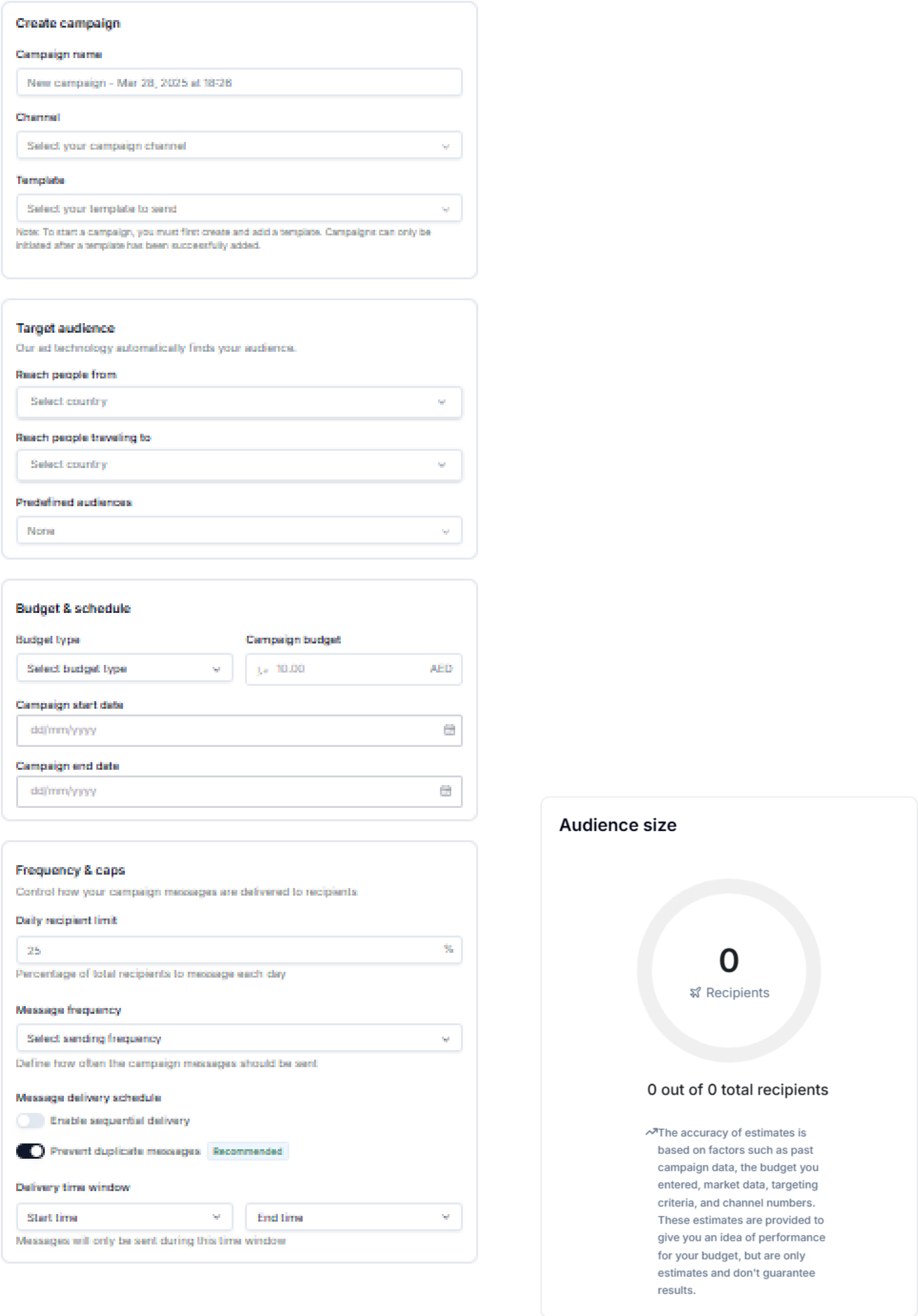
A Description of the features and the steps to create a campaign are given as follows,

Step 1: Click on the Campaigns Tab in the Side Panel, which will navigate to the Campaign Lists Page



Step 2: Select the required campaign from the list, if created.

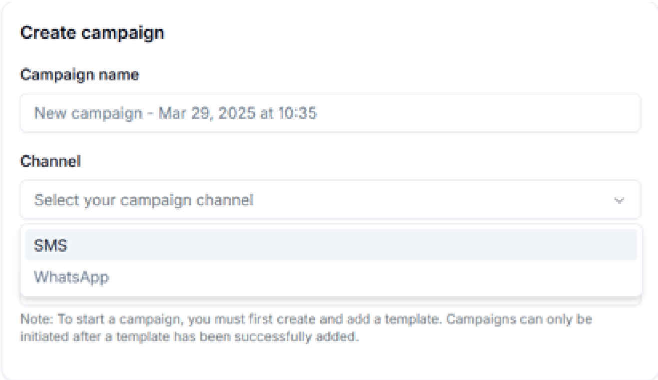
Step 3: To create a new Campaign, Click on the **Create Campaign Button.**



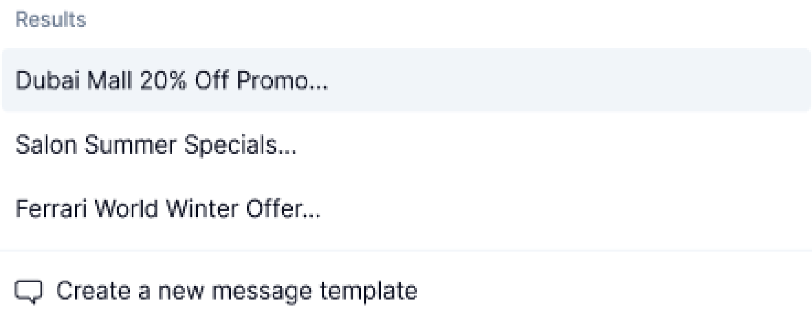
Step 4: Fill in the required details displayed on the page**.**

Create Campaign

Step 4.1: Enter a Campaign name as desired and Select the type of channel to be created for the campaign.

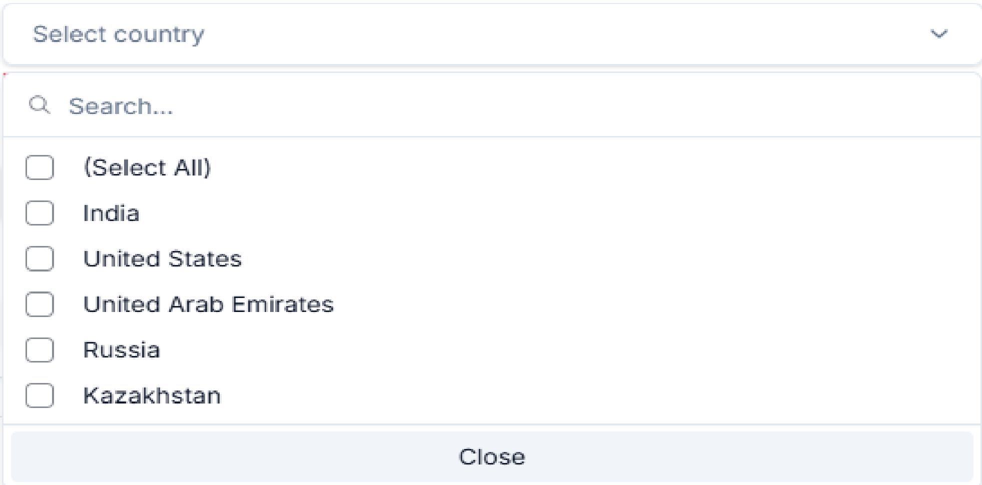


Step 4.2: Search and select for the required templates or select the Create a new message template to create your own message template.

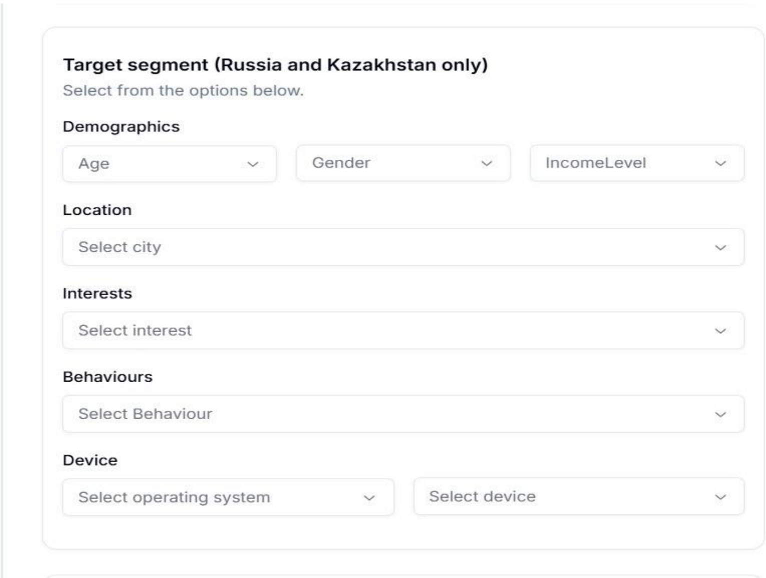


Target Audience

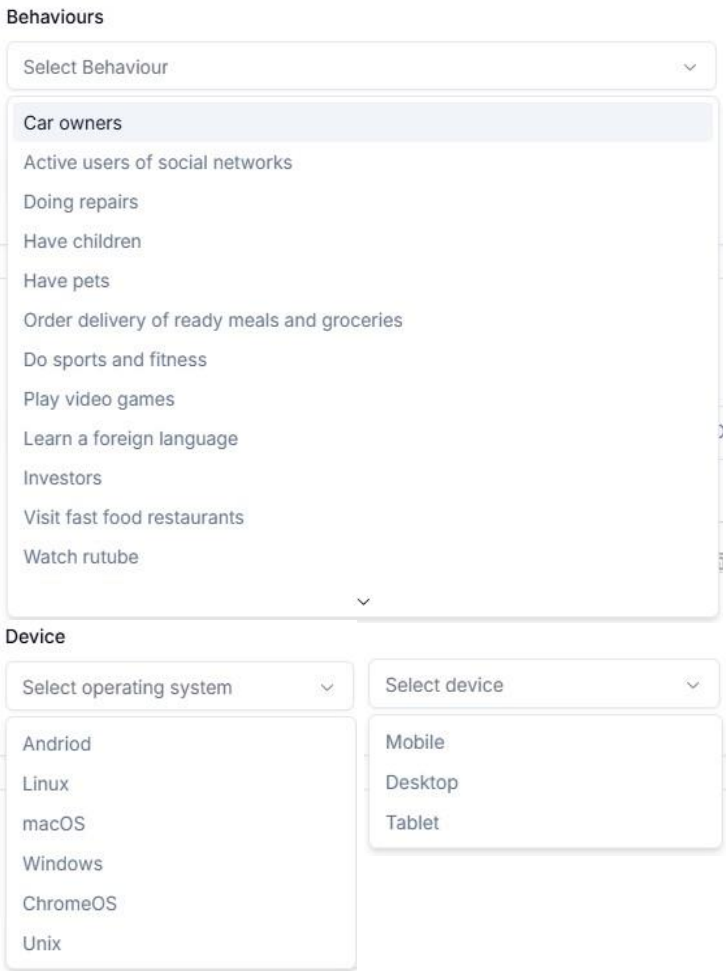
Step 4.3: Select Country to reach people from the provided dropdown menu.



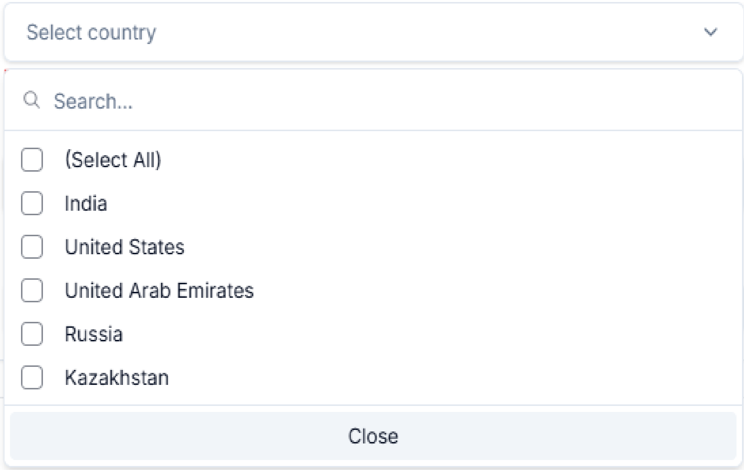
Based on the selected countries, **Target Segment** details will be asked to be filled in.



Step 4.3.1: Fill in the data as per your requirements from the each dropdowns listed Demographics, Location, Interests, Behaviours and Device.



Step 4.4: Select Country to reach people from the provided dropdown menu.

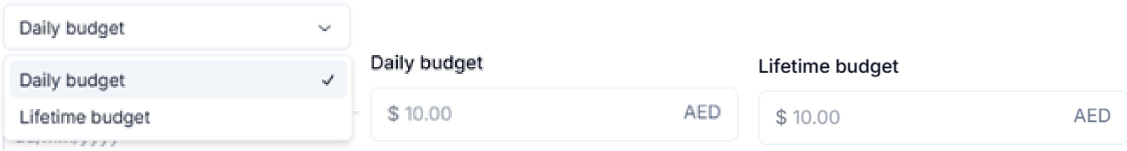


Step 4.5: If you have predefined audience, you can select it.

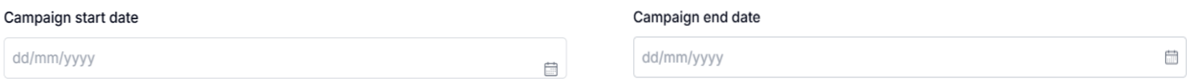
Budget and Schedule

Step 4.6: Select the budget type from the dropdown.

Based on the selection, you can enter the amount based on your country's currency.

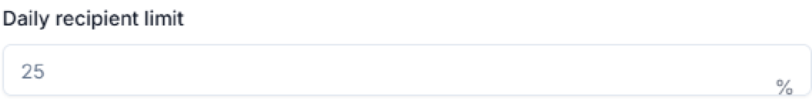


Step 4.7: Select the start and end date of the Campaign.

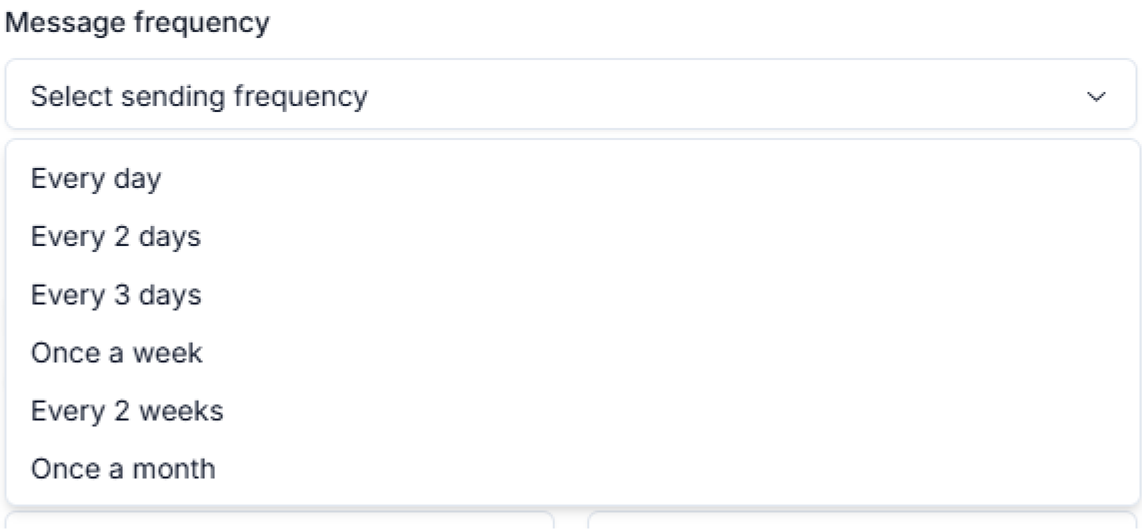


Frequency and Caps

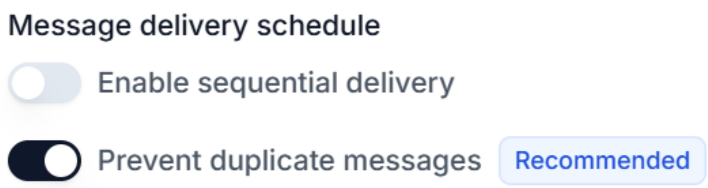
Step 4.8: You can control your campaign messages that are delivered to the recipients. By entering the daily recipient limit.



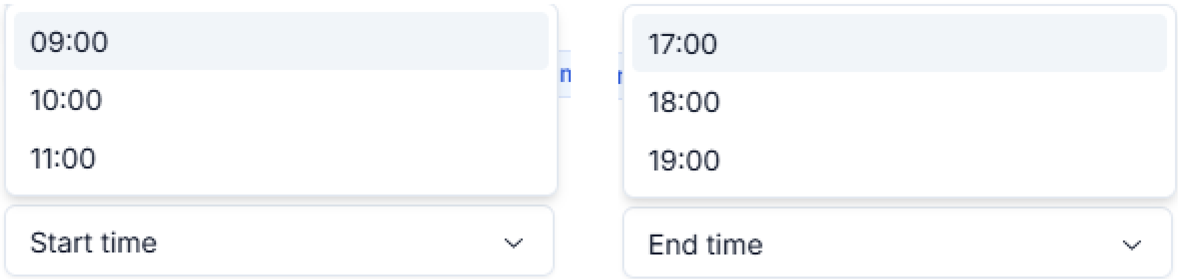
Step 4.9: You can also select the frequency of the messages sent.



Step 4.10: You can schedule your message delivery to be sequential or to prevent duplicate messages.

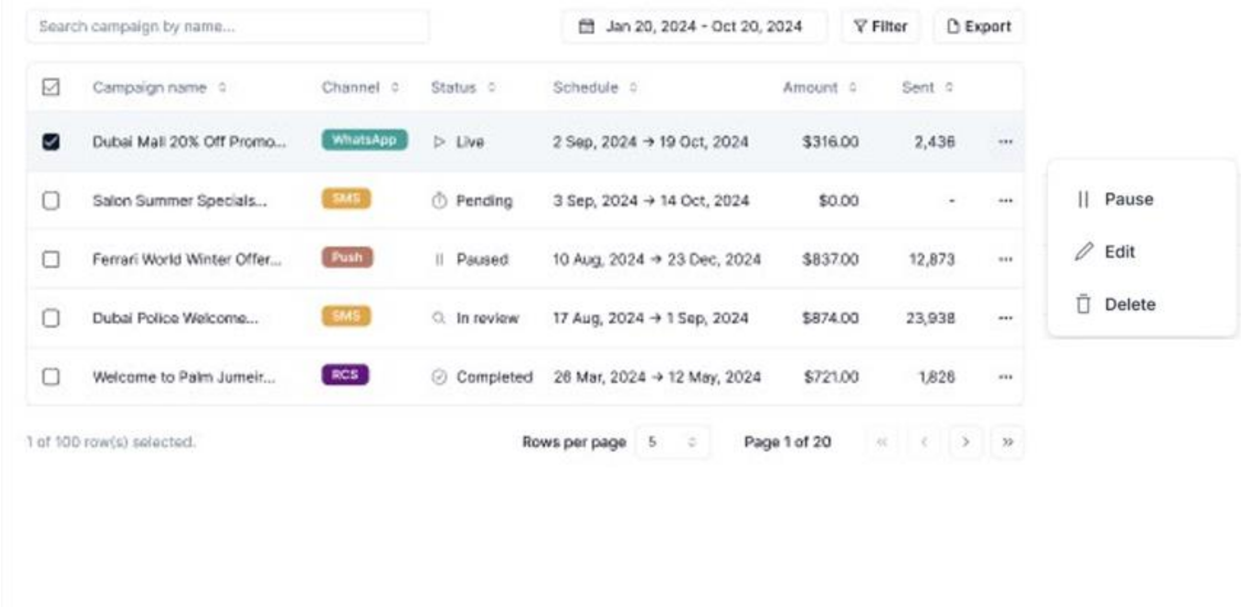


Step 4.10: You can also manage the time window for the messages to be sent by setting the start and end time.



Once you have created the campaign you can review and finalize your campaign details, you can also filter the campaign, export as document based on time intervals selected.

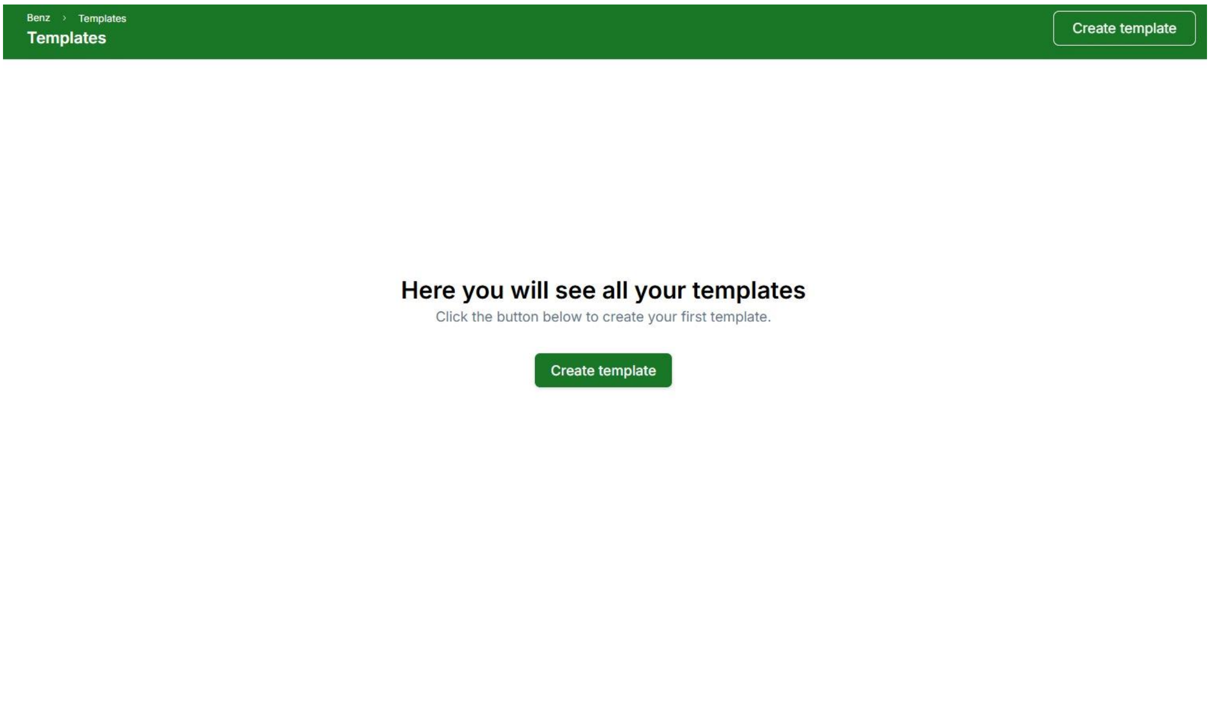
The created campaign will now be listed in the campaigns page, which can also be paused, edited and deleted by selecting these features under action button.



1.4 Templates

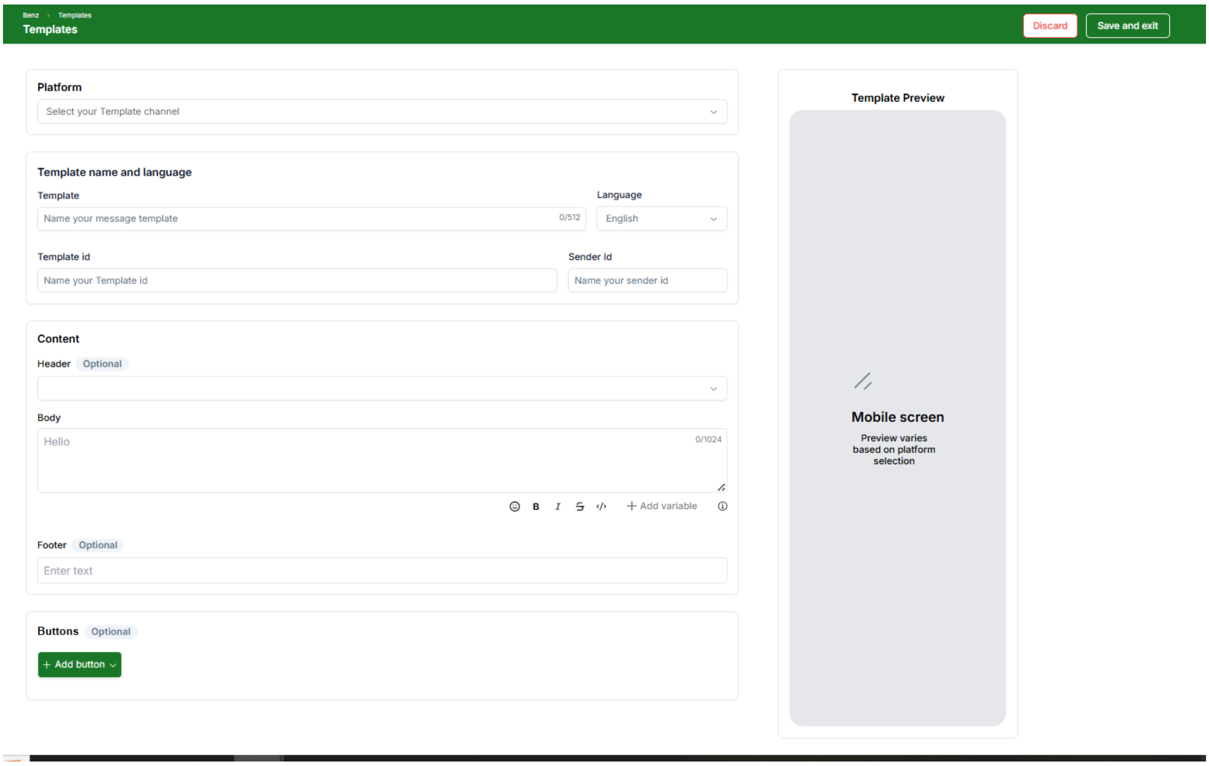
A Description of the features and the steps to create a template are given as follows,

Step 1: Click on the Templates Tab in the Side Panel, which will navigate to the Template Lists Page.



Step 2: Select the required template from the list, if created.

Step 3: To create a new template, Click on the **Create Template Button.**



Step 3: Fill in the necessary details.

Step 3.1: You can select your channel platform

Step 3.2: You can select your Template name and select your language

Step 3.3: You can add header, body and Footer to your content Template

Step 4: After entering the details add interactive buttons for customer responses.

Step 5: You can see Template preview based on your platform selection

Step 6: You can discard or save & exit your template

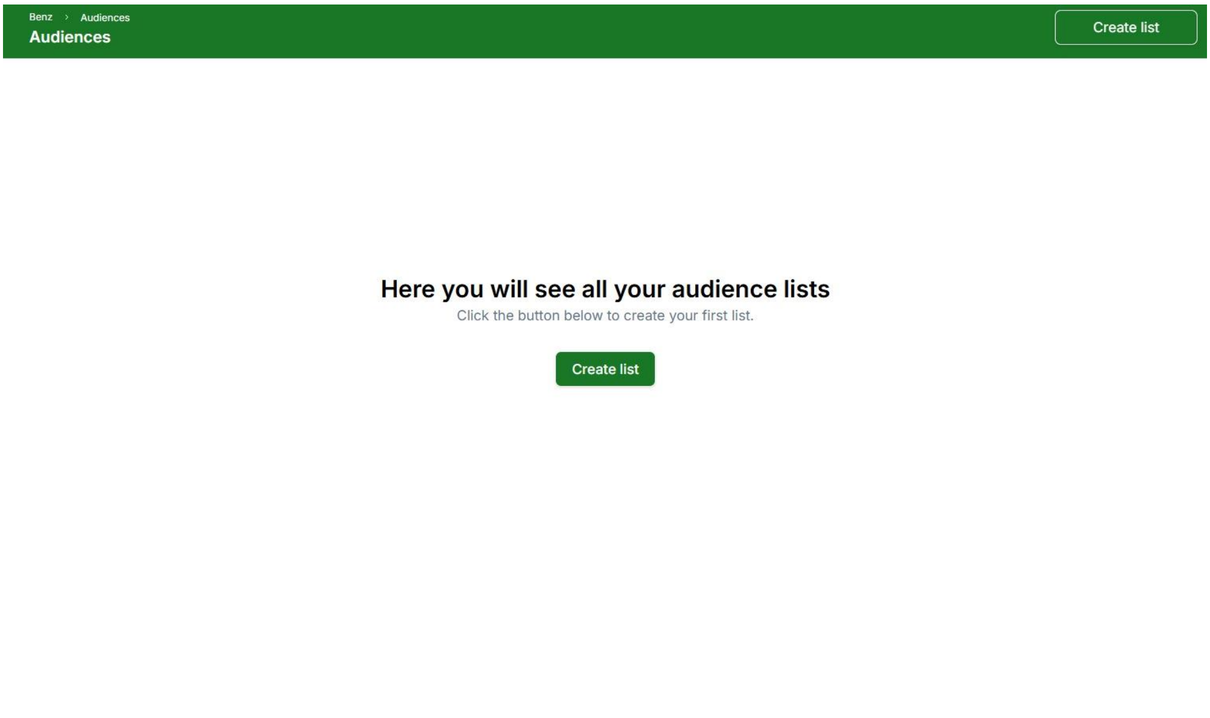
Once you have created the templates, you can review and finalize your template details, you can also filter the template.

The created template will now be listed in the templates page, for which the status can be approved, rejected, paused, in review, completed by selecting these statues under action button.

1.5 Audiences

A Description of the features and the steps to create a Audiences are given as follows,

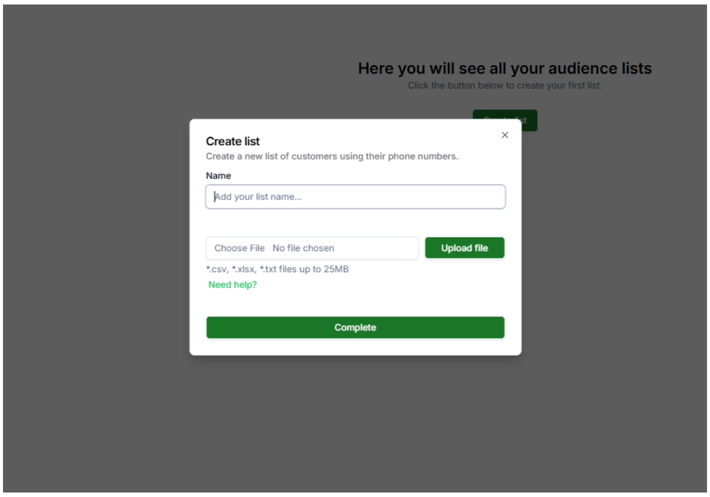
Step 1: Click on the Audiences Tab in the Side Panel, which will navigate to the Audiences Lists Page.



Step 2: Select the required audiences from the list, if created.

Step 3: To create a new Audience list, Click on the **Create List Button.**

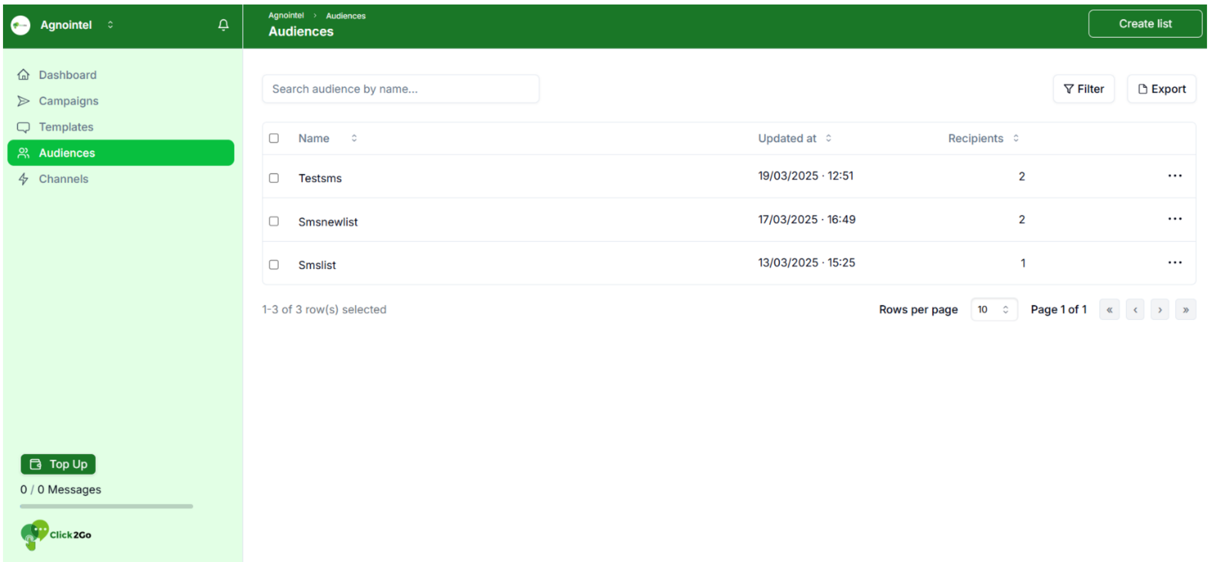
Step 4: The below pop up will open to add list. Create the name of the list and add the list of audience to the workspace.



Step 3: Click on the Complete button once uploaded.

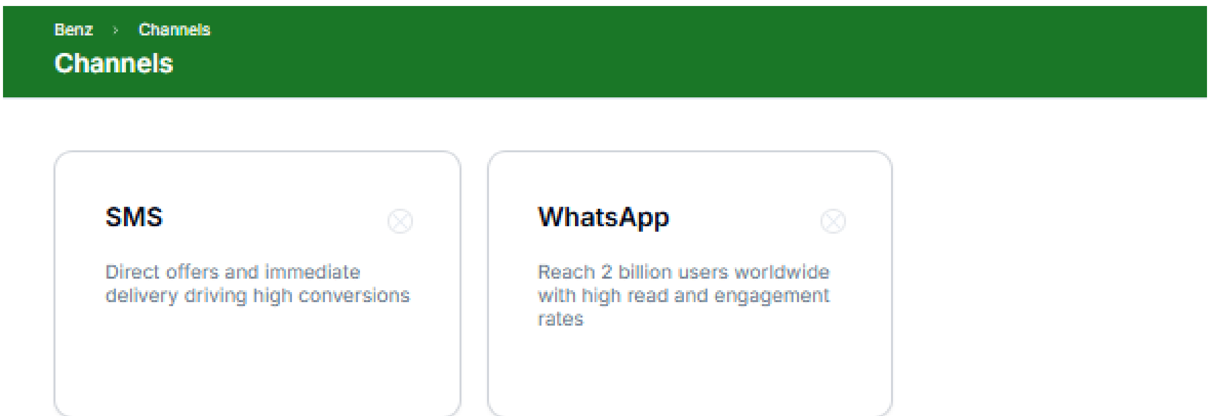
Once you have created the list, you can review and finalize your audience list, you can also filter the list, export as document based on time intervals selected.

The created list will now be listed in the Audiences page, along with the updated at time and recipient count.

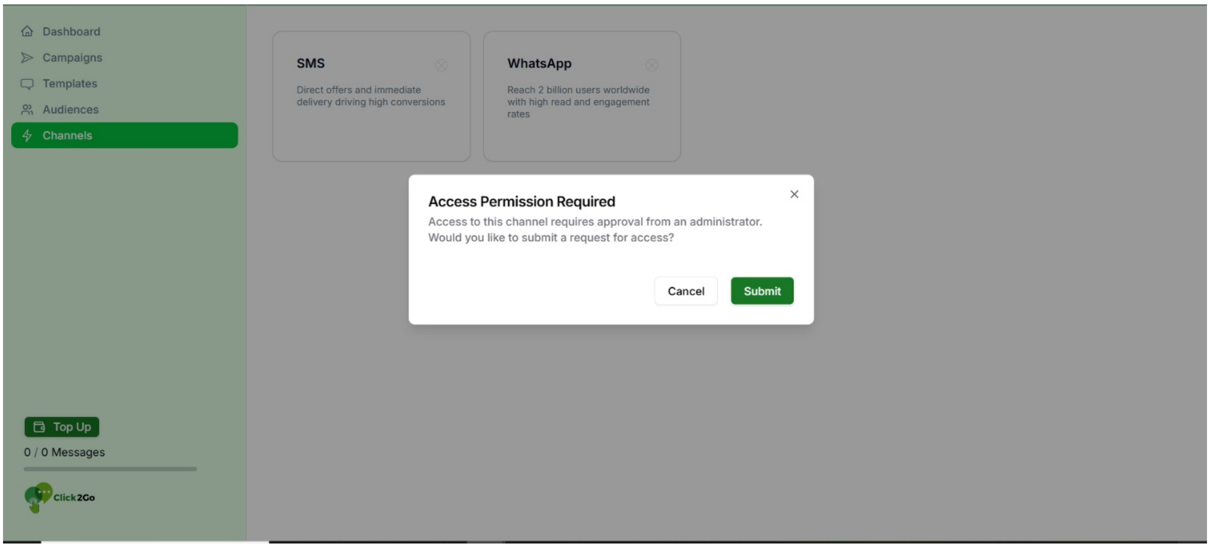


1.6 Channels

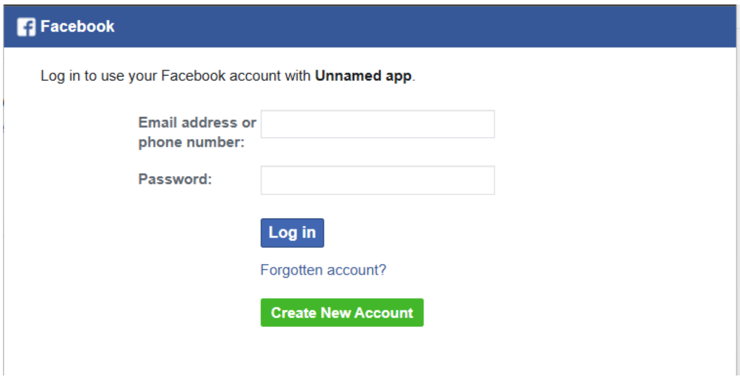
Our product includes an integrated feature to create and manage WhatsApp campaigns, enabling seamless communication and engagement with your audience.



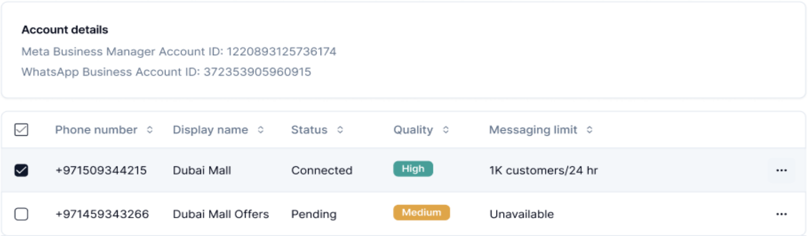
Step 1: Select **WhatsApp** from the Channels menu.



Step 3: Click connect button, the below pop up screen will appear follow the embedded sign up flow from META to connect your WhatsApp business account with Click2Go



Now you can check the Status , Quality and Messaging limit to your account

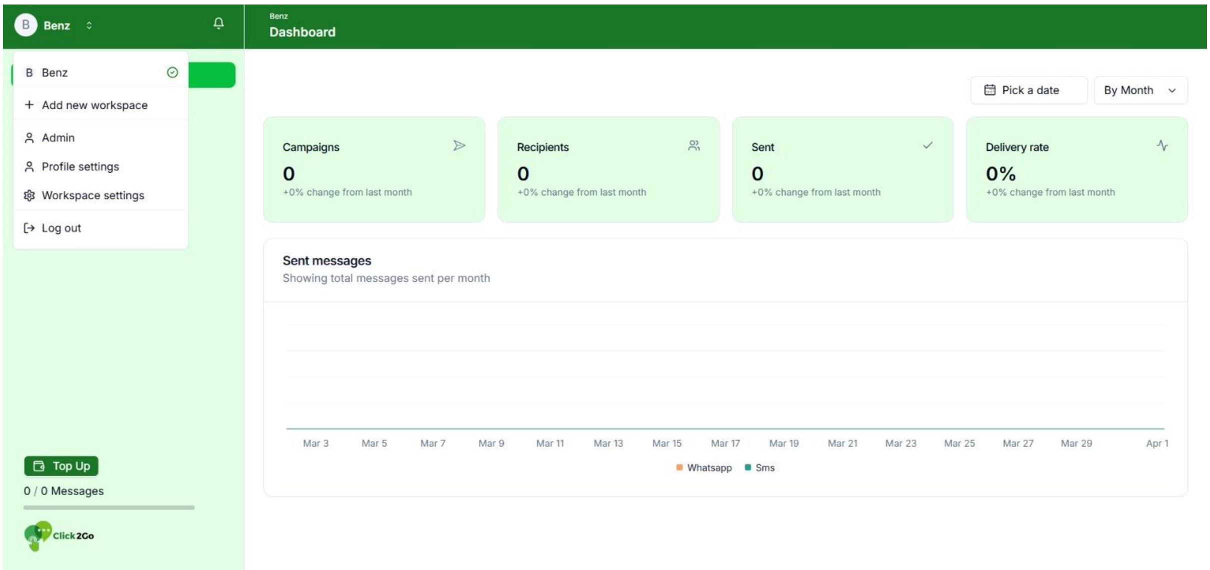


Account details
Meta Business Manager Account ID: 1220893125736174
WhatsApp Business Account ID: 372353905960915

	Phone number	Display name	Status	Quality	Messaging limit	
☑	+971509344215	Dubai Mall	Connected	High	1K customers/24 hr	...
☐	+971459343266	Dubai Mall Offers	Pending	Medium	Unavailable	...

1.7 User Profile:

Click your profile in the dropdown various menu will be there.

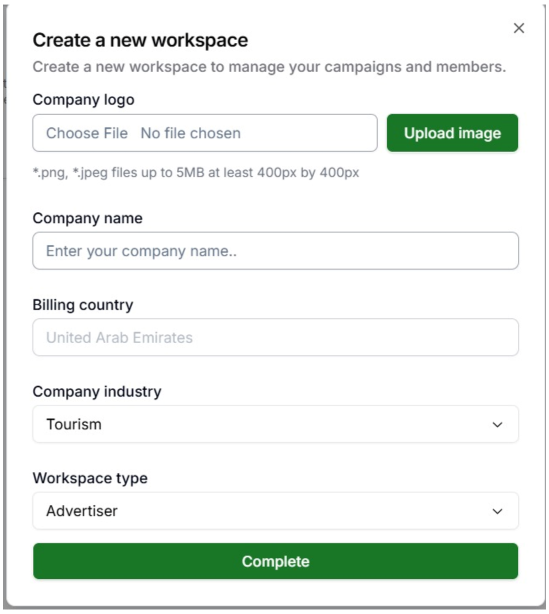


1.7.1 Add New Workspace

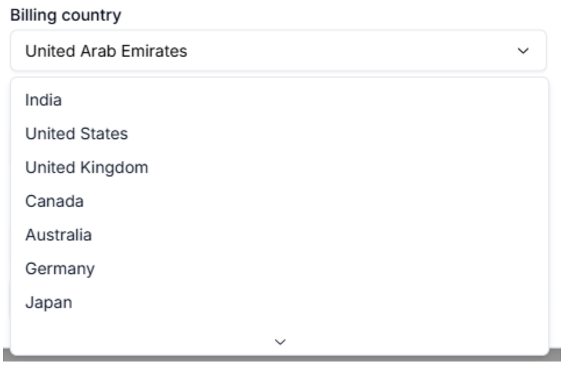
Step 1: Click add new workspace

Step 2: Fill the below details to add new workplace to your profile

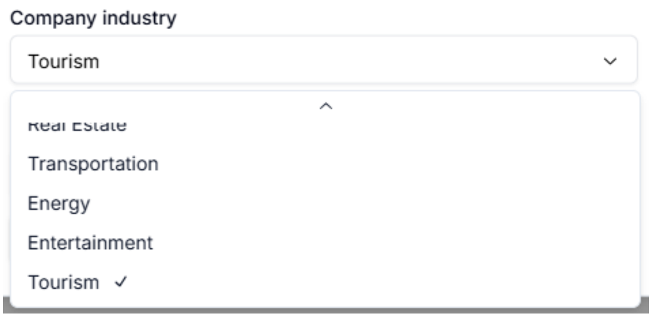
Step 3: Upload company logo and enter your company name



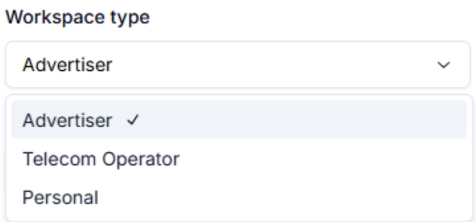
Step 4: You can select your billing country from below dropdown



Step 5: You can select industry of your company from below dropdown

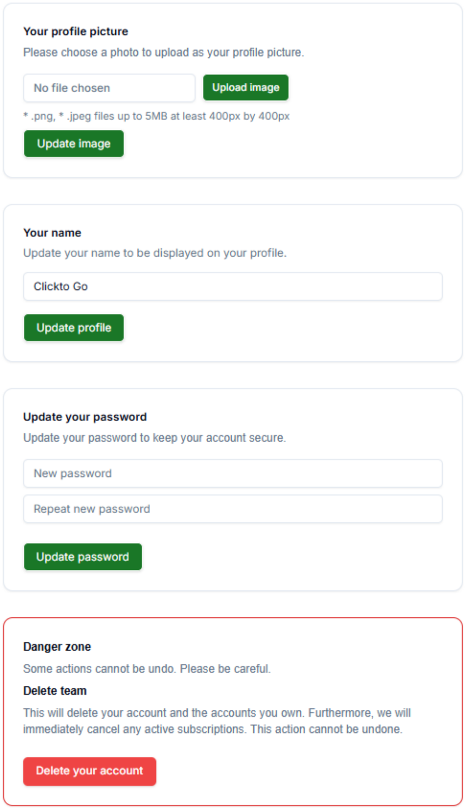


Step 6: You can select your workspace type from below dropdown



1.7.2 PROFILE SETTINGS:

Step 1: Update your profile details in the **Profile Settings** section.



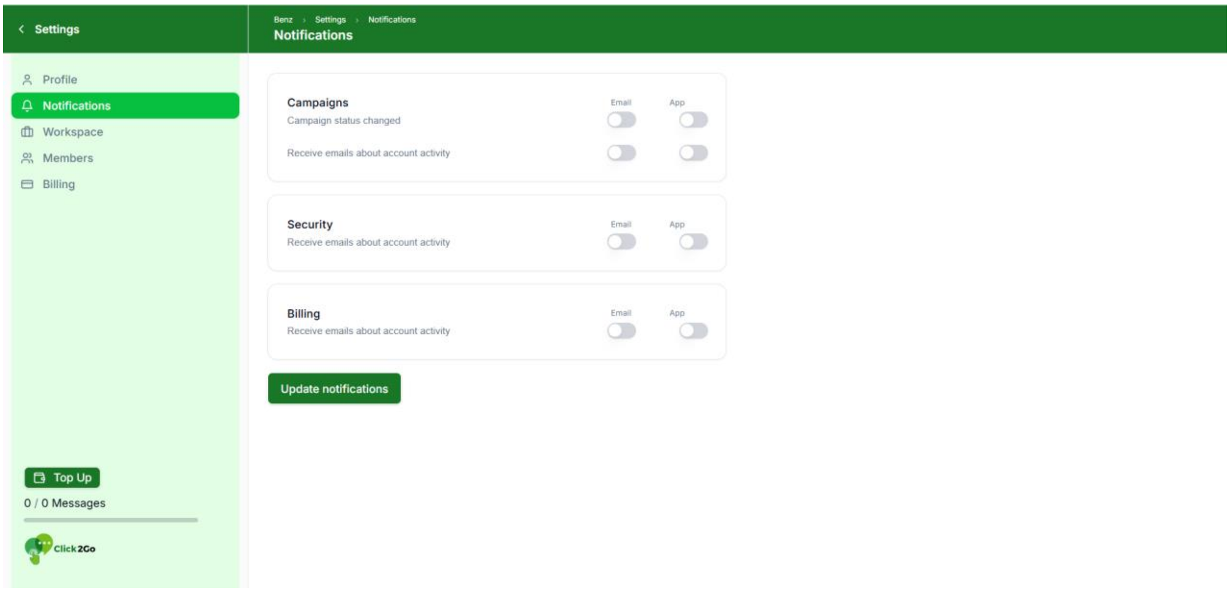
1.7.2.1 NOTIFICATIONS:

Toggle email and app notifications on or off as per your preferences

Campaigns: Status of the campaign on email or app

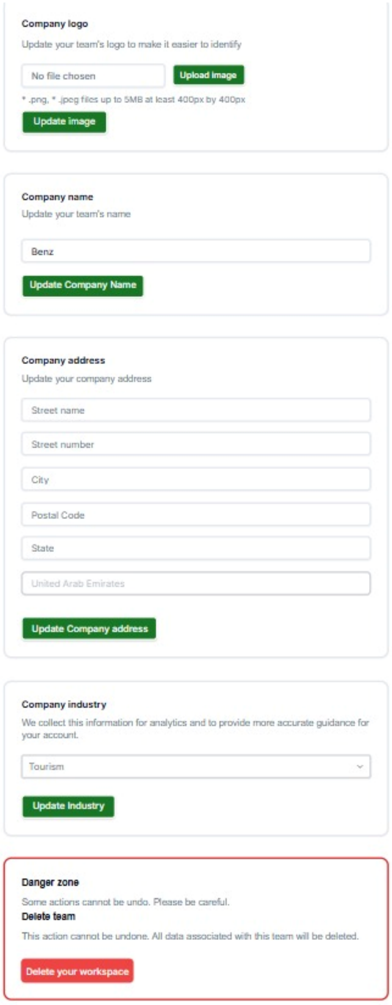
Security: security of account through email or app

Billing: Receive emails about account activity on email or app



1.7.2.2 Workspace Settings for Organisation:

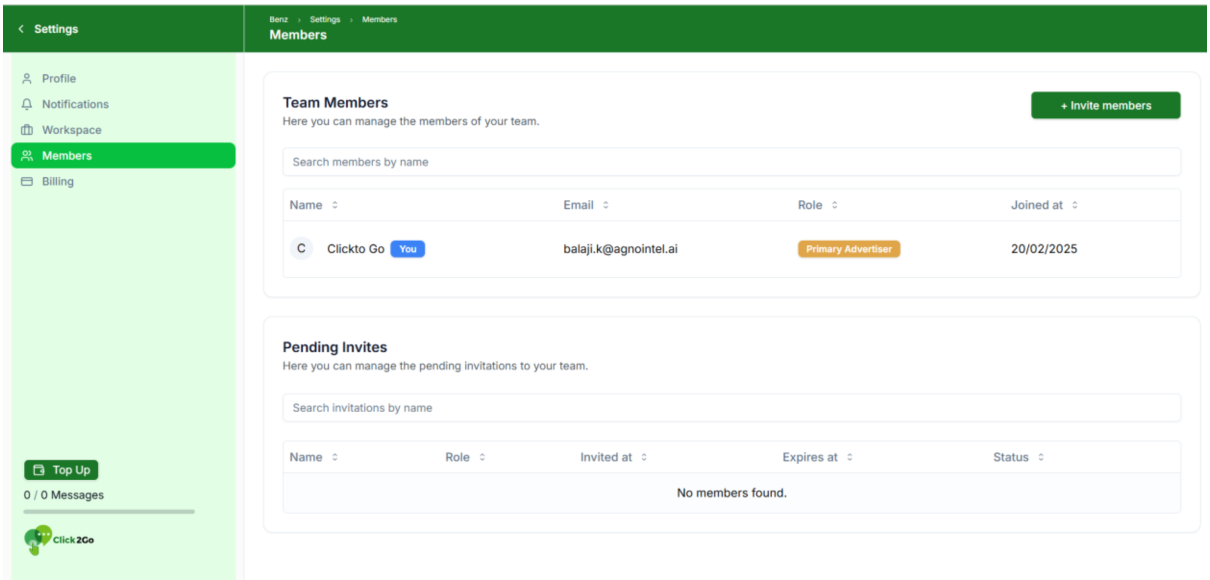
Provide the necessary information to configure the workspace settings.



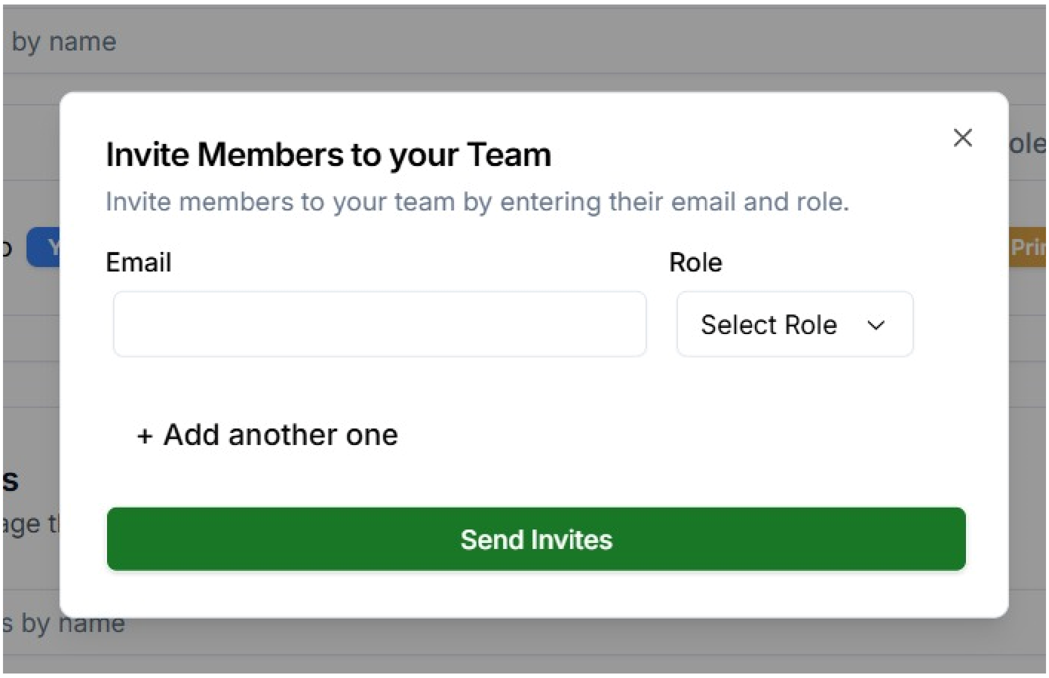
1.7.2.3 MEMBERS:

Step 1: You can invite members to the workspace and manage members of your team

Step 2: The team member who you invited is not accepted ,it will be displayed in Pending invites section



Step 3: You can invite members to your team through Email and role .

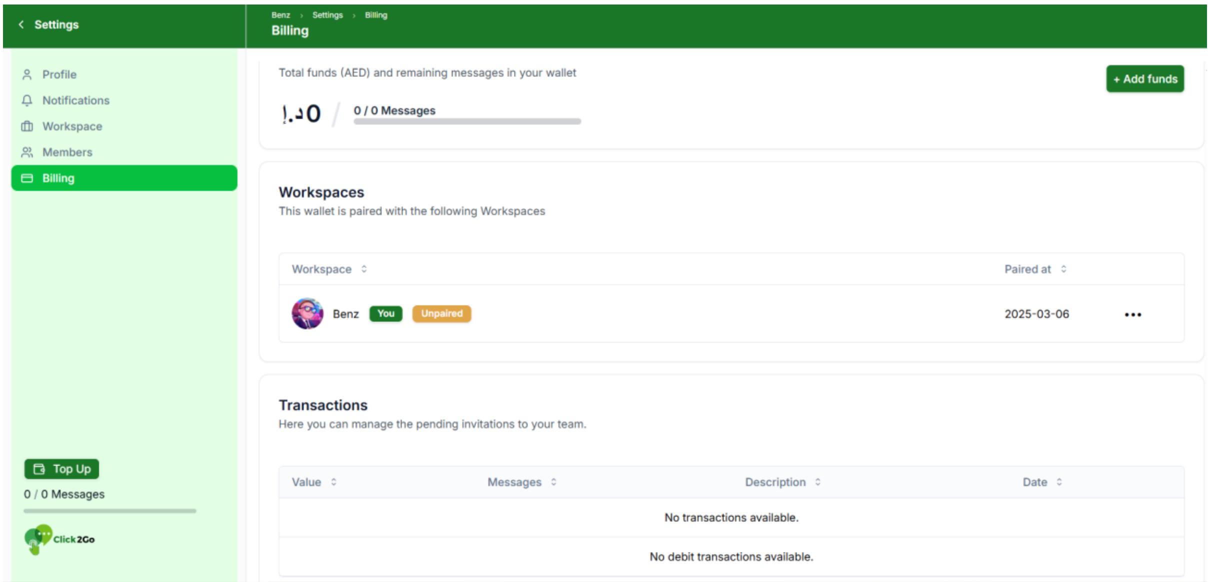


1.7.2.4 BILLINGS:

We can pay for our campaigns through stripe integration

Step 1: Wallet dash will provide as total amount in the wallet based for country selection

Step 2: Advertiser can create various campaign



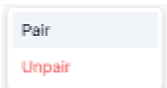
1.7.3 Workspaces :

The workspace action based wallet

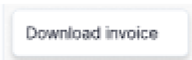
Step 3: There are two options

Step 3.1: Paired-The admin can access amount when it is paired

Step 3.2: Unpaired-The admin cannot access amount when it is unpaired



Step 4 : You can download your payment invoices



1.7.4 Transaction:

Here you can manage your payment activity and plans that you bought to send campaign to the customers

Step 5: You can credit and debit the amount

Value - The amount you spend in credit and debit

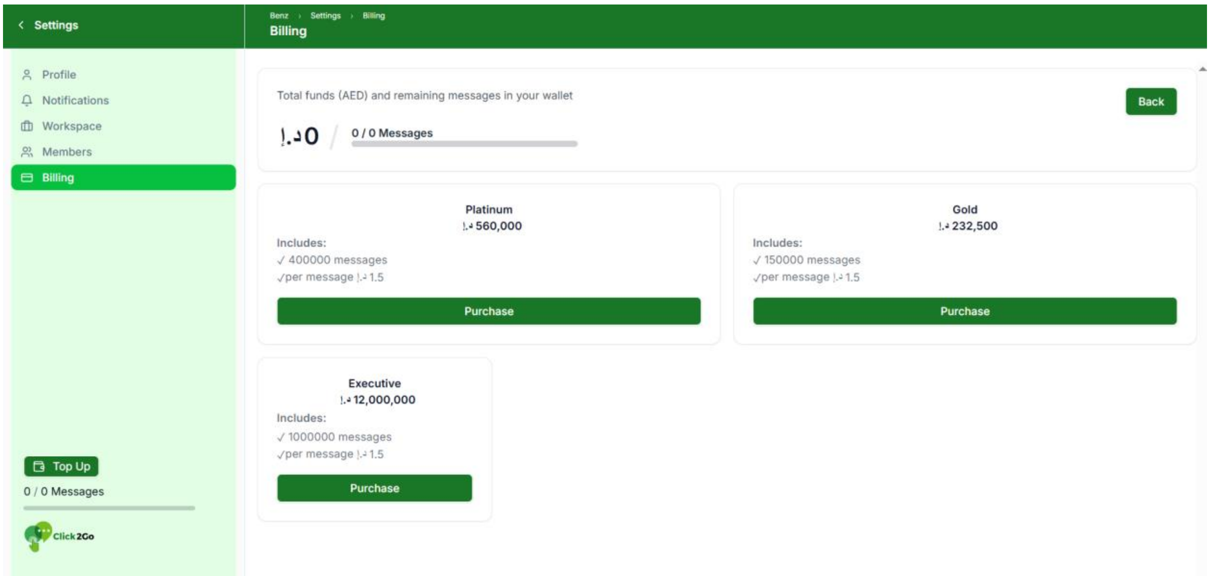
Messages – For how many messages that you have bought that plan

Description – The name of the plans

Date &Time – The date and time of plans that you bought

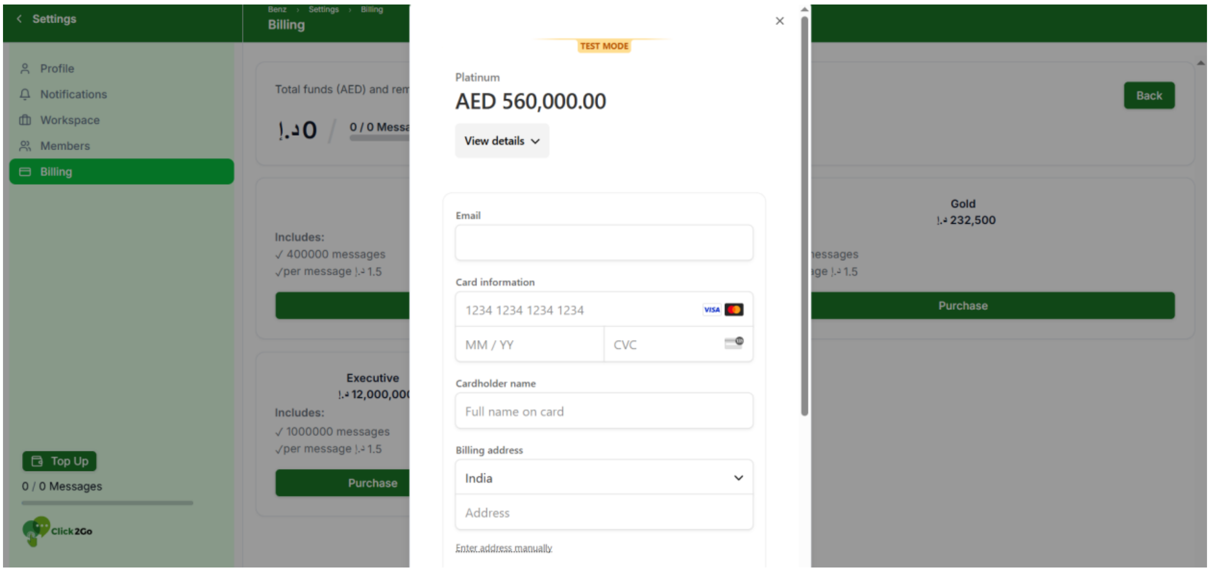
Step 6: Various purchase plan will appear,you can buy based on your choice

Step 7: You can transact the amount based on your purchase plan



Step 8: Click purchase

Step 9: Fill the below details and pay for your campaign



1.7.5 LOGOUT:

Log out option will be there, you can logout from the page.

Click2Go

4. Admin Module:

4.1. Home:

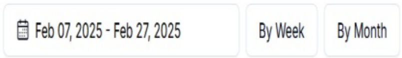
Data Analytics of all the workspaces will be displayed in Home.

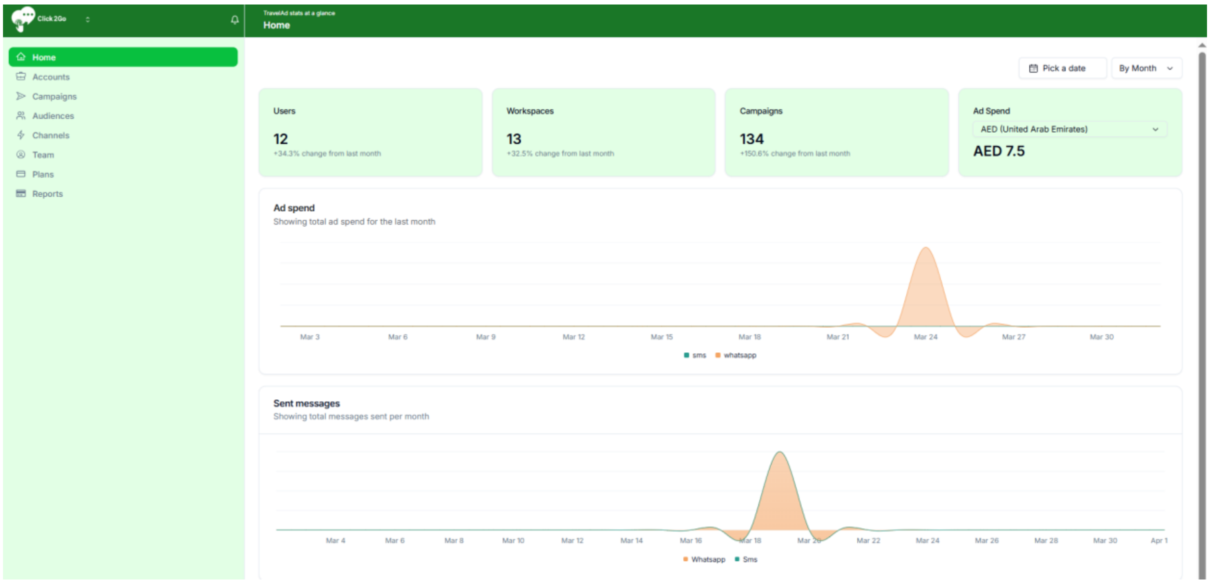
USERS - All the users in Click2Go

WORKSPACES - All the workspaces in Click2Go

CAMPAIGNS - Total Campaign sent to workspace users

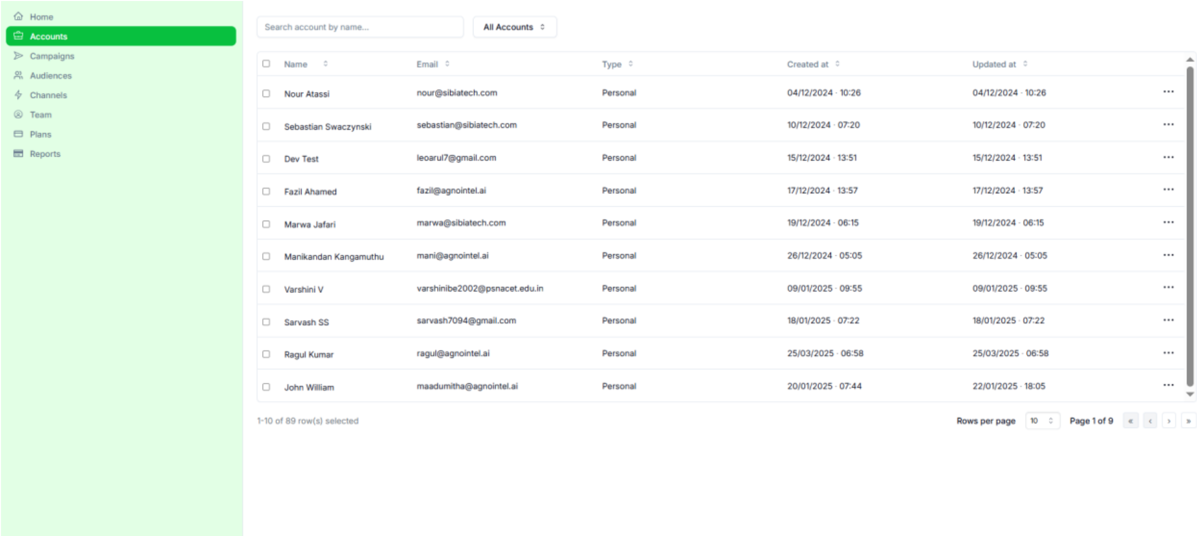
AD SPEND -Amount spend in Ad





4.2. ACCOUNTS:

Manage all account details including personal, Advertiser, Telecom type in Click2Go



Type option provides various selection method such as

- Account selection option will helps us to choice various account based on user

All Accounts
Personal
Advertiser
Telco

- Personal Account editing option

View
Impersonate
Delete Personal Account

- Advertiser Account editing option

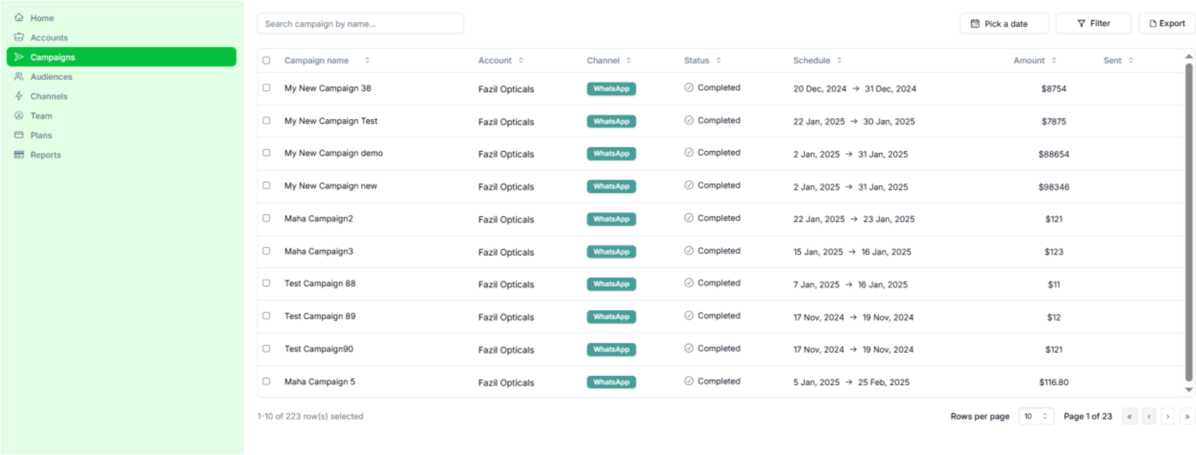
View
Delete Advertiser Account

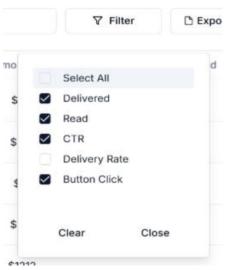
- Telecom Account editing option

View
Delete Telco Account

4.3. CAMPAIGNS:

Campaign page helps us to view all campaign details created in Clic2Go

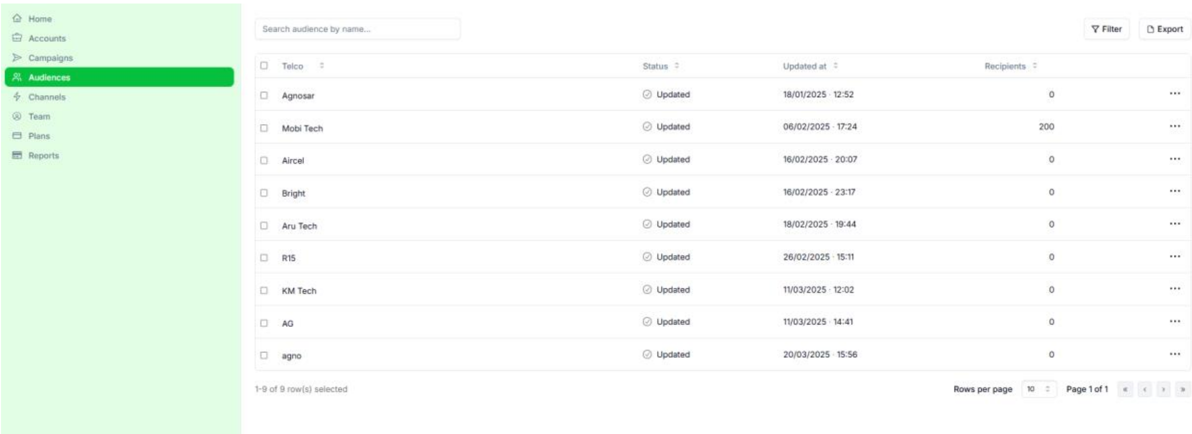




View details of all campaigns, including their status, schedule, and spending.

4.4. AUDIENCES:

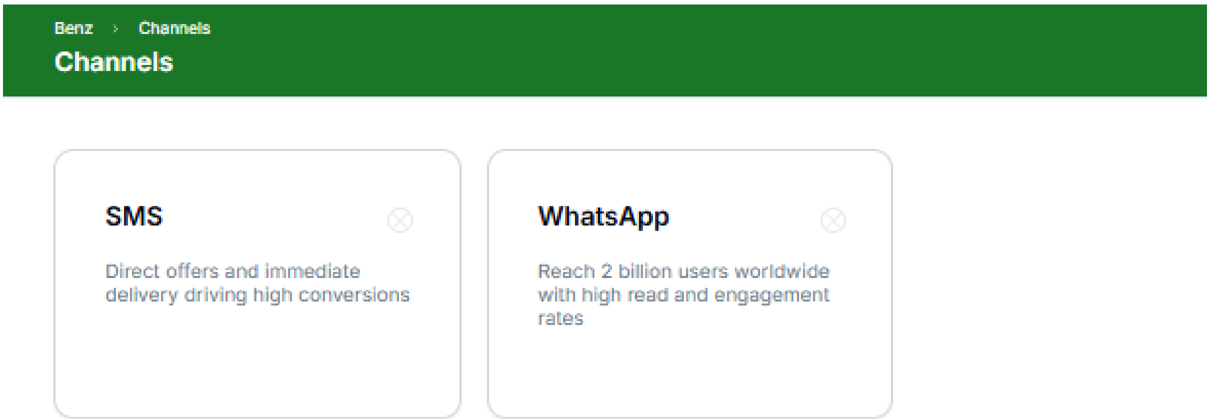
Audiences helps to view all the Audience list of Click2Go



Access a complete list of audience groups with status updates, last modified dates, and recipient details.

4.5. CHANNELS

The admin channel displays the different medium of channels to run campaigns by the advertiser.

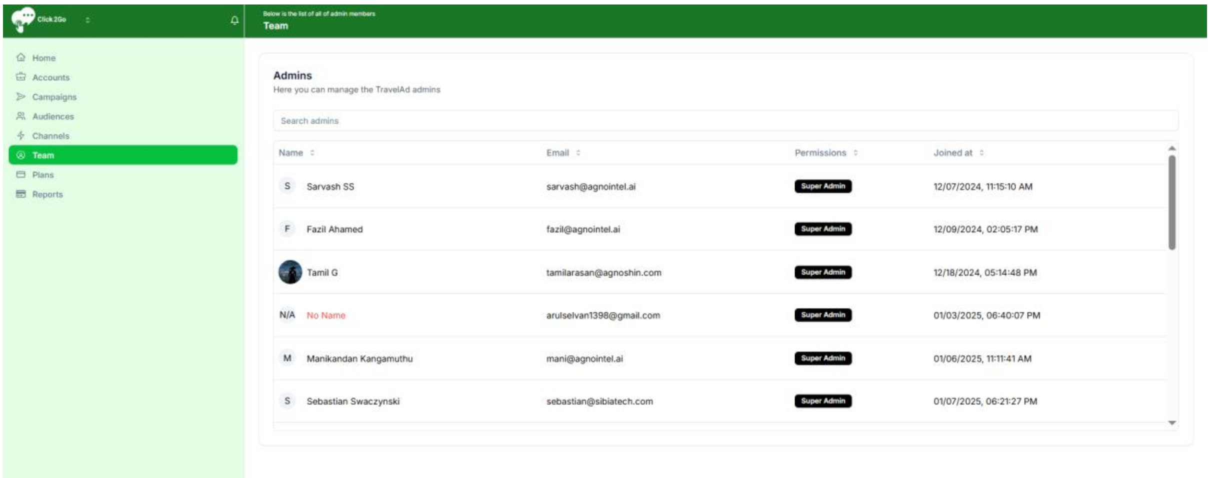


4.6. TEAM:

Now you are in Team page. In this

1. Invite administrators to the workspace.

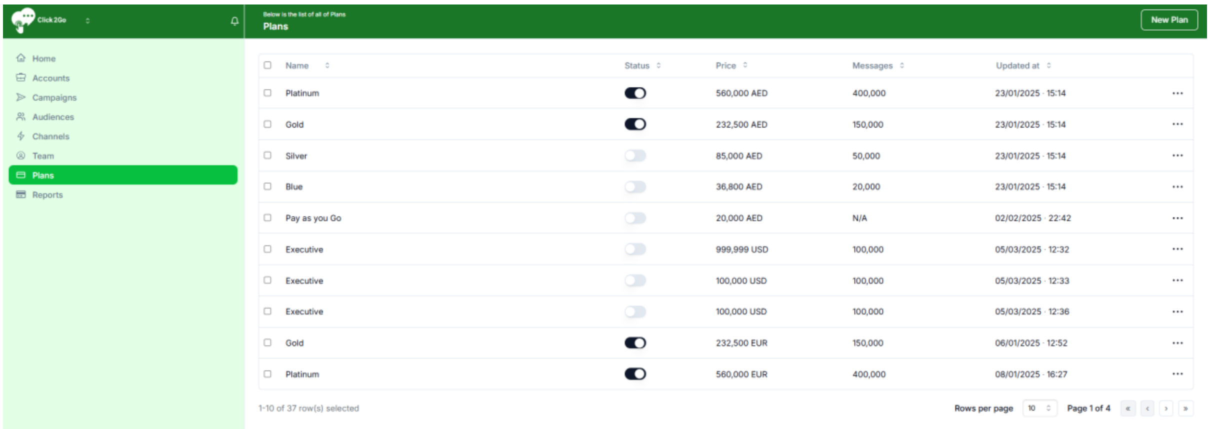
2. You can also check whether the invite is active or else in pending status



3. You can update and remove the invitation by clicking (...)

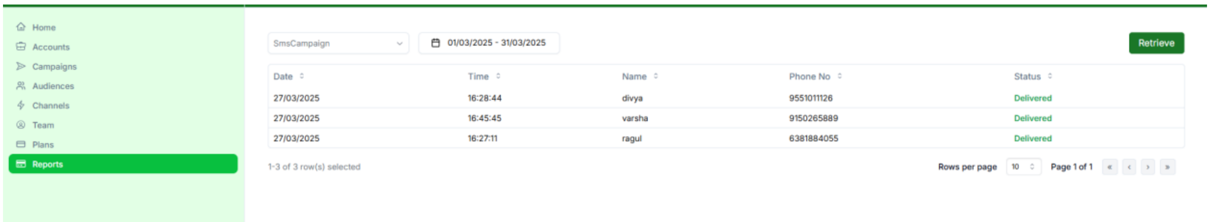
4.7. PLANS:

This page helps you to get the overall analytics of list of plans purchased by the advertiser



4.8. REPORTS:

In the reports page, you can gather all the information about all account details such as



Click2Go

5. Mobile Operator Module

5.1. DASHBOARD:

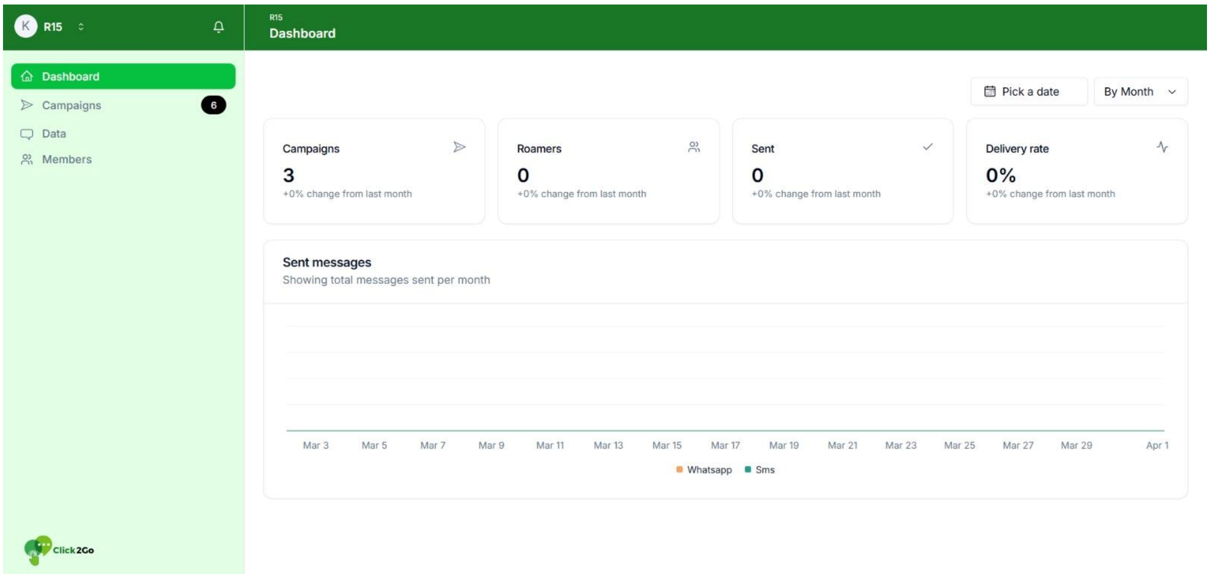
Data Analytics of all the campaigns will be displayed

CAMPAIGNS - Total number of Campaign sent by advertisers

ROAMERS - Total number of roaming contacts

SENT - Total Number of messages sent to roamers

DELIVERY RATE - Total rate of messages sent to roamers



5.2. CAMPAIGNS:

Total number of Campaign sent to the conduct list

Campaign name - Name of your campaign

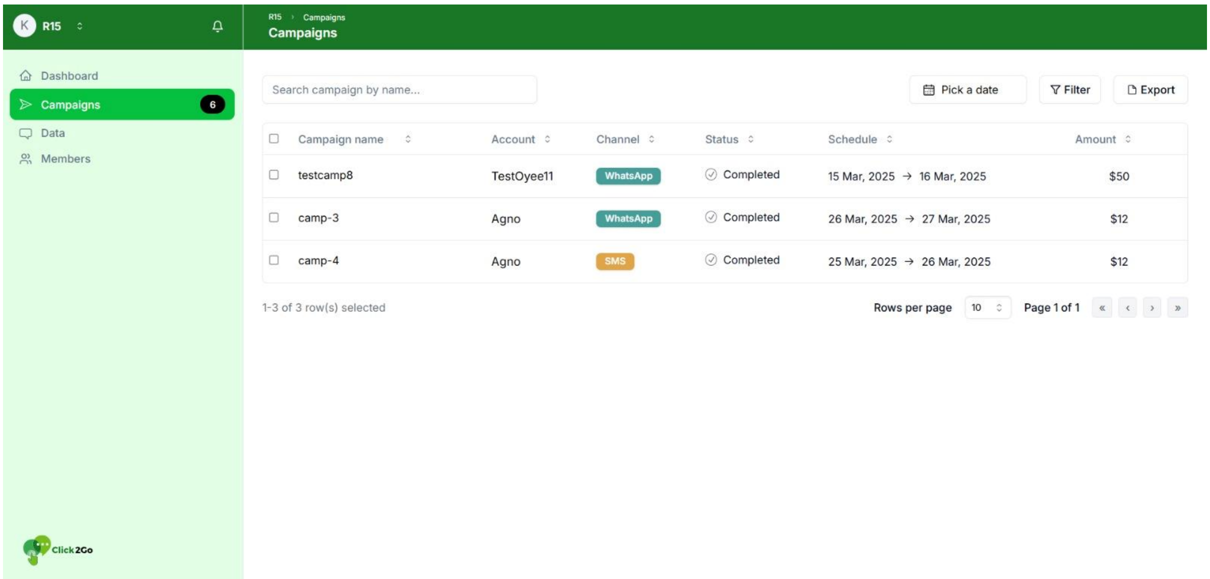
Account - Name of your Account

Channel - Channel you selected to make a campaign

Status - Status of your campaign whether is(In review or Active)

Schedule - The scheduled date to the campaign

Amount - The amount that you spend to the campaign



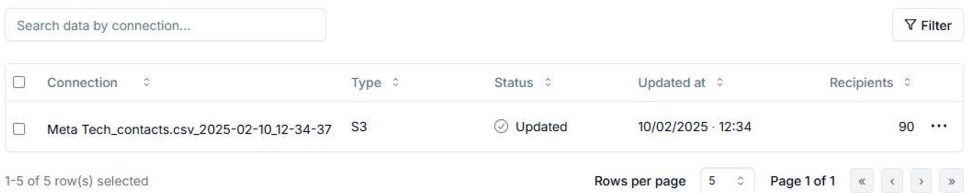
When the campaign is selected ,the campaign details will be displayed

5.3. DATA:

The operator uploads the contact file to the S3 bucket, where it undergoes validation. If the validation is successful, the validated data file is stored in the updated table. If validation fails, the file is stored in the failure table.

The successfully validated file will be displayed in the following format:

- **Connection:** [Successfully validated file name]
- **Type:** S3
- **Status:** Updated file from the S3 bucket
- **Updated at:** [Date and time of file update]
- **Recipients:** Total number of recipients in the updated file

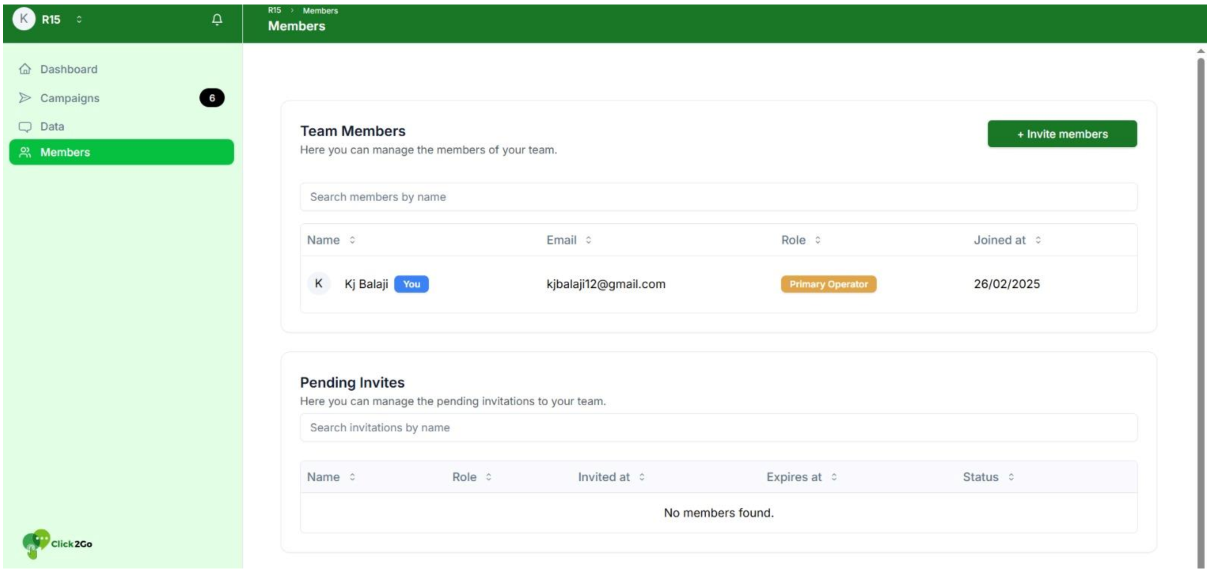


5.4. MEMBERS :

1.You can invite the members to your team and manage them

2. **Primary advertiser** who invite the others is the owner of the workspace.

3.If member did not accept the invitation, then it will be in the **Pending invites** section.



5.5. CALLBACK HISTORY

The page provides a log of personal callback and IVR callback history for tracking and follow-up. Agents can view, filter, and analyze callback records based on key details such as date, time, call type, caller number, call answered time, duration, scheduled callback time, and remarks.

The date range filter is visible in the top-right corner, allows the user to filter callback records for a specific date range.

S No: Serial number of the callback entry.

Date: The date of the callback.

Time: The time the callback was initiated.

Call Answered Time: The exact time the call was answered.

Call Type: Indicates the type of call (e.g., Outbound Manual Dial).

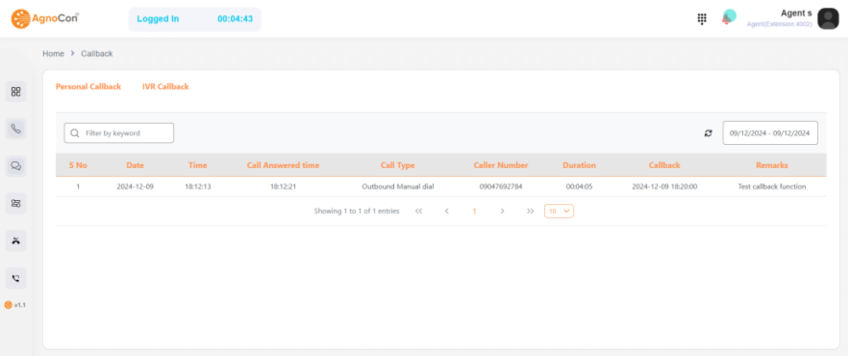
Caller Number: Displays the caller's phone number.

Duration: Shows the call duration.

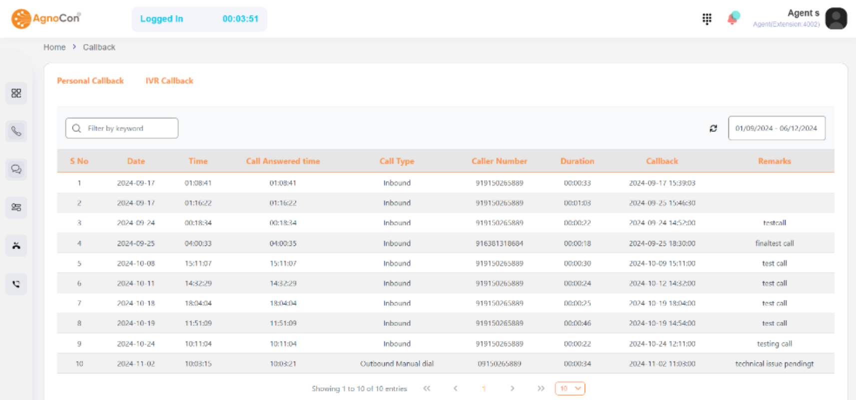
Callback: Specifies the scheduled callback time and date.

Remarks: Additional notes or comments (e.g., "Test callback function").

5.5.1. Personal CallBack



5.5.2. IVR Callback

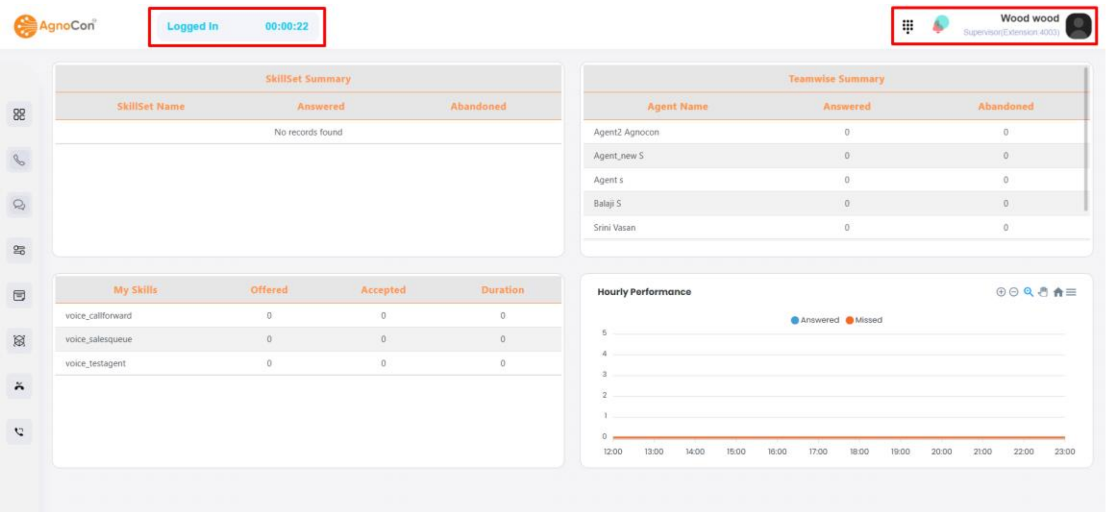


6. Supervisor Module

The supervisor can monitor the overall performance of the contact center, the team, and individual agents. With access to reports and analytics, they can efficiently evaluate performance. Additionally, the supervisor can silently barge into live calls, speaking either with the agent or the customer without the other party being aware.

6.1. GENERAL

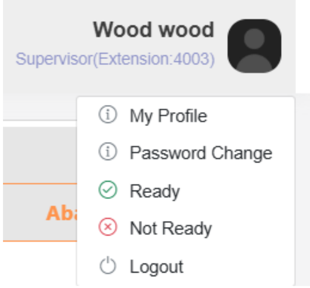
The Highlighted features show the common function in the overall Supervisor Desktop.



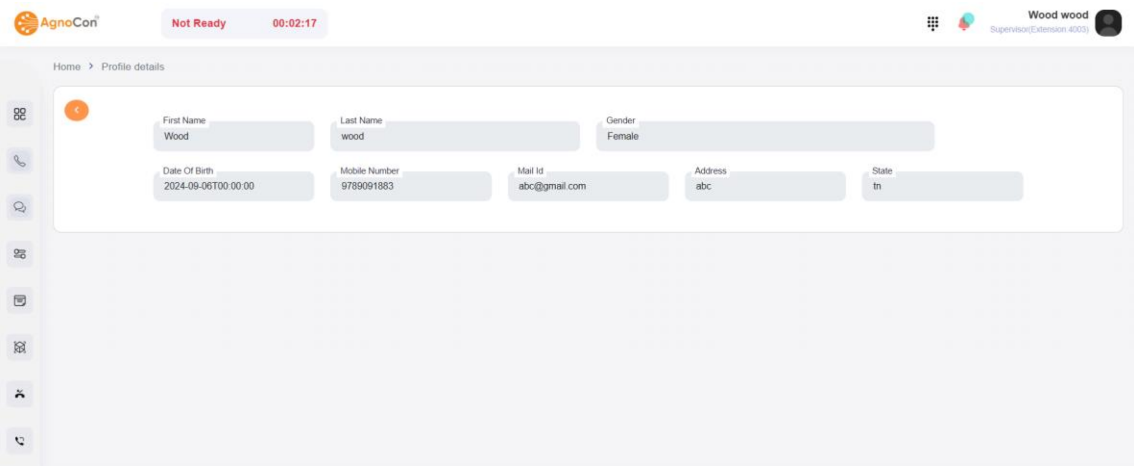
Status – There are 3 status available **Logged In, Ready, Not Ready.** Once the user logs in to the system it will be viewed as Logged In.

Dialpad – Helps the agents to make manual outbound call

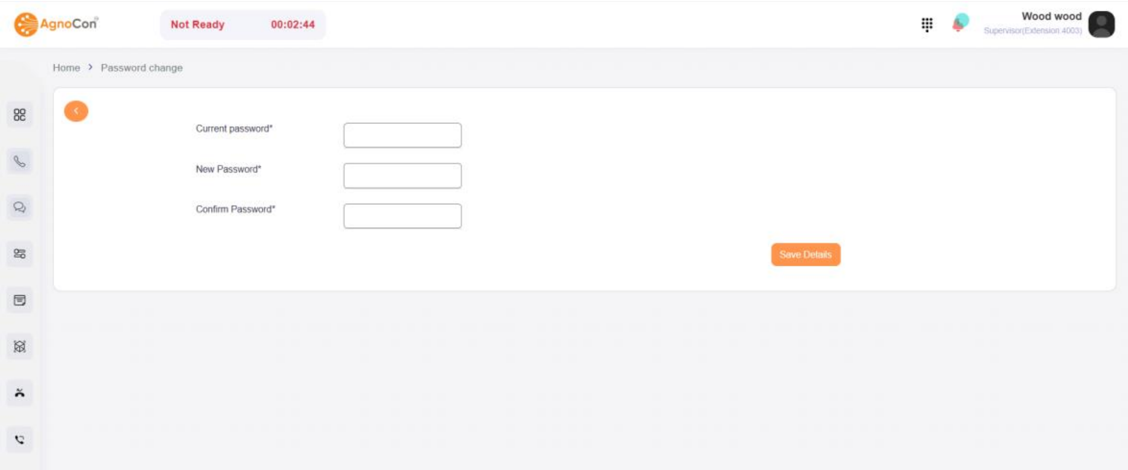
Profile – When we click on the Profile the below features will be listed.



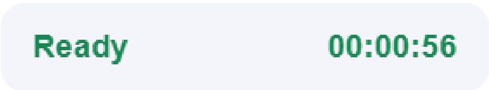
My Profile - The profile details of the user will be viewed here. These are all the details that are collected while creating the user under **Administration> User Management** in Admin Login.



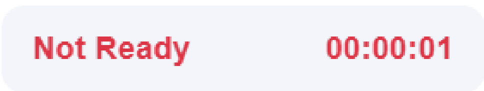
Change Password – By entering the all the fields and clicking the **Save Details** button the password will be changed and reflected when the user logs in again.

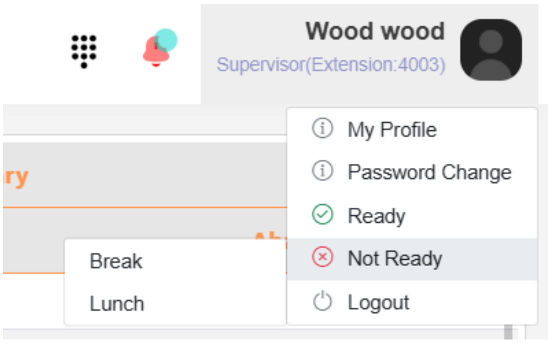


Ready – Clicking on Ready will make the status as Ready



Not Ready - Clicking Not Ready will view the reasons to keep as not ready. And change the status to Not Ready when reason is selected, in our case we have the options **Break, Lunch.**

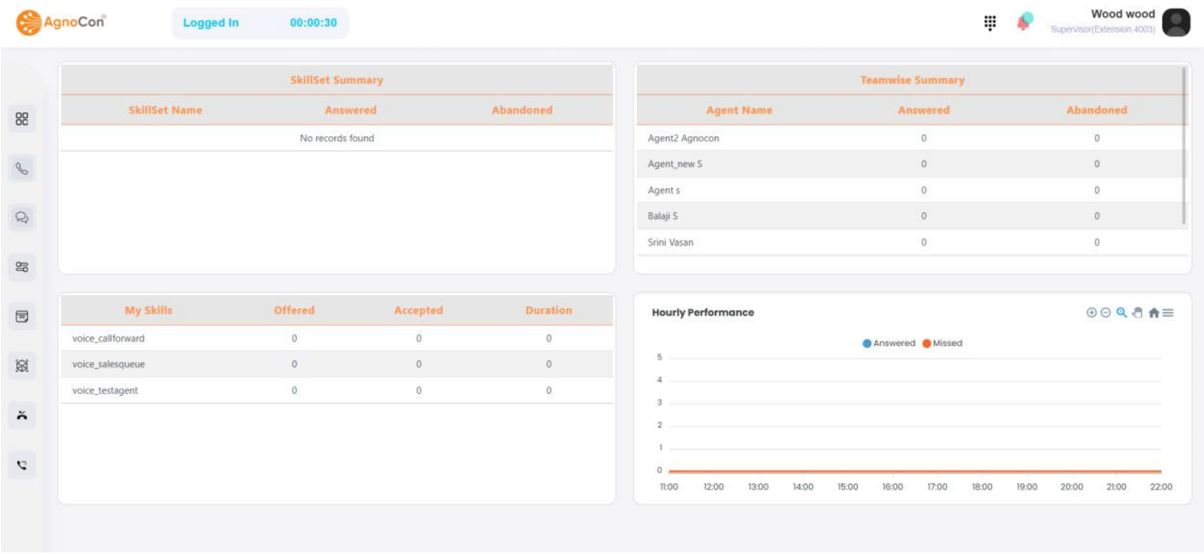




Logout – Clicking on the logout button pops a confirmation message and logs out when given confirm.

6.2. HOME

The dashboard provides a real-time overview of agent and skillset performance metrics, enabling supervisors to monitor activities and performance across the team.

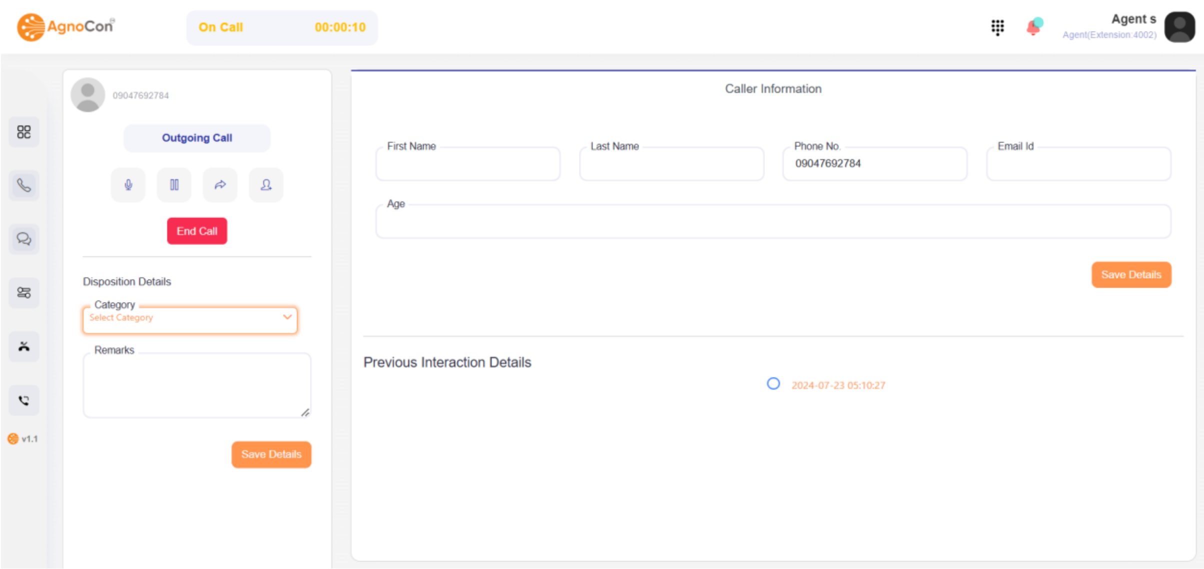


The supervisor can also handle calls.

- **Skillset Summary**
  - SkillSet Name, Answered, Abandoned:
    - This panel summarizes call statistics grouped by different skill sets
- **Teamwise Summary**
  - Agent Name, Answered, Abandoned:
    - Provides a breakdown of performance by agent.
    - Each agent's name is listed (e.g., Agent2 Agnocon, Agent_new S)
- **My Skills**
  - Skills (e.g., voice_callforward, voice_salesqueue):
    - Shows the specific skills assigned to the supervisor
  - **Offered**: Calls for that particular skill.
  - **Accepted**: Calls accepted or handled.
  - **Duration**: Total handling time for that particular skill.
- **Hourly Performance**
  - A real-time performance visualization of answered and missed calls over time.
  - Metrics for the day are plotted with:
    - **Blue Dots:** Representing answered calls.
    - **Orange Dots**: Representing missed calls.

6.3. VOICE INTERACTION

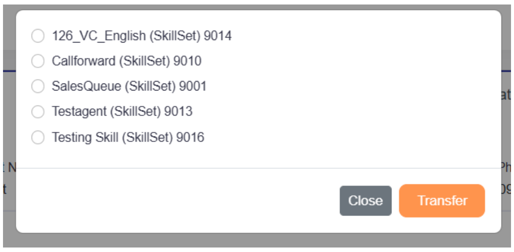
The Voice Interaction interface handles incoming calls and provides essential call control features for contact centers, including tools for processing customer information and after-call tasks. It also supports manual outbound and campaign calls. The interface keeps live calls active, allowing agents to navigate to other sections and return at any time to continue or complete the call.



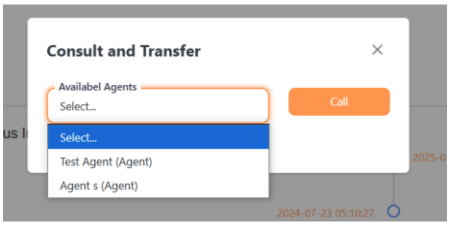
When the agent is on a call,

- If the caller has previously contacted the contact center, the details saved by the previous agent, along with information about the prior interaction, will be displayed in the caller information section. The agent can also edit the details provided by the previous agent.
- If the caller is new, the agent can manually enter the details into the fields.
- The agent can do the following

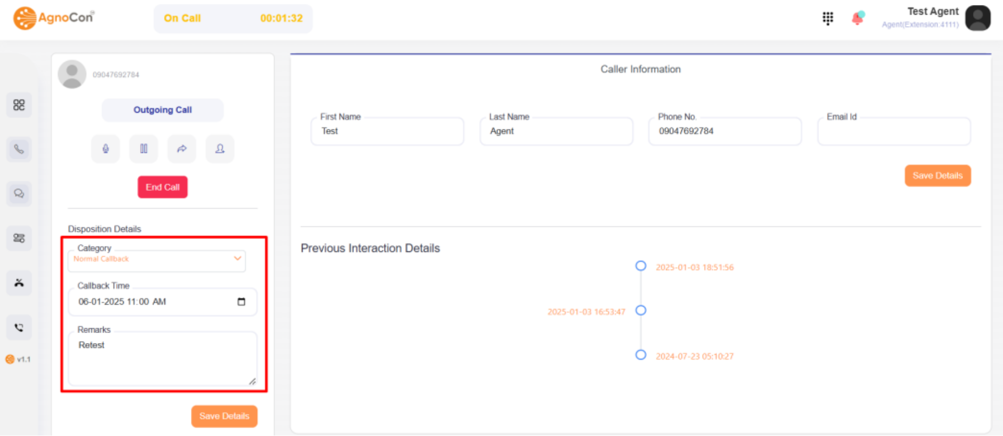
- The agent can mute the call
- The agent can hold the call
- The agent can transfer the call to another Agent, By selecting the skill set to whom the agent wants to transfer



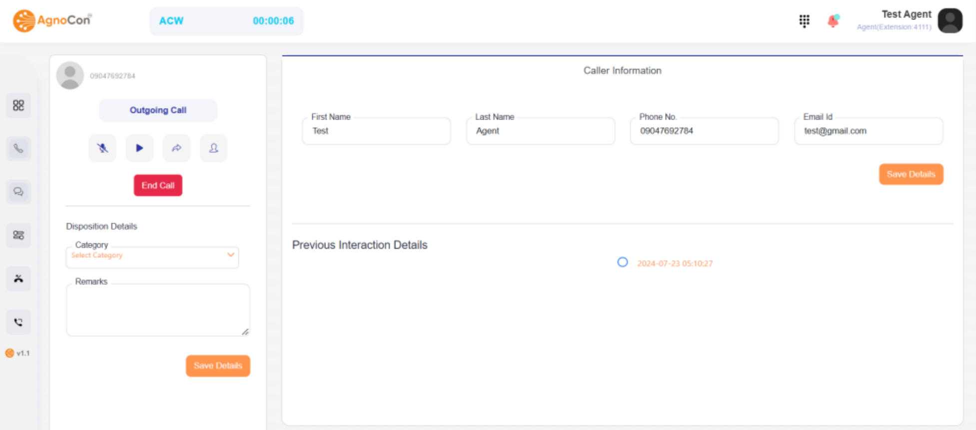
- The agent can consult and transfer the call to another agent or can continue with the call, From the available agents drop down the agent can select to whom they want to consult by selecting and clicking on the call button, Will connect the agent on call to the other agent.



- **Disposition details –** This is also a configuration that is made by the admin, Dispositions added by the admin will be listed in the category field, and the agent can select the disposition based on the category that is related to the call.
    - The agent can also add additional remarks that is related to the call given by the customer or for their reference if needed.
    - This disposition has a call-back feature (This is to be activated from the backend side), we can select the respective date and time requested by the customer in the Callback time field.
    - Only by clicking the save details button, the disposition details will be saved

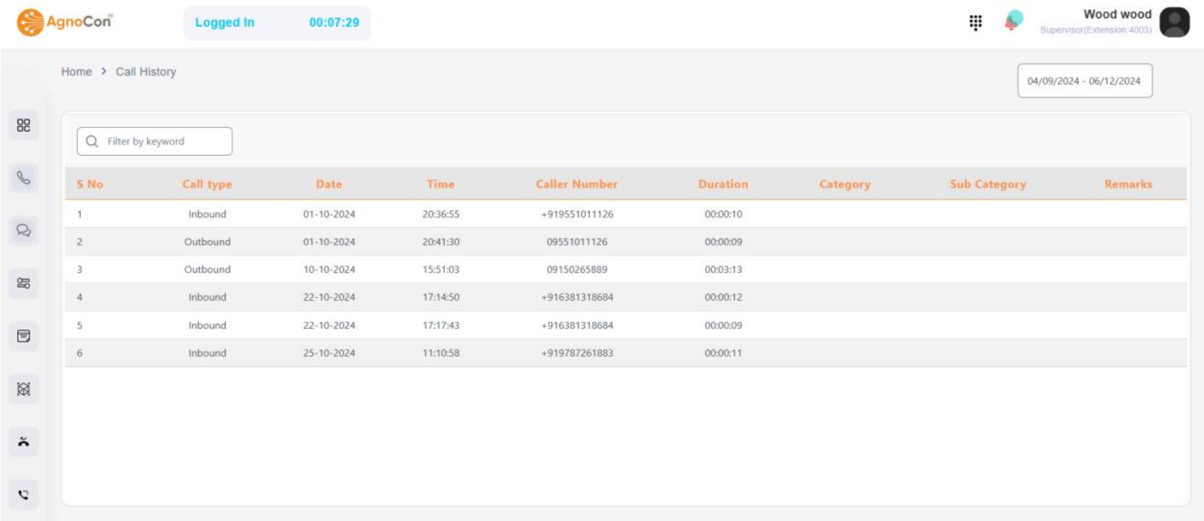


The interaction detail and disposition details can be done while the agent is on a call with the customer Or it can also be done during the ACW state that is when the customer or the agent disconnects the call the agent will be given this ACW duration will be configured by the admin.



6.4. INTERACTION HISTORY

The page provides a log of historical call records for tracking and analysis. Supervisors can view, filter, and analyse calls based on key details such as type, time, duration, and remarks.



By selecting the date range, we can view the call history details of the selected period.

S No: Serial number for reference.

Call Type: Indicates whether the call was Inbound or Outbound.

Date: The date the call occurred (e.g., 01-10-2024).

Time: The time the call was initiated (e.g., 20:36:55).

Caller Number: The customer's phone number (e.g., +919551011126).

Duration: The call duration in HH:MM:SS (e.g., 00:00:10).

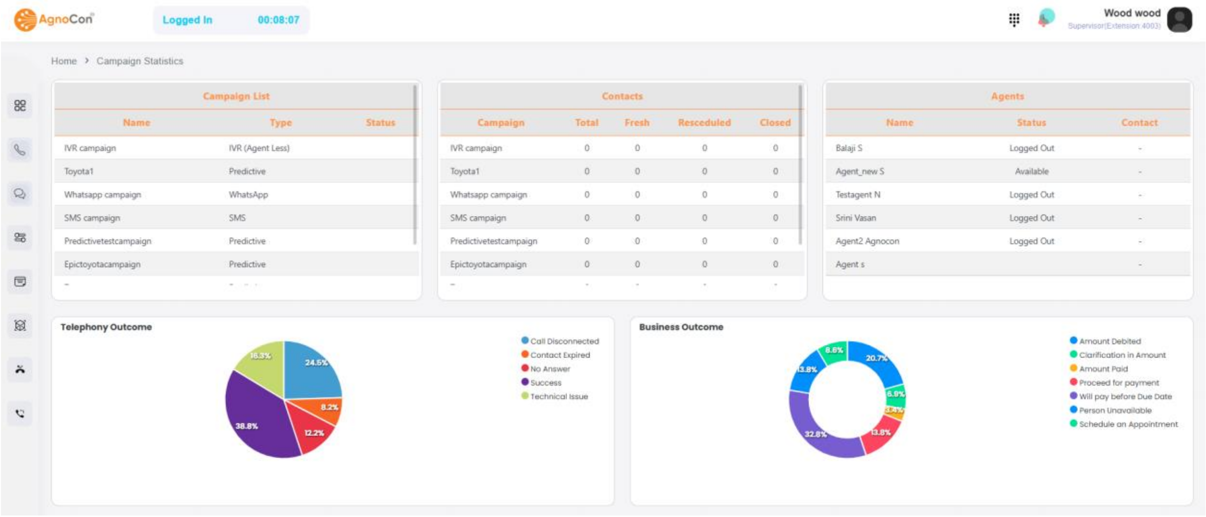
Category: Classifies the call (e.g., Sales, Support, etc.)

Sub Category: A more specific breakdown of the category.

Remarks: Additional notes or comments about the call.

6.5. CAMPAIGN REPORT

The dashboard provides a high-level overview of campaign performance, contact statistics, agent availability, and outcomes.



❖ **Campaign List Table:**
   - This section lists the Campaigns that are available and its type

❖ **Contacts:**
   - Displays contact-related metrics for each campaign.

❖ **Agents:**
   - Shows agent details, including names and their statuses

❖ **Telephony Outcome:**

The chart visualizes the outcomes of telephony interactions for the campaigns, breaking down call-related results into specific categories.

- Call Disconnected
- Contact Expired
- Success
- Technical Issue
- No Answer

❖ **Business Outcome:**

The chart shows the business impact, giving insights into customer actions and resolutions. Each segment represents a specific type of customer response or outcome.

- Amount Debited
- Clarification in Amount
- Amount Paid
- Proceed for Payment
- Will Pay Before Due Date
- Person Unavailable
- Schedule an Appointment

6.6. CALLBACK HISTORY

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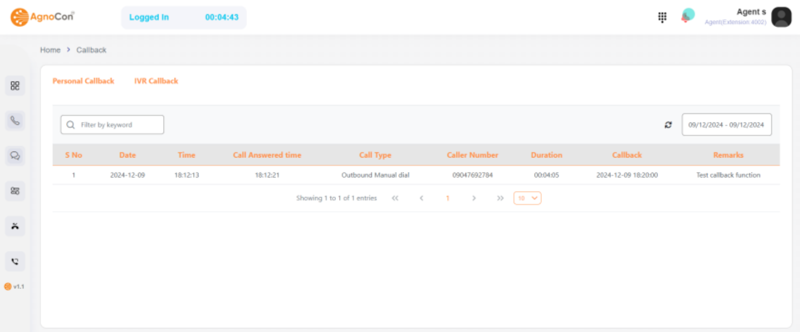
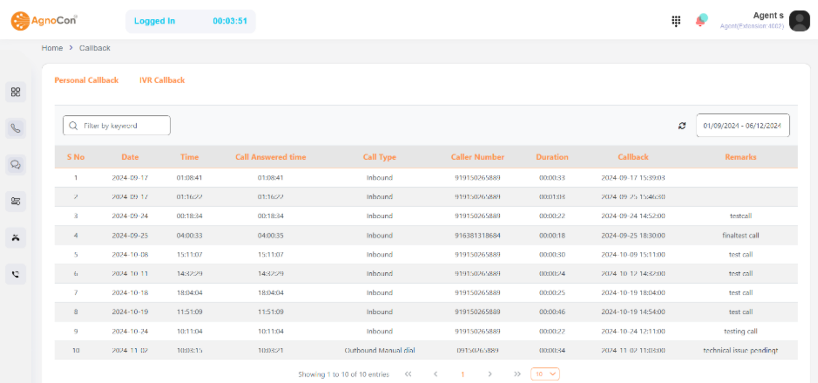
6.6.1. Personal CallBack



6.6.2. IVR Callback



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