CM.com

Customer Contact User Guide

CM.com
August 2019
V1.3

Content:

General

This implementation guide will explain how to install CM.com's customer service application. Purpose of this application is to support your customer service team in providing support.

Customer care employees take phone calls, answer chats, have a window open for customer questions via WhatsApp, another one for requests coming in via Facebook Messenger, another for Telegram, and so on. In the meantime, they are typing their notes in a CRM system and try to answer each chat as complete and quick as possible. Quite the challenge.

Our customer contact solution makes their lives much easier, since these processes are combined in one interface, decreasing the time spent to help each customer. And thus to boost customer satisfaction.

From one single customer care window, you can combine different messaging channels like SMS, Viber, WhatsApp, Telegram, Twitter, Facebook Messenger, Apple Business Chat, Email and Voice. More channels are made available continuously, as the world of messaging keeps changing. Still, the implementation on your end is effortless. The Customer Contact dashboard creates order in the overload of communication channels, saves valuable time from your employees and increases your NPS.

Rather integrate all channels through an API

You already have software implemented and want to integrate all channels through an API? No problem. Connect your software to our Business Messaging API or use one of our plugins. We offer a large selection of channels and you can access them all connecting to only one API. Have a look at our API documentation or visit our Multi-Channel Messaging page for more information.

Need Support?

The CM.com Support team is there to help you. Should you have any questions or need clarification, please contact CM.com on +31 (0)76 752 7000 or via support@cm.nl.

Our CM support team also makes use of our own customer contact application, hence you can also reach them via Viber, WhatsApp, or Facebook Messenger.

Complementary products

Complementary products you might want to check out:

- Get campaign information into your Customer Contact application. Many find this feature useful to stay informed about which marketing/notifications have been sent out. MT-Webhook.

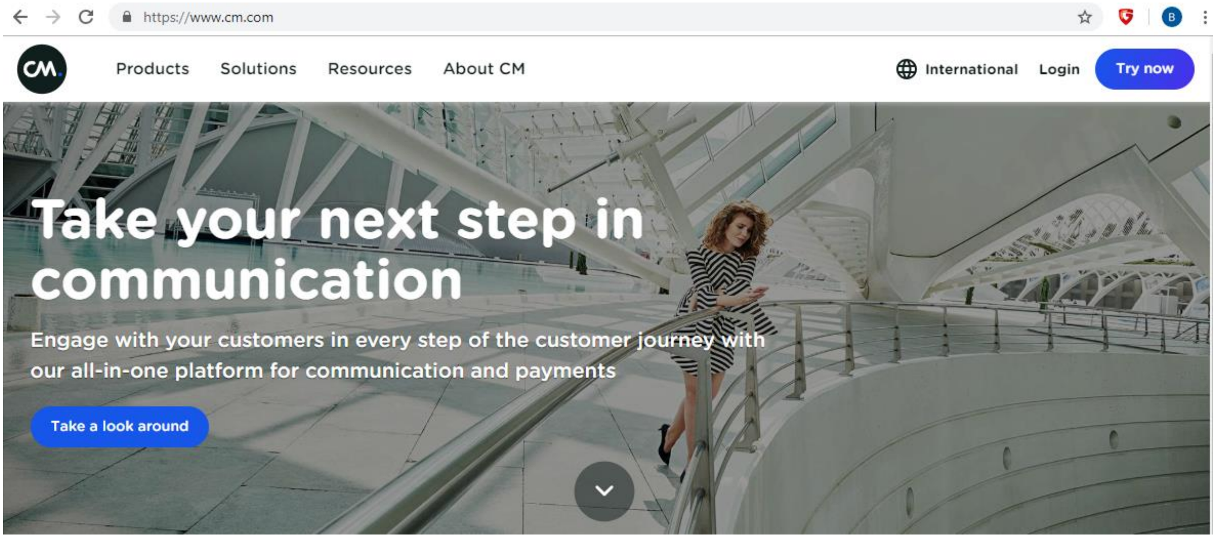
- CM.Campaigns helps you send out messages to one or more users, without them reaching out to you first. This helps you send them notifications, marketing message or to information about your newest items, campaigns etc.

- Is the implementation of messaging such a success that you need help of a chatbot, please contact our support team via: conversational@cm.com

Get started

Access to the application:

Please Register to our platform. Do you already have a CM.com account already, then Log in.



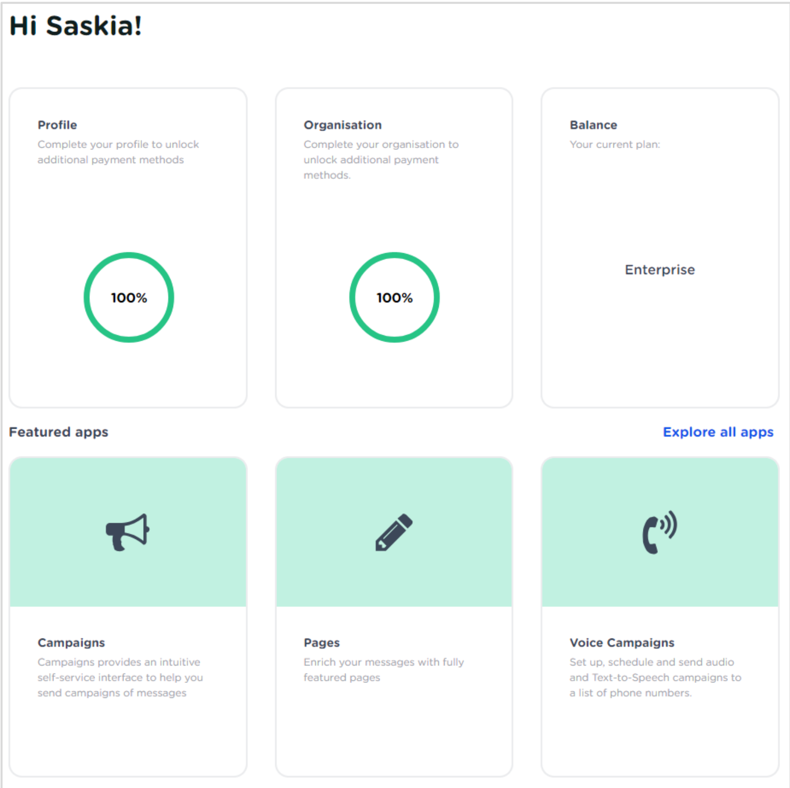
Basic Navigation

On the top of each CM.com application, you will find the same header. This header helps you navigate through our platform and all its applications.

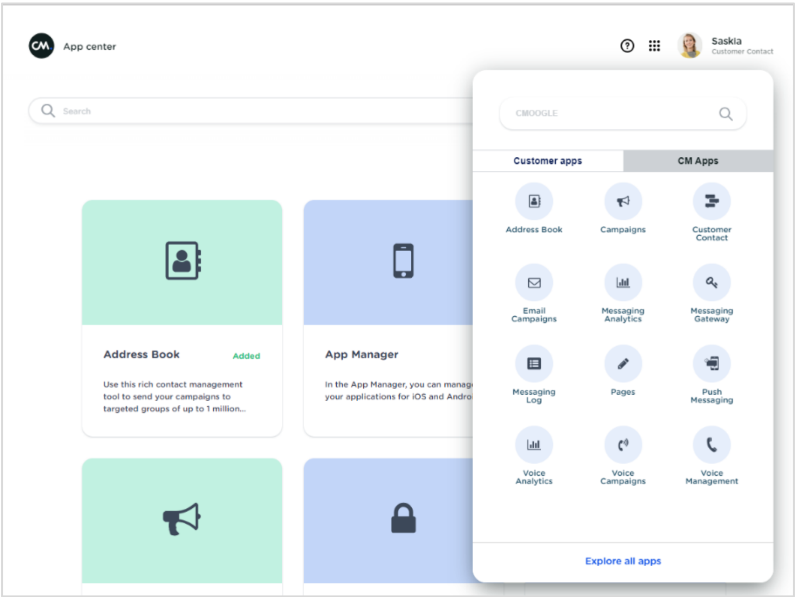
The ⓘ sign navigates you to the Help Center.

The ⠿ sign brings you to all applications you have installed. When you are looking for complementary products to add, you can find those here.

Via your profile / image sign you can always find your organisation's profile. It helps you navigate through information linked to your organisation like your financials and core settings.



You can find pre-selected apps in this overview.



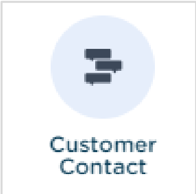
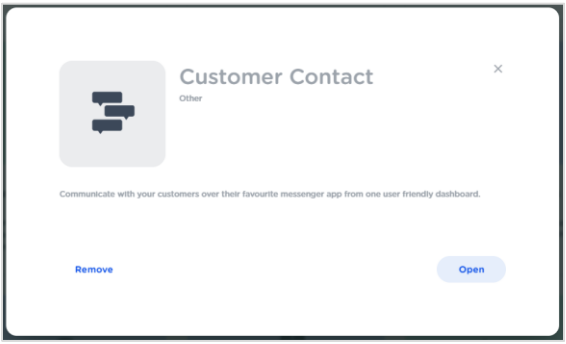
When you cannot find the application you are looking for:

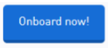
Click on the icon.

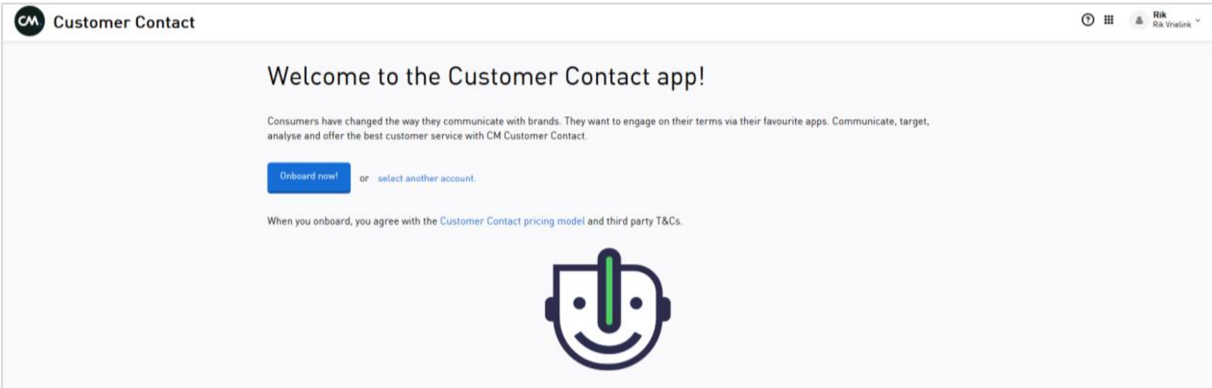
And/Or

Click on “Explore all apps”

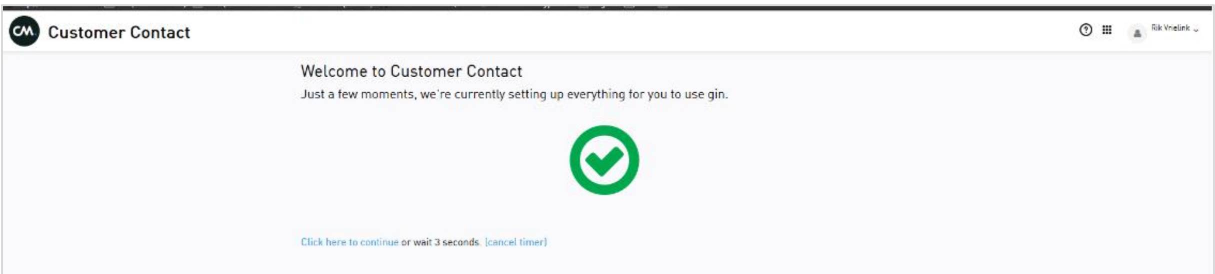
Now search for the Customer Contact application.

	Icon of the customer contact application		From here, you can open the application. It will be added to your account if that was not yet the case.

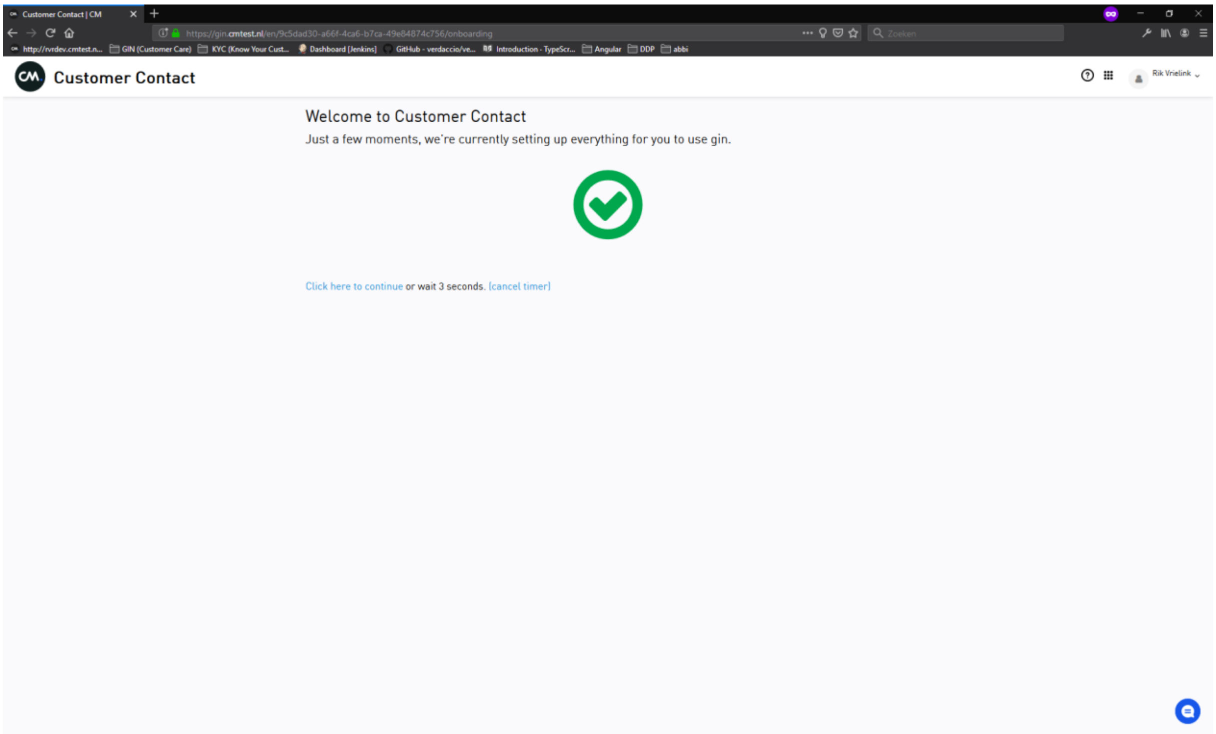
When you are the first employee of your organization, accessing Customer Contact you need to activate the installation and set-up of the system to your organizations profile. This remains in the cloud, we don't install systems on your PC. You do this by just clicking on the blue button 



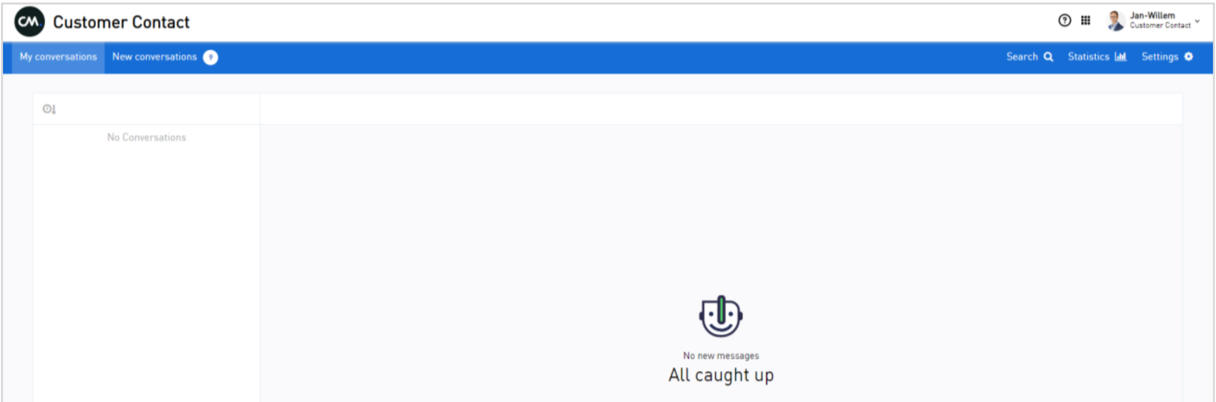
Once the system has completed the set-up you can continue.



When we have not been successful creating the account for you. We will inform you what took place, and how to proceed.



Once you open the Customer Contact application, the landing page will contain all open chats.. When you are new to the application, this will most likely be blank, as shown below.



To explain how the system works, we have an example.

Example Scenario; CM Airlines

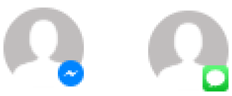
You work for a travel agency. Your customers make use of various communication channels, including SMS, WhatsApp and Viber. All support requests from those chat-apps are shown in one dashboard in your customer contact application. Now, you only have to worry about helping the customer with the right answers, and will thus always reach them in their preferred communication channel.

How do users find you?

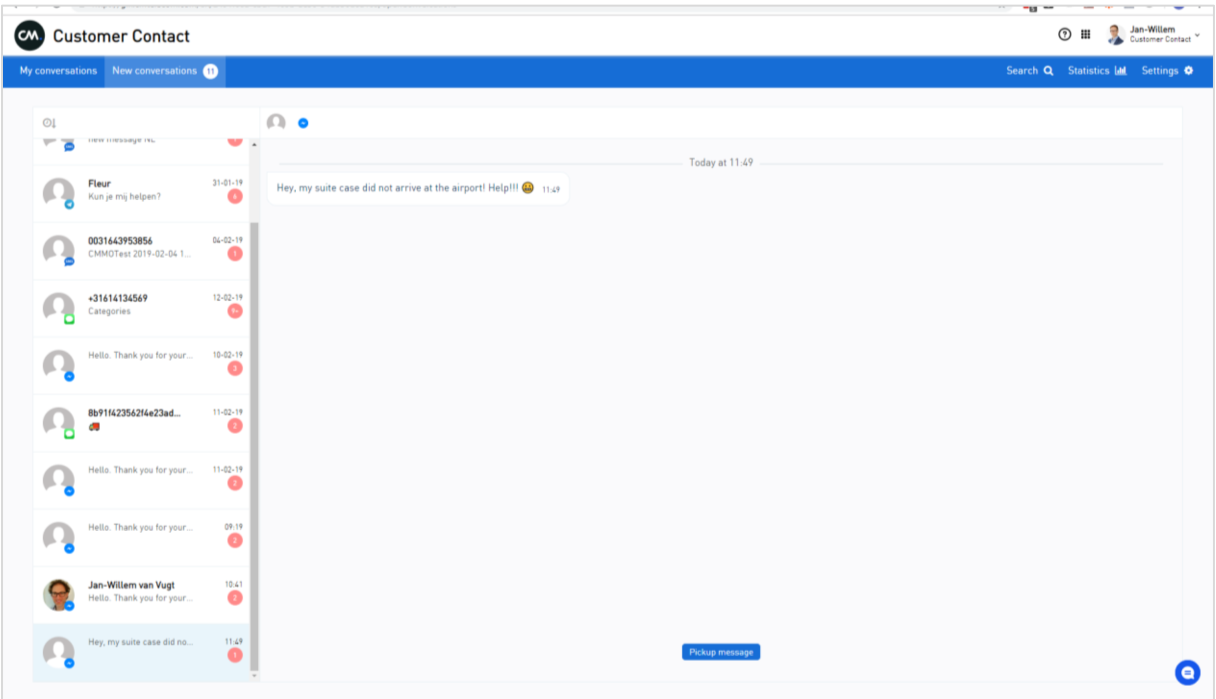
How a conversation starts depends on where you have informed users about How to contact them. They might search for your name on the Web and find a phone number, QR Code or link to a Chat App. Or via documents you have shared with them, a booking confirmation per email, a notification via SMS or Whatsapp, or a ticket which has been shared via Viber.

Conversation starts via their preferred chat-app. In this example we use WhatsApp. Once the user clicks on WhatsApp, the conversation opens and they recognise your company information – which improves the level of trust consumers have in your company.

Your conversation inbox



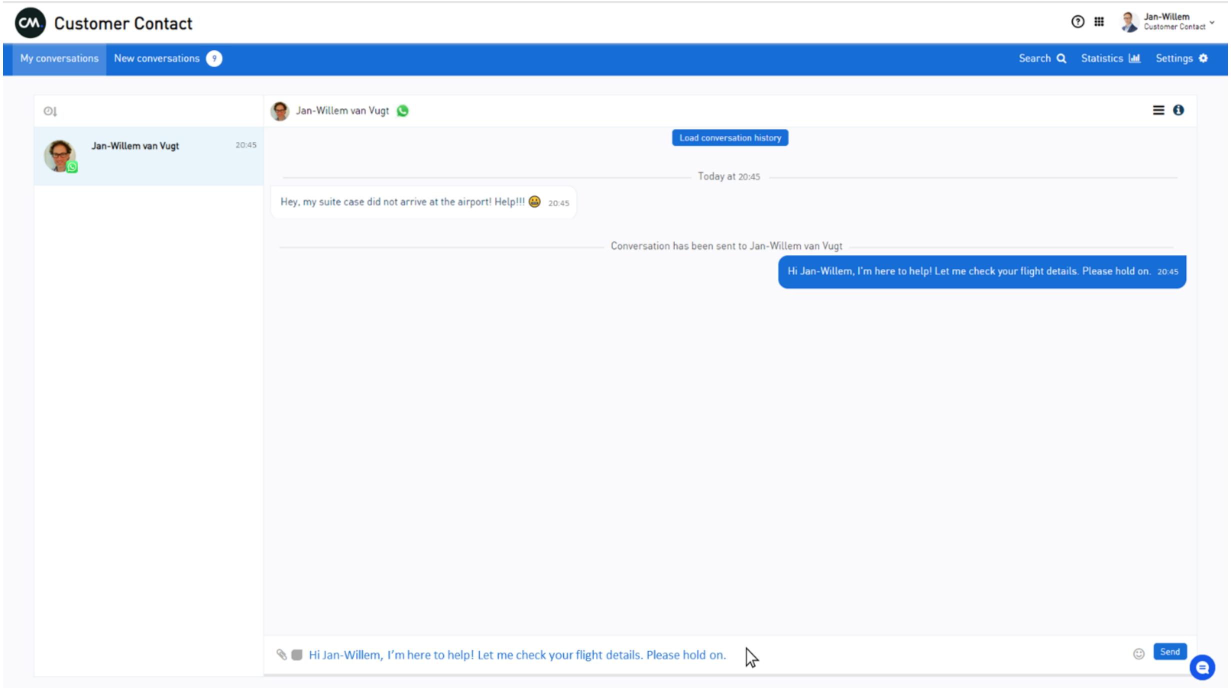
This new conversation is send to your your portal. Here, you can see what service requests are coming in. Via the small icon you can see the communication method your customer is using. Other than 'nice to know' you have no action for this.



In the first queue, the conversation is not assigned to you or any of your colleagues. It is in the bucket with "New Conversations". We sort the conversations based on the time they were received by the system, and the oldest are on top. When you want to help this customer, you click on "pick up message" and this conversation will be yours. It will automatically disappear from the list where you and all your colleagues could see it, and it will be added to your personal bucket with conversations.

Summary:

You share an inbox with all conversations, once you have picked up a message it is assigned to just you and no longer visible in the dashboard of your coworkers.



You now own this conversation, and obviously your customer would like to get your support. Via the lower area of the screen you can type and send your reply. You can send your response either via clicking on “Send” or pressing “Enter”. Automatically the system will send this message back via the communication channel your customer has initiated the conversation in.

Quick replies

Usually your first answer is the similar, and that you want to set certain replies to questions. Therefor we have set Quick replies. Later on we will explain you how to add/alter the quick replies. Those responses are not determined by the system, they still need your interpretation and selection.

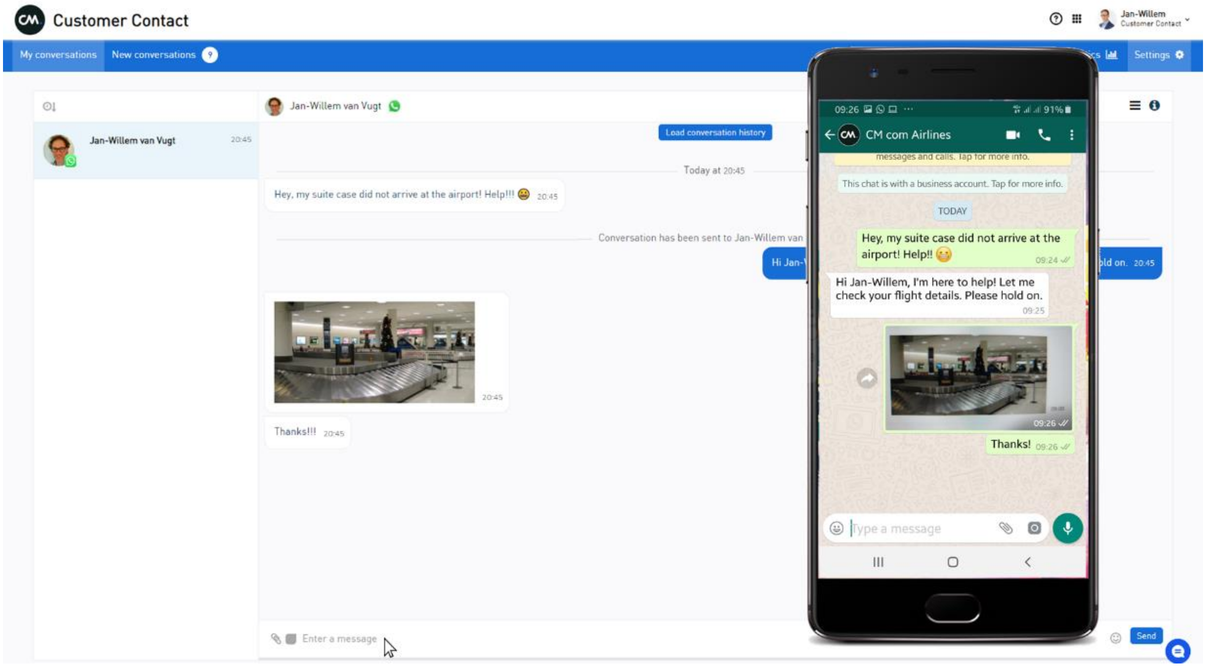
Is the implementation of messaging such a success that you need help of a chatbot, please contact our support team via: conversational@cm.com

More than text

When you want / need to make use of images, this is also possible.

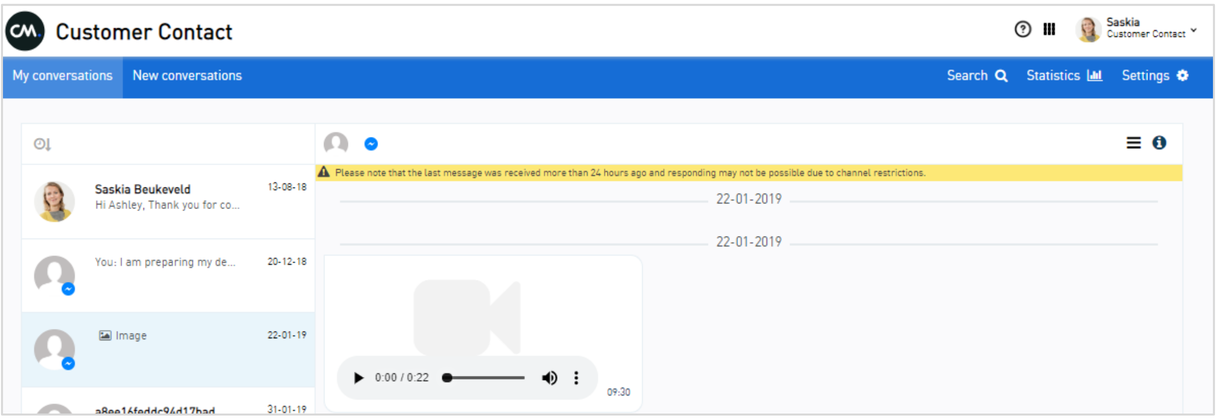
When you want to send images, documents or contact information you can do this via the Paperclip icon.

Not all communication channels support receipt/submission of all file types. We will inform you upfront what will work, and what not. Avoiding you will send information no-one can receive/view.



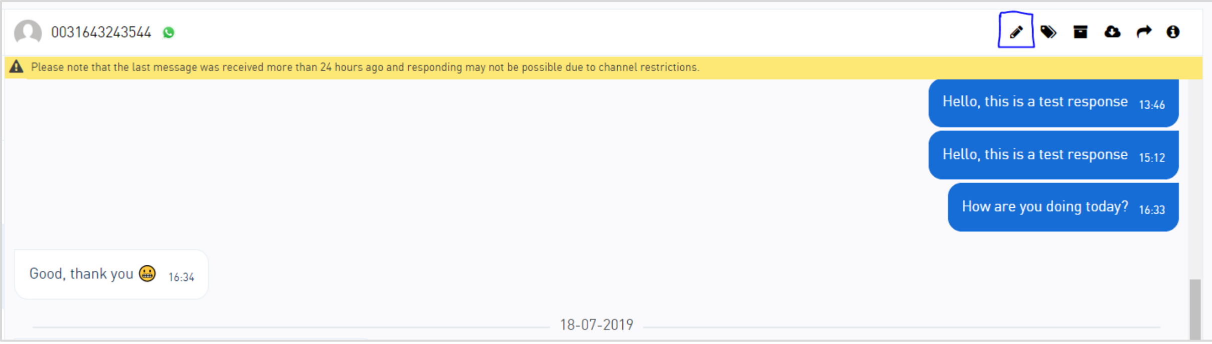
Conversation window

Each chat app has different rules about your response time to your customers. These rules ensure that you deliver high service levels using their platform. WhatsApp, for example, dictates that you have to reach out to consumers within 24 hours after they contact you. This is calculated from the *last* message the consumer has sent. When this window is exceeded, you can only respond with message templates. Those are higher of charge and have a fixed content. More information about those rules can be found in the Help Center and specific chat app documentation.



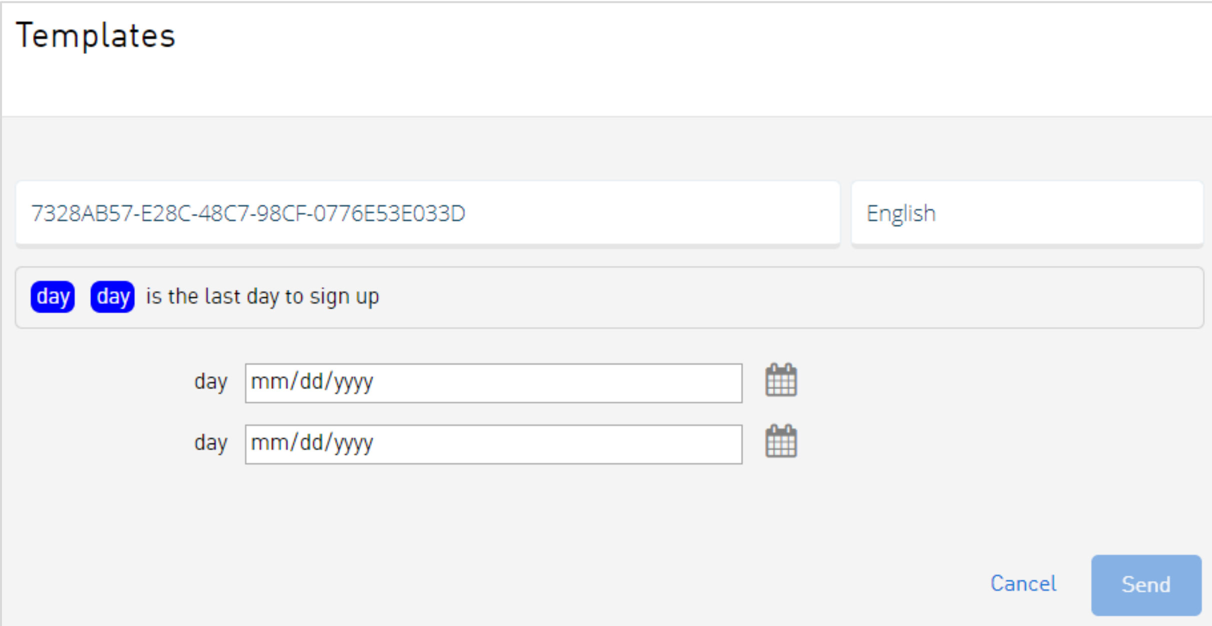
WhatsApp Templates

When you have received messages via WhatsApp, and the conversational window closed, you can only contact your customer via an approved template message. Those messages have been registered by someone in your organization via the CM.com Channels application, and have been approved by WhatsApp. You can see which messages you can send when you click on the Pencil icon.

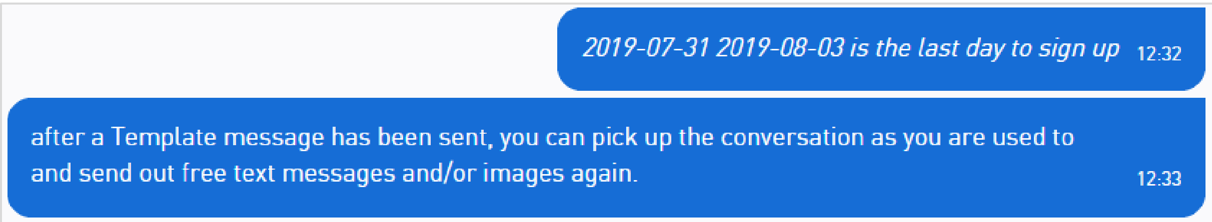


A pop-up will appear in which you can find, and select all templates available. When templates are available in various languages you can change this too.

There might be fields which you need to specify, like dates an amount or a name. Those will be highlighted in blue. To adjust the content of those place holder fields you can enter the information in the respective fields underneath the message. Once you have entered the information, your input will overwrite the blue fields, and the content will be highlighted in green.

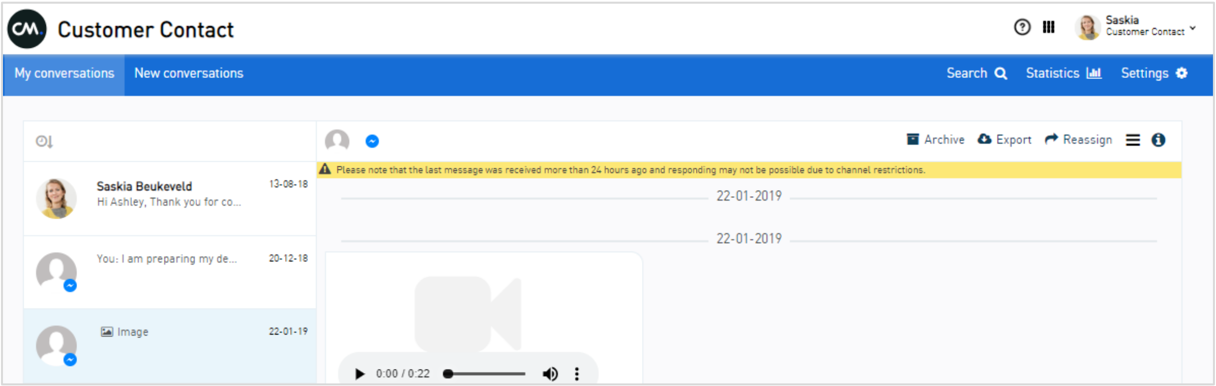


Once you click on Send, the message will be send to the user. From this moment on you can enter any type of information again.

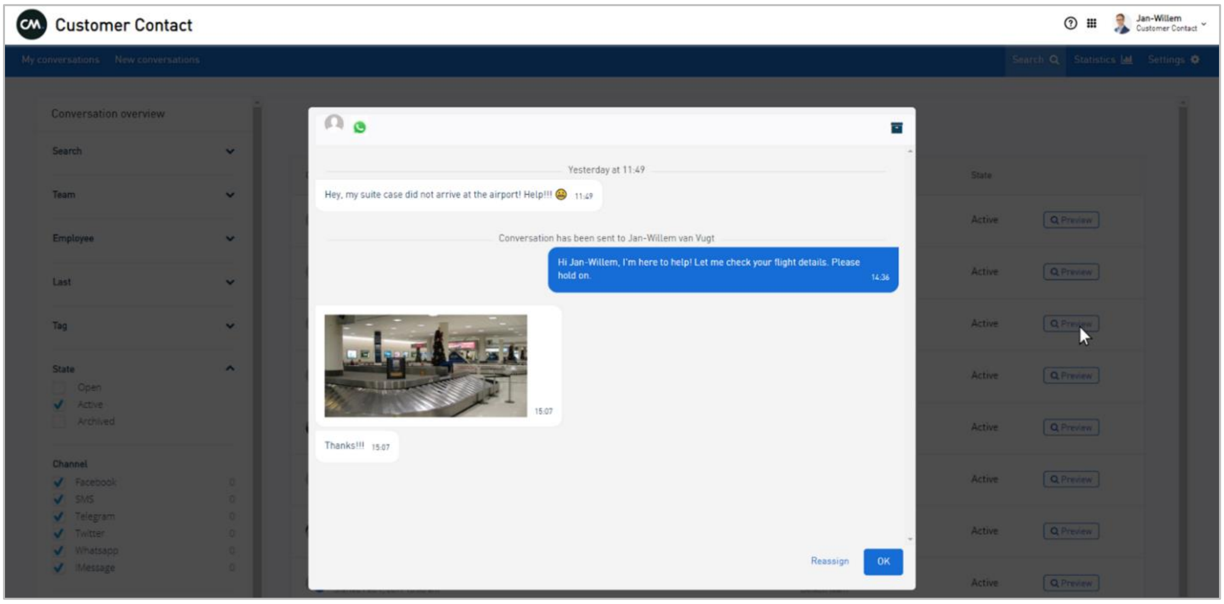


Reassign

You might find yourself in need of the expertise of a colleague or having to transfer a customer to the next shift and we allow this by reassigning a conversation., and you want to reassign the conversation to a colleague who has more expertise or more time you can reassign a conversation. You can find this feature by clicking on this icon.



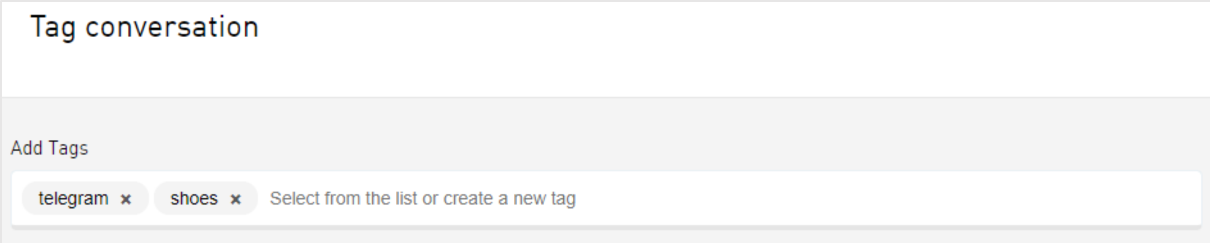
You can only assign a chat to one of your colleagues whom is also logged in. We do this to ensure that the customer can always receive a response and need not wait for their conversation partner to come online.



Tags

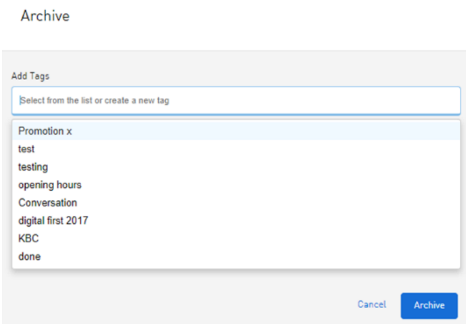
The questions you receive from your customers likely have something in common, or can be grouped. For Analysis and process optimisation purposes, you can give a conversation one or multiple tags. In the CM-Airlines example, they might do so with Tickets, Upgrade, Missing Flight and Financials. You can find this feature by clicking on this icon .

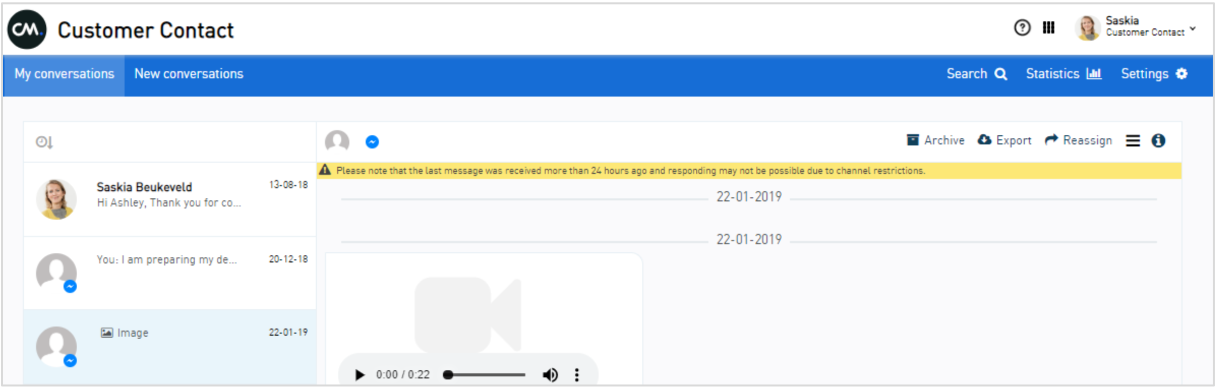
You can add tags via the Settings. Tags are also visible in Analytics. Here, you can see how many chats you had related to a tag. In Search tags can also be used, so you can trace conversations with similar tags. Adding tags is optional, though might be made mandatory from a process perspective on your end.



Archiving

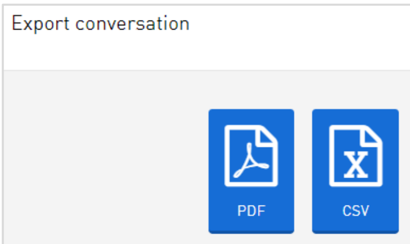
To keep your inbox clean, and only have active Chats open you need to be able to close a Chat. This is a manual interpretation and currently has nothing to do with the previously mentioned 24 hour customer care window. You do this via Archiving. You can find this feature by clicking on this icon.





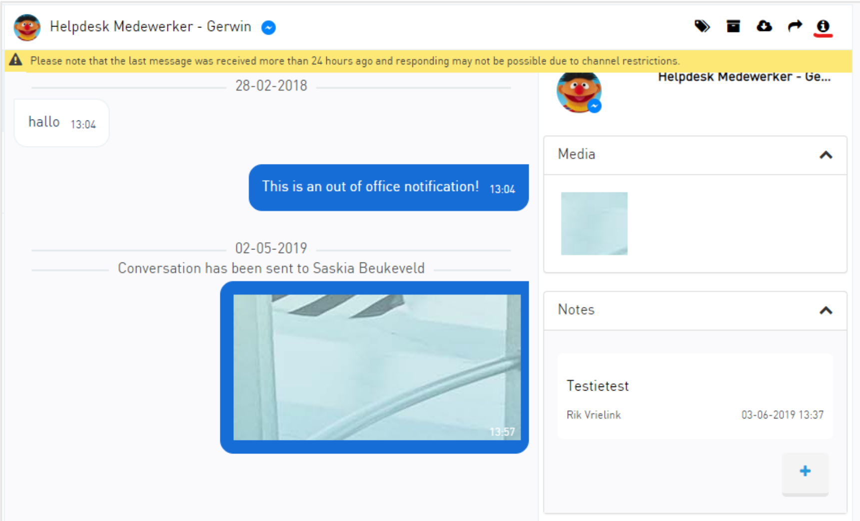
Export

There may be a need to share what has been communicated to and by a customer via a chat. You can export a conversation to PDF or CSV, after which you can share it via email. You can find this feature by clicking on this icon.



Notes

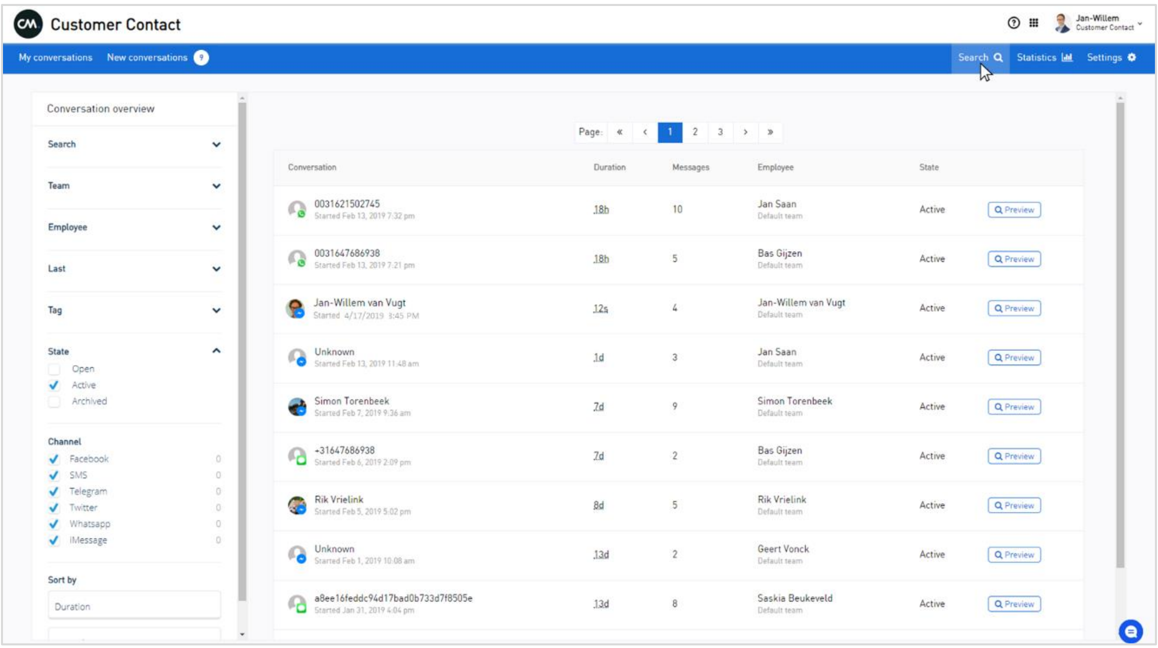
When you would like to add notes to a conversation this is possible. You can do this via the **i** symbol, and clicking on the Notes section in the appearing area. Notes will be available to this conversation, and also when you export the conversation, the notes are included in the export.



Search

When you are looking for specific information, you can go to Search. For example if you want to know which of your team mates is helping a specific customer. You might have a name, or just a phone number. When you have many conversations, you might want to limit the search range – based on communication channels, a tag or a date.

> Please note that your search needs to be **exact**. Example :
>
> You want to search on a phone number: +31-612345678. This will not lead to results since we don't have an exact match, but when you would have searched on 0031612345678, you would find results.



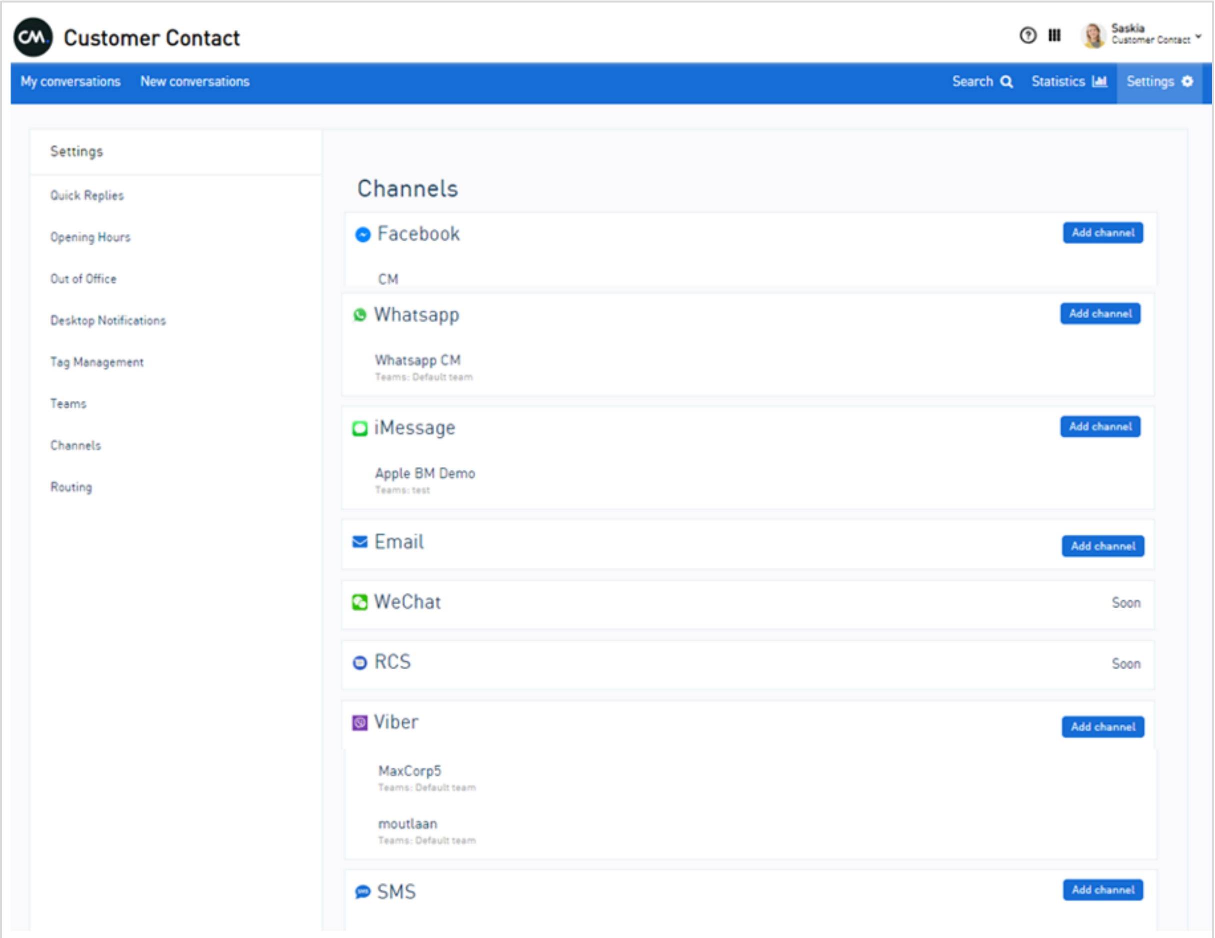
System settings

When you enter the system and have administrative access rights, you can configure the flows best suitable for your organisation. Most of the (throughput) time will be spent in Channels, though this is usually a one-off activity.

Via **Channels**, you can add and (de)activate the communication methods via which your customers can reach you. For Customer Contact to work, you need to configure at least 1 communication channel. The service providers of these communication channels all have different requirements, pricing structures and legal terms and conditions they need you to be aware of. Therefore, there is not a standard methodology to activate them. We have tried to make the flows as user friendly as can be. Though when you need support you can always contact our team, via conversational@cm.com . We have done this before.

Channel		Requirements
	Facebook Messenger	Facebook Business Page, via which users can reach you.
Business Chat	Apple Business Chat	Requires approval from Apple for Business – the so-called ABC-account which you can request access to via CM.com
	Viber	Requires approval from Viber, Rakuten. Which you can request access to via CM.com
	WhatsApp Business	Requires approval from WhatsApp, which you can request via CM.com
	Twitter	Twitter business account
	Telegram	Your user name and Bot token
SMS	SMS	Requires a CM-configured mobile phone number or short code
	email	*To be determined*

	WeChat, Line, RCS all coming soon.	*Coming soon*



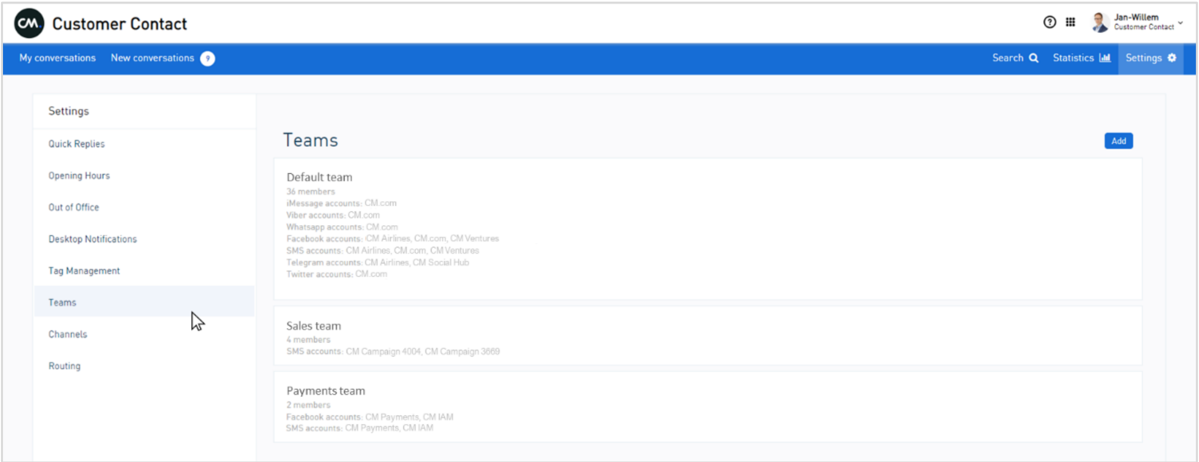
When you click on the channel you want to have access to, you will be informed about the steps you need to take. For the more complex set-up channels (Apple Business Chat, WhatsApp Business and SMS) CM.com has specific implementation guides available on the Help Center – accessible via the **?** icon.

Teams

To boost service levels, some of our customers direct incoming chats to specialists. When you have split your teams over different service areas, you can configure those teams here too. You can do this for instance based on communication channels, products or language.

When you grant new colleagues access to the Customer Contact application, they are assigned to the 'default' team. That means that they can see all incoming chats, assigned to the default team. You can limit their access to chats when required by assigning them to a specific team.

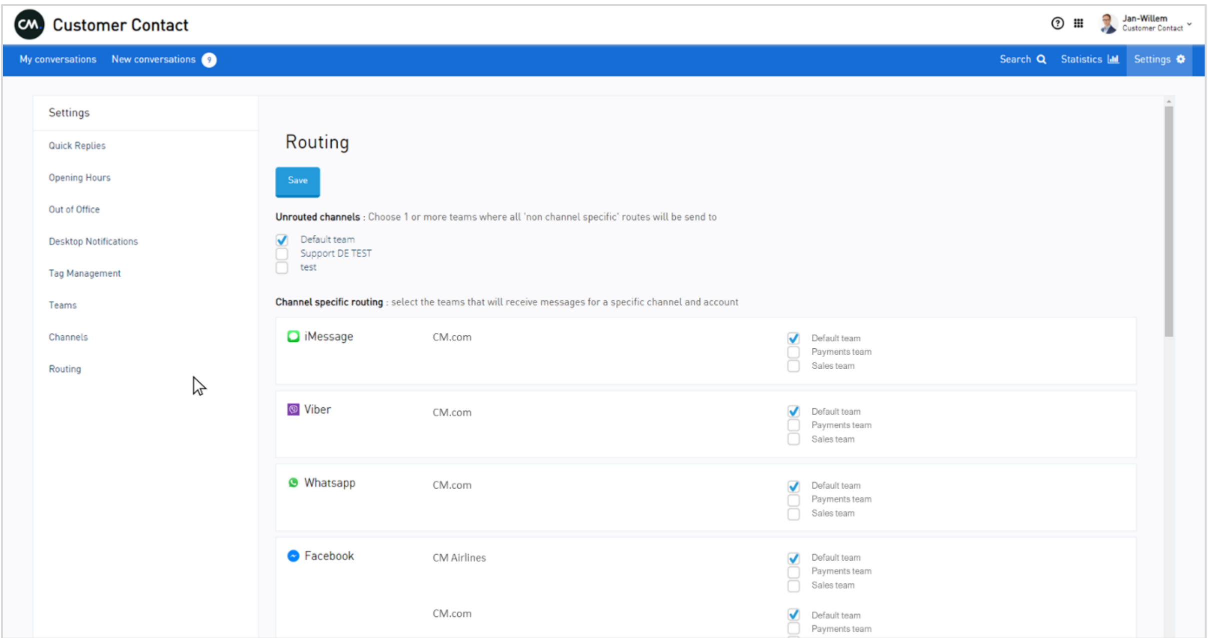
You can create as many teams as you require. Team members can be assigned to one or multiple teams.



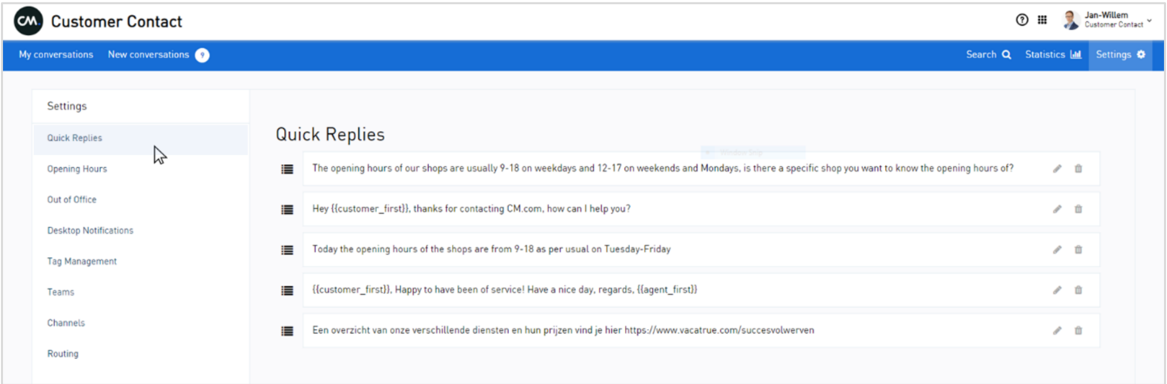
Route chats to a team

Once you determined which communication channels you offer and have set a team, you can route certain communication channels to this specific team. Here as well, our default is to route all communication channels to a default team.

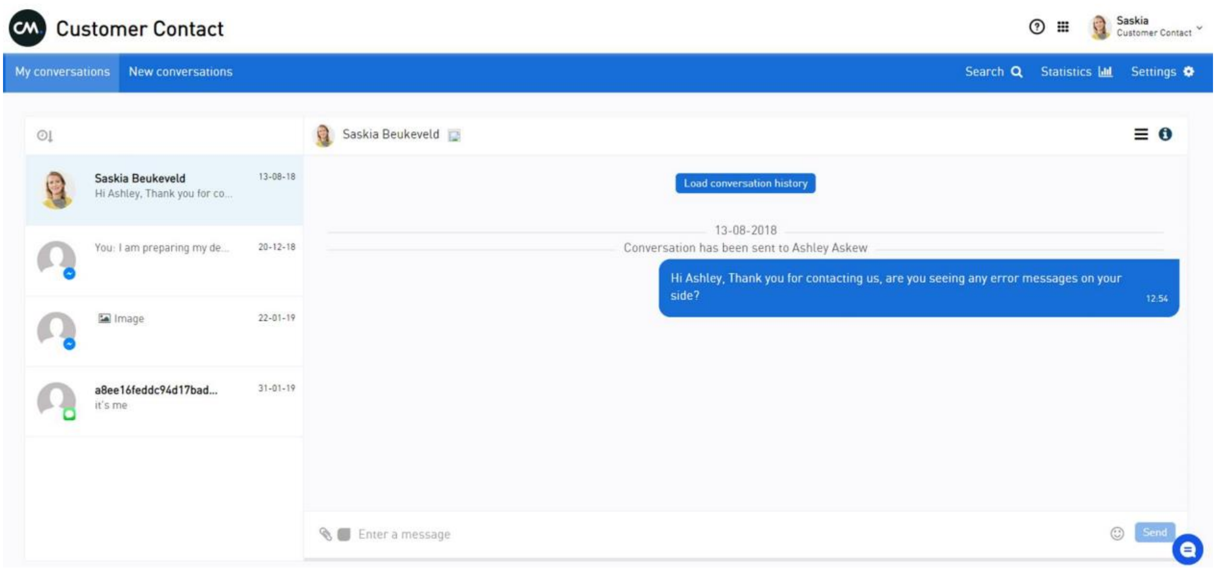
Summary: new users are added to team ‘default’. Incoming messages are routed to team ‘default’. This means that when you don’t set a Team and you don’t set a Route, all incoming communication will flow towards 1 box from where they can be picked up.



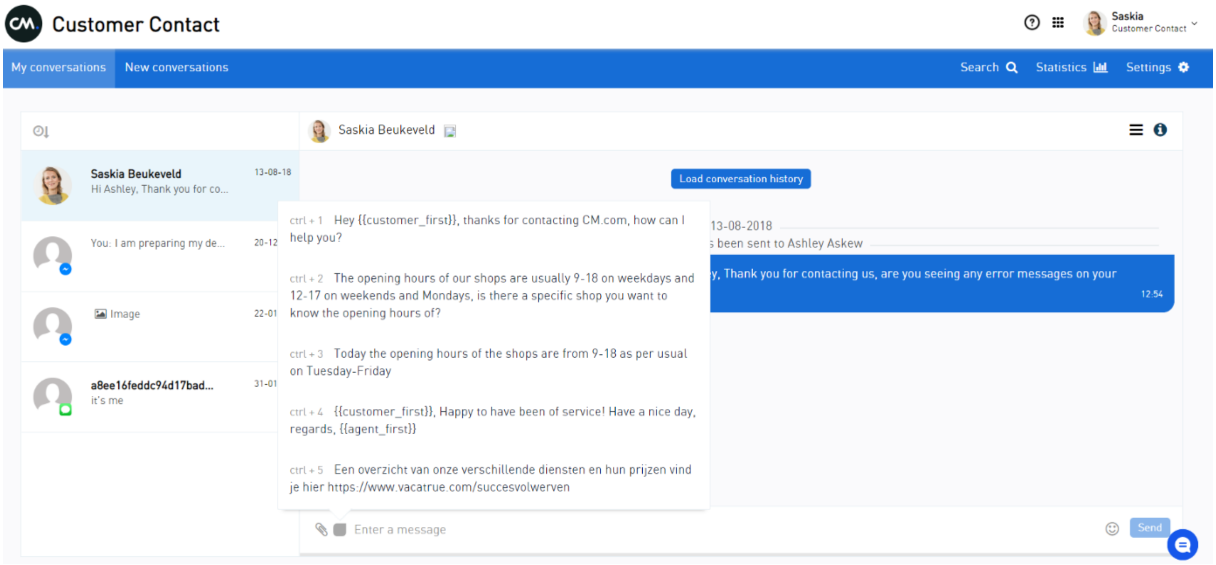
Back to the quick replies. You can set-up 1 to 5 pre-defined messages, which you can send your customers immediately after they reach out to you. These generally are welcome messages, messages to direct them to generic information. You can also set up a quick reply to close a conversation.



These quick replies can be used in the chats as demonstrated below.

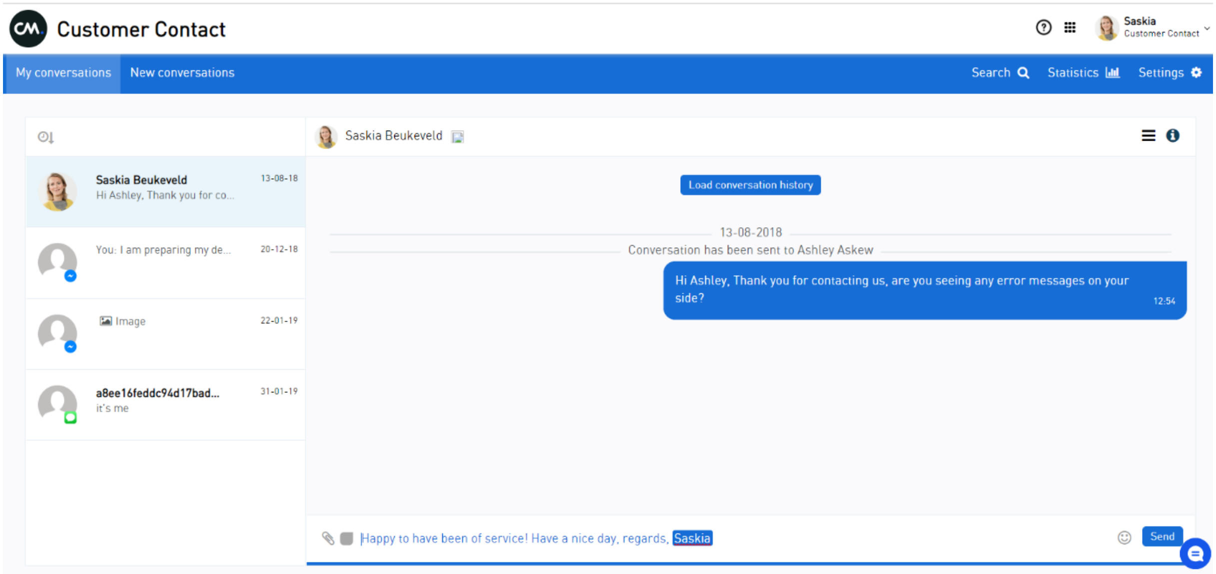


Quick Replies in an active chat can be found on the left side of the 'reply' box. They are available when you click on this dialogue icon. Or when you use the "hot keys" ctrl+ { }. The selected quick reply will appear in the reply box. You will still need to press enter to send the message.



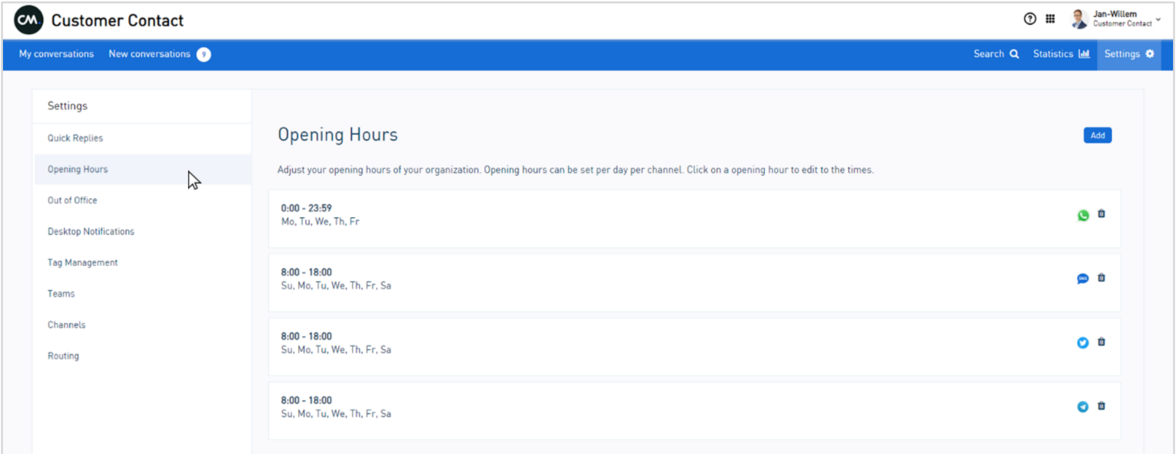
When a quick reply holds placeholder values, like { first name }, those will be marked. This will help you identifying if the placeholder value matches your conversation. When the system is not able to identify the value, it will be marked red and the Send button is de-activated to protect you from sending incorrect information.

In the below example, the user is called "Saskia", and in the quick reply there was a placeholder value {Agent_firstname}; thus Saskia.



Opening Hours

You might not always be present to answer incoming chats. To determine when you are/not available you can set your opening hours. You need to do this per team. So you could set different teams whom handle different communications channels.

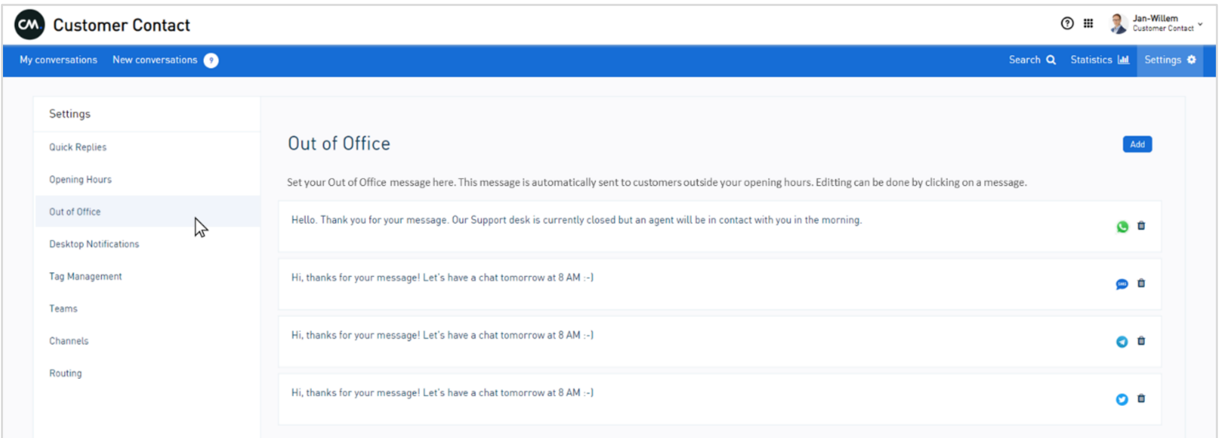


Out of Office

Nb. Only useful in combination with Opening Hours.

Customers expect your response quickly, but you also need a break once in a while. When you are not around, you can send automatic notifications. Those will only be sent once you receive messages outside your opening hours. You need to do this per communication channel.

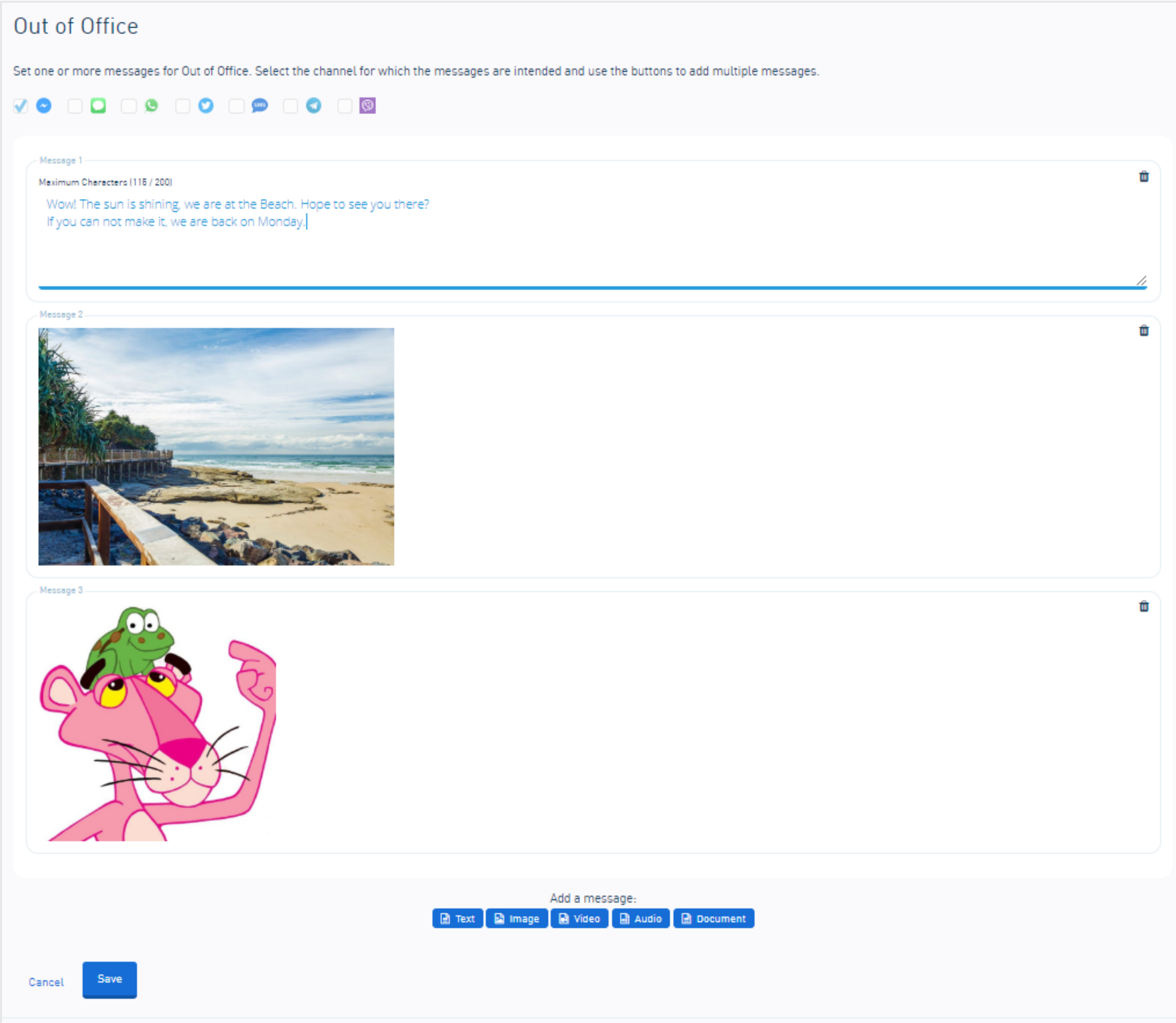
We advise you add to the out of office replies when you will be back in the office to pick up the support need. When other communication channels are supported 24/7, we suggest to add how those can be used to get support. Email addresses, phone numbers, and or a link to frequently asked questions or your website might also be helpful.



Rich out of office messages

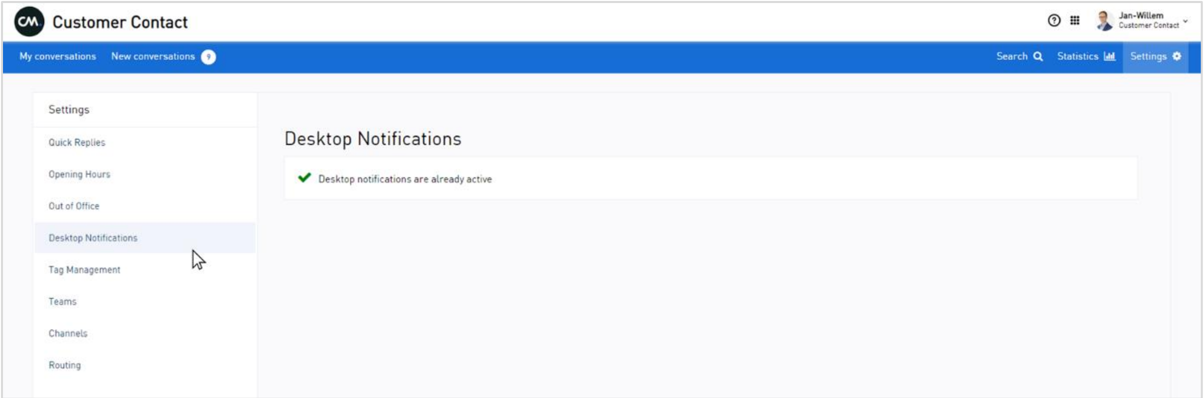
Depending on the features per communication channel you can tweak the content of your messages, and include rich features like images or video's. Since the features per channel differ you need to set this up per available communication channel.

When you are adding for instance a text messages and images those will be send at the same time, though count and appear as two messages on the users phone. The number of messages you can include in one out of office notification does not have a limit.



Summary: Opening hours combined with Out of Office notifications are a powerful way to inform your customers where they can find information when there is no agent available to support them.

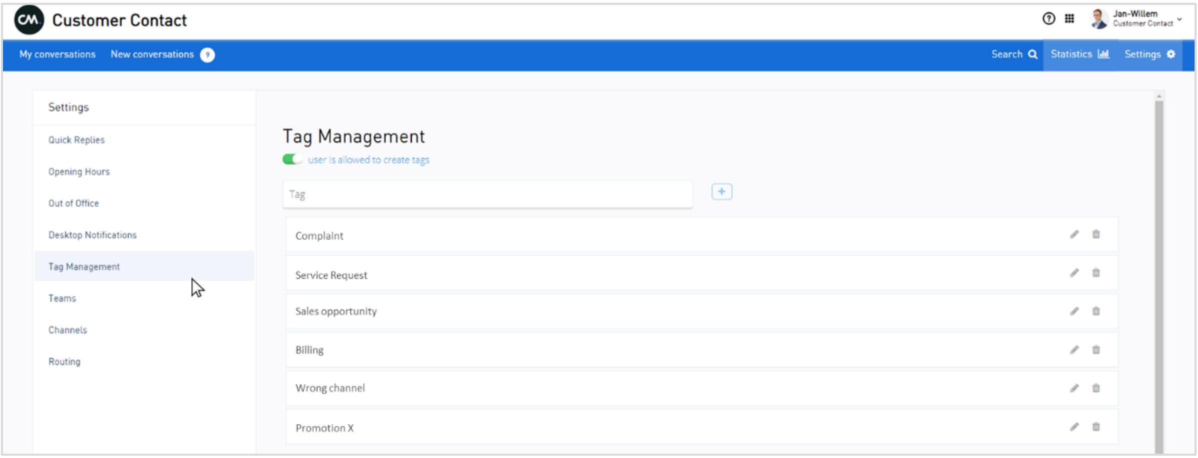
Desktop Notifications



Each of you can determine if you want to be notified by the systems that new conversations have been initiated. When new chats are appearing to your inbound overview, a customer needs your help. To grab your attention, you can set-up desktop notifications. You need to set this per browser via which you access Customer Contact.

Tag Management

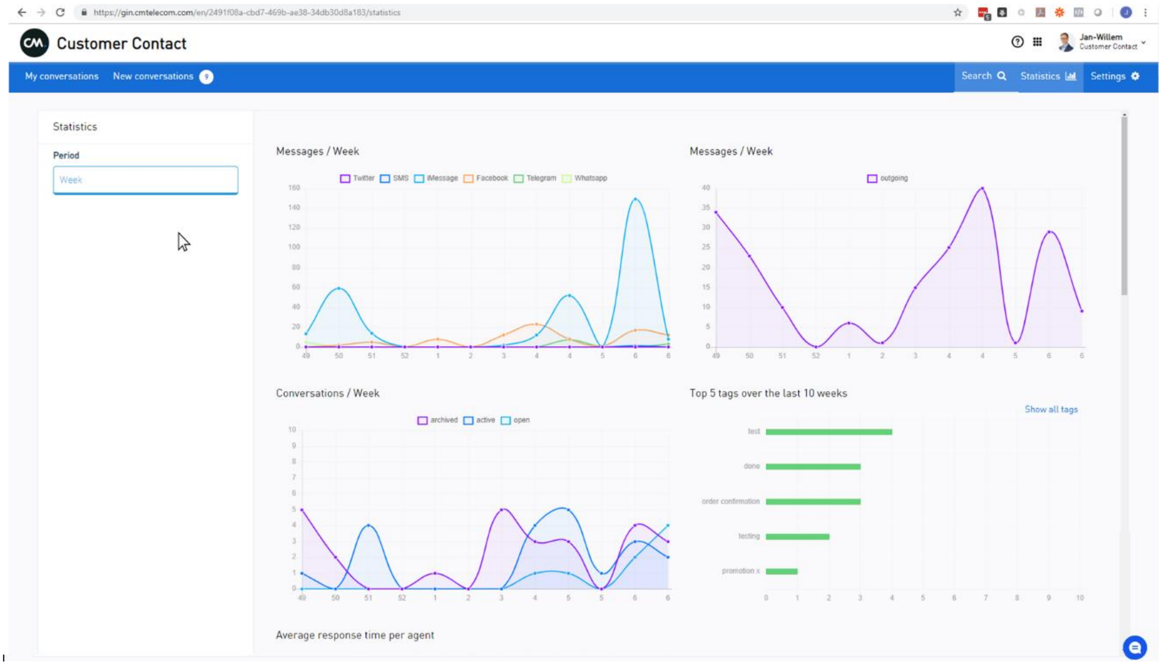
Incoming chats can be tagged. This helps you when you archive them and later on want to find something again. Tags are different per organisation. Hence they can be set here, or you can create a tag which is missing in the tag pop-up. You can add a tag to a conversation once you are working on a chat to classify them, or later on when you archive a chat or when you are looking at the statistics. It is optional to add a tag. One conversation can have zero or more tags. In a preview paragraph about CM-Airlines, we have explained how this works for users.



Analytics

In the Analytics section of the customer contact application, you can take a look at most popular trends, which communication channels are used most, and how long conversations last.

Do you want more information about your Customer Service requests, and maybe even combine this with other data sources like your marketing campaign tooling? Please take a look at CM-Data.



Customer Contact
My conversations
New conversations
Search
Statistics
Settings
Statistics
Period
Week
Messages / Week
Twitter
SMS
iMessage
Facebook
Telegram
Whatsapp
Messages / Week
outgoing
Conversations / Week
archived
active
open
Top 5 tags over the last 10 weeks
Show all tags
test
done
order confirmation
testing
Average response time per agent

Pricing

Subscription	Essentials	Business	Enterprise
Monthly subscription fee:	€99	€299	€499
Users:	First 3 free, every extra user € 30	First 3 free, every extra user € 25	First 3 free, every extra user € 20

User subscription

With one of our monthly subscriptions, you have access to our customer contact application for 3 users. You can add more users at an additional fee per user per month.

Pricing per message/conversations

Each communication channel has a different pricing structure. Usually, avoiding costs for the consumer. To ensure your organisation is aware of the terms, conditions and pricing for some of the communication channels, additional contracts (appendixes) are required. Pricing of each individual communication channel can be found on our pricing site.