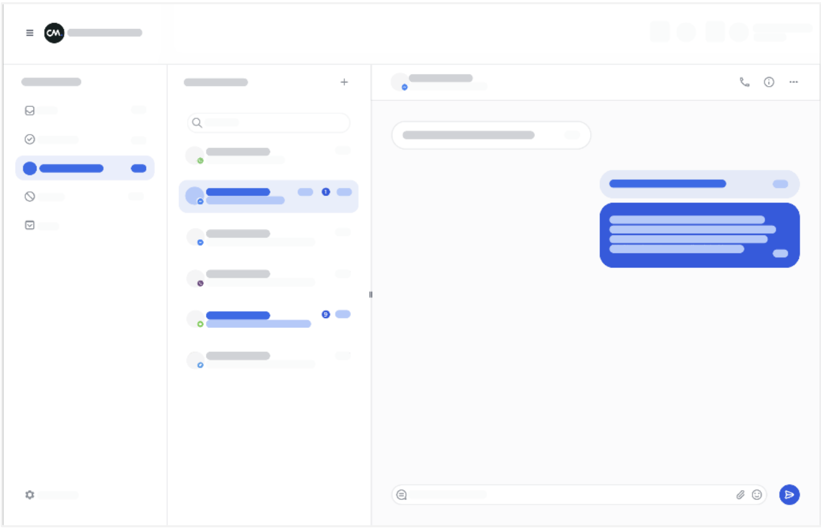
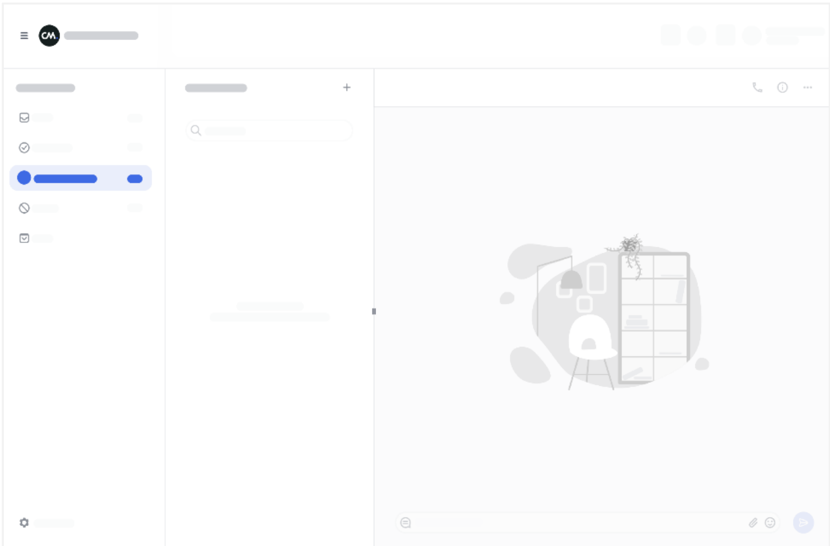
Customer Contact User Guide





CM.com
June 2020
V2.3

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, check what is happening on Twitter, 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 us via our website, CM.com, via phone +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 large batches of users (up to 2 Million). Useful to send 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

How do users find you?

How a conversation starts depends on where you have informed your customers how to contact you. 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. We have 2 inspiring blog posts with more examples for you.

- Start the Conversation
- 6 Customer Care touch points

Rather watch this content in video?

Yes, those are also available. You can find those here:

https://www.cm.com/help/products/customer-contact/

Get started

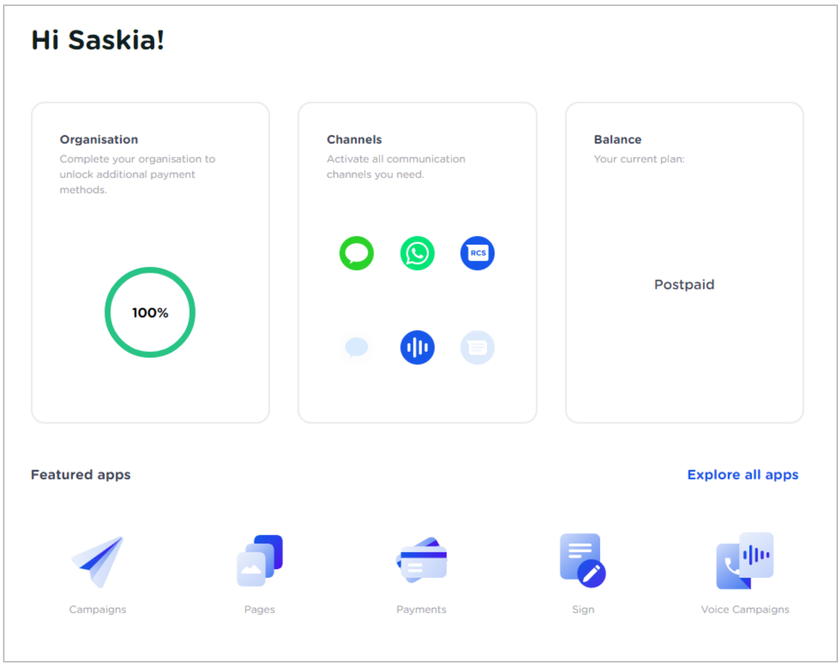
Access to the application: Please [Register](#) to our platform. Do you already have a CM.com account, then [Log in.](#)

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.

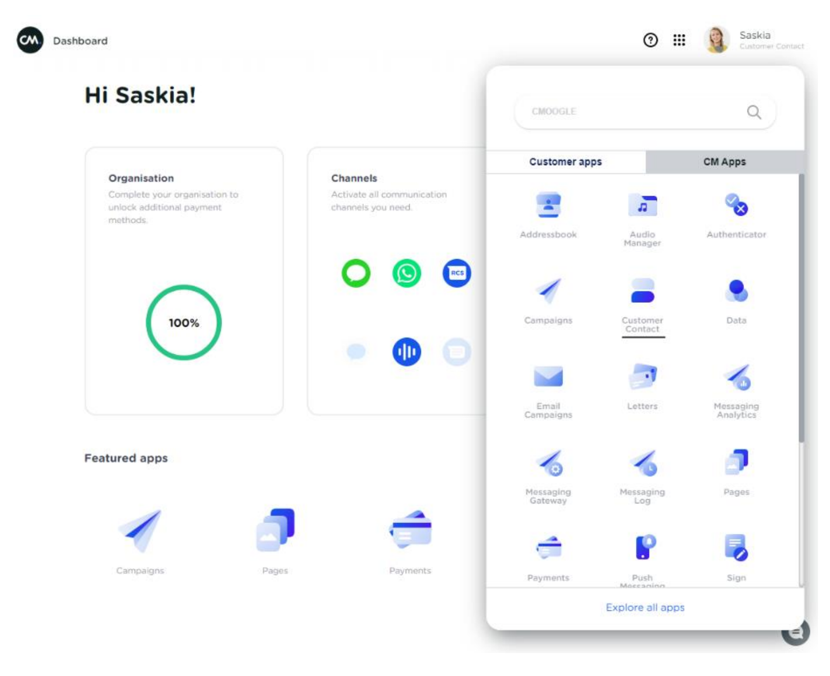
The ? sign navigates you to the Help Center.

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

Saskia CM Telecom B.V. Via your profile / image sign you can always find your organization's profile. It helps you to navigate through information like your organizations financials and core settings.



You can find pre-selected apps in this overview.



When you cannot find the application you are looking for:

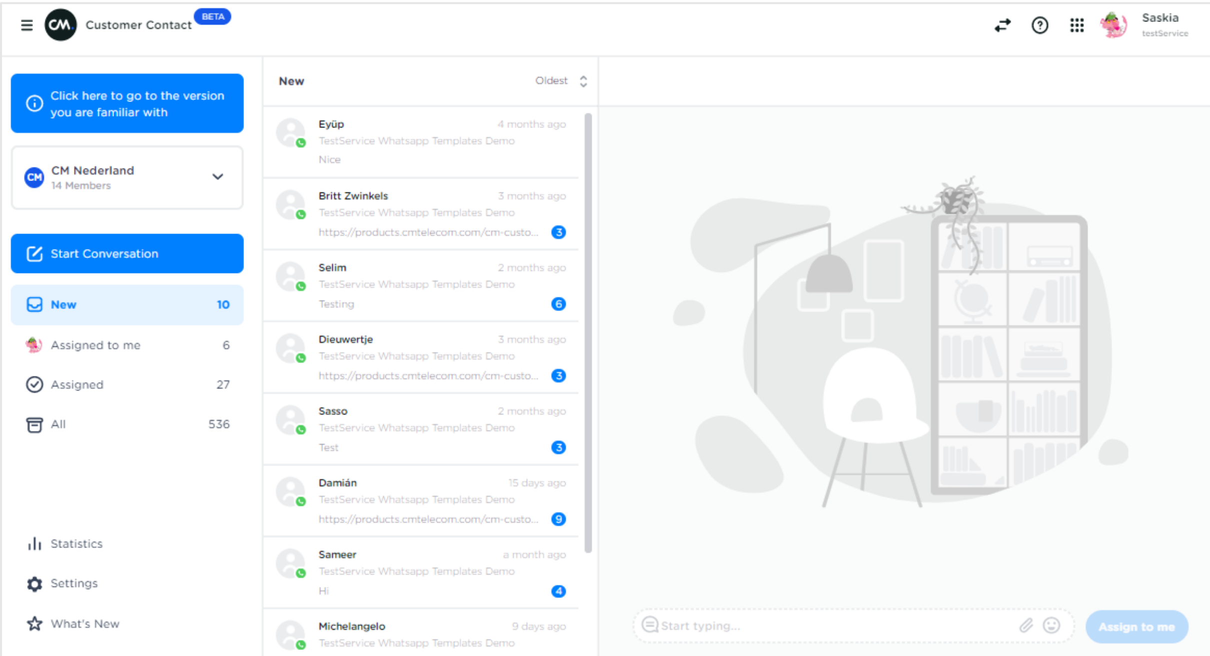
Click on the icon.

And/Or

Click on "Explore all apps"

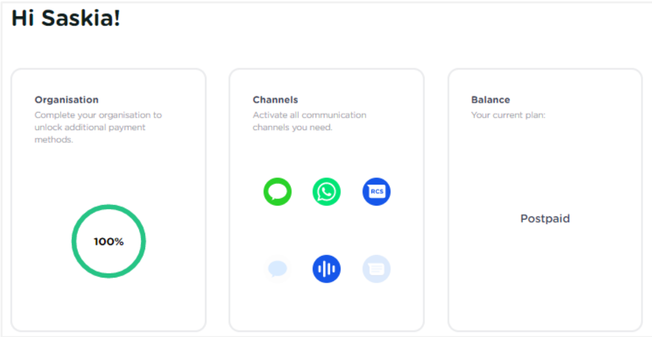
Now search for the Customer Contact application.

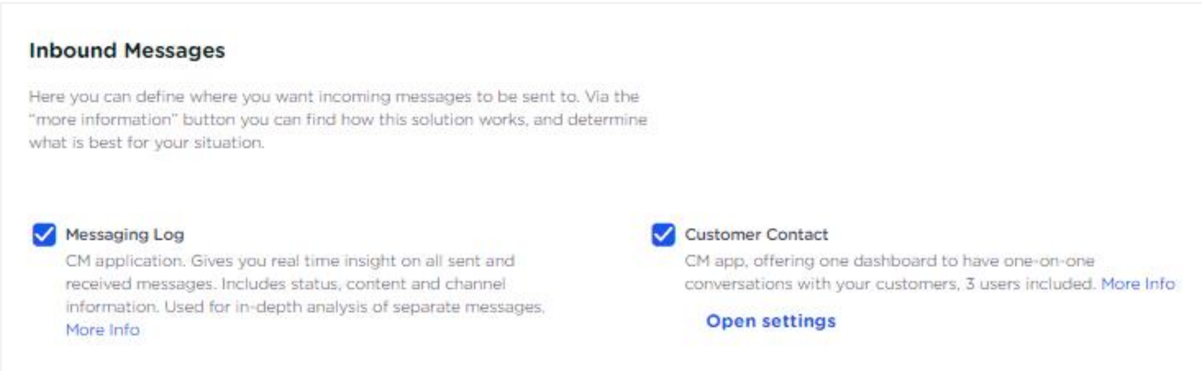
Once requested, we install customer contact on your online profile, nothing will be installed on your PC. To help you with the navigation there is a small onboarding flow, to educate you on the most important features of the chat-system. To make the set-up easy, we will also help you navigating through the most commonly used features. So you can get started right away. You can always get back to those items when required.



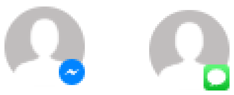
Incoming messages

When you as Customer Contact user make use of WhatsApp Business, Apple Business chat or SMS we install those communication channels for you. This configuration is found in the overview where you can find the overall configuration of those communication channels.





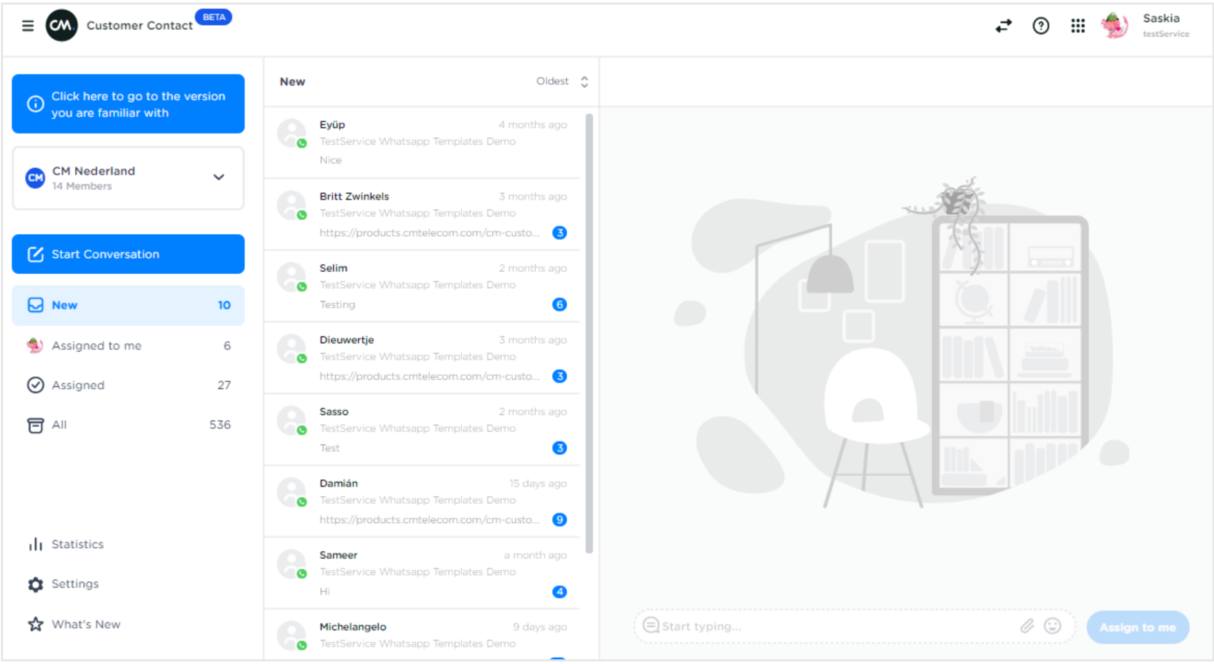
Your conversation inbox



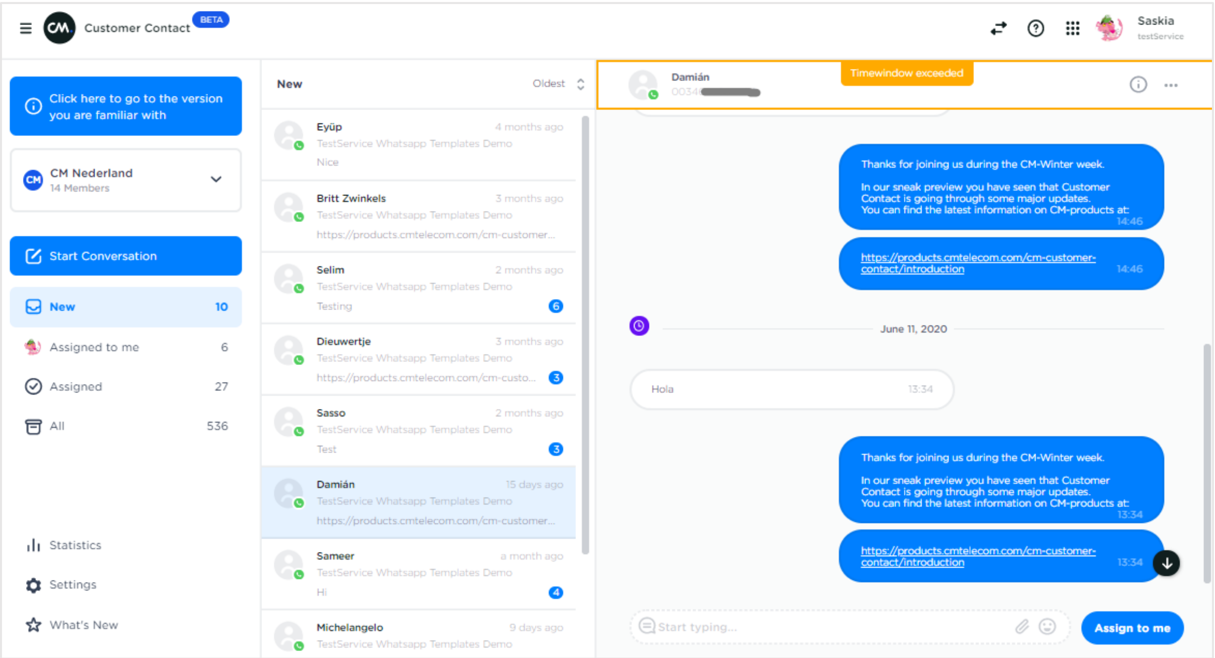
Once a consumer starts a conversation, all new conversation are sent to CM-Customer Contact. Via the small icon you can see the communication method your customer is using. Other than 'nice to know' you have no action for this.

New Conversations

In the first tab, called "New", all the conversations which are not assigned to you or any of your colleagues are visible. These conversations need to be divided over the support employees.



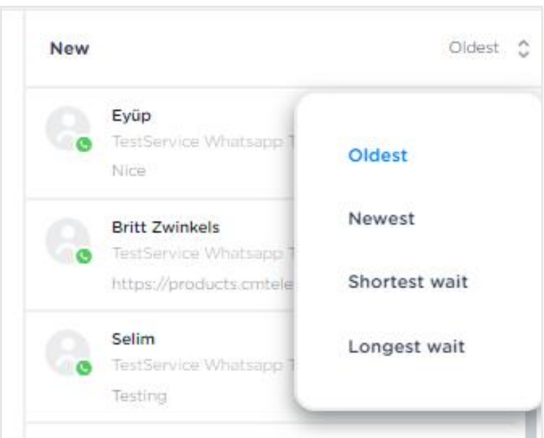
When you click on one of the incoming conversations the context will be visible. Now you can decide if it is you, or one of your colleagues with a different expertise who will answer this chat.



When it is you: click on the “Assign to me” button. The conversation moves straight away from the New inbox, to your own inbox – also known as Assigned to me. This conversation will automatically disappear from the list where you and all your colleagues could see it. You are now the owner of this conversation.

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.

Sorting



We sort the conversations based on the time they were received by the system, and the oldest are on top. You can alter your sorting by:

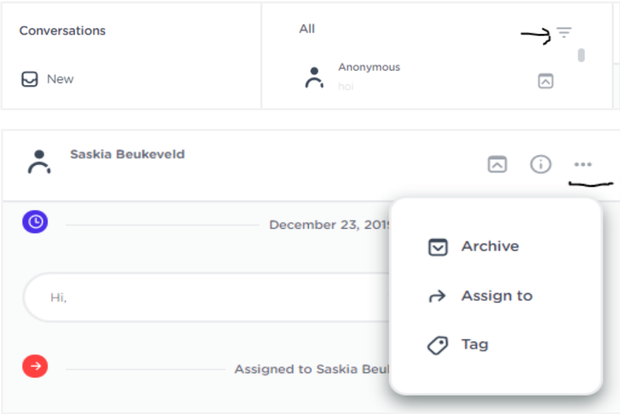
1) Oldest - thus the first conversation which has come in
2) Newest - the latest conversation which has been received

Chats might occur in various time periods, we also added:
3) Shortest wait - customer to whom you have recently spoken too
4) Longest wait - customer to whom have not received a reply for long time.

Assigned

Conversations are no longer available in the shared inbox, New, once they have an owner. To keep an overview on the assigned work, and active conversations all those are available in the "Assigned" tab. This feature is often applied when employees are not able to follow-up on chats which they already started. Via filters you can narrow your search, for instance on employee level.

Once you know the correct action, you can change the owner of a chat. Click on the three dots, and click on "Assign to".



Spam (Not yet ready…)

Odd but true, there are people who will send you messages without any value. No content, not responding to your replies, or people whom like to bother others. For those conversations we have the Spam area. Conversations in this section will be marked as Spam, and new messages for those conversations are directly send here. You no longer have to take a look at those conversations.

They are removed from part of the statistics via a filter. Those messages have no owner. When you are testing this feature, or when you have made a mistake and conversations can end up in the Spam area. Also from here you can pick-up conversations by assigning them to yourself or one of your team members.

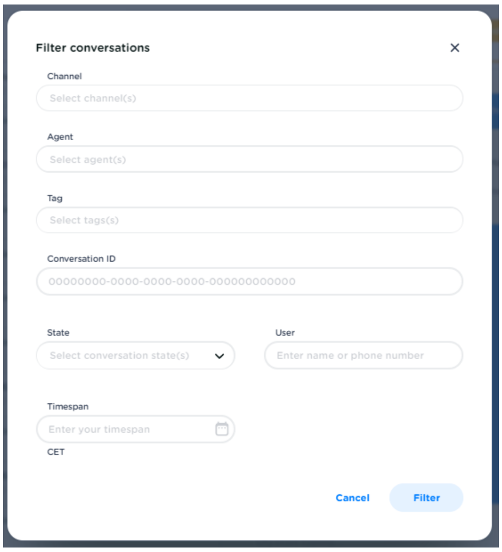
Rationale over Archiving: When we archive a conversation, new messages send by the consumer are noticed as new conversations. That means that you need to address them over and over again. In this area you only needed to mark them once, and they will no longer bother you or your colleagues.

All Tab

In the All tab, you can find back All conversations which we have in our active system and archives for you. When conversations still have an owner, and thus are still active you can see this, but also the conversations which need to be answered can be found in this section. When all goes well, this usually is a large amount of conversations. Filters are therefore crucial to find back your information.

The filter options are:

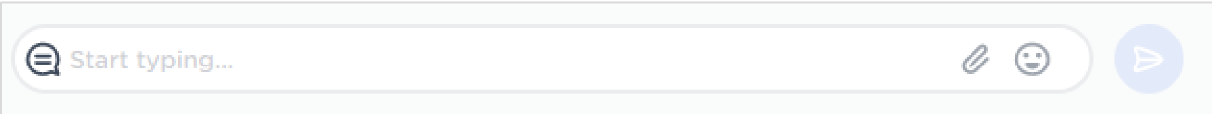
- Channel, via which communication channel messages came in
- Status, which can be new, assigned, archived.
- Agent, you or one of your coworkers
- Tags, are the tables you marked a conversation with for analysis purpose
- Timespan, reflects the **start date** of a conversation
- Conversation ID
- And you can add a Wild Search, on user name or number.



Assigned to me

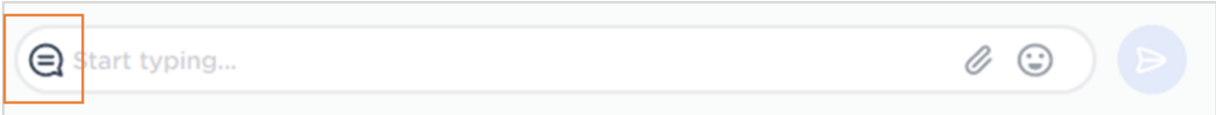
Reply

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 the send icon, or by pressing “Enter”. Automatically the system will send this message back via the communication channel your customer has initiated the conversation in.



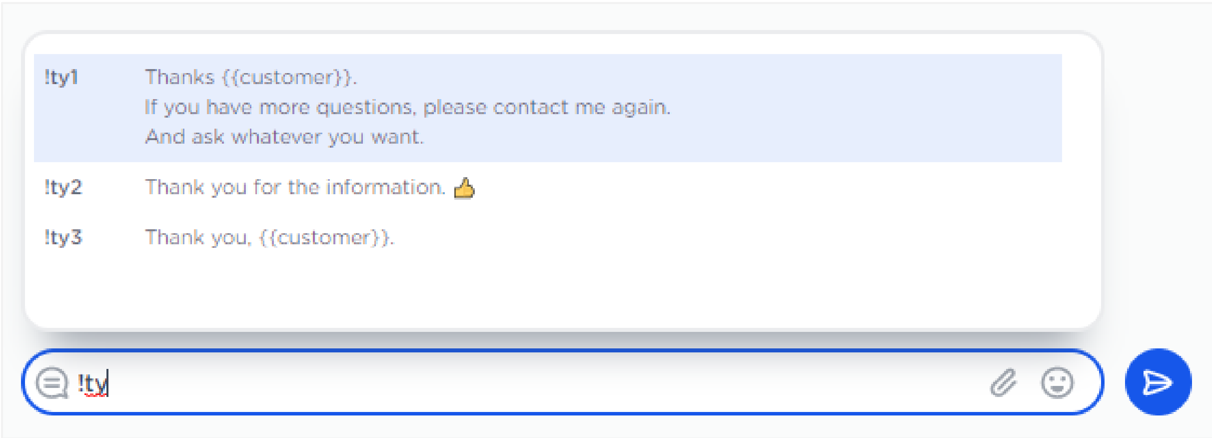
Quick replies

When you find you are repeating yourself, we can help you work more efficient. The Quick replies are there to help.



When you click on the text-bubble in the type bar. A pop-up will appear with all your quick-replies. When you have grouped your quick replies, click on the category, and trough till you found your matching answer. This menu works with tab, arrows (up and down), enter as well as your mouse.

Additionally, each group can be called for by using the exclamation mark in the text bar. When you continue typing you will find your matching answer and click enter.

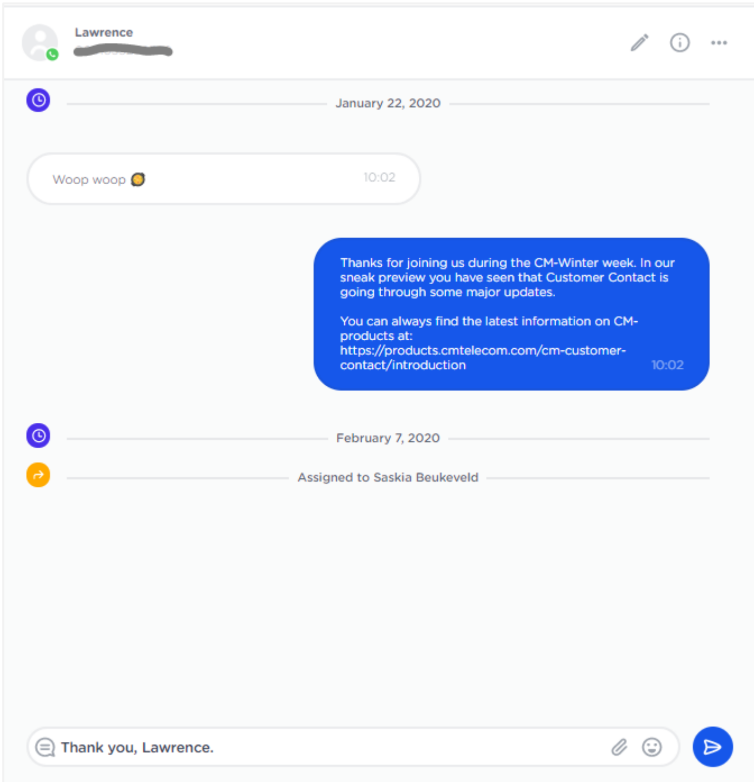


In above case we are in the grouped Thank You (!ty..) messages.

NB. Via Settings you can add/alter the quick replies. Those responses are not determined by the system, they still need your interpretation and selection.

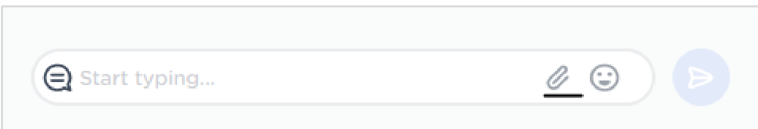
When a quick reply holds placeholder values, like { first name }, those will be automatically filled with the known information from the chat. When the system is not able to identify the value, it will be marked red and the Send button is de-activated to protect you from sending incorrect information. You can then add those missing items can be added.

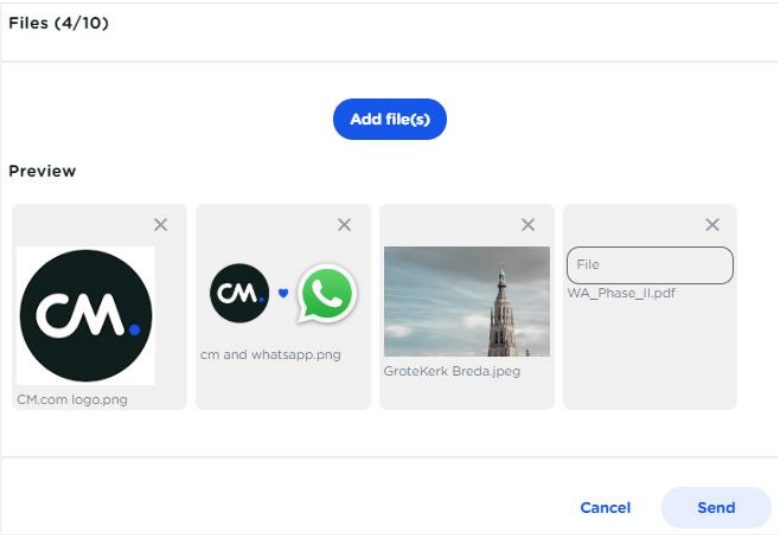
In the example (!ty3), the customer user is called "Lawrence", and in the quick reply there was a placeholder value {{Customer}}; thus Lawrence.



More than text

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

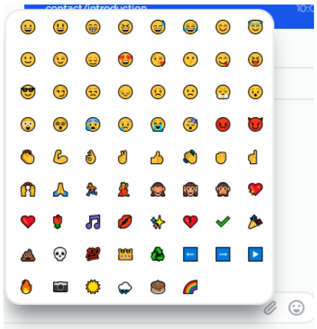


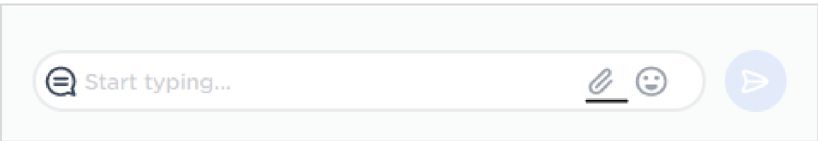


To avoid you send incorrect information, there is a preview panel opening after you have selected a file. You can add up to 10 files at the same time.

Note that 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.

Also a sending a smile via submission of emoticons is simple, just click on the image, and all available emoji's appear. Pick one, and send it or include it in a line of text.

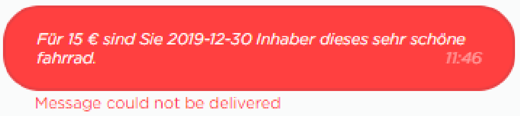




Errors..., something went wrong

When messages cannot be delivered there can be several reasons for this. Most likely it is related to one of those reasons:

- Conversational window closed (see chapter conversational window)
- You tried to send content which is not supported by the channel
- User has blocked you
- User lost it's internet connection (we will try to deliver the message for 24hrs)

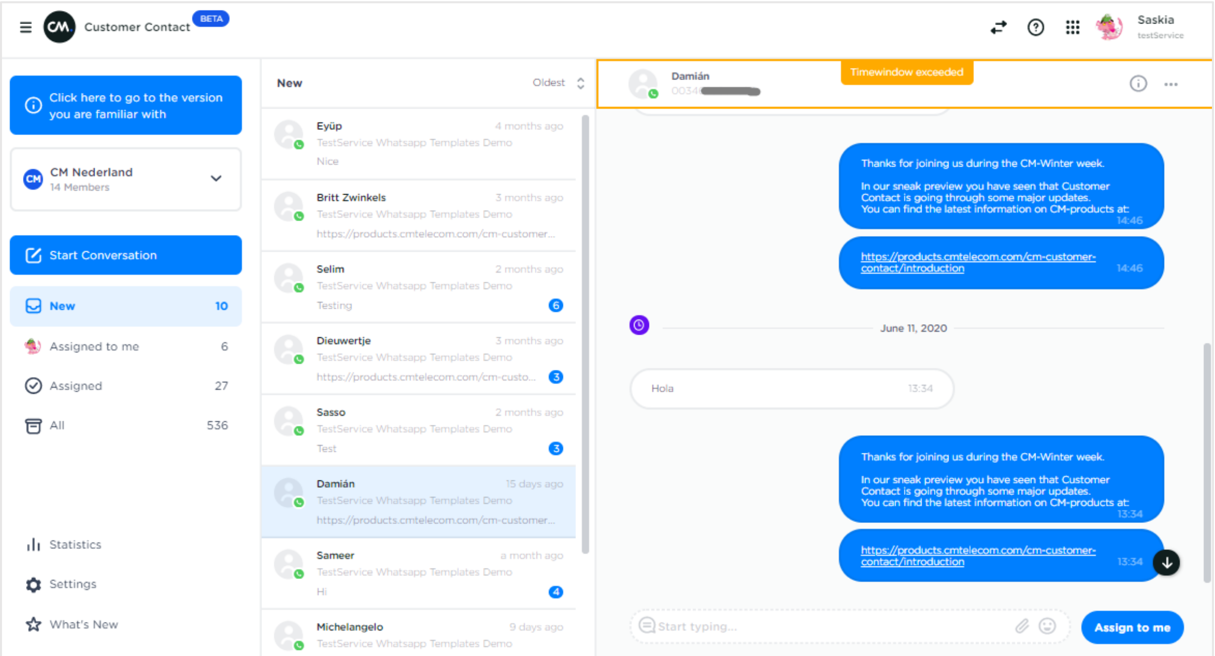


Conversation window

Each chat app (WhatsApp Business, Apple Business Chat, Facebook Messenger) has different rules about your response time to your customers. These rules ensure that you deliver high service levels using their platform.

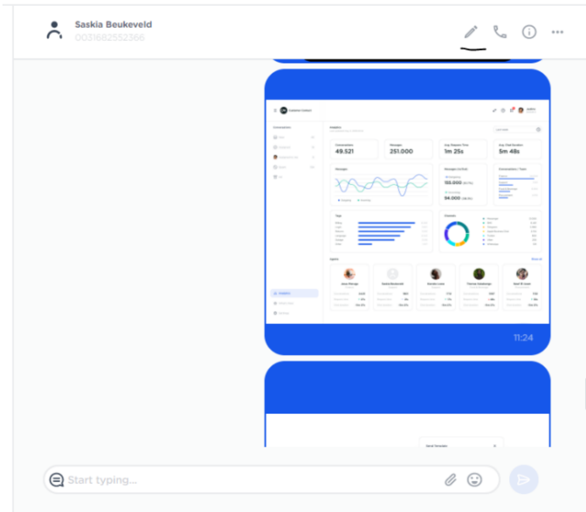
WhatsApp Business, for example, dictates that you have to reach out to consumers within 24 hours after they contact you. This is calculated from the *last* message the consumer has sent. Obviously not so handy when it is weekend or a bank holiday.

When this window exceeds, you can only respond with message templates. More information about those rules can be found in the Help Center and specific chat app documentation. We will help you to detect when sending a template message is required. In below example you can see that the conversation window is closed.



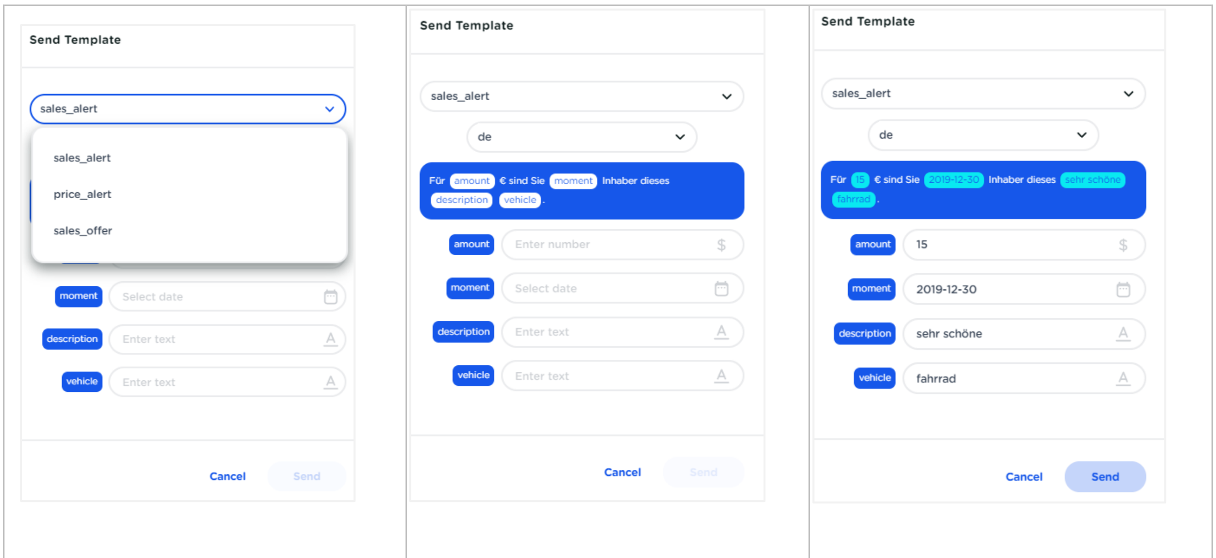
WhatsApp Templates

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.

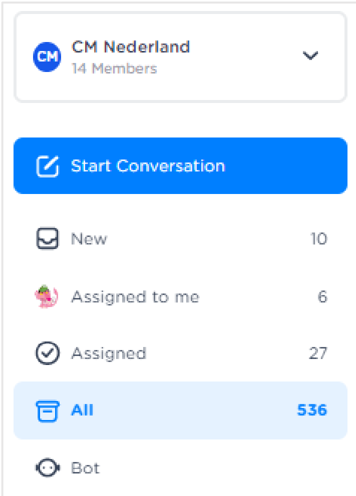
There might be fields which you need to specify, like dates an amount or a name. Those will be highlighted in blue. To adjust the content of those place holder fields you can enter the information in the respective fields underneath the message. Once you have entered the information, your input will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



Select template | *Fill in missing fields* | *Send the message*

Once you click on Send, the message will be send to the user. Once the user replied you can send any information again, and the window is considered open again.

Start the Conversation



There are circumstances where you would like to start a conversation, and not await till someone contacts you. You can do this by clicking on plus icon in the "my conversations" tab. All new conversations will be set-up in your inbox, which means you are the initiate owner of the conversations you start.

Step 1. Click on Start Conversation

We will guide you trough the steps needed to send a message, and start the conversation.

Step 2. Select the channel

You need to inform, via which communication channel we want to reach out to your customer. When you have more than one communication channel activated you need to select this, and in some cases even which number/page we should use.

Step 3. Upload of contacts

- When you are making use of a stable contact group you can upload a large list with contacts in the CM-Address Book
- Making use of a more random group of contacts, you can copy paste the contact information one by one.

Step 4. Enter your message

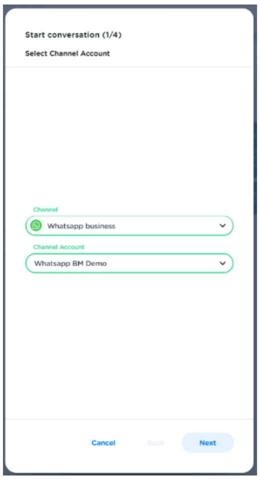
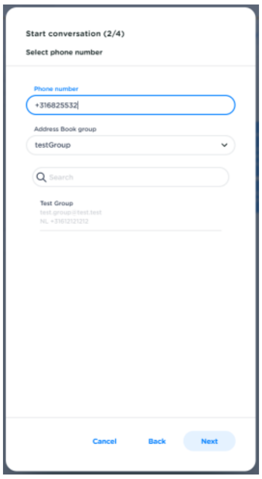
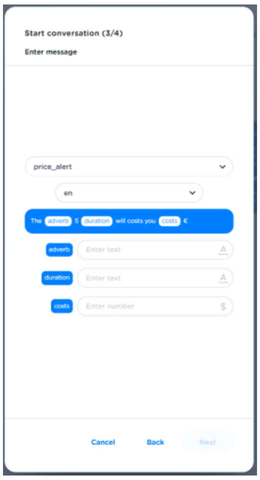
Depending on the selected communication channel, restrictions on what you can send might apply. For instance via WhatsApp you can only send pre-approved templates, with the use of variable fields you can personalize the message. When reaching out to someone via Twitter, you can send any message type.

Step 5. Review and Send

Review your message, and send it when you think it is okay. Now a conversation will be opened in the system, and the person you reached out to can reply to you in this chat.

Note: Make sure you have an opt-in, and are allowed to contact a person. You don’t want to violate the policies, neither be blocked by the user!

Overview, of the process steps:

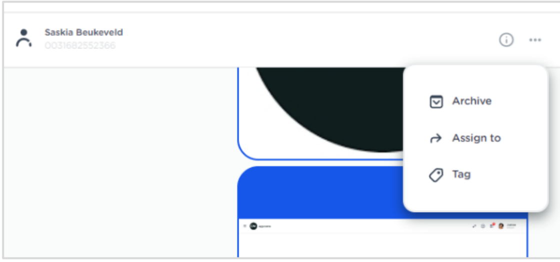
Select Channel	Select contact	Enter Message	Send
			

Once you clicked Send, the message is send and the Conversation appears in your own overview – assigned to me. Once the consumer responded the conversational window is open, and you can continue the conversation.

Reassign

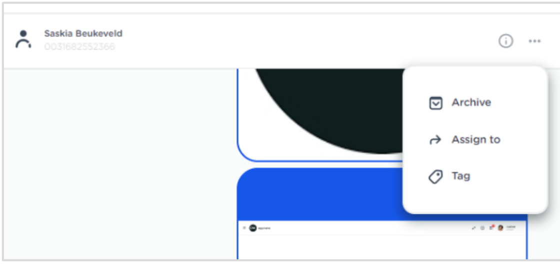
You might find yourself in need of the expertise of a colleague. Or you to transfer a customer to the next shift. You can do this by reassigning a conversation.

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.

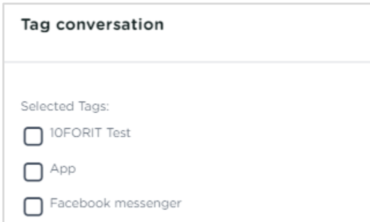


Tags

The questions you receive from your customers likely have something in common, or can be grouped. For Analysis and process optimization purposes, you can give a conversation one or multiple tags.

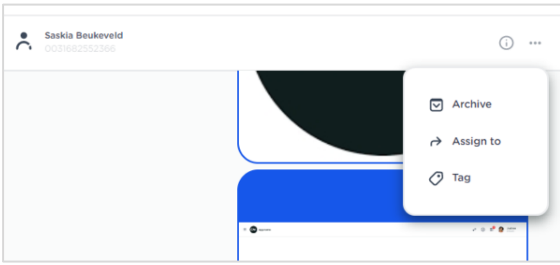


You can add tags via the Settings. Tags are also visible in Analytics. Here, you can see how many chats you had related to a tag. In Search tags can also be used, so you can trace conversations with similar tags. Adding tags is optional, though might be made mandatory from a process perspective on your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



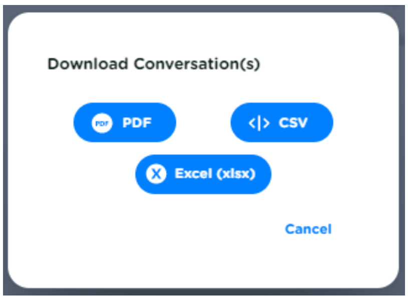
Archiving

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.

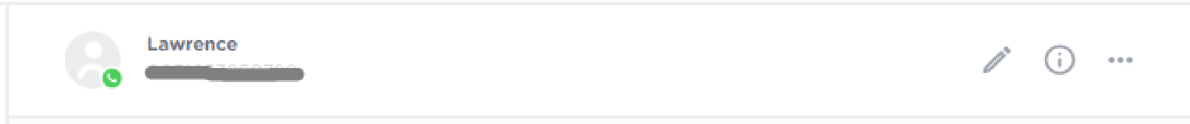


Export

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, Excel or CSV, after which you can share it via email. You can find this feature by clicking on this icon. The notes are included in the export.

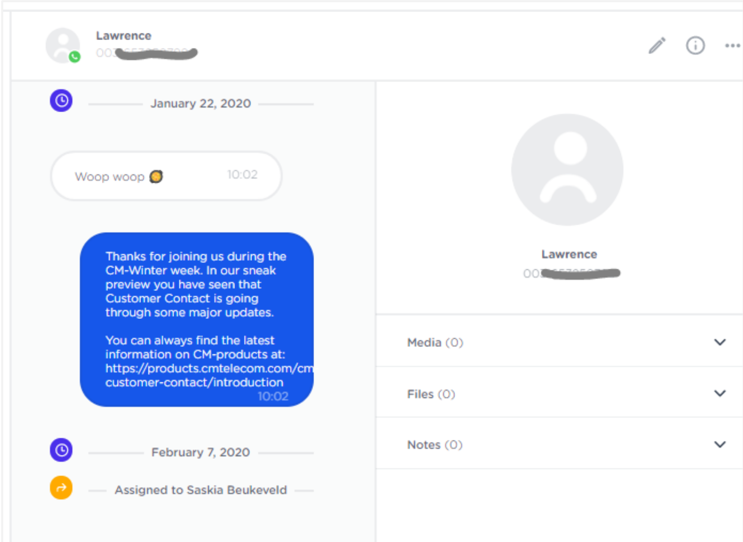


Notes/Files and more information



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.

In the same area you can also find more information about the files/media items –



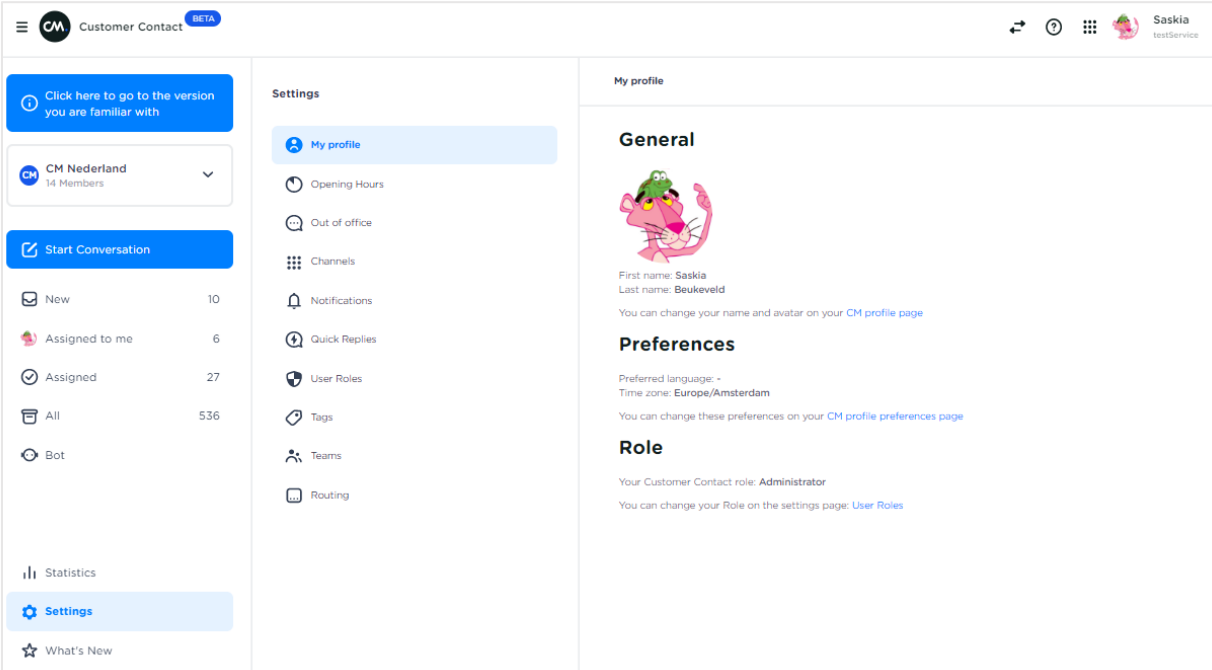
Search

When you are looking for specific information, you can find this information in the ALL tab. 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.

Settings

When you enter the system, you can configure the flows best suitable for your organization.

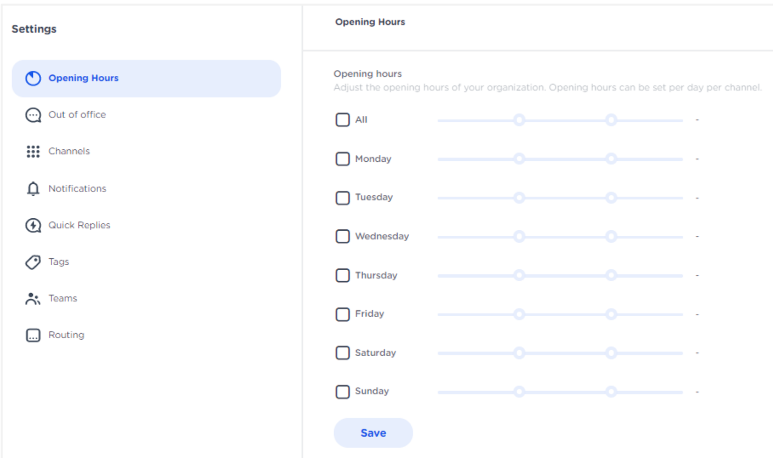


My Profile

In the My Profile page, you can see your avatar, preferred language, the time zone you are in and your role in the system. When you want to make changes, just follow the links and we direct you to the right source(s). The changes will directly reflect here.

Opening Hours

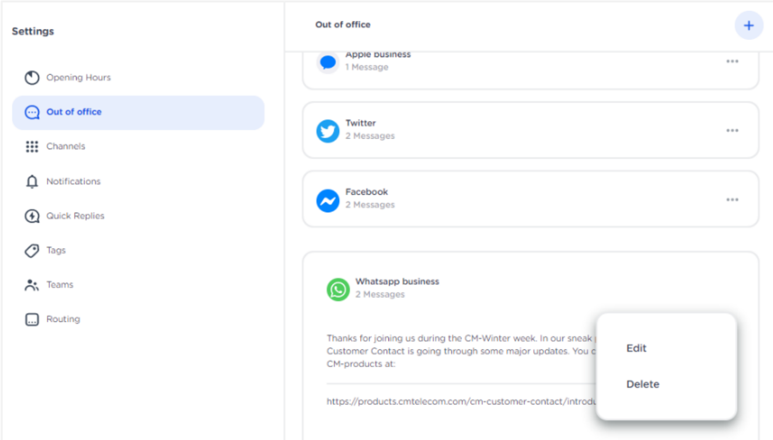
You might not always be present to answer incoming chats. To inform your customers when you are not available to answer a chat, you can set your opening hours. You need to do this per team. So you could set different teams whom handle different communications channels.



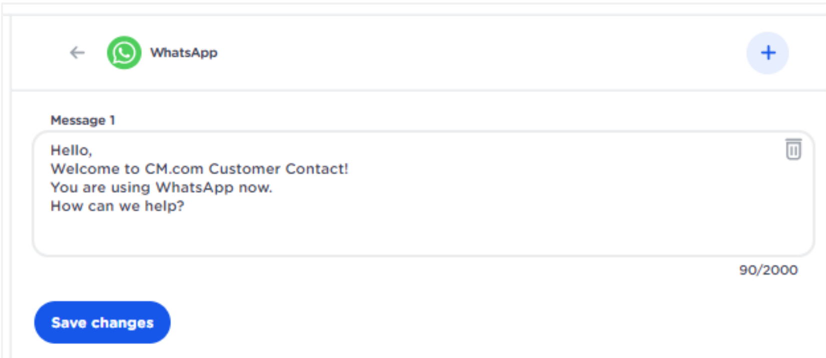
Out of Office

Nb. Only useful in combination with Opening Hours.

Customers expect your respond quickly, 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.



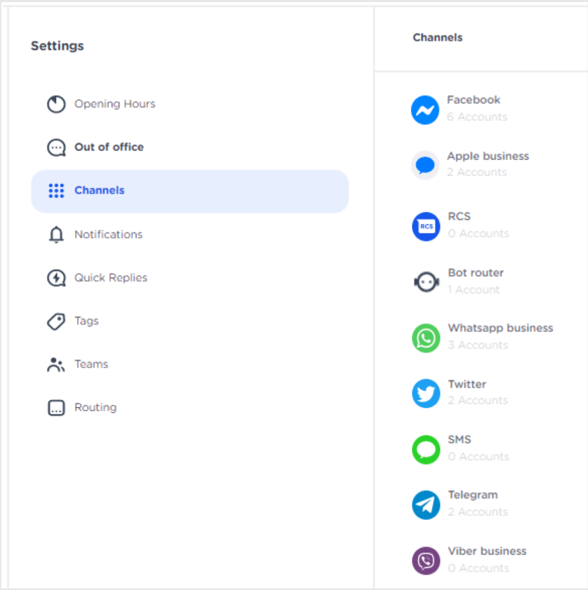
We advise you to add the out of office replies when you will be back in the office to pick up the support need. When other communication channels are supported 24/7, we suggest to add how those can be used to get support. Email addresses, phone numbers, and or a link to frequently asked questions or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



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.

Channels

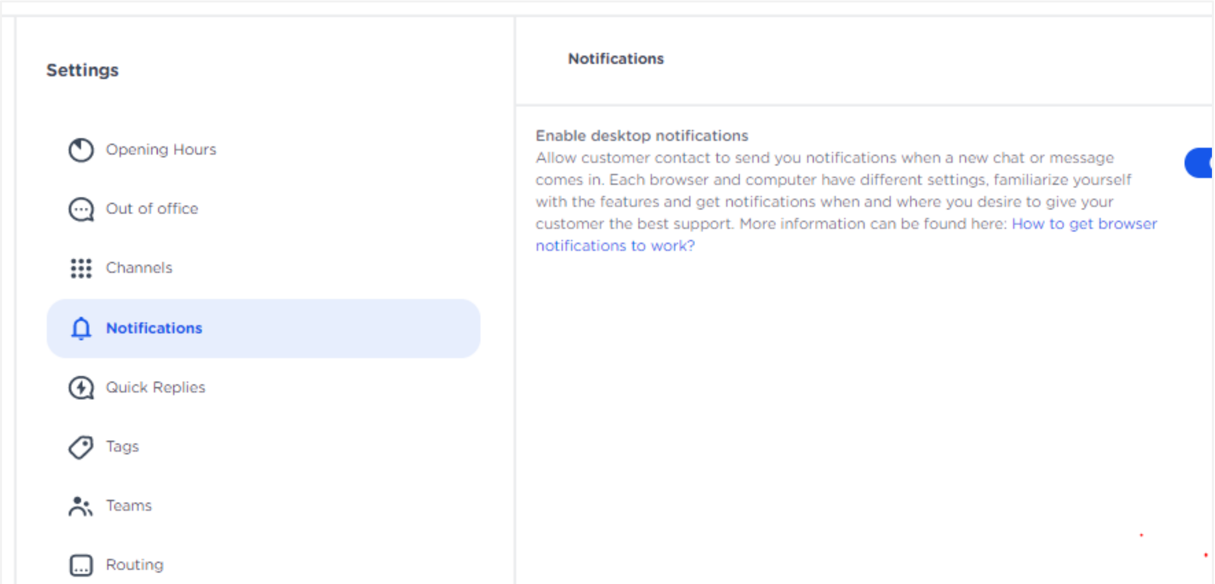
Via Channels, you can add and (de)activate the communication methods via which your customers can reach you. For Customer Contact to work, you need to configure at least 1 communication channel. The service providers of these communication channels all have different requirements, pricing structures and legal terms and conditions. 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.



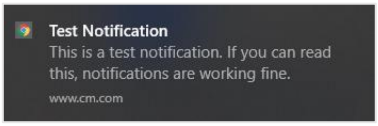
When you click on the channel you want to have access to, you will be informed about the steps you need to take. For the more complex set-up channels (like Apple Business Chat, WhatsApp Business, Viber and SMS) CM.com will help you with the activation. When you have more than one Channel activated you can see which channel is used in the conversation. Btw; you can also had multiple WhatsApp numbers, FaceBook pages an alike to your instance of Customer Contact. Please follow the same process with you request, the team will help you getting activated correctly.

Channel		Requirements
	Facebook Messenger	Self-service boarding
	Apple Business Chat	Onboarding process, via CM.com
	Viber	Onboarding process, via CM.com
	WhatsApp Business	Onboarding process, via CM.com
	Twitter	Self-service boarding
	Telegram	Self-service boarding
	SMS	Onboarding process, via CM.com
	RCS	Onboarding process, via CM.com
	Bot Router	Onboarding process, via CM.com

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. We have made a separate help center document explaining just how to get those notifications to work. You can test browser notifications, when they appear on the right bottom of your screen it works.



One highlight; in the top-bar we will change the icon, including a red exclamation mark when there are new conversations.

Quick Replies

More information about the quick replies. You can set-up an unlimited amount of pre-defined messages. To make sure that there is some order in your list, you can group them.

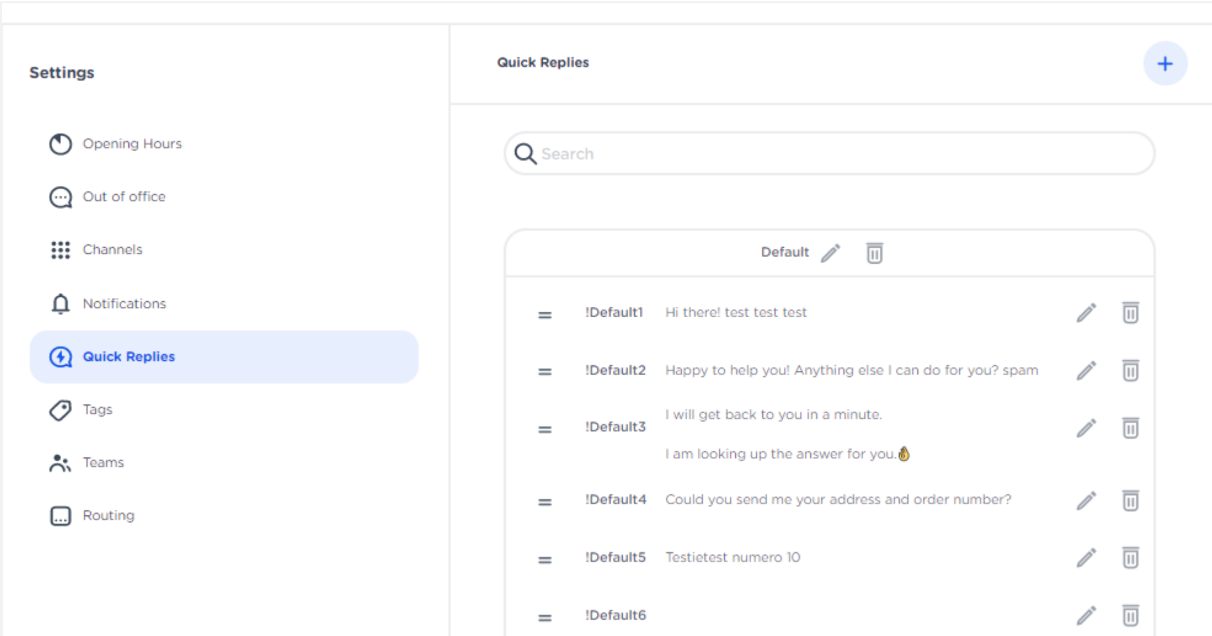
Via the PLUS sign you can create a new group. Based on the name you assign to the group, we also define how to have quick access to those groups once you are in a conversation/chat. You can change the name of the group any time, also your quick-access keys will change.

Once you have created a group you can add your predefined answers to that group. Here you can add links to useful content. The formatting of the quick reply will be taken into consideration once you send the message. Thus emojis remain, so does the Enter feature to leave space in between text, which keeps longer messages readable.

TIPS:

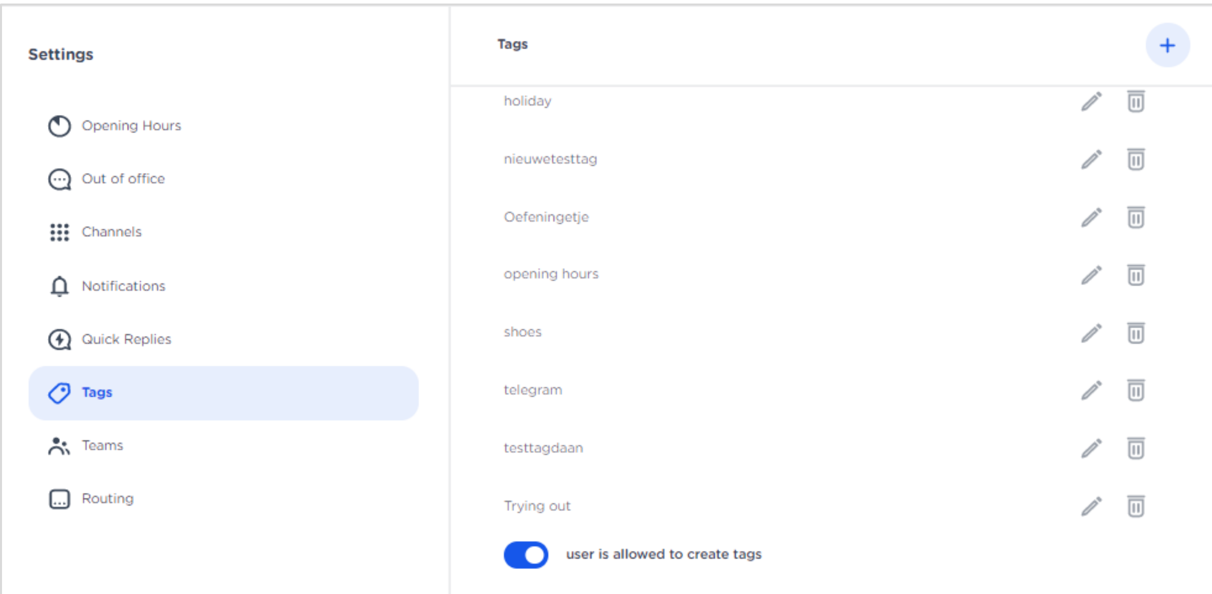
- The limit of one quick reply is set to 2000 characters. But please think about what is useful to receive.

- Add a quick reply to close a conversation nicely as well.
- It might be nice to send a customer a survey and ask for their feedback. (CM also offers this tool-kit).

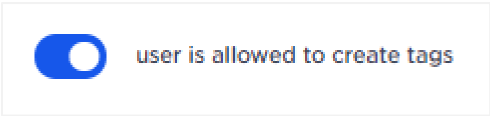


Tag Management

Incoming chats can be tagged. This helps you when you archive them and later on want to find something again. Tags are different per organization. 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.



Some organizations do (not) want that their agents add more tags. If below button is Blue, agents can add tags while archiving the conversation. When it is grey they cannot.



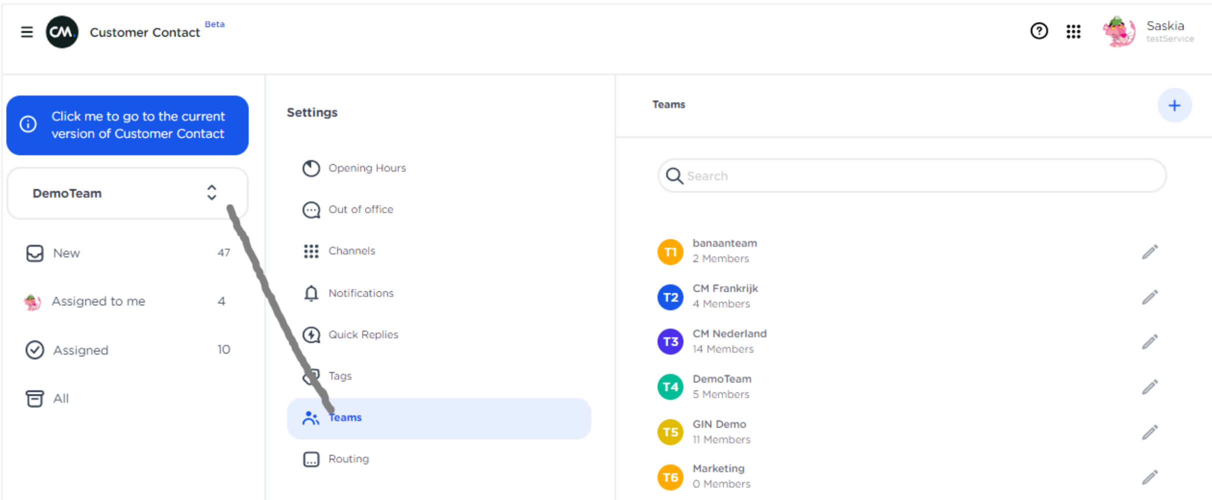
Teams

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.

Once you have been granted access to more than one team, at the left side of your menu the selection option for Teams Selection becomes available. Here you can switch between teams when required.

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.

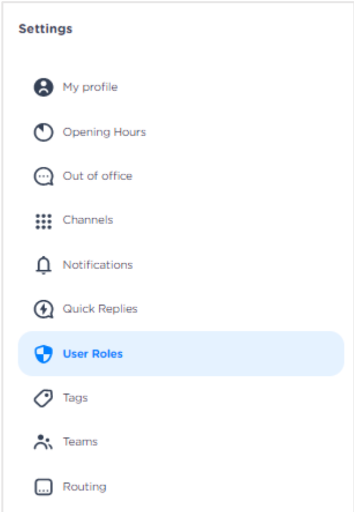
User Rights

Within the system we distinguish multiple user roles. We have 3 role types:

1. Administrator – who can see and act on all incoming conversations, has access to statistics and can adjust the system settings (paid role)

2. Agent – can pick-up and assign conversations, work on his own chats, and help out his colleagues (paid role). Has no access to system settings

3. Watcher – has the right to read what is happening in the system, to improve processes; usually applied to busines analysist or super visors (free of charge)



Note: With the implementation of user rights all existing users will have the administrator role. This means they can see and do what they were able to do before the implementation of user rights. You can down-grade their rights by changing their role.

	Administrator	Agent	Watcher
Manage the Conversation	Yes, can pick-up and answer chats. Can start the conversation too.	Yes, can pick-up and answer chats. Can start the conversation too.	No
Assign conversations	Yes, to himself and others	Yes, to himself and others	No
Settings	Has access and is allowed to make changes	No access	Has access and can read what has been configured
Statistics	Yes, can view and export what been worked on	No access	Yes, can view and export what been worked on
Scope	Entire Account	His own work, and work that is assigned to others in the team	Entire Account

Statistics

Administrators and Watchers can see what the trends are when it comes to providing services via Customer Contact. Those trends can help improve your teams happiness, performance and your customer journey and satisfaction. Apply a filter, and the page will update. The filter is taking into account your time zone.

In Statistics you can see:

1. Number of conversations, over time
2. Insights on most used Tags
3. Usage of Channels over time and %
4. Activity per Agent
5. And Always insight in the current occupancy