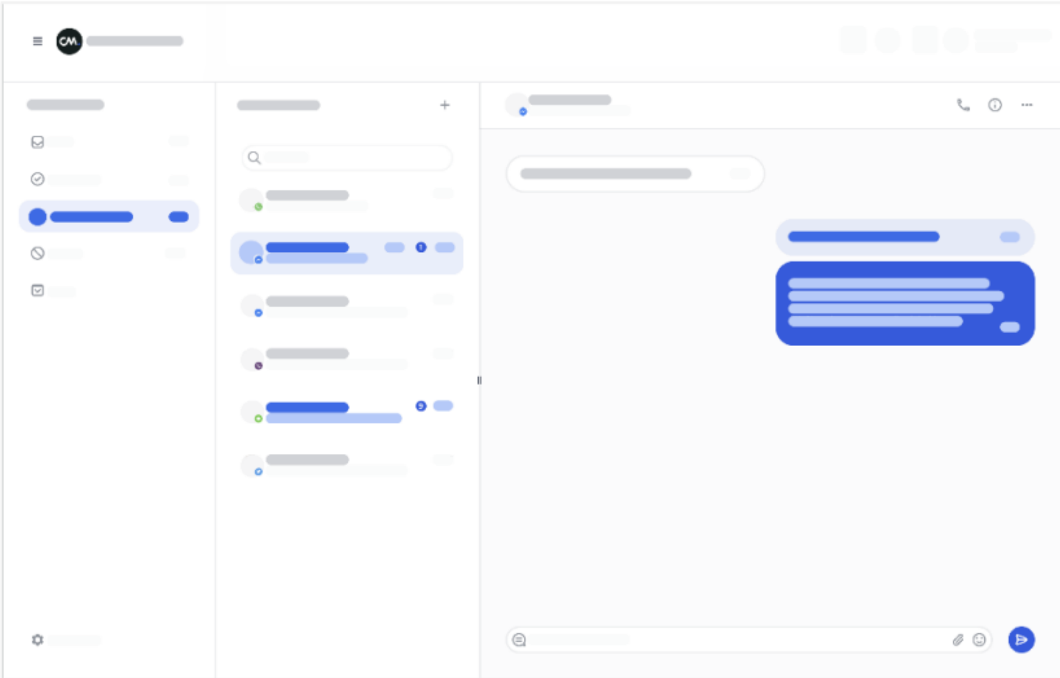
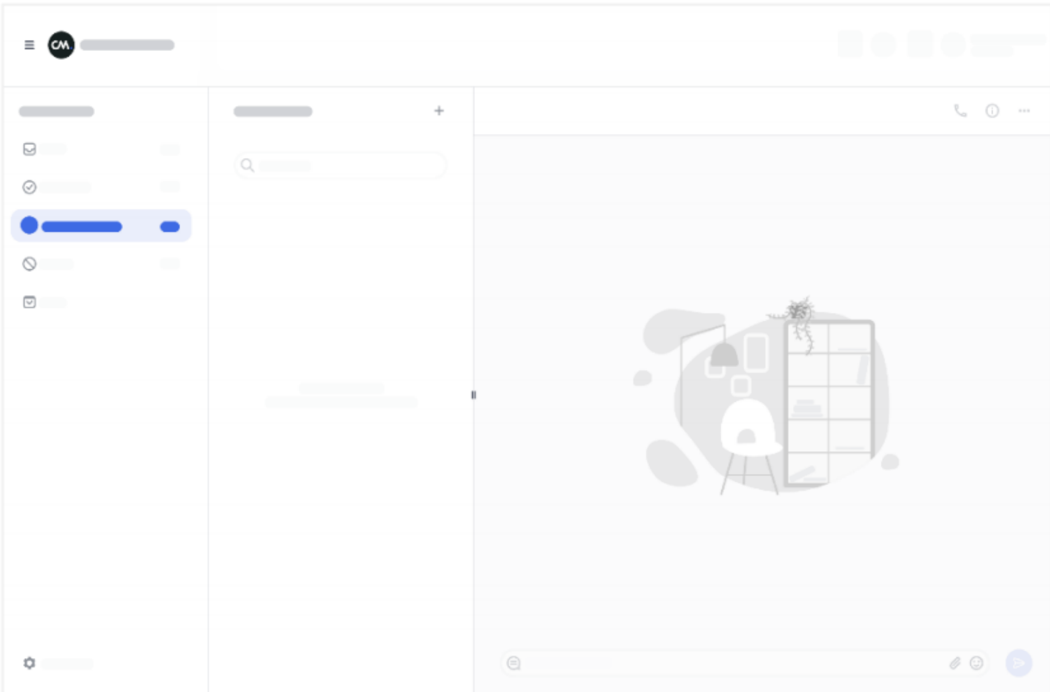
Customer Contact User Guide





CM.com
September 2021

Content:

General

This implementation guide will explain how to use CM.com's Customer Contact application, part of Mobile Service Cloud basic. 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 quickly as possible. Quite the challenge.

Our customer contact solution makes their lives much easier by combining these processes in one interface. This results in decreasing the time spent to help each customer and thus boosts customer satisfaction.

From one single customer care window, you can combine different messaging channels like SMS, Viber, Telegram, Twitter, Messenger and Apple. 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

Do 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 out Multi-Channel Messaging page for more information.

Need support?

The CM.com support team is there to help you. Checkout our online customer support section. Should you have any questions or need clarification, please contact us via our website, CM.com or via Support@cm.com.

Our CM support team also makes use of our own Mobile Service Cloud application, hence you can reach them via multiple messaging channels.

Complementary products

Complementary products you might want to check out:

- Mobile Service Cloud Pro and Advanced provide even more features than our Basic offering. Advanced analytics, conversion tracking, multi team collaboration etc.
- CM Campaigns helps you send out messages to large batches of users (up to 2 million). Send notifications, marketing messages or information about your newest items, campaigns, etc.
- Is the implementation of messaging such a success that you need help of a chatbot? Then please contact our Customer Success team via: Conversational@cm.com.

How do users find you?

How a conversation starts depends on where you have informed your customers about how to contact you. They might search for your name on the web and find a phone number, QR Code or a link to a Chat app. Or maybe it starts via documents you have shared with them, a booking conformation 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

Get started

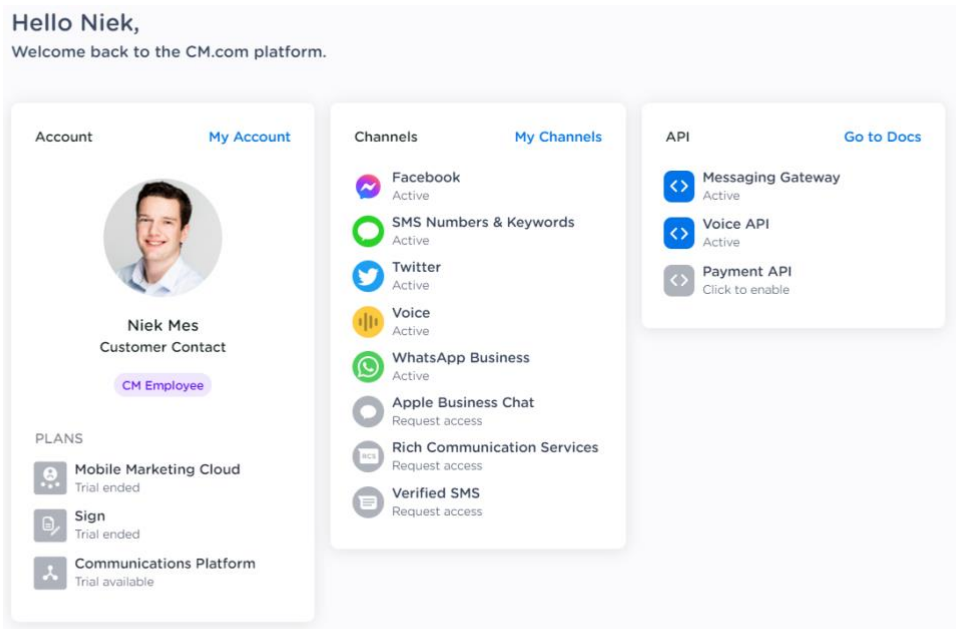
Access to the application: Please [Register] to our platform. If you already have a CM.com account, then [log in].

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.

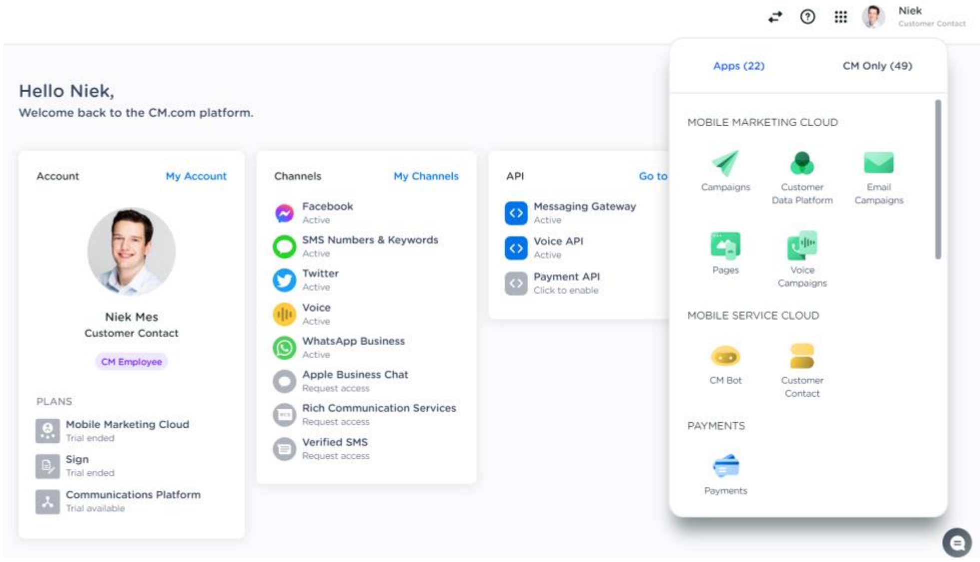
The  icon navigates you to the Help Center where you can find an answer on many frequently asked questions.

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

Via your profile image you can always find your organization’s profile. It helps you to navigate through information like your organization’s financials and core settings.



In this overview you can see all the currently active channels.

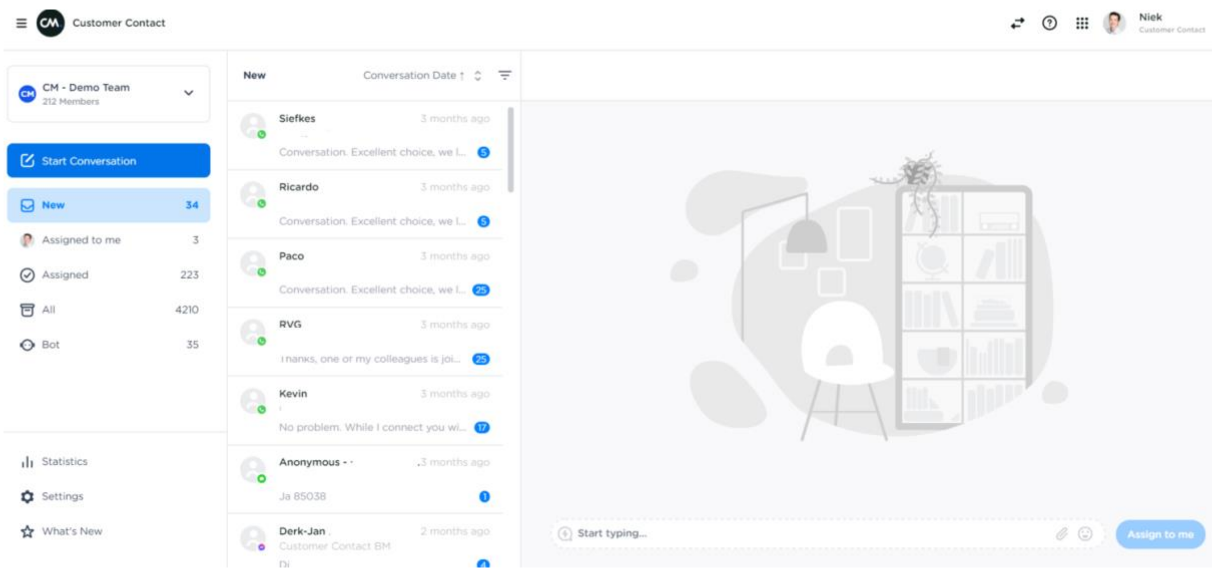


All available applications can be found when you click on

the icon.

Now search for and click on the Customer Contact Application.

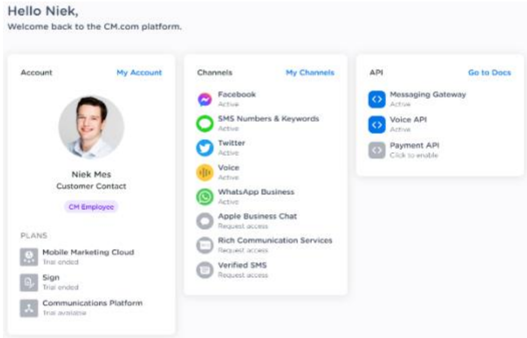
Once requested, we install Customer Contact on your online profile, but nothing will be installed on your PC. A small onboarding tutorial is provided that will educate you on the most important features of the chat-system and help you with the navigation. That 'New', 'Assigned to me', 'Assigned' and 'All' tabs are explained so you can get started right away and know how to navigate back to those items when required.

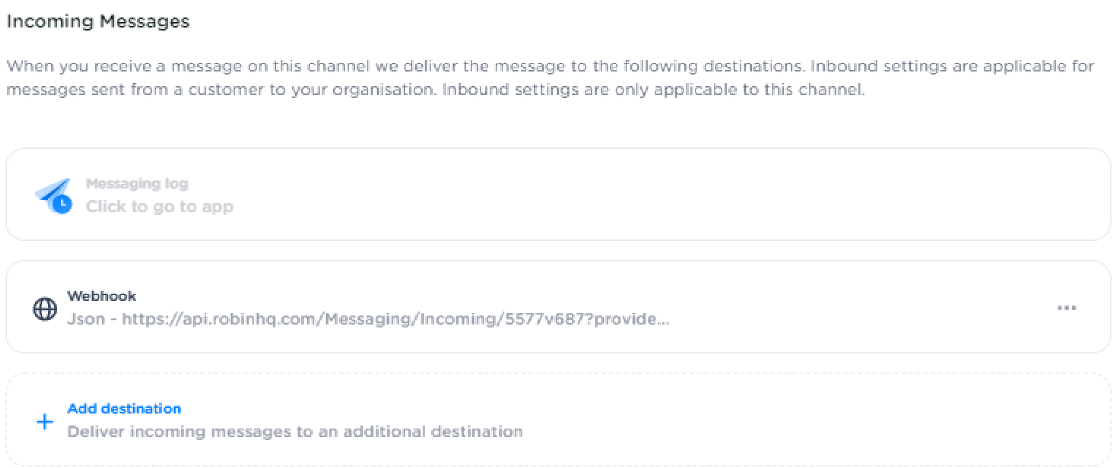


More questions about your CM.com account ? Consult the online help.

Incoming messages

As a Customer Contact user, when you make use of WhatsApp for Business, Apple Business Chat or SMS, we install those communication channels for you. This configuration is found in the [Channels]() overview where you can find the overall configuration of those communication channels. You should see Customer Contact as a destination for “Incoming messages” of a channel.



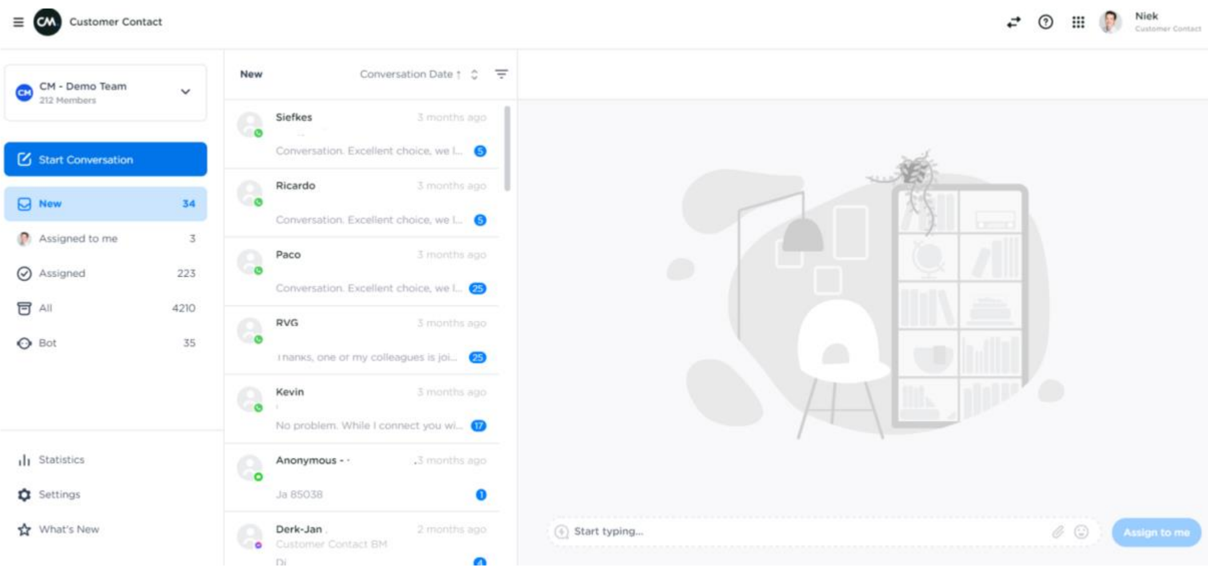


Conversations

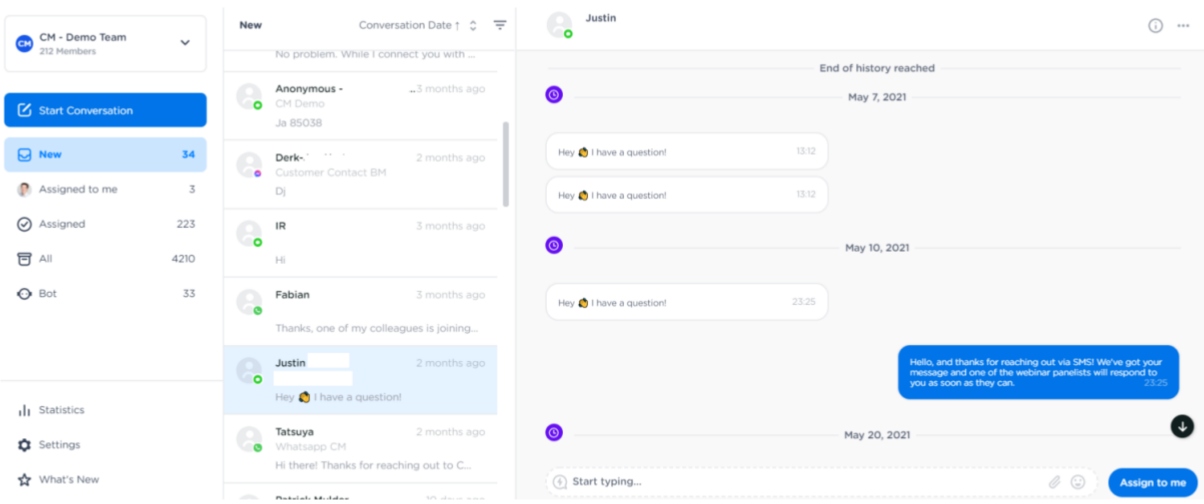
You have completed the setup. Now, whenever a consumer starts a conversation, the new conversations are sent to CM Customer Contact, specifically to the “New” section, but there are several more sections you should know about.

New conversations

In the first section 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.



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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 the ‘Assigned to me’ inbox. Clicking the ‘Assign to me’ button removes the conversation from the general ‘New’ inbox and you are now the only person who can handle the conversation. Once you finish the conversation, choose ‘Archive’ from the menu to indicate you completed the interaction with the consumer.

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.

Your assigned conversations

Messages in the `Assigned to me` category are messages that you are responsible for handling. You can reply, re-assign and archive the conversations.

Assigned conversations

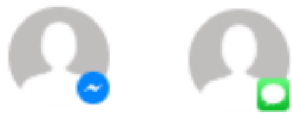
Once assigned, conversations are no longer available in the shared inbox known as ‘New’. To keep an overview on the assigned work within your Team, active conversations are available in the ‘Assigned’ tab. Use the filter and select an agent to quickly see all the conversations assigned to an agent.

All conversations

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

Archived messages can also be found in this section. When archiving a conversation, you can also assign a tag to it. This makes it easier to find the conversation or view statistics about multiple conversations.

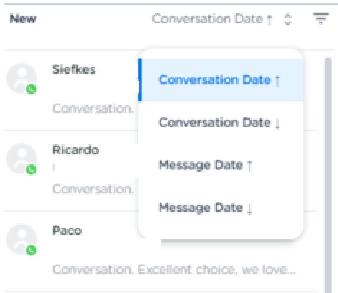
Conversation lists



When switching between the conversation categories, each opens its own conversation list. You can see who send the messages, the channel it arrived from, time and a small preview. 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. The list provides features for sorting and filtering too.

Sorting

We sort the conversations / messages based on the time they were received by the system. The oldest conversations are on top because you want to reduce those response times.



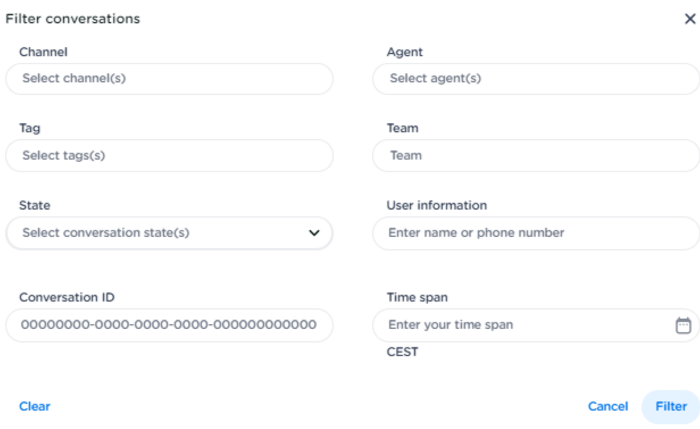
You can alter your sorting by:

- **Conversation date**: Sort by either descending or ascending conversation according to their date
- **Message date***:* Sort by either descending or ascending messages according to their date

Filtering

Click on the icon to open the 'Filter conversation' dialog. Here you can select from many options to filter the list of conversation.

Filter options:



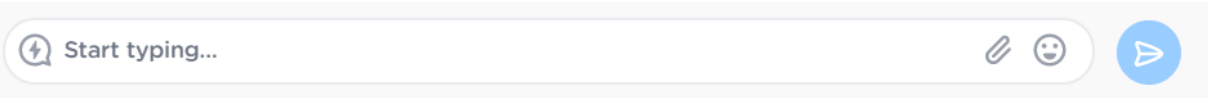
- **Channel**: Via which communication channel the messages arrived.
- **Agent**: You or one of your coworkers
- **Tag**: Tags are the labels you marked a conversation with for analysis purpose.
- **Team**: Your own or one of your coworkers' team.
- **State**: Select the state of the conversation (e.g. 'new' or 'assigned').
- **User information**: Search by name or id of the consumer.
- **Conversation ID**: Search by the conversation ID if you are looking for a specific conversation.
- **Time span**: At what time the conversation happened.

Conversation actions

A conversation can be summarized by the steps: New, Assign, Reply and lastly Archive. Once you have assigned a conversation to yourself it is time to reply and really get the conversation started!

Reply

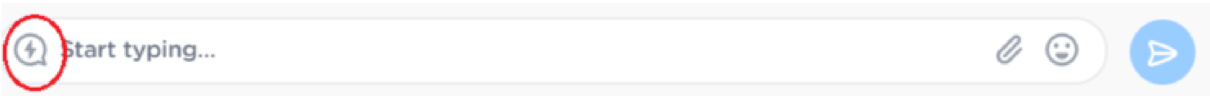
Via the lower area of the screen, you can type and send your reply. You can send your response either via clicking on the send icon, or by pressing 'Enter'. The system will automatically send this message back via the communication channel in which your customer has initiated the conversation.



Note: For some communication channels like WhatsApp and Facebook Messenger it is not always possible to reply at certain times. In these cases the reply button will be disabled and a warning message will be shown to the agent. See also Conversation window.

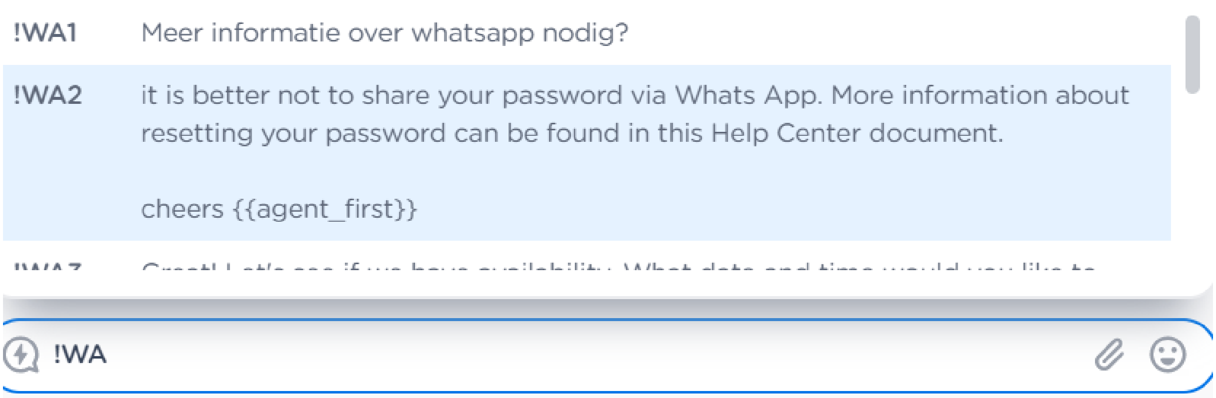
Quick replies

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



When you click on the lightning-bubble in the reply bar, a pop-up will appear with all your quick replies. When you have grouped your quick replies, click on the category, and through until you have found a suitable answer. This menu works with tab, arrows (up and down), enter and your mouse as well.

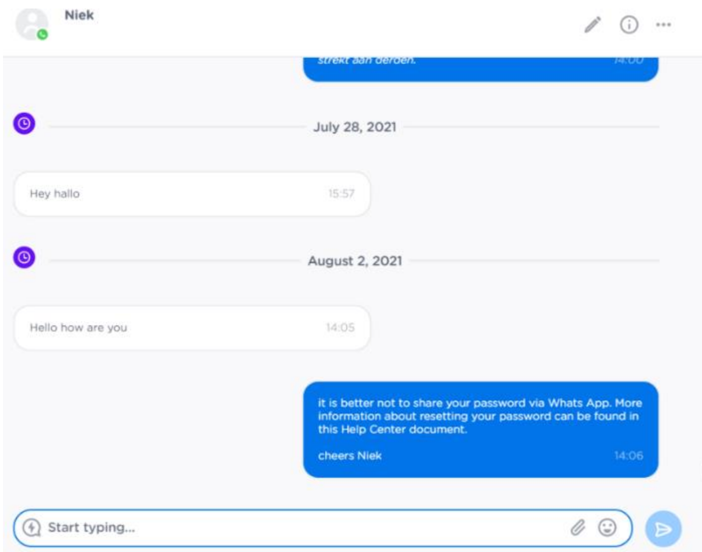
Additionally, each group can be called for by using the exclamation mark in the text bar. When you continue typing to find your matching answer and click enter. This is a great way to speed up your workflow.



In the example above we are in the group 'WA' (!WA) messages.

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

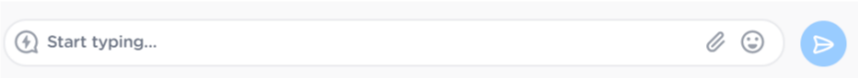
When a quick reply has placeholder values, like {{agent_first}}, those will be automatically filled with the known information from the chat. When the system is not able to identify the value, it will be marked red, and the ‘Send’ button is de-activated to protect you from sending incorrect information.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

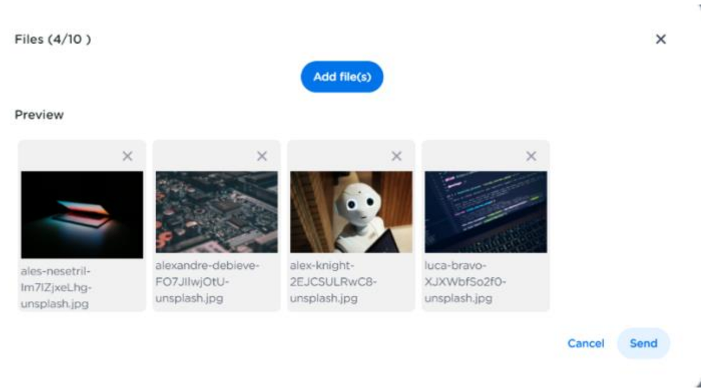


In the example (!WA2), the agent is called ‘Niek’, and in the quick reply there was a placeholder value {{agent_first}} thus *Niek*.

Sending more than text

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

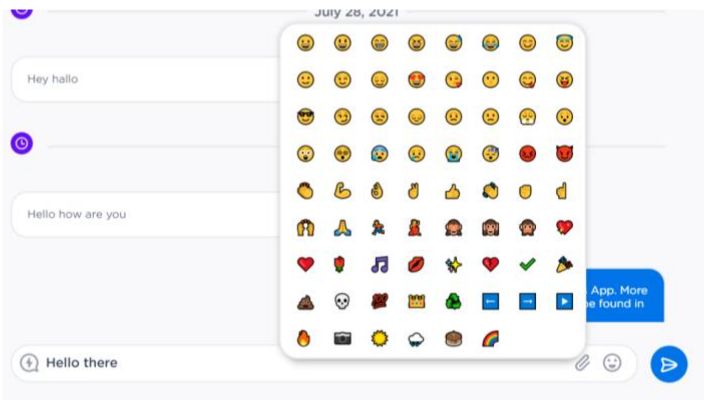




To avoid sending incorrect information, there is a preview panel that opens after you have selected a file. You can add up to 10 files at the same time.

Note that not all communication channels support receiving/submitting each kind of file type. We will inform you upfront what will work and what will not, preventing you from sending information no-one can receive or view.

Sending a smiley 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

Sometimes messages cannot be delivered. There can be several reasons for this. Most likely it is related to one of these reasons:

- You do not have a working Internet connection
- 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 its internet connection (we will try to deliver the message for 24hrs)

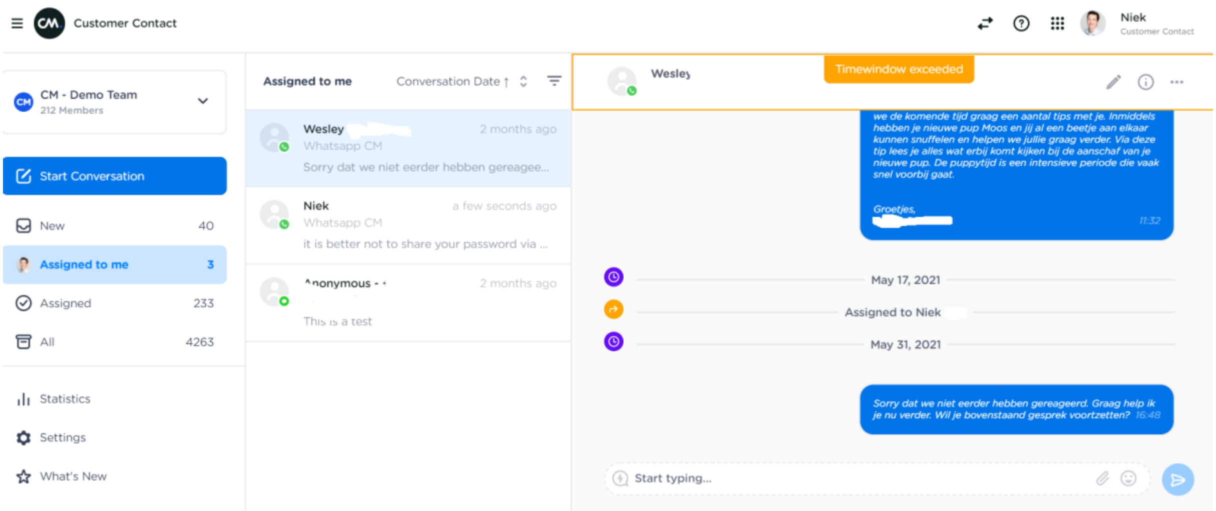
Possible fixes*: crtl+f5, log out and login, try another internet-connection. (Check the message log for errors). reach out to support if issue is persistent.*

Conversation (reply) window

Each chat app (WhatsApp Business, Apple Business Chat or 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 must reach out to consumers within 24hrs after they contact you. This is calculated from the last message the consumer has sent to you. Obviously, this is not so handy when it is the weekend or a bank holiday.

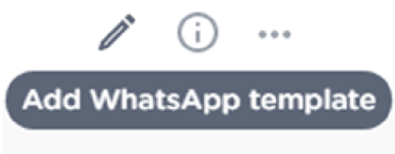
When this window is exceeded, you can only respond with message templates. More information about those rules can be found in the Help Center and specific chat app documentation. We will help you detect when sending a templated message is required. In below example you can see that the conversation window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



WhatsApp templates

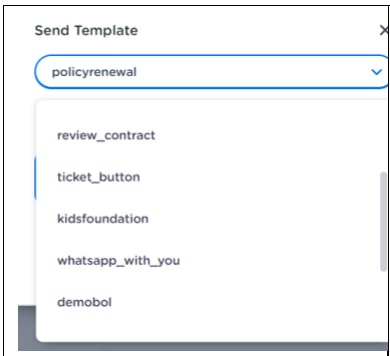
When you receive messages via WhatsApp and the conversational window closed, you can only contact your customers via an approved template message. Those messages have been registered by someone in your organization via the CM.com Channels application and have been approved by Facebook/WhatsApp. To see how you can create a WhatsApp template, click here.

You can see which templated messages you can send from Customer Contact when you click on the 'pencil' icon in the top right of a conversation.

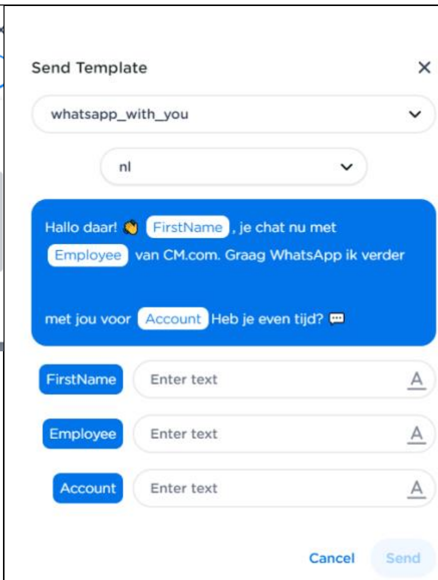


A pop-up will appear in which you can find and select all templates available. When templates are available in various languages, you can select a specific language.

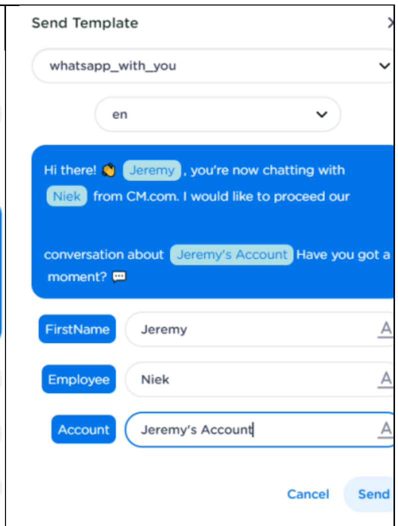
There might be fields which you need to specify, like dates, an amount, or a name. Those will be highlighted in blue. To adjust the content of those place holder fields you can enter the information in the respective fields underneath the message. Once you have entered the information, your input will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



Select template

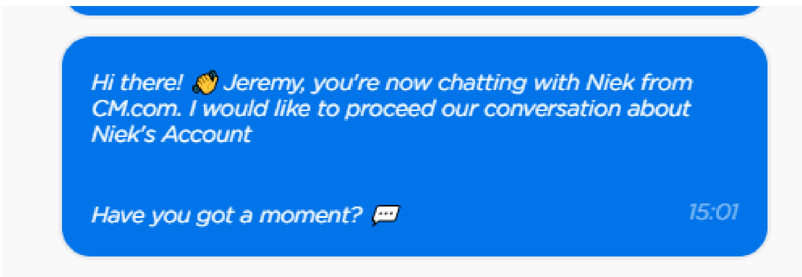


Fill in missing fields

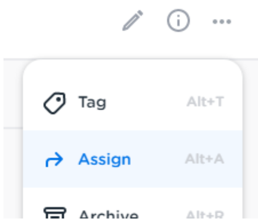


Send the message

When you click on ‘Send’, the message will be sent to the user. Once the user has replied, the conversation window is considered open for another 24 hours and you can send normal text and/or media messages again.

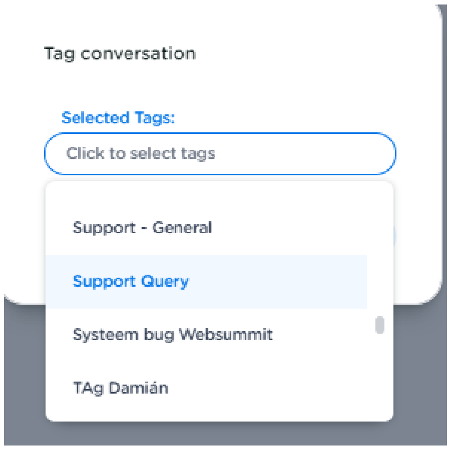


Reassign



You might find yourself in need of the expertise of a colleague. Or you might want to transfer a customer to the colleague that works the next shift. You can use the 'Assign' button from the actions dropdown menu.

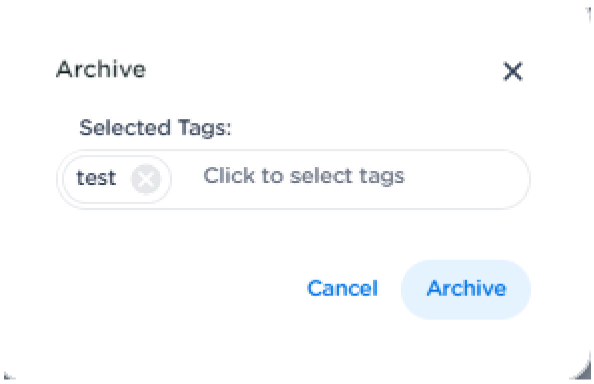
Tags



The questions you receive from your customers likely have something in common or can be group. 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. Tags can also be used in search, 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 'Archive'. You can find this feature under the 'three dots' icon.

When you archive a conversation you can also assign tags to it.

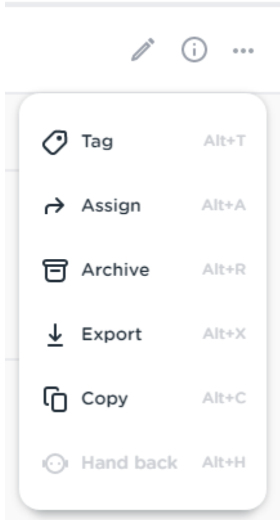
After you archive a conversation, you can find it again the 'All' section. Use the filters to quickly find all your archived conversation.

Download

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. The notes are included in the export.

Action shortcuts

The actions in the actions drop-down can also be called using shortcuts on your keyboard. The keyboard shortcut key combinations are visible next to each action.

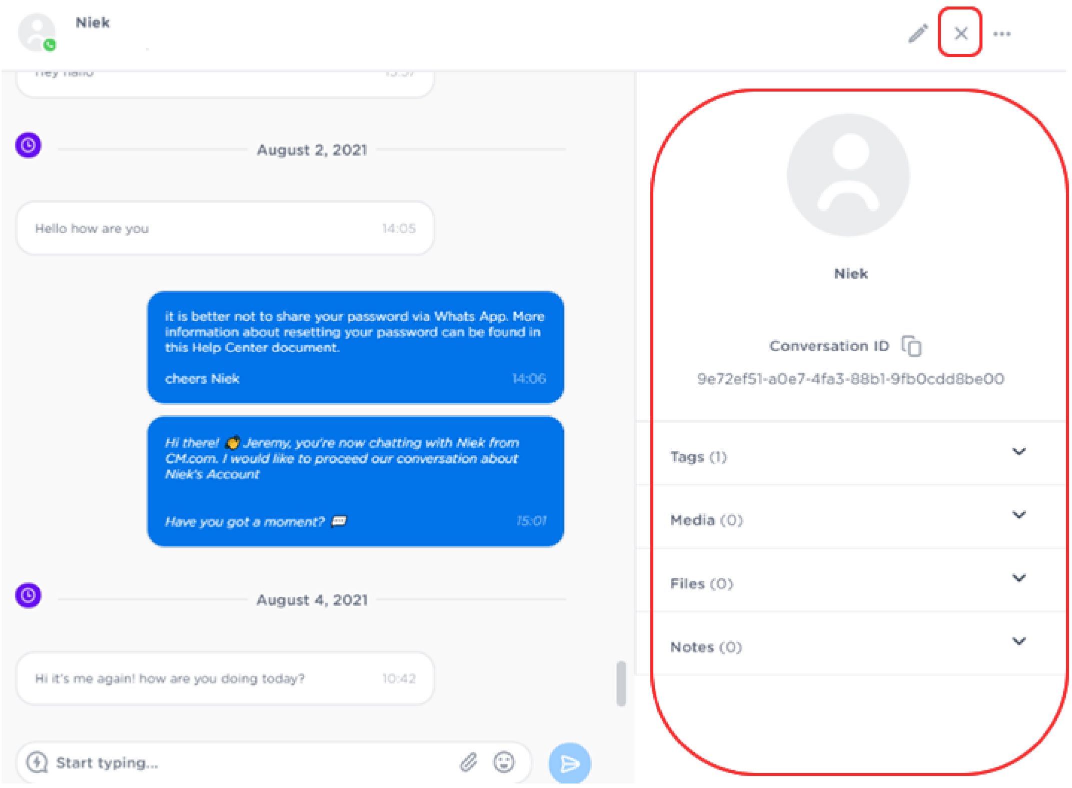


Notes/Files and more information

When you would like to add notes to a conversation you can do this via the ⓘ symbol and clicking the ‘Notes’ section. Notes will be available to this conversation and when you export the conversation, the notes are included in the export.

In the same area you can also find more information about the tags, media and other files that accompany this conversation.

To close the panel, click on the ✕ symbol.

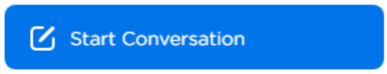


Start the conversation

There are circumstances where you would like to start a conversation, and not wait until someone contacts you. You can do this by clicking on the 'Start Conversation' button.

Step 1. Click on Start Conversation

Click the button and we will guide you through the steps needed to send a message and start the conversation.



Step 2. Select the channels

You need to select which communication channel you want to use to reach out to your customer. A drop-down list is provided with your active communication channels and the channel accounts. Not all communication channels allow for agents to contact a consumer.

Step 3. Select contact

Next you need to select a customer contact. Use the address book group drop-down or the search box to select the contact. If you can't find the contact in the address book you can simply type the phone number of the contact and go to the next step.

Note about adding multiple contacts to Customer Contact:

- 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 that you can personalize with the use of variable fields. 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 of the communication platforms or be blocked by the user!

Overview of the process steps:

<table>
<tr><th>Select Channel</th><th>Select contact</th><th>Enter message</th><th>Send</th></tr>
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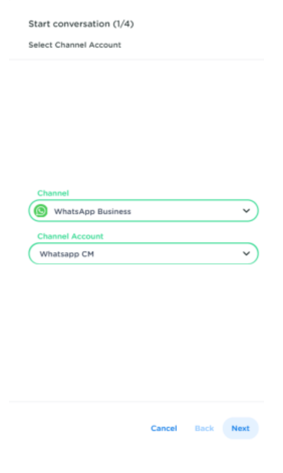
<td>
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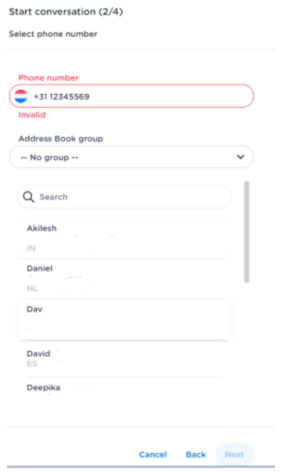
<td>
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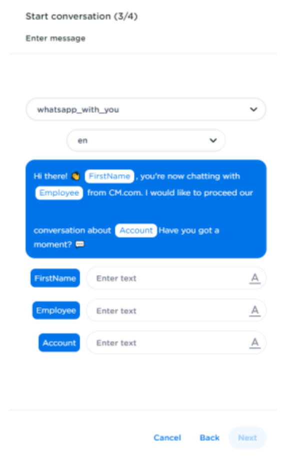
<td>
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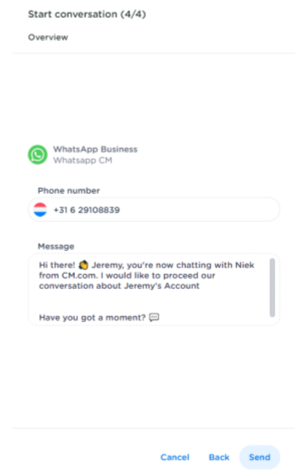
<td>
</td>
</tr>
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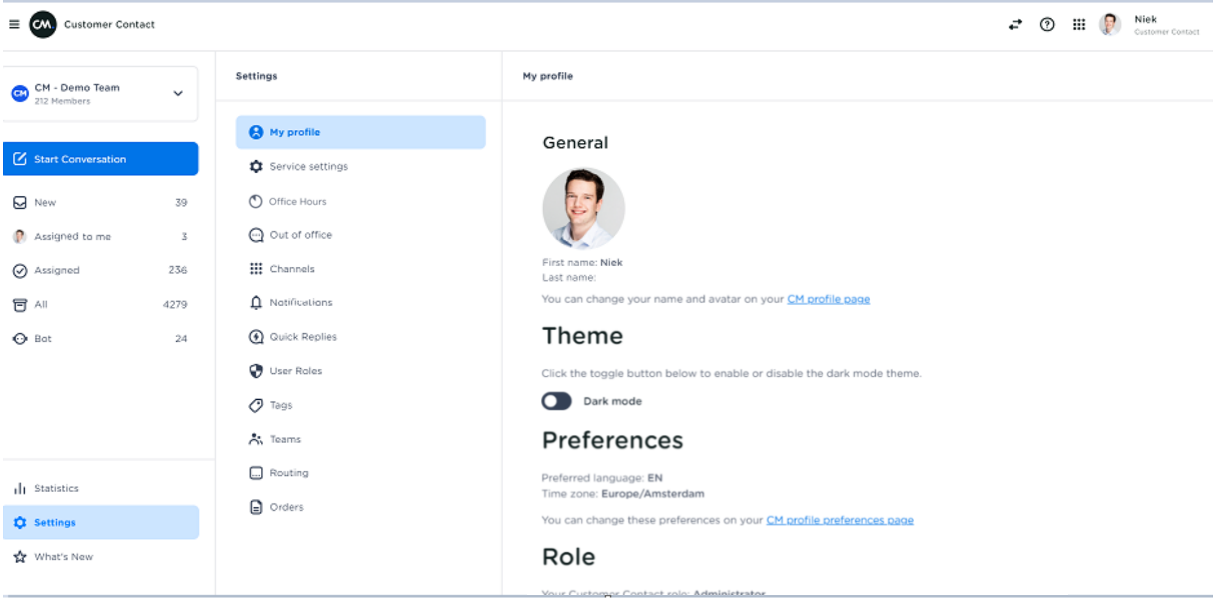
Once you clicked Send, the message is sent and the conversation appears in your own overview – ‘Assigned to me’. If the channel has a conversation window, this conversation window opens after the consumer responded, and you can continue the conversation.

Settings

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



My profile

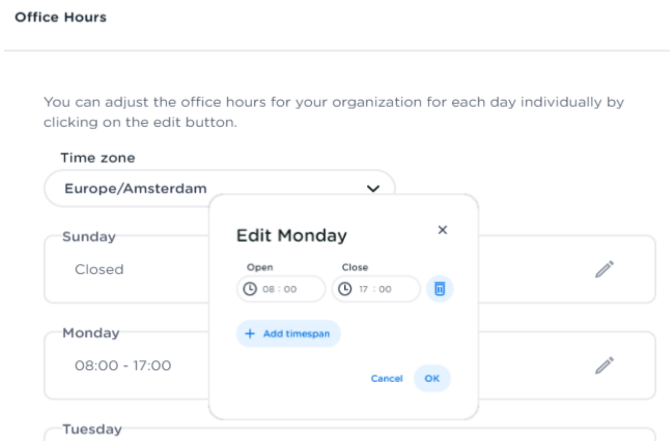
In the 'My profile' page, you can see your avatar, preferred language, the time zone and your role in the system. When you want to make changes, just follow the links and we direct you to the right source(s). The changes will directly reflect here. You can also change your theme to 'Dark mode' and reset all the customer contact tutorials.

Service settings (Admin only)

You might want to change some service settings for your agents. That is possible and can be done when you click the 'Service settings' button. Here you can change settings that affect what your agents can and cannot view or change in Customer Contact. You can also specify whether you want to automatically delete old messages.

Office 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 office hours. When not set, you are always open for business.

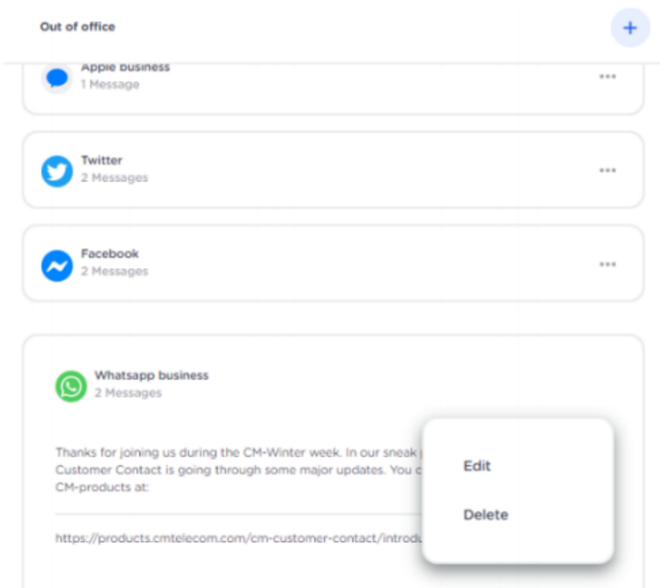


Out of office

This is only useful in combination with 'Office hours'.

Customers expect that you respond quickly. When you are not around, you can send automatic replies. These will only be sent once you receive messages outside your office hours. You need to create messages for each of your communication channels.

We advise you to add a message about when you will be back in the office to pick up the support need. When other communication channels are supported 24/7, we suggest adding 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: Office 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.

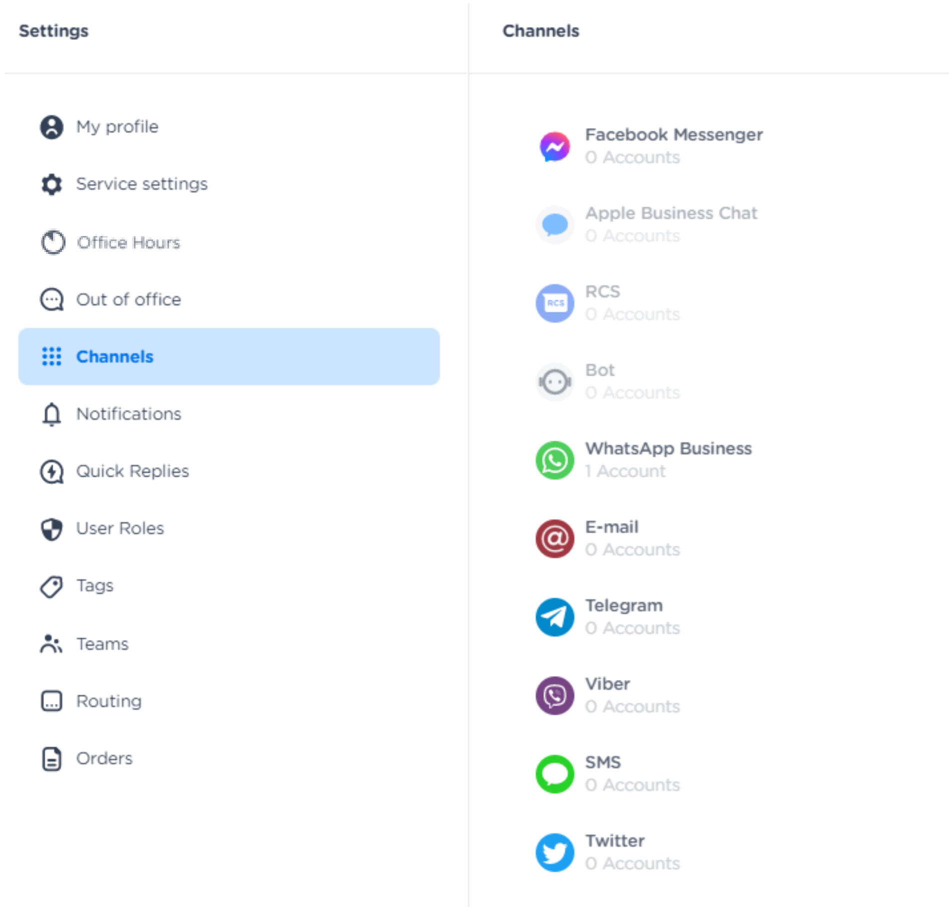
Channels

Via 'channels' you can view, modify, 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. Don't hesitate to contact our team if you need support via conversational@cm.com, we have done this before.

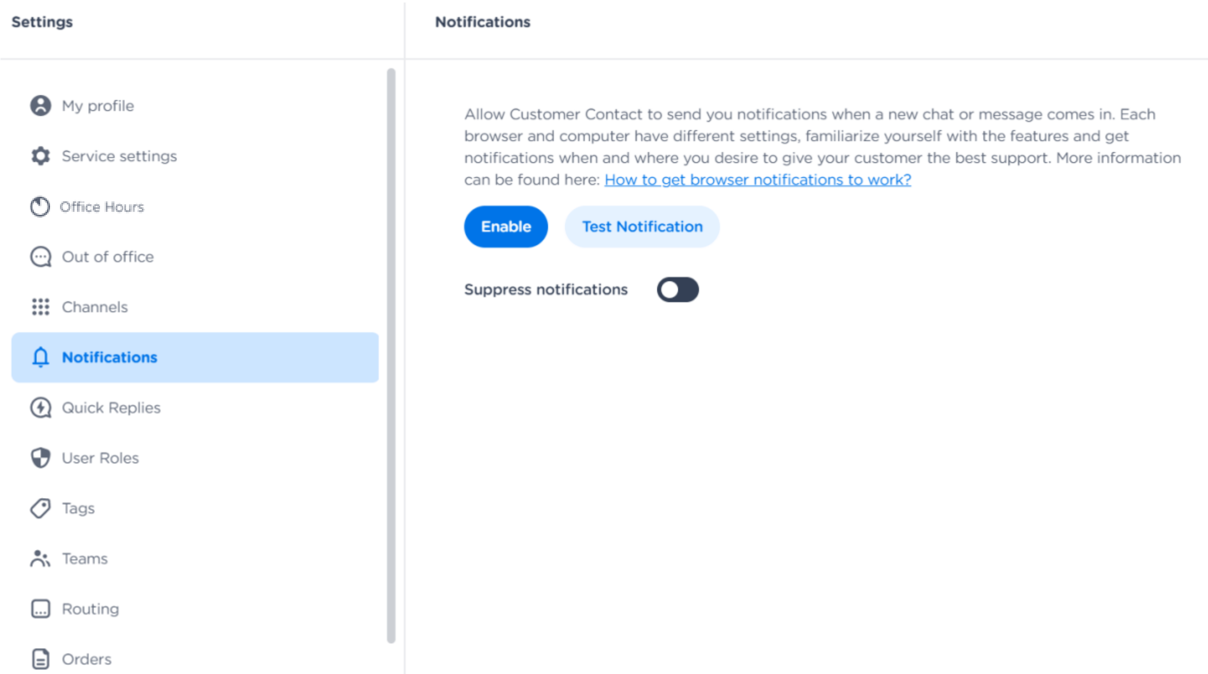
When you click on the channel you want to have access to, you will be informed about the steps you need to take. For the more complex channel set-ups (like Apple Business Chat, WhatsApp Business, Viber and SMS) CM.com will help you with the activation. When you have more than one Channel activated you can see which channel is used in the conversation.

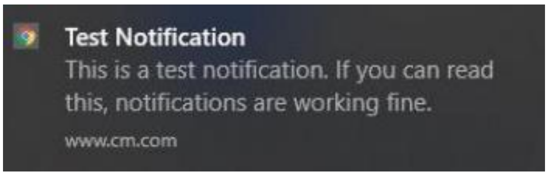
Feature highlight: you can also have multiple WhatsApp numbers, Facebook pages, etc. added to your instance of Customer Contact. Just follow the same process with your request and our team will help you get it activated correctly.



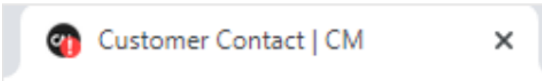
Channel		Requirements
	Facebook Messenger	Self-service onboarding, via Channels app
	Apple Business Chat	Onboarding process, via CM.com
	Viber	Onboarding process, via CM.com
	WhatsApp Business	Onboarding process, via CM.com
	Twitter	Self-service onboarding, via Channels app.
	Telegram	Self-service onboarding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

Notifications





When new chats are appearing to your inbound overview, a customer needs your help. To grab your attention, you can set-up desktop notifications that appear on the right bottom of your screen. You need to set this for each browser via which you access Customer Contact. We have made a separate help center document explaining just how to get these notifications working in your browsers.



Feature highlight: In the top bar we will change the icon to include a red exclamation mark when there are new conversations.

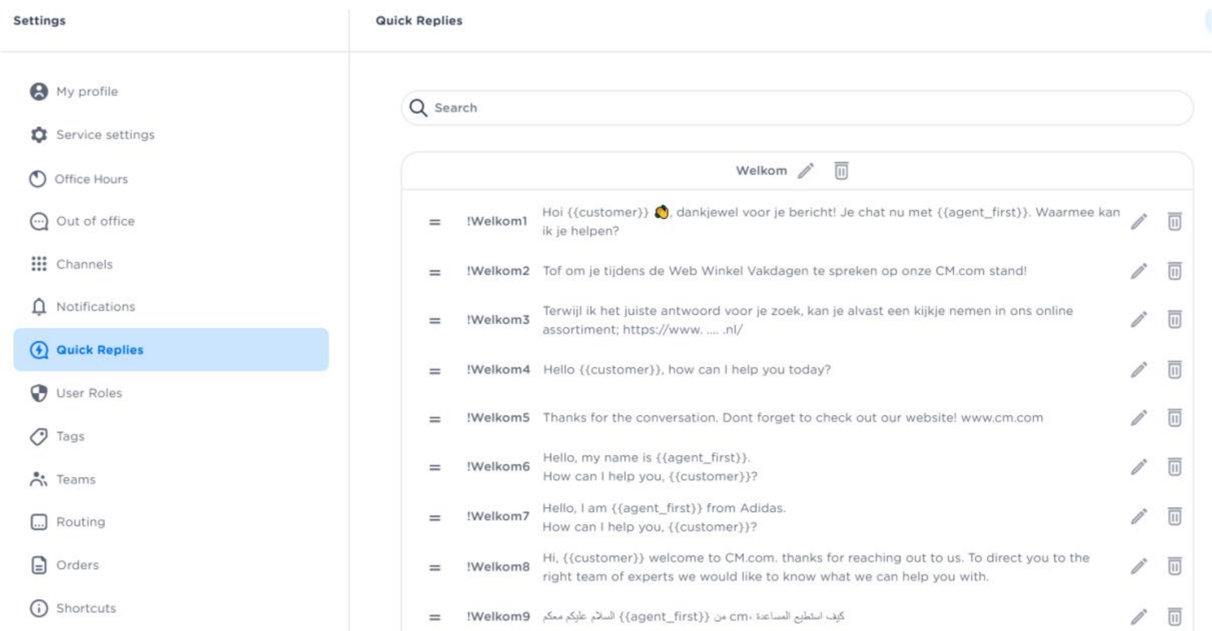
Quick Replies

You can set-up an unlimited number of predefined quick reply messages. You can also group them to make sure that there is some order in your list. Via the + 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 and your shortcut commands for the reply bar will change accordingly.

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. Emojis remain, so does the ‘enter’ feature to leave space in between text, which keeps longer messages readable.

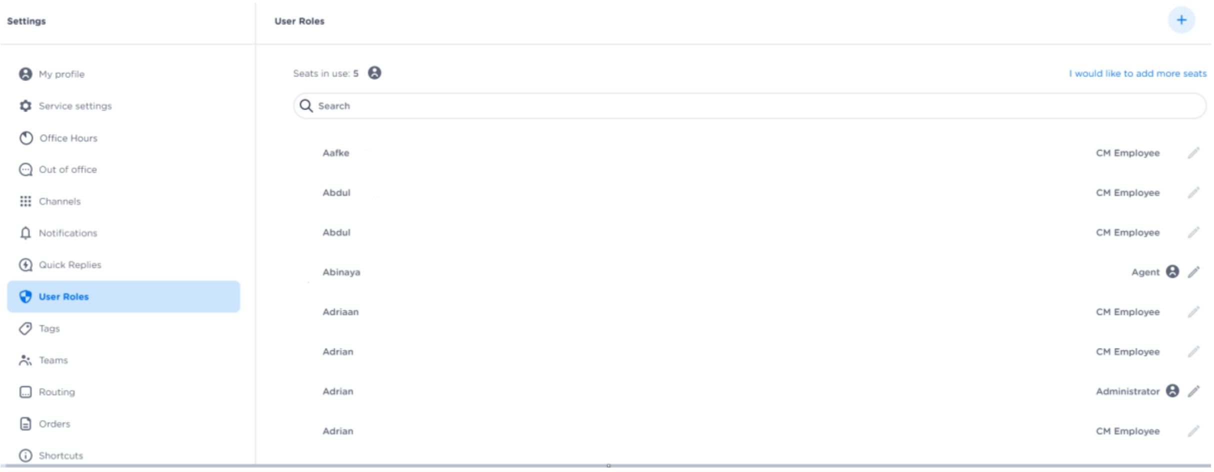
Tips:

- 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 toolkit in our [Mobile Marketing Cloud] solution.



User Roles

In this menu it is possible to see and for administrators to change the user roles of all the colleagues that work with Customer Contact and see the number of seats that are currently in use. Use the search box to quickly find a user in the system. Clicking the plus icon will redirect you to the 'Users' section of your CM account management where you can invite new users.

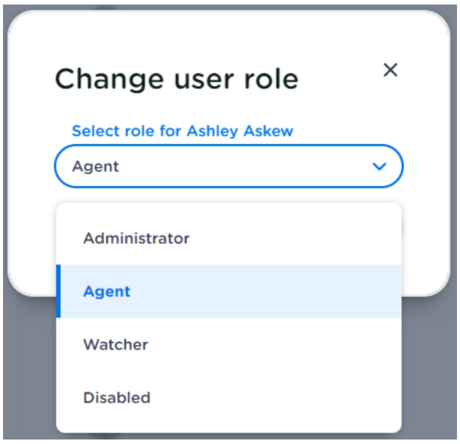


Seats

You have a limited number of seats based on the orders that you have placed. Administrators and Agents require a seat. New users automatically become an Agent if you still have open seats. Without an open seat they become Watcher.

Clicking the 'I would like to add more seats' link in the User Role settings page, will redirect you to a sales page where you can order more seats.

Your seats can be allotted by changing a user's role. To change a user's role, click on the pencil icon next to the user role. Select a role from the drop-down menu and click 'OK'.



The available User Roles are:

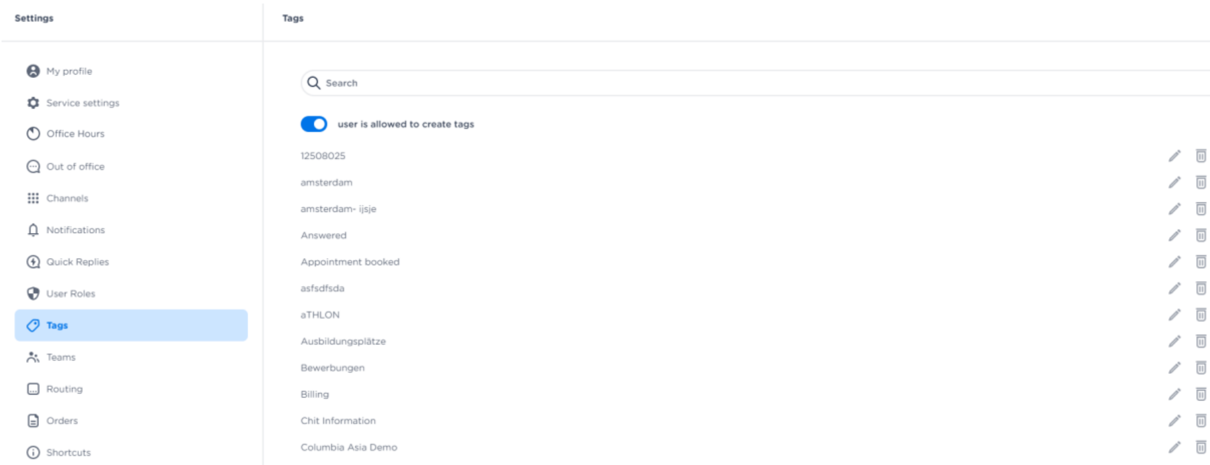
- **CM Employee**: CM employee users who have or had access to your account. Does not take up a seat.
- **Administrator**: Is allowed to adjust the configuration of the Customer Contact environment and answer any conversation. Takes up a seat.
- **Agent**: Is allowed to answer any conversation but is only allowed to view the settings or configurations of the Customer Contact environment (not the statistics). Takes up a seat.
- **Watcher**: Is only allowed to read conversations. Does not take up a seat.
- **Disabled**: Is not able to access the Customer Contact environment. Does not take up a seat. Users that your remove from you CMs company account get assigned this role.

	Administrator	**Agent**	**Watcher**
Scope	Entire Account	His/her own work, and work that is assigned to others in the team.	Entire account
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 him/herself and others	Yes, to him/herself 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 has been worked on	No access	Yes, can view and export what has been worked on

Tag management

Incoming chats can be tagged. This helps you archive them and later when you want to find something again. This also helps for reporting and analysis.

Tags are different per organization. You can create tags 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 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 the toggle button is blue, agents can add tags while archiving the conversation. When it is grey they cannot. This prevents a wide diversity of tags that are more or less the same.

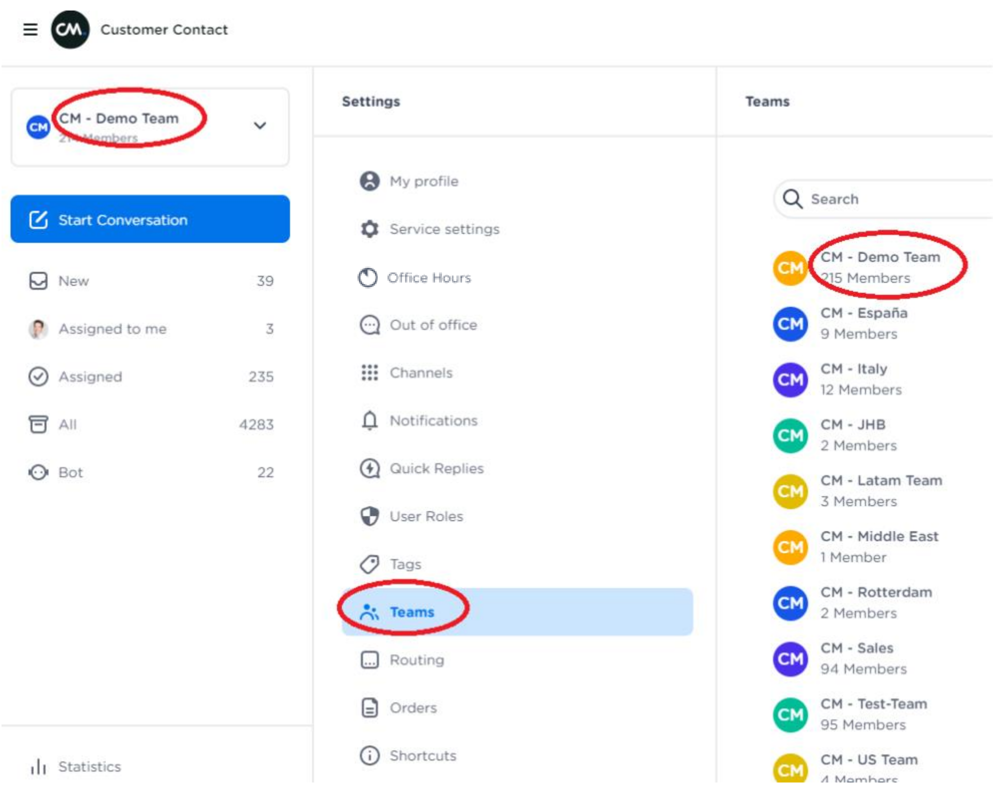
Teams

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.



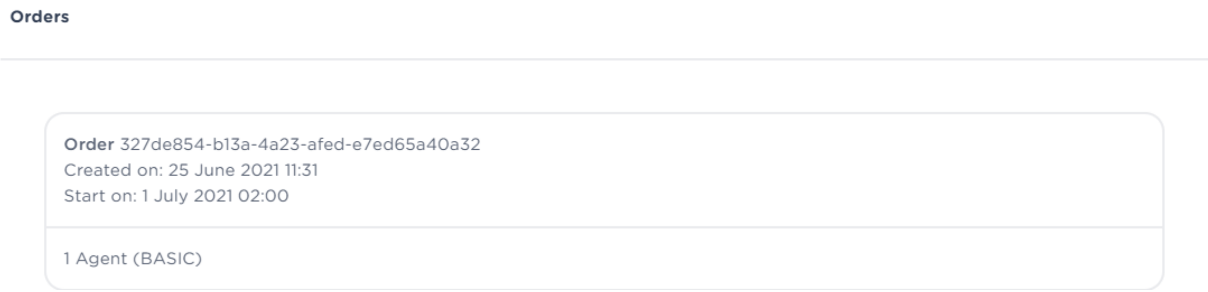
Route chats to a team

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.

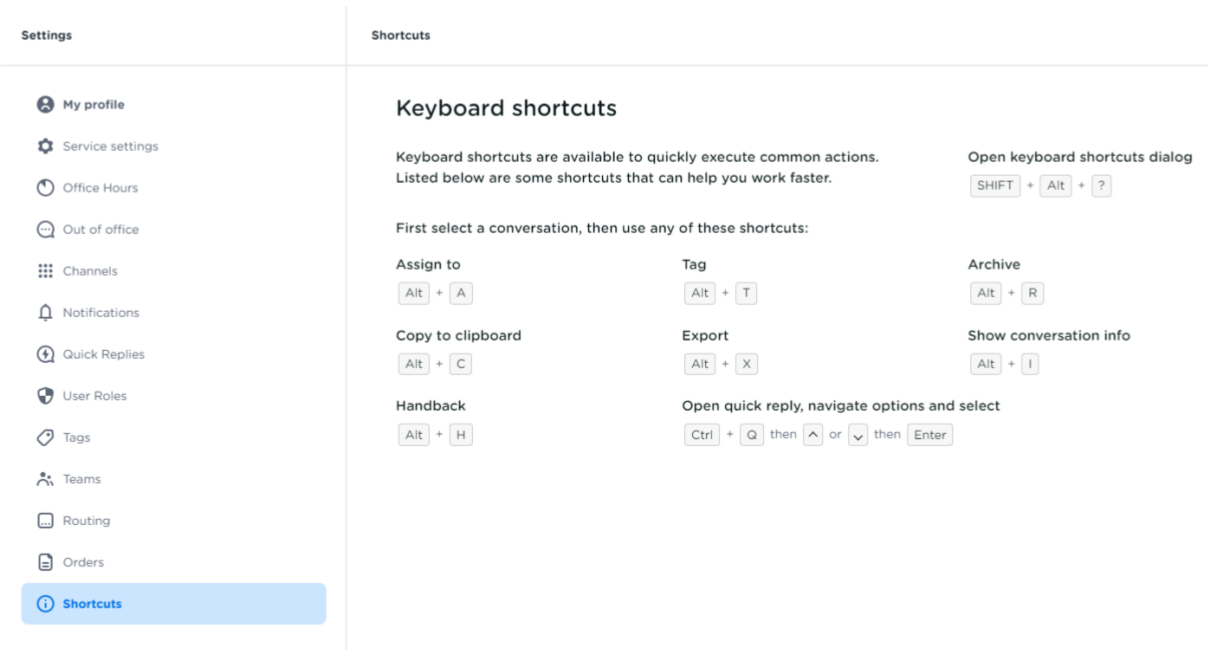
Orders

Here you can see some basic details about your order. You can see the created date, the start date and how many agents you are currently paying for.



Shortcuts

This page displays all the awesome shortcuts for Customer Contact. All of these shortcuts are designed to make your life much easier when working with Customer Contact.



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 team’s happiness, performance and your customer journey 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. Insight on most used tags
3. Usage of channels over time and %
4. Activity per agent
5. **Quick view of the current occupancy state**
6. Filter the time-period of this statistics page