Customer Handbook | Agent Assist

version 1.0

Revision History

Document Version #	Revision Date	Prepared By	Reviewed By	Summary of Changes
1.0	Mar 14, 2022	Shrikant Iyer	Rahul Gupta	First Version

1. Introduction

Customer support dashboard is a modern solution to monitor and respond to all incoming/two-way messages on your social media channels

- WhatsApp Business number
- Google Business Manager
- Instagram Channel
- Gupshup Messaging channel (GIP)
- & more

It helps businesses to deliver personalized and uninterrupted customer services in an easy and accessible way.

It provides quick access to chats based on criteria that will help the agents to prioritize their work.

The dashboard provides visibility to the vital conversation and productivity metrics to identify the gaps to remove shortcomings and improve performance and ultimately customer satisfaction

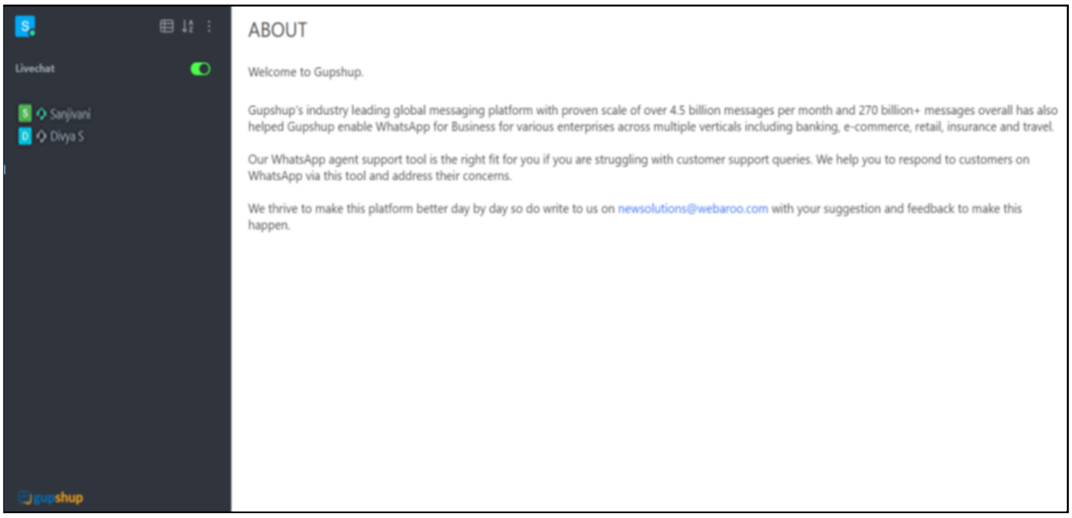
2. Prerequisites

Gupshup customer support dashboard link and panel credentials. :

Log in to the Gupshup customer support dashboard link shared with you:
https://companyname.gsmedia.com

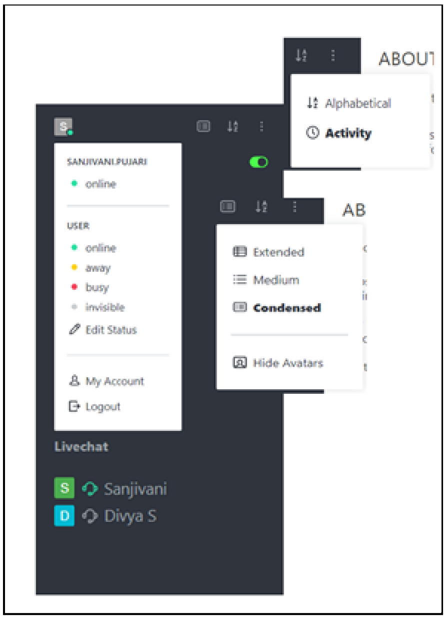
3. Customer Support Dashboard Home Page

Home Page



- On the home screen you will see a welcome message from Gupshup in the centre section.
- You can view your profile details in the left top corner.
- The messages assigned to you will show up in the left-hand pane

- To the left-hand navigation you will see a green toggle button, it is mandatory to switch this button on (this indicates that the agent is online)
- The chats can be viewed in three ways: Extended / Medium / Condensed
- You can view the chats Alphabetically or Latest chat
- Clicking on the three ellipses you can navigate to
    - Administration section
    - Livechat section
- A daily count of the chats handled by an agent is also visible to the agent's in the form of
    - Chats Assigned
    - Chats Closed



4. Types of Roles/Rights which can be assigned to any user

Agent Assist dashboard is used by three types of users

- Agent
- Manager
- Admin

	ADMIN	**MANAGER**	**AGENT**
RIGHTS	Users with Admin rights can create new admin/manager and agents and updated rights Admin can take control of chat from agent and manager Admin is responsible for managing the users of the software and adding HSM templates.	Manager can take control of chat from agent and manager Manager is responsible for monitoring the live chat, agents, managers, and departments	Users with agents rights can chat if online and live chat is enabled Agent is responsible for effective resolution of issues raised by a customer.
ANALYTICS	Users with admin rights will have access to analytics.	Users with manager rights will have access to analytics	N/A

5. Administration Section

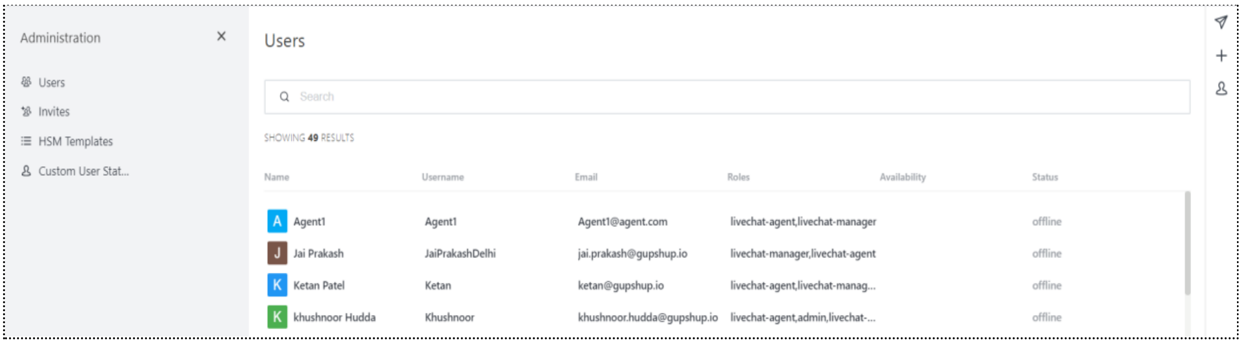
Only the admin can do the following activities on the Administration page

5.1. Options available to brand administrators

- Manage the agent support dashboard users
- Add new users
- View a list of users (both admin and manager can perform this action)
- Add and delete HSM template (both admin and manager can perform this action)
- Enable/Disable Waiting Area function
- Create/manage chat tags
- Modify Settings
    - Integrate with CRM (Visitor Details)
    - Enable reminder messages to idle users (Nudge Users)
    - Create/Edit Canned responses (Quick Responses)
    - Create/Edit Automated responses (Standard Responses)
    - Enable/Disable Nudge to agents and manager notifications (Nudge Agents)

5.2. Administration Section - Users

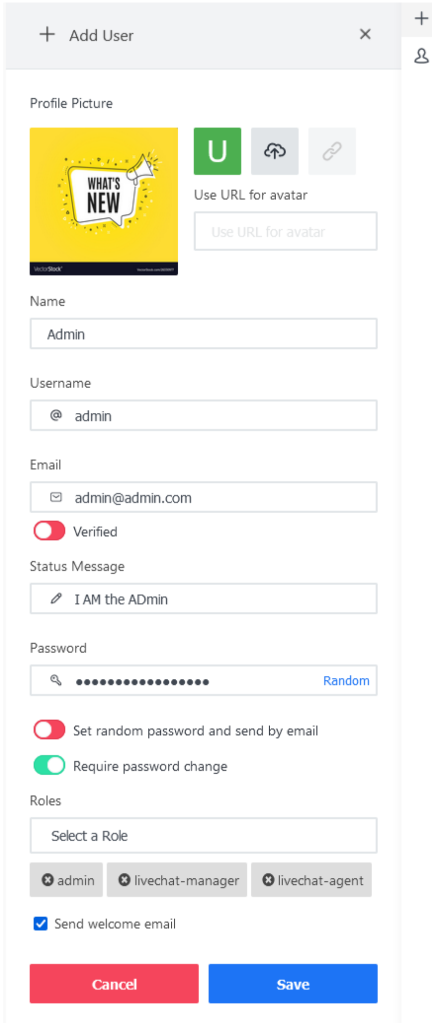
To search users who are added to the dashboard, the admin can click on the search bar and type the name, username, or email ID of the desired users.



gupshup

5.3. How to add new users:

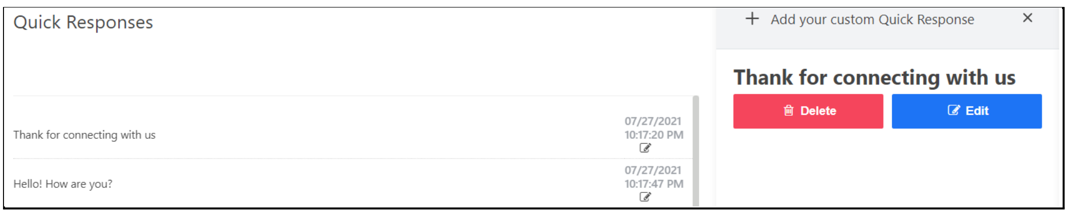
- Click on the (+) button on the left top corner of the user's page
- Add a Profile picture with the attach option available (optional)
- Enter the name of the user
- Enter the username of the user
- Enter the email address of the user
- Admin needs to make sure to turn the "require password change" button on
- Add a password to this user
- To assign a role to this user choosing the option from the drop-down menu in the roles tab
- NOTE: You can add three roles right now
    - Admin
    - Manager
    - Agent
- The same person can have multiples roles as well but the user with only Admin rights can perform the actions on the Administration Page
- Click on the save button to save your new member addition details



5.4. Administration Section - Quick Responses

If there are responses that will be used on a day to day basis, you can create those responses here so that the agents do not have to type out the responses for each and every incoming message. The character limit is 2048 characters.

- Admin can perform this action.
- Click on the (+) on the top right corner and type in the quick response and save.
- All the quick responses added will be listed down the quick response section
- To edit/delete any quick response click on the edit button next to the quick response and click on edit and delete respectively



To use the quick response, the agents will have to type (%) on their keyboard while replying to the chats and the list of quick responses will be displayed.

5.5. Administration Section - HSM Templates

You can add the approved/ whitelisted /enabled templates from the Analytics Panel to the customer support dashboard

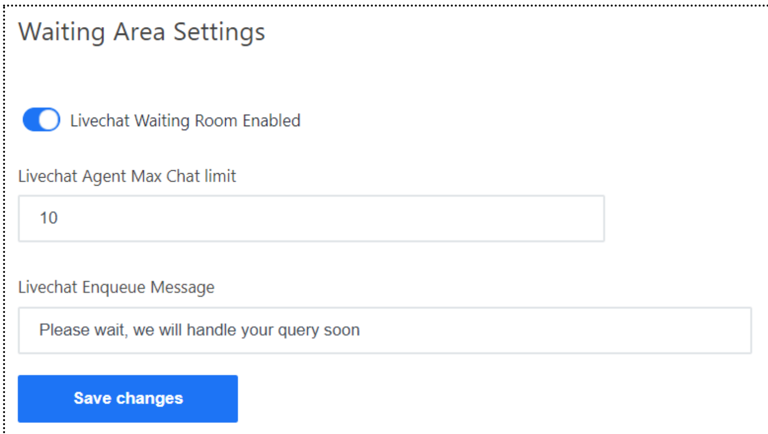
Please note these templates can be sent to only opted-in customers.

To add the HSM template click on the plus icon and then enter the required details in the template box and then click on the Save button.

Please make sure you copy-paste the exact template from the Analytics Panel with no extra space or words.

5.6. Administration Section - Waiting Area

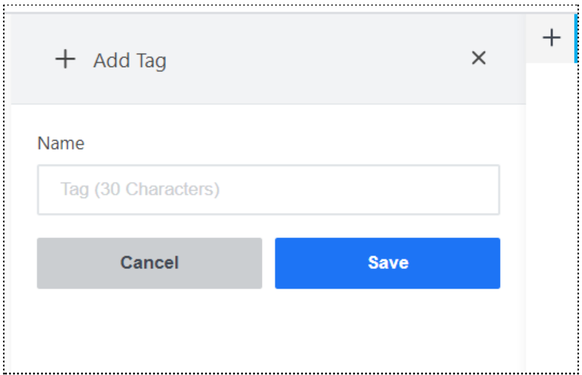
To determine a specific limit to the number of messages each agent should receive, click on the waiting area settings.



- Switch on the "Livechat Waiting Room Enabled" button ON
- Enter the number limit to the messages each agent can receive on the "Livechat Agent Max Chat limit" section
- Enter a message that your customers will receive while they are in the waiting list in the "Livechat Enqueue Message" section.

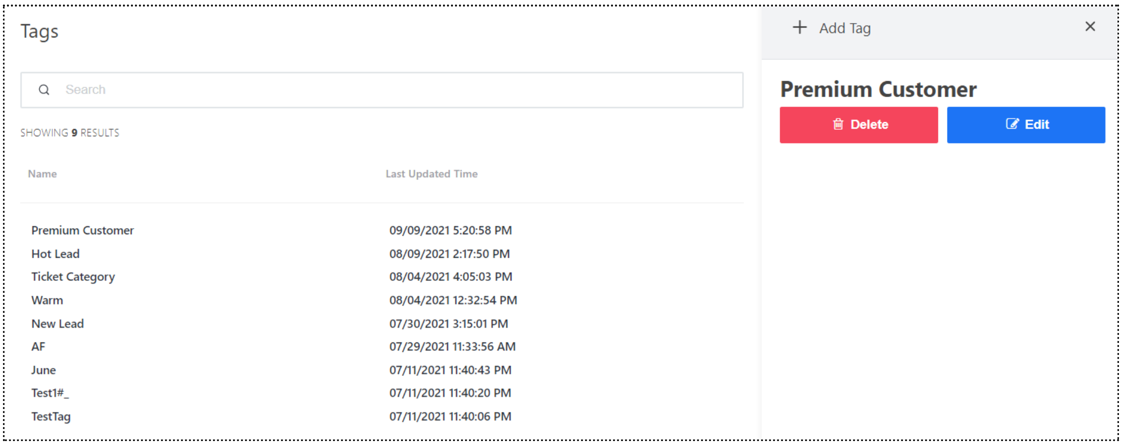
5.7. Administration Section - Tags

The Admin/Manager can create tags here. The agents can later use the used tag to highlight a particular conversation under that particular tag.



Click on the (+) Button on the open write corner of the tags section and type in the name of the tag in the "Name" section and Save.

The list of all the created tags will appear under the "Tags" section. You may further click on any of the tags to edit or delete them.



Click on the (+) Button on the open write corner of the tags section and type in the name of the tag in the "Name" section and Save.

The list of all the created tags will appear under the "Tags" section. You may further click on any of the tags to edit or delete them.

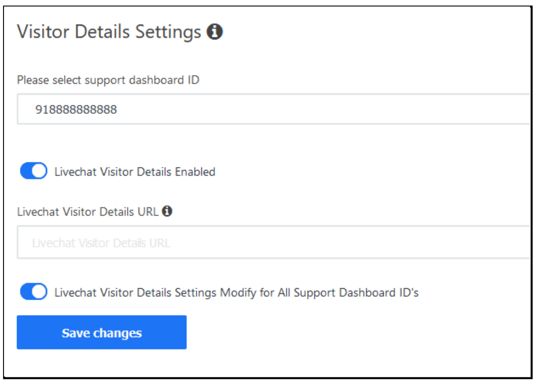
5.8. Administration Section - Customer information fetch

The section allows brand admin to configure the ability to fetch information about a customer from any CRM.

The brand admin can select the WABA against which the information is to be retrieved

Configure the callback URL of the CRM

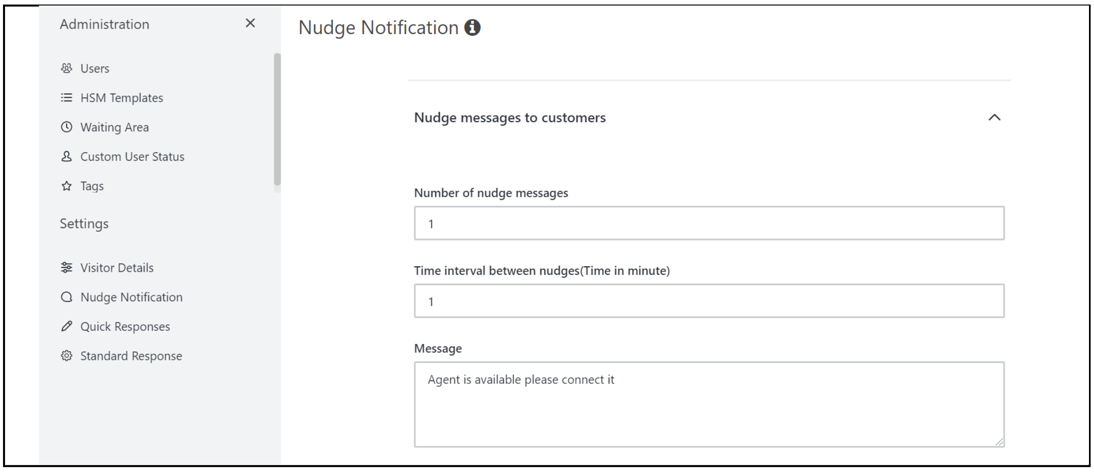
The user information can be configured globally or for individual WABA numbers



5.9. Administration Section - Customer information fetch

Nudge Feature enables the Support dashboard to send automatic nudge messages, in the event of an unresponsive end user. It allows the following configurations:

- Number of Nudge messages: Admin can decide how many nudge messages to send
- Time interval: Admin can decide wait time before the first nudge and then the time interval between subsequent nudges
- Nudge Message: Admin can decide what to send as a nudge message. At the moment, it’s a single message i.e. first, second and 3rd nudges are all the same message



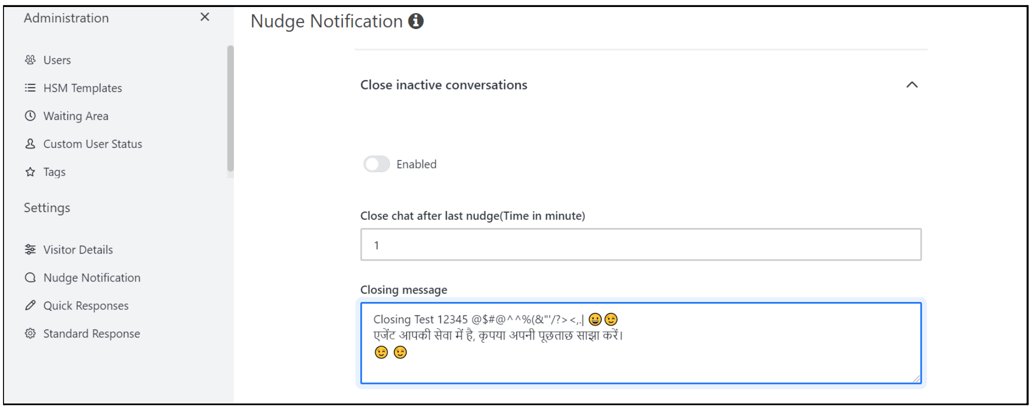
Close inactive conversations

This feature allows Admin to automatically close inactive conversations. If enabled, the chat will close automatically after the given interval time and the configured closing message will be sent to the user.

This feature can be used in conjunction with the “Nudge feature” i.e. an inactive conversation can be closed after N nudges.

Closing Message

In this section, closing messages can be specified.



Response Standardization Feature

Using Standard Response users can customize response messages automatically sent for various scenarios.

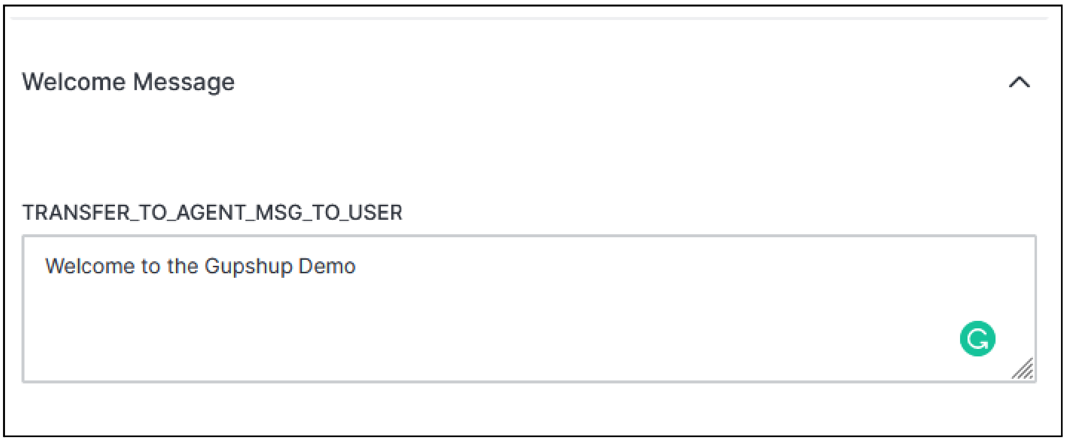
The brand admin can also use 3 variables in the standard responses to be included:

- %s can be used to include the brand name
- %u can be used to include the username. This is possible only when the user to agent mapping API is being used
- %a can be used to include the agent name. This is possible only when the user to agent mapping API is being used

Following scenarios can be configured:

Welcome message

When a new user messages the brand, a welcome message will be sent.



When all the agents are Offline/Busy

When all the agents are offline/Busy state. some of the options are the following:

a. Response sent when all agents are busy(Not available): When an agent is in the busy state then standard response sends the message. (Eg: Thank you for Connecting with %s. Busy hour message)
b. Response sent outside of office hours: When office hours is enabled then standard Response sends the message.(Thank you for Connecting with %s. Office hour)

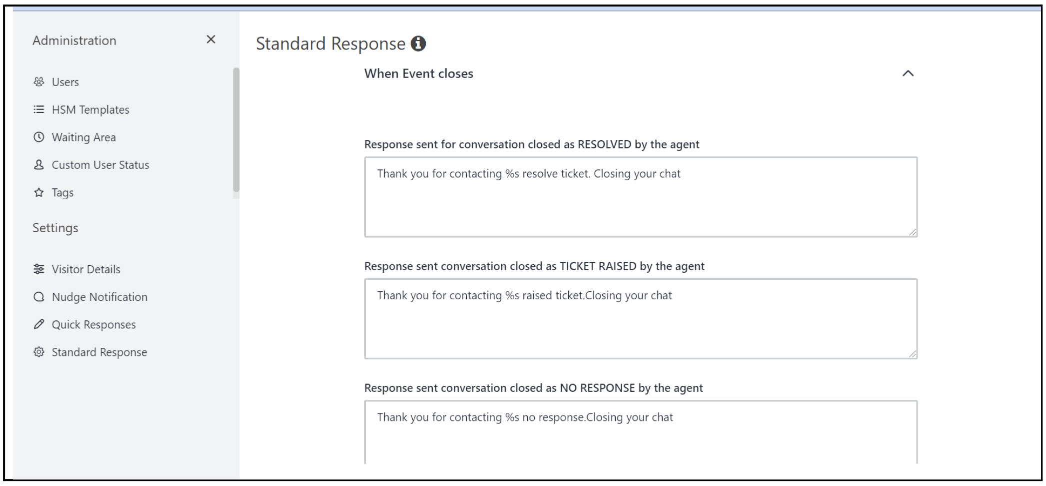
When Event Closes

When chat closes by an agent then some of the options are following:

1. Response sent for conversation closed as RESOLVED by the agent: When chat is closed by the agent using Resolved Reason then standard response

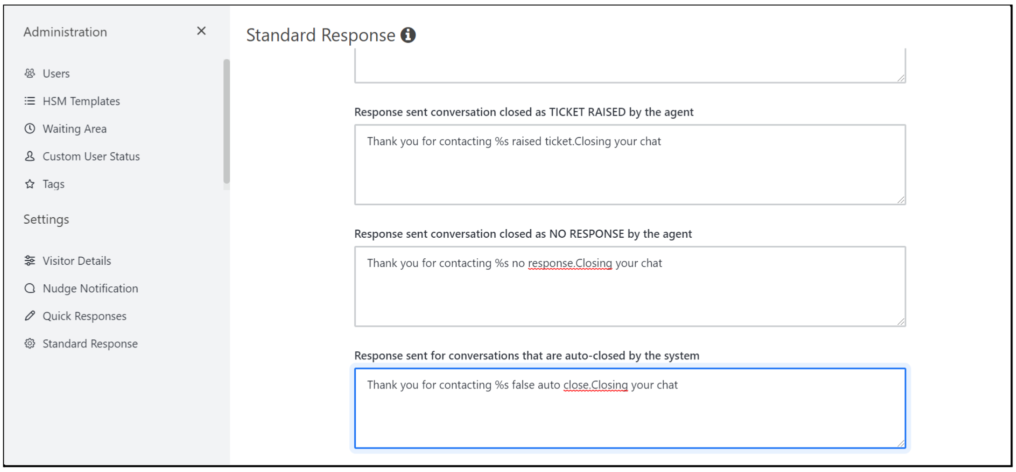
sends the Resolved message. (Thank you for contacting %s resolve ticket. Closing your chat)

2. Response sent conversation closed as TICKET RAISED by the agent: When chat is closed by the agent using Ticket Raised Reason then the standard response sends the message. (Thank you for contacting %s raised ticket. Closing your chat).



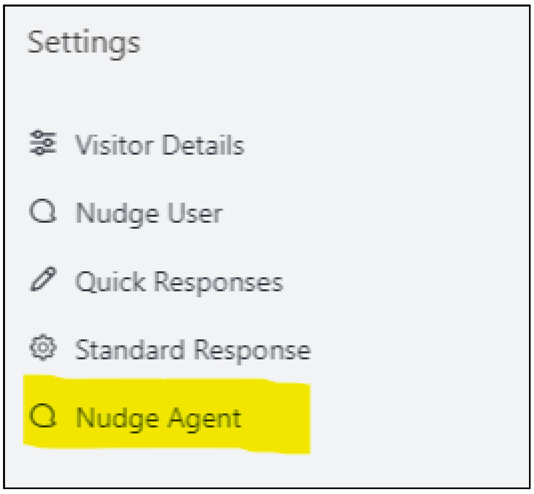
3. Response sent for conversation closed as NO RESPONSE by the agent: When chat is closed by the agent using No Responses Reason then the standard response sends the message. (Thank you for contacting %s no response. Closing your chat).

4. Response sent for conversations that are auto-closed by the system: After 24 hours if someone doesn't reply then the chat will close automatically. And for auto closed standard Response send the message (Thank you for contacting %s false auto close. Closing your chat).



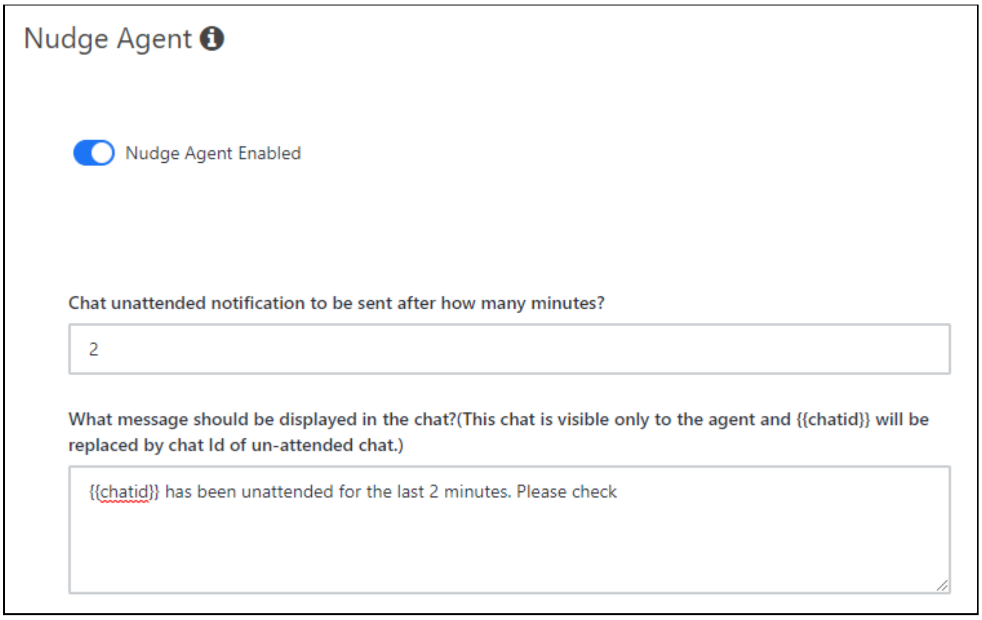
5.10. Livechat Section - Current Chats

A nudge agent section has been added in the admin panel. This section will include an option to notify the manager and agent if a chat has gone unresponded beyond a configurable time limit in minutes.



Nudge Agent section added in the admin panel under the settings menu

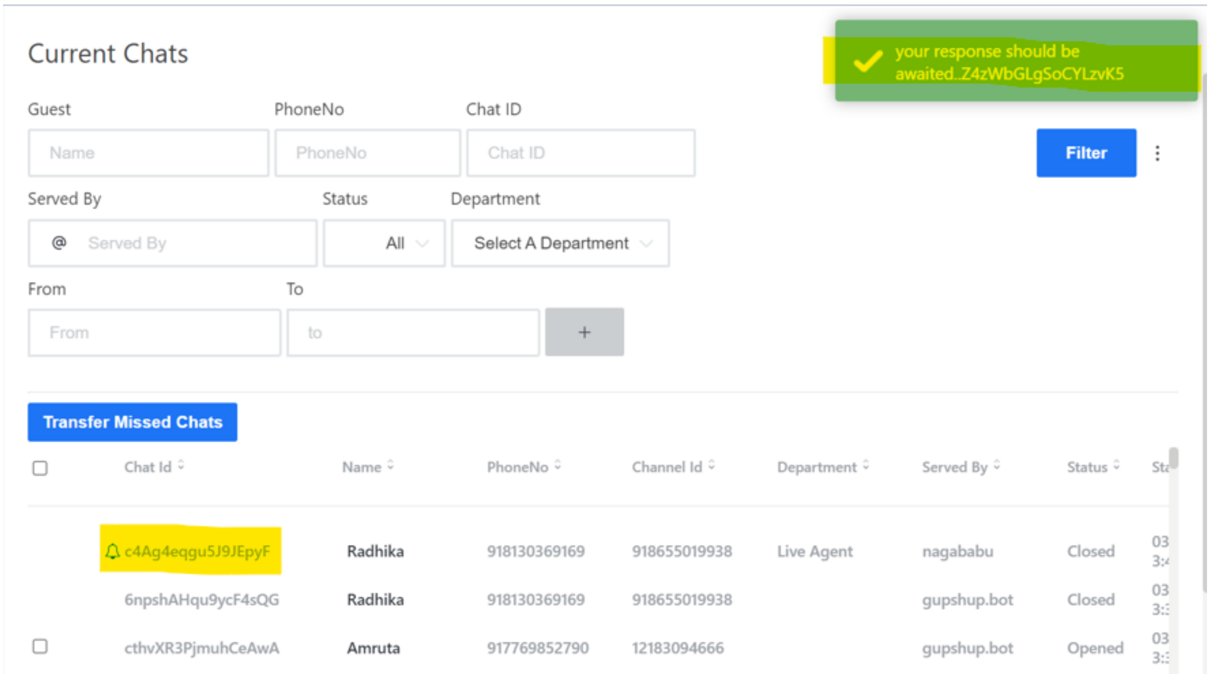
- The nudge agent consists of a toggle button to switch on/off the feature
- A text field to enter the time in minutes
- A text field to enter the message which needs to be shown to the agent



The brand admin can include the chat id in the notification as a variable by using {{chatid}} in the message.

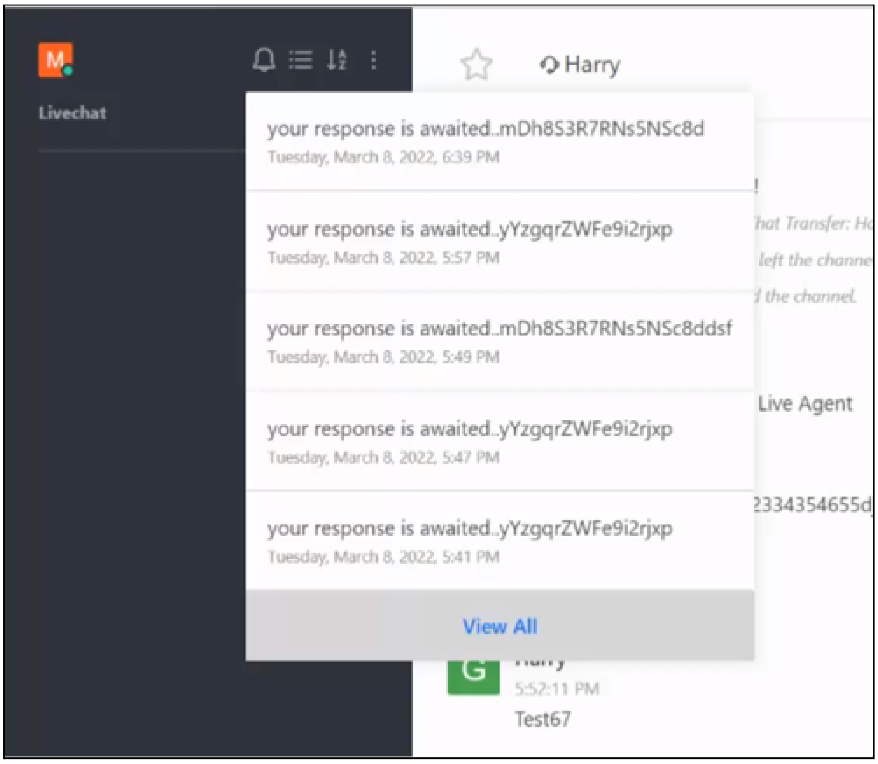
Manager panel

In the current chat section, an exclamation mark appear next to chats that have received the unattended chat notification (refer to highlighted areas in the image)

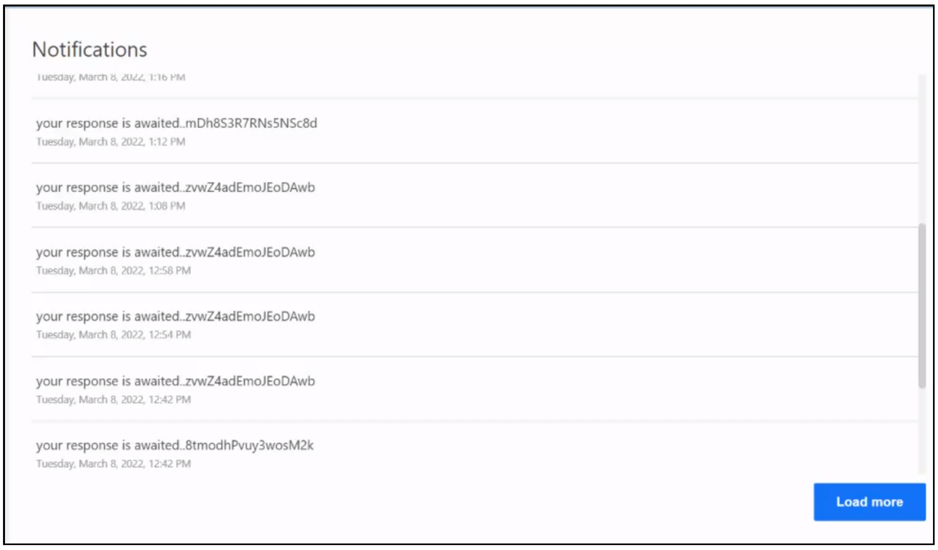


Agent panel

In the agent section, an audible notification is sent out and a visible notification appears in the notification (Ref attachment: Agent Notification)



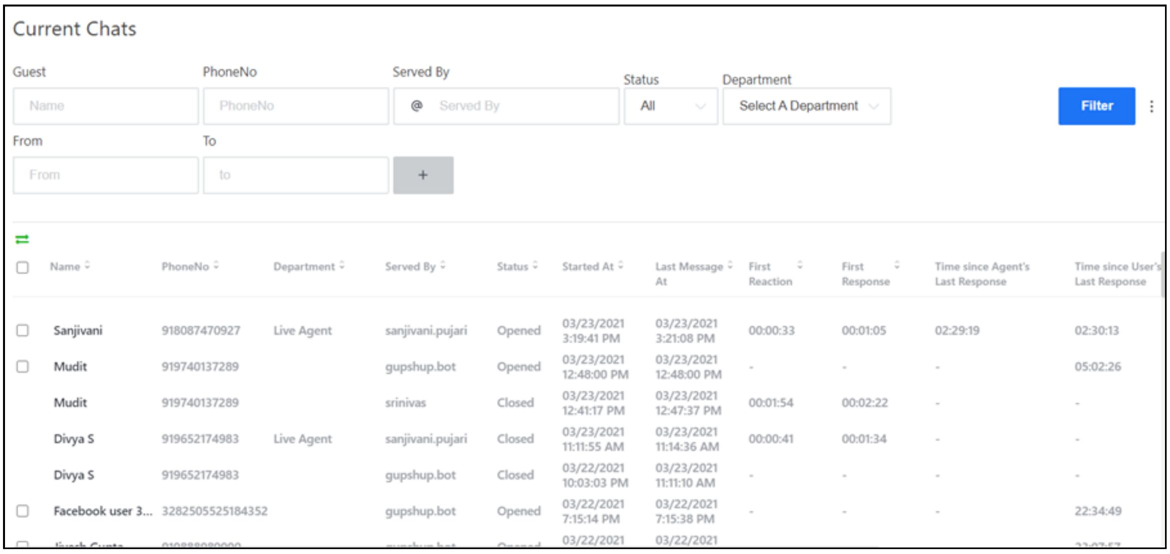
On selecting the view all notifications, a page with all unread notifications is displayed



6. Livechat Section -

6.1. Current Chats

Here the Admin/manager only can view the list of all the current chats that have happened.



Name	PhoneNo	Department	Served By	Status	Started At	Last Message At	First Reaction	First Response	Time since Agent's Last Response	Time since User's Last Response
Sanjivani	918087470927	Live Agent	sanjivani.pujari	Opened	03/23/2021 3:19:41 PM	03/23/2021 3:21:08 PM	00:00:33	00:01:05	02:29:19	02:30:13
Mudit	919740137289		gupshup.bot	Opened	03/23/2021 12:48:00 PM	03/23/2021 12:48:00 PM	-	-	-	05:02:26
Mudit	919740137289		srinivas	Closed	03/23/2021 12:41:17 PM	03/23/2021 12:47:37 PM	00:01:54	00:02:22	-	-
Divya S	919652174983	Live Agent	sanjivani.pujari	Closed	03/23/2021 11:11:55 AM	03/23/2021 11:14:36 AM	00:00:41	00:01:34	-	-
Divya S	919652174983		gupshup.bot	Closed	03/22/2021 10:03:03 PM	03/23/2021 11:11:10 AM	-	-	-	-
Facebook user 3...	3282505525184352		gupshup.bot	Opened	03/22/2021 7:15:14 PM	03/22/2021 7:15:38 PM	-	-	-	22:34:49

To search the chats the Admin/manager can use guest, phone, served by, status, department, from, to, and tag filters.

To Transfer all chats which could not be assigned due to agent unavailability or due to non-working hours, the Admin/ manager can click on the reversible reaction icon then click on transfer in the following pop-up

NOTE: All the incoming chats which are received - when all the agents are offline and after office hours will automatically get assigned to Gupshup bot

Once you click on the transfer button the chats will automatically get transferred to the agents who are online at that moment.

You may click on the (+) Button next to the filters and search by tags as well.

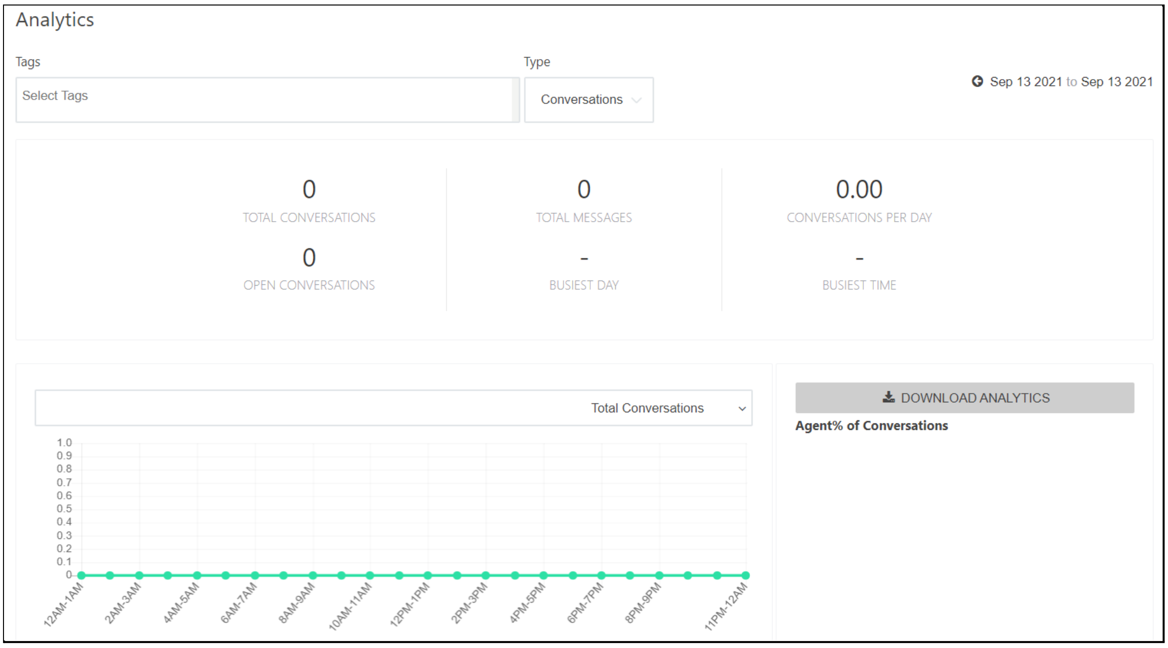
6.2. Livechat Section - Analytics

NOTE: This section will only be visible to an Admin / Manager

On the analytics page, the admin/manager can monitor the conversations, productivity metrics and productivity of individual agents which can then be downloaded.

There is an option to filter and view all the conversation and productivity metrics using the time period in the top left-hand corner

below list are all the data points captured during the course of the user journey on the support dashboard:



Total conversations:
They are the total number of conversations in the selected time period.

Total Messages:
They are the total number of messages in all the conversations in the selected time period.

Conversations:
Per day is the total number of conversations divided by the number of days in the selected time period.

Open Conversations:
Are the number of conversations still open in the selected time period.

Busiest day:
Is the day that has the maximum number of conversations in the selected time period.

Busiest time:
Is the time interval that has the maximum number of conversations in the selected time period.

The average of response time
Is the sum of the response time of the live agents divided by the number of responses in the selected time period.

Average of first response time
Is the sum of the first response time of the live agents divided by the number of first responses in the selected time period.

Average of reaction time
Is the sum of time realized from bot to agent handover to the agent's first response divided by the number of such responses in the selected time period.

Average resolution time
Is the sum of time realized from bot to agent handover to the chat closure time divided by the total number of chats handed over to agents in the selected period.

Average closure time
Is the sum of time realized from when the user pings to the chat closure time divided by the total number of chats in the selected period

You may also view the Tag wise Analytics by choosing the tag in the "Select Tag Section"

6.3. Livechat Section - Real-Time Monitoring

1. On the Real-time monitoring page, you can observe conversation, chats, productivity, and service metrics in real-time through pie charts and graphs.
2. **NOTE: Real-time monitoring section will show you data for that particular day**
3. The Admin/ Manager can monitor all the metrics on the following real-time values:
   5 seconds
   10 seconds
   30 seconds
   1 minute

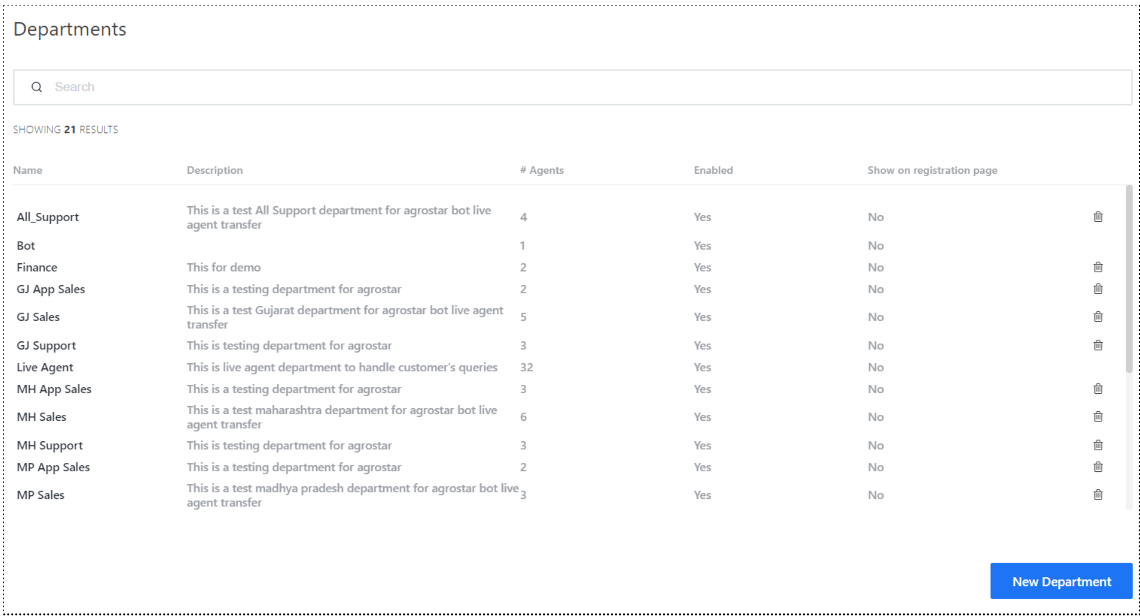
6.4. Livechat Section - Managers

1. Here you can view the list of all the live chat managers.
2. Add, search, and delete managers from the list using this page.
3. To add a live chat manager, the manager user should search by username and then click on add button. The manager can add multiple users at one go.
4. To delete a live chat manager from the list, the manager user can click on the delete icon at the end of the corresponding live chat manager name.
5. To search a live chat manager from the list, users can click on the search bar and type the required manager's name.

6.5. Livechat Section - Agents

6. The Admin/Manager can view a list of live chat agents.
7. Admin can add, search, and delete agents from the list using this page. :
8. To add a live chat agent, the manager should search by username and then click on the add button. Admin / Managers can add multiple users at one go.
9. To search a live chat agent from the list, the manager can click on the search bar and type the agent's name.
10. To delete a live chat agent from the list, the manager can click on the delete icon at the end of the corresponding live chat agent's name.

6.6. Livechat Section - Departments


Departments

Search

SHOWING **21** RESULTS

Name	Description	# Agents	Enabled	Show on registration page
All_Support	This is a test All Support department for agrostar bot live agent transfer	4	Yes	No
Bot		1	Yes	No
Finance	This for demo	2	Yes	No
GJ App Sales	This is a testing department for agrostar	2	Yes	No
GJ Sales	This is a test Gujarat department for agrostar bot live agent transfer	5	Yes	No
GJ Support	This is testing department for agrostar	3	Yes	No
Live Agent	This is live agent department to handle customer's queries	32	Yes	No
MH App Sales	This is a testing department for agrostar	3	Yes	No
MH Sales	This is a test maharashtra department for agrostar bot live agent transfer	6	Yes	No
MH Support	This is testing department for agrostar	3	Yes	No
MP App Sales	This is a testing department for agrostar	2	Yes	No
MP Sales	This is a test madhya pradesh department for agrostar bot live agent transfer	3	Yes	No

New Department

On this page, the Admin/Manager should add agents to the live agent department.
NOTE: A chat cannot be transferred to an agent unless he/she is added to the live agent department irrespective of he/she is online

1. The manager can see a list of departments on this page, search and delete departments from the list and can also add a new department.
   NOTE: The incoming chats will first land/ get assigned to the user who are added in the Live Agent department, they can then manually forward the chat to another department.
2. To add a new department Admin / Manager can click on the new department button.
3. A new department page will open. The manager can enter the name of the new department in the name box and then can add the description of the department.
4. To enable the department and to show it on the registration page, Admin/ manager can click on the radio button 'Yes'.

5. To add the department email ID, the manager should add an entry on the email box.
6. To add agents to the department, the manager can search an agent in the search bar by username and then click on the add button.

6.7. Livechat Section - Office Hours

1. On this page Admin / Manager can manage the office hours and can do the following activities:
   Enable office hours
   Allow online agents outside of office hours
   Mark open days of the week
   Set office hours of the entire week
2. To enable the set office hours, the manager can click on true or else false.
3. To allow agents to be online outside office hours, the manager should click on true or else false.
4. To mark open days of the week, the manager can click on the respective days of the week.
5. To set office hours for each day of the week, the manager can select the opening and closing time of the day and then click on the save button

6.8. Livechat Section - Waiting Area Agent Limit

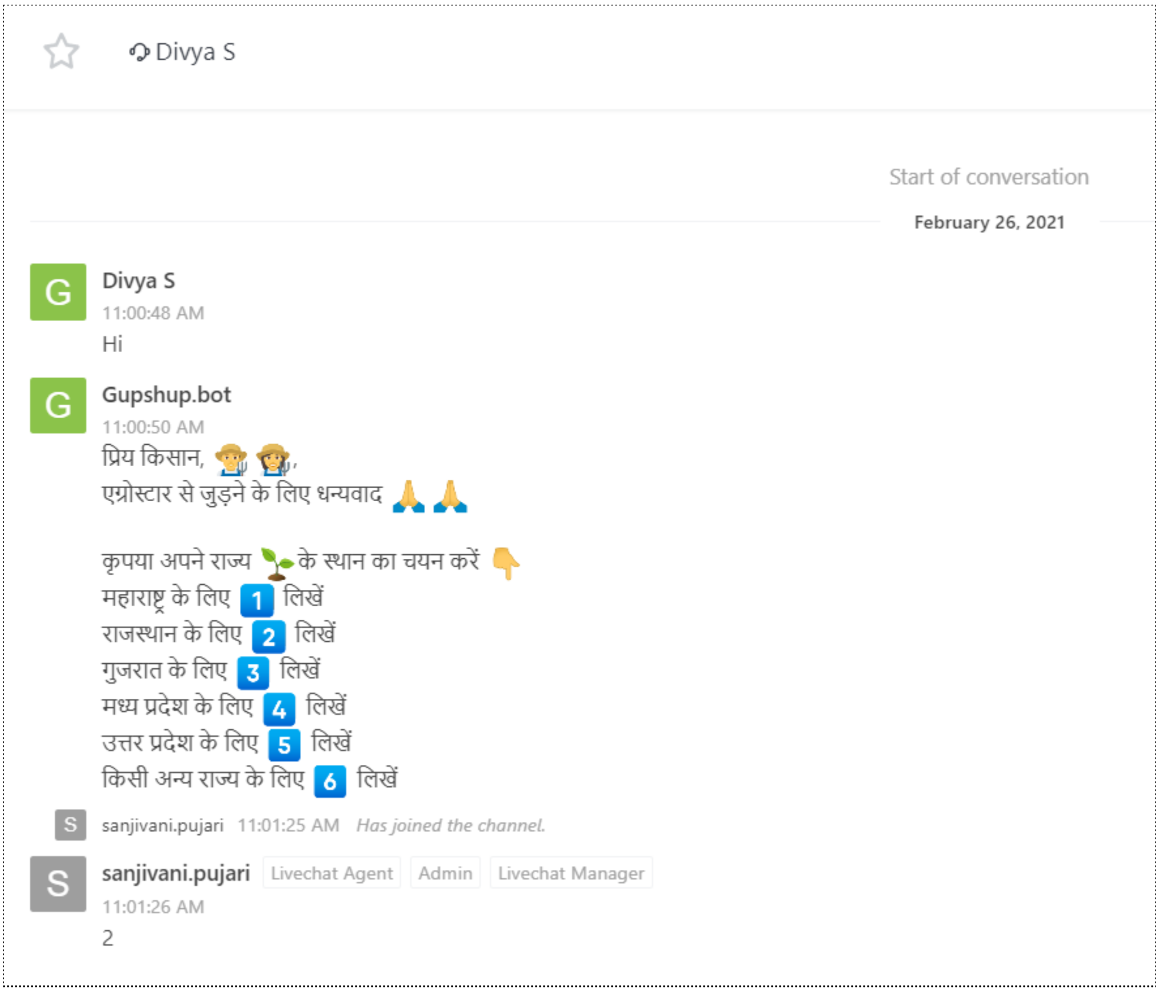
You can add a limit to the number of messages each agent can receive. The limit for each agent can be different as per their credibility.

1. Go to the waiting area agent limit under live chat section
2. Click on the edit button next to the agent's name
3. Add the number limit for that particular agent.

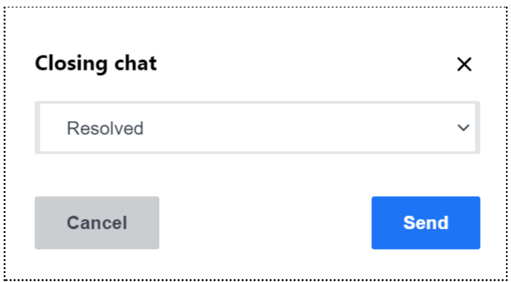
Name	Username	Max Chat Assignable
A AMIT	amit	8
A Abbott.agent	Abbott.agent	10
A Agent.interntheory	agent.interntheory	7
A Agent1	Agent1	2
A Agro_GJ_Sales	ag_gj_sales	10
A Agro_GJ_Support	ag_gj_support	10

7. What will an incoming conversation look like

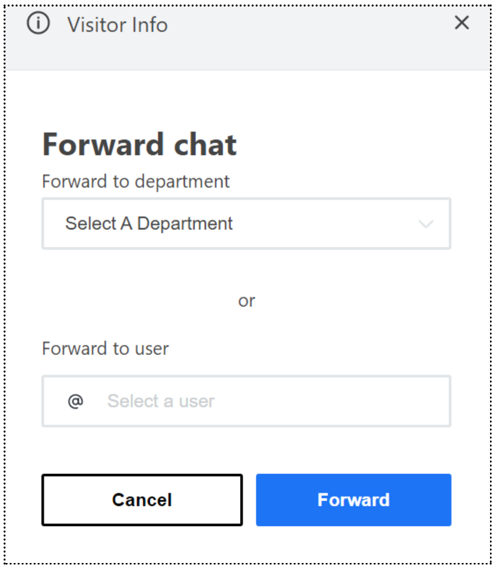
To send a reply to a chat, the agent should click on the chat and the respective chat room will open, where he/she can respond to the chat.



1. Close Chat: To close the chat agent should click on the close button and then choose a reason for closer and click on send.

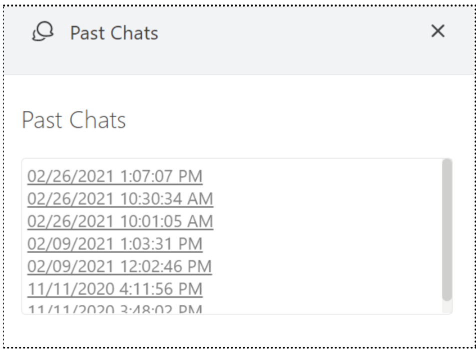


2. Forward Chats: To forward the chat agent should click on the forward button and then select a department and the user they want to forward the message in the forward chat pop-up.



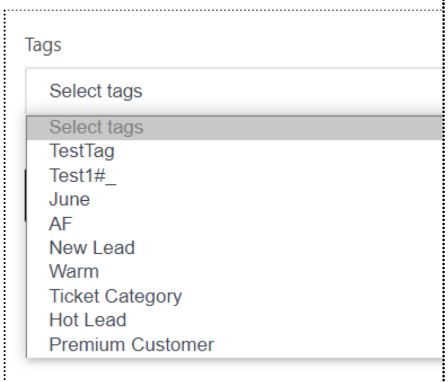
3.

4. Past Chats: To view past chats with the same user, the agent should click on the chat icon, the following pop-up will open, and then select the past chats from the list. Click on the (i) icon on the top left
NOTE: History for the past 90 days will be stored here



5.

6. Add Tags: Click on the edit button
Click on the Tags button and all the tags added will show up in the drop-down
Choose a tag from the list and save



7.

8. Gupshup's Support Dashboard Best Practices and Guidelines

1. Make sure to switch the live chat toggle button on once you log in to dashboard
2. Make sure after adding a new agent you also add the agent to the live agent department
3. The chats served by the Gupshup bot can be transferred only by an Admin
4. The chat can only be transferred or replied to within 24hours.
5. Irr -respective of having multiple departments, the chats will first get assigned to the agents who are added in the Live Agent Department
6. HSM templates will only be available/shared to opted in customers.