TELLQ Multi

TELLQ MULTI PROGRAM INSTRUCTION

CONTENT

TECHNICAL SPECIFICATIONS AND DOWNLOAD OF THE PROGRAM [BALTNETA]

Minimum requirements for hardware:

- ✓ Workstation computer with at least 8Gb RAM (16Gb RAM recommended).
- ✓ Professional 3.5mm connector headphones, or professional USB headphones.
- ✓ Wired Internet access (The Internet comes to the computer by wire, not WiFi).
- ✓ Microsoft Windows 10 / 11 operating system only 64bit. (Non-older) or Mac OS latest version.
- ✓ Operating systems must have the most up-to-date UPDATE.

Requirements for network settings:

✧ **Engage the following IP addresses in the firewall so that there are no restrictions:**

185.140.231.165
185.140.231.166
185.140.231.167
185.140.231.168
185.140.231.169
185.140.231.170
185.140.231.171
185.140.231.172
185.140.231.173
185.140.231.174
185.140.231.175
185.140.231.176
185.140.231.177
185.140.231.179
185.140.231.181
185.140.231.182

Or the IP address mode (without any restrictions): 185.140.231.0/24

✧ **The specified STUN services must be available without restrictions:**

stun1.tellq.io:3478 (185.140.231.181) (UDP/TCP)

stun2.tellq.io:3478 (185.140.231.182) (UDP/TCP)

✧ **Data packet delay (Ping) - up to 10ms;**

IMPORTANT: The Tellq system has no restrictions on operating through a VPN, but in a VPN network configuration, it is necessary to implement the same exceptions to the rules that apply to your organization's internal network (workstations from which you used the Tellq system). Your company's IT administrator can help you verify that you create a VPN configuration.

If the Tellq system works correctly when using the company, and there are various malfunctions when working from home, check with the company's IT administrator whether the above requirements are implemented in your home network.

DOWNLOADING THE APPLICATION:

For the correct operation of the Tellq Multi platform, it is necessary to install the latest Tellq application in the workplace, which you can download at the addresses below:

Microsoft Windows 10 / 11 (Baltneta client) 64bit. https://tellq.io/application/latest/TellqBK.exe
MAC (Baltneta client) https://tellq.io/application/latest/TellqBK.dmg

TECHNICAL SPECIFICATIONS AND DOWNLOAD OF THE PROGRAM [BITĖ]

Minimum requirements for hardware:

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Requirements for network settings:

✧ **Engage the following IP addresses in the firewall so that there are no restrictions:**

86.38.35.4

86.38.35.5

86.38.35.3

86.38.35.6

86.38.35.7

86.38.35.8

86.38.35.2

✧ **The specified STUN services must be available without restrictions:**

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DOWNLOADING THE APPLICATION:

For the correct operation of the Tellq Multi platform, it is necessary to install the latest Tellq application in the workplace, which you can download at the addresses below:

Microsoft Windows 10 / 11 (Bee Client) 64bit. https://tellq.io/application/latest/TellqBite.exe
MAC (Bee Client) https://tellq.io/application/latest/TellqBite.dmg

INSTRUCTIONS FOR INSTALLING A NEW APP IN WINDOWS

Click on the download link that suits you (you should choose according to your operating system and operator. If you download the wrong version - you will not be able to connect to the Tellq system with your logins):

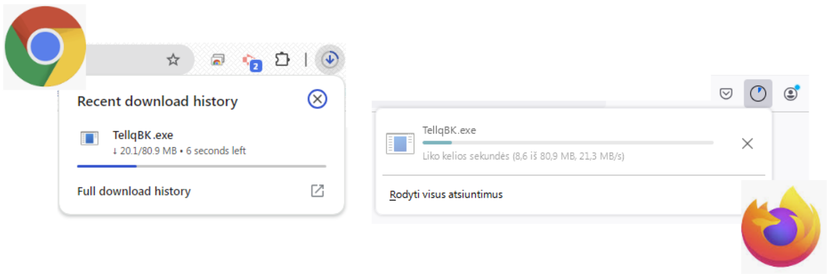
Microsoft Windows 10 / 11 (Baltneta client) 64bit. https://tellq.io/application/latest/TellqBK.exe

---

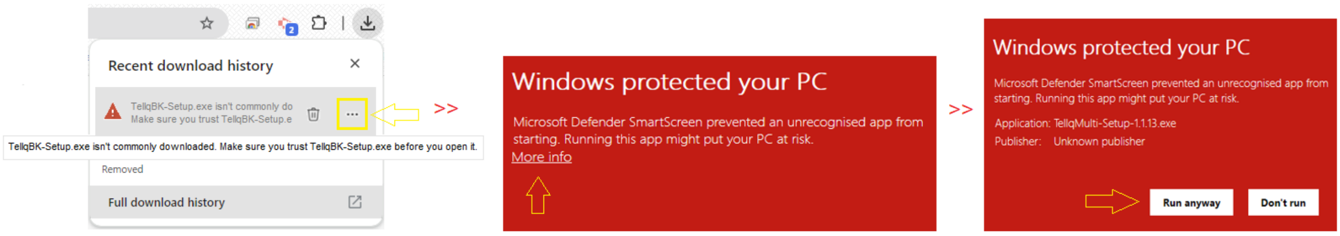
Microsoft Windows 10 / 11 (Bee Client) 64bit. https://tellq.io/application/latest/TellqBite.exe

---

After starting to send the program, you should see the following image (examples of Google chrome and Mozilla Firefox):



If it so happens that the apps don't allow you to download and you see the same messages, follow the steps:

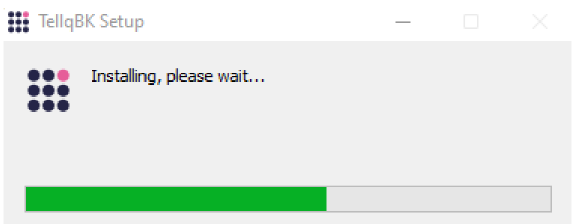


1. Press [...] and in the box that opens, select **keep** >> then the app will be downloaded to the end.

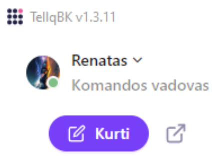
2. When you open the downloaded app – click on More info in the security table that pops up.

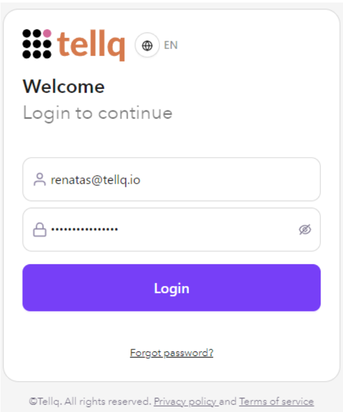
3. In the following security table press – **Run anyway**.

4. If you did everything well - the recording of the program will begin. The following table will indicate about this:



The latest version should be 1.3.11 about this is indicated by the badge visible in the upper left corner (above the name):





5. When you save the program - a login window will open. Enter your login details.

6. If you do not remember your password – press **Forgot password** and enter your **Login** information.

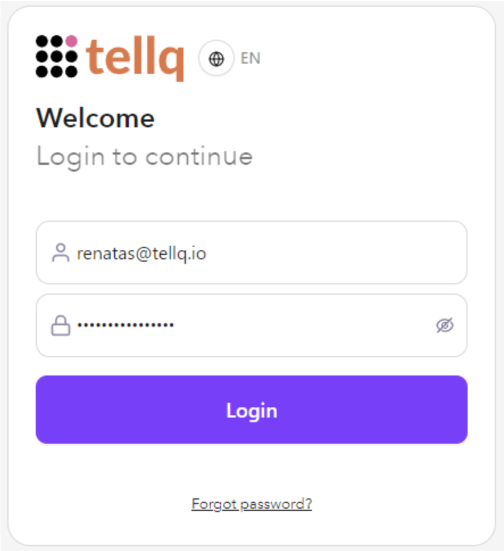
7. Click send **email** and the password recovery link you will receive in your email which matches your login information.

8. After resetting the password – log in to the app with your new login details.

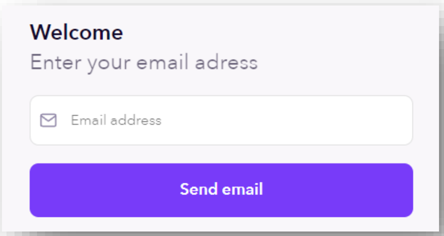
IMPORTANT: If you are a new user – you should have received the password creation link via email.

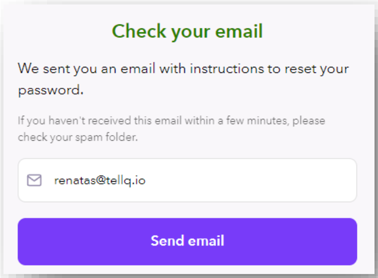
CHANGING THE PASSWORD ON THE TELLQ PLATFORM

In order to change your forgotten password – click on "Forgot password" at the bottom of the login window:

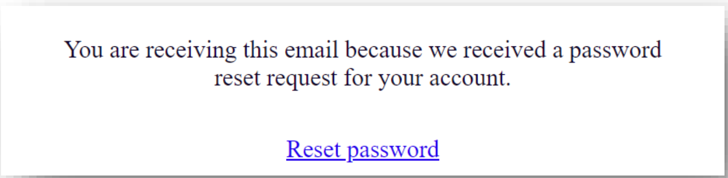


In the window that appears, enter your e-mail address (the address for which your account was created). Once the address is entered (the address must be valid and active) – click on send email to send the password reminder link to your e-mail.:You will see about the password recovery link sent successfully on the screen, in the next table:

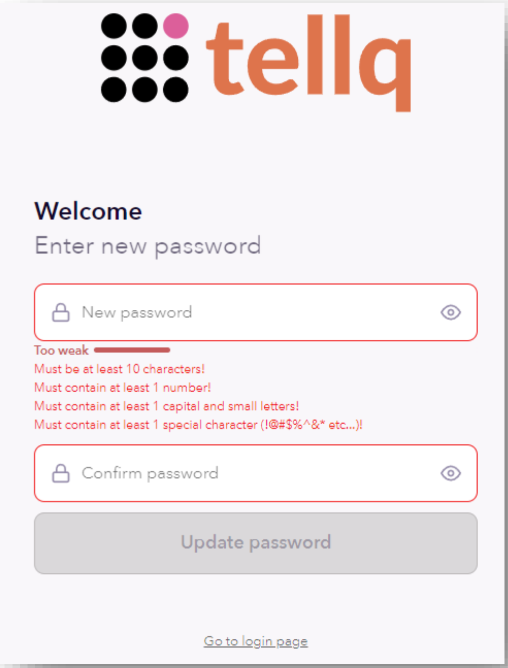




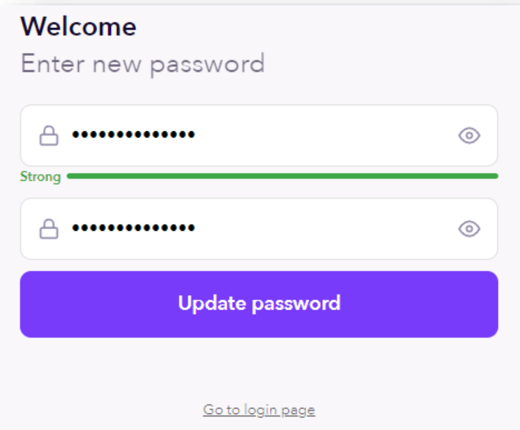
When you open the e-mail, you should see a letter with the following text. Press Reset password to start the password recovery process:



A new browser page will open, where you will see the table "Enter new password":



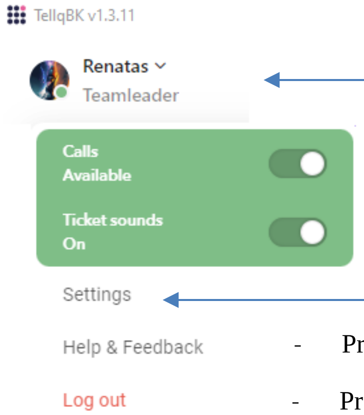
1. Your password should contain at least 8 characters.
2. The password should contain at least 1 number.
3. There should be at least 1 uppercase letter and 1 lowercase.
4. There should be at least one of the specified characters.



5. If you entered the new password correctly twice, you'll see a green arrow that says "Strong", which means that the signature is created and it's valid.
6. If you enter it correctly, the button with the inscription "Update password" should be activated - press it.
7. Turn off the browser window and log in to the app with a new password.

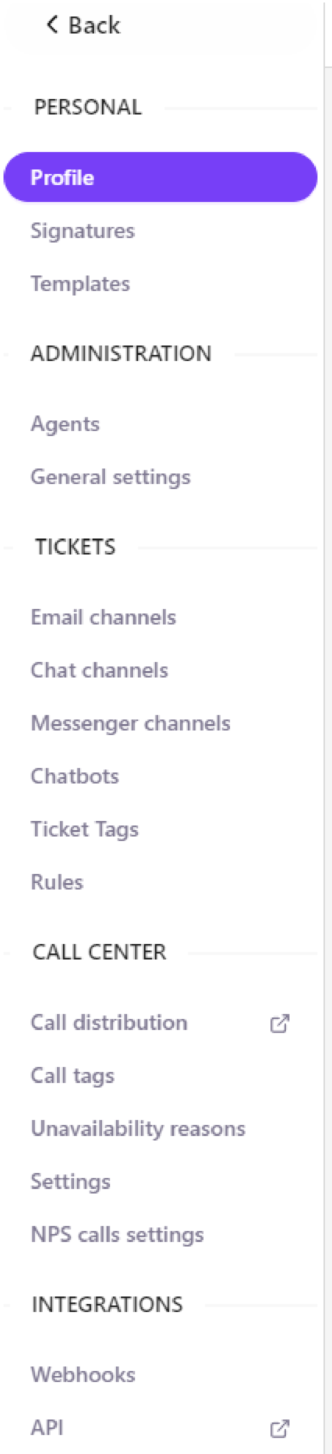
If you did all the steps correctly , you should log in to the app. Do not forget that the changed password is now your permanent password, which will need to be used when trying to log in to the app.

TELLQ TEAMLEADER SETTINGS



To get to TEAMLEADER SETTINGS, click on your name and select Settings.

- Press this button to start working with calls (Status "Available").
- Press this button to receive mail notifications (Status "Available").
- Press this button to enter the TELLQ help page.
- Press this button to log out of the system.



Return to the main window of the program.

User profile settings. Password / personal information / photo.

Mailbox signature settings. Personal /Agents.

Creating letter templates. Personal / general – for agents.

Creating a user and editing it.

Enabling additional functions.

Add mailboxes and set up users.

Live Chat user settings.

Messenger user settings.

Chatbot settings.

Setting up message tags.

Automation of letters.

Number settings / adding agents / forward / number entries, etc.

Call end Tag' setting.

Setting breaks.

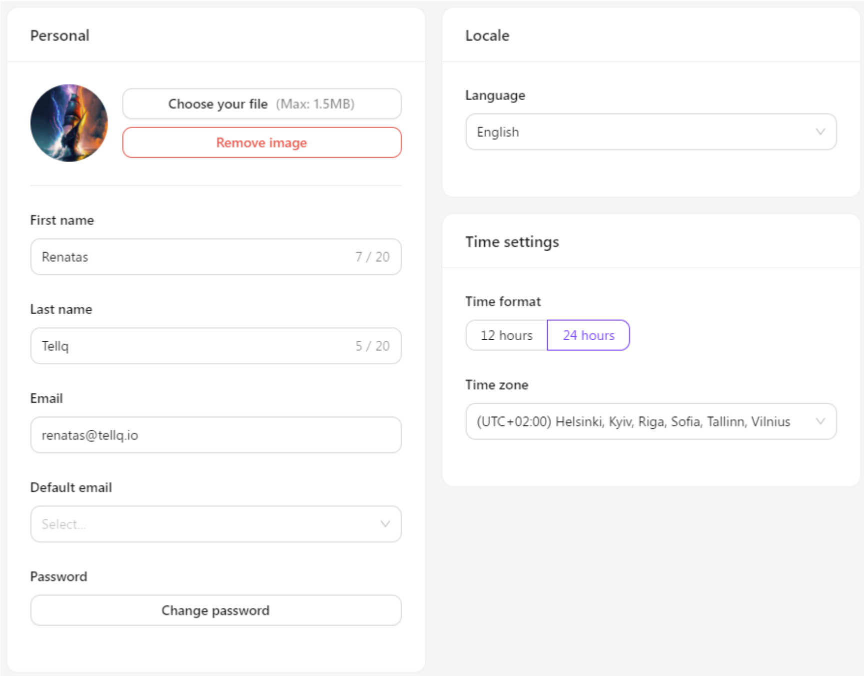
Additional call settings.

NPS evaluation settings.

Webhooks are used.

API description.

PROFILE SETTINGS



Avatar – you can upload your photo or the picture you want. Also remove it with remove image.

Time zone – You can set a time zone based on which we will count the system hours.

Time format – Select the system time format settings.

First name – Your name.

Last name – Your last name.

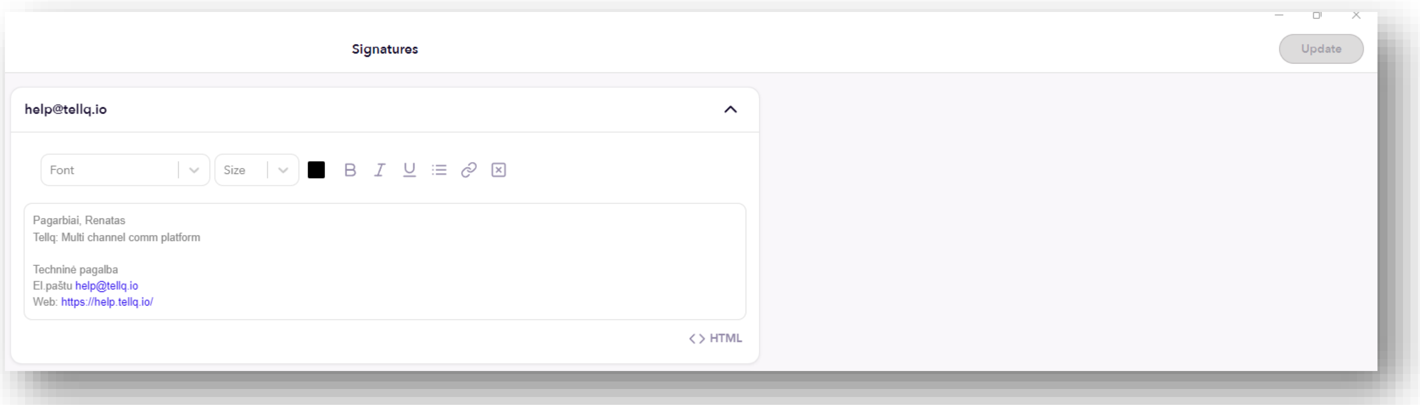
Email – your e-mail.

Default email – Set the main inbox from which you will write letters.

Password – Clicking change **password** will allow you to change your current password.

Language – You can choose the language of the system.

SIGNATURES (SIGNATURE SETTINGS)



By selecting the Signatures option, you will be able to create an electronic signature, which will always be attached to the letter you are writing.

There can be two ways to add:

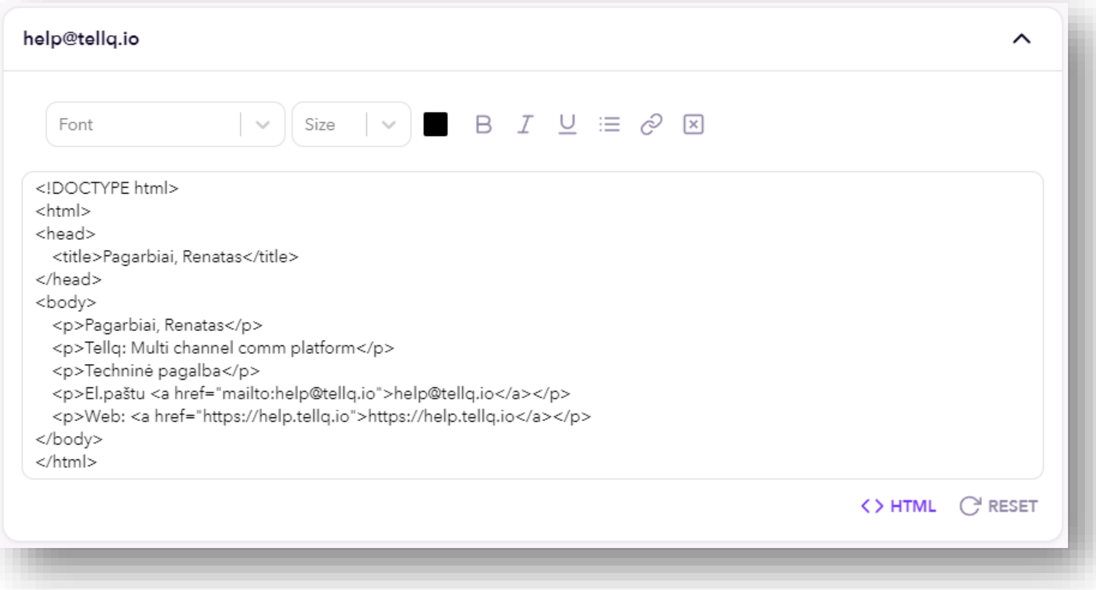
The 1st method is the Copy paste function from another source. It is very important to know that when copying a signature from another source - the pictures will not load. Pictures should be copied to the signature separately. Also, the minus of copying is that a layout may form, for this we would advise you to use html code loading.

The 2nd way is to load the < > HTML code into the system. This method is the most reliable if you want to load the signature neatly and not spoil the layout. It is important to remember that when creating a code - picture links should be under the https:// otherwise you will see an empty space in the place of the picture.

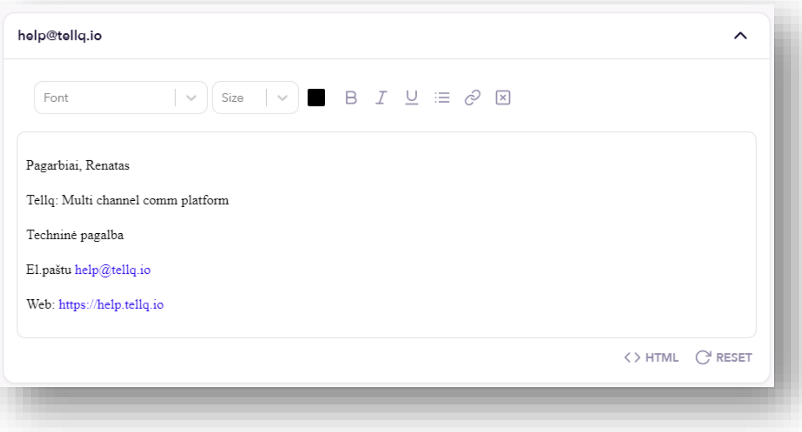
< > **HTML** method, you can upload the signature as follows:

In the corner of the table, press the badge **< > html**. When a new window opens – load your HTML code. In my example, the signature is the most elementary. If the signature is complex, the HTML code will be longer and more complex. The main thing is to maintain the correct structure of the code. It is best to use when writing code **. CSS values**.

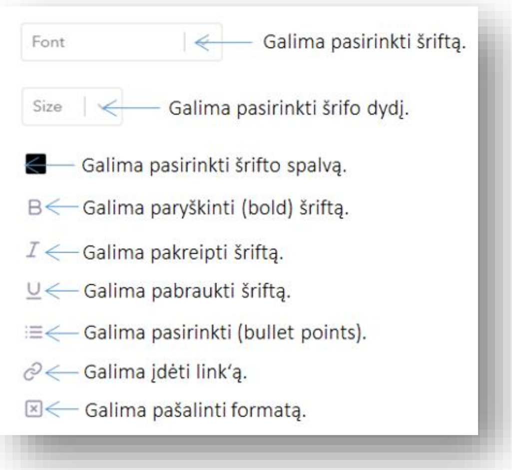
It should look something like this:



If you have uploaded the code and want to check the representation of the signature >> click **on the < > HTML** badge and you will see what your final signature looks like.

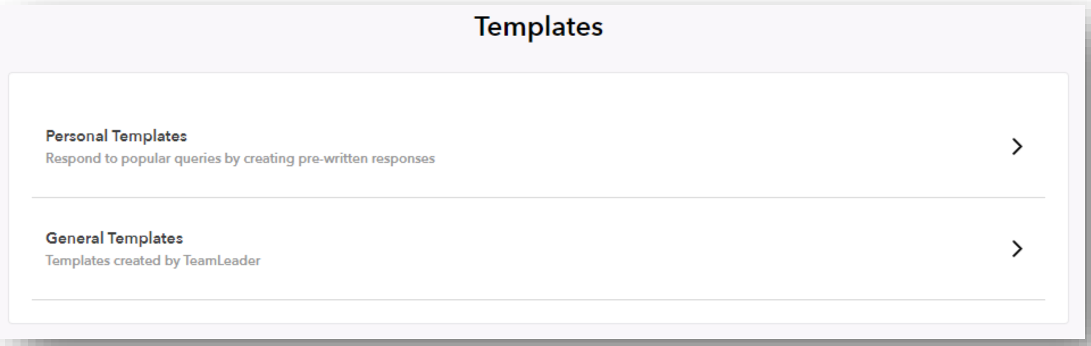


Signature table values:

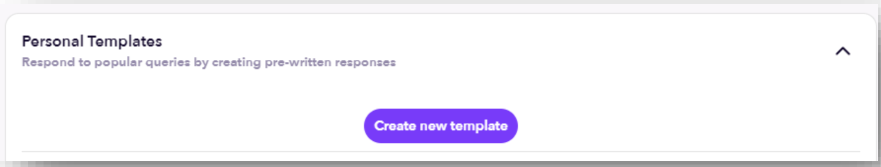


TEMPLATES CREATION

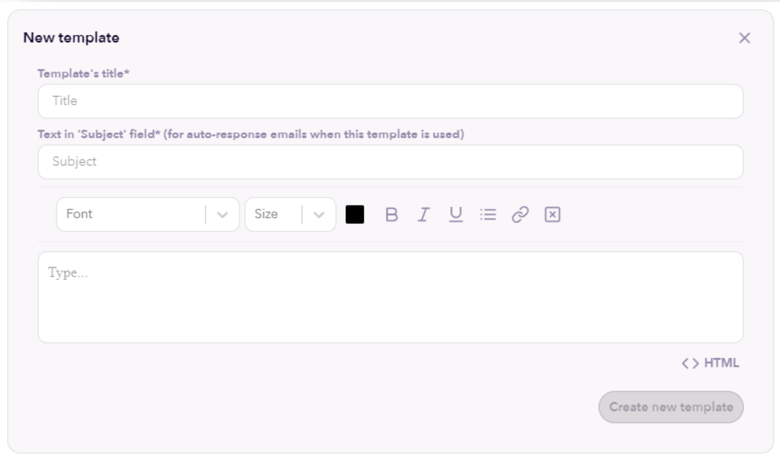
By clicking on this section, you will be able to create personal templates or - general templates that will be visible to all colleagues who use the mail modules. These templates can be used for Email / LiveChat / Messenger modules.



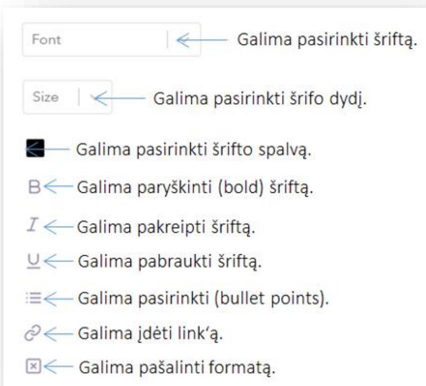
In order to create a new template (Template) >> open the desired section and press "Create new template"



A template development window will open where you can write the template by hand, upload it from other sources, or place the template < >HTML code you already have:



<u>Title</u> – The name of the template (so that it's easy to distinguish if you're not creating one). **<u>Subject</u>** – Here you can enter the name of "Subject", if you want the "Subject" section to change when you choose – the name you wrote will also be added. If you want the name of the Subject line to remain unchanged , leave this line blank.



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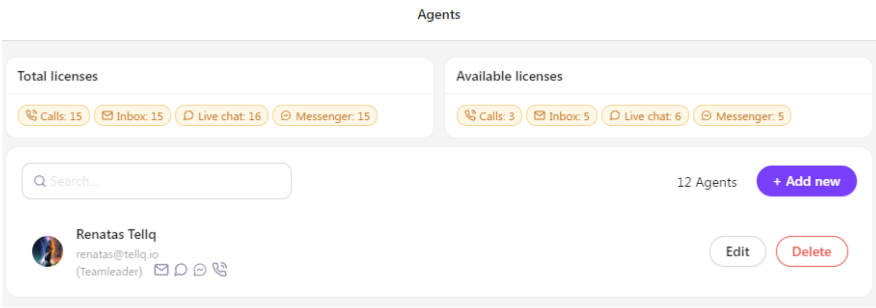
AGENTS (AGENT CREATION/EDITING/LICENSES)

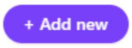
In this section, you will be able to see all the agents working with the Tellq system, as well as edit their profile information and default settings.



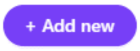
Total licenses – in this section you will see how many and what licenses you have ordered.

Available licenses – In this section, you'll see how many licenses you currently have.

If the list of agents is long, you can use this search string by entering the agent's full name.

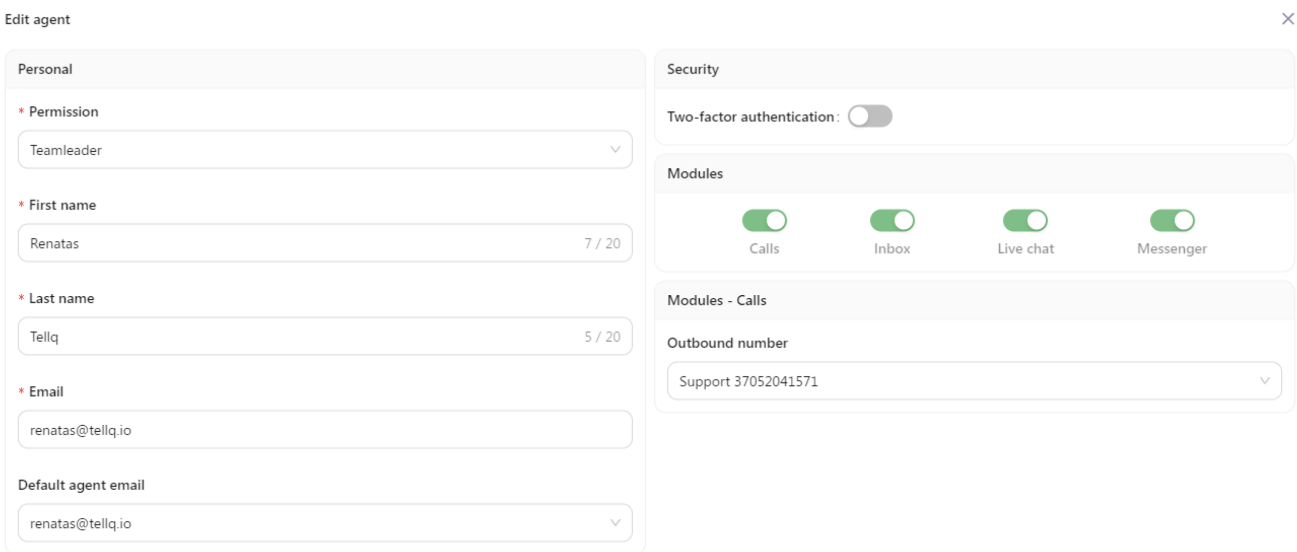
Pressing 

the button – you will start the creation of the agent. The following table should appear on the screen:

To create a new agent (if you have free licenses) – click on this button: 

To edit the agent card – click on the following button:

To remove the agent account from the system – click on the following button: 



In the First and Last name sections, we enter the agent's name (or other meanings). Both sections must be filled. You must also not exceed the character quantity of /20

In the Permission section, you can choose whether the agent you are creating will be Teamleader or ordinary Agent.

In the email section, the agent's e-mail must be entered. This mail must be active and valid (not invented).

If the agent has the Email module enabled, you should select the agent's default email box from which he will write OUT

In the Modules section, you will see all the available modules. All of them will be displayed only if you have enough licenses.

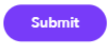
The Outbound number is a section where you can select an OUT number for an agent if the Call module is enabled for them. From this number, agents will make calls from the system.

Two-factor authentication - When this setting is enabled, the agent will have to connect to the system using double authentication.

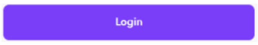
If you have entered all the data and want to create an agent - press the submit button and the agent will be created in the Tellq system. The password creation link will be sent to him to the mailing address you entered. The login name will be the email address of the agent.

TWO – FACTOR AUTHENTICATION SETTING

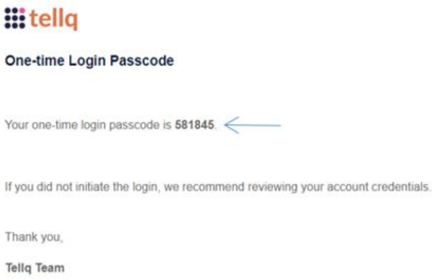
To enable this authentication method – Press   and enable the following setting: 

When you turn on the setting – press the button  . Pressing this button – the setting will be enabled and the agent will be immediately disconnected from the Tellq system.

From now on, in order to log in to the system , he will need to enter a 2-FA code. Everything will go like this:

The agent enters the logins of his account and presses the  button. If the data is correct, a table will immediately pop up asking you to enter the code:

Important: The 2FA code will be sent to the e-mail - in the form of a letter.

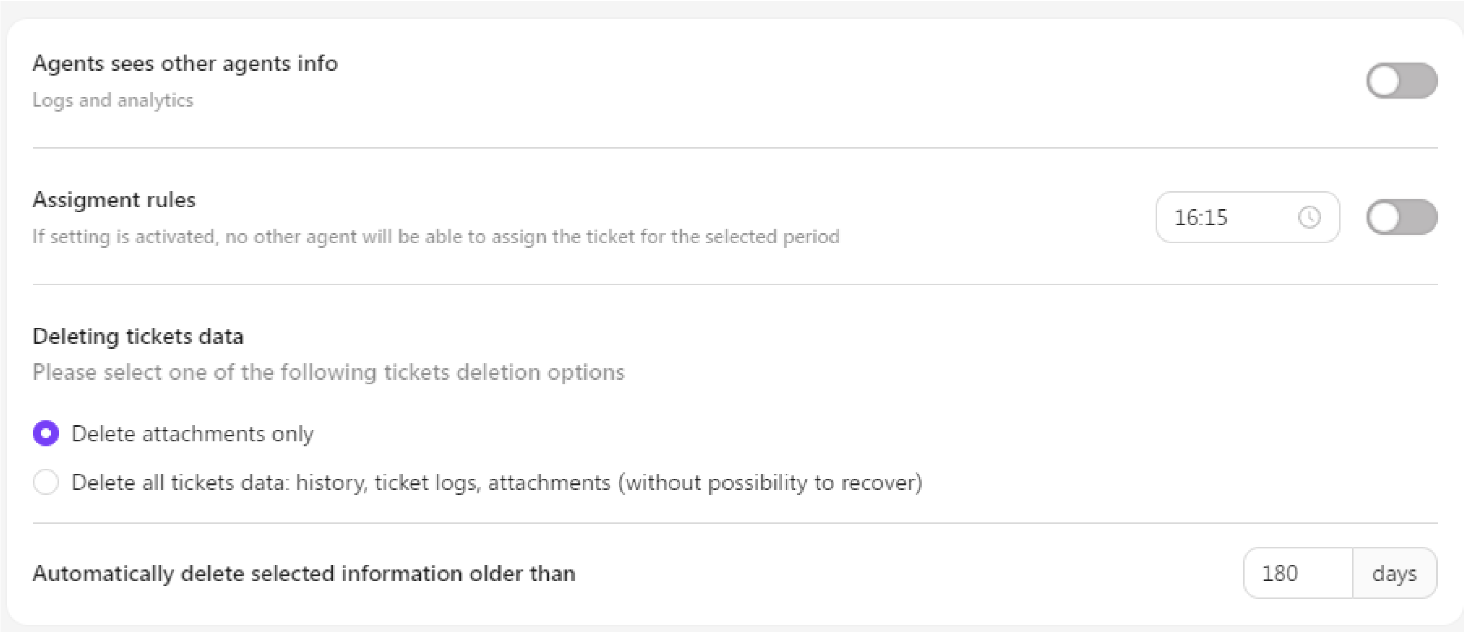


After entering the received code – the agent should log in to his account. This process will have to be repeated every time you try to log in to the Tellq system again.

2FA is on - You'll see a message next to the agent's name:

In order to disable 2FA authentication for agent – do identical actions described above, just instead of enabling – disable this functionality.

GENERAL SETTINGS



Agents sees other agents info – You can additionally enable the feature so that not only Teamleader, but also each agent sees the statistics of their colleagues.

Assigment rules – An example of this feature: Agent 1 assigns a ticket to himself → Agent 2 cannot assign the same ticket to himself for a specified period of time.

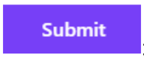
Deleting tickets date - Mail deletion settings.

EMAIL CHANEL SETTINGS

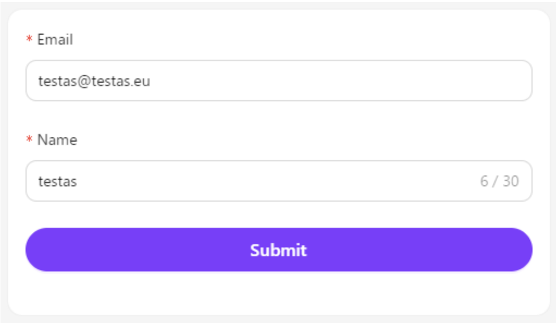
In this section, you can add e-mail inboxes (the quantity is not limited). To add a mailbox , follow the steps below:

To add a mailbox, click

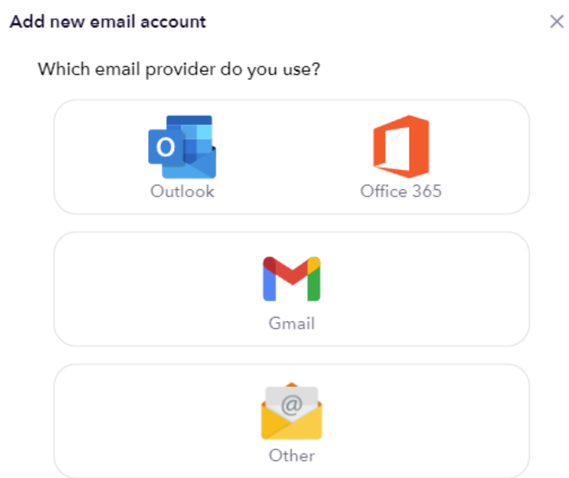
the symbol.

In the table that popped up, type the address and name of the mailbox. Once you've done that, press the button 

:



After clicking on the "Submit" button, the system will ask you in what way you want to add your existing mailbox:



The ways to add a mailbox are as follows:

1. Add **an OUTLOOK/OUTLOOK 365** mailbox by using API integration.

2. Adding a **GMAIL SMTP** mailbox using the SMTP protocol.

3. **Adding a different mailbox** using custom settings and SMTP protocol. All boxes for which SMTP is not disabled.

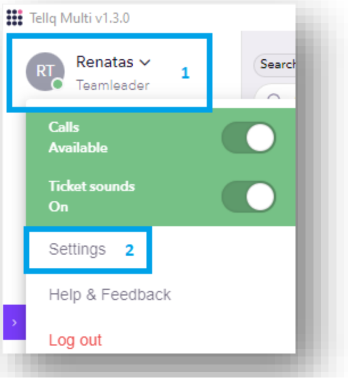
To add an Outlook mailbox using the API , select one of the following choices:

Option 1 - Simple Outlook mailboxes.

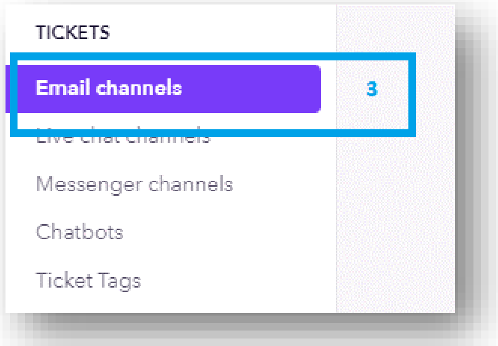
2nd Choice – New Outlook 365 mailboxes

ADD A NEW OUTLOOK MAILBOX (THROUGH API INTEGRATION)

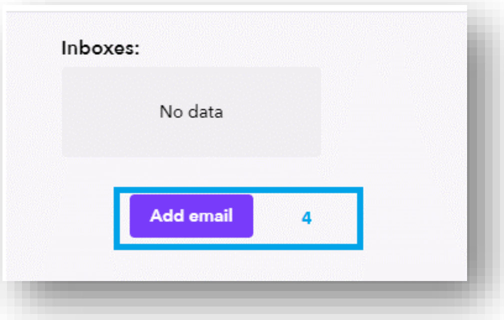
Click on your teamleader name **(1)** and go to settings >> settings **(2)**



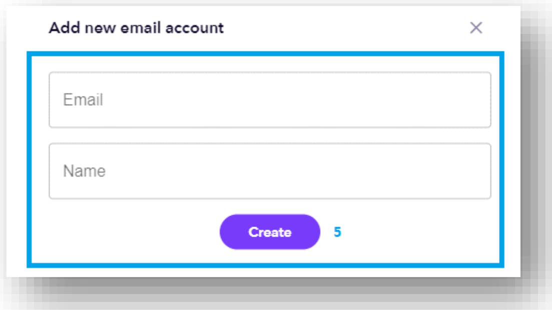
In the settings window that opens, press email channels **(3)**



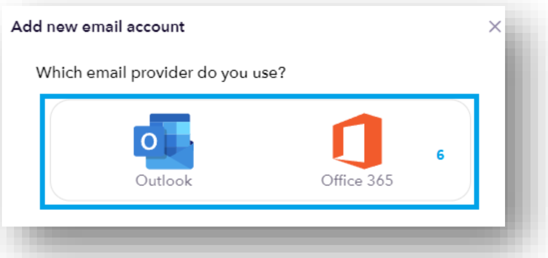
Under Inboxes, press add email **(4)**



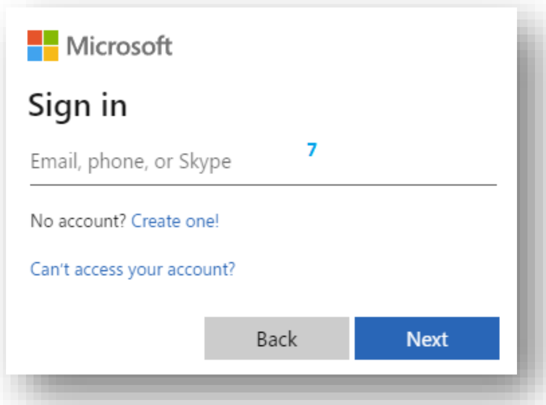
Enter your new mailbox details and click create **(5)**



In the table that pops up, select the type of Outlook mailbox you are using (365 or Plain Outlook) **(6)**



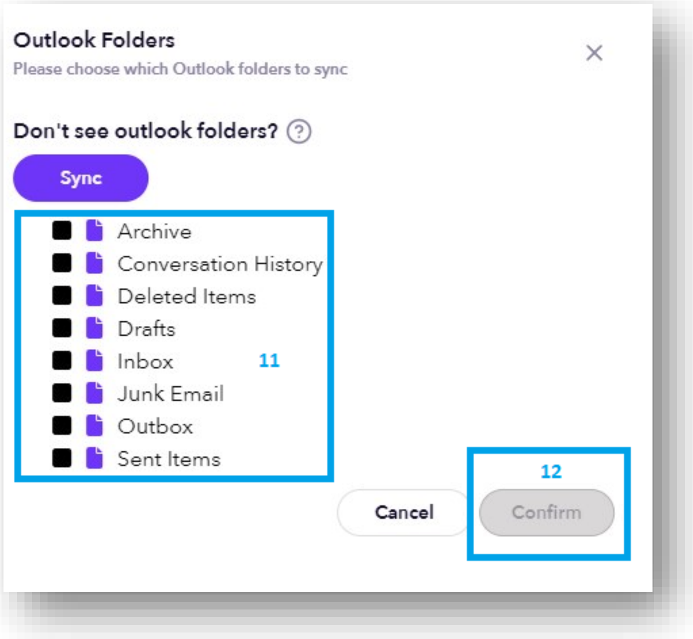
In the login window that opens **(7)**, **enter the logins of your main outlook admin** (the main admin is the one that manages the licenses and settings of all mailboxes (Global admin)):



With the correct entry of main admin logins, you should log into your box about successful login should be indicated by the following table **(8)**

Sometimes a permission approval table pops up, where you need to press confirmation.

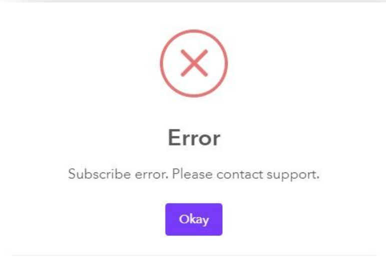
After **completing (10)** the item, a table should pop up in which you need to choose from which outlook folder the tellq system will be able to pick up the messages **(11)**



After selecting the desired folders >> click confirm **(12)**

THE MOST COMMON ERRORS AND THEIR CORRECTION (USING THE OUTLOOK API)

1.SUBSCRIBE ERROR:

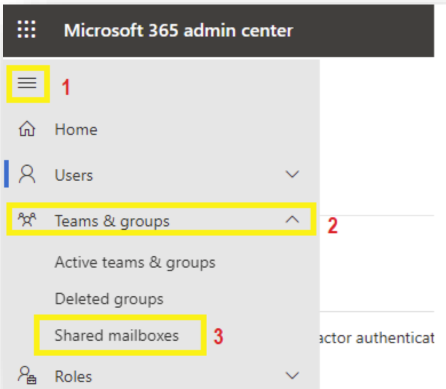


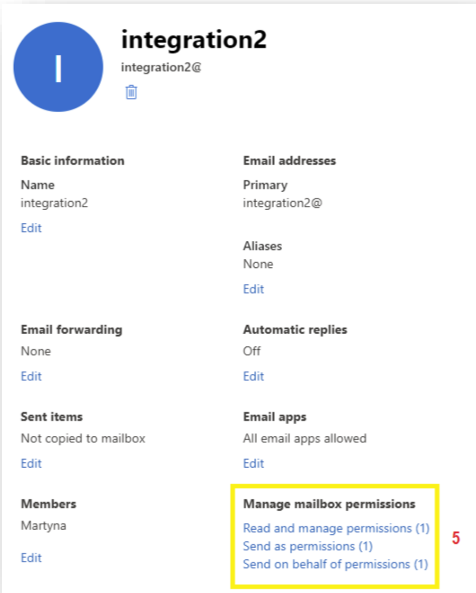
You receive this type of error when you try to add a mailbox without **having to manage mailbox permissions**

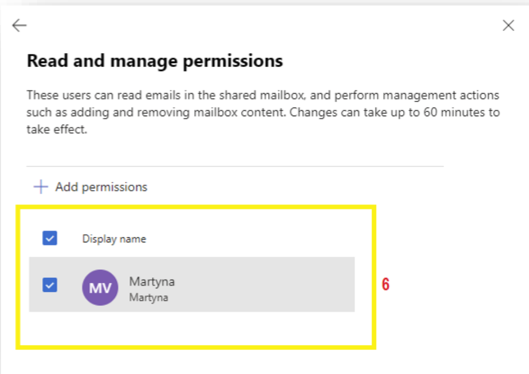
The following settings should be searched by logging in to the main admin, in the following location **(If the attached mailbox is of the shared type):**

LOG IN TO (GLOBAL OUTLOOK ADMIN PAGE): **https://admin.microsoft.com/#/homepage**

1. Press the three dashes in the upper left corner.
2. Select teams and groups.
3. Select shared mailboxes
4. Select a mailbox.
5. In the **manage mailbox permissions** section, put all 3 permissions in the global admin account.
6. This should be done by clicking on each permission and selecting the global admin account:

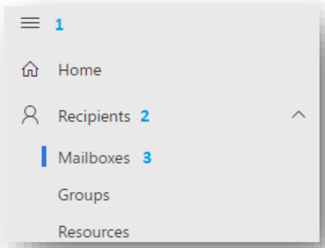




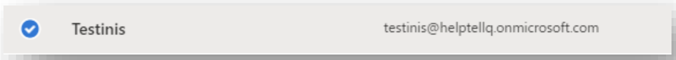


IF THE OUTLOOK MAILBOX IS NOT SHARED TYPE, BUT FULLY LICENSED

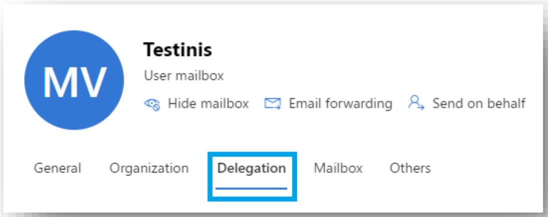
1. Log in to the admin exchange portal: https://admin.exchange.microsoft.com/#/mailboxes
2. Press the three dashes in the upper left corner **(1)**
3. Click on recipients **(2)**
4. Click on the mailboxes **(3)**



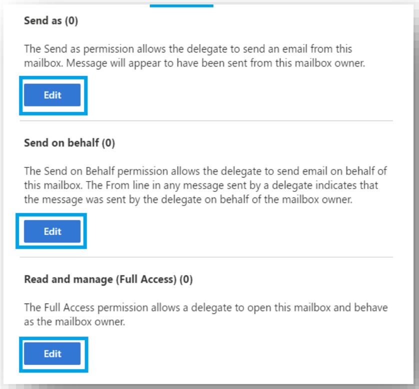
5. In the Mailboxes section, we select the licensed box that we want to add to the tellq application:

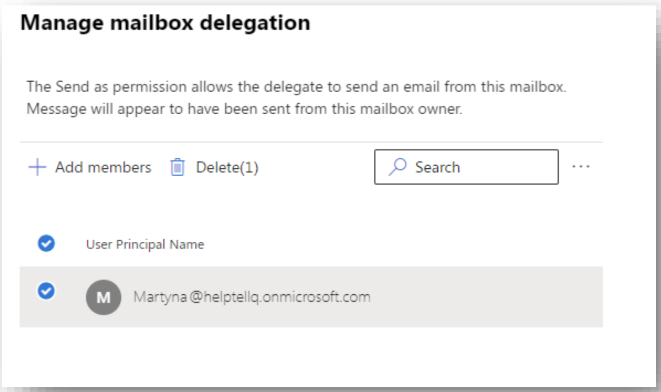


6. In the user table that opens on the side, press delegation:



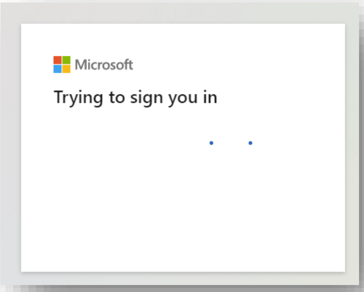
7. Grant permissions, as in the shared mailbox instruction:





Important: All three permissions must be in the main (global) system admin.

2. DOES NOT ALLOW TO WRITE ADMIN LOGIN:



You go through all the steps to add a new mailbox to point 6, but instead of the 7-point table (admin login), the >> system is trying to connect to some kind of system-memorized logins on its own.

1. Make sure you are logged out of all microsoft outlook accounts on your computer:

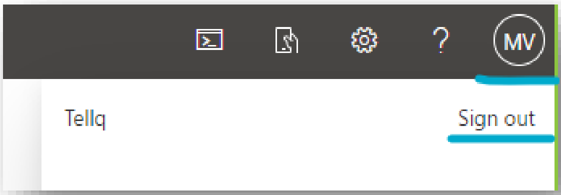
https://admin.exchange.microsoft.com/

https://admin.microsoft.com/#/homepage

https://outlook.office.com/mail/

https://www.office.com/?auth=2

2. In the mailbox, in the upper right corner, click on your user initials and log out:



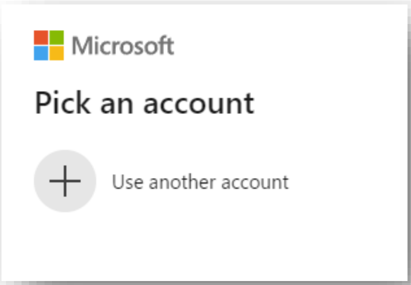
3. When you log out of accounts, log in to the tellq web page (not the application) at the address:

https://multi.tellq.io/

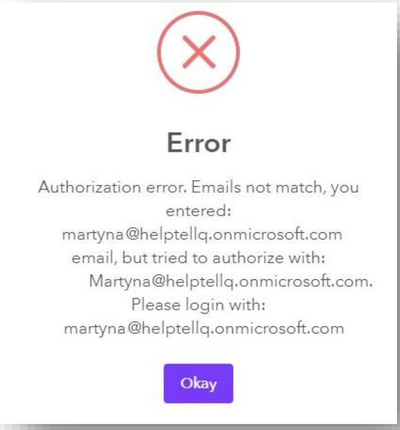
AFTER LOGGING IN, PRESS CTRL + R

4. Follow all the steps to add a mailbox as described on the second page.

If all goes well, it should allow you to connect and display the following table:



3. AUTHORIZATION ERROR:



You try to add a mailbox, you enter the correct data, but you get this type of error.

This happens when you are not typing as logical as is specified in the admin account. If you want to check how correct the login should be saved, you need to log in to one of the following links:

https://admin.exchange.microsoft.com/

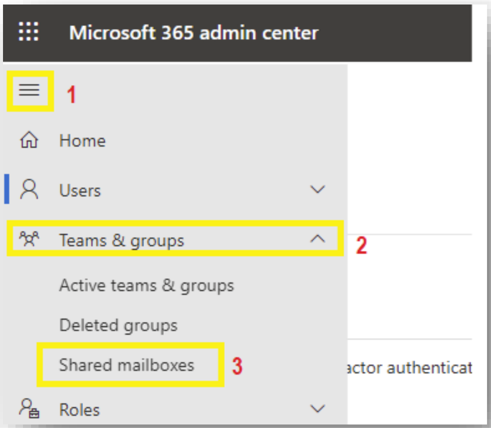
https://admin.microsoft.com/#/homepage

1. For example, you chose to sign in to https://admin.microsoft.com/#/homepage

2. Press the three dashes in the upper left corner.

3. Select teams and groups.

4. Select shared mailboxes

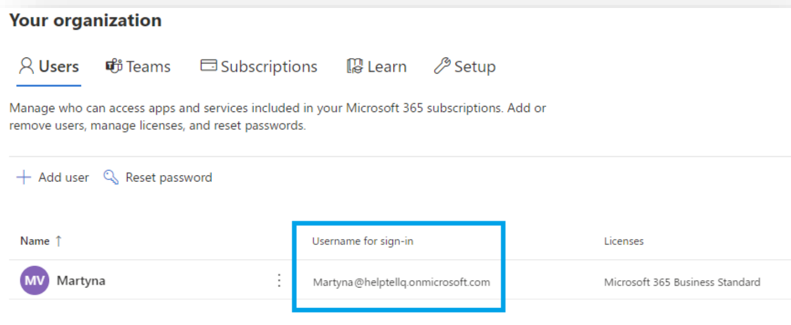


5. See how your account is named.

In my example, you can see that I tried to add a mailbox by typing its address from a lowercase letter:

martyna@helptellq.onmicrosoft.com

However, in the admin account, you can see that the name of the user's mailbox is from a capital letter:



Try adding the mailbox to the tellq system again, only this time enter the name of the mailbox as is set in the admin account.

If you did everything right - the mailbox should contribute immediately.

4. YOU HAVE ADDED THE INBOX SUCCESSFULLY, BUT YOU DO NOT RECEIVE EMAILS:

This can only happen in one case.

It is possible that you forgot to mark, or incorrectly marked the folder in the mailbox from which the system will take mail.

1. When you are in the tellq app, click on your name.

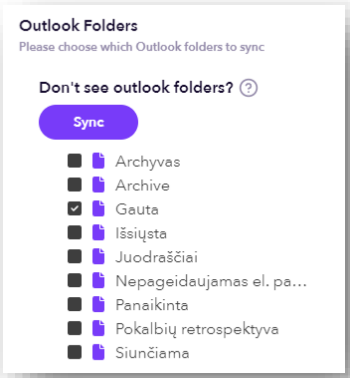
2. Press settings.

3. In the Tickets tab, select email channels.

4. Select the mailbox you have added.

5. Go to the Outlook folders tab.

6. Select the outlook folders you need (put a checkmark) and click sync



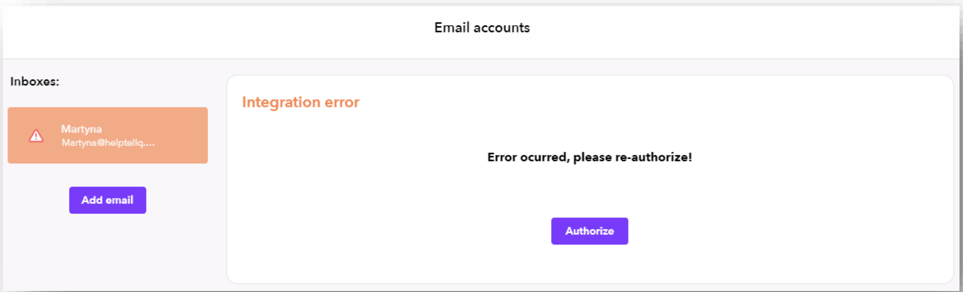
7. When you press **Sync**, additionally press **ctrl +R in** the app to reboot everything.

8. After following these steps, check if you are receiving incoming mail.

5. THE MAILBOX HAS STOPPED WORKING AND YOU NO LONGER RECEIVE LETTERS:

This can only happen in one case.

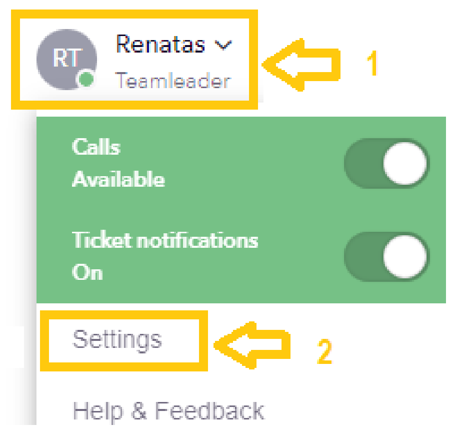
It is possible that the primary admin has changed the password and the added mailbox has lost access. In this case, you will see the following error when you log in to the Teamleader account and at the mailbox to which you are not receiving mail:



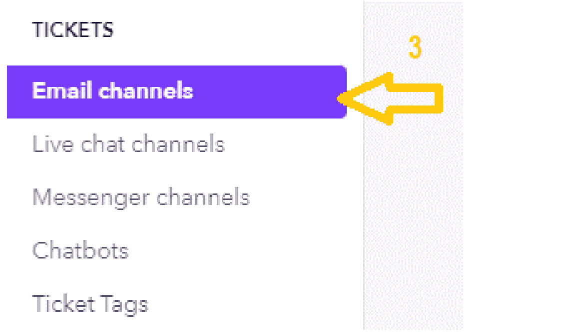
Press **authorize** and log in with the new admin logins.

REAUTORIZE AN EXISTING OUTLOOK MAILBOX (USING THE NEW OUTLOOK INTEGRATION)

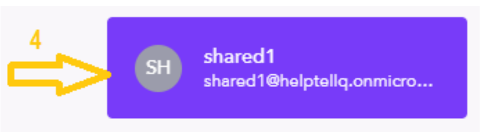
CLICK ON YOUR TEAMLEADER NAME (1) AND GO TO SETTINGS >> SETTINGS (2)



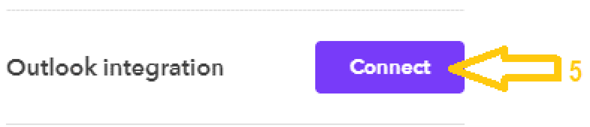
IN THE SETTINGS WINDOW THAT OPENS, CLICK ON EMAIL CHANNELS (3):



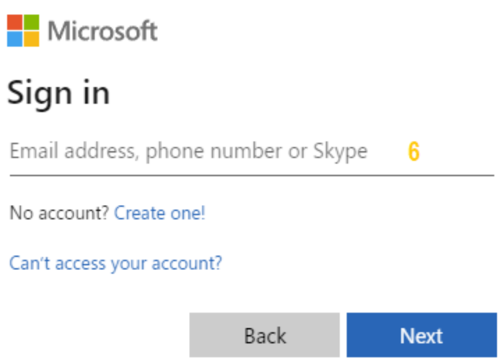
IN THE EMAIL CHANNELS WINDOW THAT OPENS CHOOSE OUTLOOK 365 MAILBOX TO WHICH YOU WILL WANT TO CUSTOMIZE YOUR NEW TELLQ OUTLOOK INTEGRATION (4)



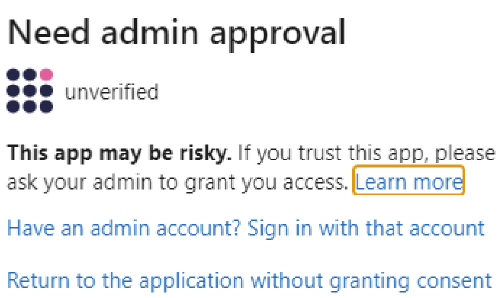
IN THE MAILBOX SETTINGS WINDOW THAT OPENS, CLICK CONNECT (5) BESIDE THE SECTION OUTLOOK INTEGRATION:



IN THE LOG IN WINDOW THAT OPENS (6) ENTER YOUR MAIN OUTLOOK ADMIN CONNECTIONS (MAIN ADMIN IS THE ONE WHO MANAGES ALL MAIL BOX LICENSES AND SETTINGS):



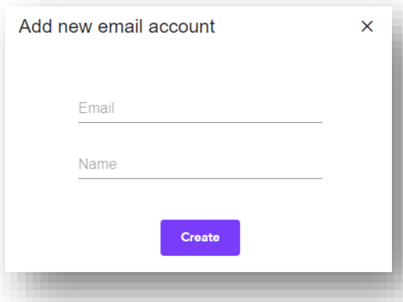
7 WHEN YOU LOG IN - YOU SHOULD GET A CONFIRMATION WINDOW (SECURITY CONFIRMATION FOR TELLQ APP) - IT ONLY SHOWS TO THE MAIN ADMINISTRATOR OF ALL MAILBOXES. IF YOU TRY TO LOG IN WITH A OTHER THAN THE PRIMARY ADMINISTRATOR LOGIN, YOU WILL RECEIVE A MESSAGE LIKE THIS:



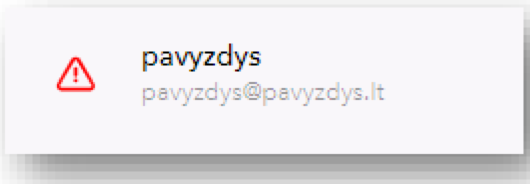
IF YOU SEE THIS MESSAGE, TRY TO LOG IN WITH ADMINISTRATOR LOGIN OR CONTACT YOUR MAIL SERVER ADMINISTRATOR TO PROVIDE THOSE LOGIN.

8 WHEN YOU HAVE DONE EVERYTHING SUCCESSFULLY, **TURN OFF THE FORWARD FUNCTION IN THE MAILBOX (WHICH YOU JUST SET UP)**. THIS STEP IS VERY IMPORTANT FOR THE MAIL BOX TO CONTINUE TO FUNCTION PROPERLY.

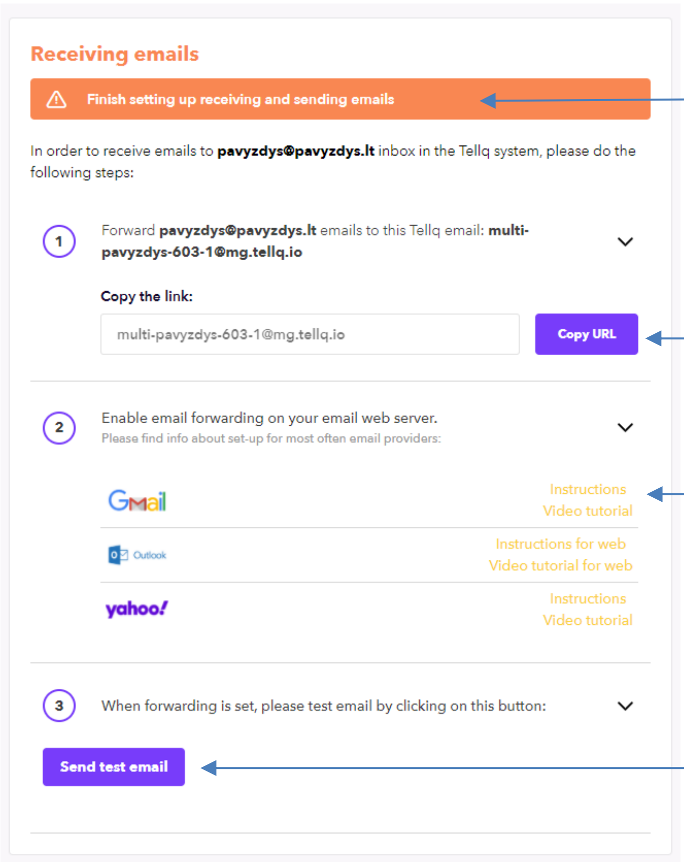
ADD GMAIL MAILBOX (SMTP SETTINGS)



<u>Add an existing GMAIL mailbox to the TELLQ</u>



It's important to know: When you add a mailbox , a red exclamation mark lights up to it. This red exclamation mark means that the mailbox has not yet been set up and you need to configure it.



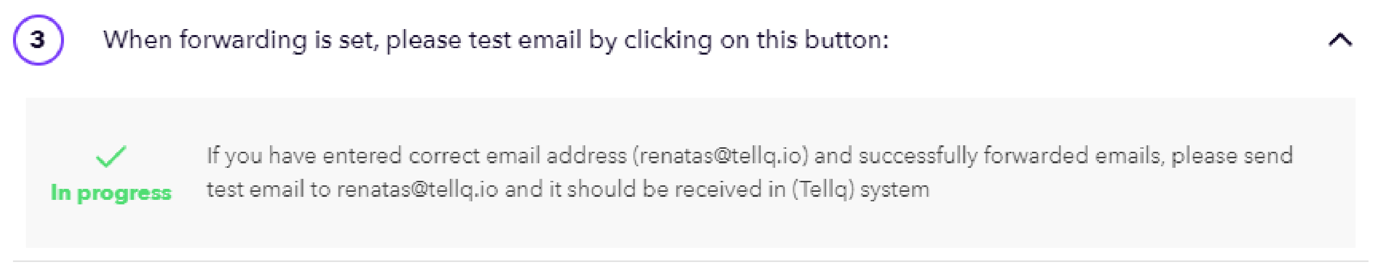
Message means that you need to complete the mailbox configuration.

In the settings of your mail web server, you need to set the "FORWARD" function for incoming messages to the specified system link.

Check out the instructions on how to set up FORWARD on your web server. Keep in mind that these instructions are examples of specific mailboxes – your situation may vary.

<u>If the mailbox is different from this example</u>, you should contact your IT specialist to adjust the mail server settings according to the requirements.

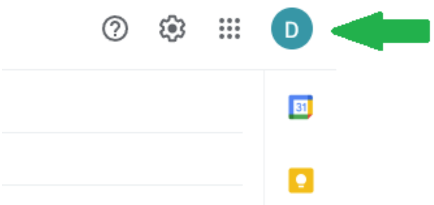
After setting the settings, press this button and if all goes well you should receive a test format message that confirms that mail forwarding is enabled successfully.



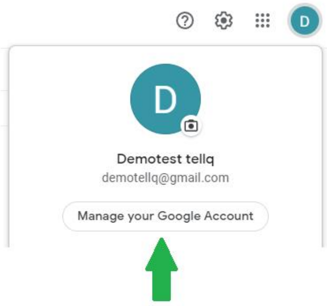
Date of preparation of the instruction: 2024-08-26

The next steps >>> go to the https://mail.google.com and log in to your original mailbox.

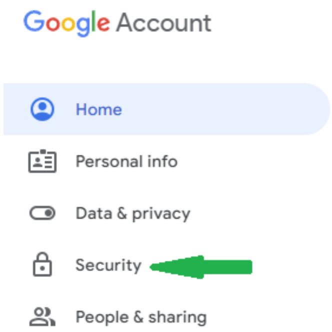
1. Click on the ball with your initials.



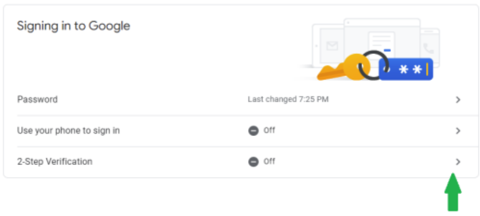
2. Press "Manage your Google Account"



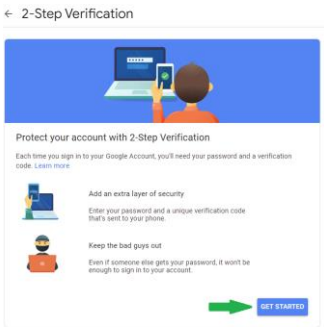
3. Open the Security window.



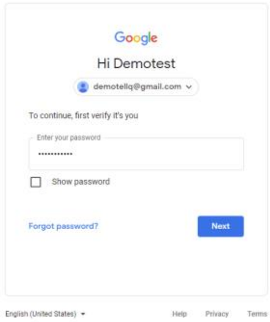
4. Select "2-Step Verification"



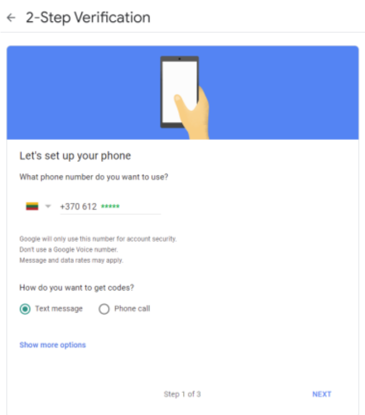
5. Press "GET STARTED"



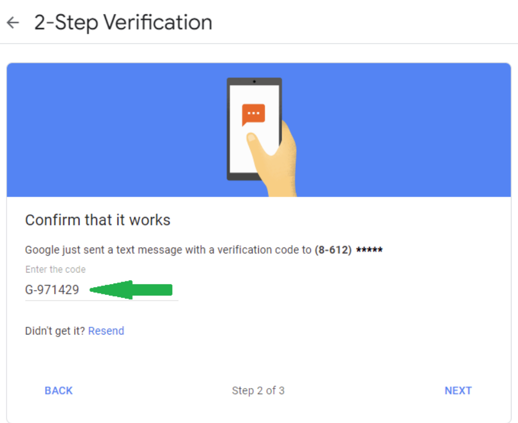
6. Log in again:



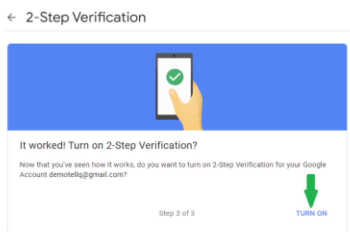
7. In the window that opens, enter your phone number and select how you would like to receive the identification codes >> click "Next":



8. Enter the code received on your phone and click "Next":

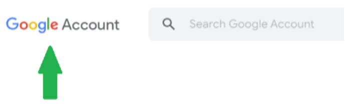


9. Press Turn On to enable 2-step vertification:

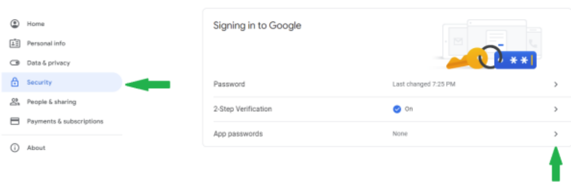


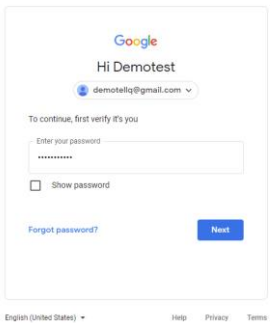
12. Log in again:

10. In the upper left corner of the window, press Google Account:

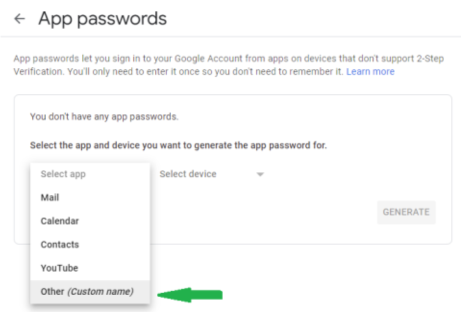


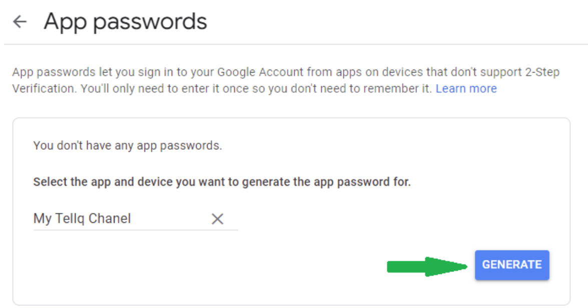
11. In the "Security" section, go to "Signing in to Google" and select "App Passwords":



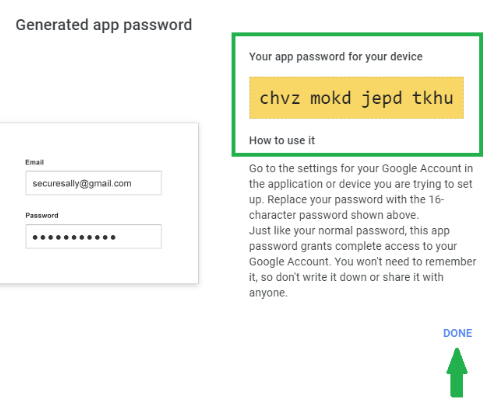


13. Chose Select App >> Other and after entering the invented name, click on the Generate >>:



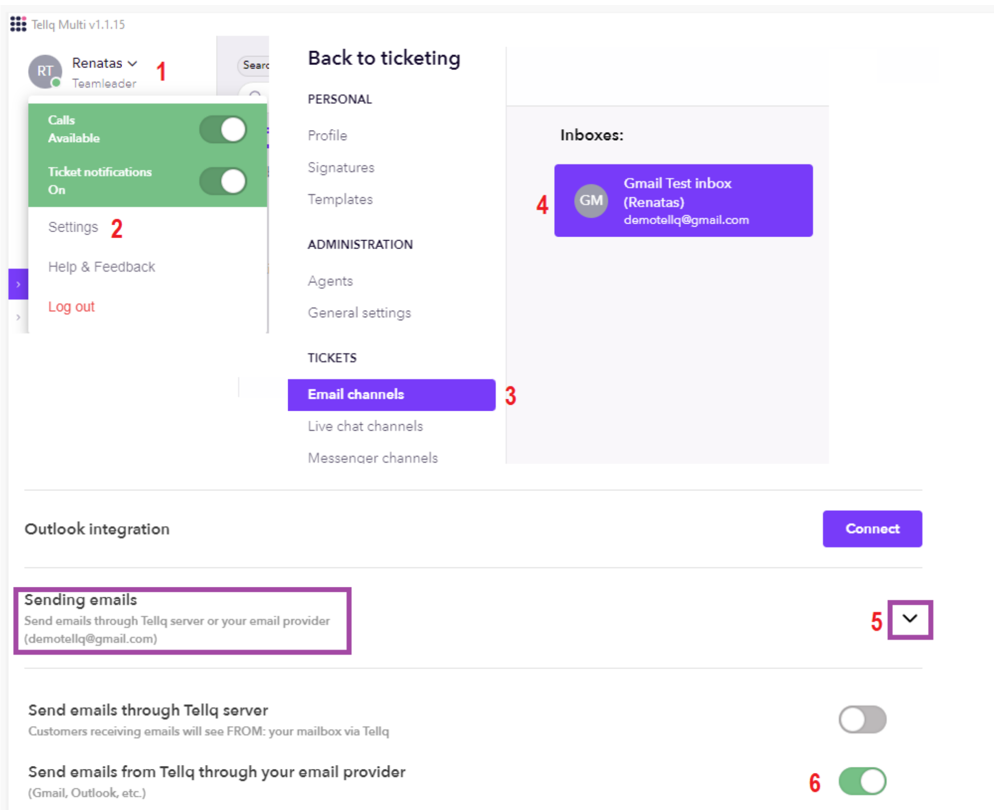


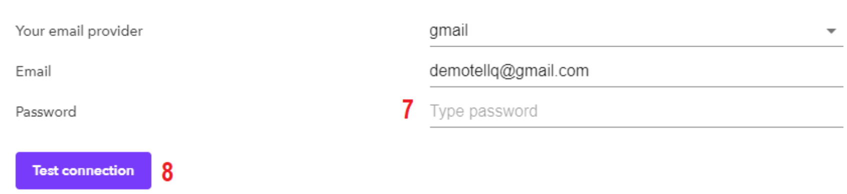
14. The system will generate your mailbox password for you >> Copy it or save it:



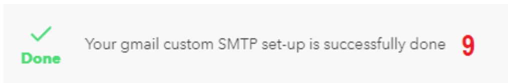
Congratulations – you have enabled the dual authentication setting >> your Gmail inbox.

Next, follow the instructions for the Settings of the Tellq app:

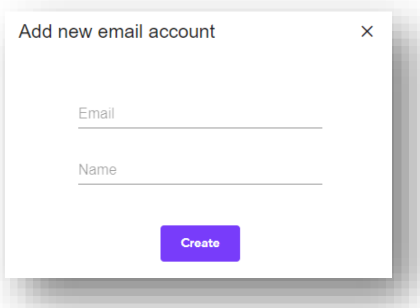




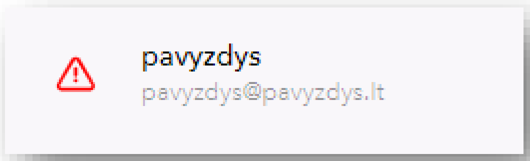
1. Click on your name.
2. Press settings.
3. Select Email channels.
4. Select your Gmail inbox.
5. Find the Sending emails and press the down arrow next to it to expand the selections.
6. Enable the setting "Send emails from Tellq through your email provider.
7. Select GMAIL and enter the generated 2FA password.
8. Press Test connection.
9. If you see a message in the system window: "Your gmail custom SMTP set-up is successfully done" – Your mailbox has been successfully configured.



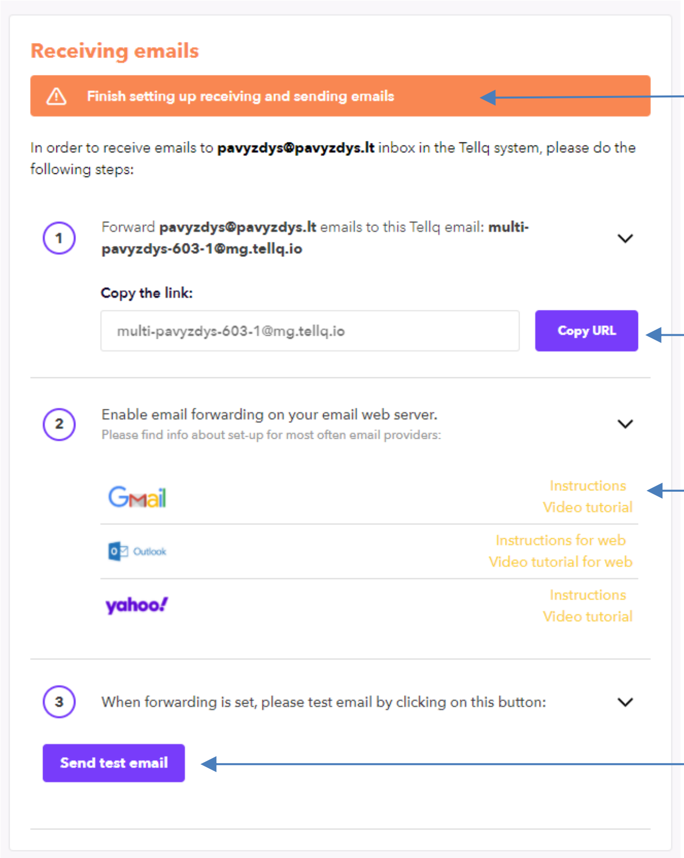
ADD OTHER MAILBOXES (SMTP SETTINGS)



Add an existing mailbox to the TELLQ system.



It's important to know: When you add a mailbox , a red exclamation mark lights up to it. This red exclamation mark means that the mailbox has not yet been set up and you need to configure it.



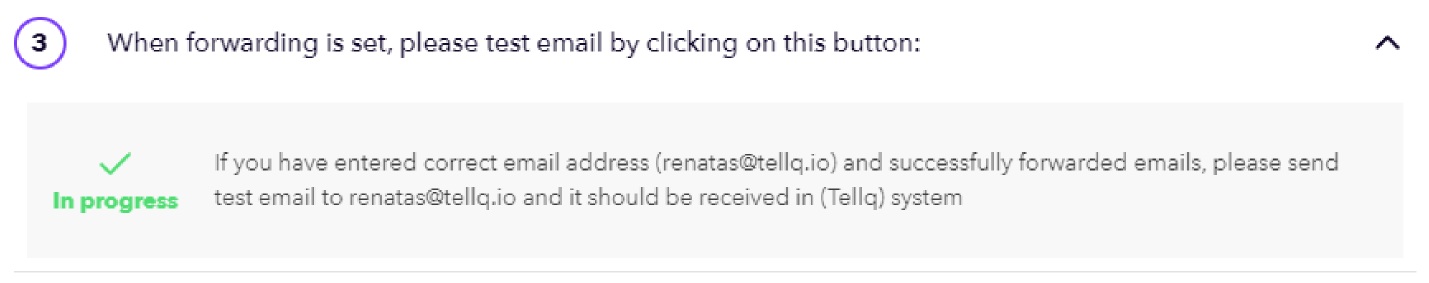
Message that you need to complete the mailbox configuration.

In the settings of your mail web server, you need to set the "FORWARD" function for incoming messages to the specified

Check out the instructions on how to set up FORWARD on your web server. Keep in mind that these instructions are examples of specific mailboxes – your situation may vary.

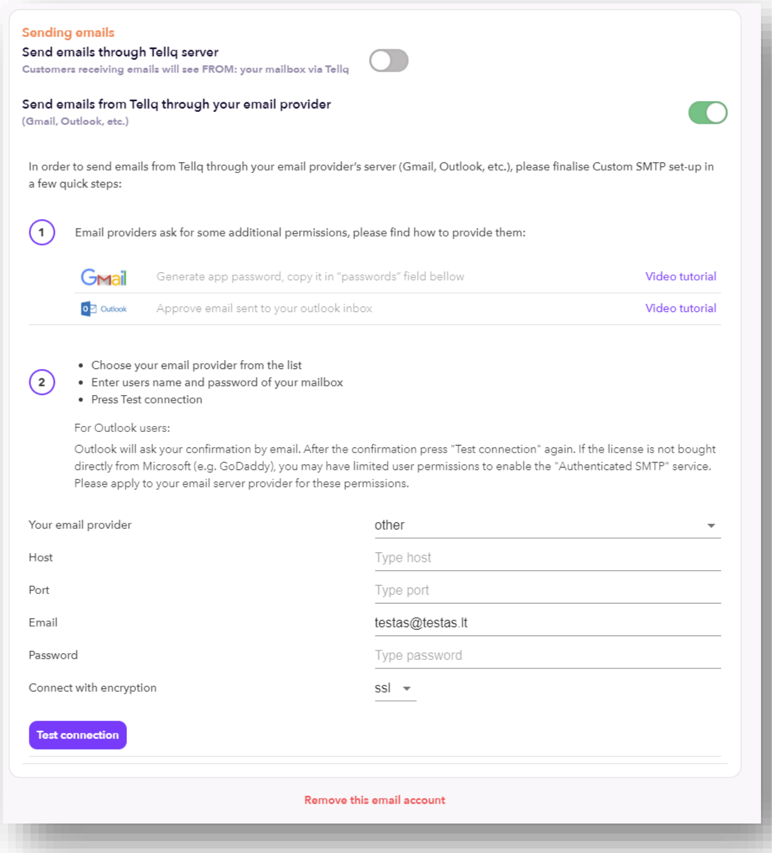
If the mailbox is different from this example, you should contact your IT specialist to adjust the mail server settings according to the requirements.

After setting the settings, press this button and if all goes well you should receive a test format message that confirms that mail forwarding is enabled successfully.

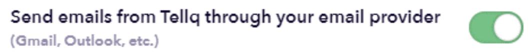


SMTP settings for a different type of mailbox:

Click on your mailbox that you added and go to the section 

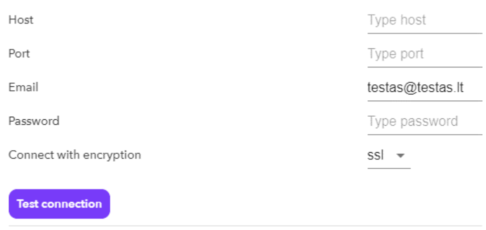


Enable the following setting:

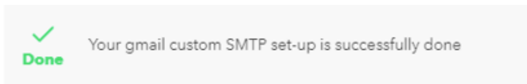


In this section, select OTHER:

Fill in the other necessary information and press Test Connection:

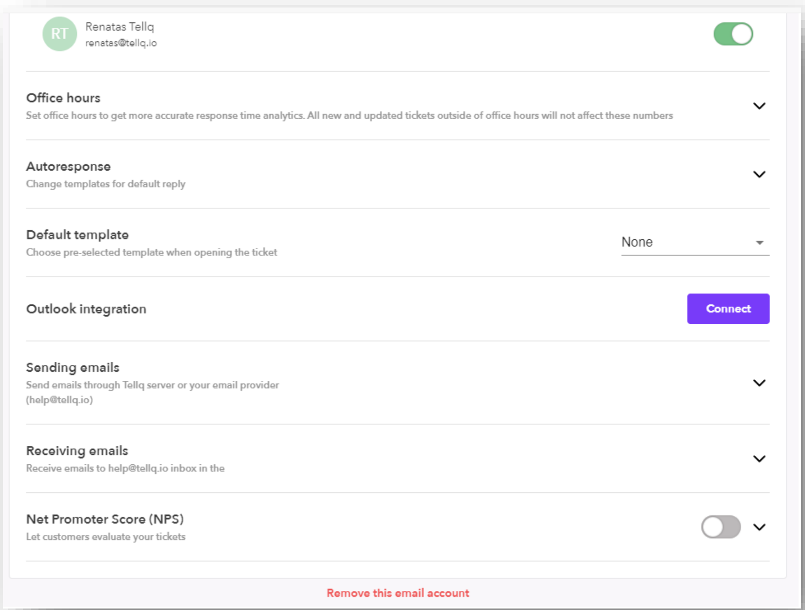


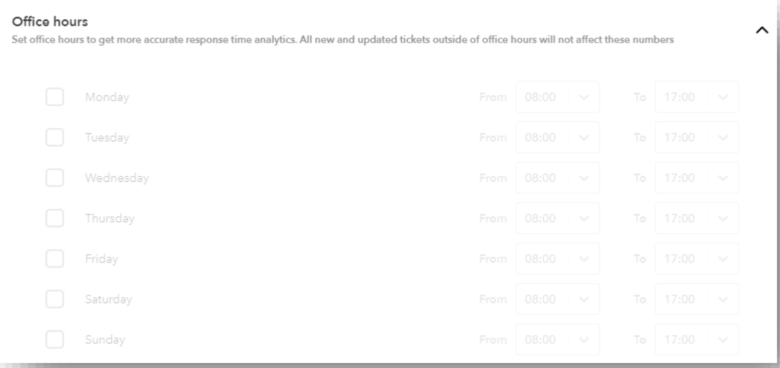
If all goes well , you should see the following inscription:



CONNECTED MAILBOX SETTINGS

<u>If the settings are successful - the following window should appear in which you can enable mailbox access and other settings:</u>

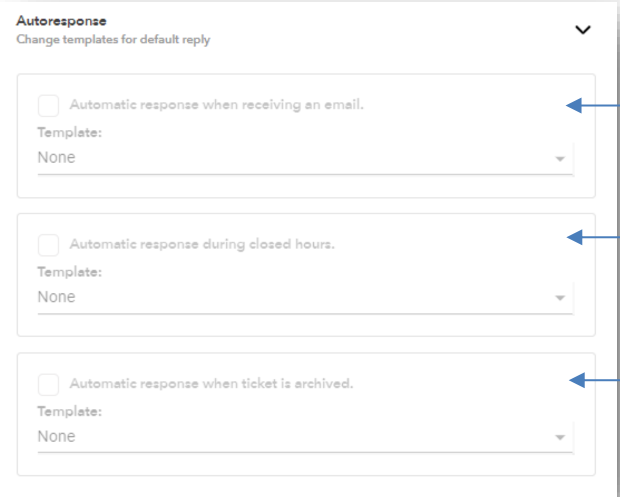




Operating time settings:

Determine the working time to get a more accurate analysis of the time of response to the letter - in statistics.

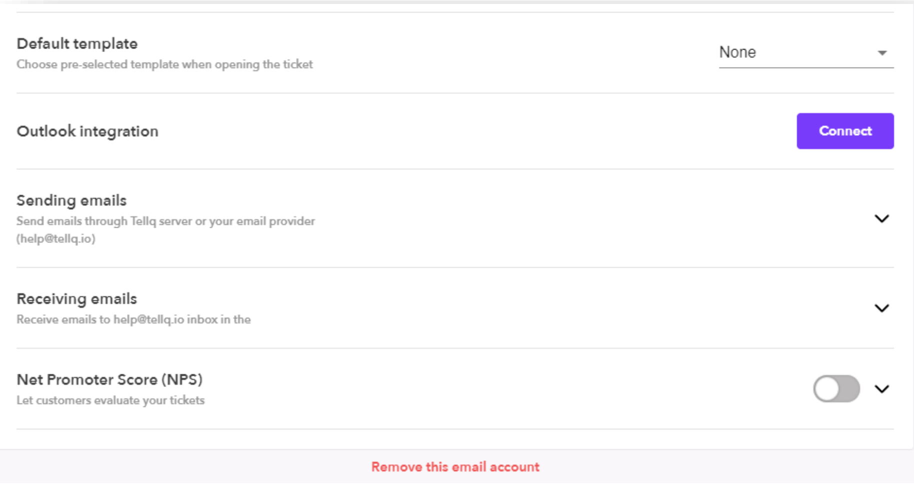
All new and updated Tickets will not affect the display of statistics outside of business hours.



You can set up <u>an automatic message to the sender as soon as you receive a message from them</u>. For example: "Hello, Your letter has been received. We will answer in the near future.

You can set up <u>an automatic message to the sender as soon as you receive the message outside of business</u> hours.You can create a template in "Personal templates". For example: "Hello, Your letter has been received. We will answer in the near future.

You can set up <u>an automatic message to the sender as soon as you archive the message</u>. For example: "Hello, Your letter has been received. We will answer in the near future.



Default template - You can set <u>an automatic email to the sender as soon as you open the received letter</u>. For example: "Hello, Your letter has been received. We will answer in the near future.

Outlook integration – In this integration, only Outlook mailboxes can be connected (Using the API).

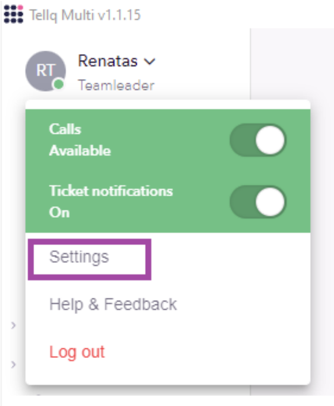
Sending Emails / Receiving Emails – Internal mailbox settings.

NPS promoter score (NPS) – Mail evaluation settings.

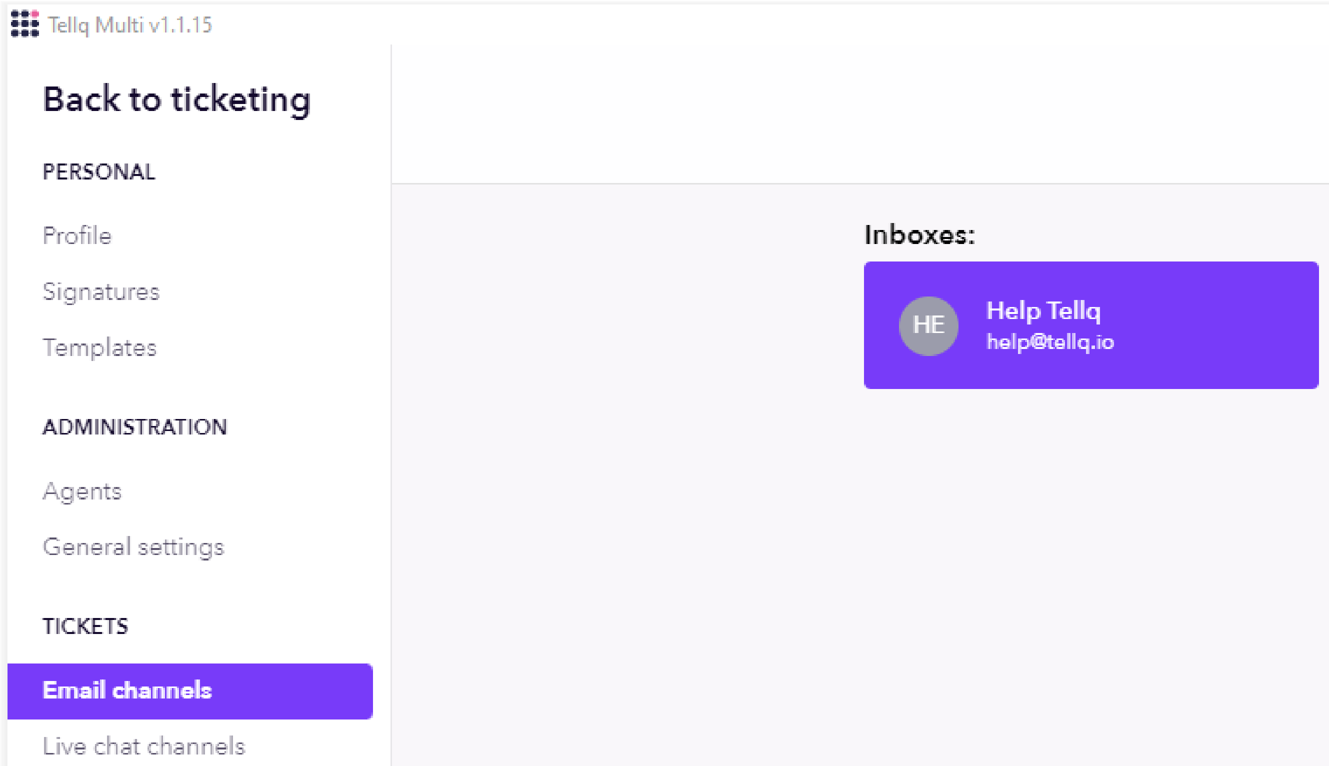
Remove this email account – Remove the attached mailbox.

NPS TICKETS EVALUATION SETTINGS (NPS promoter score)

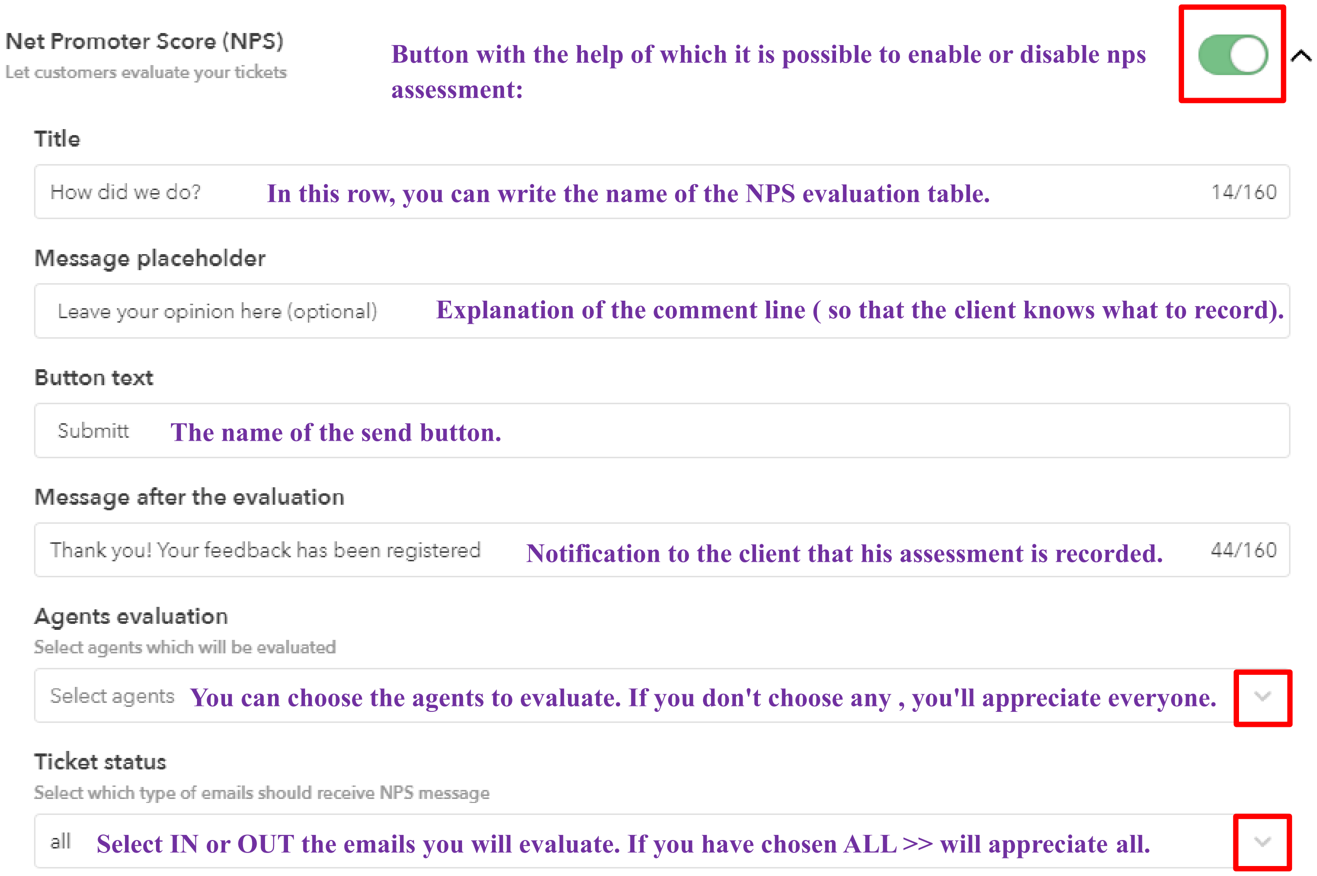
Click on your name – on the left, in the upper corner of the window and select **settings.**

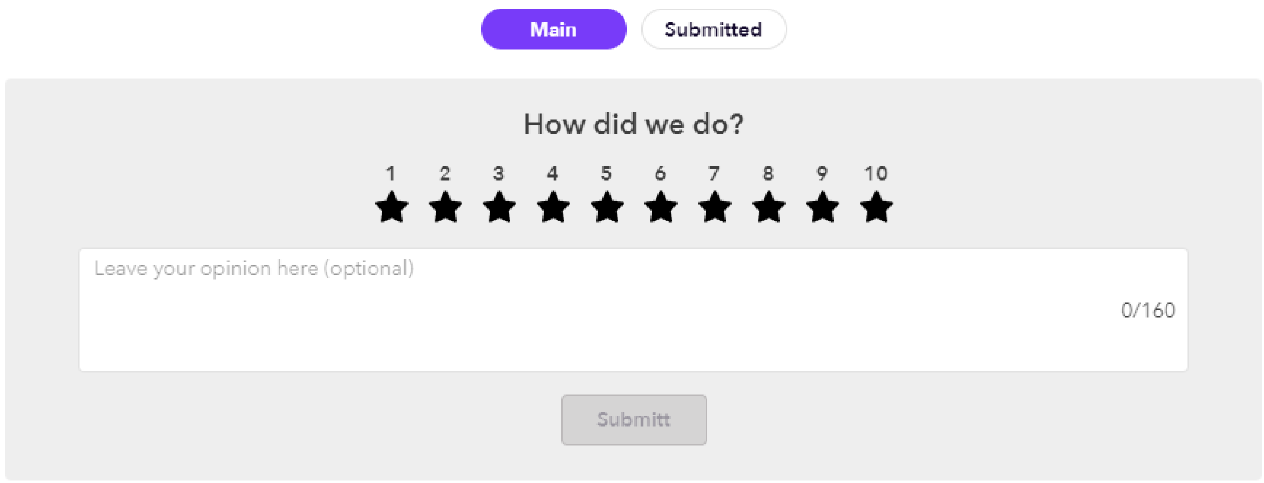


In the settings window that opens, select **Email Chanels** and select the mailbox for which you want to enable NPS assessment:



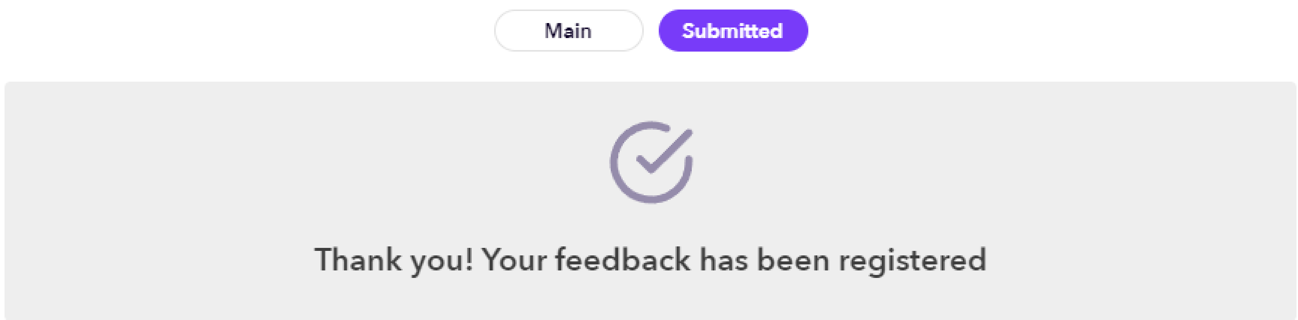
At the bottom of the window (in the mailbox settings) you will see the NPS settings. **Expand them by pressing the highlighted arrow symbol**:





In this table, you can see in real time what your assessment table will look like. When making changes in the described settings, the values in the table also change.

When you press **Main** , you'll see what the image of the scoring table will look like at the beginning (control image).
After clicking **Submitted,** you will see how the table will look after the customer's assessment (control image).



THE COURSE OF THE NPS TICKETS EVALUATION

After setting the NPS settings – enable the NPS function at the top of the window **(the first button described).**

After switching on, you can test the performance of the function.

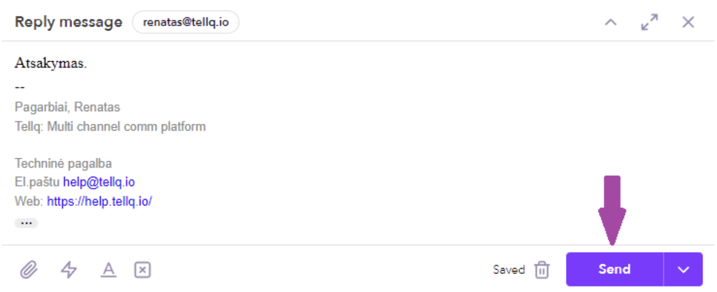
According to the example of the instruction that we provided, all agents in the mailbox will be evaluated (we did not select anything in the Agents evaluation table, so they will evaluate all agents assigned to the selected mailbox).

We have selected ALL in the Ticket status line, so IN and OUT letters will also be evaluated.

How is the assessment itself going?

1. You receive a letter from a customer with a question and you assign that letter to yourself / or write the letter yourself.

2. You write a reply/new message and press send.

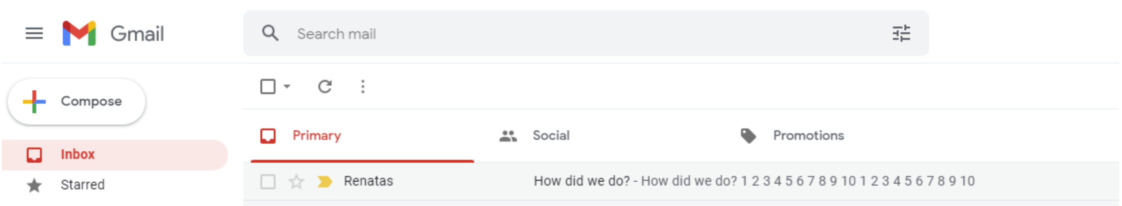


3. After this action, you press the Archive button and at the moment when the letter is archived , the system sends a separate assessment letter to the client.

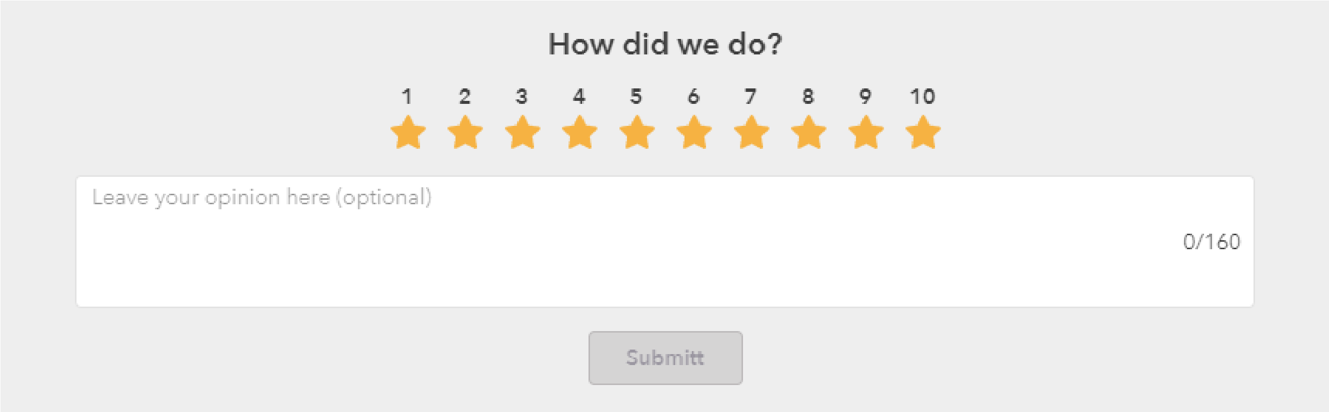
Very important: The assessment is sent only when the letter is archived (by pressing the selected button).

Very important: For one unique sender (IN) or recipient (OUT) - the NPS rating is sent only once per day.

4.The customer receives an NPS assessment letter in his mailbox with the contents of your table set in the settings:

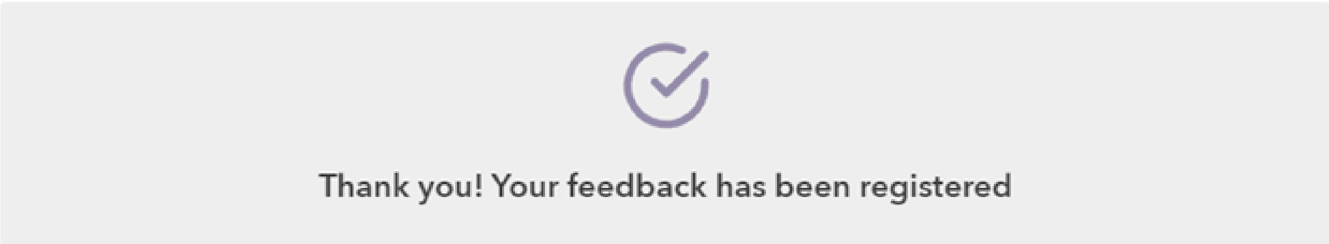


When opening the letter, client will see the following table:



In this table, it is possible to mark the rating or write a comment / note to the assessment (a comment is not required).

By clicking on the appropriate rating (by marking the desired number of stars) and pressing the submitt button , we will receive a confirmation message about the recorded assessment.



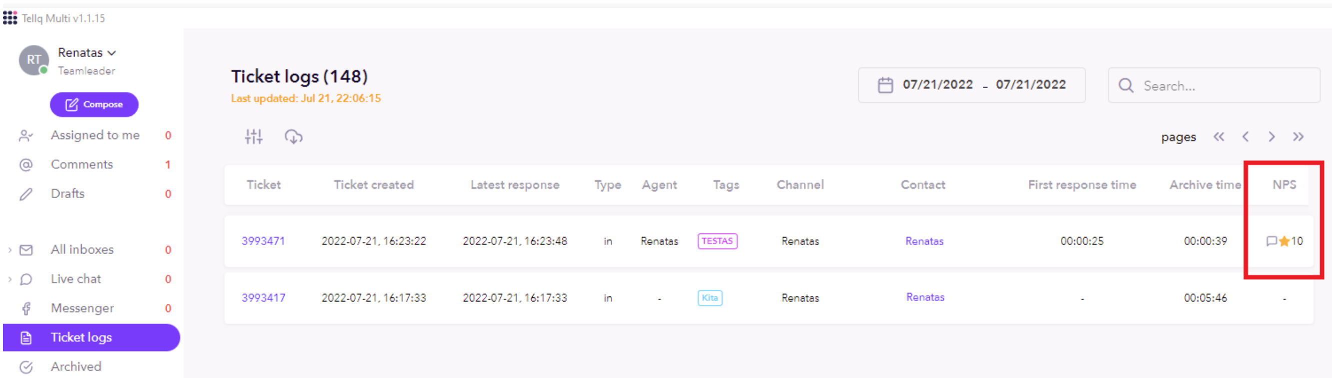
If such a message popped up , the rating was credited.

If a comment has been left, you'll see it in the Tellq app next to the rating score.

RESULTS OF THE NPS TICKETS EVALUATION

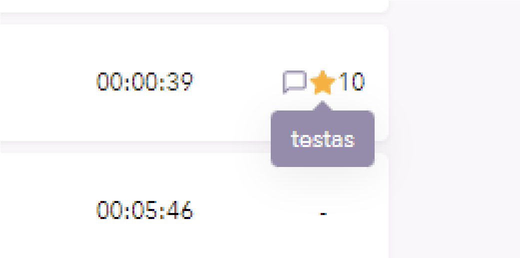
You can find the results of the evaluation in the Ticket logs section or by opening the evaluated letter:

Ticket logs section:

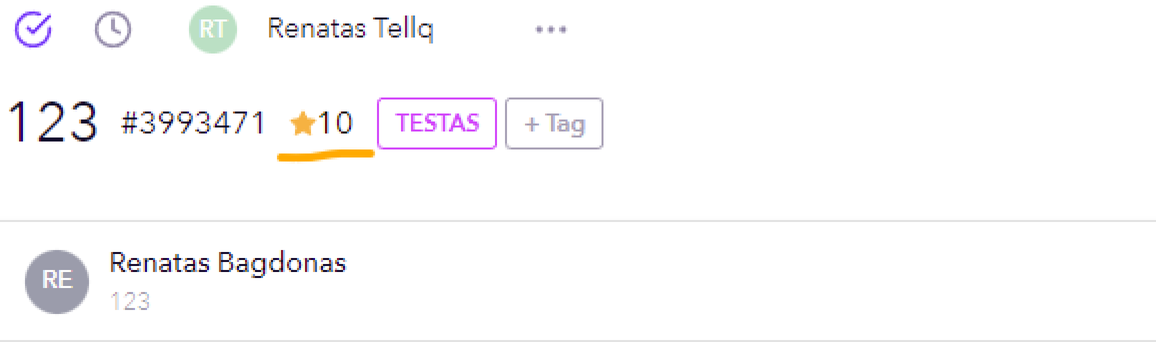


In this section, you can identify the evaluated messages by the value (result) of the Last Column (NPS). If there is an assessment score with an asterisk symbol in the NPS section - this letter was evaluated by the client.

If you see a bubble symbol next to the assessment, a comment was left next to the assessment.
You can read the comment by hovering over the bubble:



Appreciated letter:

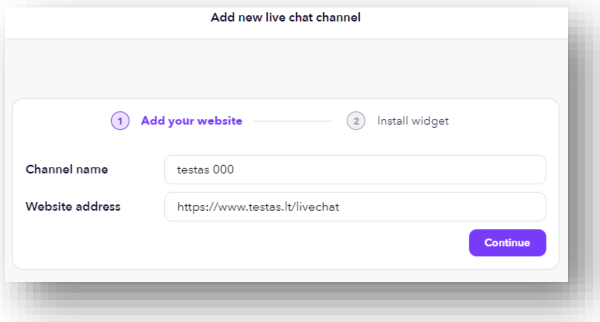


When you open the evaluated message, you can also see the assessment next to the message ID.

The rating will be with an asterisk symbol.

LIVE CHAT CHANNELS

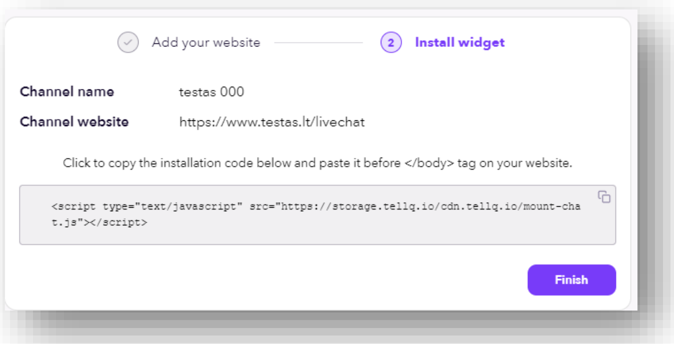
In order to create your Live Chat channel – you need to fill in this table by clicking on



Channel name – Enter the name of your Live chat channel (can be whatever you want).

Website address: Enter the exact location of the page where the Live chat widget badge will be located (usually this is the address of the original page). Important – the address should not be Http://

After saving the necessary information – click 



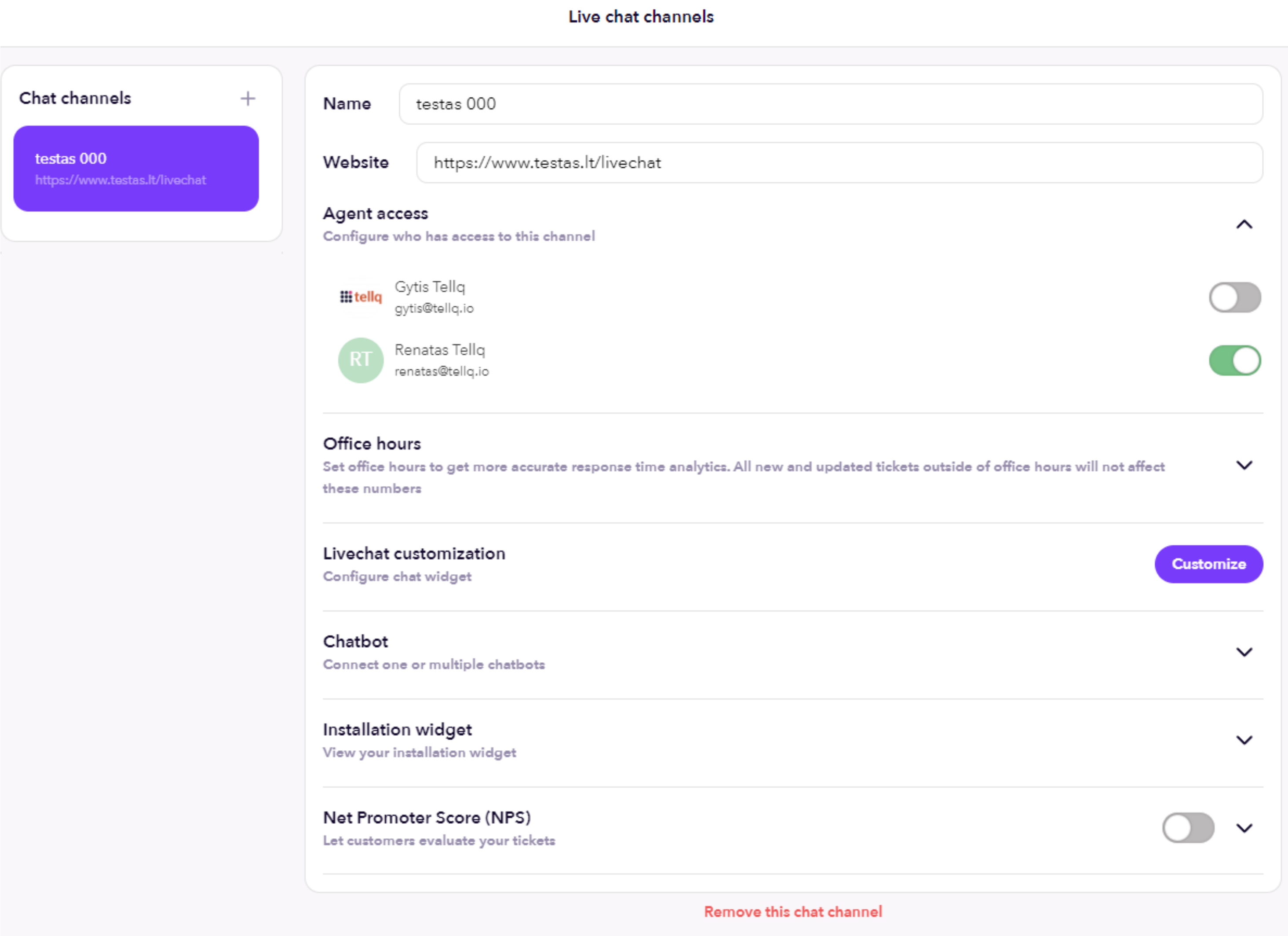
If you saved everything correctly - a table will appear confirming that the channel has been created.

Copy the specified code and forward it to the administrator of your page to load it to the specified location:

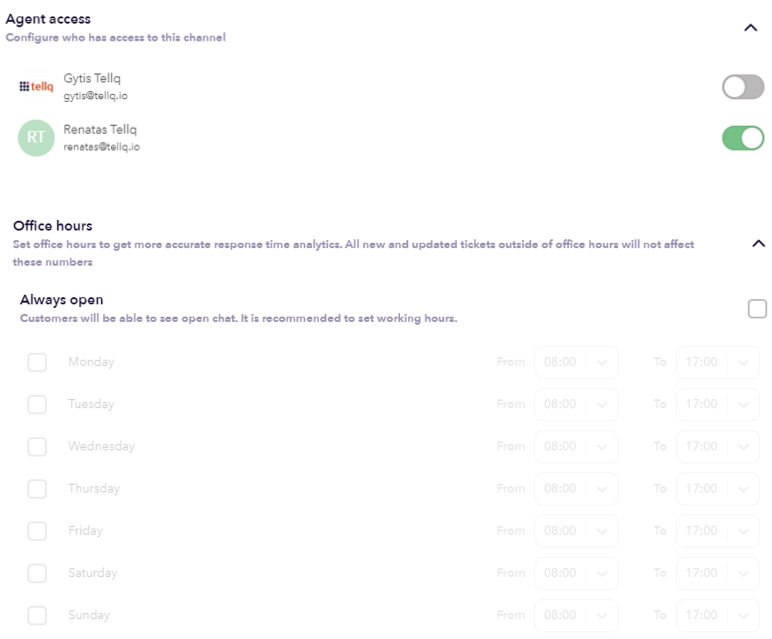
Click to copy the installation code below and paste it before </body> tag on your website.

Press 

to complete the creation.



After the channel has been successfully added – set the necessary settings for live chat to work properly.



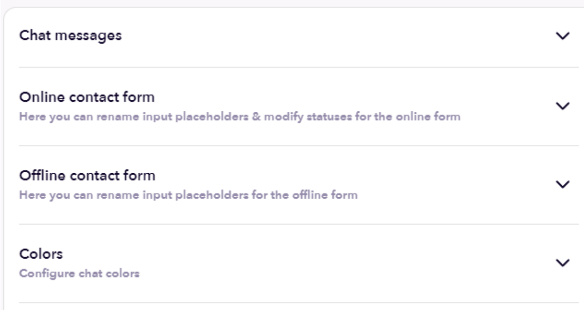
In this place, let's turn on live chat for selected Tellq agents. The agent must have a Live chat license, otherwise he will not be on this list.

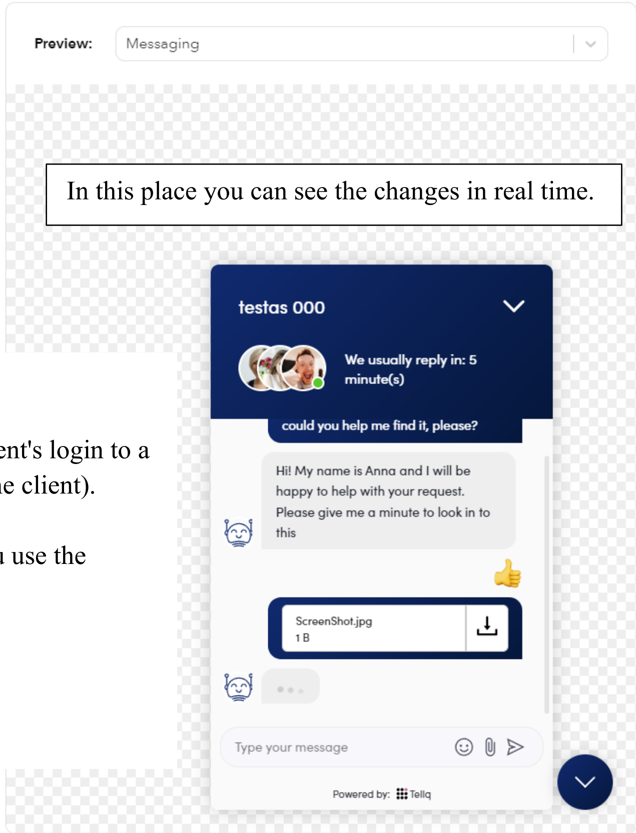
Office hours – In this section, you can determine whether your Live chat channel will be available only during the set time period or will be available all the time.

If you want to be available all the time – put a checkmark on the

If you want to work according to the set time – select the days and select the time intervals in the specified time menu.

In this selection (by pressing Customize) – you will open the main menu for setting up a Live chat, which will look like this:



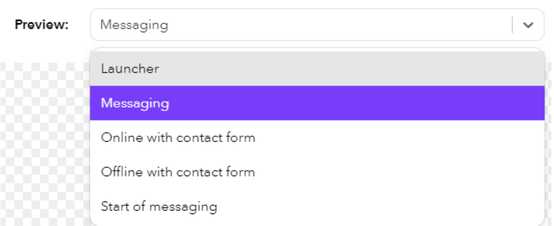


Chat messages – Live chat main table settings.

Online contact form – Table of settings for the client's login to a „live chat“ chat (the necessary information about the client).

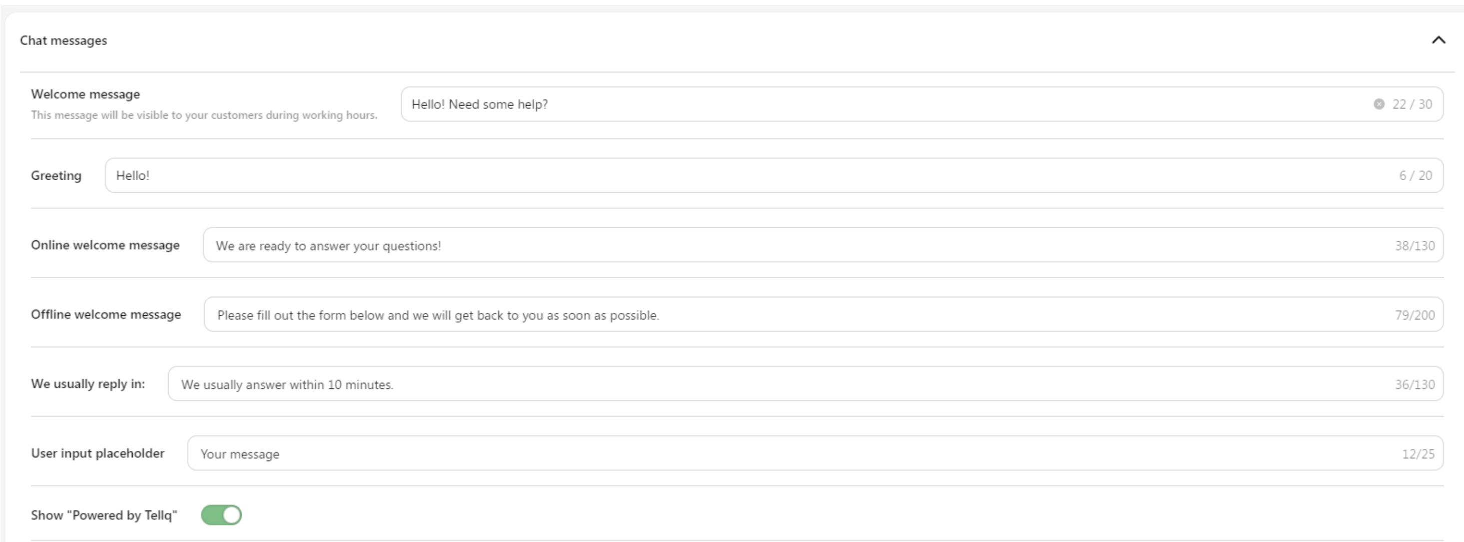
Offline contact form – Offline table settings if you use the working time settings.

Color – Set the colors of the Live chat table.

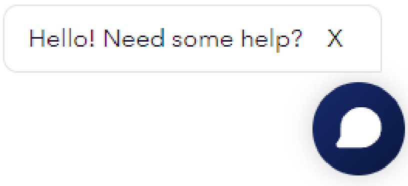


In the preview table, you can choose which menu changes you want to see in the Live example.

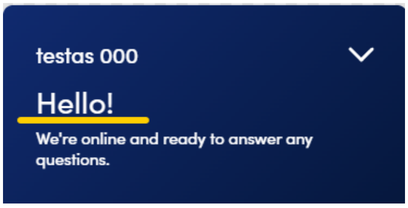
When we unfold the Chat messages section, we will see the following choices:



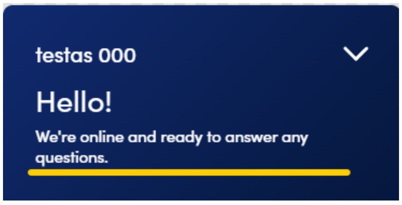
Welcome message – In this place you will be able to set the chat widget for the text of the bubble. A bubble is needed by customers to notice the Chat widget icon on the page faster:



Greeting – In this place you will be able to set a greeting, which will be visible in the following place in the Live chat widget:

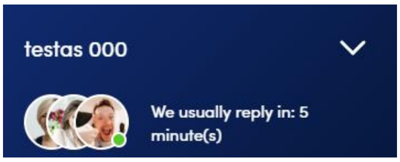


Online welcome message – text in the online form that you will see in the following location of the Live chat widget:

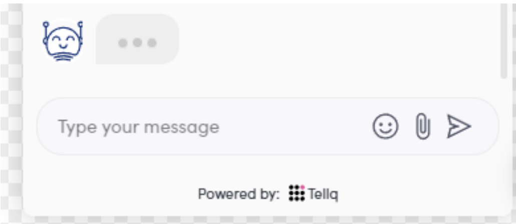


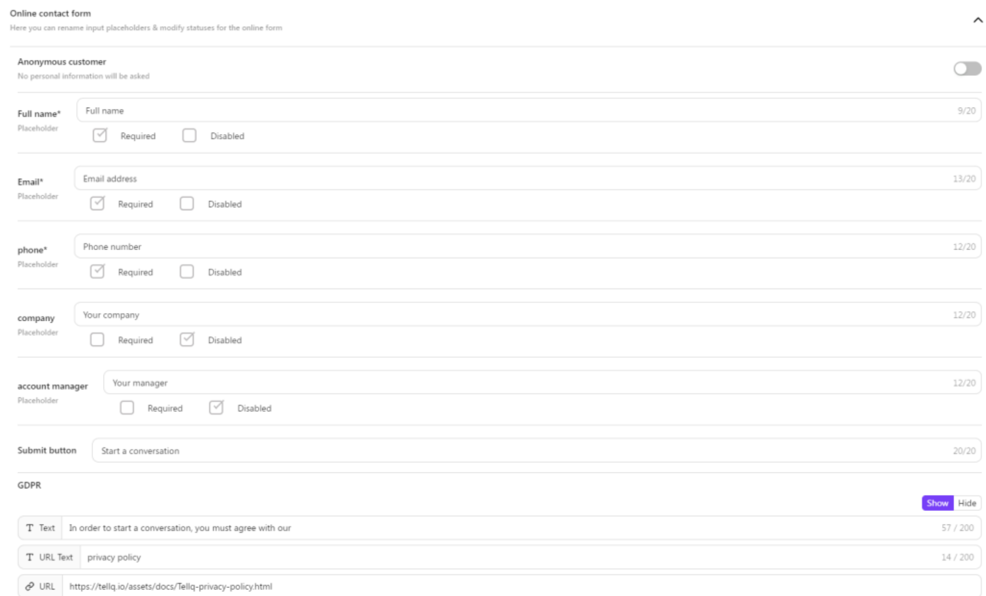
Offline welcome message – Offline message (non-working time). The message will appear along with the offline form table, which the customer will have to fill out.

We usually reply in – You can write the average of the time it takes to respond to requests.



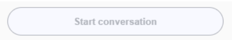
User input placeholder – Message text box inscription:





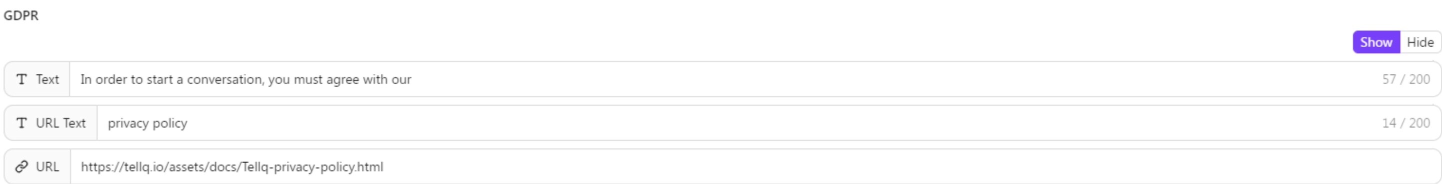
In the following table, you can choose what the client should fill out before starting a conversation with a Tellq agent. If the line is necessary - put a checkmark on **the "Required"** - then the system will not allow the client not to fill in this line.

If you want to disable the line - put a checkmark on **"Disabled"**

Submit button - 

by pressing this button - you will start a chat with the Tellq agent (table data validation)**.**

If you want to insert **a GDPR** link with confirmation into your LiveChat table – fill in the GDPR table settings:



In the first line

, enter your GDPR text up to the word under which you will place a link to your page.

In the second line

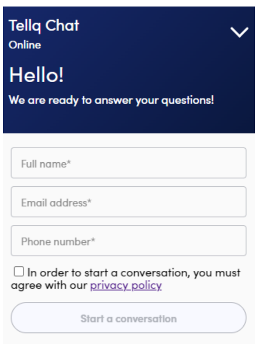
, write the word under which you will place the GDPR link.

In the third line

, enter the page link to your GDPR requirements. You need to write a link with the https://

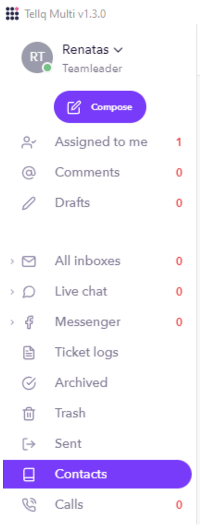
With the help of these buttons you will be able to enable / disable gdpr requirement confirmation.

After enabling this setting – the client will see the following image in your Chat widget (if the client does not put a checkmark next to the GDPR rules >> Start a conversation button will be inactive and the client will not be able to start communicating with the Tellq app agent):

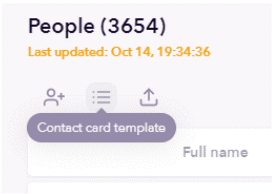


ADD ADDITIONAL LINES TO A LIVE CHAT ONLINE CLIENT FORM

In the main window of the Tellq program, press "Contacts"



In the contacts menu that opens – select the "Contact card template" selection:



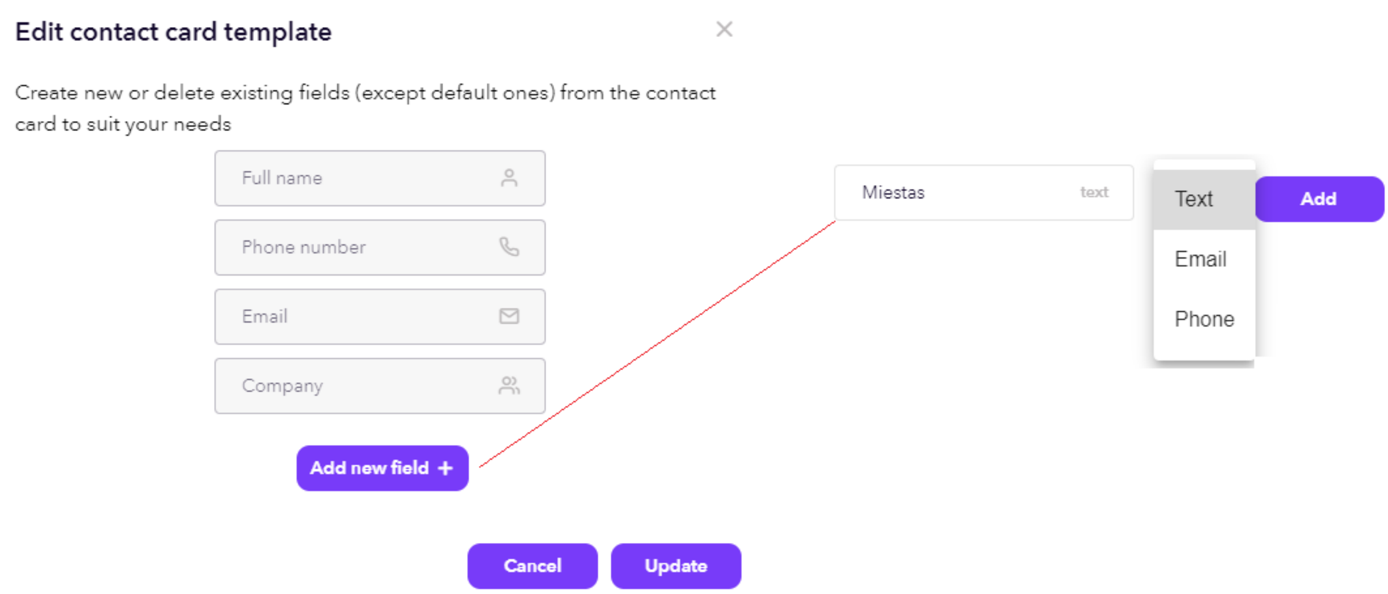
The table should open, where you can add the desired columns:

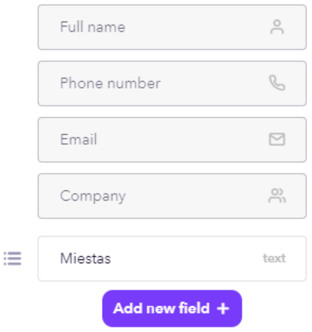
1. Press Add new field +

2. In the line that opens, enter the desired value and select the type. There are three types—choose according to the nature of the text you're recording.

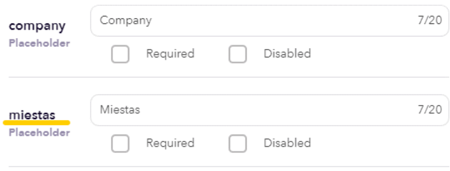
3. Click Add

4. After adding, you will see the new column you added:





5. Press Update and check if the column you created has appeared in the Live Chat customize menu:



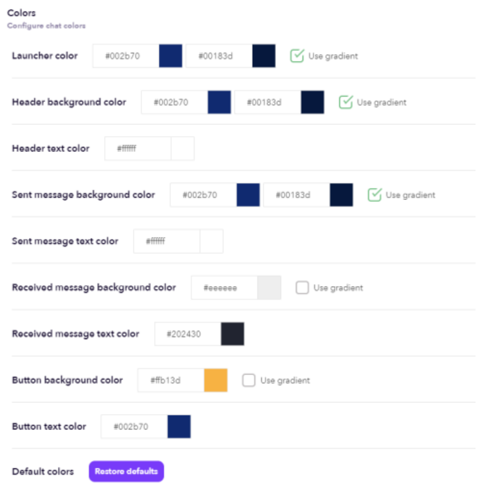
Returning to the Live Chat settings – let's take a look at **the offline contact** form settings:

The table is active only when there are set working hours. It is activated during non working.

Send to – In this line you can save your own, or select from the list - the email address to which the customer requests will go during the non-working hours.

Full name / email / message – there are mandatory completed fields. They will have to be filled out by the customer - in the table of the offline form.

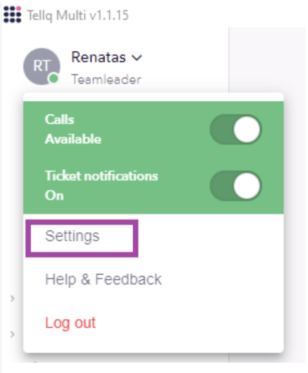
Colors section – You will be able to set a pop-up, chat widget and other color list. The expanded menu will look like this:



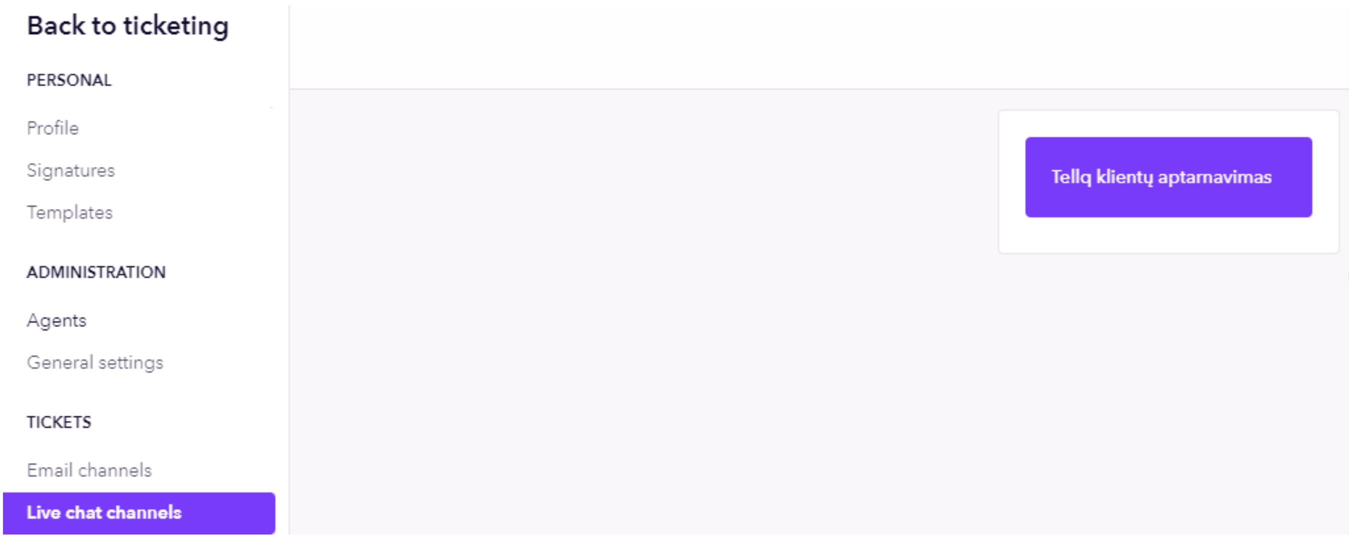
To see the color scheme , you can use the preview mode in the corner. Its operation is described above.

NPS LIVECHAT ASSESSMENT SETTINGS

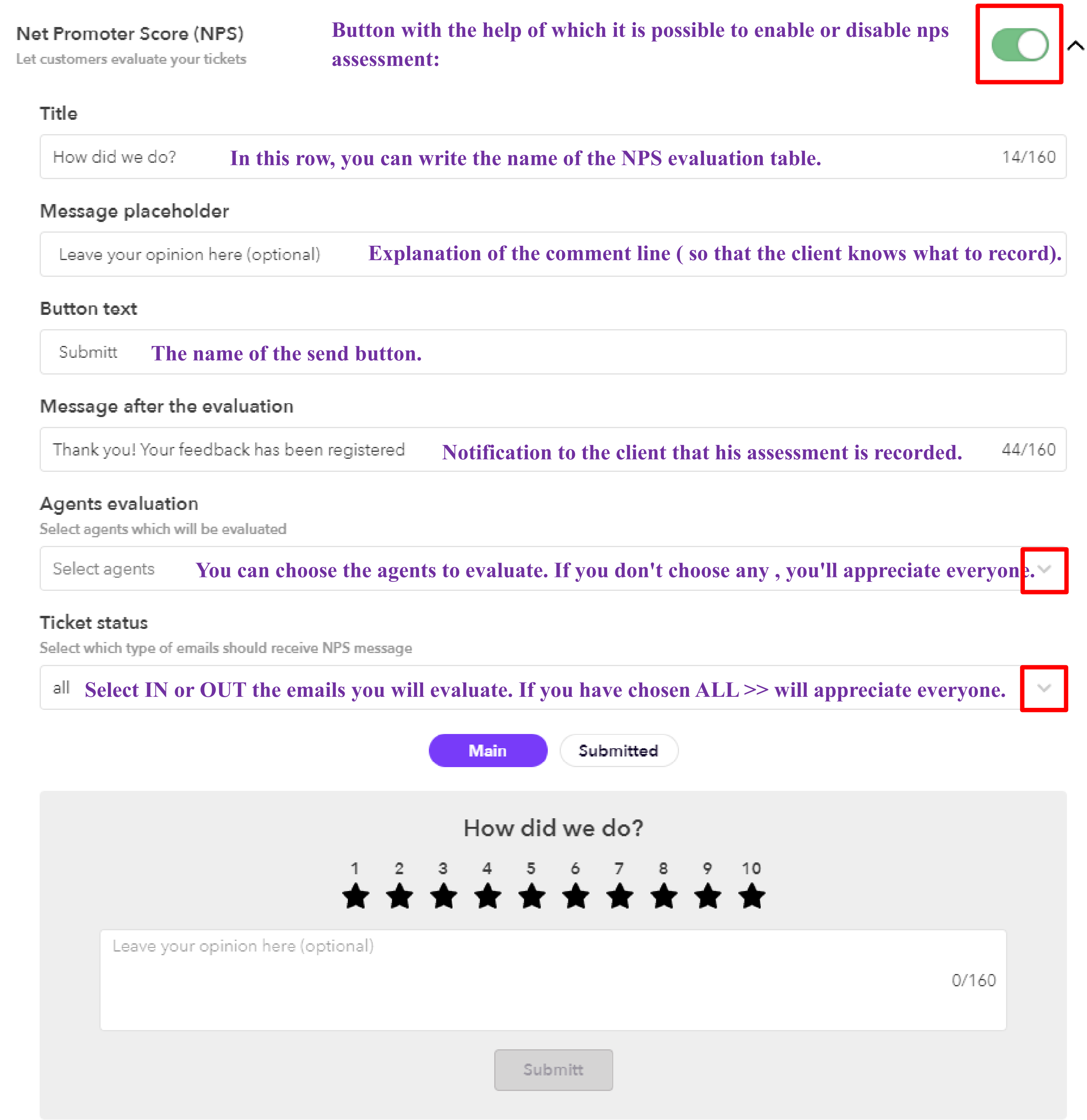
Click on your name – on the left, in the upper corner of the window and select **settings.**



In the settings window that opens, select **Live Chat chanels** and select the live chat channel for which you want to enable NPS assessment:

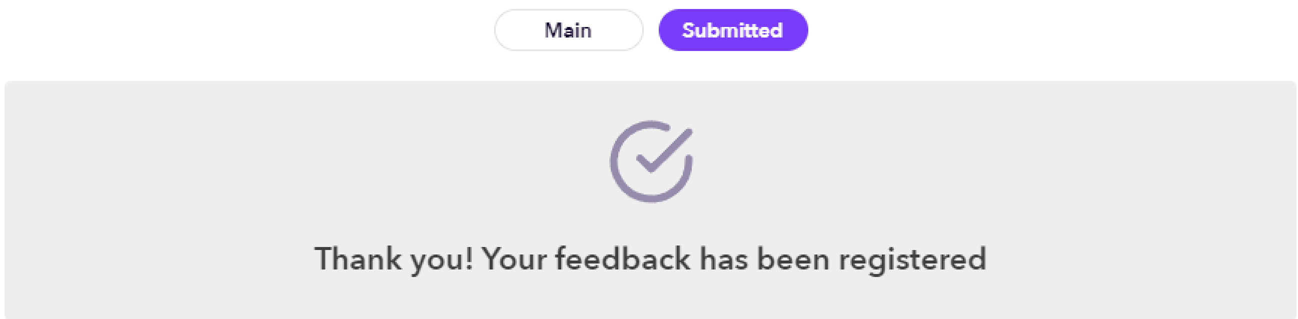


At the bottom of the window (in the live chat channel settings) you will see the NPS settings. **Expand them by pressing the highlighted arrow symbol**:



In this table, you can see in real time what your assessment table will look like. When making changes in the described settings, the values in the table also change.

When you press **Main** , you'll see what the image of the scoring table will look like at the beginning (control image).
After clicking **Submitted,** you will see how the table will look after the customer's assessment (control image).



THE COURSE OF THE NPS LIVE CHAT ASSESSMENT

After setting the NPS settings – enable the NPS function at the top of the window **(the first button described).**

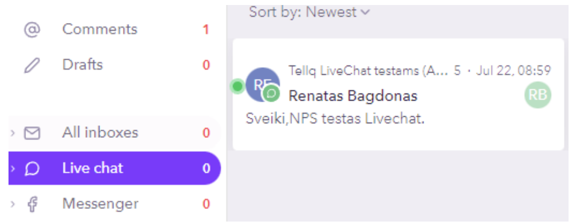
After switching on, you can test the performance of the function.

According to the example of the instruction that we provided, all agents in the mailbox will be evaluated (we did not select anything in the Agents evaluation table, so they will evaluate all agents assigned to the selected mailbox).

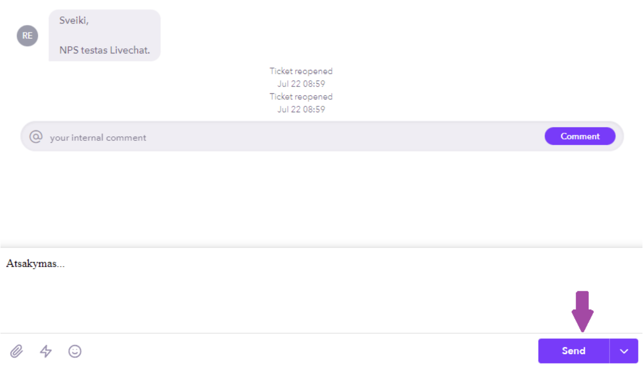
We have selected ALL in the Ticket status line, so IN and OUT letters will also be evaluated.

How is the assessment itself going?

1. You receive a Live chat email from the client with a question and you assign that letter to yourself / or write a response to an older comunication.



2. You write the answer and press send.

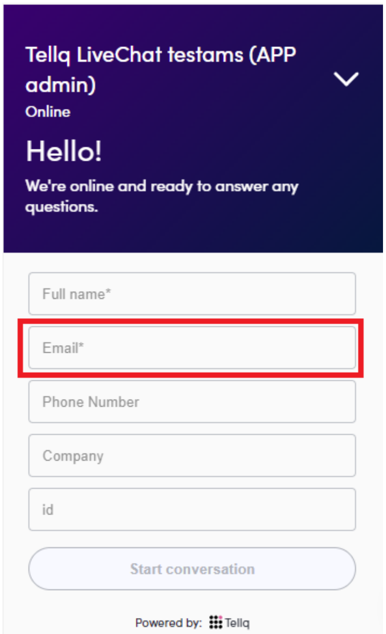


3. After this action, you press the Archive button and at the moment when the letter is archived , the system sends a separate assessment letter to the client.

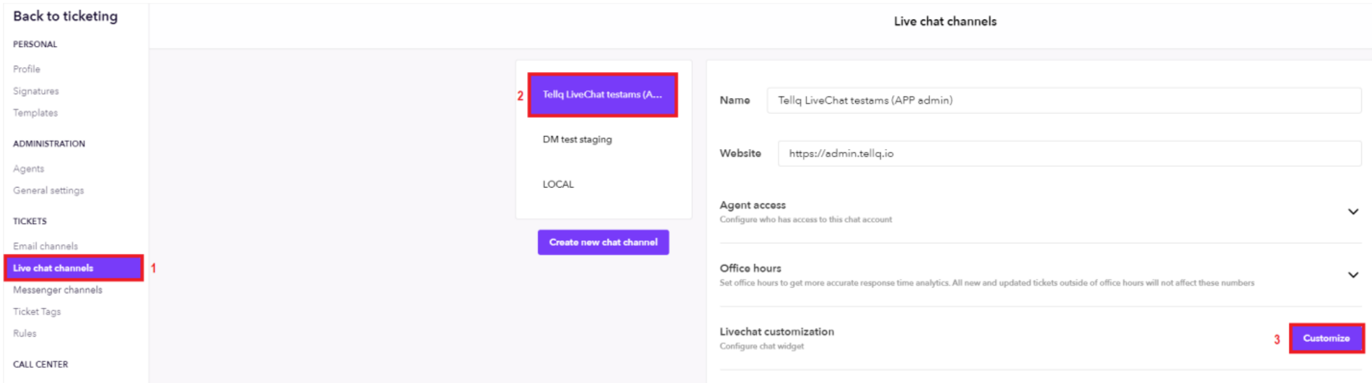
Very important: The assessment is sent only when the letter is archived (by pressing the selected button).

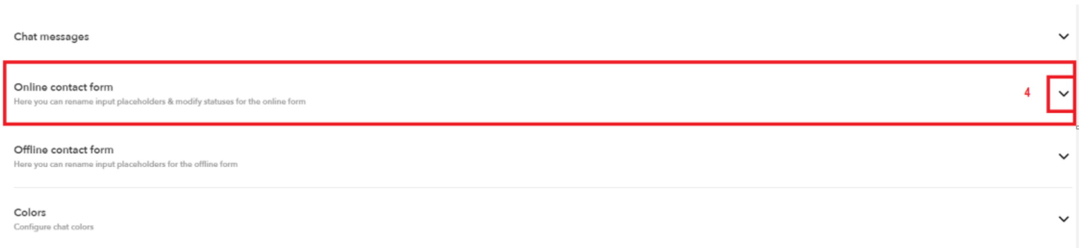
Very important: the NPS assessment is sent only once per day - to a unique email address.

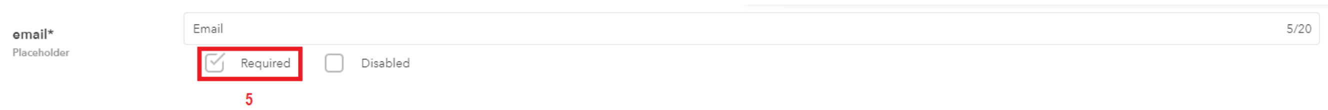
Very important: In order for the NPS assessment to be sent - the client must have entered his e-mail address in the Live chat data table (Otherwise the assessment will not be sent):



<u>You can set up a livechat contact form in the following place:</u>

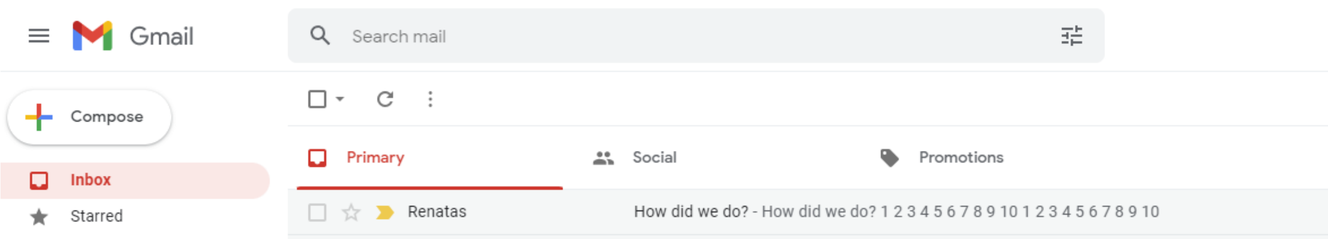




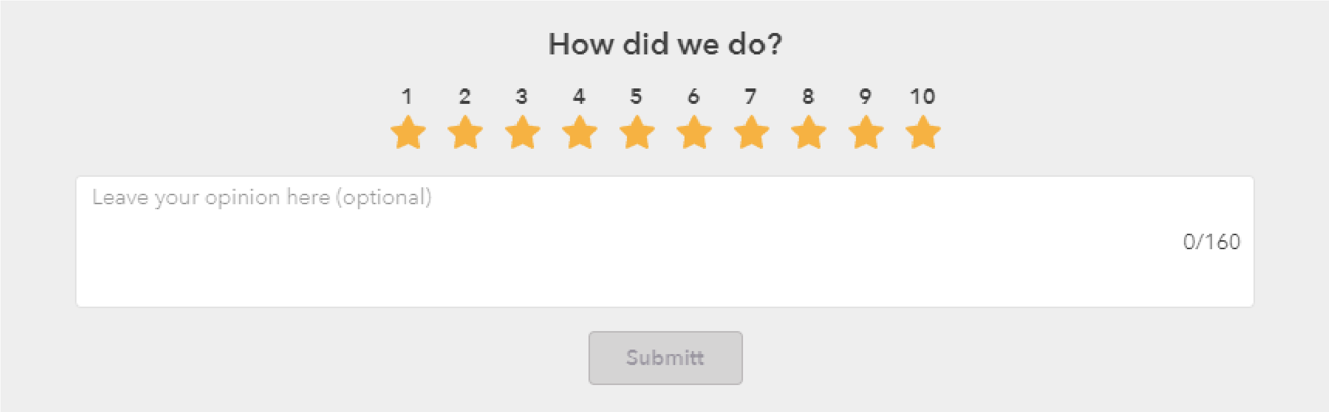


The email field must be marked as Required so that the customer must enter the e-mail.

4.The customer receives an NPS assessment letter in his mailbox with the contents of your table set in the settings:

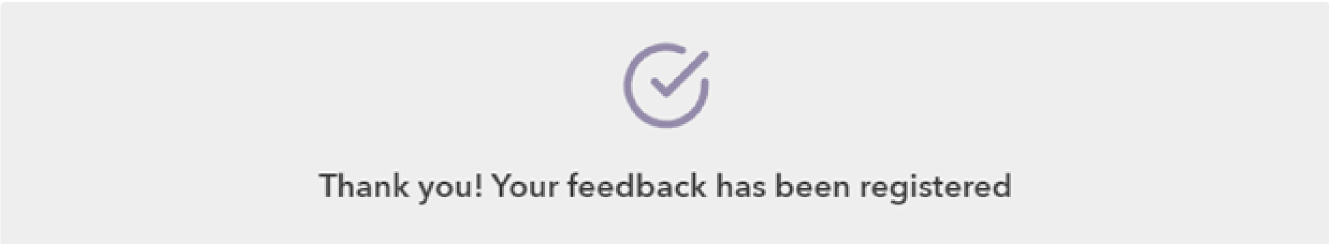


When opening the letter, the client will see the following table:



In this table, it is possible to mark the rating or write a comment / note to the assessment (a comment is not required).

By clicking on the appropriate rating (by marking the desired number of stars) and pressing the submitt button , we will receive a confirmation message about the recorded assessment.



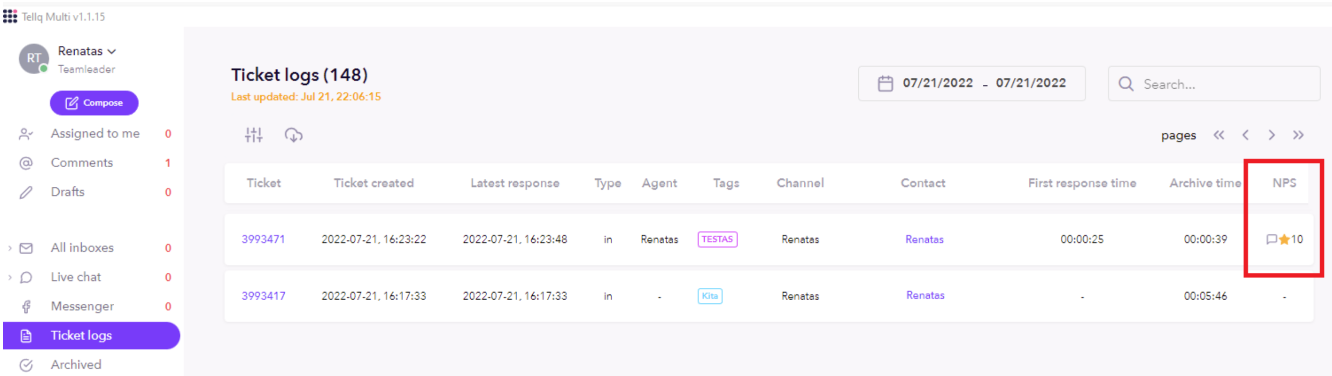
If such a message popped up , the rating was credited.

If a comment has been left, you'll see it in the Tellq app next to the rating score.

RENDERING OF THE RESULTS OF THE NPS LIVECHAT ASSESSMENT

You can find the results of the evaluation in the Ticket logs section or by opening the evaluated letter:

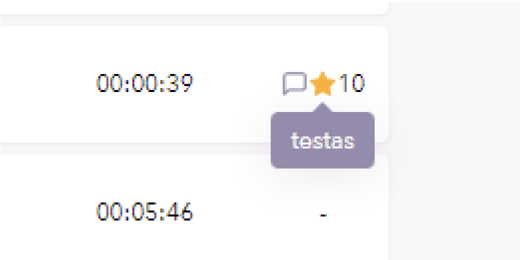
Ticket logs section:



In this section, you can identify the evaluated messages by the value (result) of the Last Column (NPS). If there is an assessment score with an asterisk symbol in the NPS section - this letter was evaluated by the client.

If you see a bubble symbol next to the assessment, a comment was left next to the assessment.

You can read the comment by hovering over the bubble:



Appreciated letter:

When you open an evaluated Live chat message, you can also see the assessment next to the message ID.

The rating will be with an asterisk symbol.

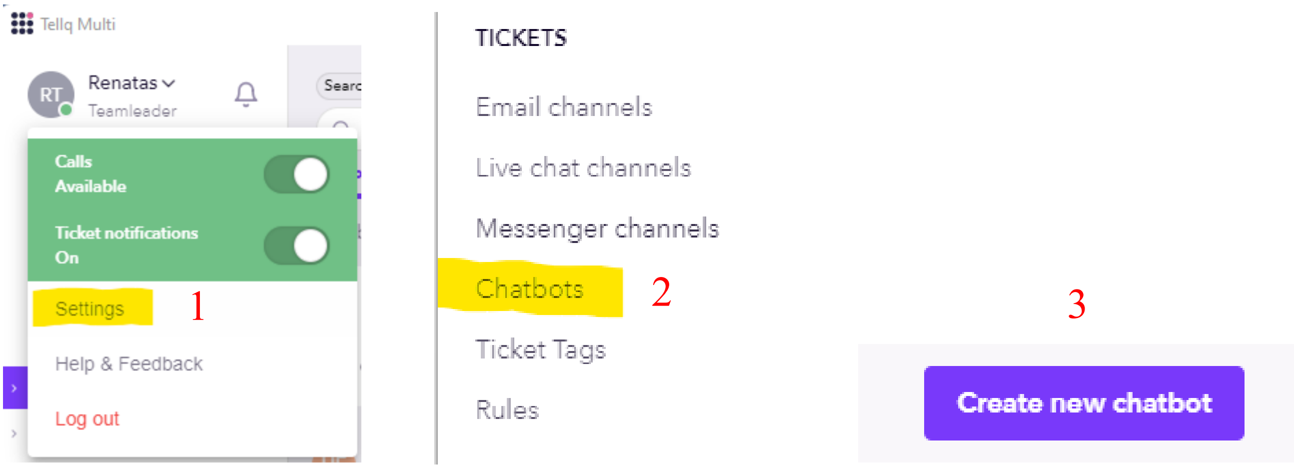
CHATBOTS

Click on your "Teamleader" name - in the upper left corner of the window.

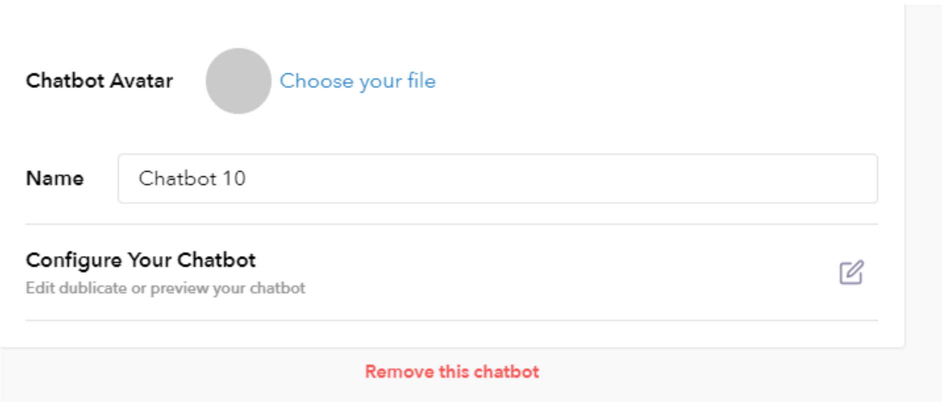
In the window that opens, click - "Settings" (1)

In the opened menu, click on "Tickets" - "Chatbots" (2)

Press - "Create new chatbot" (3)



If you did everything correctly, the initial ChatBot settings window should have appeared in the system:



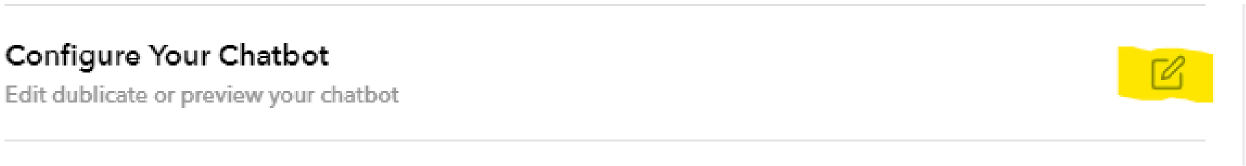
Chatbot Avatar - You can add a chatbot avatar image.

Name – You can change the name of your Chatbot.

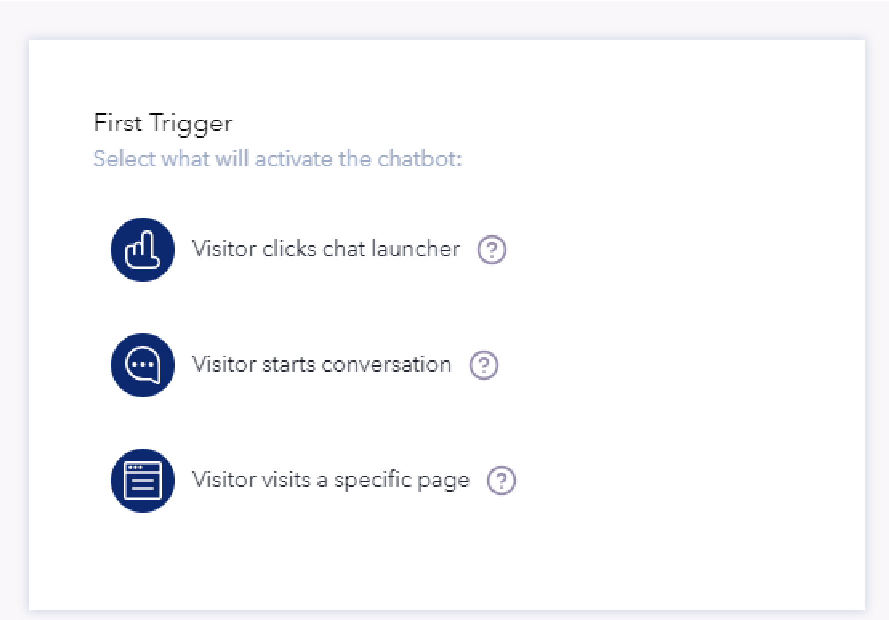
Configure your Chatbot - You can start building your chatbot logic tree.

Remove this chatbot - You can delete the created chatbot.

To start creating your "Chatbot" logical tree - press the icon marked in yellow:



In the window that opens, you should choose one of the existing "Triggers":



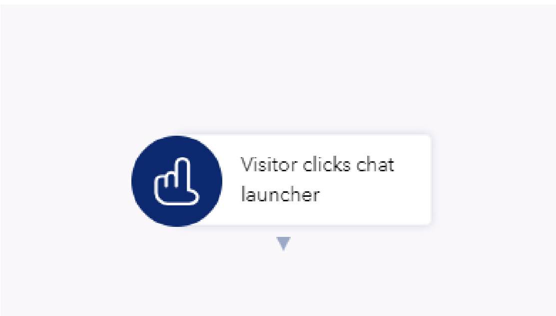
When creating a "Chatbot" you should always choose one "Trigger" that will determine when your created "ChatBot" should start.

Visitor click chat launcher - "ChatBot" will start as soon as the client clicks on the "Chat" icon on your website.

Visitor starts conversation - "ChatBot" will turn on as soon as the client initiates the beginning of the conversation - writes the first message.

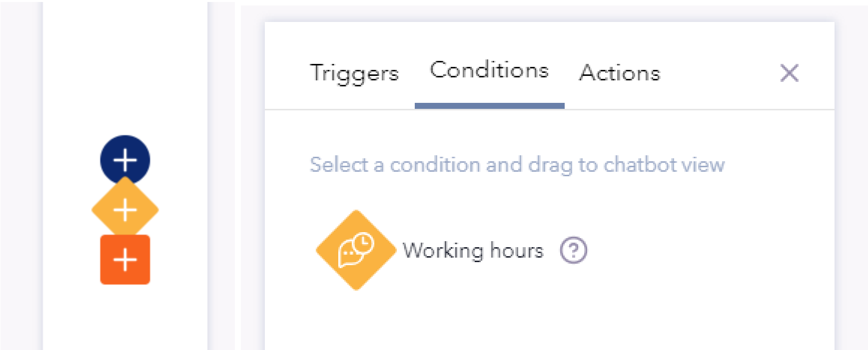
Visitor visits a specific page - "ChatBot" will activate as soon as the client enters a certain place on the page (set by you).

After selecting the desired trigger, it should open in a new window and look like this:



"CONDITIONS"

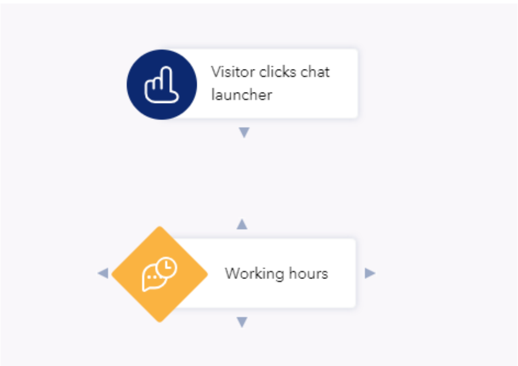
In the menu on the right side, select the orange icon "Conditions"



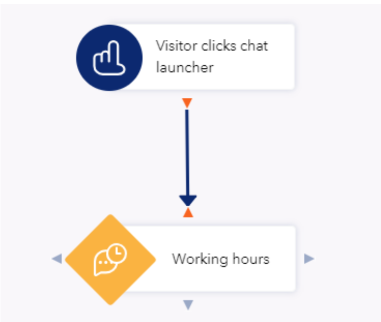
To add the existing "Condition" to the logical tree, click with the left mouse button on "Working hours" and drag it to the already added "Trigger".

Release mouse button

A correctly loaded Condition will look like this:



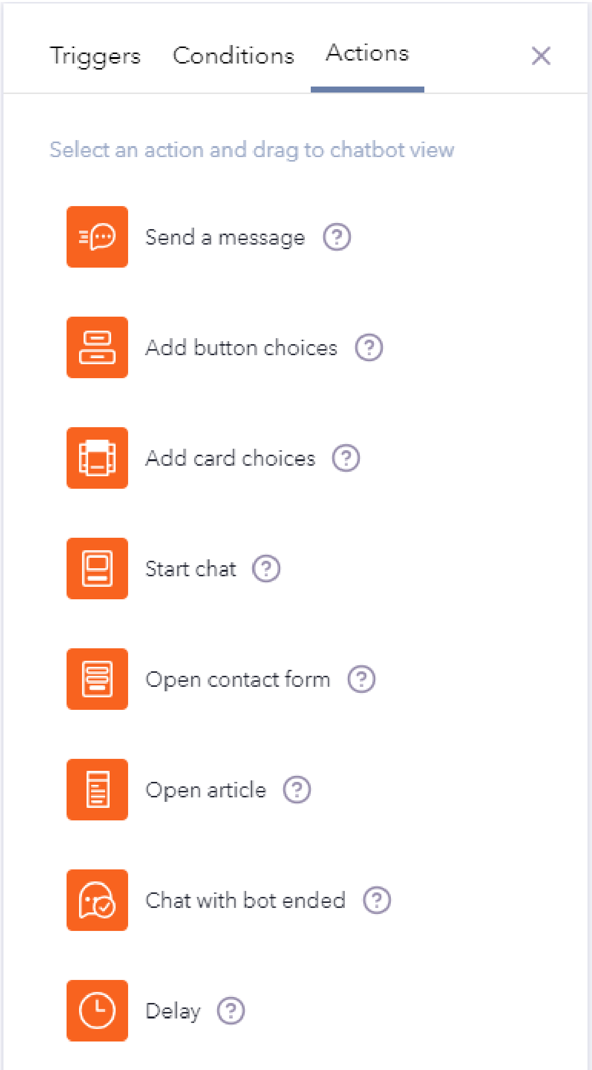
In order to connect these two points, press the arrow at the bottom of "Trigger" with the left mouse button and drag it towards the arrow at the top of "Condition". After connecting, the result should look like this:



"ACTIONS"

To add additional Actions to the ChatBot logic tree, click the red square on the right side of the settings.

In the table that opens, you will see all the currently available "Conditions" (you can see all the explanations by hovering your mouse over the question mark symbol, next to the corresponding "Action"):



SEND A MESSAGE - A message set by you will be sent to the customer.

ADD BUTTON CHOICES - You will be able to add additional choices in the form of buttons (the customer will be able to see and press them).

ADD CARD CHOICES - You will be able to add additional choices in the form of tables (the client will be able to see and click on them).

START CHAT - Live Chat with a responsible employee will start during business hours.

OPEN CONTACT FORM - A contact form will open in which the customer will have to enter his data.

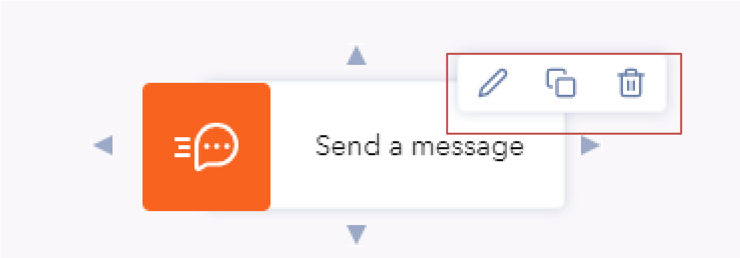
OPEN ARTICLE - You can link to a page or its location with an automatic or self-described "Article"

CHAT WITH BOT ENDED - A message is displayed that the chat with the "Chatbot" has ended. A new Conversation can be started.

DELAY - Delays the chatbot for a set period of time.

"ACTIONS" EDITING

To edit the desired "Action", place the mouse cursor on it and a mini selection window will open in the corner:



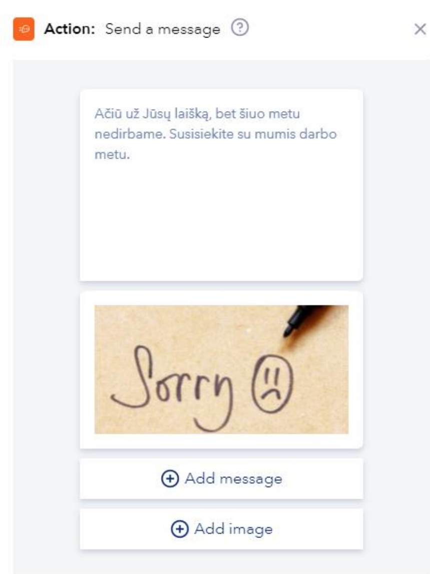
PENCIL SYMBOL - Pressing this symbol will take you to the Action setting itself. In this case, in the internal settings, you will be able to write a message that the client would receive.

BOXES SYMBOL - Clicking this symbol will allow you to copy the analog Action with all internal settings.

TRASH CAN SYMBOL - You will delete the selected "Action".

"ACTIONS" DESCRIPTIONS

"Send a message" is required to send an automatic message to the client with the selected image (if such a need exists). The settings window for this Action looks like this:



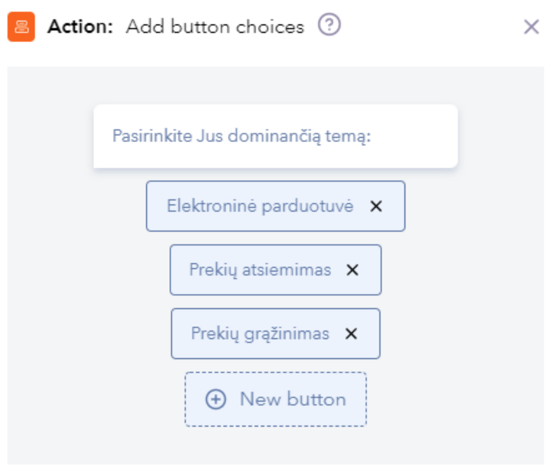
+ Add message – You can write your desired message text (as shown in the example).

+ Add image – You can upload the picture you want (as shown in the example).

Important: The number of messages and pictures can be more than 1.

"Add button choices" is required to add choice buttons. The client will see the buttons you have set, which will get different results when pressed.

The settings window for this Action looks like this:



White line - You can write your desired message text before the buttons appear (as shown in the example).

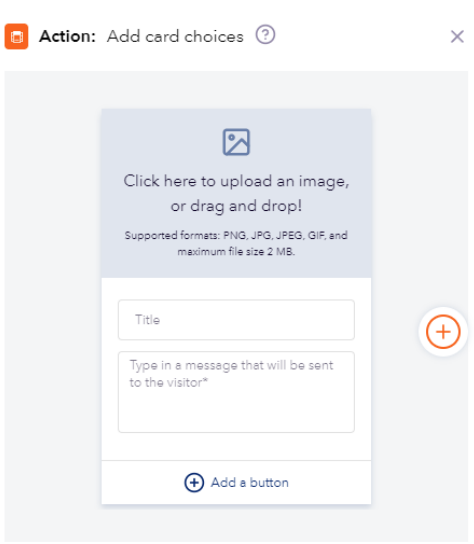
+ New button – You can create the button names you want (as shown in the example).

Important: The number of buttons can be more than 1.

Add card choices

"Add card choices" is required to add choice buttons. The client will see the buttons you have set, which will get different results when pressed.

The settings window for this Action looks like this:



Click here to upload an image, or drag and drop – You can upload the desired picture in the specified format up to 2mb.

Title – Write the name of the picture.

Type in a message – Write the name of the picture. Write the description of the uploaded picture (eg description of the specified product, etc.)

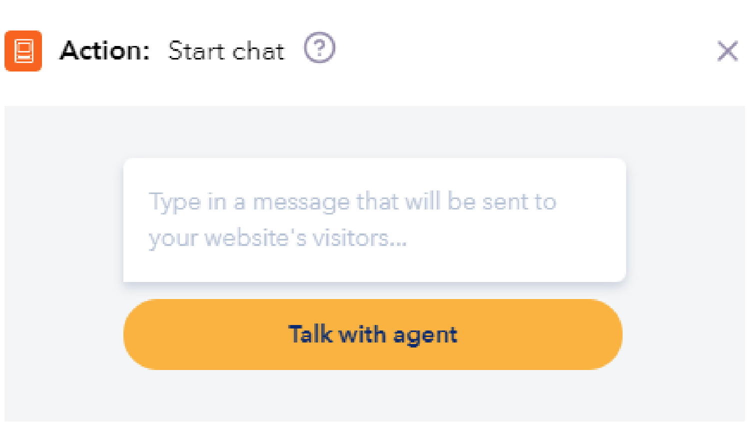
If you want to add more such cards - click +

Important: The number of cards can be more than 1.

Start chat

"Start chat" is required to direct the client to an online consultant - for further correspondence.

The settings window for this Action looks like this:

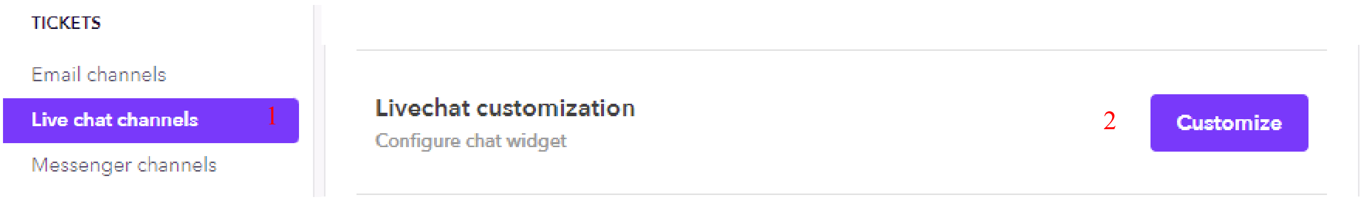


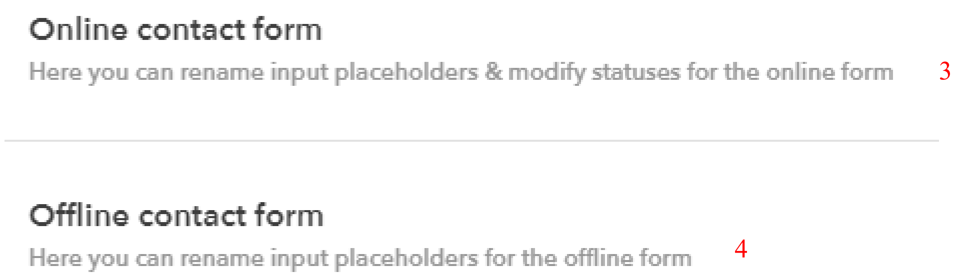
Type in a message enter the opening text for the client to know that when clicked

„**Talk with agent**“ button - will be connected to a live online consultant for further correspondence.

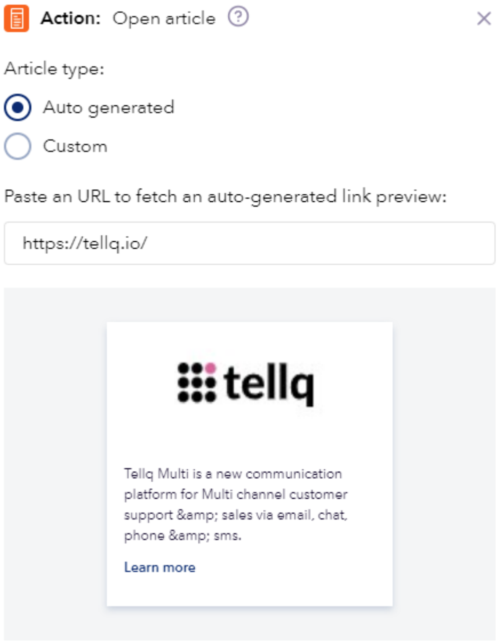
"Open contact form" is required in order to send the customer a table in which he should fill in the requested contact information.

The table for filling in contact information is taken from the LiveChat settings here:



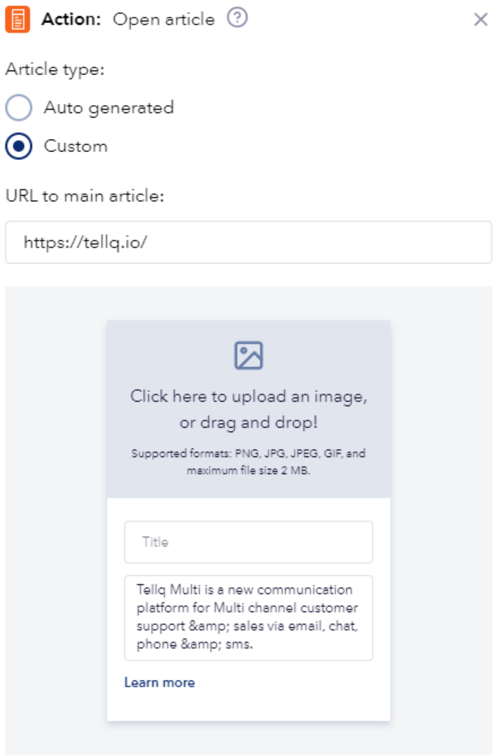


"Open article" is required to create a link with the Original or "Custom article" to the selected page or its location. The settings window for this Action looks like this:



Auto generated – After copying the link to the "Paste an url" section, a link to the page will be generated with an automatically selected description.

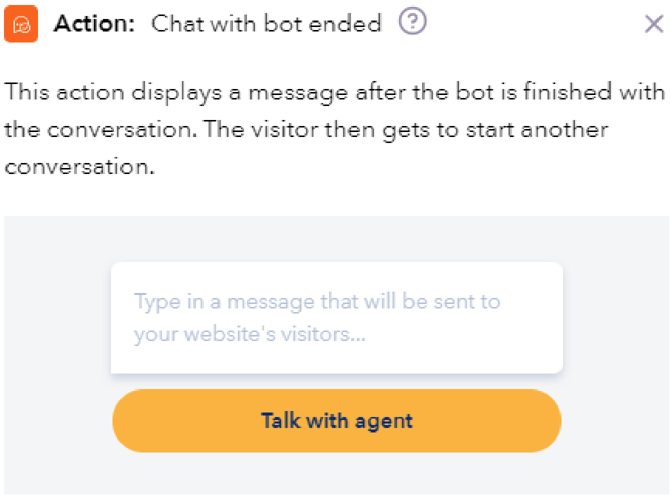
After clicking "Learn more", the customer will be redirected to this web page.



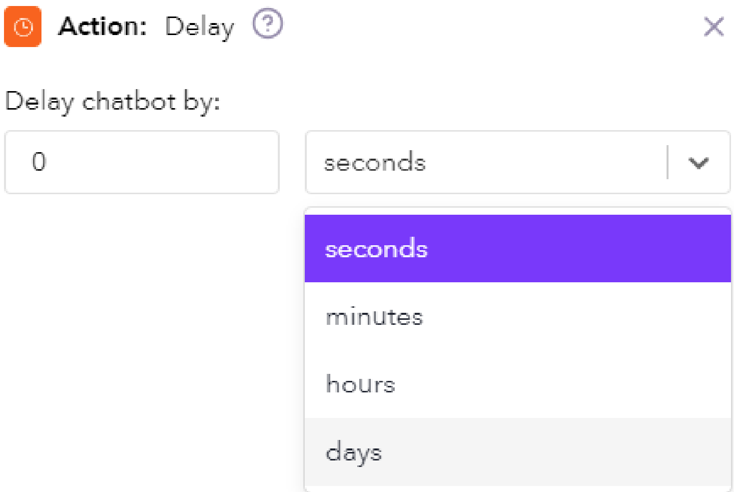
Custom – After copying the link to the "URL to main article" section - You will be able to describe the link yourself, add the desired image to the "title".

After clicking "Learn more", the customer will be directed to this link of yours.

"Chat with bot ended" - By selecting this "Action" the Chatbot will end its work (with a specific message created by you) and offer the customer to press a button to start communicating with an online agent.



"Delay" - With this option, you can delay the start time of the Chatbot for a selected period of time.



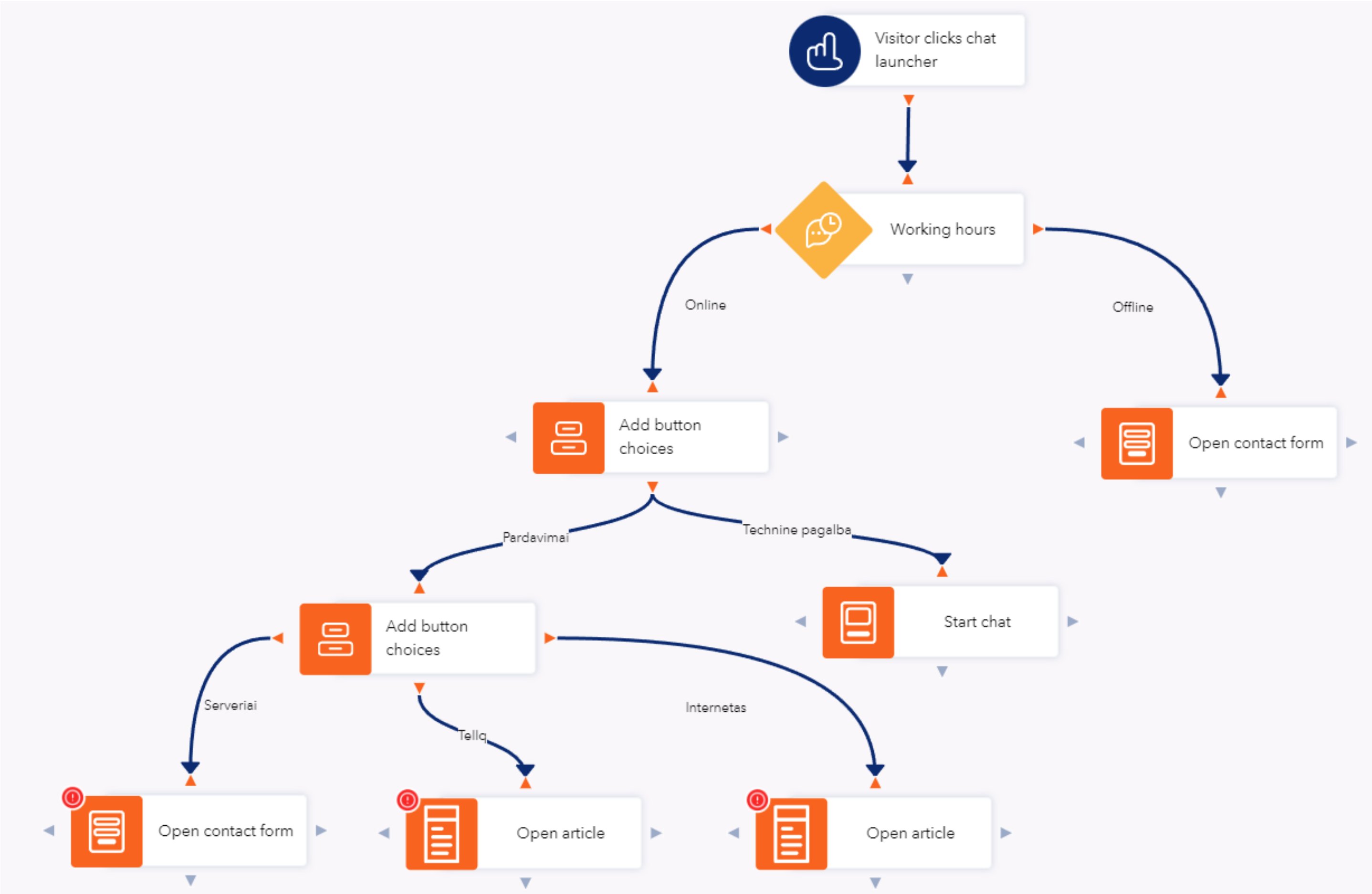
Delay chatbot by – Set the time period after which your created Chatbot will be launched.

This feature is useful if you don't want to launch the chatbot for the customer first.

IMPORTANT – If Chatbot is enabled, it will always start as LiveChat. This is the "system default" setting.

DESCRIPTION OF SAMPLE CHATBOT LOGIC TREE

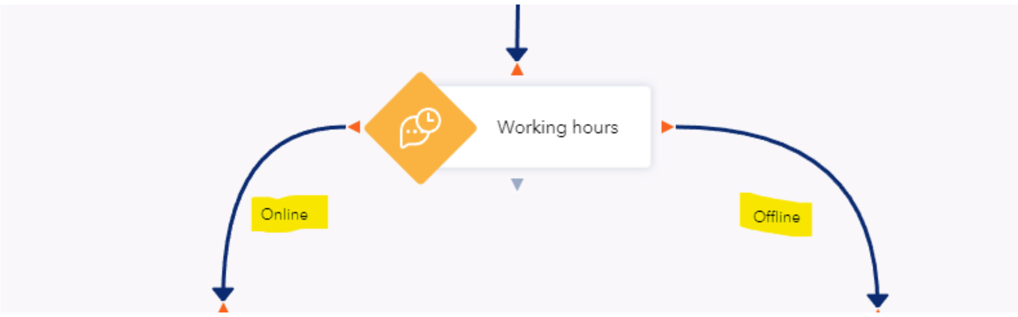
In this section, we will discuss an example from a ready-made, short, elementary - "Chatbot" logic tree.



According to the prepared "ChatBot" logic tree, we see the following sequence of actions:

The client clicks on the "Chat" icon on your website.

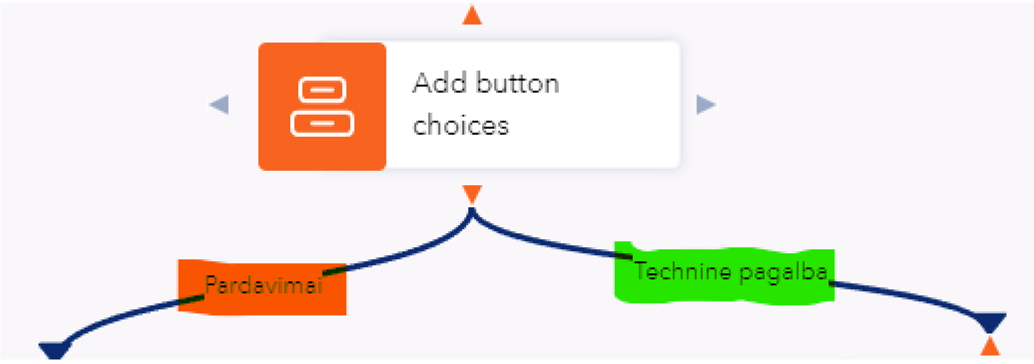
"ChatBot" is activated >> checking whether there are currently working or non-working hours.



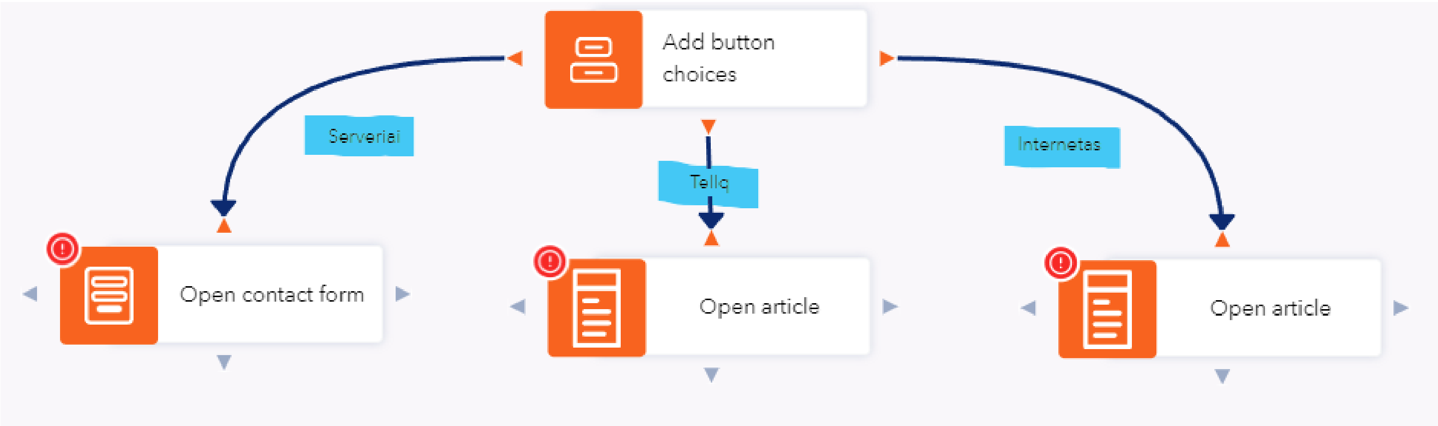
If there are currently working hours (online) - button selections are shown to the customer

[PARDAVIMAI]

[TECHNINĖ PAGALBA]



After selecting **[PARDAVIMAI]**, three more options are displayed:

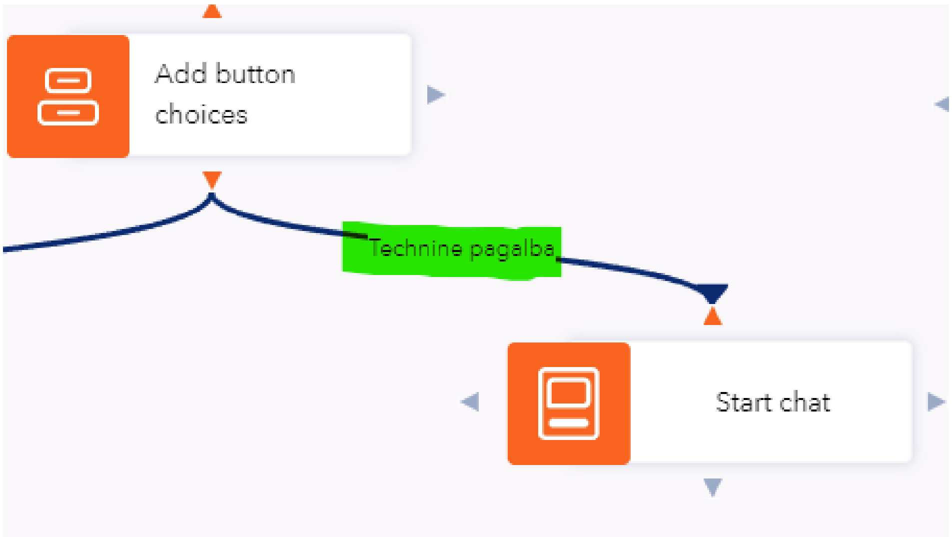


[SERVERIAI] - Selecting this option will fill out the contact form.

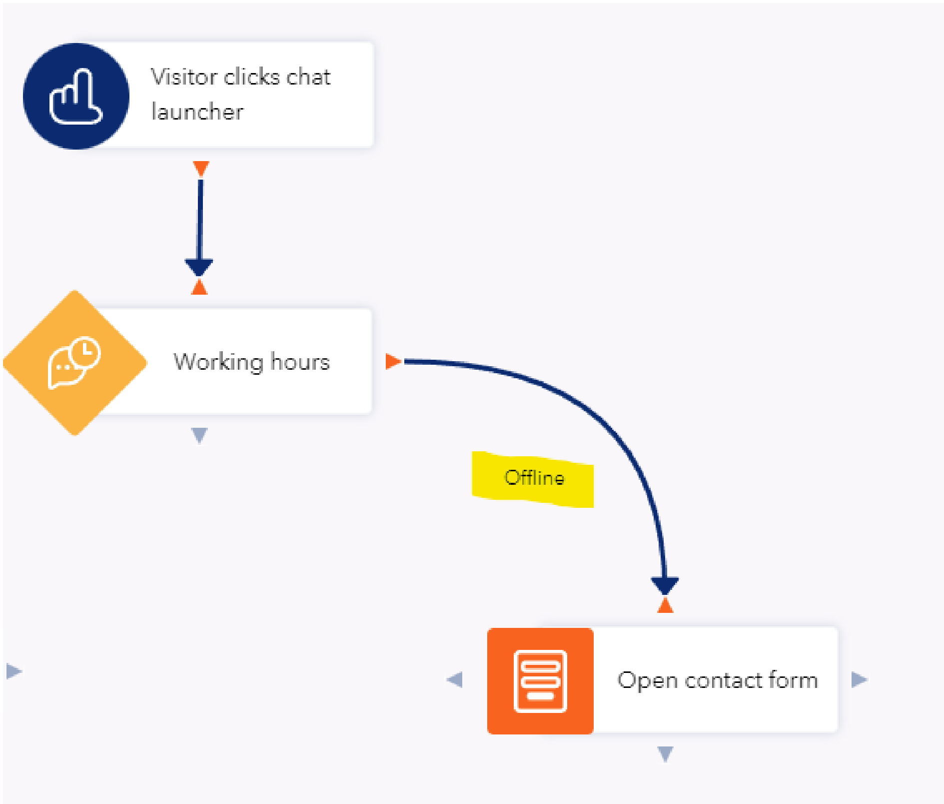
[TELLQ] – Selecting this option will show the customer an informational message about a specific page (image, title, description).

[INTERNETAS] - Selecting this option will show the customer an informational message about a specific page (image, title, description).

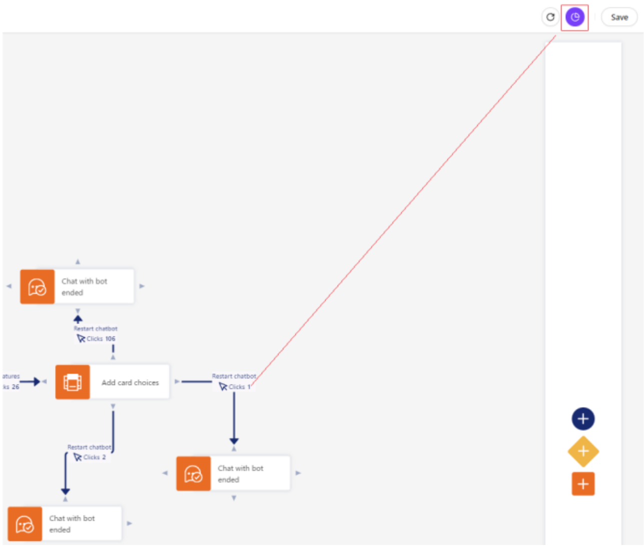
By selecting **[TECHNINĖ PAGALBA]** - the Client will be directly connected to an online consultant.



If there are currently non-working hours (offline) - Only the contact form will be opened:

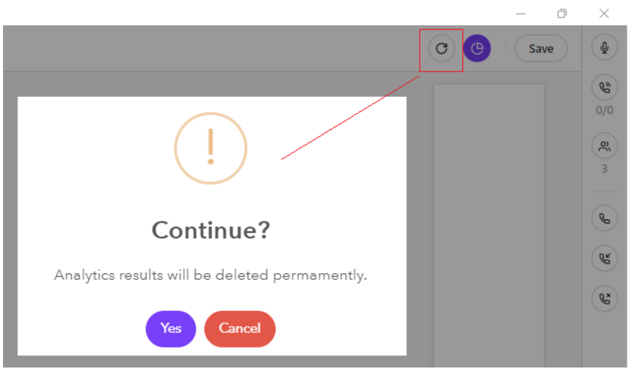


CHATBOT ANALYTICS:



After clicking on the cake-shaped button at the top, you will see the customer's clicks on each chatbot selection. Seeing the indicators - you will be able to adjust the corresponding selection, or remove it.

If you want to undo these indicators, you should press the following button:



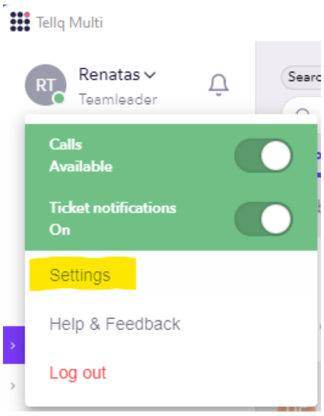
ACTIVATION OF CHATBOT IN THE TELLQ SYSTEM

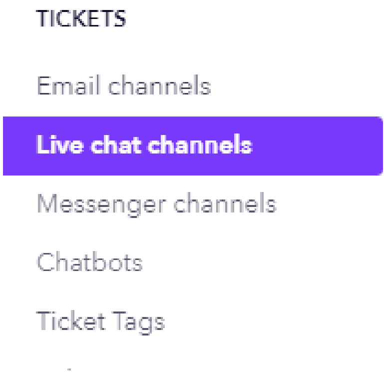
You can activate the already created Chatbot as follows:

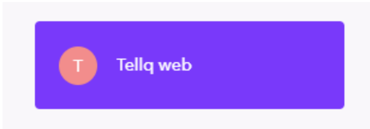
Click on your Teamleader name - in the left upper corner of the window. In the box that opens, click on the " Settings"

in the Tickets section, select - "Live Chat Chanels"

Select your Live Chat channel on which you want to put ChatBot.

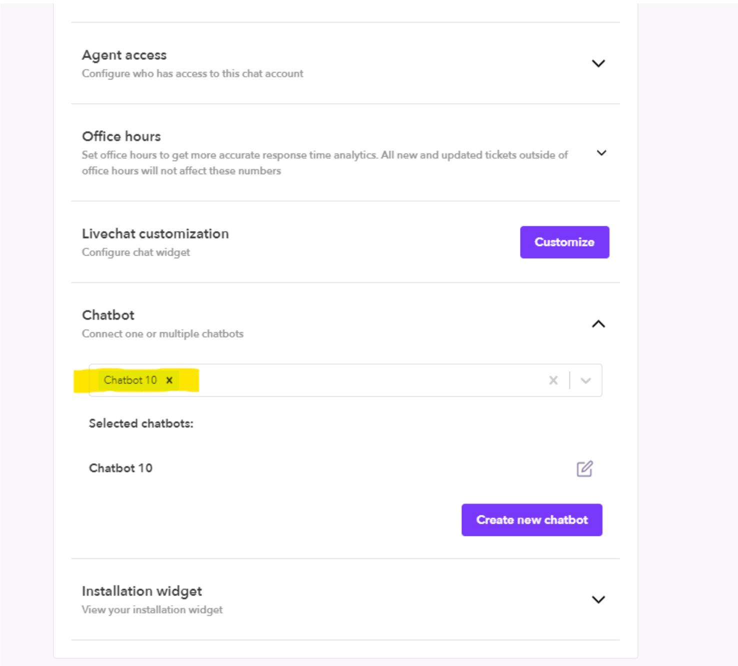






Press the chatbot selection and in the window that opens, select the chatbot you created earlier

If you have done everything correctly, it should look like this:

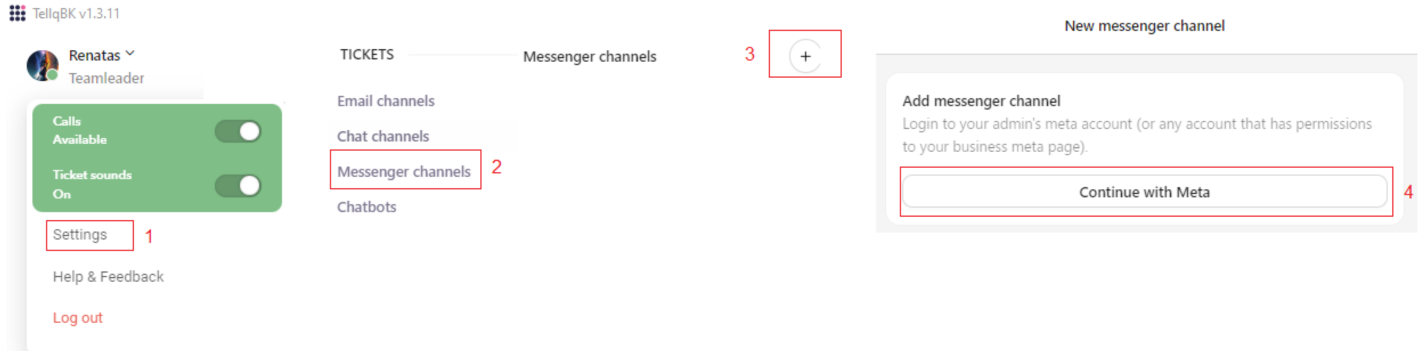


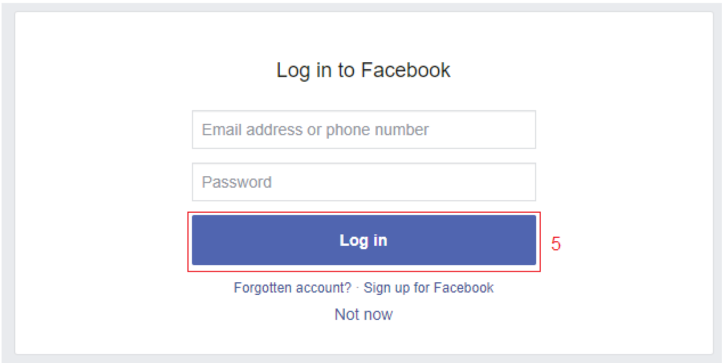
From now on, your Chatbot is activated and will work according to the set logic tree.

From this point on, you can check the operation of your Livechat tree on your Live chat Widget.

MESSENGER CHANNELS

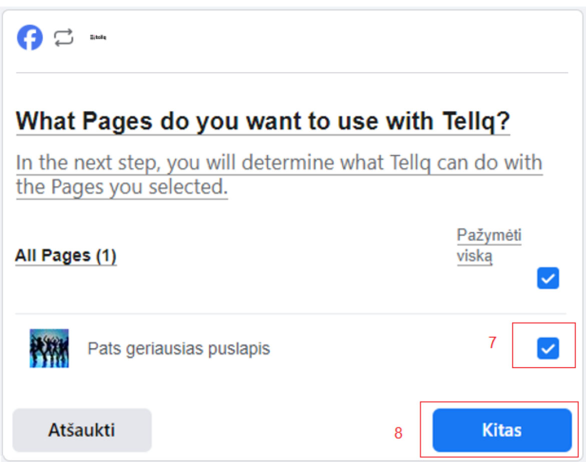
In order to add your company's Facebook account, you first need to have a verified facebook page. If you already have a Facebook account created and want to add it to the Tellq system - see this instruction.

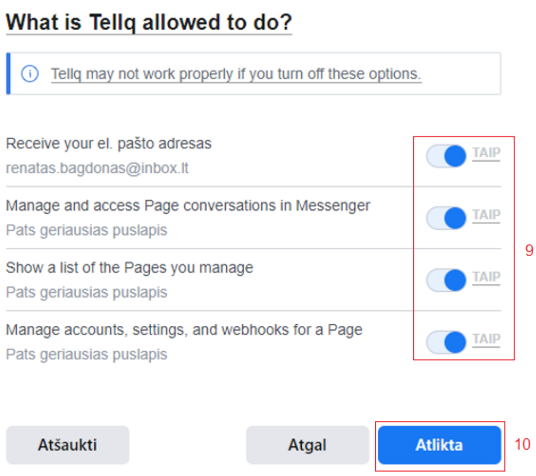


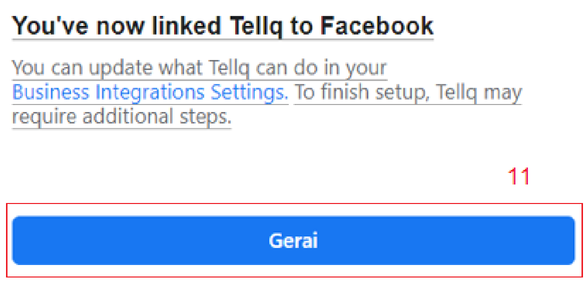


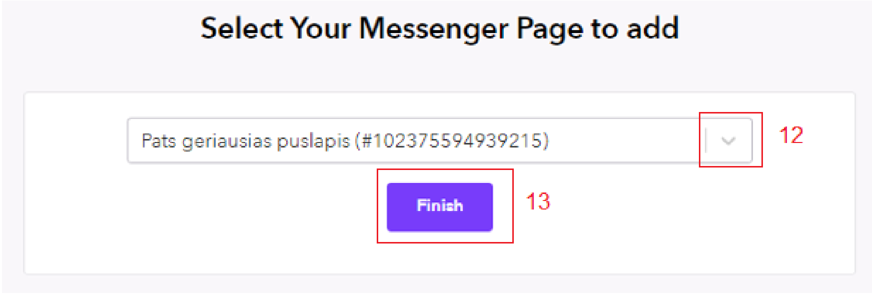
1. Click on your name and select >> Settings.
2. Select Messenger channels.
3. Press the + symbol to be able to add the channel.
4. Select Continue with Meta
5. Log in to your Facebook admin account with your login details.
6. After entering the logins, confirm your identity by pressing this button.
7. Select your company account that you want to add to the Tellq system.
8. Click "Next" to confirm your choice.
9. In this selection, select all options.
10. Press done and confirm the selections.
11. If all goes well, you should see a message that will warn you that you can always edit the settings on Facebook in Business Integrations Settings

Confirm by pressing the option "OK"

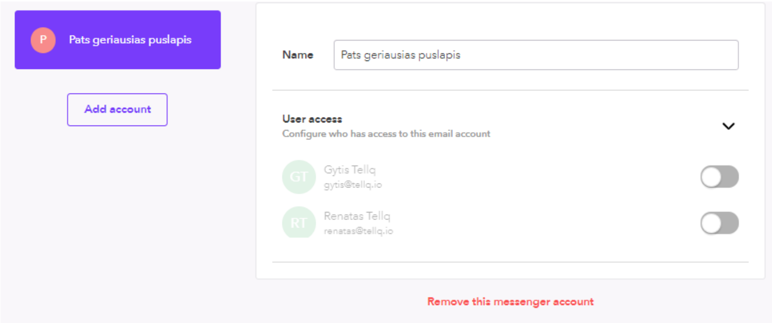








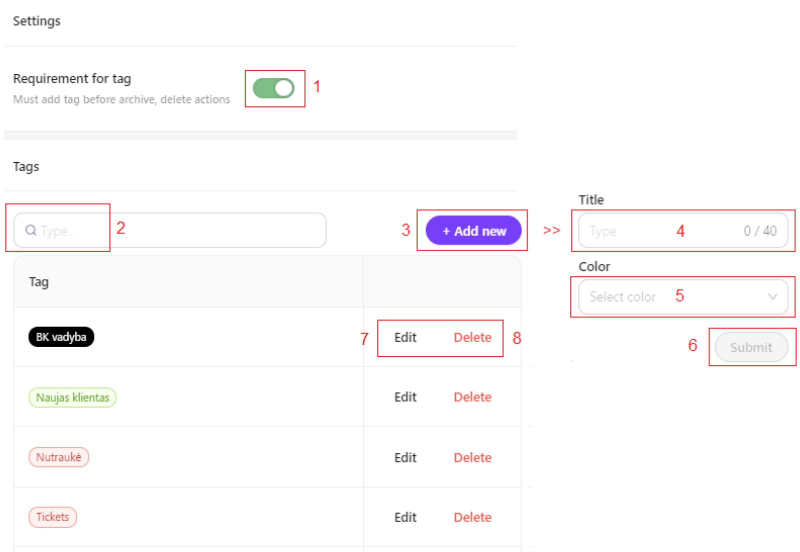
12. Select your added company from the list.
13. Click on the "Finish" button. After completing these steps, reboot the page.



14. After the reboot, we will see that we have added our company's Facebook account to the Tellq application.

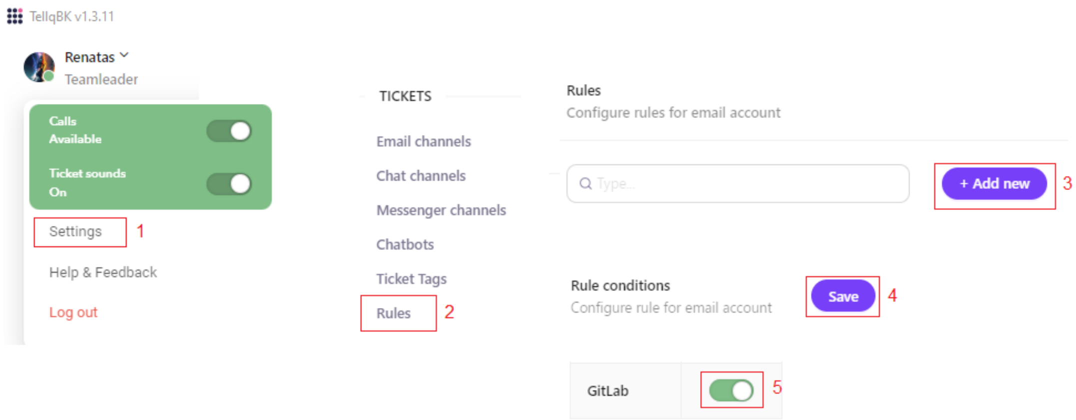
<u>We can also completely remove the account added from the system.</u>

TICKET TAGS



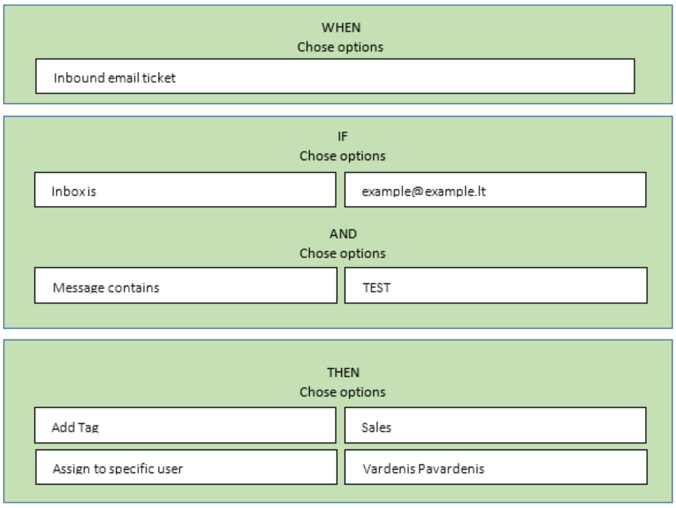
1. You can determine whether the TAG will be mandatory or not.
2. Tag search string.
3. Add a new TAG
4. TAG name
5. TAG color
6. Confirm newly created TAG
7. Edit the TAG you created
8. Delete the created TAG

EMAIL RULES



1. Click on your name >> settings.
2. Select Rules.
3. Select + Add new.
4. Save the created rule.
5. Turn on the created rule.

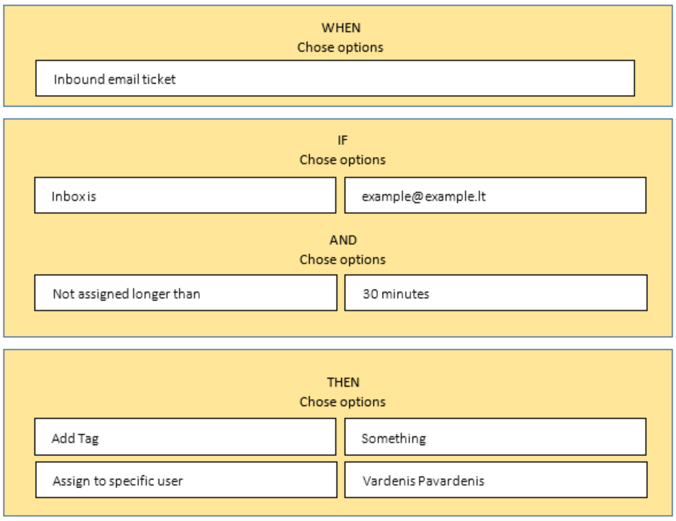
EXAMPLES OF AUTOMATIC RULES



RULE AND EXPLANATION

WHEN inbound email ticket **IF** inbox is example@example.lt **AND** message contains TEST **THEN** add tag Sales, assign to specific user Vardenis Pavardenis.

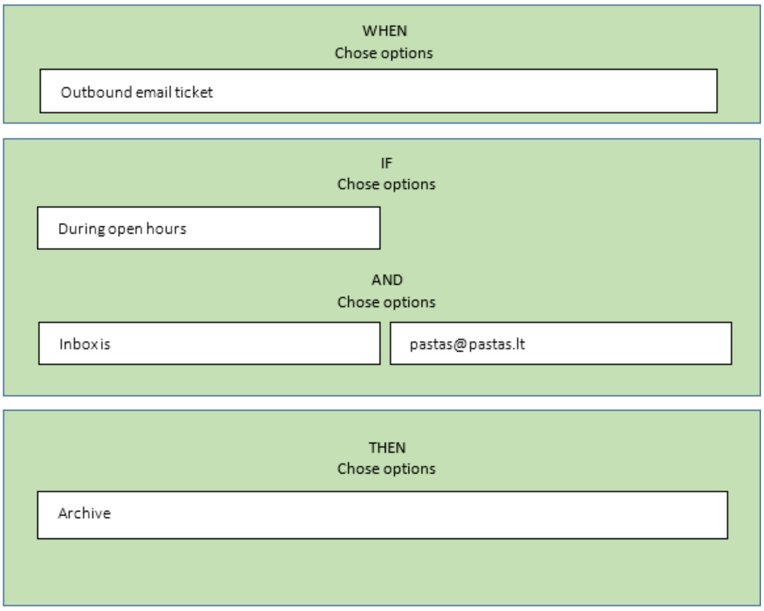
If a letter comes to the system to the mailbox example@example.lt and the word "TEST" is selected in the message For such a message, the system will put a tag "Sales" and assign it to the specified agent "Vardenis Pavardenis".



RULE AND EXPLANATION

WHEN inbound email ticket **IF** inbox is example@example.lt **AND** not assigned longer than 30minutes **THEN** add tag Something, assign to specific user Vardenis Pavardenis.

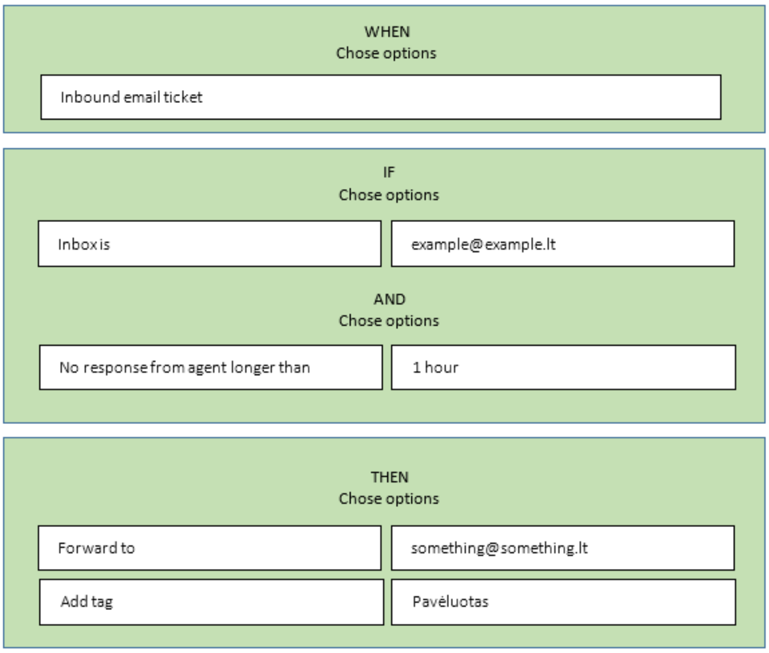
If a letter comes to the system example@example.lt to the mailbox and the letter is not assigned to any of the agents for more than 30 minutes - the system will put the tag "Something" and assign the letter to the selected agent Vardenis Pavardenis automatically.



RULE AND EXPLANATION

WHEN outbound email ticket **IF** during open hours **AND** inbox is pastas@pastas.lt **THEN** archive.

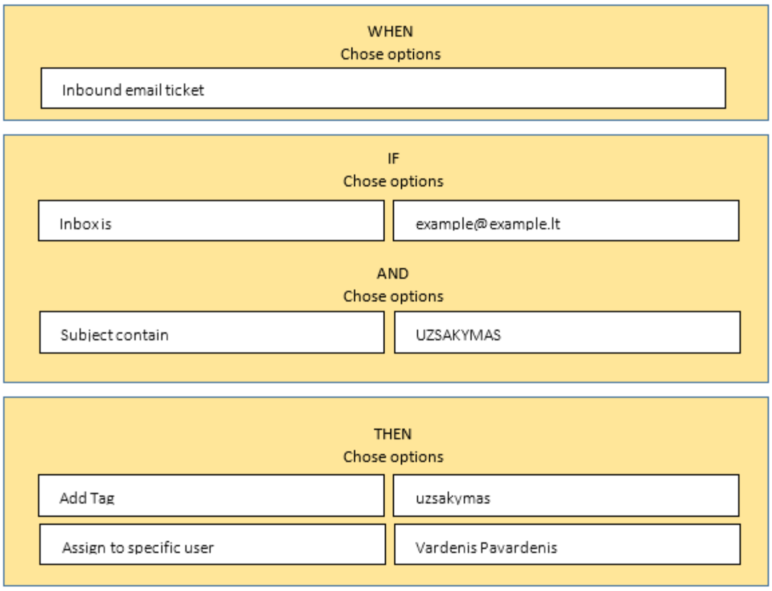
If you create a message during Business Hours and send it from the mailbox pastas@pastas.lt , the System will automatically archive such a message after sending it.



RULE AND EXPLANATION

WHEN inbound email ticket **IF** inbox is example@example.lt **AND** no response from agent longer than 1 hour **THEN** forward to something@something.lt, add tag late.

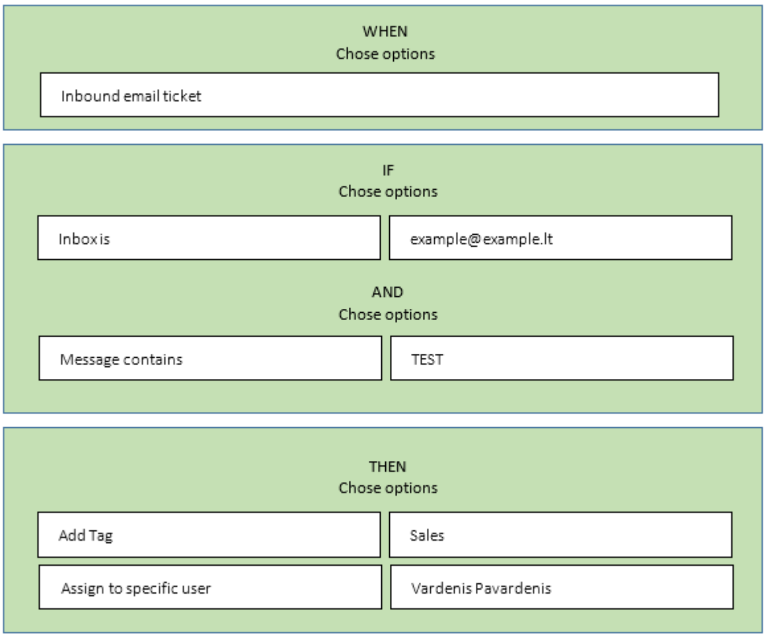
If a letter comes to the system to the mailbox example@example.lt and the client does not receive a response from the agent for more than 1 hour, such a letter will be forwarded to the something@something.lt and the System will put the tag "Overdue".



RULE AND EXPLANATION

WHEN inbound email ticket **IF** inbox is example@example.lt **AND** subject contain „užsakymas“ **THEN** add tag užsakymas, assign to specific user Vardenis Pavardenis.

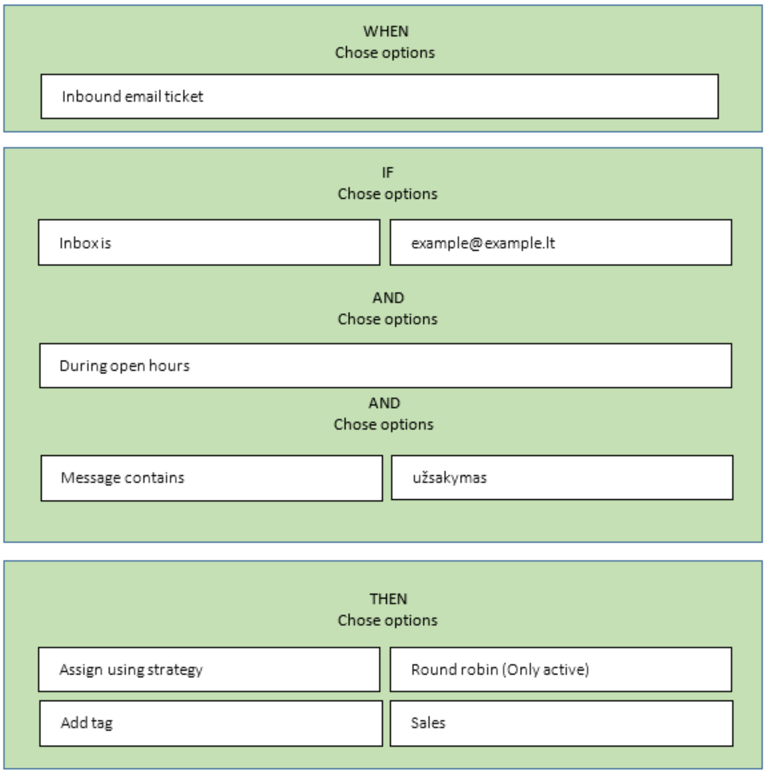
If a letter comes to the system to the mailbox example@example.lt and the name "subject" is an užsakymas, for such a letter the System will put a tag "užsakymas" and assign it to the selected agent Vardenis Pavardenis.



RULE AND EXPLANATION

WHEN inbound email ticket **IF** inbox is example@example.lt **AND** message contain TEST **THEN** add tag sales, assign to specific user Vardenis Pavardenis.

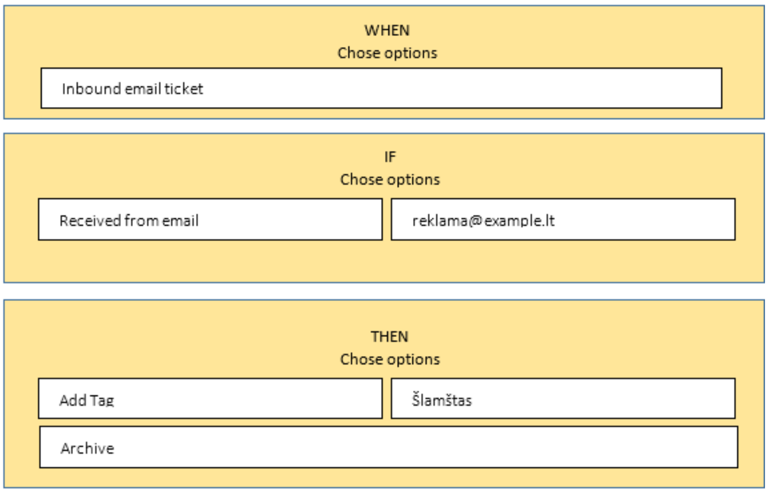
If a letter comes to the system in the mailbox example@example.lt and the message contains the word TEST, for such a letter the System will put a tag "Sales" and assign it to the selected agent Vardenis Pavardenis.



RULE AND EXPLANATION

WHEN inbound email ticket **IF** inbox is example@example.lt **AND** During open hours **AND** message contain užsakymas **THEN** assign using strategy Round robin (only active), add tag sales.

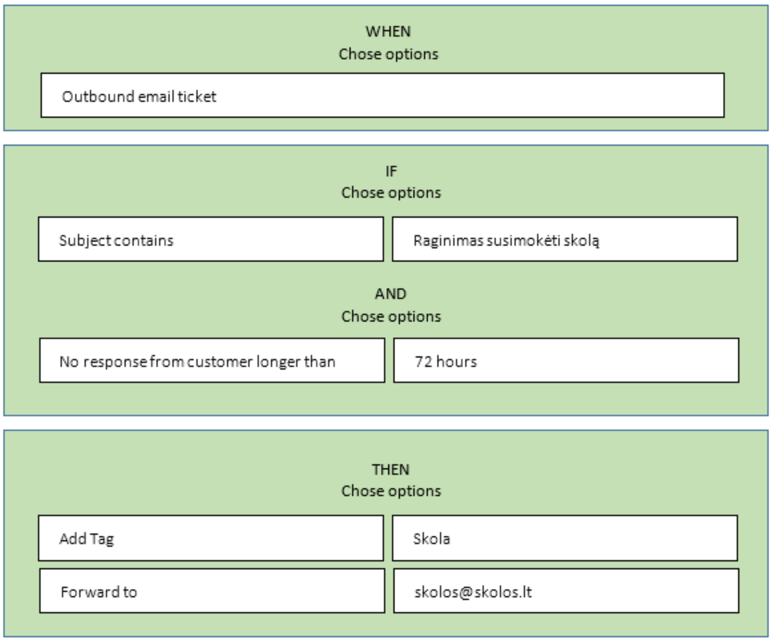
If a letter comes to the system to the mailbox example@example.lt during the work and the message contains the word užsakymas, such ticket will be assigned to one of the connected agents using the round robins policy and the tag "Sales" will be placed.



RULE AND EXPLANATION

WHEN inbound email ticket **IF** received from email reklama@example.lt **THEN** add tag Šlamštas, and Archive.

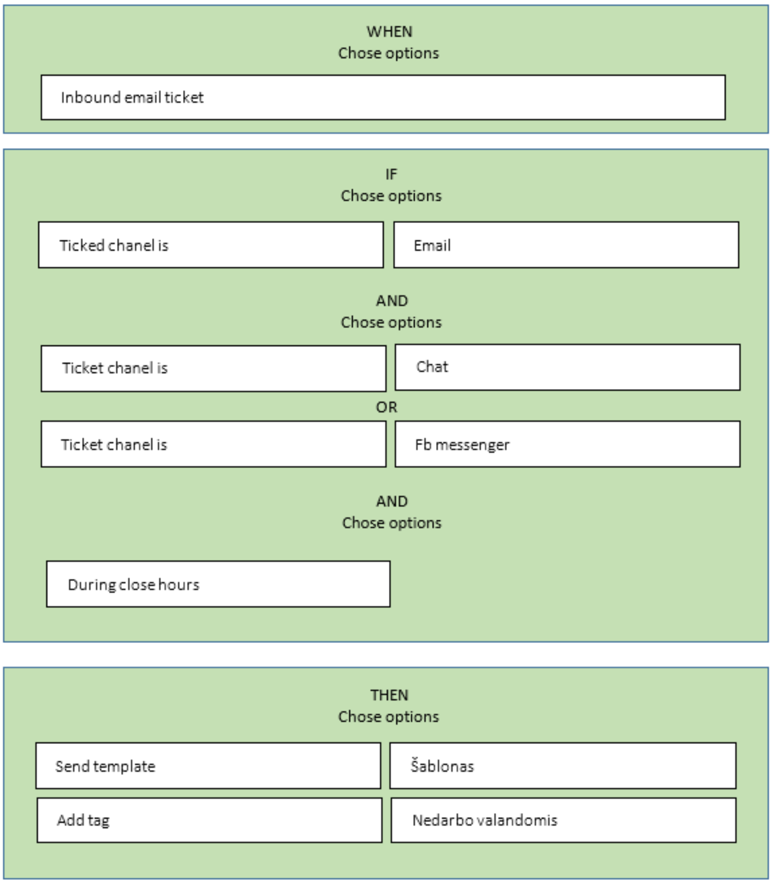
If you receive a letter from the mailbox reklama@example.lt
the System will put the tag "Šlamštas" and archive.



<u>RULE AND EXPLANATION</u>

WHEN outbound email ticket **IF** subject contains Raginimas susimokėti skolą **AND** No response from customer longer than 72 hours **THEN** Add tag skola, Forward to skolos@skolos.lt

If you sent a letter from the system and in the subjeck section there is a phrase " Raginimas susimokėti skolą " and you do not receive any response from the client for 72 hours, then the tag "Skola" will be placed on such a letter and forwarded to the skolos@skolos.lt



<u>RULE AND EXPLANATION</u>

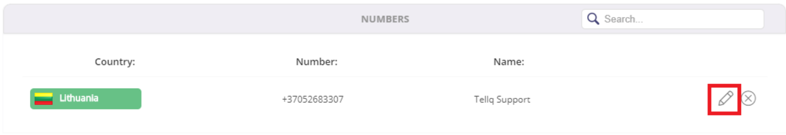
WHEN inbound email ticket **IF** Ticket chanel is Email **AND** ticket chanel is Chat **OR** Ticket chanel is FB messenger **AND** During close hours **THEN** send template Template, add tag During Non-working hours.

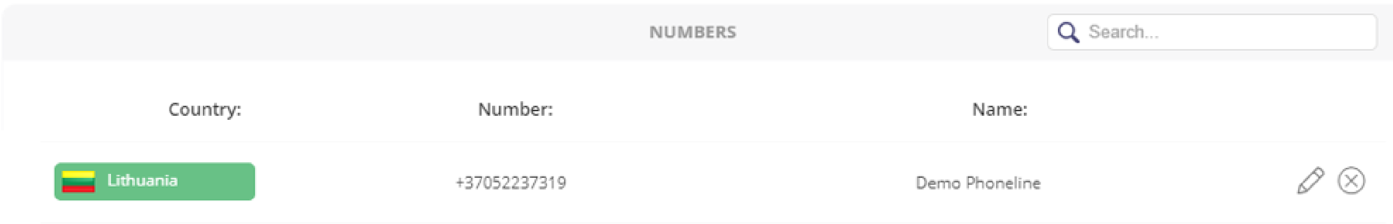
If a letter comes to the system during non-working hours and it is from Email, chat or FB messenger, a template from the system will be sent as a response to the letter and the tag "During non-working hours" is applied to such a letter.

CALL DISTRIBUTION

Selecting this setting pops up a login window in which you should enter your TEAMLEADER LOGINS.

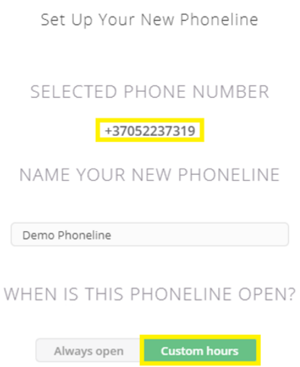
After logging in, select the NUMBERS section and press the pencil next to the number you want to edit.



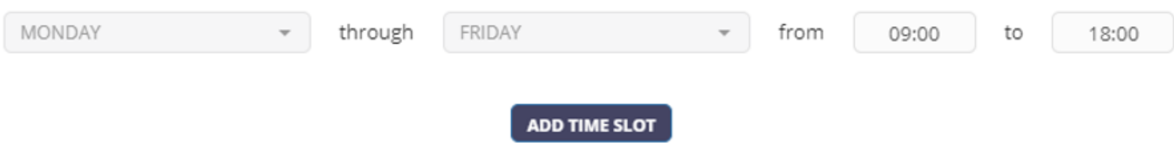


In order to change the settings of the numbers added in the system, you need to press the "Numbers" button in our app and you will see all the numbers added to the system, which you can configure according to your desire.

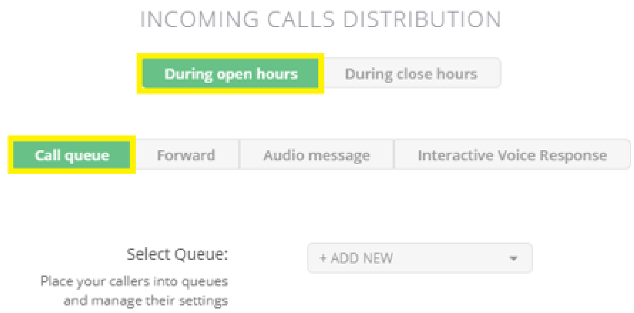
To start the configuration of the number, press the pencil symbol.



1. In the window that opens, first check if you are changing the settings for that phone number. If the number is correct, you can create a name for your phone line.
2. Select the settings for working hours. If you selected **Always open** the number will be active and available around the clock at 24/7.
3. If you selected **"Custom hours"** you can set the exact settings for working time during WORKING HOURS:

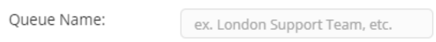


4. The next step is to set **the "Incoming call settings" during** business hours:

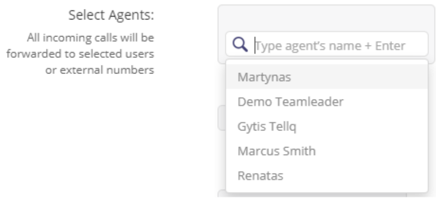


The first and most popular option is call queue.

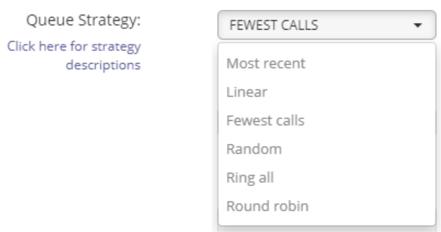
Let's click on this selection and add the new Queue settings by selecting +ADD NEW



Let's create a name for our phone line.

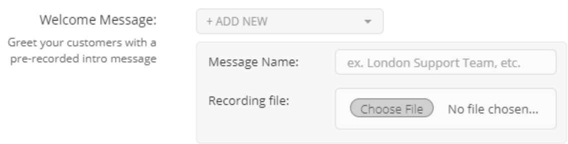


Let's add the desired agents to this line. We click with the mouse cursor on the search line and select the agents in the list.



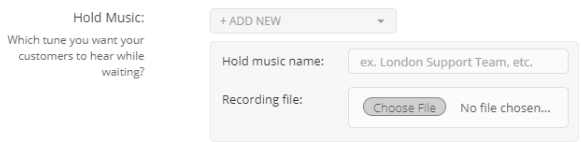
Ringing Strategy:

Most recent – Will call the last agent who spoke.
Linear – Will call everyone in a row if more than one agent is added.
Fewest calls – Will call the one who has the fewest calls.
Random – Will call randomly.
Ring all – Will call everyone at once.
Round robin – Calls will go in a circle.



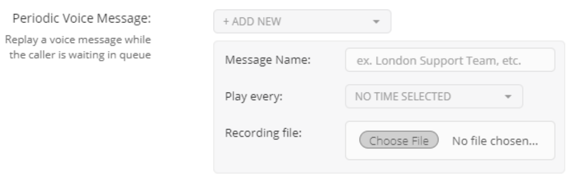
In this place, you can upload a welcome message to the system. When a customer hits this phone line, they'll hear a message —the one you'll put here.

Very important: The message should be only in .wav format and not exceed 256kbps



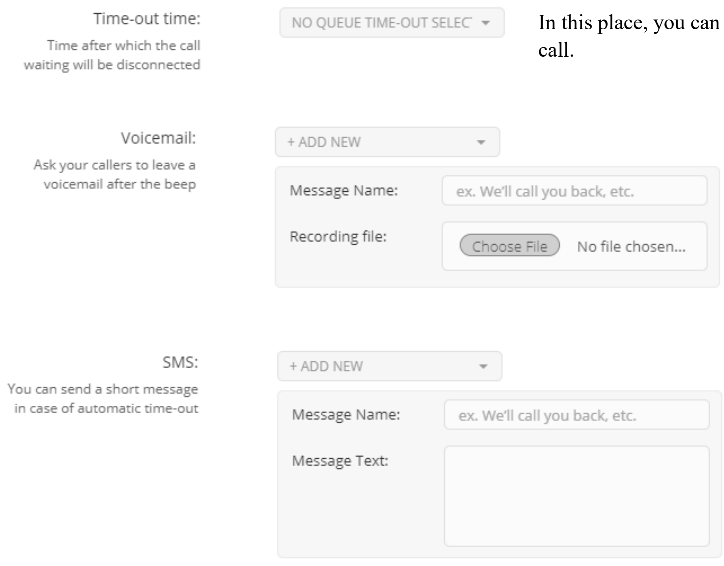
In this place, you can upload Hold Music to the system, or choose from the list. When a customer calls to this phone line, they will hear the waiting melody that you choose in this place.

Very important: The message should be only in .wav format and not exceed 256kbps



In this place, you can upload Periodic Voice Message to the system. After uploading a periodic voice message and setting the desired time interval - the client will hear this message every time a certain time passes.

Very important: The message should be only in .wav format and not exceed 256kbps



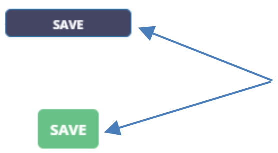
In this place, you can determine after how long the system will terminate the client's call.

In this place, you can put a Voicemail message after which the client will be able to leave a voice message after hearing the signal, which you can listen to in the Logs section.

Very important: The message should be only in .wav format and not exceed 256kbps

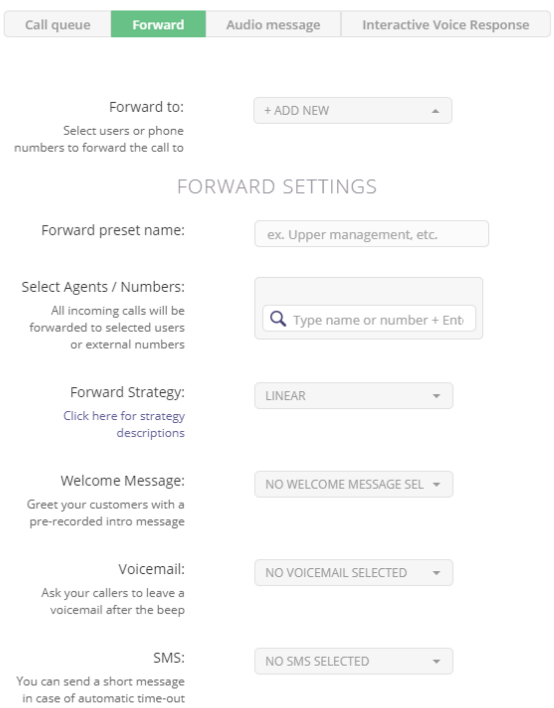
In this place, you can create an "SMS message" which will be sent automatically after the termination of the call.

You need to enter the name of the message and the text of the message.



Very important: To save the new settings, you need to press these two "SAVE" BUTTONS.

5. **ENABLING THE FORWARD FUNCTION FOR INCOMING CALLS.** In this place we can enable call forwarding for the selected agent or external phone number.



Let's create a name for this Forward setting.

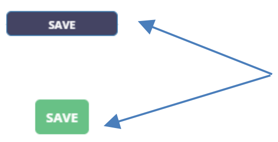
Let's enter the name of the agent to whom the calls will be forwarded or the external phone number in the following format: +37066666666 The number saved in the selection.

Let's choose "Forward Strategy" if more than one number or agent is saved.

You can add "Welcome message" How to add it read above.

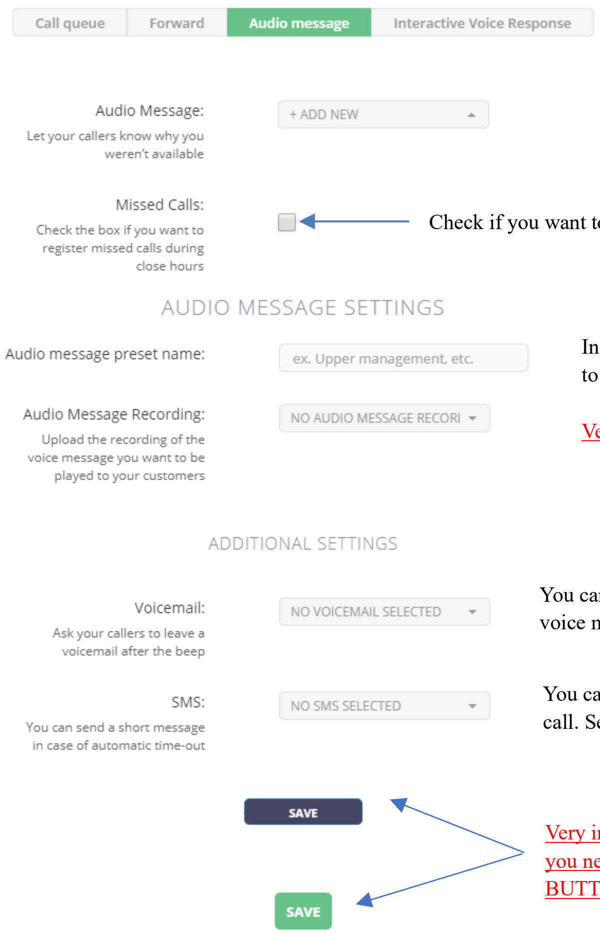
You can add a Voicemail message after which the client will be able to leave a voice message. See above for how to add it.

You can add an "SMS message" which will be sent after the termination of the call. See above for how to add it.



Very important: To save the new settings, you need to press these two "SAVE" BUTTONS.

6. **<u>ENABLING AUDIO MESSAGE FOR INCOMING CALLS.</u>** In this place, you can turn on the voice message in case the company is not working, or for some other reason you want the calling customers to hear a certain message.



Check if you want to record IN calls during business hours.

In this place, you can create a name and put <u>"Audio message"</u> with a certain message to the client. For example, for some reason, you are inaccessible.

<u>Very important: The message should be only in .wav format and not exceed 256kbps</u>

You can add a <u>Voicemail</u> message after which the client will be able to leave a voice message. See above for how to add it.

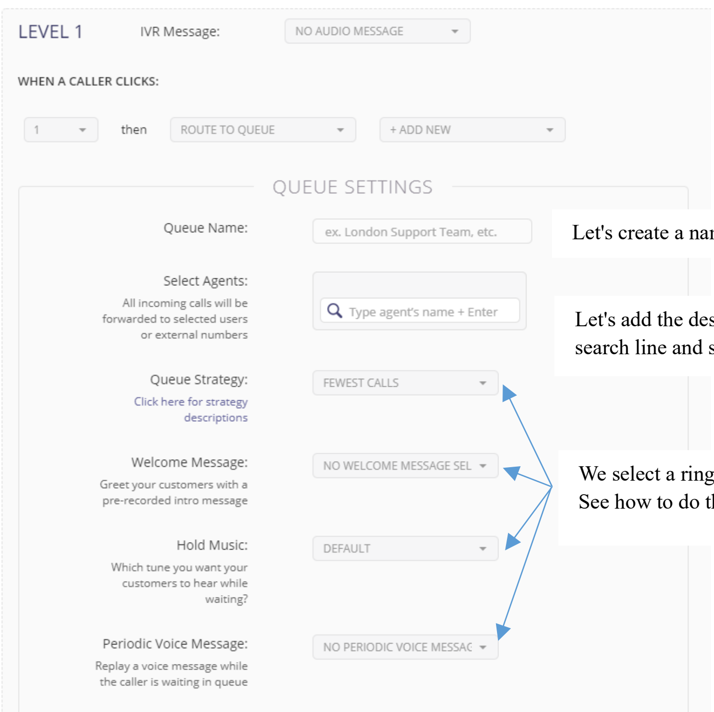
You can add <u>an "SMS message"</u> which will be sent after the termination of the call. See above for how to add it.

<u>Very important: To save the new settings, you need to press these two "SAVE" BUTTONS.</u>

7. **<u>ENABLING IVR (INTERACTIVE VOICE RESPONSE) IN THE SYSTEM.</u>** In this place, you can create interactive voice response (IVR) - this is an "automatic secretary" that divides IN calls according to the client's preferences, example. "Choose a topic: Info -> click 1, Orders -> click 2."

The agent, receiving an IN call, will see what topic the client has chosen.

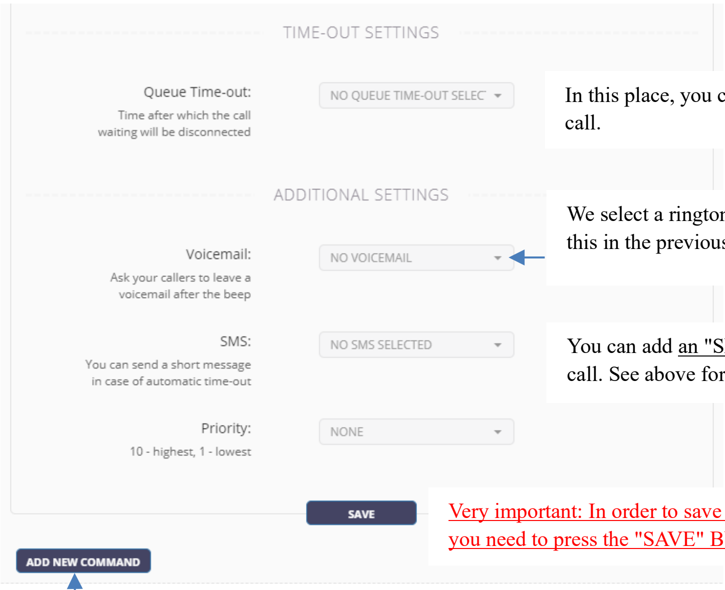
First, let's discuss <u>"ROUTE TO QUEUE"</u> Settings:



Let's create a name for this option.

Let's add the desired agents to this line. We click with the mouse cursor on the search line and select the agents in the list.

We select a ringtone strategy and upload audio messages to the system. See how to do this in the previous examples.



In this place, you can determine after how long the system will terminate the client's call.

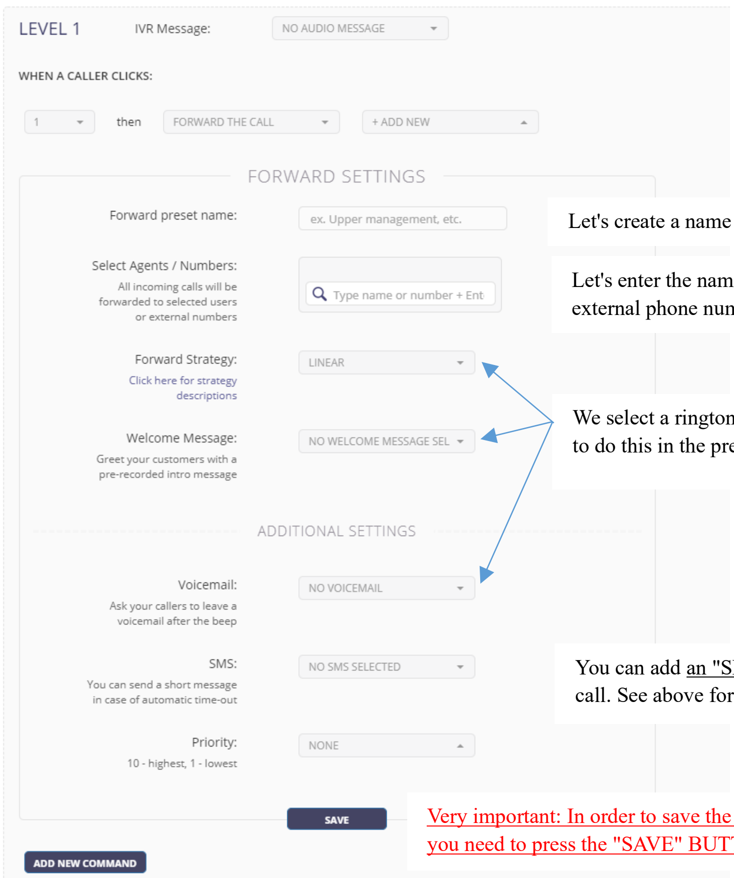
We select a ringtone strategy and upload audio messages to the system. See how to do this in the previous examples.

You can add <u>an "SMS message"</u> which will be sent after the termination of the call. See above for how to add it.

<u>Very important: In order to save the new settings, you need to press the "SAVE" BUTTON.</u>

If you want to create more options (2,3,4,5... etc) press the button located at the bottom:

<u>"FORWARD THE CALL"</u> settings in the IVR section.



Let's create a name for this option.

Let's enter the name of the agent to whom the calls will be forwarded or the external phone number <u>in the following format: +37066666666</u> The number

We select a ringtone strategy and upload audio messages to the system. See how to do this in the previous examples.

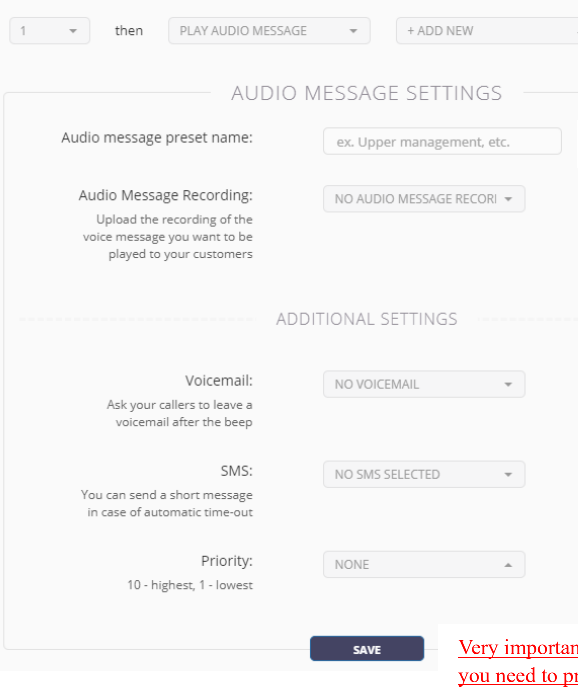
You can add <u>an "SMS message"</u> which will be sent after the termination of the call. See above for how to add it.

<u>Very important: In order to save the new settings, you need to press the "SAVE" BUTTON.</u>

If you want to create more options (2,3,4,5... etc) press the button located at the bottom:

After creating all the desired options, let's not forget to press the final "SAVE" button so that all settings are saved.

<u>"PLAY AUDIO MESSAGE"</u> settings in the IVR section.



Let's create a name for this option.

In this place, you can create a name and put <u>"Audio message"</u> with a certain message to the client. For example, due to certain reasons, you are inaccessible.

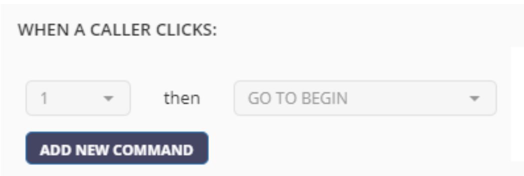
<u>Very important: The message should be only in .wav format and not exceed 256kbps</u>

You can add a <u>Voicemail</u> message after which the client will be able to leave a voice message. See above for how to add it.

You can add <u>an "SMS message"</u> which will be sent after the termination of the call. See above for how to add it.

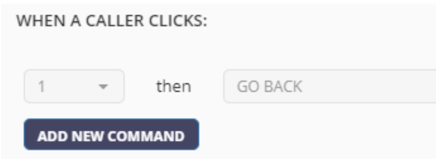
<u>Very important: In order to save the new settings, you need to press the "SAVE" BUTTON.</u>

<u>Setting "GO TO BEGIN"</u> in section IVR.



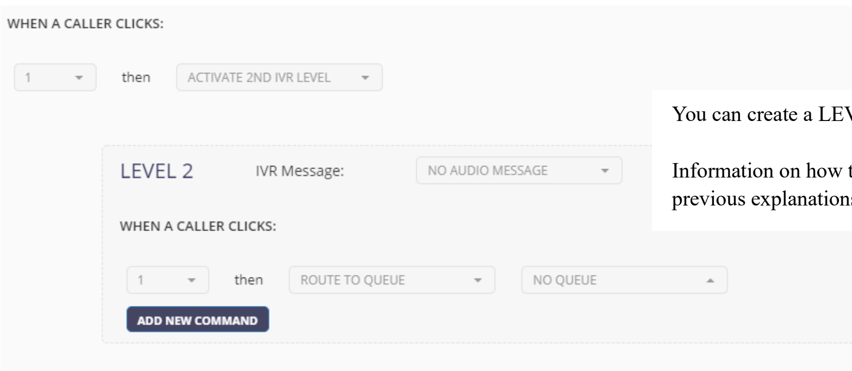
Selecting the Go to Begin setting will bring the customer back to the beginning and will hear all the available options again. Most often, this choice is the last if the client wants to listen to everything anew.

<u>Setting up "GO BACK"</u> in the IVR column.



Selecting the Go Back setting will return the customer a step back and will be able to choose other choices.

<u>"ACTIVATE 2ND IVR LEVEL"</u> settings in the IVR section.



You can create a LEVEL 2 exactly the same as level 1.

Information on how to arrange the level settings can be found in the previous explanations - at the top.

Selecting this option activates the next IVR level.

This option is especially convenient for directing the client on the right topic. For example:

Level 1 IVR message: "Choose a language: Lithuanian -> 1, English -> 2, RU -> 3

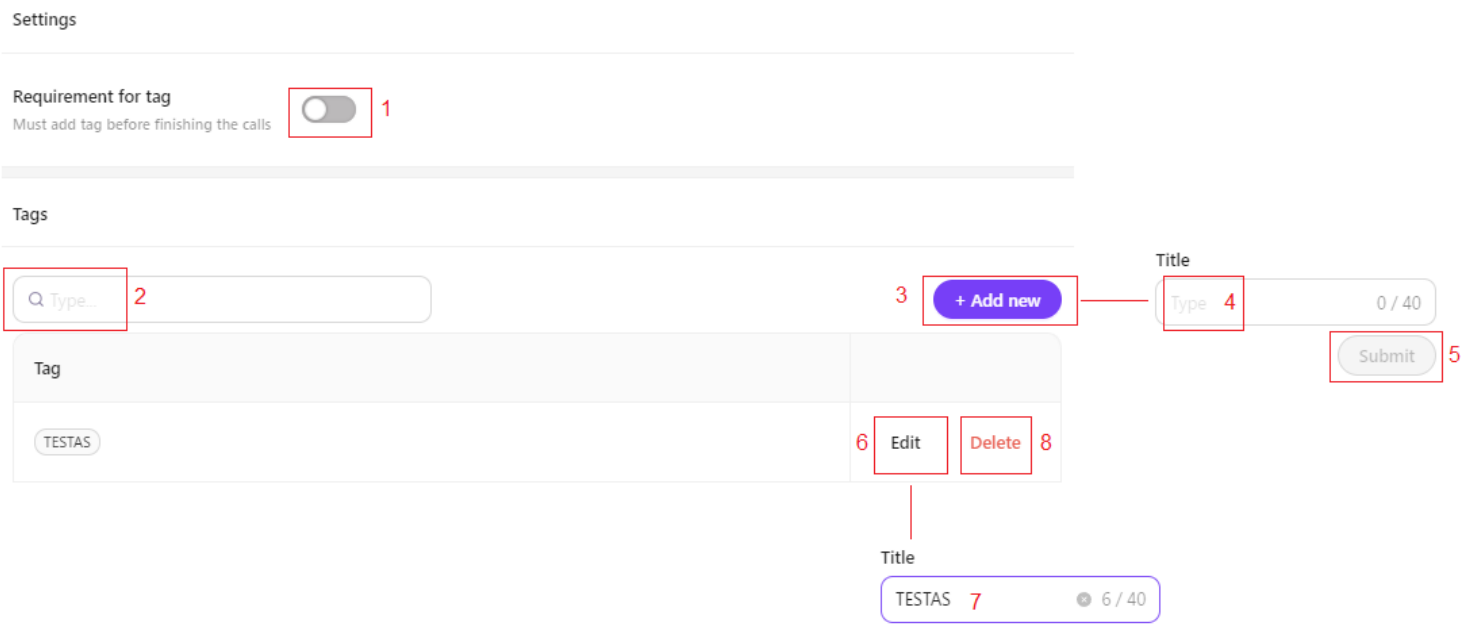
Level 2 IVR message: "Choose a city. Vilnius -> 1, Kaunas -> 2

Level 3 IVR message: Already be "Choose a topic: Info -> 1, Orders-> 2, Other issues -> 3

In total, 3 ivr levels are possible, with 10 IVR options for each level (for each level, the client can press from "0" to "9" button presses).

IMPORTANT TO REMEMBER: You can edit each row/selection by pressing a pencil next to the appropriate row. After the changes are made, do not forget to press the blue Save button and then the green Save button.

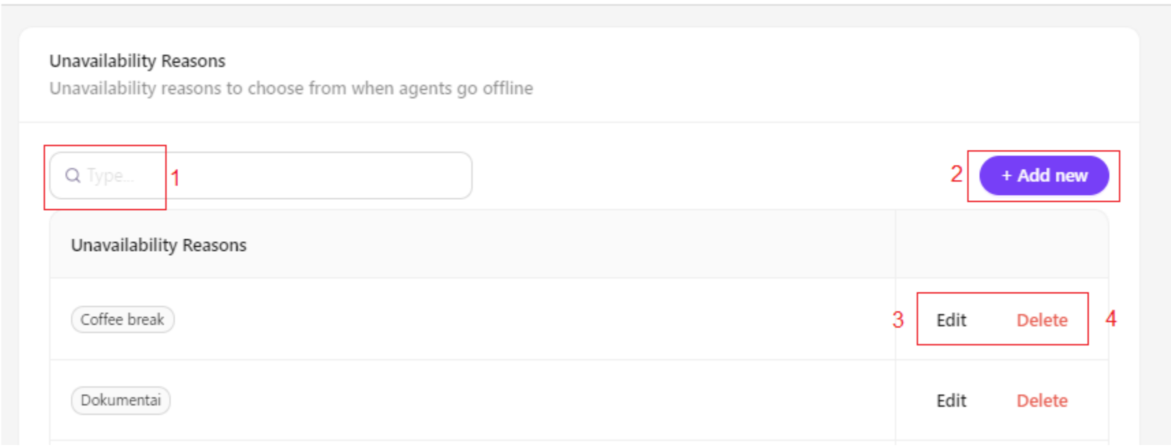
CALL TAGS



1. Put a checkmark if you want "Call tag" to be mandatory, if you want to end the conversation without putting a "Tag" you won't be able to do so.
2. TAG search if you have more of them.
3. Creating a new TAG.
4. Type a name for the new TAG.
5. Click Submit to save the new TAG
6. Edit an existing TAG.
7. TAG title edit string.
8. TAG delete button.

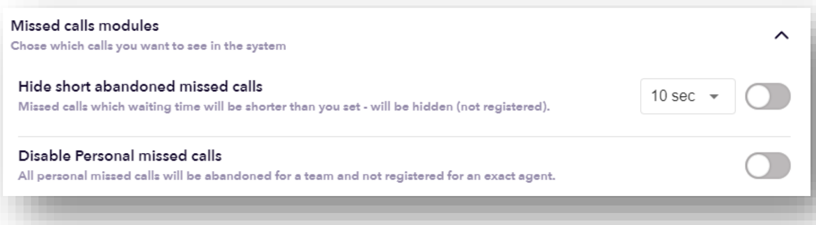
UNAVAILABILITY REASONS

Unavailability Reasons

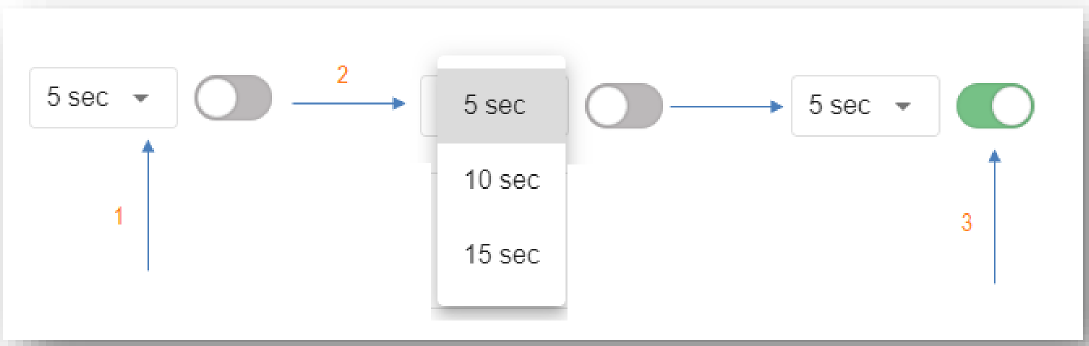


1. Peieška's line.
2. Add a new break.
3. Edit break.
4. Delete the break.

CALL CENTER SETTINGS



Hide short abandoned missed calls is a module that, when enabled - will hide all missed system calls until a set time. Select the desired time and turn on the setting. The setting will remove all missed calls to your set time and will no longer represent them in the LOGS section. At the same time, in the logs section, you will also turn off such missed calls, when the customer did not even get to the line (did not press any choice).



1.Select the time until which missed calls will not be recorded (the client's "waiting time" until the time you set).

Example: We set it to 15 sec. All these missed calls will not be recorded in the missed calls section and in the LOGS section. Important: Enabling the module – the settings will only take effect for new missed calls.