

Omnichannel

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Ring Strategies

Webchat

Campaign Settings

Here Webchat campaigns will be created.

The configuration screen looks like the following:

The screenshot shows the WebChat configuration interface. The left sidebar contains various settings for the campaign, including Name, Service level, Bot when risk, Thresholds, Show agent name, Enable feedback, Enable email, Allow audio and video, Allow attachments, Offline message, Campaign image, Autoanswer, and Canned Responses. The main area on the right displays a table of campaigns with columns for NAME, STRATEGY, and SERVICE LEVEL. The table lists four campaigns: BOT_WCH, consultationweb, Information, and WEB. The bottom of the screen has buttons for Generate code, See example, Wordpress Plugin, Delete, and Save.

Basic Configuration



- **Name:** Name of the Webchat's campaign.
- **Strategy:** Behavior that Webchat interactions will present. Visit [Strategies](#) for more information
- **Service Level:** The level of service is the percentage of chats that were attended/abandoned by the agent before/after a stipulated time limit.
- **Schedule:** Schedule in which the Webchat campaign will be available. Visit [Inbound voice campaigns](#) and see 'Schedule' for more information

- **Welcome**

The welcome message is shown on the client's window when the Webchat campaign is available. The user can configure three different messages in its own language, es (SPANISH), en (ENGLISH), and pt (PORTUGUESE). Select a language and write the personalized welcome message, then select another language, and so on.

- **Out of Time**

The message will appear to the client if the campaign is out of time. The user can configure three different messages in its own language, es (SPANISH), en (ENGLISH), and pt (PORTUGUESE). Select a language and write the personalized Out of Time message, then select another language, and so on.

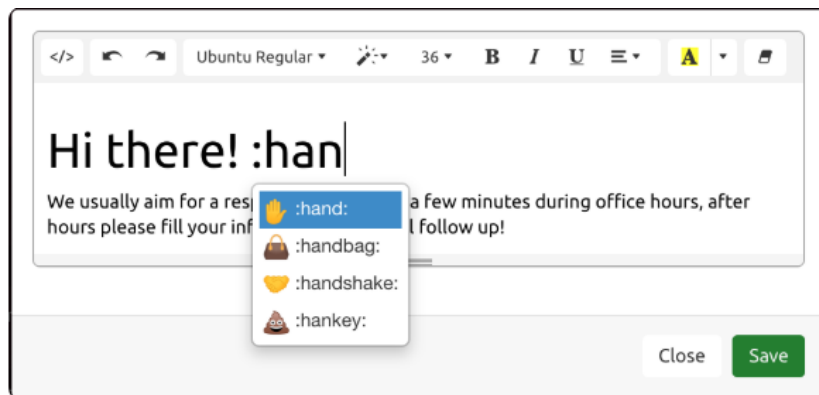
- **Message Not Available**

The message appears when there are no agents available to attend an interaction in the queue. The user can configure three different messages in its own language, es (SPANISH), en (ENGLISH), and pt (PORTUGUESE). Select a language and write the personalized Message Not Available message, then select another language, and so on.

- **Feedback**

At the end of the interaction, the message defined in this field will be displayed.

 Every message can be customized:



 Check out the following link to see the complete list of emojis you can use: [Complete list of github markdown emoji markup](#)

Each emoji can be edited, location in text and size:

Other Fields

- **Maximum Interactions per Agent:** Limits the number of active interactions the agent can get. The rest of the interactions wait in the queue.
- **Quality:** A quality model can be assigned to the campaign. When an agent closes the interaction, a quality model will appear so the agent can respond to it. This response can be seen on the Webchat Recordings.
- **Automatic Agent Message:** This message will be sent automatically to the client when the interaction starts.

Email

Email Management

To manage the configuration of the email campaigns in uContact, it is necessary to have a user with administrator permissions in the system.

Basic email settings

Here you can create email campaigns.

Campaign data

- **Name**
Name of the email campaign.
- **Service level**
It is the time in which the interactions that arrive at the campaign must be answered, if the waiting time is greater than that stipulated in the field, the level of service drops.
- **Strategy**
It is the behavior that the campaign will have. For more information on the different strategies.
- **Schedules**
Schedule in which the campaign will be available, that is, with available agents to handle interactions. To add a schedule configuration is with the '+' button or remove a selected one from the list with the '-' button.
- **From name**
It is the name with which the email account assigned to the campaign is displayed when it reaches the recipient.

Email Data

- **Account**
It is the mail by which emails will be received.
- **Password**
The password assigned to the account. If it is written incorrectly, it will not be possible to create the new campaign, the user will be warned in case this happens.

- **Outbound SMTP**

Protocol for simple transfer of assigned mail. This is mandatory to send emails.

- **Inbound IMAP**

Internet message access protocol assigned. This is mandatory only if Receive Emails is active.

- **Port**

Port number assigned for each protocol.



To finish the creation process, the user must click the "Save" button.

Parameters ■

Maximum interactions per agent

The number of interactions of this campaign that the agent can have at the same time. **It is only required for the nocall strategy.**

Enabled

If it is checked, the campaign can be used.

Receive Emails

If enabled, emails sent to the configured email address will be queued as an interaction to the portal. In addition, the IMAP and POP fields will be mandatory. If this checkbox is empty, the campaign will not require incoming ports and will not receive emails either, but it will be able to send.

Signature

Within the Templates section, a signature template can be created and assigned here. When an agent answers/composes an email via this campaign, the assigned signature will be loaded automatically.

Enable qualification

When this check is active, it enables two more fields that are used to configure the qualification of outgoing emails.

SMS / WAB

SMS/Whatsapp Providers

For more information on the creation of SMS or Whatsapp providers, go to the corresponding pages: [SMS](#) [Whatsapp APIs](#)

SMS/Whatsapp Campaigns

After creating the provider, we can start creating SMS/Whatsapp campaigns.

The screenshot displays the 'SMS / WhatsApp' configuration interface. The left panel contains the configuration form, and the right panel shows a table of campaigns.

Configuration Form (Left Panel):

- Name:** sms1
- Bot Name:** Bot Name
- Bot when finish:** 10
- After Hours:** A/ter Hours
- Thresholds:**
 - 40-60, 60-80, 80-100-100, 9-1
 - 23123123
- Maximum interactions per agent:** 0
- Transfer timeout (seconds):** 0
- Automatic termination due to inactivity (minutes):** 1
- Schedules:** mon,tue,wed,thu,fr:09:00-18:00
- Enabled:** ☒
- Canned Responses:** (Empty table with columns for text and description)

Table (Right Panel):

NAME	STRATEGY	SERVICE LEVEL
sms1	ringall	10

Showing 1 to 1 of 1 entries

Buttons: FIRST, PREVIOUS, 1, NEXT, LAST

Basic settings

- **Name**
Name to identify the SMS/Whatsapp campaign.
- **Service level**
The service level is the percentage of interactions that were attended/abandoned by the agent before/after a stipulated time limit.

- **DID-Ports**

In this field, you must enter a code (telephone number, alphanumeric, id, etc.) associated with the campaign for identification purposes. Generally, this information is provided by the provider and may vary.

- **SMS provider**

Clicking on the combo displays a list of all the SMS/Whatsapp providers that are registered in the system.

- **Strategy**

It is the behavior that the campaign will have. To learn more about the different strategies go to [Strategies - Omnichannel](#).

- **Schedule**

The hours in which the SMS campaign will be available, that is, with agents available to answer customer SMS. To add a schedule configuration you must add with the '+' button and a new window will appear or remove a selected one from the list with the '-' button.

✓ After saving your settings, you will see your campaign in the table on the right where you will find all the campaigns created in the system listed according to your security group.

Advanced settings

These parameters already have a default value for the correct operation of the campaign.

To know more go to [Important Concepts - Omnichannel](#).

Out of time

This will be the message that will be sent to the client if he sends a message while the campaign is out of hours.

Thresholds

These are metrics to carry out the statistics of the campaigns in real-time, they are measured in time (seconds).

- **Service level**

It is the expected time limit for the response of the chats by an agent.

- **Churn rate**

It is the elapsed time of chats to consider that they were abandoned by customers during the day.

- **Chat time**

Time elapsed to consider that the chat between agent and client reached the limit.

- **ACD**

The maximum number of customers waiting to be answered by a chat agent.

Maximum interactions by agent

Limits the number of active interactions an agent can have. The remaining interactions are queued. It is only used for nocall strategies.

Automatic termination due to inactivity (minutes): ▣

This setting allows you to configure the inactivity timeout (in minutes) after which an interaction will be automatically terminated. The timer starts **only when an agent has the interaction assigned**.

If the interaction is in a queue (for example, in a campaign) or is being transferred, the timeout does not run. Once the interaction is attended again, the inactivity timer resets to zero.

The same applies to incoming interactions: the inactivity timer begins only when an agent starts handling the interaction, **not** when it enters the queue.

If the configured value is **0**, automatic termination is disabled, meaning interactions will not be automatically closed due to inactivity.

Campaigns to Transfer: At this point, one or more campaigns can be selected; these will be the only ones to which generated interactions can be transferred. If none are specifically selected, transfers will be allowed to all campaigns. Additionally, dialers can also be selected. Selecting a dialer as a “campaign to transfer” does not enable transferring interactions to the dialersthemselves. However, when both settings — “Historic interactions from all campaigns” and “Show only campaigns available for transfer” — are enabled, the active interaction history will also load messages sent by the dialers selected as “campaigns for transfer” when loading previous messages.

Enabled

The system can have a campaign registered that is not running without having to delete it completely, in this way the supervisor will not lose relevant data. If it is checked, the campaign can be used.

Pre-setted responses

The campaign may have pre-written responses, which makes it easier and faster for the agent to interact with the customer.