Buzzeasy Teams Admin Guide

Admin Guide

03 January 2023

redcentric

AGILE • AVAILABLE • ASSURED

Contents

Buzzeasy Teams Admin Guide

This document details the administration portal elements of the Buzzeasy Teams Omni-Channel Contact Centre service.

Logging into the Buzzeasy Portal

Discover how to logon to the Buzzeasy administration portal in this section of the guide.

How to Login

As an administrator or supervisor user, you have a secure web address, or URL through which you access the Buzzeasy portal.

The URL is: https://betaportal.buzzeasy.com

You should keep this URL as a favourite, or bookmark, in your internet browser.

To login, follow these steps:

- Navigate to the Buzzeasy Portal URL.
- Provide the Microsoft credentials associated to your Buzzeasy account.

TIP

Buzzeasy uses Microsoft Office365 credentials to log you in. You may need to provide these credentials when you first logon. Your browser may be able to store these details and provide your credentials automatically. This is dependent on your browser, browser version, and local security policy.

- Users configured to use multiple tenants may select tenant at login. Select your tenant to complete the login process.

You are now logged in. The top right corner will display your user name as well as the name of the tenant you are currently logged into.

Screen Layout and Structure

Introduction to the Portal Screen

Menu Side-bar

On the left of the screen is a vertical menu bar. Refer to this as the portal sidebar.

The side bar has six major groups:

- General
- Reports
- Email
- Voice
- Chat
- Integration

Each group is expandable and collapsible, the portal will remember your choice to expand or collapse a group. Each group contains various menus relevant to that particular group.

Header Bar And Your Profile

The portal features a horizontal top-bar. This is referred to as the header bar.

On the right side of the top-bar you will locate your profile.

Your profile displays:

- Your account name.
- The tenant you are logged into..
- Your profile picture, if set in your Microsoft Teams account.

You may click your profile to reveal additional options such as:

- The option to copy your tenant ID with one click.
- Your current portal role.
- A view profile link to quickly navigate to your portal user.
- The switch tenant option. This is only visible to you if your account is registered in multiple tenants.
- The settings button. This button allows you to configure your local settings and how information is displayed to you, such as:
    - Switch to/from portal's dark theme.
    - Set the first day of the week. This will affect how business days are displayed.
    - Date format. This will affect how dates are displayed.
        - Default will allow your browser regional settings to override the portal configuration.
    - Time format. Select between 12 hours or 24 hours format.
    - Elapsed time format.
- The sign out button. This will sign you out of the portal.

Blades, Modals And Navigation

When you select a menu entry, a blade opens and displays a list of resources for the particular menu entry.

Click on a menu entry to reveal additional details in a second blade. Secondary blades may have 1 or more tabs to pick from.

Tabs are carefully designed to provide you the most relevant information when you wish to view additional details for a given resource without overloading you with information that may be less relevant for your particular use case.

When it comes to provisioning, instead of blades, the portal features modals. Modals are similar in some ways to popups, however, modals dim the content in the background and blocks accidental clicks to be able to focus on the details a modal may require from the user.

Modals may feature one or more tabs, depending on the type of provisioning. For example, Bulk import features a single tab, while channel provisioning features at least 4 tabs.

Additionally, modals may be used in other areas of the portal besides provisioning where your full attention is required.

Designers

Designers feature a unique navigation experience to maximize the available screen space. This applies to Email templates and all workflows.

When you select one of these resources, the designer will automatically slide in and take all the available screen.

If you must go back to the list blade, you may use the bottom side of the screen scroll bar or you may click the name of the section to go back.

The Agents menu

This article describes the Agents menu. Find this menu in the Buzzeasy Portal > General > Agents.

Here is where you may provision, edit and delete agents and supervisors as well as manage their configuration.

Provision an agent

Provisioning an agent or supervisor is done through the Agents menu. Follow these steps to provision an agent:

- Navigate to the Buzzeasy Portal > General > Agents.
- Click the Create button. A new blade will appear.
- Search for the email address of your employee, then click on the results.
- Basic details obtained from your Azure Active Directory will be automatically filled in.
- Set the type of user. It can be Agent or Supervisor. The Supervisor option will allow the user to monitor, whisper and barge in using the Portal Reports.
- You may modify the name, email address, phone number, display name, and job title.
- Add the agent to an existing team or create a new team, then click Save.
- An invitation is sent to the email address provided.
- The user now clicks the invitation link in the email and confirms their email address. Once this is done successfully, the user is then redirected automatically to https://agent.buzzeasy.com and can now log in.

Bulk import agents

Buzzeasy supports agent provisioning in bulk as well to reduce the time spent on provisioning agents.

To use this feature, follow these steps:

- Navigate to the Buzzeasy Portal > General > Agents.
- Click the Bulk Import button. A modal is displayed.
- Download the CSV template. We recommend you open it with a text editor such as Nodepad++ as Excel may add invalid characters to the CSV.
- Fill in the required details in the CSV.
- Click the Select File to import and select the edited CSV.
- Assign the agents to teams (optional, you can do this later)
- Click the upload agents button.
- The file is now being validated. If it is invalid, an error message prompting you to adjust it will be shown, otherwise, an invitation email will be sent to all agents in the list.

NOTE You may only upload 100 agents at a time. Only Microsoft accounts are supported. All fields are mandatory and will be validated upon upload.

Edit an agent

Various edit options are supported, you may edit the following:

- User Details
  - Agent Name
  - Phone Number
  - Portal role (if any)
- Agent Configuration
  - Type. Promote an agent to a supervisor or demote a supervisor to an agent.
  - Display Name. This will be used for the email signature as well as chat connect messages.
  - Job Title. This will be used for the email signature.
  - Override work item thresholds. Turn this on if you wish to override the threshold specified on a tenant level for a particular agent.
  - Attributes. You may create new attributes, search and select from a list, modify their level, enable/disable them, or remove them from an agent.

NOTE Attributes are automatically removed from the system if they are not assigned to any agent. You may not edit the email address of an agent as it has been already associated with the agent's Buzzeasy identity. You may temporarily disable an agent or delete it altogether. Disabling an agent may take up to 24 hours, depending on the browser cache of the agent. Disabled accounts may not log in.

You may search for an agent you wish to edit by name, email address, or phone number using the portal's built-in search box. Additionally, you may filter the list to show only agents or only supervisors.

Batch Delete

The Agents menu uses the Selection Mode. Once enabled, it allows you to select multiple agents from the list and delete them in batch. You will be asked to confirm your choice as this action cannot be stopped. If you delete an agent by mistake, simply re-create the agent. Please note that this may affect historical reporting as the Buzzeasy identifier of the agent will change.

Agent global settings

Global settings will affect all agents across the tenant regardless of their type and team.

Access this section by navigating to Buzzeasy Portal > General > Agents > Settings button. A side blade will be displayed.

The following settings can be modified here:

- Wrap up timer.
    - Enable or disable auto-closing of tasks in the after-work/wrap-up state. When enabled, you must specify a timer. This timer represents the maximum duration of the task in the wrap-up state. Tasks automatically closed due to this timer elapsing will have the AfterWorkTimeout reason code.
- RONA timeout.
    - The RONA timeout specifies for how long an agent should be dialed. If this timeout is reached, the agent will be moved to the RONA break and the call will be routed to the next available agent.
- Default work item thresholds.
    - Controls how many task agents can hold at the same time. Overall counter controls the total tasks that can be held concurrently, while the media-type counters control the individual task count of a given media. Voice can only have the value of 0 or 1. This setting can be overwritten on a per-agent basis.
- Break names.
    - Configure the break names and their order as you wish them displayed to the agents. You may re-order them through drag and drop, create new break names or delete existing break names.

Users

Subject to their roles and associated permissions, users may access features in the portal.

Users and agents both share a Buzzeasy user ID, an agent is also a user from Buzzeasy's perspective, however, the agent entity is not expected to have Portal access. Additionally, Agents will not be shown in the Portal's Users menu.

Create a User

To create a user, navigate to the Buzzeasy Portal > General > Users. A listing of current users appears in a blade.

Click the Create button to get started. A second blade opens to the right of the User's blade.

Enter data in the following fields:

- Name. This is the user's real name.
- Email address. An invitation will be sent to this email address. The user will use this email address to log into the Buzzeasy Portal.
- Phone number. This field is optional, however, it may be helpful to have the phone number filled in, to be able to call that person without having to browse an additional internal active directory.
- Role. Select the role this user should have. You may create a new role or edit an existing role before assigning it to the user.
- Click the Save button.

An invitation is now sent to the email address of the user. Click the link in order to validate the account. After validating the account the user will be redirected automatically to the Buzzeasy Portal.

Elevate user to agent

You may elevate a portal user to an agent. Follow these steps:

- Navigate to the Buzzeasy Portal > General > Users.
- Find the user you wish to elevate. You may search by name or email address.
- Click the Change to Agent button and confirm the action. This action is not reversible, an agent cannot be downgraded to a user however, you may delete the agent and recreate it as a user.
- User is changed to an Agent, you may set the Agent specific details and click Save.

The Teams menu

This section describes the Teams menu, the purpose of teams and how to configure them.

Team definition

A team is a collection of agents and supervisor(s) grouped together for reporting purposes. An agent may be part of multiple teams, multiple supervisors may be responsible for a single, or multiple teams as well.

Team configuration is crucial when it comes to the agent and queue performance monitoring as queues may be assigned to a team or multiple teams as well.

The team acts as a filter for the live and today data the agents may see in their Agent Performance Dashboard, the tasks visible in their Queue listing tabs as well as the tasks the agent can manually assign through the cherry picking functionality.

Additionally, supervisors benefit from the same filter for the Portal's queue and team reports. These reports are automatically filtered by Team. A supervisor will not be able to see data belonging to a team the supervisor is not part of. This applies to agents as well.

Create a Team

To create your first team, navigate to the Buzzeasy Portal. Find the Teams menu under the General category.

The Teams blade displays, this blade contains a list of the available teams and their member count.

Click the +Create button. A secondary blade opens with no details pre-filled.

Enter a name for the Team in the Name of the Team field. This is a required field.

Select the queues associated to this team.

Add at least one member in the Members field. There is no limitation on the amount of a members a team can have, however, for the best experience we suggest to not add more than 20 members for a given team and up to 20 queues. This depends on how your business operates.

Once you add the agents and supervisors to your new team, click the Save button.

The team is now created.

NOTE Agents and supervisors may need to logout and log back in to retrieve their team memberships. Agents should do this from the Agent application while supervisors should use the portal.

Edit a Team

To edit a team, navigate to the Buzzeasy Portal > General > Teams and select the team you wish to edit.

You may change the name of the team, assign or unassign queues, add or remove members.

TIP

Portal's built in intelligence will detect if your assigned queues have been deleted by your administrator. You will be presented with a clean-up option. On click, it will automatically unassign removed queues from your team.

Changes will be retrieved when agents and supervisors login to their applications.

You may also delete a team if it’s no longer needed. This action is irreversible. While you may create a new identical team, the Buzzeasy unique identifier will be different, as such, reporting may be affected.

Roles

Discover the purpose of roles and how to create, edit and delete roles in this section of the guide.

Roles are collections of permissions to read, update, create and delete the business entities found in the portal.

Roles are assembled and then assigned to users and agents to enable them to complete their tasks.

Create a Role

Locate the Roles section in the Portal > General section.

The Roles blade opens. All roles are listed in the roles blade.

Locate and click the + Create button at the top of the Roles blade.

A new blade opens to the right of the Roles blade. Refer to this as the Role's details blade.

You must enter a name for the new role. This is a required field.

Set the business entities and the permission type.

For each of these business entities the permissions Read, Update, Create, and Delete may be conferred.

Certain business entities and permissions automatically grant other business entities permissions.

Delete permission confers create, update and read. See the permissions section below for more details.

Choose the combination of entities and permissions that will comprise your role.

Select Save in the role's detail blade to save the role.

Available Entities

Agent

Agents may log into the Buzzeasy Agent application.

Permissions on this entity allow a user to View, Edit, Create and Delete agents.

It grants View, Edit, Create, and Delete permissions automatically for Users as well as the Teams section.

Announcement

Announcements are heard by customers in voice calls. Queue position, Callback offer, and Music on hold announcements may be configured.

Permissions on this entity allow a user to view, edit, create and delete announcements.

Campaign

Campaigns enable the automated calling of customers.

Campaigns may be of the callback type, where customers requesting callback are dialed automatically.

Permissions on this entity allow a user to view, edit, create and delete Campaigns.

Email

This entity enables a user to access Email channels, workflows, and templates. Channels and templates can be created here. Permission to this entity allows a user to View, Update, Create and Delete Channels, workflows, and Email templates.

Facebook

This entity enables a user to access Facebook channels, chat workflows and chat queue treatments.

Automatically grants workflow and queue treatment permissions.

Instagram

This entity enables a user to access Instagram channels, chat workflows and chat queue treatments.

Automatically grants workflow and queue treatment permissions.

Integration

This entity enables a user to access service hooks. A service hook gives the developer-level user the ability to push notifications to a URL for integration purposes.

For example, a service hook can be created that can operate on an instance of a call being abandoned. When the call is abandoned, a notification can be sent to the URL of a web service configured in the service hook, with information about the call.

Permissions on this entity allow a user to view, edit, create and delete service hooks.

In addition to that, it also grants permissions to the Chat Bots as well as the QnA section which allows development teams to bring their bot to the platform.

Reports

This entity enables a user to access the Reports. Reports provide a vast amount of key performance indicators for supervisors and team leaders to empower them to better manage their contact center activities.

Permission to this entity allows a user to View & edit reports and their thresholds, as well as create and delete agents or their settings.

Agent-View will be enabled when this entity is enabled as well.

Role

Roles are collections of permissions and are the subject of this article.

Permissions on this entity allow a user to view, edit, create and delete Roles.

User

Users may log into Buzzeasy. Whilst all agents are users, not all users are agents. An administrative or developer user could be created that is not an agent and has no access to the Buzzeasy Agent application.

Permissions on this entity allow a user to view, edit, create and delete.

Permissions to this entity automatically grant Roles-View permissions.

Viber

Users with this permission may create, view, edit, and delete Viber channels, chat workflows and chat queue treatments.

Automatically grants workflow and queue treatment permissions.

Voice

Users with permission to this entity may create, view, edit, and delete Voice channels, chat voice workflows, and voice queue treatments.

Automatically grants workflow and queue treatment permissions.

Webchat

Users with permission to this entity can view, edit, customize, create, and delete Webchat channels, workflows, and queue treatments.

Automatically grants workflow and queue treatment permissions.

Whatsapp

Users with permission to this entity can view, edit, create and delete Whatsapp channels, workflows, and queue treatments.

Automatically grants workflow and queue treatment permissions.

Available Permissions

Read

The read permission enables a user or agent to view the entities for which this permission is enabled.

For example, an agent with read permission (through a role assignment) on the Agent entity, can view other agents.

Update

The update permission enables a user or agent to edit the entities for which this permission is enabled. Once an entity is edited and saved that entity is updated from its previous state.

Update permission confers read permission too because the entity must be viewed to be edited and updated.

For example, a user with update permission (through a role assignment) on the Agent entity may alter the details of an agent.

Create

The create permission enables a user or agent to create the entities this permission is enabled for.

The Create permission confers update and read permissions too.

For example, a user with create permission (through a role assignment) on the Agent entity may create an agent.

Delete

The create Delete permission enables a user or agent to delete the entities this permission is enabled for.

Delete permission confers create, update and read permissions too.

For example, a user with delete permission (through a role assignment) on the Agent entity may delete agents.

Edit a Role

Select Roles in the sidebar menu of the portal.

The Roles blade opens. All roles are listed in the roles blade.

Select the role you wish to edit. The role's detail blade opens.

Edit the permissions that comprise the role.

Optionally, edit the role's name.

For a detailed explanation of the individual fields see the Create a role section above.

Select Save in the role's detail blade to save the role.

Delete a Role

Select Roles in the sidebar menu of the portal.

The Roles blade opens. All roles are listed in the roles blade.

Select the role you wish to delete. The role's detail blade opens.

Select Delete in the role's detail blade.

Sample Roles

The following sample roles illustrate how the minimum permissions might be applied to allow a specific user to complete their work.

Campaign Administrator

Assume a requirement to create a role that will be applied to a user who will create and manage campaigns.

The role allows the administrator to view everything in the portal, but only create, update, and delete campaigns.

A role similar to the one described here would fulfil this requirement.

View Only Role

Assume a requirement to create a role that allows portal objects to be viewed but not edited, created, or deleted. The requirement excludes viewing developer-level Integration entities.

A role like the one described here would fulfil this requirement.

Email Channel Configuration

Registering the Buzzeasy Email Application

Register the app to enable the Buzzeasy service to access the Microsoft Tenant and get access to the mailboxes of the user you specify.

Navigate to Emails > Channels > Register App. You require IT Admin privileges to complete this action. You will only be required to do this once, to enable access the mailboxes you will be using for your new email channels.

If you're a supervisor, you can copy the URL and pass it over to your IT department to register the application for you.

Once registered, Buzzeasy will be able to download email addresses on demand from all mailboxes, meaning it will read from whichever mailbox you use while creating an Email Channel however, we recommend you scope the access of the Buzzeasy application to the mailbox you are going to use for your Channels in order to avoid any privacy concerns your AAD users may have. To scope the application permission to a specific mailbox, please follow this documentation provided by Microsoft.

Best Practice for Buzzeasy Email App registration

In order to avoid IT overhead when adding more email channels while also not allowing Buzzeasy to read from all mailboxes, we provide a privacy-focused best practice.

First, you need to create a mail-enabled security group in Exchange. Learn how.

Next, add the mailboxes that are going to be used as Buzzeasy Email Channels to this newly created group.

Lastly, create a New-ApplicationAccessPolicy to allow Buzzeasy to read/write emails on behalf of the accounts added to the group.

- You will require an AppID, to obtain this, navigate to your Azure Portal > Azure Active Directory > Enterprise Applications and search for Buzzeasy Email Integration application. Copy the Application ID and save it in a Notepad.
- You will require the PolicyScopeGroupId: This will be the new mail-enabled security group you just created.
- AccessRight: RestrictAccess

Buzzeasy is now restricted to only read/write emails on behalf of the mailboxes you added to the group! Should you need more email channels in Buzzeasy, simply add your mailbox to this group and proceed with channel creation.

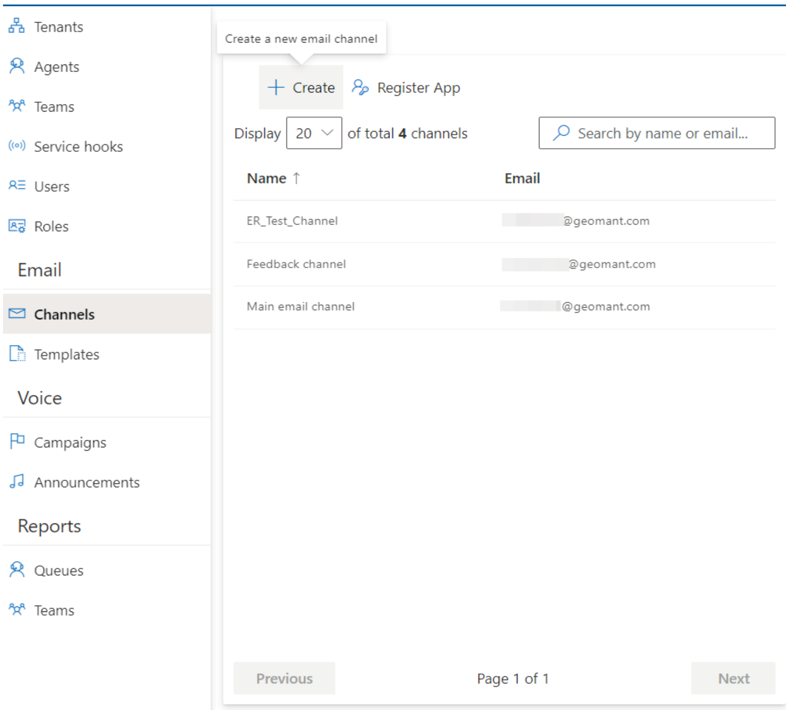
Configure Channels

Email Channels are configured through Buzzeasy's Beta Portal.

NOTE An IT administrator must click the Register App button before provisioning the first Buzzeasy Email Channel.

Create an Email Channel

- Provided you are a Tenant Administrator or Email business entity has been assigned to your role through Role-Base Access Control, select Channels from the Email heading in the portal sidebar.
- Select the Create button.

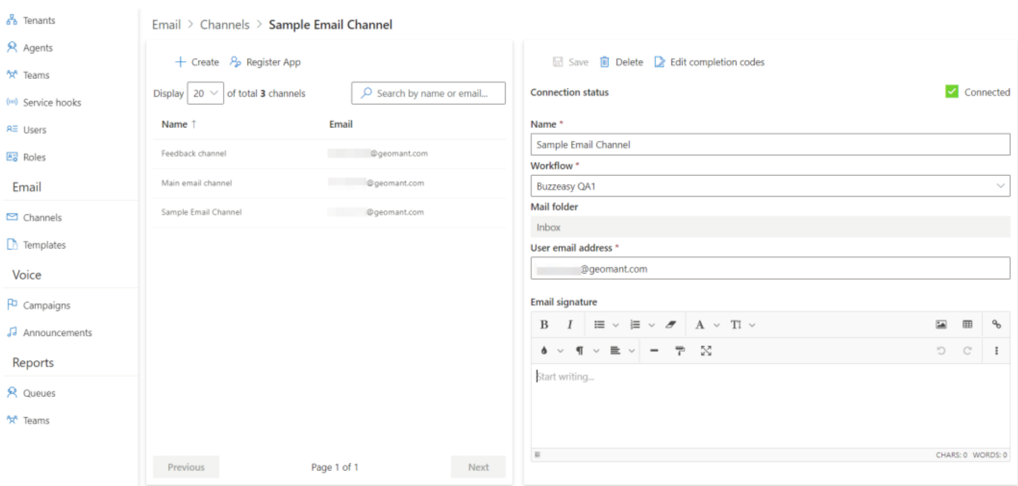


- Enter a name for the channel.
- Enter an email address for the channel. You must use a valid email address.
- Use the drop-down control to select a Workflow for the channel.

Optionally, you may create an email signature to use with your channel. See the step Create an Email Signature, below for instructions to complete this step.

- Select Save.

The channel is created. Note that a green check mark indicates the channel is operational and the connection to your Azure Active directory is active for the mailbox provided.



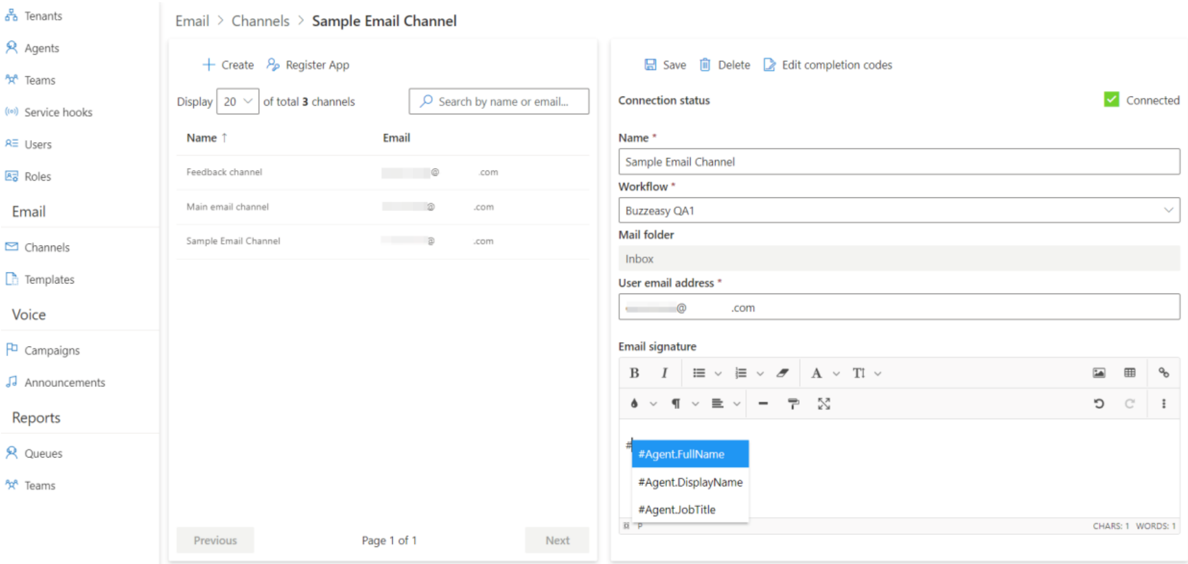
Create an Email Signature

An email signature on your channel can be used to poulate the Agent Name, the Agent's Display Name and the Agent's job title as configured in the Agents section of the portal.

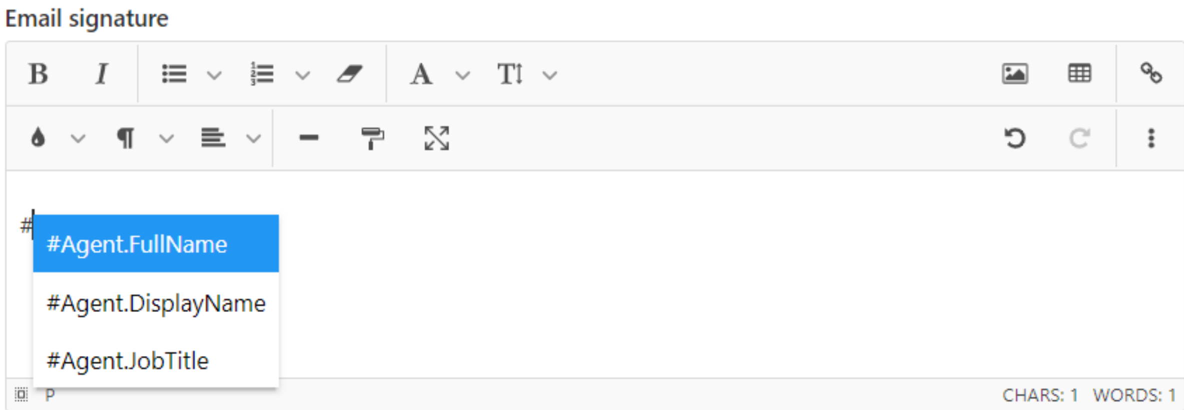
Discover how to edit an agent here, so that you can configure the Name, Display Name, or Job Title that appear in the signature.

Enter and Format Signature Text

- Insert a field into the email signature using the pound or hash character #, the available fields: Name, Display Name, and Job Title appear as you type.

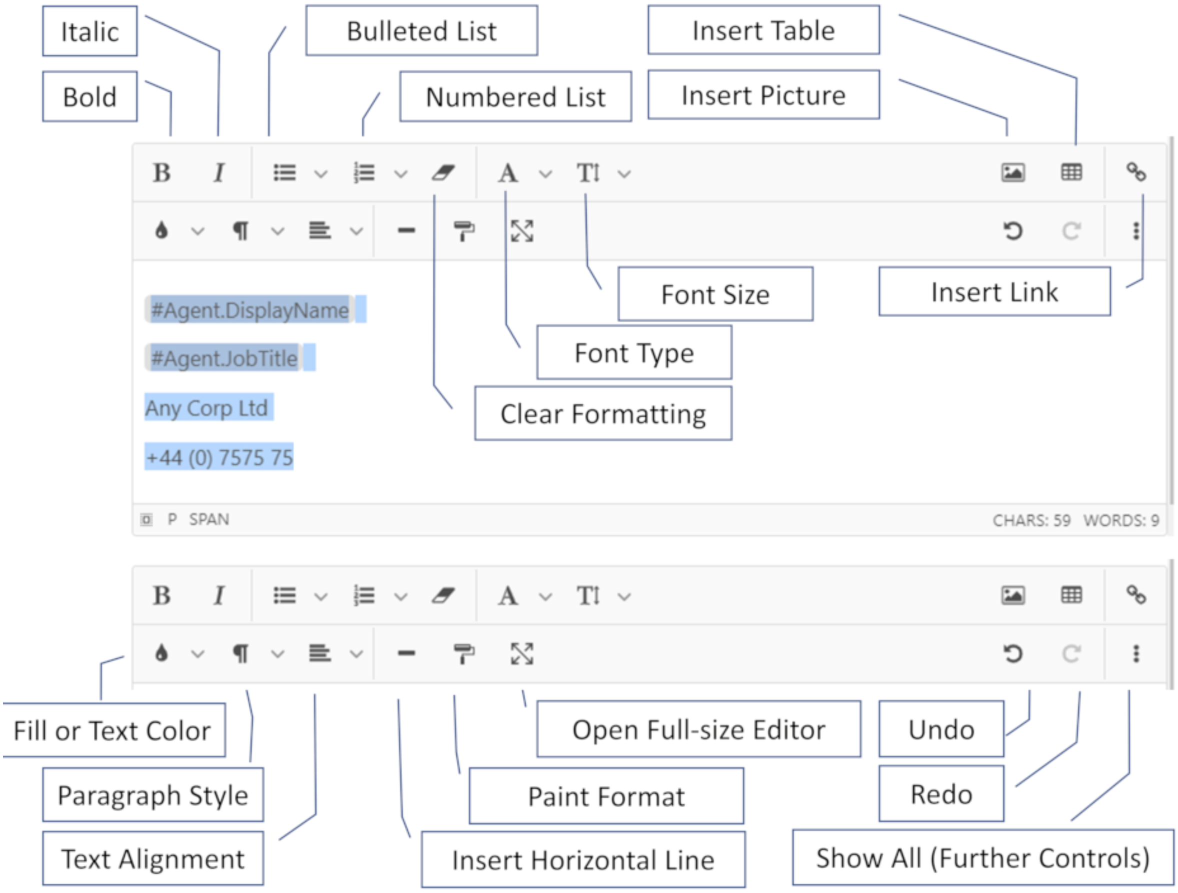


- Select the field you require.



- Type plain text into the signature for generic text that will display on all signatures. For instance type a company name and department.
- Select text then use the formatting controls to modify the text in your signature.

The formatting controls enabling you to format text are intuitive to use. A full guide to each control appears below.

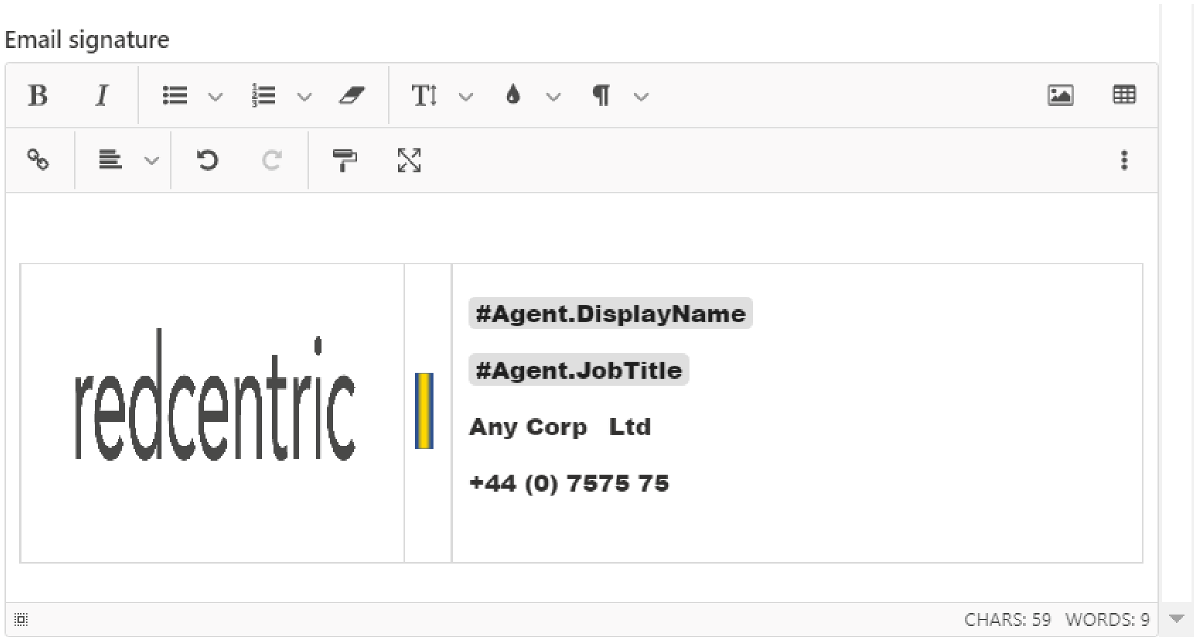


Align Text and Images

- Insert a table into your signature.

- Use the Insert Table icon to insert a Table.

- Use the table to align text and images. Insert text and images in separate cells.



Configure Templates

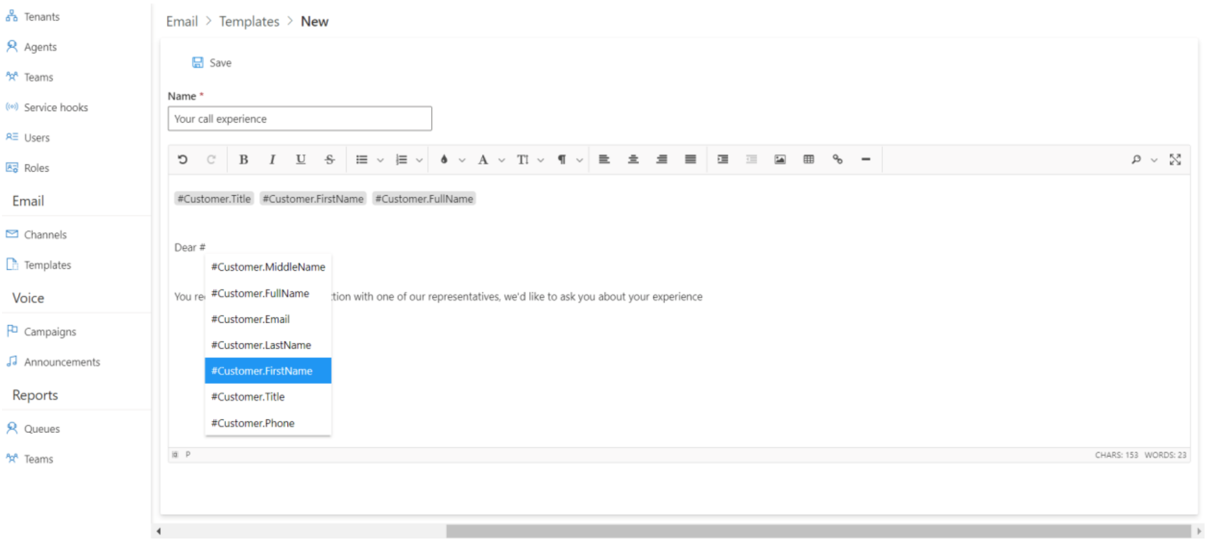
Configure an email template to send a standard message to multiple customers. The template can be populated by fields of customer information. Examples include the customer's name or job title. By including these fields you can create personalized communications with customers.

Where to Configure the Email Channel

Configure the email template here: https://betaportal.buzzeasy.com/email/templates.

Create an Email Template

- Select Templates from the Email heading in the portal sidebar.
- Select the Create button.



- Enter a name for the template.
- Select Save.
- Enter the text and customer fields to compose your template text.
- Select Save.

Edit the Template

Type the pound or hash character # to display the customer fields.

- Select the field you require.
- Type plain text into the template for generic text that will display on all templates. For instance type a greeting and the purpose of the message.
- Select text then use the formatting controls to modify the text in your signature.

The formatting controls enabling you to format text are intuitive to use.

Email Workflow

Email workflows can be found by navigating to Email > Workflows using the portal.

Email workflow designer has been built based on the current usage of Email, the look and feel is consistent with any other media group, such as the Workflow designer for Chat.

Workflow generic properties

Workflow Name

The workflow name is a mandatory parameter as this will be used as a selection for a particular channel.

We provide a set of guidelines for DOs and DONTs when naming your workflows.

DOs:

- Mention the media type in the name of your workflow (eg. Facebook - Page name)
- Mention the business flow your workflow satisfies (eg. Webchat - Support page)
- Create backup identical workflows to test changes on a test workflow before applying them to your customer-facing flows.
- Create different flows for the same use case with different customer-facing customizations (eg. for messages).

DONTs:

- Do not reference "Workflow" in the name, it simply takes space and provides no valuable information to you
- Do not use generic names such as "Test flow" "main flow" "main channel" "primary flow" "New workflow" etc as this does not provide any real information to anyone within your organization.

Idle timeout

Idle timeout, by default, is set to 1440 minutes (24 hours). If there is no activity for the specified time, the system will automatically close down the conversation.

For example, if the workflow idle timeout is set to 10 minutes and the agent or the customer does not send any messages, the system will automatically close the conversation after the 10 minutes have passed.

The maximum value for the idle timeout parameter is 10080 (168 hours, 7 days). The minimum value is 10 minutes.

When creating a workflow, mind the idle timeout!

Workflow designer

Once you provided the generic properties for a workflow and you clicked Create, the user interface will automatically move you into the workflow designer to begin customizing your flow.

Node types

Start Here

Start here is the default node type. The purpose of this node is to highlight the starting point of your workflow.

Click the black dot and drag it in any direction to open the context menu with other available nodes that you can select to build up your workflow.

Customer intent evaluator

Use this node to take decisions based on the subject line, the content or both, for routing purposes. Buzzeasy will scan the subject or the content of the email, if it contains the keyword specified, then it is considered a match.

Keywords are split into groups. The groups will represent the outputs of the node itself. You may specify multiple keywords, on different lines, for a single group, but you may specify up to 10 groups and 50 keywords.

We provide the option to download a pre-formatted CSV template. Here is where you type your keywords and the group they belong to. Phrases are supported, however, when scanning the content or the subject of the email, this phrase must be an exact match. For example, if your keyword is "windows 11 upgrade" it will not match "upgrade to windows 11" as it is not an exact match.

If multiple groups are matched in a content, Buzzeasy will use the first match for the node's output. You may create multiple evaluator nodes to refine your workflows.

When Subject and Content options are used together for matching with a single CSV, subject is evaluated first.

CSV format must not contain question marks, signs, brackets and any other punctuation. Empty keyword groups or key phrases are not allowed. You may not enter the same key phrase twice and you may not assign the same key phrase for two different groups.

While the node will allow you to upload invalid CSVs, saving is not allowed. This is to present the invalid information and provide the chance to correct the error in a more visual manner. Error messages are provided whenever an invalid CSV is uploaded as well.

Queue

Allows you to route conversations to agents. When you create a queue, you must select the routing mechanism for it. It can be automatic or manual. You may not change this later on for a given queue, but you may delete the queue and recreate it with the new routing mechanism.

Manual queues allow skilled agents to pick items by themselves while automatic uses our intelligent routing mechanism to find the first skilled available agent.

Parameters:

- Max queue size. Specify the maximum number of parallel conversations allowed in the queue.
- Attribute requirements. Specify the attribute, also known as skill, and value required to route conversations from this queue to agents.

Outputs:

- AgentDisconnect. The agent closed the task. For email, this property should be set to End, however, we added it for future integrations.
- Size Limit Reached. Specify what should happen when the Max queue size limit has been reached.
- No Agent logged in. Specify what should happen when no agent is logged in across the tenant.
- No Staffed agent logged in. Specify what should happen when agents with no skills or work-item thresholds are not logged in.

Before a conversation enters the queue node, the following outputs are evaluated, in this order:

1. No agent logged in. System checks if there are any agents logged in across the tenant, if yes, proceed to the next check, if not, use the output flow.
2. No staffed agent logged in. System checks if the logged-in agents are skilled and have the appropriate work-item thresholds, if yes, proceed to the next check, if not, use the output flow.
3. Max queue size. System checks if the conversation would go above the specified limit, if yes, use the output flow, if not, the conversation enters the queue.

Set data

Set Data node allows you to set workflow data and re-use it later on either in a Switch node. Useful for future integrations.

Switch

In workflow designer 1.0, conditions were used to take actions based on customer data. We introduced a dedicated node for that which we now call Switch.

You can specify up to 5 workflow conditions. Each condition will have its output. Besides that, the default output is provided.

You may use this node paired with the Set Data node.

Outputs:

- Each property has its output. Decide what happens based on these properties.
- Default: Acts as a failsafe, decide what happens if no condition is met.

Using the designer toolbar

The designer toolbar is located at the bottom left corner of the screen. Currently, the following tools are available:

Plus + sign will zoom in to the current focus area. The focus area is located in the centre of the screen. The same result can be achieved by using your mouse's scroll wheel.

Minus - sign will zoom out from the current focus area. The focus area is located in the centre of the screen. The same result can be achieved by using your mouse's scroll wheel.

The fit view button is the third option in the toolbar, this will automatically adjust the zoom to fit all nodes on the screen. This is useful to visualize the entire flow. The fit view will use the amount of screen available to you, this varies depending on your monitor size, resolution, accessibility options enabled, or browser zoom.

The toggle interactivity button will disable editing nodes. This is useful to scroll through the flow without accidentally editing any of the nodes or moving them around. You can move around the design of your workflow by clicking anywhere on the screen, holding the click, and moving your mouse around. Toggle interactivity to prevent accidentally moving nodes around or clicking selecting unwanted properties in your flow.

The validation error icon will inform you that you have 1 or more validation errors in your flow. The designer automatically validates your workflow as you create it, click the triangle to navigate to the first navigation error encounter. This will automatically adjust the zoom and focus the problematic node.

We are excited to receive your feedback and creative ideas for additional designer tools!

Saving a workflow

Saving for the new workflow designer is available at any given time, unless validation errors occur, in which case the save button is disabled.

Validations errors are highlighted by a Warning triangle on the header of the improperly configured node. In addition, designer tools located at the bottom left corner of the screen show the same triangle. Click on it to navigate to the faulty node.

The user interface highlights mandatory parameters through a red * or a red circle around the mandatory outputs. Additionally, hovering over the triangle will show a tooltip informing you about what is not correctly configured.

We will introduce more quality of life changes to the saving mechanism informing you about any unsaved changes before navigating away.

Edit workflow generic properties

For existing workflows, you may edit their generic properties by clicking a workflow in the list, then using the pen icon on the top left corner of the screen. A modal window, commonly known as a popup, will be shown. Modify your workflow's name or idle timeout, then click OK. Please note that the OK button is not a replacement for Save. You will need to save your workflow by using the dedicated icon located at the top left corner afterward.

Other designer features

Cloning a workflow

To clone a workflow, simply click the Clone button and provide a new name for the cloned workflow. All nodes will be carried over and you will be redirected to the cloned workflow automatically so ensure all changes in the current workflow are saved before cloning.

Cloning a node

To clone a node, simply click the clone button for the node you wish to clone. All properties of the node will be carried over to the new node, however the input and outputs are not set.

You may clone a node as many times as you wish, but clicking the clone button multiple times for the same node will result in the clones placed on top of each other.

Multi-select nodes

To select multiple nodes, hold down the shift key on your keyboard, then, using your mouse, drag a square over the nodes you wish to select.

You may drag these nodes as well or press the backspace key to delete them.

Deep link nodes

You may copy the URL of a node by clicking the 3 dots menu, then copy link. Paste this link to your co-workers and colleagues, when click, this will redirect the user to the node you linked to. Please note that the user clicking the link must have access to the tenant as well as the proper role-based access control to view workflows.

Search for a node

When designing large workflows it can be difficult to match the output and inputs of nodes. The workflow designer provides a tool to help with that. When selecting an output, a search field is presented, you may search for an existing node in your workflow using it. Selecting a node from the search results will automatically link te output to the input of the searched node.

Voice

Announcements

Discover how to configure the announcement types that a customer hears during voice calls.

The supported announcement types are:

1. Queue position
2. Callback offer
3. Hold music

Audio Files

Use audio files to customize announcements. Upload single audio files or multiple audio files zipped into a zip file.

All audio files used should have these properties:

- Mono
- 8 kHz / 8000Hz bit rate
- 8 bit
- μ-law / ALAW encoding
- lowercase filename
- .wav file format

depending on their use, the files should have specific filenames. These are detailed below.

Queue position

These announcements inform the customer about their position in a voice call queue, before they are routed to an agent.

You may use a single file or a bundle of files.

Prepare a zip file of one audio file or a bundle of audio files.

For one file, the filename should be:

- default.wav

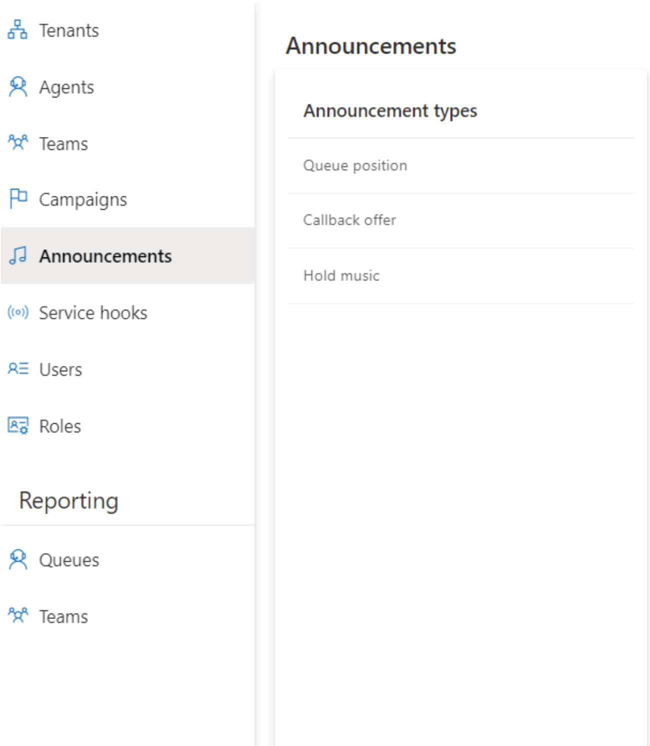
For a bundle of files, the file names should be:

- default.wav
- 1.wav
- 2.wav
- 3.wav
- Extend this file naming pattern with 4.wav, 5.wav etc. for all required files.

Setup Queue Position announcements

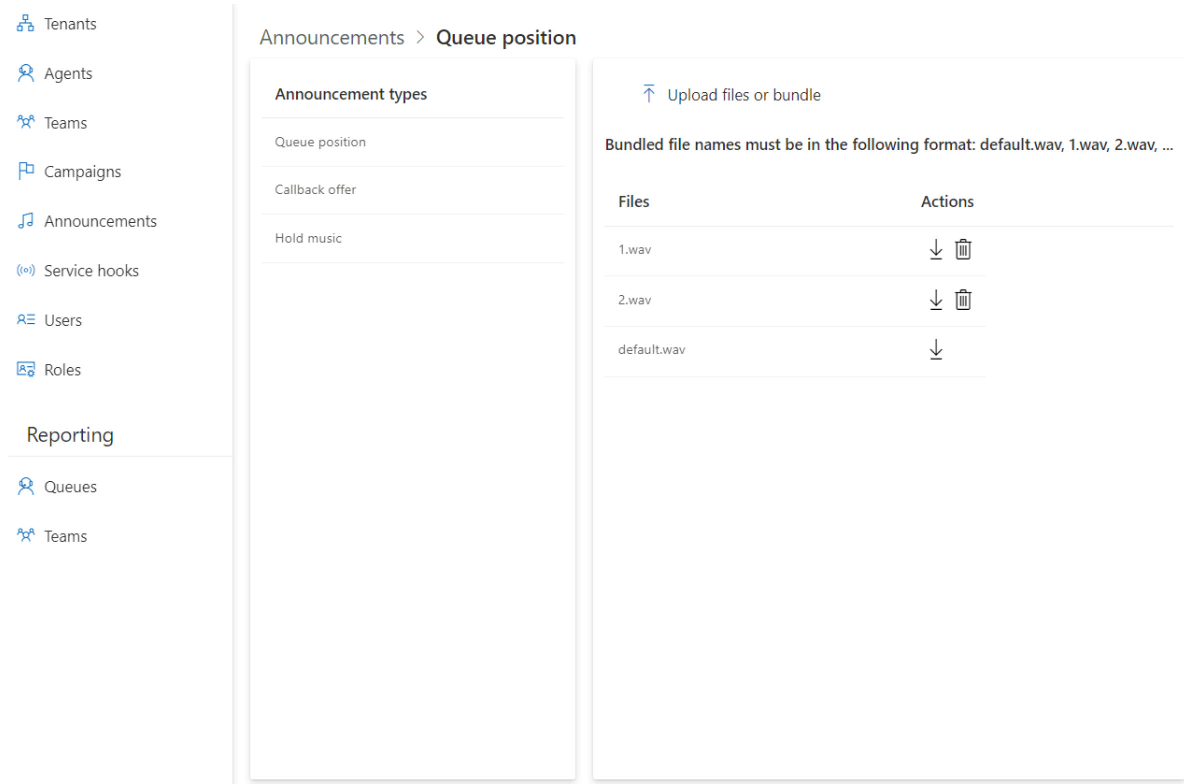
Select Announcements from the portal sidebar.

The announcements blade open



Select Queue position from the announcements blade.

The Queue position blade opens.



Select Upload files or bundle.

Navigate to your zipped wav file, or files, and select Open.

The files appear, listed in the blade, with accompanying Actions icons:

- Download icon, an arrow pointing downwards
- Delete icon, a trash symbol.

Any files of the same name previously uploaded are overwritten.

Edit Delete Queue Position Files

Optionally select the download icon to download the file, and confirm its contents.

Optionally select the delete icon to remove the file. The file is now unavailable.

Callback Offer

These announcements offer a callback to the customer from an agent, as an alternative to waiting in the queue.

Prepare one zip file comprised of two audio files. The file names must be offer.wav and confirmation.wav.

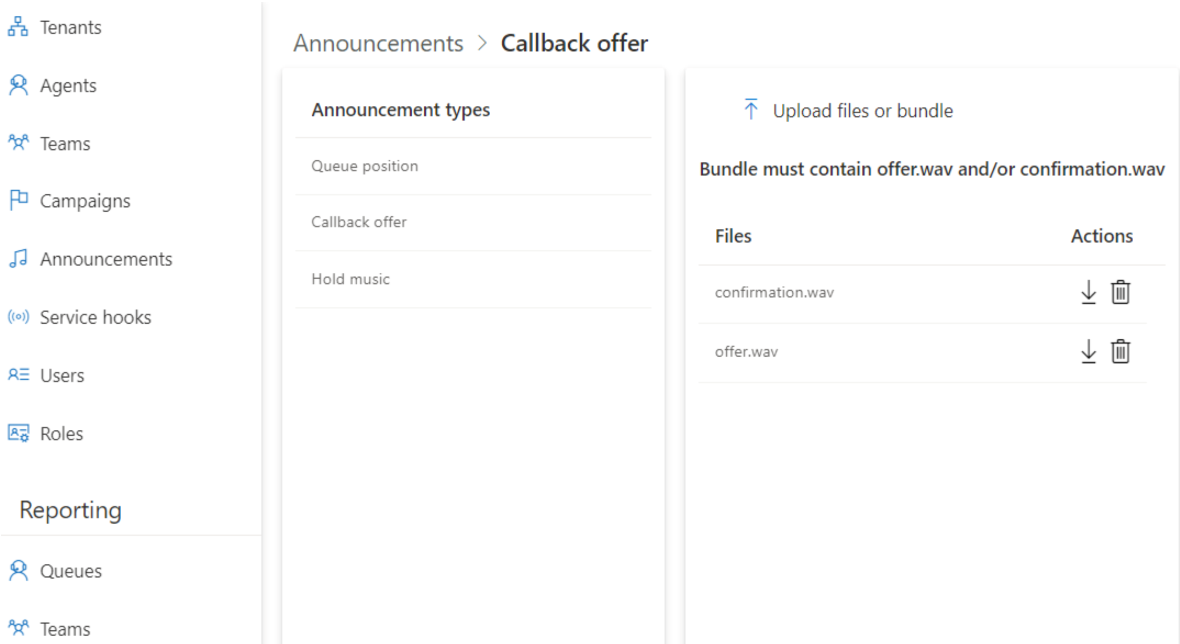
Setup Callback Offer Announcements

Select Announcements from the portal sidebar.

The announcements blade opens.

Select Callback offer from the announcements blade.

The Callback blade opens.



Select Upload files or bundle.

Navigate to your zipped wav file or files and select Open.

The files appear, listed in the blade, with accompanying download icon, an arrow pointing downwards, and delete icon, a trash symbol.

Any files of the same name previously uploaded are overwritten.

Edit Delete Callback Files

Optionally select the download icon to download the file, and confirm its contents.

Optionally select the delete icon to remove the file. The file is now unavailable.

Hold music

Use this feature to customize the music, or recorded message, a customer hears when they are on hold in a voice call with an agent.

Prepare a zip file comprised of one audio file. The filename must be hold.wav

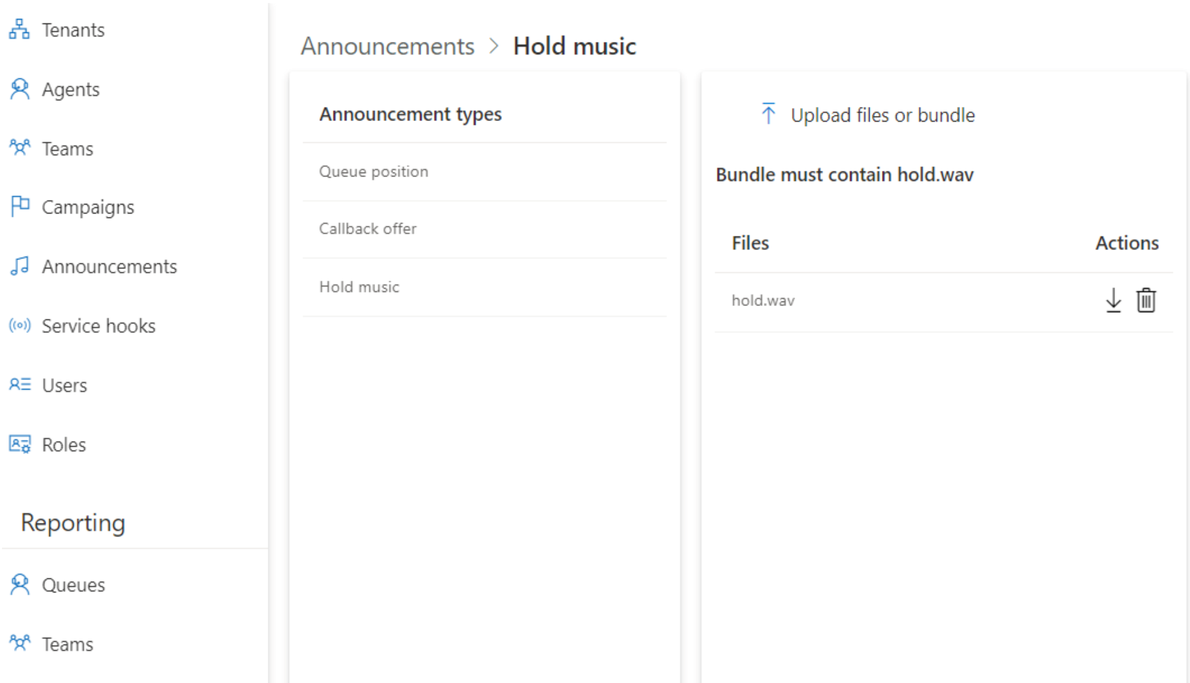
Setup Hold Music Announcements

Select Announcements from the portal sidebar.

The announcements blade opens.

Select Hold music from the announcements blade.

The Hold music blade opens.



Select Upload files or bundle.

Navigate to your zipped wav file and select Open.

The file appears, listed in the blade, with an accompanying download icon, an arrow pointing downwards, and delete icon, a trash symbol.

Any file of the same name, previously uploaded, are overwritten.

Edit Delete Hold Music Files

Optionally select the download icon to download the file, and confirm its contents.

Optionally select the delete icon to remove the file. The file is now unavailable.

Campaigns

Campaigns enable the automated calling of customers.

Campaigns may be of the callback type, where customers requesting callback are dialled automatically.

Campaigns may be of the preview type, where numerous customers are dialled in sequence. Campaigns are set up to contact customers, for marketing purposes, or for canvassing opinion.

Campaigns require a list of customers to call. Each campaign has its own template for the layout of the list of list of customer records to be called. Refer to this template as the Campaign Records Template.

The template should be setup as required, downloaded from the portal, populated with records, then uploaded back to the Buzzeasy portal. This provides the customer records to call in the campaign.

The campaign will only run in the Campaign opening hours, so these must be setup too. With records uploaded and the opening hours set, the campaign may be started.

Setup a Campaign

The steps required to setup the campaign form headings within the campaigns topic.

- Create a new campaign name
- Specify a channel
- Setup the campaign records template
- Populate the campaign records
- Upload the campaign records
- Setup campaign opening hours
- Start the campaign

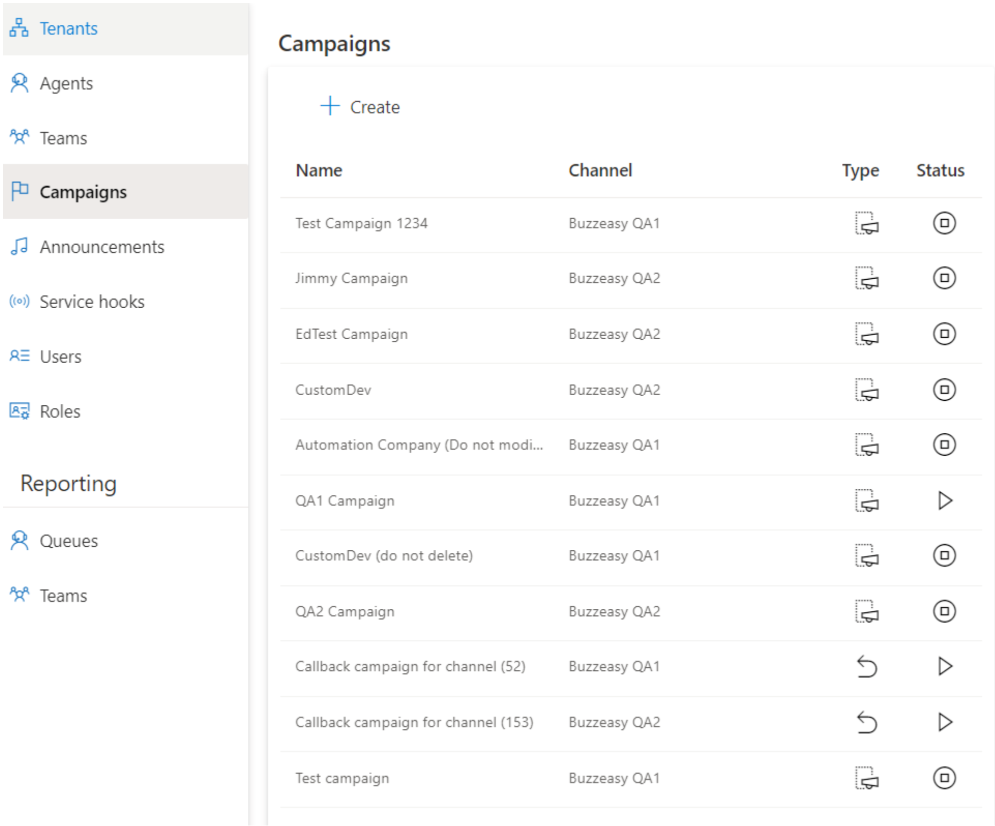
You will also need to learn how to:

- Stop a campaign
- Edit an existing campaign
- Delete a campaign

Create a Campaign

Select Campaigns from the portal sidebar.

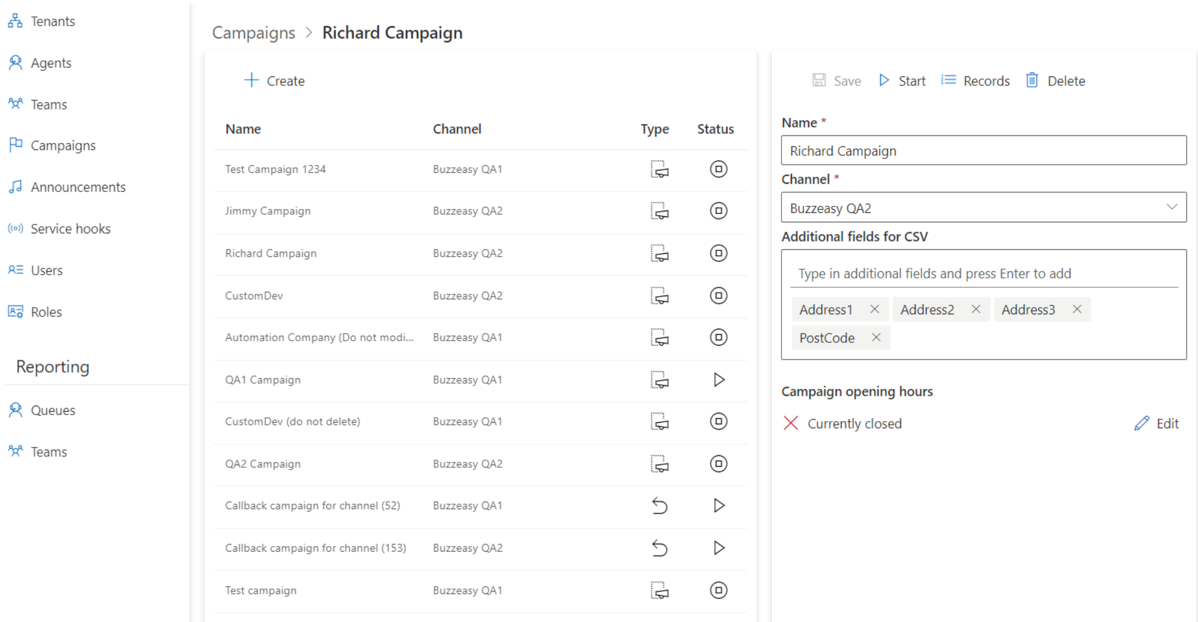
The Campaigns blade opens.



Locate the + Create button at the top of the Campaigns blade.

Select the + Create button to create a new campaign.

A new blade opens to the right of the Campaigns blade. Refer to this as the Campaign's detail blade.



Supply details for the campaign using the steps below.

Optionally you may setup the whole campaign, or provide just the required name and channel, then save the campaign and add further details by editing the campaign at a later time.

Locate the Save button at the top of the Campaign's detail blade.

Select the Save button to save the campaign.

Enter a Campaign Name

Enter a name for the campaign in the Name field of the Campaign's detail blade.

Select Save from the top of the Campaign's detail blade to save the change.

Enter a Channel

Channels contain information about the communication medium, opening hours, holidays, the workflow and configurations for chat, messaging and voice.

Use the control on the Channel field of the Campaign's detail blade, to select a channel.

Select Save from the top of the Campaign's detail blade to save the change.

Campaign Records and the Campaign Records Template

Campaign Records

The Campaign records are the entries on the list of customers to be called. The campaign records are customer details that include the phone numbers to be called.

Add campaign records by uploading a text file consisting of rows of customer details to the campaign. The file of customer details must have a specific structure and be in Comma-separated Values (CSV) file format. The structure of the customer details text file is determined in the Campaign Records Template.

Campaign Records Template

The campaign records template has a specific structure. The first three columns, or fields, must be:

- CustomerPhone
- CustomerFirstName
- CustomerLastName

You may add further fields, specific to each campaign's requirements. Find the steps to add extra fields in the Setup the Campaign Records Template section below.

Download the empty list of records, setup with the required first three fields and any custom fields to form the Campaign records template. Find the steps to download the template in the Download Campaign Records Template below.

The template must be populated with records, to form a customer records file. Find the steps to populate the file in the Populate Campaign Records section below.

The customer records file is then uploaded, to the campaign and the campaign may be started. Find the steps to upload the customer records in the Upload Campaign Records section below.

Setup the Campaign Records Template

Locate the Additional fields for CSV text box in the Campaign's detail blade.

The fields of the Campaign Records Template, may be added or removed in the Additional Fields for CSV field.

Add a field; type a new field name in the control and key enter.

Remove a field; select the cross icon at the right of the field name.

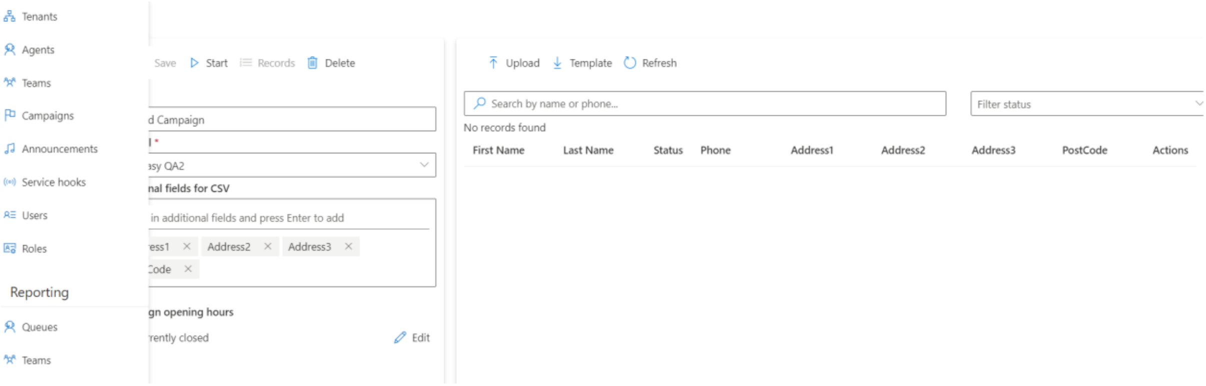
Select Save from the top of the Campaign's detail blade to save the change.

Download Campaign Records Template

Locate the Records button at the top of the Campaign's detail blade.

Select the Records button.

The Campaign records open in a new blade and the window scrolls to the right. Refer to this as the Campaign records blade.



Locate the Template button at the top of the Campaign records blade.

Select the Template button, the Campaign records template downloads to your default download location.

Populate Campaign Records Manually

Locate the downloaded file and open it in a text editor, or in a spreadsheet application.

Edit the file to add customer records.

Save the file. Ensure you choose to save the file in CSV format.

Note the location of the saved Customer records file.

You will need to navigate to the file to upload the customer records to the campaign.

Populate Campaign Records with a Database or CRM System

It is possible to generate a file of customer records suitable to upload to the campaign with a database or, if supported, a Customer Relationship Management or CRM system.

You will need to refer to your database or CRM administrator for this step. The database or CRM administrator will need the campaign records template, for the structure of a suitable file.

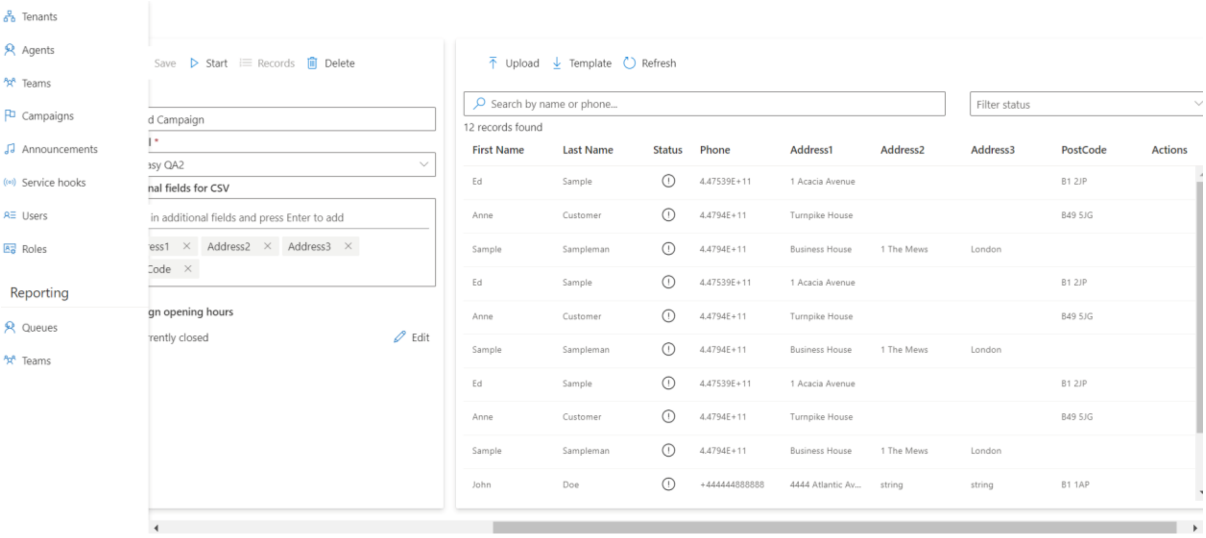
Once an administrator provides a suitable text file of customer records, note its location.

You will need to navigate to the file to upload the customer records to the campaign.

Upload Campaign Records

Locate the Records button at the top of the Campaign's detail blade.

Select the Records button. The Campaign records open in a new blade. Refer to this as the Campaign records blade.



Locate the Upload button at the top of the Campaign records blade.

Select the Upload button

Browse for the Campaign records file.

Select the Campaign records file then select Open.

The campaign records are uploaded. Any existing records are retained. The new Campaign records are appended to the campaign records list.

Start a Campaign

Select Campaigns from the portal sidebar.

The Campaigns blade opens. All campaigns are listed.

Select the campaign you wish to start.

A blade opens to the right of the Campaigns blade. Refer to this as the Campaign's detail blade.

Locate the Start button at the top of the Campaign's detail blade.

The Start button is only visible on a stopped campaign.

Select Start to start the campaign.

The campaign starts. The Start button changes to a Stop button.

Stop a Campaign

Select Campaigns from the portal sidebar.

The Campaigns blade opens. All campaigns are listed.

Select the campaign you wish to delete.

A blade opens to the right of the Campaigns blade. Refer to this as the Campaign's detail blade.

Locate the Stop button at the top of the Campaign's detail blade.

The Stop button is only visible on a started campaign.

Select Stop to stop the campaign.

The campaign stops. The stop button changes to a start button.

Edit a Campaign

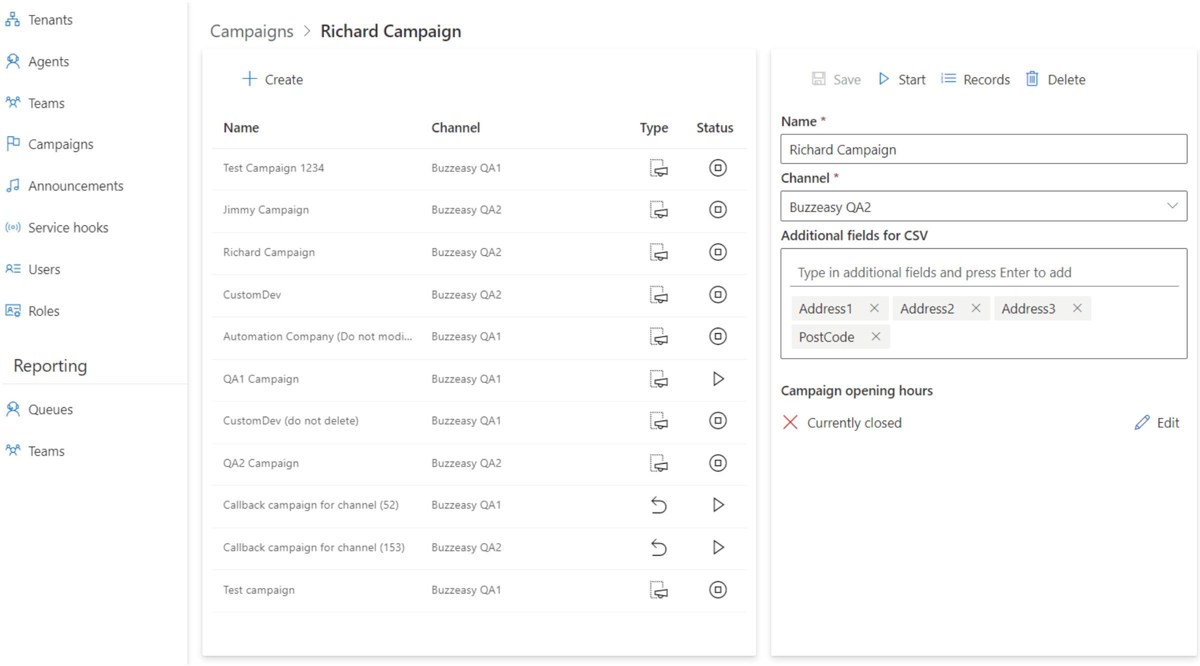
A campaign must be stopped in order to edit it.

Select Campaigns from the portal sidebar.

The Campaigns blade opens. All campaigns are listed.

Select the campaign you wish to edit.

A blade opens to the right of the Campaigns blade. Refer to this as the Campaign's detail blade.



You may edit: Name, Channel, Additional fields for CSV, and the Campaign opening hours.

Modify Name

Over-type the name in the Name field, if you wish to modify it.

Select Save from the top of the Campaign's detail blade to save the change.

Modify Channel

If required, modify the channel selection using the Channel drop-down control.

Select Save from the top of the Campaign's detail blade to save the change.

Modify the Campaign Records Template

The fields may be added or removed in the Additional Fields for CSV field.

Add a field; type a new field name in the control and key enter.

Remove a field; select the cross icon at the right of the field name.

Select Save from the top of the Campaign's detail blade to save the change.

For more information on the use of the template these fields refer to see the campaign records section of this article.

Campaign opening hours

Find the pencil icon and Edit button under the Campaign opening hours heading.

Select the Edit button to edit the hours of the day that the campaign is active.

The campaigns opening hours appear in a new blade to the right of the Campaign's detail blade. Refer to this as the Campaign's opening hours blade.

Edit the campaign opening hours in the Campaign's opening hours blade.

Select Save from the top of the Campaign's detail blade to save the change.

Delete a Campaign

Select Campaigns from the portal sidebar.

The Campaigns blade opens. All campaigns are listed.

Select the campaign you wish to delete.

A blade opens to the right of the Campaigns blade. Refer to this as the Campaign's detail blade.

Locate the Delete button at the top of the Campaign's detail blade.

Select Delete to delete the campaign.

Voice Queue Treatments

Queue treatments allow administrators and/or supervisors to provide an enhanced waiting in queue experience for their users. Buzzeasy leverages various functionalities empowering supervisors and administrators to create the best user experience for their customers.

Creating a Queue Treatment

Queue Treatments can be found in the Buzzeasy portal > Voice category > Queue treatments. While this option is available for chat as well, the functionalities are different.

To create your first Queue Treatment, navigate to the Buzzeasy Portal > Voice > Queue Treatments and click the Create button.

- A new modal, also known as popup, is displayed. You are required to provide a name, ensure the name is meaningful to help out your co-workers. We do not recommend using names such as "Queue treatment 1, main treatment" or any variation of that, try to describe what this queue treatment is for or what it does.
- You may also set a callback timeout, however this field is not mandatory, this will control the life span of callbacks waiting in a queue where this queue treatment is used.
- Click the Next button to navigate to the actual steps of your queue treatment. This is where you describe the experience.
- Provide a buffer duration to start things off with. Mobile carriers as well as the internet at times might be slower than Buzzeasy processing, which means that the audio might be cut-off for half a second or a second whenever Buzzeasy is significantly faster at processing than most carriers. We recommend adding a 1-2 seconds buffer to your queue treatments.
- Add at least one step to your queue treatment, you may choose any amount of steps for your queue treatment. Here are the available step types for you:
  - Announce step: Use this step to play a TTS or WAV file. Swap between the TTS mode and WAV mode by clicking the TTS dropdown. A wait will be automatically added to the step for you and the queue treatment estimation timeline. Specify how long should Buzzeasy spend here before moving onto the next step.
  - Set Music step: Use this step to start the music on hold for your queue treatments. This is the background music of your queue treatment, it will automatically repeat for as long as your queue treatment requires it to. You may use WAV files only here. Please specify for how long should Buzzeasy wait before moving onto the next step of your queue treatment.
  - Queue Position step: Use this step to announce the customer's position in the queue. This will use the WAV bundles already uploaded and available across the tenant. You may click the highlighted words to open up the bunndle used without navigating away from this section. Specify how long should Buzzeasy wait before moving onto the next step.
  - Offer callback step: Use this step to enable the callback offer while waiting in the queue. This will use the Callback bundle announcement. Click the highlighted keywords to open up the bundle without navigating away from this section.
- Enable the repeat treatment option. This allows you to repeat a queue treatment from a given step removing the need to duplicate your work. Simply specify the step you wish to repeat from.

Queue treatment timeline

The queue treatment section feature a timeline. This timeline provides a calculated estimation of when the events set in the queue treatment itself will be streamed to your customers.

While the timeline is an estimated value, please take into consideration that other factors may influence the timeline of events.

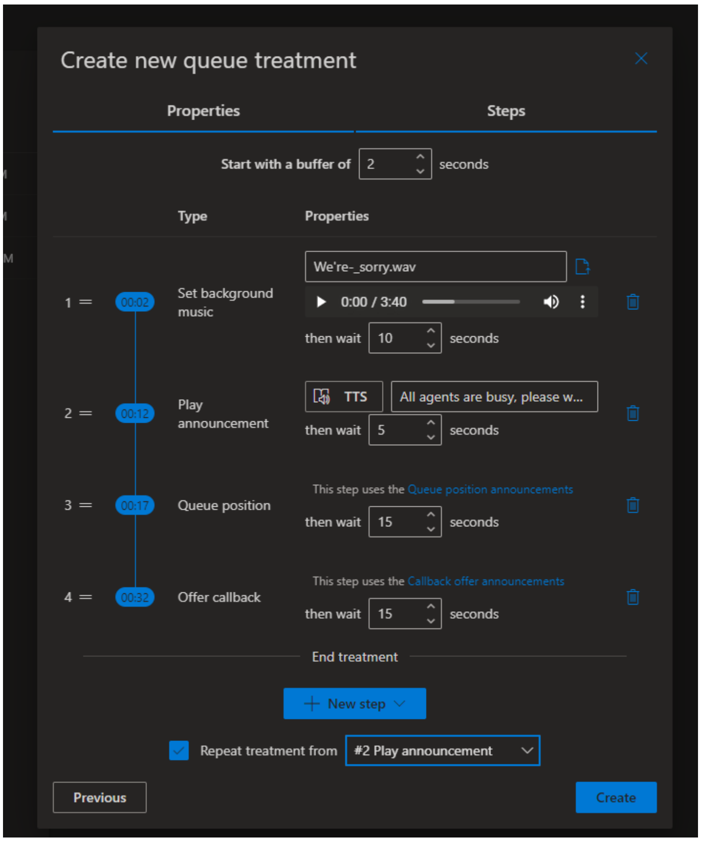
Using a queue treatment

Queue treatments can only be used in a Queue Node. You may use a single queue treatment for all of your queues but you may not assign multiple queue treatments to a single queue node.

Processing the queue treatment

Buzzeasy processes the steps in a queue treatment based on the order they are set. The steps are processed whenever a Call enters the queue by our Queue Management service. The service sends over this information to the voice server where it gets executed. Always be mindful about the length of your files as well as the duration you instruct the system to wait for before moving onto the next file, as the system does not wait for the current file to be played entirely before moving onto the next step, in order to reduce the amount of trimming and cutting of your wav files. You may control for how long a file is played by simply instructing the system to move onto the next step sooner than the file total duration.

Generic queue treatment example



In this example, we instruct the system to set a buffer delay of 2 seconds, then, to set the background music to "we're sorry.wav". We specify a 10 seconds wait time, because in this example we want, after 10 seconds to play a comfort message to the customer, which is the Play announcement step "all agents are busy, please wait".

After playing it, which takes approximatively 5 seconds, we want to stream the position in queue. This generally takes around 2 seconds, however, 15 seconds is specified to leave room for the background music to play. After that, we offer callback, which again, takes around 2 seconds with 13 other seconds for the background music to play.

The timeline shows an estimate of these durations, of course, you may increase the wait times as your files might be longer, or if you feel the need to play the background music for longer than 13-15 seconds between announcements.

Finally, we will look this configuration from Step #2, which is the comfort message. We do not need to specify the loop on the background music, as that's already set and should not be changed.

Voice Workflow

This article explains the available node types, workflow generic properties, the new designer toolbar and more.

You can find the new voice workflows by navigating to the Beta Portal > Voice section > Workflows.

To open the designer, simply click on one of the Workflows. To modify the workflow settings, such as the name or the idle timeout, click the pen icon.

Workflow generic properties

Workflow Name

The workflow name is a mandatory parameter as this will be used as a selection for a particular channel.

We provide a set of best practices for naming your workflows.

- Mention the business flow your workflow satisfies (eg. Voice - Support channel)
- Create backup identical workflows to test changes on a test workflow before applying them to your customer-facing flows.
- Create different flows for the same use case with different customer-facing customizations (eg. for announcements).
- Do not reference "Workflow" in the name, it simply takes space and provides no valuable information to you.
- Do not use generic names such as "Test flow" "main flow" "main channel" "primary flow" "New workflow" etc as this does not provide any real information to anyone within your organization.

Workflow designer

Once you provided the generic properties for a workflow and you clicked Create, the user interface will automatically move you into the workflow designer to begin customizing your flow.

The new workflow designer uses Nodes as the previous workflow designer, however, we visualize those nodes much better in the new designer. In addition to that, we broke down bigger nodes from the previous implementation into smaller, more flexible, and easy-to-use nodes.

Node types

Start Here

Start here is the default node type. The purpose of this node is to highlight the starting point of your workflow.

Click the black dot and drag it in any direction to open the context menu with other available nodes that you can select to build up your workflow.

Check opening hours

This node verifies your Channel's opening hours and allows you to make routing decisions based on the output of that verifications. These outputs are available:

- Open: The Channel is within business hours, with no holidays.
- Closed: The channel is outside of business hours, no holidays.
- Holiday: Holiday is set for the channel, and the channel is closed.

You may modify the name of the Check opening hours as per your requirements.

Announcement

This node allows you stream a TTS message or upload a wav file to play an announcement for your customers. For example, a greeting, welcome message, GDPR message etc.

It has a single output, which indicates the next action in the workflow.

Auto-Attendant

This node allows you to set menu options for the keys 1-9 and 0. Star and hash keys are ot supported in this node.

You may select up to 10 menu options, each option will create an output.

You may use TTS or upload a wav file to announce the customer about the menu options available.

You may set a repeat count and a timeout. If the customer does not press any key for the specified amount of time, then the repeat count is increased. Additionally, if the customer presses a key that is not specified within the node, then the repeat count is increased as well.

If the repeat count feature is used, then the repeat message is mandatory, it can be TTS or WAV file. We recommend using a different repeat message than the auto attendant main question.

The node has the following outputs:

- All Selected menu options, each option has an output.
- Retry exhausted: Decide what should happen when the repeat count is exhausted.

Custom question

This node allows you to configure more complex questions that an auto-attendant would not satisfy. You can configure the maximum digits allowed, for example, if you wish to collect a profile number and store it in a workflow variable, as well as create custom regular expressions to validate the customer inputs.

Usually this node is used with a Switch node.

Outputs:

- Success: Customer pressed the keys and passed regex validation (if any)
- Retry exhausted: Customer failed to press any key or the regex validation did not pass, the repeat count maximum value is reached.

Redirect to phone

This node allows you to send the call to an external phone number, outside of Buzzeasy. Pair this with another output to handle a specific scenario.

Transfer to channel

Transfer the call to a Buzzeasy channel. Pair this with another output to handle a specific scenario.

Set Data

Set Data node allows you to set workflow data and re-use it later on either in a Switch node or future custom integrations

Outputs:

- Then: Specify what should happen after setting the data.

Switch

In workflow designer 1.0, conditions were used to take actions based on customer data. We introduced a dedicated node for that which we now call Switch.

You can specify up to 5 workflow conditions. Each condition will have its output. Besides that, the default output is provided.

You may use this node paired with the Set Data or Custom question node to achieve complex flows.

Outputs:

- Each property has its output. Decide what happens based on these properties.
- Default: Acts as a failsafe, decide what happens if no condition is met.

Queue

Allows you to route conversations to agents. when you create a queue, you must select the routing mechanism for it. It can be automatic or manual. You may not change this later on for a given queue, but you may delete the queue and recreate it with the new routing mechanism.

Manual queues allow skilled agents to pick items by themselves while automatic uses our intelligent routing mechanism to find the first skilled available agent. Agents have a new tab in the agent performance dashboard where all items in a queue assigned to their team are displayed, including the items in a manual queue.

Parameters:

- Queue Treatment (drop down). Select your queue treatment. Learn more about queue treatments for voice here.
- Max queue size. Specify the maximum number of parallel conversations allowed in the queue.
- Queue timeout. Specify the Queue Timeout for this particular queue.
- Attribute requirements. Specify the attribute, also known as skill, and value required to route conversations from this queue to agents.

Outputs:

- Timeout. Specify what should happen on Queue timeout.
- Size Limit Reached. Specify what should happen when the Max queue size limit has been reached.
- No Agent logged in. Specify what should happen when no agent is logged in across the tenant.
- No Staffed agent logged in. Specify what should happen when agents with no skills or work-item thresholds are not logged in.

Before a conversation enters the queue node, the following outputs are evaluated, in this order:

1. No agent logged in. System checks if there are any agents logged in across the tenant, if yes, proceed to the next check, if not, use the output flow.
2. No staffed agent logged in. System checks if the logged-in agents are skilled and have the appropriate work-item thresholds, if yes, proceed to the next check, if not, use the output flow.
3. Max queue size. System checks if the conversation would go above the specified limit, if yes, use the output flow, if not, the conversation enters the queue.

End conversation

Use this to close loose ends of your workflow. Once your customer reaches this point, it will close down the conversation.

Using the designer toolbar

The designer toolbar is located at the bottom left corner of the screen. Currently, the following tools are available:

Plus + sign will zoom in to the current focus area. The focus area is located in the centre of the screen. The same result can be achieved by using your mouse's scroll wheel.

Minus - sign will zoom out from the current focus area. The focus area is located in the centre of the screen. The same result can be achieved by using your mouse's scroll wheel.

The fit view button is the third option in the toolbar, this will automatically adjust the zoom to fit all nodes on the screen. This is useful to visualize the entire flow. The fit view will use the amount of screen available to you, this varies depending on your monitor size, resolution, accessibility options enabled, or browser zoom.

The toggle interactivity button will disable editing nodes. This is useful to scroll through the flow without accidentally editing any of the nodes or moving them around. You can move around the design of your workflow by clicking anywhere on the screen, holding the click, and moving your mouse around. Toggle interactivity to prevent accidentally moving nodes around or clicking selecting unwanted properties in your flow.

The validation error icon will inform you that you have 1 or more validation errors in your flow. The designer automatically validates your workflow as you create it, click the triangle to navigate to the first navigation error encounter. This will automatically adjust the zoom and focus the problematic node.

Saving a workflow

Saving for the new workflow designer is available at any given time, unless validation errors occur, in which case the save button is disabled.

Validations errors are highlighted by a Warning triangle on the header of the improperly configured node. In addition, designer tools located at the bottom left corner of the screen show the same triangle. Click on it to navigate to the faulty node.

The user interface highlights mandatory parameters through a red * or a red circle around the mandatory outputs. Additionally, hovering over the triangle will show a tooltip informing you about what is not correctly configured.

We will introduce more quality of life changes to the saving mechanism informing you about any unsaved changes before navigating away.

Edit workflow name

For existing workflows, you may edit their generic properties by clicking a workflow in the list, then use the pen icon on the top left corner of the screen. A modal window, or commonly known as popup, will be shown.

Other designer features

Cloning a workflow

To clone a workflow, simply click the Clone button and provide a new name for the cloned worklow. All nodes will be carried over and you will be redirected to the cloned workflow automatically so ensure all changes in the current workflow are saved before cloning.

Cloning a node

To clone a node, simply click the clone button for the node you wish to clone. All properties of the node will be carried over to the new node, however the input and outputs are not set.

You may clone a node as many times as you wish, but clicking the clone button multiple times for the same node will result in the clones placed on top of each other.

Multi-select nodes

To select multiple nodes, hold down the shift key on your keyboard, then, using your mouse, drag a square over the nodes you wish to select.

You may drag these nodes as well or press the backspace key to delete them.

Deep link nodes

You may copy the URL of a node by clicking the 3 dots menu, then copy link. Paste this link to your co-workers and colleagues, when click, this will redirect the user to the node you linked to. Please note that the user clicking the link must have access to the tenant as well as the proper role-based access control to view workflows.

Search for a node

When designing large workflows it can be difficult to match the output and inputs of nodes. The workflow designer provides a tool to help with that. When selecting an output, a search field is presented, you may search for an existing node in your workflow using it. Selecting a node from the search results will automatically link te output to the input of the searched node.

Redirect On No Answer

Redirect on no Answer (RONA) is a feature that helps to ensure voice calls are answered promptly.

If an inbound voice call, that has been routed to an agent, is not answered within a specified period of time, the RONA feature routes it to another agent.

The period of time specified for RONA to act on a call is named the RONA timeout.

The RONA feature takes an incoming voice call back to the queue, so it may be routed to another agent when the RONA timeout is exceeded.

Where an agent has failed to answer a call and RONA has redirected the call, the agent is put on break in the RONA break state.

No further calls are routed to an agent in break state, until they actively change back to idle state. In this way RONA ensures the call is not routed to an agent that is unavailable, but has not requested a break.

Set The RONA Timeout

The RONA timeout is set in the portal as part of the agent settings.

Select Agents from the portal sidebar.

The Agents blade opens, to the right of the portal sidebar.

Select the cog-wheel icon and Settings button, from the top of the agent's blade.

The Agents' settings blade opens to the right of the Agents blade.

Enter a numerical value in the RONA timeout text box. The RONA timeout is specified in seconds.

Select Save at the top of the agents' settings blade.

Chat

Webchat channel

Webchat is provisioned through Buzzeasy's new portal, it leverages various features such as download transcript, 2 built-in themes for quick provisioning, and the option to customize these individually, widget preview, widget demo, and many more!

Create a Webchat channel

The new portal now displays a Chat section provided your account has the proper role assignment, underneath it you will find the Webchat section.

This will display the list of channels and the option to search for a Webchat channel by name. Click a channel in the list to view the configuration and customization for that particular channel.

To begin provisioning a Webchat channel, navigate to the Webchat entry on the Portal, then click Create. You will be presented with a guided provisioning process. This process is split into multiple tabs.

Channel details tab

The channel details tab hosts your Channel name, which will be used as the default for Header text until you overwrite it. See the customization details for further reading about customizations.

Additionally, it hosts the Workflow selection. Both of these parameters are mandatory, once you provide them, you can skip to any tab you prefer by either clicking the Next button or the tab name you're interested in. Edit view presents the user with the same tabs, no changes in the creation process are not editable later on.

Widget configuration tab

The widget configuration tab hosts the basic customization to get started with, such as:

- Select between invitation message, welcome message and no message. Purpose of these is to entice the customer to engage in a conversation through webchat.
    - Invitation message will be sent on page load, displaying an unread notification to the end user as well whenever the page where the widget is hosted is loaded.
    - Welcome message will be sent when the widget is clicked on.
    - No message. The customer will have to engage without any enticement from the channel.
- Allow attachment upload. Allows you to enable or disable the option to upload attachments for your customers.
- Agent avatar image URL. This image is presented to the customer when engaged in a conversation with a human agent.
- Bot avatar image URL. This image is presented to the customer when not engaged in a conversation with a human agent.
- Starting visual theme. Select between Buzzeasy Light or Dark themes. Don't worry, you will be able to change this later. See the customization section for further reading.
- Header text. Set a text to be shown on top of your widget. If not set, channel name will be used.
- Subheader Text. Set a text to be shown instead of 'Bot' text. If not set, Bot will be shown. This setting does not overwrite Agent display name.
- Widget language. Select the language of the widget elements. The Widget is currently offered in: English, Hungarian, Serbian and Bulgarian. More languages will be added in the future!

NOTE Provide direct links only for URL fields. You may host your image on an image hostile website such as imgur.com, flickr.com, postimages.org, etc. Direct links end with the file extension (jpeg, jpg, gif, png). While we support gifs as avatars, we do not support mp4 or WebM file types. If no URL is provided, the chat widget will use the default avatars.

Business hours tab

The business hours tab allows you to set your channel's Time zone, opening hours, holidays, and exceptions.

Completion codes

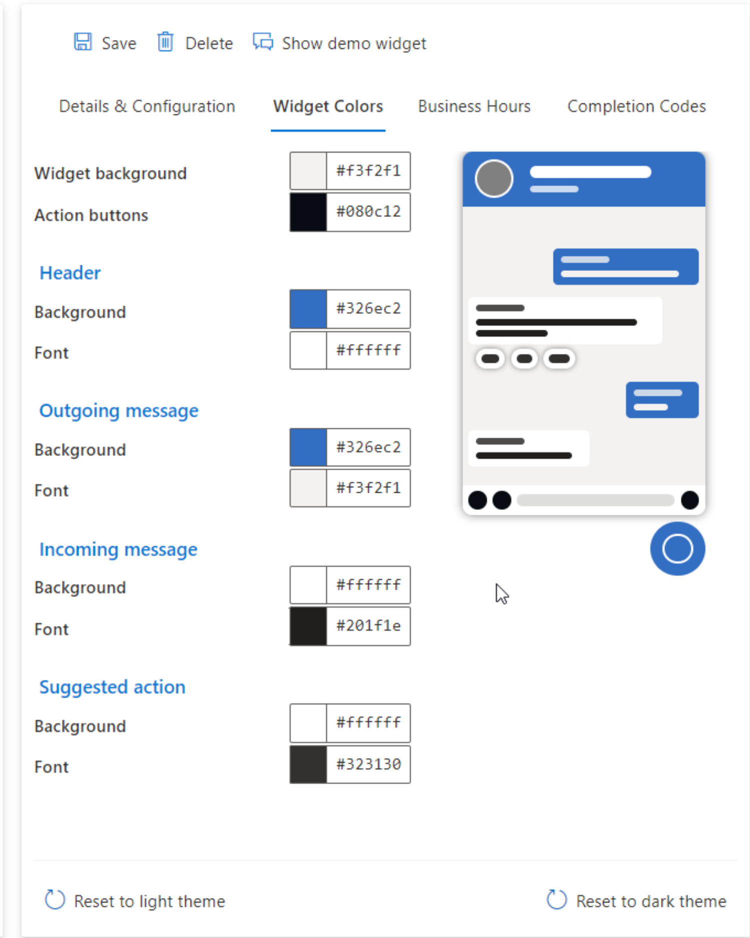
Configure your completion codes. Completion codes are used by agents when they close tasks.

Customizing the Chat Widget

The chat widget allows for several customization options, such as colours, avatars, and more. This section focuses on colour customization available to you. For other customization options please see the Widget configuration tab described above.

To begin customizing your webchat channel, follow these steps:

- Using the new portal, navigate to Chat > Webchat.
- Click the Webchat channel you wish to customize, then click the Widget Colours tab.



On the right side of the screen, you are presented with a preview of your widget. This shows your changes in real-time without needing to save them and push them to your live customers.

The bottom of the screen features two resets, one for a light theme and one for a dark theme in case you wish to start over. Note that these will not overwrite your live widget unless you click Save.

The left side of the screen presents you with the configuration options available.

Parameter Name	Description
Widget background	Applies to the background of the widget.
Action buttons	Applies to Send/Attachment buttons located within the Text box.
Header - Background	Applies to the Header of the widget, scroll bar colour, suggested action highlight on hover.
Header - Font	Applies to the text colour within the Header of the widget.
Outgoing Message - Background	Applies to the background of the messages sent by the customer.
Outgoing Message - Font	Applies to the text colour of messages sent by the customer.
Incoming Message - Background	This Applies to the background colour of the messages received by the customer, input box background colour, and background of menu entries for the 3 dots menu.
Incoming Message - Font	Applies to the text colour of the messages received by the customer, input box text colour, and text colour of menu entries for the 3 dots menu.
Suggested Action - Background	Applies to the suggested action, also known as a quick reply, background colour.
Suggested Action - Font	Applies to the text colour of the suggested action.

Embedding The Chat Widget Into Your Website

Buzzeasy offers an easy way to embed the new widget into your website by providing a code snippet that can be added as a child of the <body> element. Additionally, website developers can specify one or more font families for the widget as well. The widget may inherit this from other places if not specified.

Should you change the appearance of your widget, you no longer need to copy the snippet again, once you click Save on a channel, the changes are pushed through and will be visible onto the website after a refresh without any additional development effort.

The chat widget uses rem, which stands for root em, a unit of measurement that represents the font size of the root element. This means that 1rem equals the font size of the html element, which for most browsers has a default value of 16px. Using rem can help ensure consistency of font size and spacing throughout your UI.

The website developer can alter the widget sizing by specifying the font size on the html tag.

Examples:

This will make it bigger.
<html style="font-size: 24px;"> rest of your code </html>

This will make it relative(1%) to the size of the viewport.
<html style="font-size: 1vw;"> rest of your code </html>.

This will make it relative to the width of the viewport but also allows speciying a minimum and maximum size.
<html style="font-size: clamp(16px, 1vw, 64px);"> rest of your code </html>

Practical examples:

```
<!DOCTYPE html>
<html style="font-size: 1vw;">
<head>
<style>
#buzzeasy-webchat {
  font-family: Cursive;
  }
</style>
</head>
<body>
<h1>Widget demo</h1>
<div id="buzzeasy-webchat" data-webchat-url="redacted"></div>
<script defer src="redacted"></script>
</body>
</html>
```

We recommend experimenting with the widget on w3schools sandbox by copy pasting the code above and replacing the redacted widget div with your own widget snippet.

Miscellaneous

Customer's access to history

Customers can access chat history for up to 30 days even if they closed the website the widget is embedded into. The conversation history is retrieved based on a Thread ID which is a combination of ChannelId and External Conversation ID. The external conversation ID is stored within the Local Storage of a given browser. Customers can scroll through the history from the past 30 days.

Closing the browser tab

The Chat Widget leverages a heartbeat mechanism enabling the termination of conversations where the customer is no longer around, for example, the customer closed the browser tab. In such scenarios, after a period of up to 2 minutes, the conversation will be terminated. In addition to that, the customer may voluntarily terminate the chat session by clicking the hamburger menu and selecting Close Conversations.

Downloading chat transcripts

Customers can now download their conversation history locally. Simply click the 3 dots menu and click download transcript.

If there were no attachments present in the chat history, then a simple txt file will be downloaded.

If there were attachments present in the chat history, the system will fetch these attachments and compile them into a zip file the customer will be able to download. The zip file will contain the txt file with the actual transcript and a folder with all of the attachments.

Please note it may take some time to prepare the transcript, this varies based on the size of the attachment(s), server speed as well as your local internet connection speed. The entire visible history will be downloaded.

The transcript.txt file will contain data such as:

- Downloaded At timestamp
- ConversationId
- Entire text-based transcript
    - Timestamp of the message
    - Who sent the message -> Customer or Channel name

Display name for Widget header

Buzzeasy uses an agent's profile to inform the customer to whom it is connected, a bot or the agent. In the case of agents, Buzzeasy uses the Agent display name from the agent's profile. If the name is not configured for a given agent, then the real name will be used.

To configure the display name for your agents, follow the steps mentioned in this article.

Limit on concurrent webchat conversations

To prevent bad faith actors, Webchat limits the number of parallel conversation to Agent seat count * 10 per tenant.

Example: If your tenant has a 10 agent seat count, your parallel conversation limit for Webchat is 100.

Buzzeasy will offer ways to increase the multiplier without needing to increase the agent seat count.

Queue Treatments

Buzzeasy now offers a dedicated Queue Treatment configuration for Voice and Chat. This article refers to Queue Treatment configuration for Chat media groups.

To create a queue treatment, follow these steps:

- Using Buzzeasy's new portal, navigate to Chat > Queue Treatments.
- Click the Create button. A new modal, or window, is open.
- Provide a name, enable or disable queue timeout and specify the value in seconds.
- Click Next.
- You can begin adding steps. Available steps are:
    - Send Message. Free Text. You may use a {position} parameter to stream the customer's position in the queue.
    - Wait. Duration in seconds.
- Once you are satisfied with your configuration, click Create. You may now use this Queue treatment in your Workflow.

The queue treatments menu offers an estimation timeline based on your steps. These estimations represent the moment when the message will be streamed to the customer after entering the queue.

You may re-order queue treatment steps through drag & drop. You may select to repeat your queue treatment from a given step, to do so, simply click the repeat treatment box and set the step you wish to repeat the treatment from. Should you re-order your step, the system will retain your step position you decided to repeat from, make sure to adjust this if it does not fit with your desired queue treatment.

To provide a good customer experience, we recommend adding Wait steps with a longer duration to avoid spamming your customers with messages.

Question Answering Integration

As of October 2022, Microsoft announced that it would no longer be possible to provision qna through qna.ai, the replacement being Lanague Question Answering.

Buzzeasy provides an integration point towards Microsoft's Language Question Answering service.

Using Buzzeasy you can integrate your custom question answering from Microsoft to your Buzzeasy digital channels.

Provision Language Question answering

This section of the documentation provides a comprehensive walkthrough for the Azure Resources provisioning. You can read more about Language custom questions through the official Microsoft documentation found here

To begin provisioning Language Question Answering, follow these steps:

WARNING

You require Azure Portal permissions to perform these steps. Additionally, consult with your team about costs as Language Question Answering has its own cost.

- Navigate to https://portal.azure.com
- In the search bar of Azure Portal, type in Marketplace. This will take you to Azure's Marketplace.
- In the Marketplace search bar, type in Language Service, then click Create.
- Select the Custom question answering, then click the Continue to create your resource button located at the bottom left corner of your screen.
- Select your azure Subscription, then select an existing resource group or create a new one. We recommend giving it a good name.
- Select the region that is closest to your customers. Keep in mind that different regions might have different pricing options.
- Provide a name for your new language service. Follow your internal Azure naming conventions, and keep your cloud environment clean!
- Select your price tier. We do not recommend using an F0 plan for live customers, keep this for your internal testing.
- Select the region for the Azure Search service, this will be created alongside your Language service.
- Select the pricing for the Azure Search service. This varies based on your usage and amount of projects, also known as knowledge bases. We do not recommend using Free F for live customers.
- Read the Responsible Use documentation, then click the checkbox to agree to the terms.
- Your administrator may configure tagging policies, click the Tags tab to add the proper tags according to your internal policies.
- Once you're all set, click the Review+Create button. Validation will begin.
- If you passed all of your internal policies, validation will be green and the deployment will begin. This can take up to a few minutes.

Once deployment is complete, you will need to grab 2 details required by Buzzeasy. In the Azure Portal search bar, type in the name of the Language Service created earlier. On the left side of the screen, click the Keys and Endpoint menu item, then click Show Keys. Copy Key 1, this will be your Buzzeasy Secret. Copy the Endpoint, this will be your Buzzeasy Endpoint URL.

Managing Projects & Knowledge Bases in Language Question Answering

In Language Question Answering projects are a set of knowledge bases. In Buzzeasy you reference a project's name instead of a Knowledge Base.

To create a project for the first time, navigate to https://language.cognitive.azure.com, then log in with your Azure credentials.

Click the Create New button and select the Custom Question Answering option.

Select one of the two options presented, then provide your project's name, description, source language, and default answer. You may change your Azure Language Resource or the Azure search Resource as well.

Click Review, then click Create Project. Your project is now created! Copy the exact name, you will need this in Buzzeasy.

Now that you have a project, click on it, then click Add Source. You can fetch data from URLs, and files as well as built-in chit-chat knowledge bases.

You can add as many sources as your pricing allows you to.

Click on a source to begin reviewing, modifying, and testing questions. Once you are satisfied with the results, click Save.

On the left side of the screen, click Deploy Knowledge base. You must perform this step to push your changes to the live after testing them.

Adding Language Question Answering to Buzzeasy

Navigate to Buzzeasy's new portal and locate the Integration section. Click the QnA bots.

Click the Create button and fill in the details as follows:

- Project Name: The name of your Language Question answering project (case sensitive).
- Endpoint URL: Endpoint of your Language Service. Obtain this by searching for your Language Service in the Azure Portal > Keys and Secrets.
- Secret: Key 1 of your Language Service. Obtain this by searching for your Language Service in the Azure Portal > Keys and Secrets.
- Confidence threshold%: Percentage matching the knowledge base question. If the QnA bot falls below this threshold, it will exit the conversation. Read more about the confidence score through Microsoft's documentation. We recommend setting a 50-70% confidence threshold.

Using QnA in Buzzeasy Workflows

Buzzeasy Chat Workflows feature a QnA node type, this will allow you to select one of your existing QnA configurations and specify the next step in case the QnA falls below the confidence threshold and exits.

Migrate From QnA Maker To Question Answering

Microsoft provides extensive documentation on how to migrate from qnamaker.ai to Language Question answering.

To make things easier for you, this article provides a summary of how to migrate from qnamaker to Language Question Answering.

Follow these steps:

- Assuming you already have a language service and search created as detailed earlier in this article, navigate to qnamaker.ai.
- Click the Start Migration button.
- Select your tenant.
- Select the QnA maker resource you want to migrate.
- Select the target Language resource.
- Select the knowledge bases you want to migrate.
- Click Next.

This might take up to a few minutes depending on the size of your knowledge base. Your knowledge base will be copied over to https://language.cognitive.azure.com/. We recommend reviewing the questions and answers pairs after the migration is complete.

For further instructions, please follow the official Microsoft documentation.

Agent Assistance

Buzzeasy allows administrators to configure a Question Answering to assist agents. Generally, Question answering is used to save agent time by providing answers to end-customers. However, Agents can benefit from the same functionality as well while engaged in a chat conversation with an agent.

You can specify a QnA configuration for a given queue node by setting the Agent Assistance field to the QnA configuration you wish to use. This configuration will only be used to assist agents. Should you want to use the same configuration to aid customers as well, simply add a QnA bot node to your workflow.

Limitations

The new Buzzeasy Language Question Answering integration is supported for the newly released digital channels such as Webchat, Viber bots, and Facebook Messenger.

Digital channels configured through the legacy portal are not supported, however, future digital channels released through the new portal will benefit from support right away.

Below is a feature matrix of the new Language Question Answering support in Buzzeasy.

Channel	Question Answering	Follow-up prompts	Markdown	Image replies
Webchat	✓	✓	✕	✕
Facebook Messenger	✓	✓	✓	✕
Viber	✓	✓	✓	✕

In addition, the Agent Assist feature has been temporarily disabled

};

Custom integrations

Custom Chat bots

Buzzeasy provides an easy to use interface to configure your own chat bot integration in the portal. This feature is currenly limited to internal custom development teams as the Chat Bot Integration API and SDK are required for developing a custom chat bot.

A user is required to have the Integration business entity assigned to their profile in order to view and edit this section.

Upon navigating to the New Buzzeasy Portal > Integrations > Chat bots, a user will be presented with a list of existing custom bot, if no custom chat bot is created, then a user may click the +Create button and follow the on-screen instructions.

- Provide a name for the Bot. This will be referenced in the Workflow.
- Provide the base url of your bot. This will then be used to create callback URLs automatically.
- Provide your API key.
- Enable/Disable typing notifications. If enabled, Buzzeasy will send and expect typing messages through the /typing callback URL.
- Bot Callback URLs. This section is read only, it provides information to the developer.

Additional configuration may be required. This will be partially provided by the Buzzeasy team.

```
"ChatBotIntegrationApi": {
   "Authority": "Provided by Buzzeasy Team",
   "BaseUrl": "Provided by Buzzeasy Team",
   "ClientId": "Provided by Buzzeasy Team",
   "ClientSecret": "Provided by Buzzeasy Team"
 },
```

```
 "ApiKey": "your API key",
 "BotId": "Name of the custom bot"
```

Passing Data To Workflow Through The Widget

Buzzeasy's new Webchat widget allows website integrators to pass Workflow data through the widget.

The website can define the data that need to be passed across before the chat starts (customer presses the chat button). Buzzeasy will then pass the data to the workflow.

Example integration code:

```
window.getDataForBuzzeasy = function(){
 return Promise.resolve({
   workflowData: { "Key1": "Value1", "Key2": "Value2" }
 });
};
```

Content Manager API

Buzzeasy provides a Public API to retrieve conversation history based on the internal conversation ID. This can then be used to pass the conversation history to other systems.

Required to access the API, those will be provided by the Buzzeasy team:

- The endpoint.
- Credentials to generate a Bearer token used to authenticate.

Required parameters:

- Conversation ID (GUID)

Returned data example:


```
{
    "id": "110b1f3c-b952-4023-9e80-3ecf9ed08b59",
    "creationDate": "2022-08-10T12:59:29.2038395Z",
    "conversationId": "be6bddecd0bb452ca71ae0906b107fb2",
    "channelType": "2000010",
    "from": "Bot",
    "text": "Okay, we need your phone number to identify you.",
    "attachments": [],
    "suggestedActions": {
      "to": null,
      "actions": null
    },
    "tenantId": "<tenantID>"
  },
  {
    "id": "4f4027f0c72f4565a205c931823c3446",
    "creationDate": "2022-08-10T12:59:33.4188797Z",
    "conversationId": "be6bddecd0bb452ca71ae0906b107fb2",
    "channelType": "webchat",
    "from": "Customer",
    "text": "+",
    "attachments": [],
    "suggestedActions": null,
    "tenantId": "<tenant ID>"
  },
```

Integrations

Service Hooks

Service hooks are a developer level entity in the administrator portal.

A service hook gives you the ability to push notifications to a URL for custom integration purposes.

To use the service hooks a user requires a role with integration permissions.

Service hooks allow for notifications sent to a third party on a specific event. The data may be used programmatically.

Abandoned Conversation Service Hook

This service acts on the event of an abandoned conversation.

A conversation is abandoned if a customer terminates their conversation while they are in the queue.

When conversations are abandoned from a queue, a notification goes to the URL configured in the Service hook portal entry, with the following information:

- Customer Phone number
- Time in queue
- Time stamp
- Queue

Outbound call service hook

This hook acts on the event of a new outbound call being initiated.

An outbound call is initiated when an agent participant clicks the new outbound call button, selects a channel and provides the dialled number, then clicks the dial button.

A notification is sent to the URL configured in the service hook portal entry with the following information:

- agentID: The ID of the agent.
- targetPhoneNumber: The dialed number.
- Timestamp: Timestamp when the outbound call was initiated.

Configurable Properties

API Key

Required field.

Included in each HTTP request as a header field, with the name, x-api-key.

Event Type

This is the event on which the notification is sent

Callback Url

The URL to which the notification is submitted

Enabled

A slider control. To enable the service hook, slide the control to the right.

The control appears white on a blue ground when enabled.

The control appears black on a white ground when enabled.

Actions

Download the json schema of the service hook here.

Manage Agent Breaks

Discover how to manage breaks in this section. The section includes how to configure the breaks that agents see and the order in which they display. To do this you need to learn how to create, rename, re-order and delete agents' breaks. the first step for all of these tasks is to select agents' settings.

Select Agents' Settings

Select Agents from the portal sidebar.

The Agents blade opens, to the right of the portal sidebar.

Select the cog-wheel icon and Settings button, from the top of the agent's blade.

The Agents' settings blade opens to the right of the Agents blade.

You are ready to create, re-name, re-order and delete agents' breaks.

Create a Break Name

Select Settings from the Agents' blade

Select + Add new break to add a new break name.

The Add new break window appears over the portal.

Enter a break name and select Create.

Rename a Break

Select Settings from the Agents' blade

Select a break name in the Agent's settings blade.

Select the pencil icon to rename the break name.

The Rename break window appears over the portal.

Modify the break name. The Rename button will enable.

Select the Rename button to rename the break.

Re-order Break Names

Select Settings from the Agents' blade

Select a break name in the Agent's settings blade.

Use drag and drop to re-order the break name. This affects the order in which agents see the break names when they request a break.

Delete a Break

Select Settings from the Agents' blade

Select a break name in the Agent's settings blade.

Select the trash icon to remove the break name.

The break name is deleted immediately, without a confirmation prompt.

HEAD OFFICE

Central House
Beckwith Knowle
Harrogate
HG3 1UG

T 0800 983 2522
E sayhello@redcentricplc.com
W www.redcentricplc.com

redcentric

AGILE • AVAILABLE • ASSURED