**YiwiseBot User Guide**

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# The call center

## Call the task

### A new task

In the left index bar, click call center - call task. Click "new task" at the top of the directory;

Enter the name of the task and select the word template to be used. The word template supports keyword search.

Language 1.0 using the system's own language design content; Telephony 2.0 USES the yi-brain speech robot.

### Start the way

Manual startup: users need to manually "start the task" during the dialing period;

Automatic start: during the dialing period, the system will automatically call outside;

Note:

(1) the default outbound call period of the system is 9:00-20:00, and the system will automatically suspend outbound call outside this period;

(2) both startup modes can set the no-dial time period, and the system will automatically suspend the calling task during the no-dial time period;

### Outbound way

There are four ways to call out: mobile phone number, fixed phone, no calling, policy group;

(1) mobile phone seats can be selected

(2) single choice of fixed-line seats

After selecting a good line, the number of AI should be set. The number of AI set should be less than or equal to the total number of AI.

If the set number of AI is greater than the remaining number of AI, the task will not call out until the system releases the required number of AI.

1. No calling single

No calling seat is selected. When no calling seat is called out, the number will be displayed randomly.

1. Outbound policy group

Based on the intelligent line scheduling of the destination, it can effectively improve the customer connection rate. A line fault can be achieved in the group automatic switching, call efficiency does not discount. When using policy group outbound call, you need to contact the account manager first to set up the policy group for the system, and then bind the required lines within the policy group.Route scheduling is based on the following three principles:

The system will identify each call customer home, automatic scheduling policy group within the same home of the line to the customer call;

(2) if there is no line with the same destination as the called customer, the line will be used according to the "scheduling priority" in the group;

(3) a certain line in the policy group is out of fault, the customer who originally planned to dispatch the line to call out will be automatically assigned to other lines to call out;When the fault is resolved, the task will automatically reschedule the line.

If a certain line in the policy group is overdue, the detection will automatically switch to other lines in the group to continue to dial, the task will not be suspended, and the warning will be pushed as usual.

5 if a line in the strategy group is overdue, the detection will automatically switch to other lines in the group and continue to dial. The task will not be suspended, and the warning will be pushed as usual.

After setting up the policy group, when creating a new call task, the policy group can be selected from the outgoing call mode

### Multiple concurrent

(1) select the number of concurrent calls within the range of the number of concurrent calls provided by the system;

(2) when fixed-line or no calling is selected, after selecting the line to be used, set the number of AI to be used. The number of AI to be selected must be ≥2 to use the multi-concurrency function. According to the number of AI selected by the user, the system will prompt the range of the number of available concurrency (when the number of AI is n, n+1≤ 2n).

(the system displays the minimum number of concurrences by default)

Note: using multiple concurrent possible call loss the customer (customer after connect AI reclined at the table without free dialogue with customers and customer hang up and call loss customers can be in multiple concurrent tasks, click on the "customer list", found in the "phone state" kind of "loss", selected to add to the call after call loss clients, reducing the cost of business opportunities.

### Hang up SMS push

If you need to push the hang up message, you can tick the intended customer who needs to push the message, and then select a message template;

Tip:

1. Probe will remind the current balance can also be sent the number of short creed, to avoid the insufficient balance resulting in the failure to send SMS;
2. In order to meet the operators' requirements for sending financial SMS, the time of sending financial SMS is from 9:00 to 18:00. If the SMS is not sent on the same day, it will be stored in the system until 9:00 the next day for sending (the specific rules of sending SMS are subject to the current rules issued by the operators!). To improve the success rate of financial text messaging.

Short message template can be clicked on the call center - intention short message - short message template, and then click "new short message template" in the upper right corner, you can independently edit the text message content, after the operator review, the new short message template can be used;

### Intent WeChat push

(1) WeChat push people

If it is necessary to push the intended customer information (including customer phone number, concerns and attributes, intention level analysis, call details, etc.) to the WeChat you bind in real time, you can tick the intended customer that needs to be pushed, and then select a good WeChat pusher.

Customers with different intentions can be pushed to different WeChat pushers.

(2) WeChat push mode

All push: the selected WeChat push person will receive all the same intended customer information;

Push in turn: push the intended customers by means of polling, and each pusher will receive the average number of intended customers' information.

For example, "intention to push WeChat" is ticked to push class A customers, and WeChat pusher chooses two (xiao zhang and xiao li).

When the system identifies four class A customers (code name) :

Select "all push", xiao zhang and xiao li will receive the customer data information;

Select "push in sequence", the customer will push to xiao zhang, will push to xiao li,

 Will push to xiao zhang, will push to xiao li

 In this way, xiao zhang and xiao li have received an average number of intended customers.

(3) automatic allocation of intended customers

When you choose to push successively, you can choose whether to automatically assign the intended customer to the corresponding pusher (when A new intended customer A is pushed to B, A new customer A will be automatically created in "my customer" of B account).

### Warning message push

When the following situations occur, the system will push the warning message. After binding WeChat, you can also push it to WeChat.

(1) task is suspended due to account arrears;

(2) the expiration of the seat will cause the task to be suspended (30 days, 7 days, the expiration day and 7 days will be pushed);

(3) the account balance is less than 10 yuan;

(4) line fault (no connection for 50 consecutive times);

(5) 90% call completion;

(6) 100% call completion;

Warning message pusher can choose more than one, or set the default group.

### Manual function

Select the operation template that contains the manual node.

Note: you cannot use your mobile phone number as a calling method when transferring to a human service.

(1) go to the manual number setting

Manual input

In the "transfer number" box, you can manually enter the transfer number and press enter to confirm.

Drop-down selection

The number shown in the drop-down menu is the contact number of the system account and the member of the sub-account.

When importing customers, you can set the manual number for each customer

Check "when importing customers, set the manual number for each customer" and fill in the manual number (required) in the template of importing customers.

(2) go to the manual setting

Manual language design: double-click edit jump node, set jump to manual.

### Automatic redial

Customers such as call loss, busy line and refuse, can choose to automatically redial, and can set the automatic redial interval and replay times to improve the reception rate.

Interval duration: for example, if the interval duration is set to 0.1 hour (6 minutes), the system will automatically call the customer again after the 0.1 hour (6 minutes) of a calling loss/busy line/rejected customer is reached.

### Submit a task

Click "submit" to complete the new call.

### Import customer

After the new calling task is completed, click to view the task. In the upper right corner of the "operation overview" page, click "import customer". There are two ways to import customers: single import and batch import;

Description: the customer information imported into the calling task will be automatically updated and overwritten with the existing customers of the system

If the customer does not exist in the system, the system will automatically create the customer in "my customer";

If the system recognizes the customer with the same phone number, the system will automatically update the customer's information (including the name, etc.).

(1) single import customer

Click "single import" and fill in the customer information. The field with "\*" is required.

(2) batch import of customers

Click "batch import", click "download template" and then enter customer information, no more than 100,000 pieces at a time, then click "click upload".

Note: read the import instructions in the import template carefully!

### Scramble the Numbers

If you choose to scramble the order of Numbers, the system will automatically scramble the order of imported customer Numbers to reduce the probability of the existence of number segments (consecutive Numbers) and improve the connection rate.

### Import export list

Customer imports can be viewed in the import and export list at the top right of the page.

If there is an import failure, you can click "download". The reason for the failure will be detailed in the table.

### Start task

If the starting mode of the task is manual, click "start task", and the system will carry out the outbound task within the dialing period.During the non-dialing period, the system will automatically suspend the task while it is still in progress.

Tip: click "refresh" to refresh the calling progress

### The customer is not called in for additional tasks

If you want to import the uncalled customer into other calling tasks, you can select a good customer, select another calling task, and then click "import".

Note: you cannot import the calling task with variables. The calling task with variables will be grayed out and cannot be selected.

### The calling customer is added back to the calling task

(1) add it back to the current task

After checking the customer, click "add to dialing task again" and you can make a second call to these customers when you start the task again.

For example, in the following figure, after selecting the customer "busy line", the customer "jiang li zi" has two busy lines. Click "add to the calling task again", then the list of uncalled customers will only show the customer information once, and the system will only dial the customer once.

Click "deduplication of customer information" to see the list of customer information after deduplication more clearly. The list after deduplication shows the latest call status of the customer.

(2) calling customers import other calling tasks

After checking the customer, select another task and click "import to task". Automatic deduplication during import.

Note: you cannot import the calling task with variables. The calling task with variables will be grayed out and cannot be selected.

## At the management

Seat management includes the summary and management of data such as AI seat, manual seat and seat group.

### AI reclined at the table

The AI seat will list the seat information owned by the account, including the number of seats, the opening and ending time of the seat, the number of days used, etc.

### Artificial reclined at the table

Artificial seating can be used for artificial intervention, artificial incoming reception and other functions. Additional artificial seats can be added to the seating management-manual seating. A manual seat can only correspond to the selection of one employee, the line can be bound to more than one.

### At his table set

A seating group may contain more than one manual seating.

1. Manual seating

If the type of seating is "artificial", the members needed in the seating group can be selected (multiple choices can be made). The members are the sub-account members in the account, and the company members can be managed in the system administration-team management.

1. AI reclined at the table set

If the seat type is "AI", it is necessary to select the AI seat and apply the technique for exhaling or exhaling, and then set the number of seats.

## Intelligent inspection

### The rule engine

In the "rules engine" module of "intelligent quality inspection", you can customize the rules. Click "add quality inspection rules", fill in the rule name, and select the rule type, plus/minus requirements (plus/minus items), and rule attributes.

Among them, the types of rules include: customer service standard, standard language, polite language, service taboo, overcommitment, complaint tendency;

Rule attributes include: quality control keywords, business concerns.

For example, you can select the type of rules as standard Chinese, and set the quality control keywords "please" and "you" as bonus points.

### Quality inspection tasks

Click "new quality control task", enter the task name and select quality control rules (multiple options are available).

Score setting and range setting between. If the quality control scope is set to upload the recording files, it is required to explain whether the left channel and the right channel are customers or customer service. Click "ok" to complete the new quality control task.

Click "start task" to start the voice quality check for records that meet the quality control range.

## Artificial call out

### Manual external call/manual intervention environment detection

The environment detection function can detect your hardware device to ensure that your device is stable and reliable. I suggest wearing headphones.

You can also click on the quick navigation bar for environment detection.

### Add artificial seating

In the "manual seat" section of "seat management", click "add" to select the name and line of the employee. The line can be selected more than one.A human seat can only select one employee.

### Cloud manual outgoing

Single outgoing call

Insert the earphone into the computer, click "artificial outgoing call", input the called number and select the line, then the artificial outgoing call can be made on the cloud.

Batch outgoing call

Click "batch outgoing call", select the group, download the template, import customer information, and then click "confirm call", the robot will start outgoing call.

If the customer is connected, a pop-up box will pop up and click "access phone".

(3) "my customer", "contact history" to view customer information, you can click on the upper right corner "manual outgoing" to make a cloud call.

When calling out, it can record the follow-up situation in real time and classify customers manually, which can better and more accurately follow up customers. AI initial screen + manual follow up can greatly improve the conversion rate of customers.

### AI assistant

Turn on the AI assistant and select the words you want to refer to.

During the call with the customer, the AI assistant can search the questions in the knowledge base and refer to the corresponding words.