Alcatel-Lucent Enterprise Connect powered by AKIO
Agent

User guide

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Alcatel·Lucent Enterprise

Table of contents

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History

Software version	Date	Author	Subject
7.30	28/07/2023	AKIO	New section *Choosing how the list of folders is displayed* New criterion *Associated data* in the folder search New qualification criteria window New filter on the *Agent* column in the list of folders Images updated following the replacement of certain icons in the list of folders and action bar
7.29	26/05/2023	AKIO	Permanent deletion of external desktops/agents Removal of the *To external agent* action from email folders Clickable folder number in all screens displaying a contact's folder history New topics *Sending an email during a call* and *Redirecting a voice folder*
7.28	24/03/2023	AKIO	Ability to perform an outbound call from an address book Updated images showing the interface banner, following the addition of the address book
7.27	13/01/2023	AKIO	Update of the *Previewing the content of folders* section
7.26	18/11/2022	AKIO	Possibility to transfer a call from the remote control

1 Welcome to ALE Connect

ALE Connect is an **application for customer relationship management** that unifies all interaction channels (telephone, email, web chat, social networks). It optimises their processing, both in terms of response quality and volume processed. This **documentation** presents the functionalities intended for contact centre agents, whatever the media managed by the platform. The goal is to facilitate the software handling and to assist you in your daily tasks, particularly during the processing of the interactions submitted to you.

A single platform for all media

ALE Connect centralises exchanges from different media such as **phone**, **email**, **Facebook Messenger** conversations, or **chat** from a single interface. For each contact, ALE Connect generates a sheet that centralises collected information from existing folders and bring together the contact exchanges history.

Segment your activities

ALE Connect is built on a structure based on **business units**, each containing one or several interaction **queues** of a same media.

Agents are split into groups to which rights are assigned to these queues, according to their **skills**. All agents from the same group have therefore the same rights, the same access to the application functionalities, the same interface and the same folders to be processed. Assigning rights on queues and skills is the responsibility of the coordinator or supervisor. This setup is performed in the software administration interface (please refer to the corresponding *Administrator* documentation for more information).

It is therefore very easy to partition or not the activities according to operational or accounting needs, etc.

Realtime statistics versus reporting

ALE Connect provides dedicated functionalities for **supervisors**, as agent group managers. They can thus manage the activity, while helping the supervised agents in their daily tasks (please refer to the *Supervisor* documentation for further information).

For this purpose, the software offers a **dashboarding application** to monitor the realtime activity, as well as an integrated **reporting module**. This module provides standard reports, with the possibility to create your own reports, published in real time or sent off-line by email.

1.1 Minimum required configuration

Before using the application, ALE Connect must match with the following configuration criteria for an optimal use.

Compatible browsers

No matter the chosen browser, it must support the SSL protocol, use the Websocket API, run JavaScript execution and accept cookies. Any browser not listed below is not compatible with ALE Connect.

Mozilla Firefox 102 ESR

Internet temporary file settings should be configured as follows: enter about:config in the browser address bar. The list of Firefox settings is displayed. Then check that the browser.cache.disk.enable option is set to "true".

Google Chrome

Current version

Microsoft Edge

Current version

Screen resolution

- 1920 x 1080 – Recommended with a wide screen
- 1280 x 1024 – Minimum resolution supported
- Regardless of the resolution chosen, the browser tab in which ALE Connect is opened must use **100% zoom**, and **must not be reduced below the supported resolution, or enlarged.** Any browser or operating system options that affect the scale, zoom, layout, text size, resolution or orientation of the software may cause ALE Connect to display incorrectly.

Memory

- Recent desktop PCs with **2 GB** of RAM
- Minimum prerequisite for an ALE Connect activity only and without third-party tools

Network

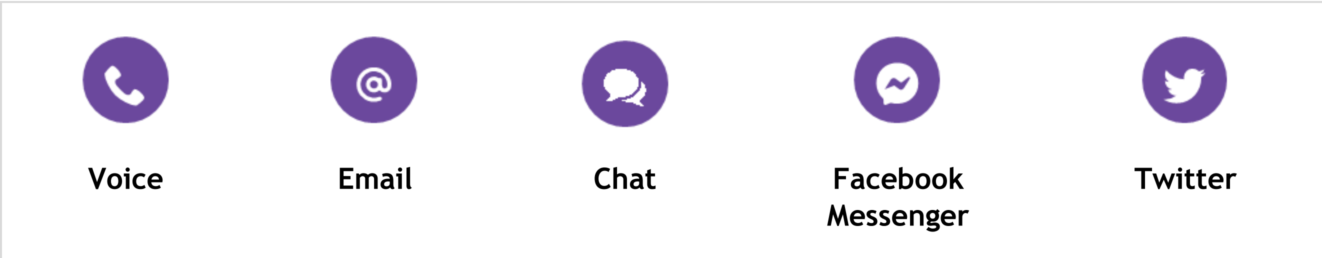
- For an optimal performance, **direct communication** between the browser and ALE Connect web services in the Cloud is recommended. Consequently, please make sure that no component can disturb this communication (example: antivirus, proxy, etc.).
- Communication on the **TCP 443** port (by default) is required between the user’s computer and the ALE Connect web services.

Recommendations

- Some constraints related to the **use of keyboard** or **browser** functions have been noticed.
- It is strongly recommended not to use the following keys or functions when the agent is working on ALE Connect: the **Back** button from the browser, the **Backspace** key, **F5**, **Enter** or the **space bar** (excluding manual entry of a field content).

1.2 License and media

ALE Connect manages the following interaction channels below from a single unified interface.



The use of the license is based on the two articles of the ALE Connect offer:

- The **accesses (Connected Agent)** represent the number of users simultaneously logged in to ALE Connect. They are divided into two pools: one reserved for V.I.P. users (coordinators or supervisors) and the other accessible to all. For each "Connected Agent" article purchased, a token will be systematically provisioned in the ALE Connect license. This token corresponds to the use of the voice media. An additional access is added free of charge to the ALE Connect license to allow a coordinator to be logged in to the web configuration interface.
- The **tokens (Interaction Channel)** represent the number of media that a user can write to. They are divided by business units, then for each of them into two pools, one reserved for V.I.P. users and the other accessible to all.
  Example: an agent with read/write rights to 1 or more Voice queues and 1 or more Email queues. At login, the agent will consume 1 access and 2 tokens. The number of tokens available in the ALE Connect license will be the sum of the "Connected Agent" and "Interaction Channel" articles.

Warning: depending on the offer acquired, some functionalities described in this documentation may not be available on your interface. This is particularly the case if the subscription is only for the "Connected Agent" article. In that case, only the voice media will be available.

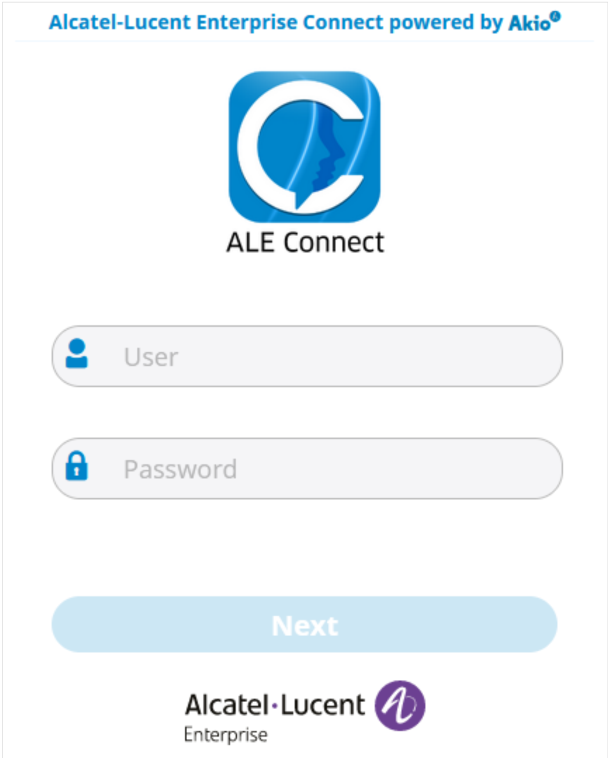
1.3 Logging in to ALE Connect

The login to the software is mandatory. It defines your access permissions based on your profile. The login errors are identified and a message informs you if the login and/or password is incorrect.

1.3.1 Login

1. Enter the **URL address** of the application in the browser of your computer.

   The login page is displayed:



2. Enter the user **login** and the **password** assigned to you.

   Warning: these fields are case sensitive.

3. Click **Next**.
4. Enter the **phone number** of the device you are going to use. Spaces are not authorised and will be automatically removed.
5. Select your **processing group**.
6. Click the **Login** button: the interface is displayed.

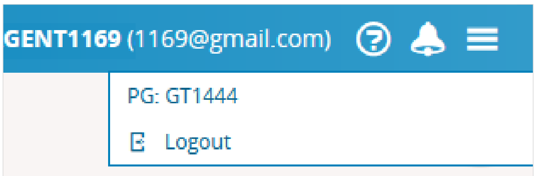
   The access to the different functionalities depends on your profile.

1.3.2 Logout

You must log out properly when your working session is over. Indeed, your login is the starting point to build the statistical data of the day. The logout corresponds to their closing. If you forgot to log out the day before, do it as soon as you arrive before opening a new session. Closing the web browser is not considered as a logout.

1.3.2.1 Manual

1. Click the **Parameters** menu (☰) in the right upper corner of the application.
2. Click **Logout**.



1.3.2.2 Automatic

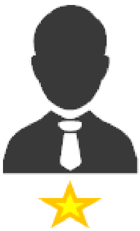
ALE Connect can log you out automatically:

- after a certain **period of inactivity** defined by the administrator. Your session is then expired.
- when a user **logs in under your identity**. Indeed, only one simultaneous login by user is authorised.
- when you are **voluntarily logged out** by an administrator or another coordinator.
- when your **coordinator role is removed** by an administrator or another coordinator.
- when your **supervisor role is removed** by an administrator or another coordinator.

1.4 User profiles

Each person who logs in to ALE Connect is a user who must be identified by a **login** and a **password**. This user has a **profile** set up by the coordinator, determining the scope of his/her activity and the tasks that he/she is authorised to perform.

Depending on their profile, users have different rights and accesses. ALE Connect distinguishes 2 profiles:



Supervisor

Responsible for one or more groups of agents, he/she often combines the roles of agent and supervisor.

His/Her tasks are to manage the activity and follow up his/her agents on a daily basis.

To do this, he has access to realtime supervision functionalities provided by the platform: dashboards, reporting tool, etc.

Agent

His/Her function is to process interactions (calls, emails, etc.) with contacts, according to his/her read and write rights on the corresponding queues.

He/She has skills on which the system relies to distribute interactions.

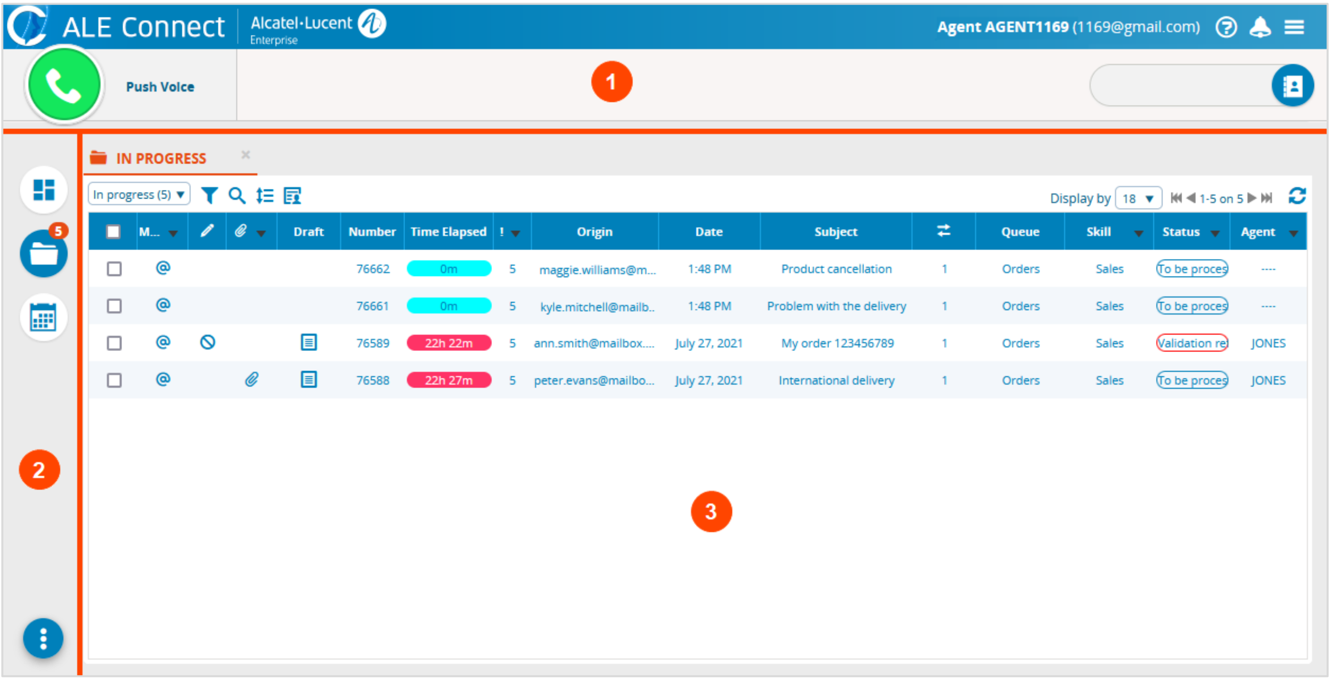
He/She is part of a group from which he/she inherits permissions.

He/She has neither access to the administration interface, nor to the supervisor functionalities of the agent interface.

2 Getting started

2.1 My ALE Connect interface

Its design is intentionally clean to favour a clear display, in order to facilitate the work of all collaborators of the contact centre.



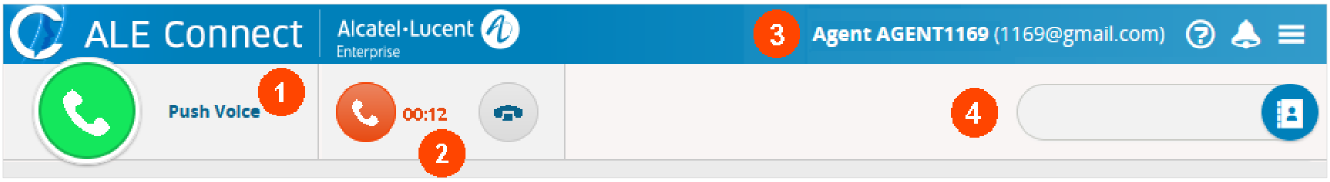
1 Banner

2 Taskbar

3 Workspace

2.1.1 Banner

Located in the upper part of the interface, it is permanently displayed:



1 Choice of the operational status

2 Voice / Chat / Facebook Messenger / Twitter remote control*

3 Help (?) | Notifications (🔔) | Parameters (≡)

4 Entering a number to perform an outbound call

* Displayed only while the interaction is being processed

2.1.2 Taskbar

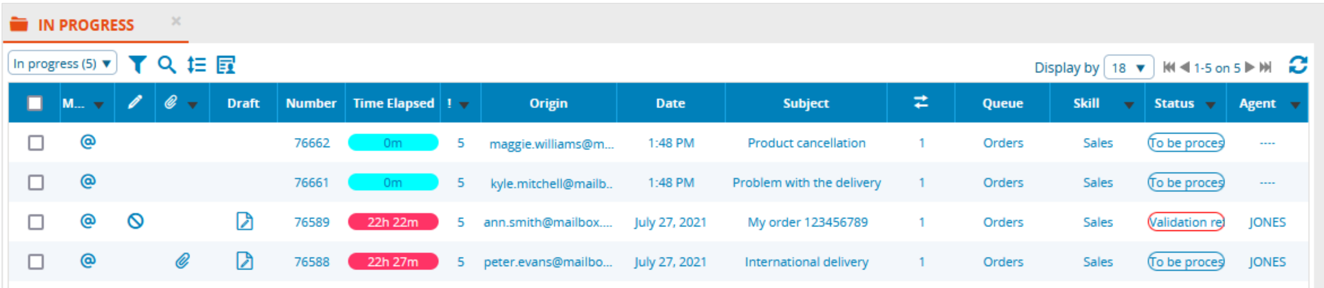
This vertical button bar, located to the left of the interface, allows you to:

- View the personal activity dashboard
- Display the list of folders
- Display your calendar
- Display the hidden buttons
- Send a spontaneous email
- Search a contact
- Create a contact
- Create a folder for a new contact

2.1.3 Workspace

Occupying most of the screen, this area allows you to process interactions and to manage your folders. **The workspace is designed to be multitasking**: each opened functionality is displayed in a new independent tab. You can open until **10 tabs maximum** (desktop, folder, etc.) and thus perform several tasks simultaneously.

In the example below, the agent is viewing the list of folders in progress, while writing a reply to a contact request sent by email:



The **current tab** is always displayed in **red**, to distinguish it from the others.

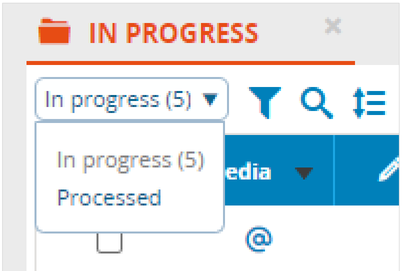
When the opened tab corresponds to a **folder**, it shows an icon illustrating the media of the interaction, the folder number and a button to close the tab (optional). If this is **another functionality**, the tab name clearly indicates the task in progress (example: folder creation).

2.2 Desktops and folders

A desktop is a working directory where folders are stored (like a mailbox), regardless of the type of interaction. By default, the desktop presenting the list of folders in progress is displayed when ALE Connect is opened.

2.2.1 About desktops

The desktops are predefined by the system. You cannot create or customise them. Their content depends on the filters that have been applied, the queues and the read and write user rights. All desktops are presented according to the same template, i.e. as a list of folders with the total number indicated in parentheses, after selection.



In progress

Displayed by default at your login, this desktop presents the list of folders for email, Facebook Messenger or Twitter interactions that are currently being processed for all agents. However, voice or chat folders in progress do not appear.

Processed

This desktop allows you to view the folders that have already been processed by all the agents. They can no longer be modified. However, if necessary, it is always possible to reactivate a folder. In that case, the folder returns to the list of folders in progress, so that the agent can resume its processing. To avoid an excessive number of pages, the desktop only displays the folders whose last action was performed within the last 30 days. A search must be performed to find any older folder.

2.2.2 List of folders

No matter which desktop you choose, the list always looks the same: it is a table for which each row corresponds to a folder. You can read the subject of a folder, without having to open it, by moving the mouse cursor over the corresponding column (tooltip), or by displaying the last message of the folders from the selected desktop.

Warning: the list template, used by all desktops, can be customised (columns, sorting, display order, etc.). We invite you to contact your administrator for further information.

	M...			Draft	Number	Time Elapsed	!	Origin	Date	Subject	⇄	Queue	Skill	Status	Agent
☐	@				76662	0m	5	maggie.williams@m...	1:48 PM	Product cancellation	1	Orders	Sales	To be proces	----
☐	@				76661	0m	5	kyle.mitchell@mailb..	1:48 PM	Problem with the delivery	1	Orders	Sales	To be proces	----
☐	@	⃠		▤	76589	22h 22m	5	ann.smith@mailbox....	July 27, 2021	My order 123456789	1	Orders	Sales	Validation re	JONES
☐	@		📎	▤	76588	22h 27m	5	peter.evans@mailbo...	July 27, 2021	International delivery	1	Orders	Sales	To be proces	JONES

Checkbox

Allows to select a folder for an action.

Media

Icon representing the media associated with the folder. It corresponds to the type of interaction (voice, email, Facebook Messenger or Twitter) of the queue to which the folder is attached.

Notes (✎)

Displays an icon when the folder has at least one note.

Attachments (📎)

Displays an icon when the folder has at least one attachment.

Draft

Displays an icon (▤) when a draft reply has been saved for the folder. When opening it, the draft is displayed as saved.

Number

Unique ID of the folder, automatically assigned by the system when it is created.

Deadline

In progress desktop: number of days since the last message was received.
Processed desktop: number of days between the folder creation and its closing (= Closing date - Creation date).
The deadline is indicated by a colour. The coordinator can set up a colour chart of 5 colours maximum representing 5 time intervals.

Number	Time Elapsed	▲▼
6868	0m	5
7548	3h 40m	5
6994	20h 19m	5
2346	6d 20h	5

Warning: in some cases, the deadline can be reset to 0 (folder reactivation, folder sent to an expert, etc.).

Priority (!)

This is the processing priority of the folder from 1 to 5; 1 being the highest and therefore the most urgent. By default, at login, folders are sorted in ascending order of priority, then in equal priority from oldest to newest date.

Origin

This information varies with the media of the interaction:
Voice: caller's email address if a contact sheet has been associated with the conversation and if the email address was entered there. If the contact is not identified in the database, the origin is empty.
Email: email address of the message sender.
Chat: web user email address if a contact sheet has been associated with the conversation and if the email address was entered there.
Facebook Messenger: Facebook pseudo.
Twitter: name of the web user's Twitter profile.

Date

Date in words of the last message related to this folder, or of the last action performed. If it is today's date, the time is displayed.

Subject

Message subject entered by the sender when it is an email. For voice and chat folders, a default description is assigned to the folder and can be modified when it is processed. For a Facebook Messenger interaction, this is the brand page ID followed by the last and first name of the web user on Facebook. If no subject has been specified, the column then indicates a series of dashes. When you hover over the subject, a tooltip displays the message body.

Number of exchanges (⇄)

Total number of exchanges that occurred during the folder processing, with the contact.

Queue

Name of the queue associated with the folder.

Skill

Name of the skill associated with the folder.

Status

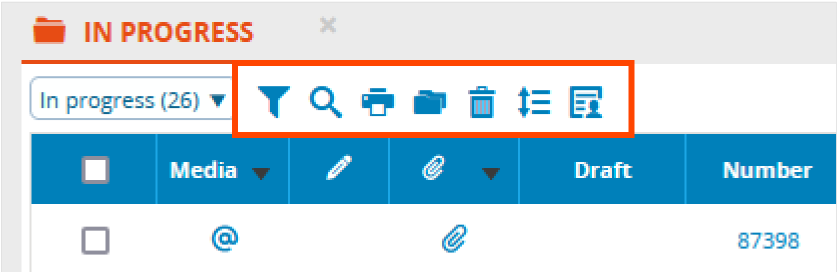
Current status of the folder.

Agent

Name of the agent assigned to process the folder. If this folder has not yet been assigned to an agent, a series of dashes is displayed "----".

2.2.3 Action bar

The action bar is located just above the list of folders:



Filter the list of folders

Search folders

Print folders

Group folders for a simultaneous action

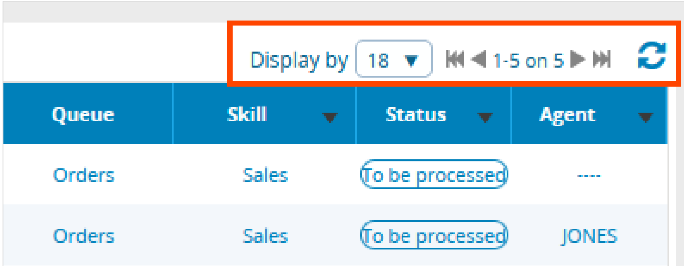
Delete folders

Display the last message received for each folder

Display the standard/custom list of folders

2.2.4 Browsing bar

Regardless of the current desktop, a button bar is always present above the list of folders for quick navigation:



18 ▼	Allows to select the number of folders to display per page.
⏮	Displays the first page of the list.
◀	Displays the page before the current page.
1-5 on 5	Interval of folders displayed in the current page compared to the total number of folders.
▶	Displays the page following the current page.
⏭	Displays the last page of the list.
	Refreshes the data from the list.

2.3 My operational status

It shows in real time what you are doing, while communicating your availability to other logged in users. It is indicated by a round icon and a description specifying the task performed. Each status allows you (or prohibits you) to perform certain actions such as processing an incoming call.

When you log in to ALE Connect, a default operational status is assigned to you (Unavailable). You can change your status at any time, except when an interaction has been pushed to you by the system. ALE Connect takes into account your current status to distribute the interactions.

ALE Connect memorises the login times for each status, over different periods. They can be viewed by the supervisors through detailed analysis reports.

Warning: the statuses, their name and the authorised actions are predefined by the coordinator.

2.3.1 Colour legend

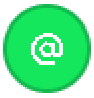
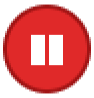
By default, the icon has a different colour depending on whether in the current status you are considered busy or not:

You are available to process interactions.

You are busy with additional tasks which do not allow you to process interactions.

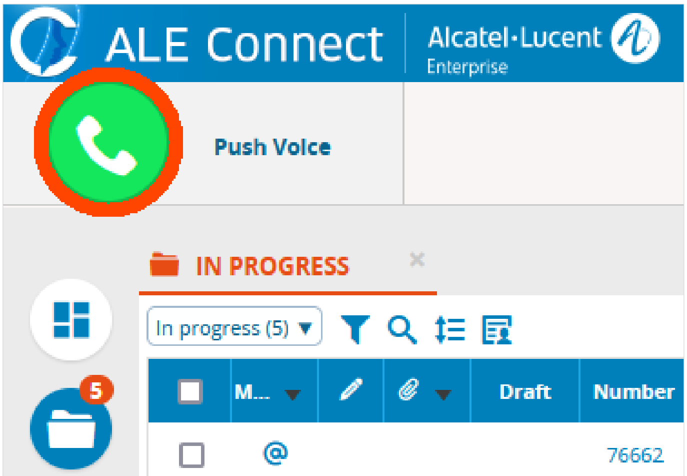
You are considered as unavailable to process interactions.

2.3.2 Available statuses

Status name	Icon	What you can do
Pre-assigned		Particular status you may find yourself in temporarily, when your supervisor changes your processing group. This status displays a grey circle to indicate that you should wait until the operation is complete.
Push Chat		You can only process chats distributed by ALE Connect. Nevertheless, you remain free to process other folders at the same time in pull mode (emails, Facebook Messenger or Twitter interactions) or to perform an outbound call.
Push Email		You can only process emails distributed by ALE Connect. Nevertheless, you remain free to process other folders at the same time in pull mode (emails, Facebook Messenger or Twitter interactions) or perform an outbound call.
Push Voice		You can only process calls distributed by ALE Connect. Nevertheless, you remain free to process other folders at the same time in pull mode (emails, Facebook Messenger or Twitter interactions) or to perform an outbound call.
Unavailable		You are temporarily out of the distribution. Indeed, the distribution of interactions in push mode stops. It restarts when you change your operational status. This status is assigned by default when you log in. When your status is Unavailable, you remain free to process other folders at the same time in pull mode (emails, Facebook Messenger or Twitter interactions) or to perform an outbound call.
WrapUp		This temporary status allows you to momentarily interrupt the distribution of interactions in push mode to allow you to finish an additional task. The duration in manual wrap-up status is limited depending on the configuration. In all cases, this status is displayed following a manual action by you on your phone device. When your status is WrapUp, you remain free to process other folders at the same time in pull mode (emails, Facebook Messenger or Twitter interactions) or to perform an outbound call.

2.3.3 Choose your operational status

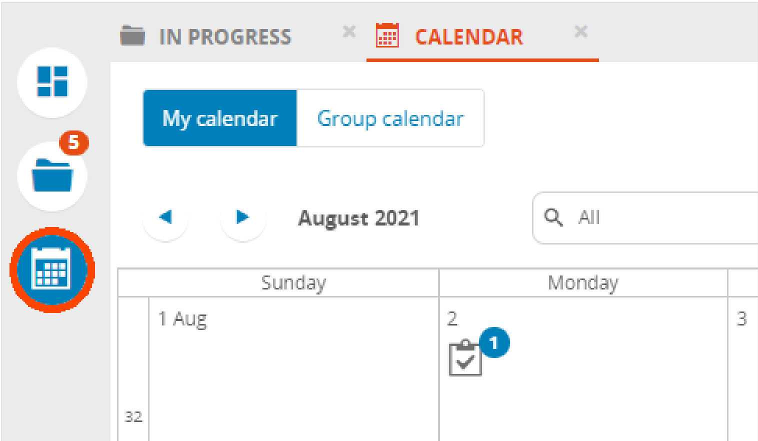
1. In the left upper corner of the screen, click the **icon** of the operational status:



2. Select an **operational status** from the list. This choice will condition the distribution of interactions and the tasks that are authorised to you.
3. Your status is immediately updated: only the actions authorised by this new status will be possible both on ALE Connect and your phone device.

2.4 My calendar

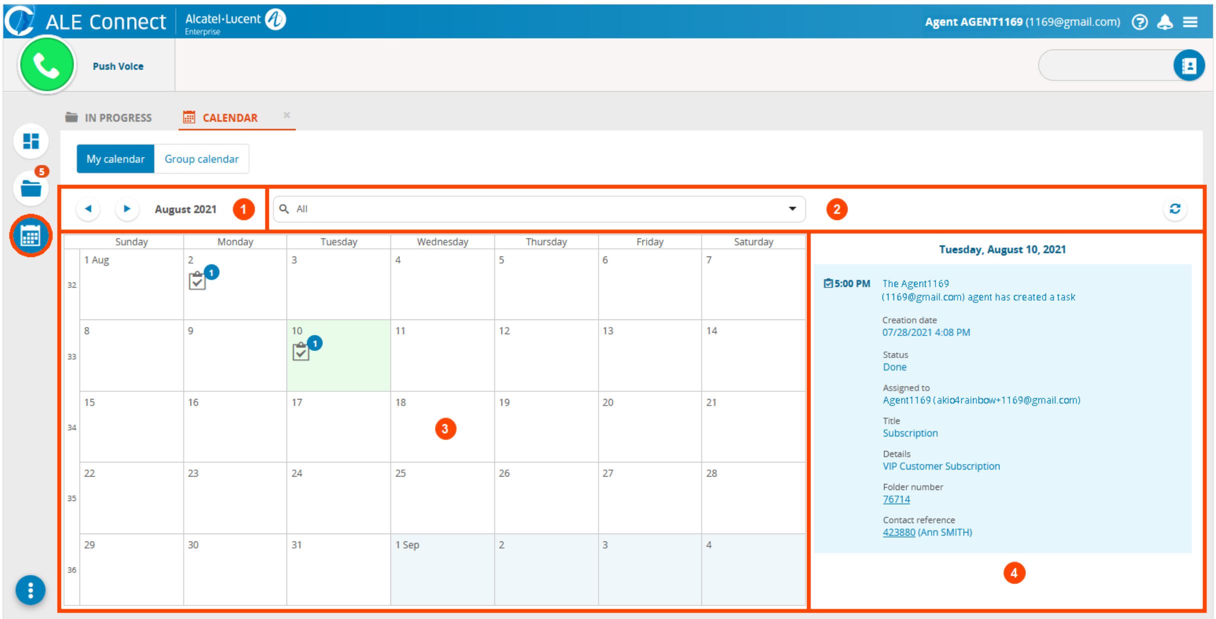
From the taskbar of your ALE Connect interface, you have access to a calendar. This allows you to manage your personal tasks. Your supervisor will be able to see them, but not the agents in your group. Note that the calendar can be opened/used independently of your other current tasks on ALE Connect.



Warning: the **Group calendar** tab is not available although it is displayed.

2.4.1 Accessing your calendar

1. Click the **Calendar** button () in the taskbar.
2. Click the **My calendar** tab if it is not displayed by default.



The calendar displays by default the events scheduled for the **current month** (1). Click the arrows to view previous or upcoming months. The current date is indicated by a green box as a reference point. If you click another date, it becomes red.

You can choose the events to be displayed by applying **filters** (2). The **calendar** (3) is then automatically updated. The number of events remaining to be processed per day is shown in a blue bubble.

On the right of the calendar, you can see the details of **events** (4) scheduled for the selected date.

Note: the calendar is not automatically refreshed. Do not forget to click the **Refresh** button ().

2.4.2 Filtering the calendar

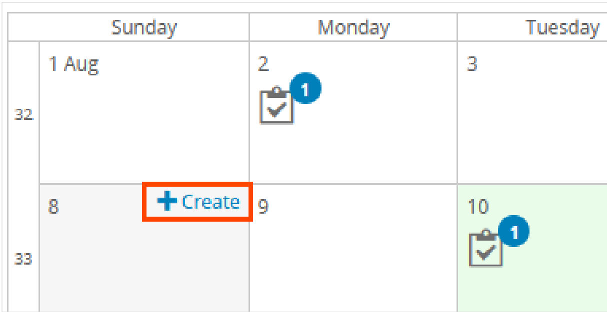
You can choose the events to display in your calendar. After selecting one or several filters, the calendar is automatically updated. The applied filters are memorised by ALE Connect, when you switch from one view to another in the calendar.

1. Click the **Calendar** button () in the taskbar.
2. Click the **My calendar** tab if it is not displayed by default.
3. Click the search area ().
4. Check the events you wish to display in the calendar.

   The calendar is automatically refreshed.

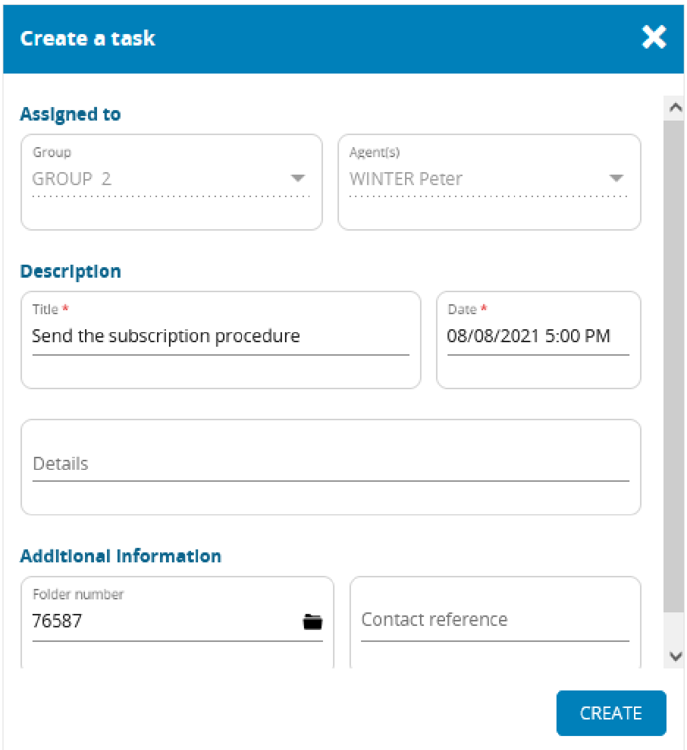
2.4.3 Creating a task

1. Click the **Calendar** button (▦) in the taskbar.
2. Click the **My calendar** tab if it is not displayed by default.
3. Select the corresponding month.
4. Hover over the desired date and click **Create**.



5. Enter a short **description** of the task (255 characters maximum).
6. Enter the **date** and **time** of the scheduling.

   It can be past, present or future.



7. Enter a long description (4000 characters maximum).

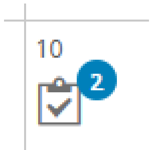
8. Fill in the **ALE Connect folder number** and/or the **contact reference** associated with this task.

   You can check the folder exists by clicking the 🖿 button: the folder is opened in a new tab.

   Warning: if the folder number or contact reference does not exist, the task cannot be saved.

9. Click **Create** to save your entry.

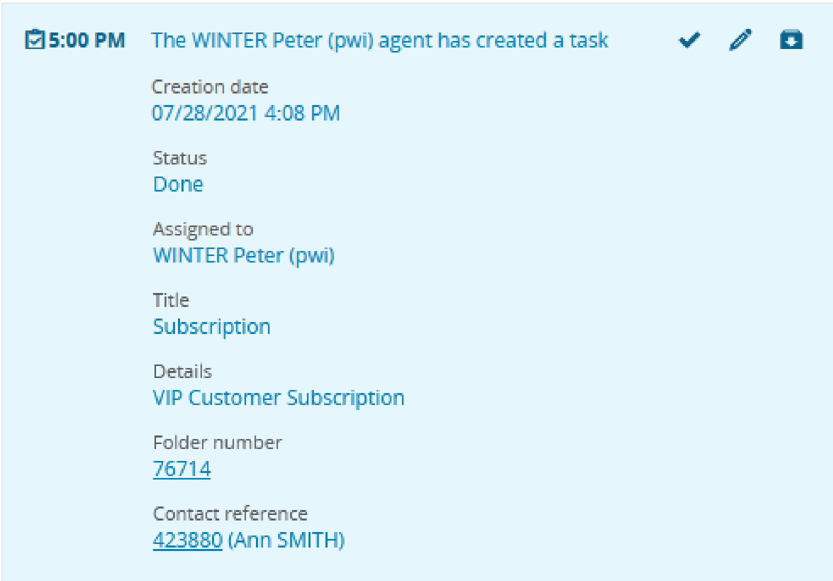
   The task is automatically added to your calendar:



2.4.4 Viewing the details of a task

1. Click the **Calendar** button () in the taskbar.
2. Click the **My calendar** tab if it is not displayed by default.
3. Select the corresponding month.
4. Click the desired date (past, present or future).

   To the right of the calendar, you can view the **details of all tasks** () scheduled at the selected date:



From this screen, it is possible to:

- view the folder by clicking its number

- view the contact sheet by clicking its reference

- change the status of the task

- modify the task

- archive the task

2.4.5 Modifying a task

1. Click the **Calendar** button () in the taskbar.
2. Click the **My calendar** tab if it is not displayed by default.
3. Select the corresponding month.
4. Click the desired date (past, present or future).
5. Hover over the task you wish to modify then click **Modify the task** ().
6. Edit the information you wish to change.
7. Click **OK** to save your entry.

   The task is automatically updated in your calendar.

2.4.6 Indicating that a task has been completed

A task can have 2 statuses: To do or Done. By default, every new task added to your calendar is to be done. This action allows you to indicate with a single click that it is complete. On the contrary, you can change it back to the To do status in the same way.

1. Click the **Calendar** button () in the taskbar.
2. Click the **My calendar** tab if it is not displayed by default.
3. Select the corresponding month.
4. Click the desired date (past, present or future).
5. Hover over the affected **task** then click **Change the task status** (✓).

   The task is now complete (✔).

2.4.7 Archiving a task

This action allows you to manually close a task (obsolete for example): you consider that it has been processed in one way or another, or that it is no longer useful. After confirmation of the archiving, the task disappears permanently from your calendar. You can no longer retrieve it.

1. Click the **Calendar** button () in the taskbar.
2. Click the **My calendar** tab if it is not displayed by default.
3. Select the corresponding month.
4. Click the desired date (past, present or future).
5. Hover over the affected **task** then click **Archive the task** ().

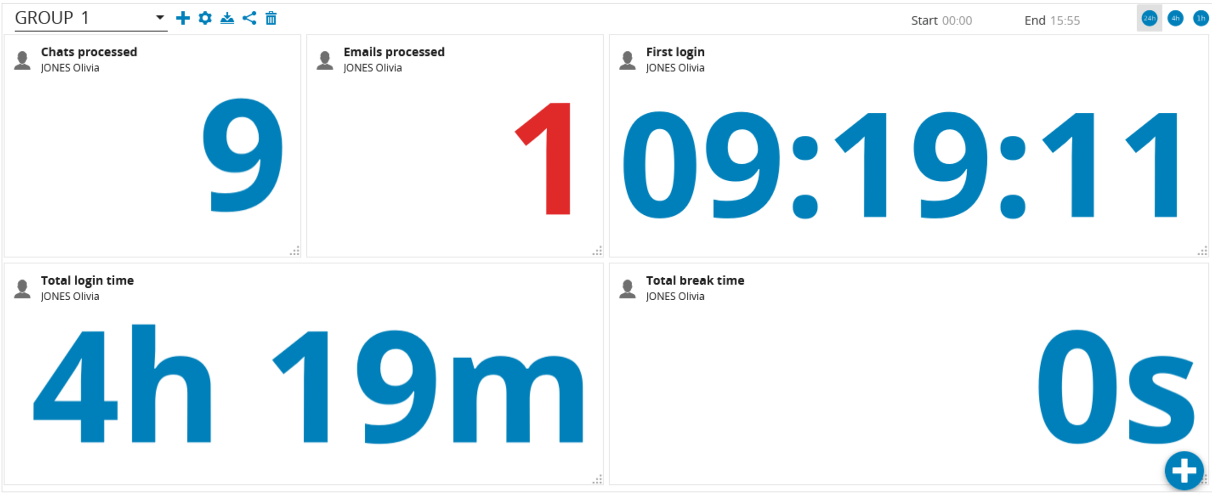
   The task is archived and disappears from your calendar.

2.5 My activity in real time

During your working session, a dashboard allows you to follow your personal statistics in real time. This dashboard presents various indicators, in the form of widgets displaying either a single value, a graph or a table. Their counting starts at your login to ALE Connect and stops when you log out. The activity dashboard is the same for all agents in the group you belong to.

Warning: as the dashboard is designed by the supervisor, we invite you to contact him/her for any questions.

1. Click the **My activity** button ( ) in the taskbar.
2. The dashboard is displayed in a new tab of your workspace:



If **your dashboard contains at least one line chart type graph**, you can choose the default display period of data. Simply click the button corresponding to the desired **viewing period**: 24h, 4h or 1h.

ALE Connect updates the data for all curves and displays them for the requested period. The start and end times are recalled for reference.

2.6 My notifications

When certain events occur or are scheduled in ALE Connect, a notification is displayed to inform or alert you.

2.6.1 Viewing my history of notifications

Here you will find notifications about events that have occurred during your activity, whether you are logged in or not. For example, a task that you have scheduled in your calendar and that was notified to you the day before. However, done or archived tasks will not be notified.

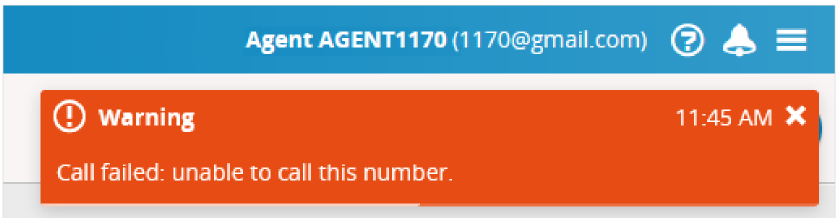
1. Click the 🔔 icon at the top right of your ALE Connect interface.

2. Click the **View** link to see the details of the event.

2.6.2 Viewing a notification in real time

Automatically generated, these notifications are displayed at the top right of your ALE Connect interface, under the general parameters menu. Depending on the nature of the information, they are displayed temporarily (5 seconds) or permanently (the notification remains displayed until it is manually closed).

1. A particular event generates a notification. It is displayed in the **top right corner** of your interface:



   There are 3 types of notification. The colour reflects the importance of the message being notified:
   - **Information** on white background (e.g. task in the calendar that is coming to an end)
   - **Warning** on orange background (e.g. failed outbound call attempt)
   - **Error** on red background (e.g. service interruption)

2. Close the **notification** by clicking the corresponding icon (✖).

2.6.3 Receiving notifications from the browser

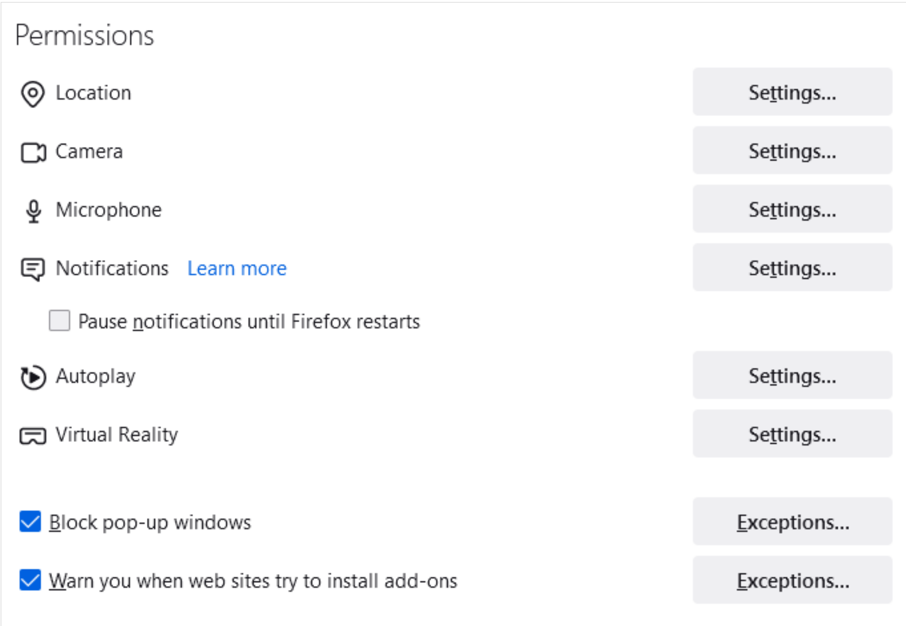
Whenever ALE Connect is not opened in the foreground on your desktop, you have the option to receive HTML5 notifications: they will allow you to always be informed of the arrival of an interaction in push mode, especially if you carry out other tasks outside ALE Connect.

Warning: notifications are only displayed if the active browser tab is NOT the ALE Connect tab.

To set up these alerts, please follow the following procedure:

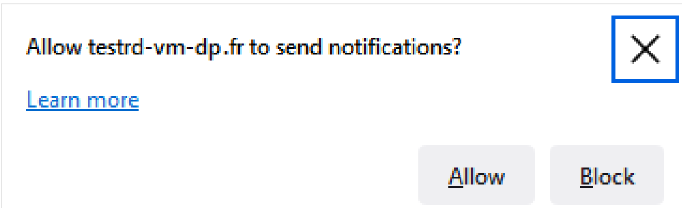
1. Activate the **notification management** in the browser parameters used by ALE Connect (please refer to the documentation of the relevant editors).

   Example with the Mozilla Firefox© browser:



2. Accept to **receive notifications** from ALE Connect.

   Indeed, activation alone is not enough. This request is automatically submitted to you at your login to ALE Connect in the browser:



3. Once activated, the notification is displayed as a message that appears in the foreground of the lower right corner of your screen, as soon as a push interaction is assigned to you:

Its display duration is set up by the coordinator. The notification can be combined with a customised sound, played in a loop, to attract your attention (subject to a setup performed by the administrator).

4. Click the **notification** to bring the ALE Connect browser window to the foreground.

2.7 Entry rules

The interface screens regularly include fields to fill in or free comment areas, for which a value can / must be entered. These must comply with certain principles, regarding the General Data Protection Regulations (GDPR), both in terms of content and form, when it comes to the private lives of individuals.

Therefore, the information provided must not damage the image of the person or prevent him from benefiting from a service to which he/she can claim.

2.7.1 Best practices

You must be vigilant about the content you enter.

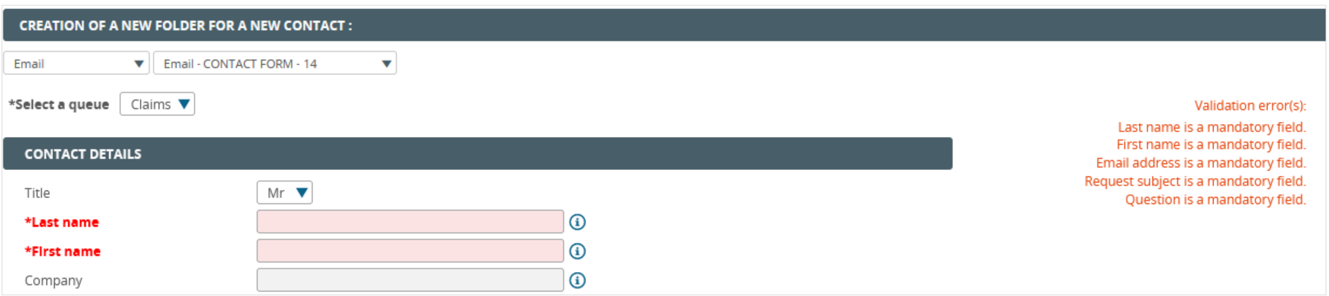
- Save only the data strictly necessary for the processing that you must perform.
- Inform the person about the personal data you must keep about them and the purpose of this action.
- Remember that the data subject has a right of access to this information.
- Be objective, never excessive or insulting.
- Limit yourself to neutral and objective terms when it comes to sensitive data.
- Raise awareness of good practice among users.

CNIL website: Notepad and comment sections: the good reflexes to avoid getting out of hand

2.7.2 Format constraints

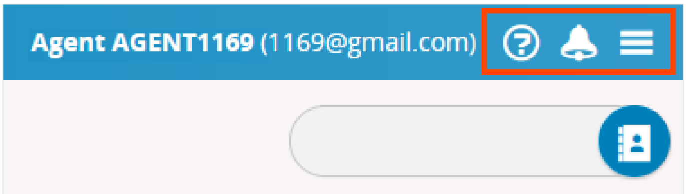
- The accepted format depends on the nature of the field: date, URL address, numerical value, etc.
- ALE Connect checks the value entered in most cases and warns you of an incorrect entry (for example, a case problem).
- The entry requirement is indicated by the * character located on the right of the field name.
- An error message is displayed when the screen is validated if a value entered does not respect the expected format.

Example:



2.8 Help and parameters

In the top right corner of your ALE Connect interface, several icons are displayed to the right of your username and profile:



They allow you to access the following menus:

Help

Notifications

Parameters

2.8.1 Help

The **Online help** menu gives you direct access to the ALE Connect online help. It is then displayed in the internet browser of your computer.

Advise: a display with 100% zoom is recommended for optimal rendering.

The **About** menu displays a window indicating the current version of the ALE Connect platform. This information can be useful in the context of version update, operating procedures or if you contact the customer support.

2.8.2 Parameters

This menu displays:

- the **processing group** to which you belong,
- a menu to log out from the application.

3 Distribution of interactions

3.1 General principles

The distribution of interactions is automatic and managed by the ALE Connect application, according to multiple criteria defined by the administration and/or the coordinator.

Furthermore, a processing priority from 5 to 1 is assigned to each email interaction (1 being the highest level). The assignment of these interactions is performed first according to priority and then, with equal priority, according to waiting time in queue.

However, for chat interactions, it is possible to set up specific behaviours through work equity rules implemented by the coordinator.

3.2 Push/Pull modes

ALE Connect distinguishes two working methods:

- **Push mode**: ALE Connect automatically distributes the interaction to you, without you having to do anything. It is said to be “pushed” by the application. A pop-up window then appears in the lower right corner of your workspace. A sound can also be played when an interaction arrives (optional subject to setup performed by the administrator): it allows you to draw your attention when you are not at your computer but close to, or when you are working on another application or another tab than ALE Connect.
- **Pull mode:** you must select manually the interaction to be processed from one of the available desktops.

Each realtime queue in which interactions are directed, as they arrive, is configured to be either in push mode or in pull mode. However, depending on the associated media, both modes are not always available:

	Media	Push	Pull
	Voice	✓	No
	Email	✓	✓
	Chat	✓	No
	Facebook Messenger	No	✓
	Twitter	No	✓

The Voice and Chat interactions need to be processed in real time by an agent, i.e. as soon as the interaction is distributed by the ALE Connect application. This is why it is not possible to process them in pull mode. On the contrary, the Facebook Messenger and Twitter interactions can only be processed in pull mode.

Note: the operational statuses available on your interface to process calls, emails and chats are in push mode.

3.3 ALE Connect application freeze

Your ALE Connect interface can be frozen when you have ignored several successive pop-ups signalling the arrival of an interaction (example: you take a break forgetting to change your operational status). Ignoring means neither accepting nor refusing the interaction presented. When the maximum number of ignored interactions is reached (configured by the coordinator), your ALE Connect application is automatically frozen. ALE Connect no longer considers you available and stops distributing interactions to you. This prevention is to avoid unnecessary distribution.

Warning: even if your ALE Connect interface is frozen, you can still be reached for private calls.

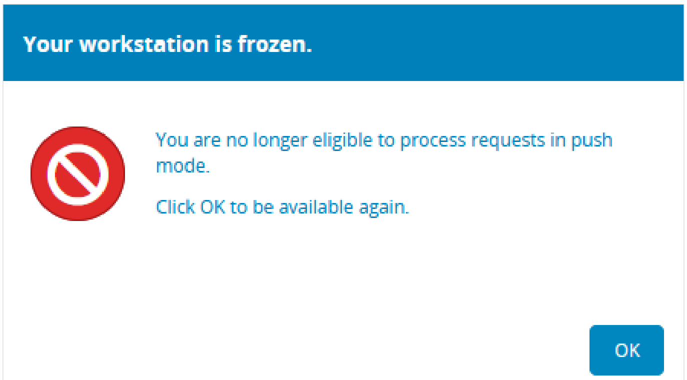
3.3.1 Interactions taken into account

The ALE Connect application freeze counts the following ignored interactions:

- chat conversations,
- emails distributed in push mode.

3.3.2 What you see on screen

When the ALE Connect application freeze is triggered, a message is displayed on the screen:



You must then click **OK** to be able to receive interactions in push mode again (chats for example).

4 Phone calls

The ALE Connect telephone system module allows you to handle incoming calls, from contacts or internal collaborators (agents, supervisors) or outbound calls.

It includes:

- an engine that distributes intelligently calls,
- presentation of calls to the agent,
- put on hold of a call,
- second call handling,
- call transfer,
- generation of outbound calls,
- traceability and qualification of each call.

4.1 Supporting an incoming call

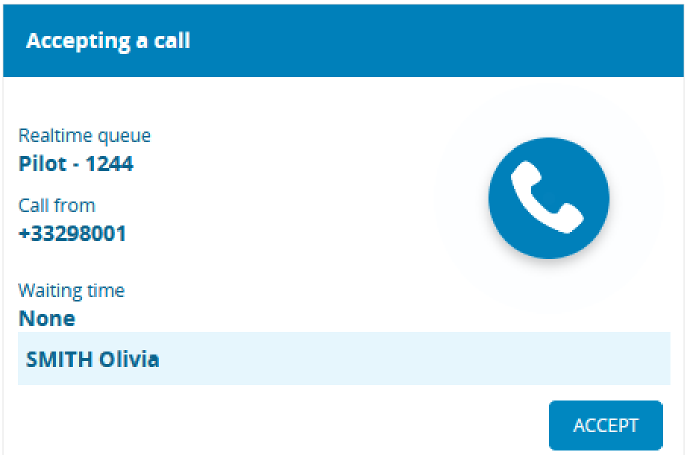
When a person calls the contact centre, ALE Connect selects the agent to be called for the connection. The call distribution is automatically performed, depending on the availability of the agents.

For this purpose:

- Your current operational status allows to support incoming calls (Push Voice).
- Your phone number is operational.

4.1.1 Supporting an ACD call

1. When the call is distributed to you, a **pop-up window** is automatically displayed in the lower right corner of your interface. It can be combined with a customised sound, played in a loop, to attract your attention (subject to a setup performed by the administrator).



It allows you to know:

Realtime queue
Pilot number and name in which the incoming call is stored.

Call from
Phone number of the caller. If masked, it is not visible.

Waiting time
Total waiting time that cumulates the waiting times before the call is distributed to an agent.

Last name / First name
Last name and first name of the correspondent if identified in the contact database.

Note: if the caller hangs up the phone while the pop-up is displayed, it is automatically closed.

2. When the pop-up window is displayed, you have 2 possibilities:

   You accept the call. You can either click the corresponding button in the pop-up window or pick up the phone to be connected to the correspondent. Your interface is then modified: the telephone remote control is displayed in the banner and a new folder is opened in a new tab named with the caller phone number. You can now process the incoming call.

   You ignore the call. The pop-up window remains displayed until the call is distributed to another agent with the same rights, who can in turn accept or refuse it.

4.1.2 Supporting a CCD direct call

You receive a call, external or internal, directly on your agent phone number. Unlike the ACD call, this type of call is technically routed differently (it does not go through the OXE distribution matrix). Apart from this technical difference, the support of the call is the same as an ACD call.

4.1.3 Supporting a private call

An internal or external contact person calls you privately. The support is the same as an ACD call. The only differences are the following:

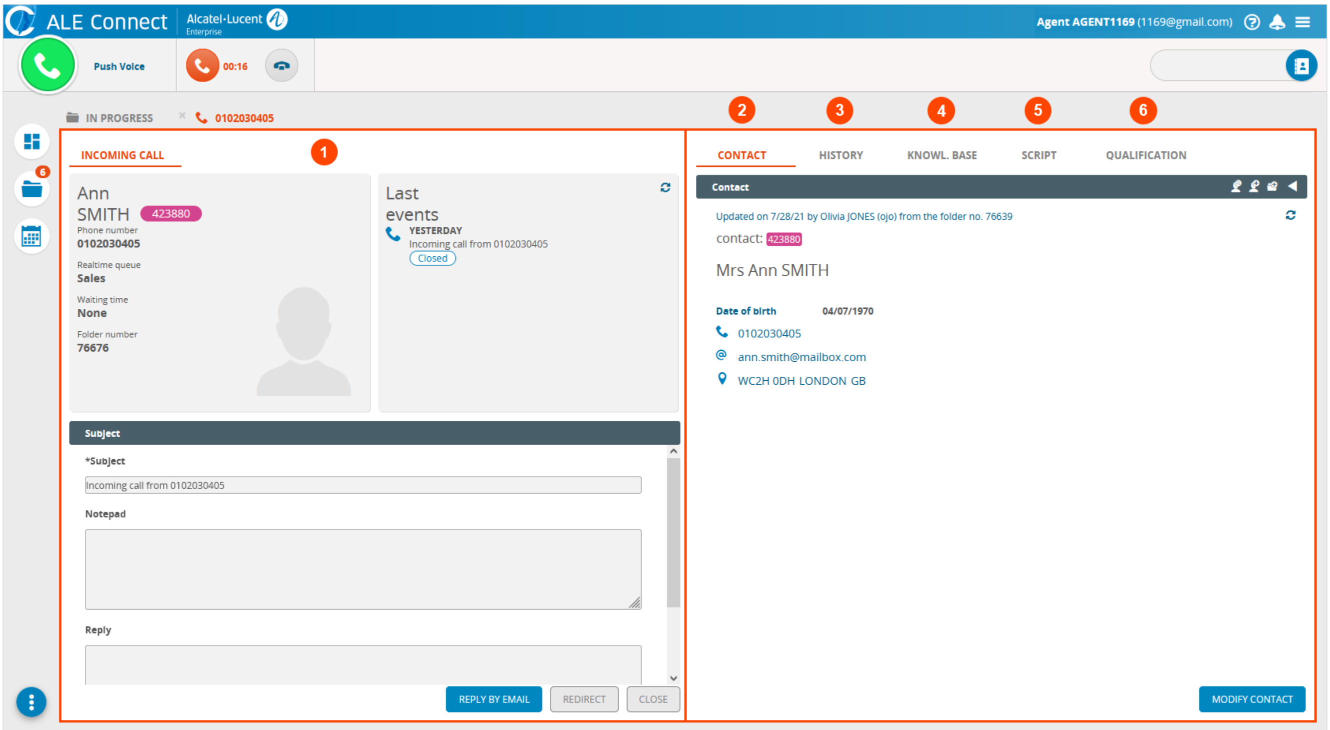
- The pop-up window displays only the caller’s information with his/her phone number if the caller is unknown, with no realtime queue or waiting time.
- In the particular case where a pop-up window indicating the arrival of a chat or an email is already displayed on the screen, the pop-up window of the private call is superimposed on it.
- No folder is created on ALE Connect.

4.2 Introducing the voice folder

When you accept an incoming call, your interface changes:

- A **new tab** is displayed in your workspace: it shows the **phone number** of the caller.
- A remote control is displayed in the banner: its functions are active and allow you to process the current call.
- The remote control and the folder tab are linked: if you click another tab, the remote control is reduced and only the timer is displayed.

4.2.1 Overview



The folder is divided into two vertical parts: on the left, the call processing itself, on the right the assistance functions.

1 Incoming call

2 Contact

3 History

4 Knowledge base

5 Script

6 Qualification

4.2.2 Incoming call tab

It identifies the contact and the folder related to the current call.

General information

Contact
First name, last name and ID of the contact associated with the call, when it exists in the contact database. This information is displayed either because the number has been recognised, or because you have associated the contact during the call. On the contrary, ALE Connect will only display the new ID that will be assigned to the caller after the call is over. A contact sheet will be automatically created at the end of the call.

Phone number
Phone number of the caller (if not masked).

Realtime queue
Name of the realtime queue in which this call has been directed.

Waiting time
Total time elapsed since the call was supported by the system.

Folder number
Folder number automatically assigned by the system to the current call. This folder will only appear in the relevant desktop when the call is over.

Last events

If the contact is identified, this area presents the last 3 events related to him/her for information purposes (emails, previous calls, etc.). If you click an event, the corresponding folder is opened in the **History** tab. Otherwise, this area is empty. The **Refresh** button () allows you to refresh the list.

Call subject

This area allows you to specify the reason for the current call. The data entered in this area is automatically saved at the end of the wrap-up period and will be available in the folder classified in the Processed desktop.

By default, it presents the following fields (see the ALE Connect administrator for customisation):

Subject (mandatory)
By default, this field is filled in with the “Incoming call from ...” value followed by the caller phone number, if the number is not masked. The subject can be modified if necessary.

Notepad
Enter any information you think is useful here. It will be displayed in the notepad of the processed folder. The entry area can be enlarged or reduced at will, by clicking the lower right corner represented by the icon.

Reply
Write the response given orally to the contact, for the record. The area can be enlarged or reduced at will, by clicking the lower right corner represented by the icon. This response will be saved in the history of the folder.

4.2.3 Contact tab

It allows you to identify the contact associated with this call and, if necessary, to update his/her sheet.

Find out more about the tab

4.2.4 History tab

It allows you to view the history of the folders already saved for the contact associated with the current call. This tab is therefore displayed only if the contact has been found in the ALE Connect database. Otherwise, it is hidden.

Find out more about the tab

4.2.5 Knowledge base tab

It allows you to process the folder more quickly, by picking response templates to the issues submitted by the contact. Warning: the attachments eventually associated with a response template are not displayed.

Find out more about the tab

4.2.6 Script tab

It is used to guide the conversation with your interlocutor. This tab is optional: it is only displayed if a script has been set up by the coordinator to process calls of this queue. Otherwise, it is hidden.

Find out more about the tab

4.2.7 Qualification tab

It is possible to qualify the interaction by assigning one or several criteria to it. This tab is only displayed if qualification criteria have been defined for the queue in which the folder is stored. Otherwise, it is hidden.

Find out more about the tab

4.3 Processing an incoming call

You have accepted to support a call (not private) and the folder is now opened on your ALE Connect interface.

4.3.1 If you had tasks in progress

All the tasks in progress at the time you accepted the call remain in progress, and are displayed in one or more separate tabs. You can switch from the current call to another task, by browsing between the different tabs.

When you are in conversation with the focus on the tab, you can always perform the following actions:

- send a spontaneous email to the person of your choice,
- view the list of in progress or processed folders,
- process another folder in pull mode,
- use the taskbar functionalities.

4.3.2 Procedure

1. As soon as you are connected with the contact, the folder is opened in your ALE Connect interface.
2. Follow the conversation script displayed in the **Script** tab.

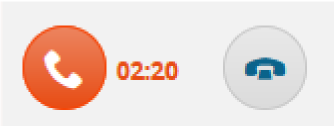
   If no script was provided to you as a support, the tab is hidden: go to the next step.
3. Process the contact's request.
4. When the conversation is over, **hang up your phone** or **click the** corresponding **button** from the remote control.

   If your caller hangs up, the consequence is the same. You are now in wrap-up phase: you can now finalise the processing of the folder.

4.4 Using the remote control

During a call, a remote control is displayed in the interface banner. It is displayed when you are in communication with the caller. The remote control allows you to act on the current call.

A timer is displayed and the function buttons are active:



Button	Function	Display	Use
	Call in progress timed	Permanent	Call duration displayed in real time. The timer countdown starts as soon as you pick up the phone to handle the call. It can never be paused.
	Wrap-up	Only when the call has been hung up	Countdown of the time remaining to finalise the folder. The duration reserved to this task is set up by the administrator.
	Put on hold active	Only when the put on hold has been activated	The caller has been put on hold: the conversation is temporarily suspended.
	Transfer	Only during a second call	Allows you to transfer the current call, during a second call.
	Hang up	Permanent	Ends the conversation by hanging up the current call. You enter the wrap-up phase.

4.5 Ending a call

Simply hang up your handset or click the **Hang up** button ( ) of the remote control.

The **wrap-up** time starts:

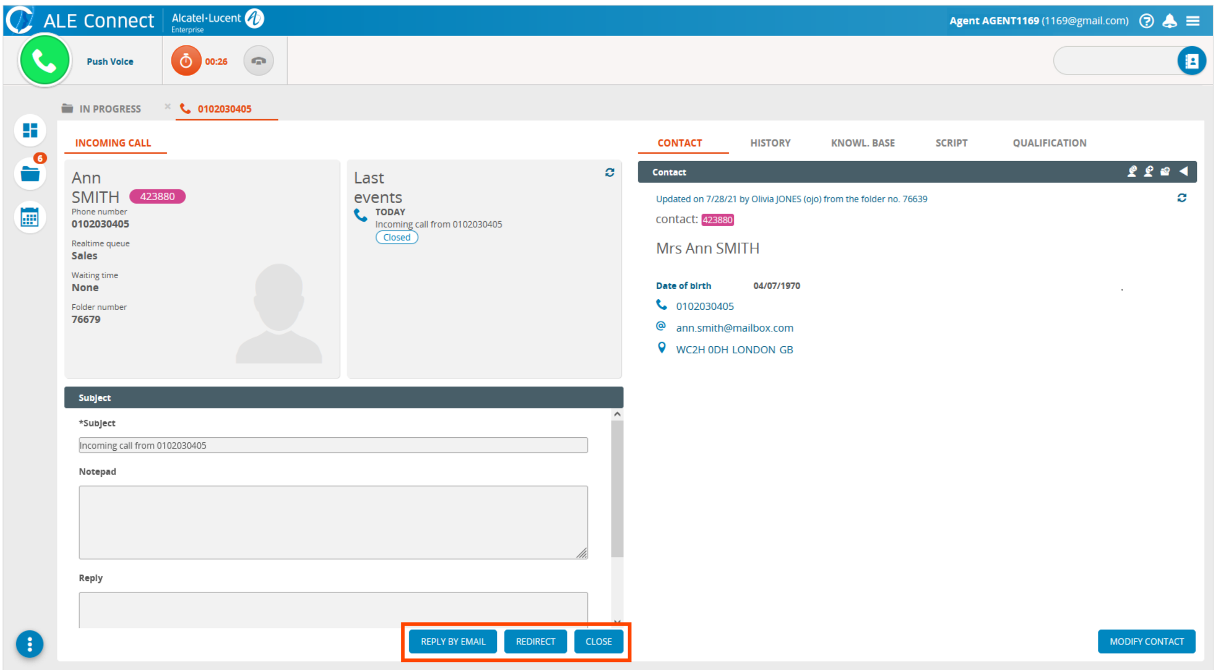
- At the bottom of the screen, several buttons are displayed in the Incoming call tab: you can choose what to do with the folder.
- You remain unavailable to support a new call until the folder is closed.
- Without any action, this tab will be automatically closed at the end of the wrap-up time.
- To close the folder without waiting for the wrap-up time to expire, click the **Close** button from the **Incoming call** tab or hang up your phone.

Once the folder is closed, your ALE Connect interface synchronises with your phone device.

Warning: the setup of the wrap-up is configured on OXE. Please contact the coordinator if you have any questions.

4.5.1 Finalising the folder

1. Click the **Hang up** button ( ) from the remote control.



2. Assign qualification criteria to the folder in the corresponding tab.

   According to the ALE Connect setup, the qualification may be optional. If this is not performed before the end of the wrap-up time, the interaction will be closed without qualification.

3. Click the button corresponding to the desired action:

   Reply by email: allows you to write a reply to the contact's request by sending him/her a spontaneous email. It will be associated by default with one of the email interaction queues to which you have rights. This email will be merged with the folder once closed.

   Redirect: allows you not to close the folder and to modify the queue of the folder. It is possible to redirect the folder to a queue and to another skill if necessary. The redirected folder remains in the In progress desktop. However, it is impossible to redirect the folder to voice or chat interaction queues. If the qualification of the folder is mandatory, the corresponding tab is automatically displayed and you must then fill in criteria to be able to redirect the folder.

   > **Warning**: if no criteria have been defined for the queue linked to the folder, it is redirected without being qualified even if the coordinator has configured the qualification as mandatory.

   Close: allows you to close the folder before ALE Connect does it automatically, when you do not wish to wait for the end of the wrap-up time. If the qualification of the folder is mandatory and you have not yet performed so, ALE Connect automatically displays the Qualification tab. ALE Connect then closes the folder with the Closed status and stores it in the Processed desktop.

4.5.2 The wrap-up time is over

At the end of the wrap-up time, ALE Connect:

- automatically closes the incoming call;
- closes the corresponding tab and hides the remote control;
- validates the creation of the folder then classifies it in the desktop of processed folders.
- creates a contact sheet by retrieving the caller's information, only if no contact from the database has been associated with the call.

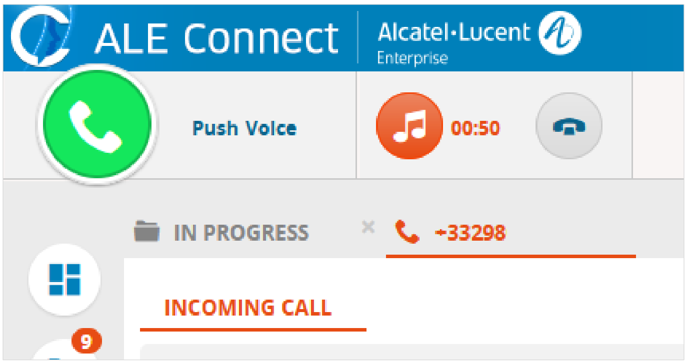
4.6 Putting a call on hold

When processing a call, you have the possibility to put on hold your correspondent from your handset. The conversation is therefore temporarily cut off. The correspondent can no longer hear or speak to you, and vice versa.

This action can be triggered as many times as desired during the call.

4.6.1 Putting a call on hold

1. During the call, trigger the **put on hold** from your phone device.



2. Your correspondent is immediately put on hold. Your remote control changes: the **timer** now displays a musical note.

4.6.2 Resuming a call on hold

1. During the call, exit the put on hold from your phone device.
2. You can resume the conversation with your correspondent.

4.6.3 Callback following a put on hold

If you hang up on a call while it is on hold, ALE Connect will automatically call you back. A pop-up window is displayed on your interface during the phone ringing.

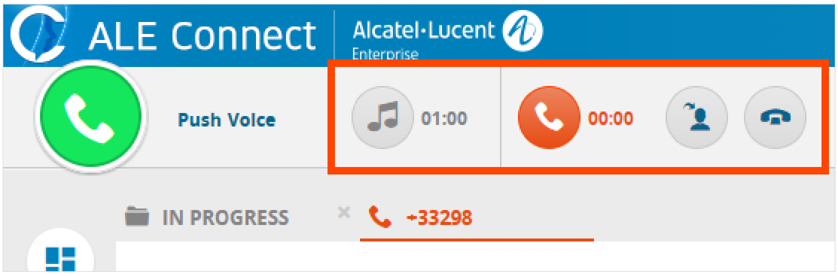
4.7 Handling a second call

During an incoming call or an outbound call (private or not), you have the possibility to perform a second call while keeping the original call to, for example, request assistance from another agent or an external person. You can then start a second call when you are already on a call.

Warning: in the case of two simultaneous calls, a folder and the remote control are displayed only for the first processed call. For the second call handled from the phone device, no folder is created.

4.7.1 Performing a second call to an agent

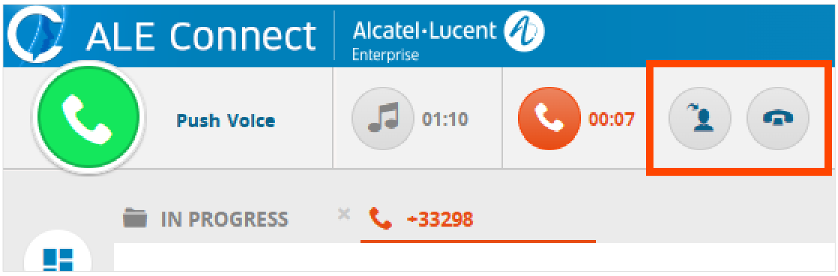
1. From the entry area of your ALE Connect interface, or your phone device, dial the **phone number of the agent** to be called.



   The part to the left of the line corresponds to the initial call that is automatically put on hold.

   The right part of the remote control allows you to act on the second ongoing call.

2. The recipient agent receives your call via a pop-up and **accepts** it: the timer of this second call starts as soon as you are in conversation with the agent.



4.7.2 Performing a second call to a pilot

You are processing an incoming call or an outbound call, and you wish to call another agent on a realtime queue (pilot). The call is then distributed to another available agent chosen automatically. The procedure is the same as the previous one: the only difference is that you have to dial the pilot number instead of the agent number.

4.7.3 Stopping a second call

The second call is over when:

- you click the **Hang up** button from the remote control,
- you hang up the phone either by pressing the corresponding key of your phone device, or by hanging up the handset,
- the consulted agent ends the call on his/her own (by the same methods).

You automatically switch back to the initial call, which is still put on hold.

4.8 Transferring a call

You have the possibility to transfer an incoming call or an outbound call, private or not, anonymous or not, to the recipient of your choice.

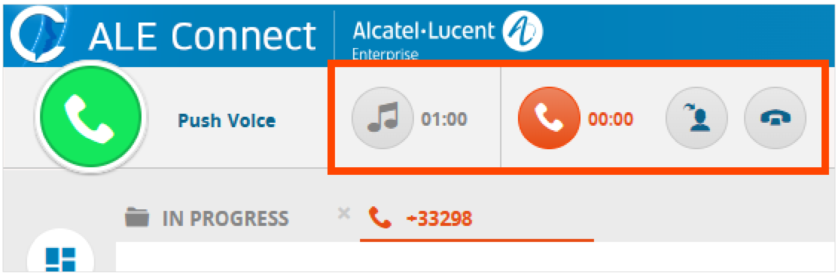
4.8.1 Transferring a call to an agent

You wish to transfer a call to another agent of your choice. The contact is put on hold during the transfer procedure. The corresponding folder will be transferred with the call.

4.8.1.1 Transfer while ringing

This action consists in transferring directly the call to an agent of your choice, without waiting for his/her answer. After confirming the transfer, you lose control of the correspondent whether the transfer was successful or not.

1. From the entry area of your ALE Connect interface, or your phone device, dial the **phone number of the agent** to whom you wish to transfer the call. The contact is then put on hold. A second remote control is displayed on your interface:



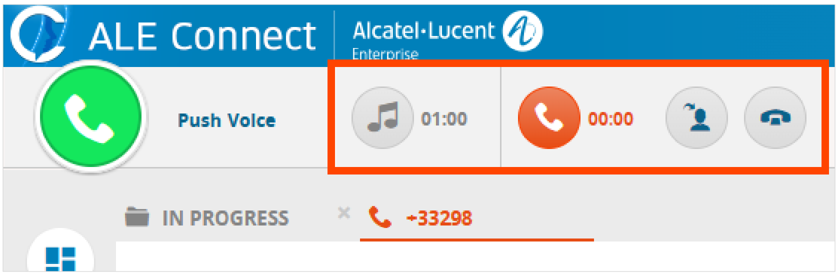
2. The recipient agent receives your call via a pop-up. Without waiting for the agent's reply, confirm the transfer by clicking the **Transfer** button () from the remote control or by pressing the corresponding key of your phone device.

   The call and the corresponding folder are transferred to the agent. The agent is then free to accept or refuse the transferred call. On your ALE Connect interface, the remote controls and the folder disappear.

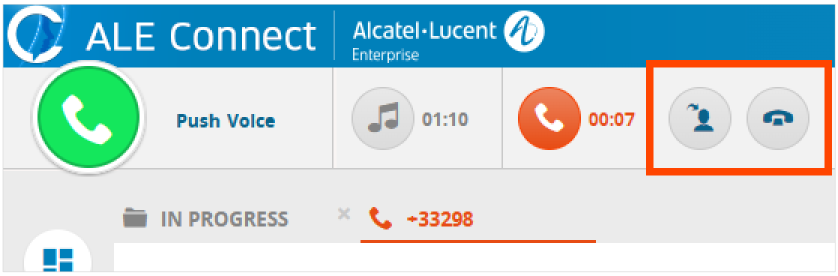
4.8.1.2 Transfer in conversation

This procedure guarantees that the contact will be transferred: you will be connected to the chosen agent and will be able to talk with him/her, before confirming the transfer of the call.

1. From the entry area of your ALE Connect interface, or your phone device, dial the **phone number of the agent** to whom you wish to transfer the call. The contact is then put on hold. A second remote control is displayed on your interface:



2. The recipient agent receives your call via a pop-up and **accepts** it: the timer of this second call starts as soon as you are in conversation with the agent.



3. Confirm the transfer by clicking the **Transfer** button () from the remote control or by pressing the corresponding key of your phone device.

   The call and the corresponding folder are transferred to the recipient agent, who takes over the processing. On your ALE Connect interface, the remote controls and the folder disappear.

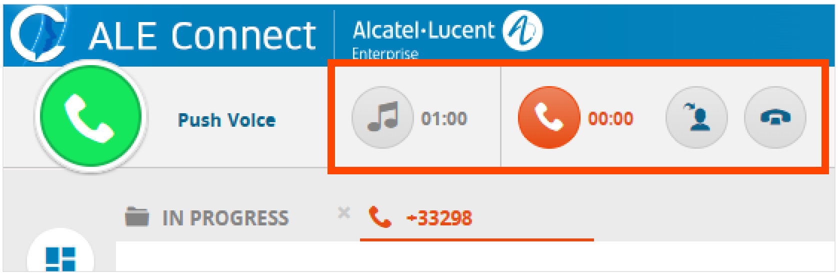
4.8.2 Transferring a call to a pilot

You are processing an incoming or outbound call, and you wish and redirect on a realtime queue (pilot). The call is then distributed to another available agent chosen automatically. You have the possibility to transfer the call to a pilot in supervised or unsupervised mode.

4.8.2.1 Unsupervised transfer

You wish to transfer directly a call to a pilot. The call is automatically distributed to another available agent. With this type of transfer, you are not guaranteed that the call will be supported by an agent.

1. From the entry area of your ALE Connect interface, or your phone device, dial the **phone number of the pilot** to which you wish to transfer the call. The contact is then put on hold. A second remote control is displayed on your interface:

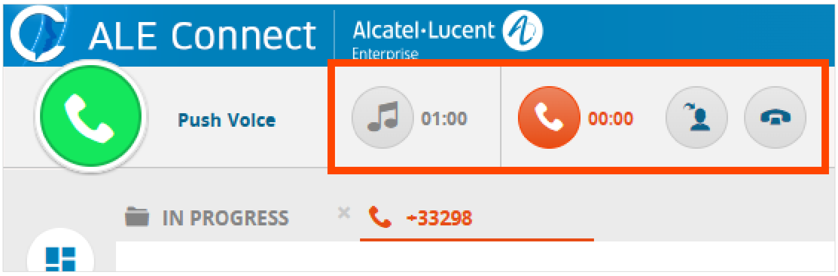


2. Confirm the transfer by clicking the **Transfer** button ( ) from the remote control or by pressing the corresponding key of your phone device, without waiting for the result of the distribution.

   On your ALE Connect interface, the remote controls and the folder disappear. The call is then distributed to another available agent, who is free to accept or refuse the transfer. The call and the corresponding folder will be transfer to the agent who will accept the transferred call.

4.8.2.2 Supervised transfer

1. From the entry area of your ALE Connect interface, or your phone device, dial the **phone number of the pilot** to which you wish to transfer the call. The contact is then put on hold. A second remote control is displayed on your interface:



2. The call is distributed to an eligible and available agent on the pilot. This agent receives the call as a pop-up (like an incoming call).

   a. Without waiting for the agent's reply, **confirm the transfer** by clicking the **Transfer** button () from the remote control or by pressing the corresponding key of your phone device. The call and the corresponding folder are transferred to the agent. The agent is then free to accept or refuse the transferred call. On your ALE Connect interface, the remote controls and the folder disappear.

   b. The recipient **accepts the transferred call**: the timer of this second call starts as soon as you are in conversation with the agent. In that case, **confirm the transfer** by clicking the **Transfer** button () from the remote control or by pressing the corresponding key of your phone device. The call and the corresponding folder are transferred to the recipient agent, who takes over the processing. On your ALE Connect interface, the remote controls and the folder disappear.

4.9 Performing an outbound call

At any time, you can call the person of your choice, whether internal or external to the company.

You can initiate an outbound call in 3 different ways:

- From the entry area of your ALE Connect interface
- From the address book
- From your phone device
- From a contact sheet

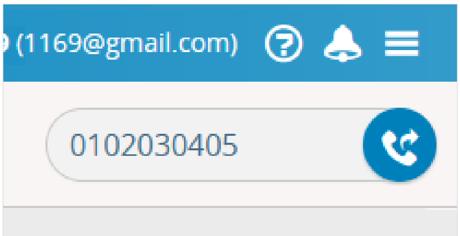
4.9.1 From the entry area of your ALE Connect interface

This action can be performed whatever your operational status. In the event that the outbound call cannot be established, you will be notified by an explanatory message.

4.9.1.1 ACD outbound call

You wish to start an ACD outbound call to an internal or external number. In that case, a folder is created to trace the outbound call.

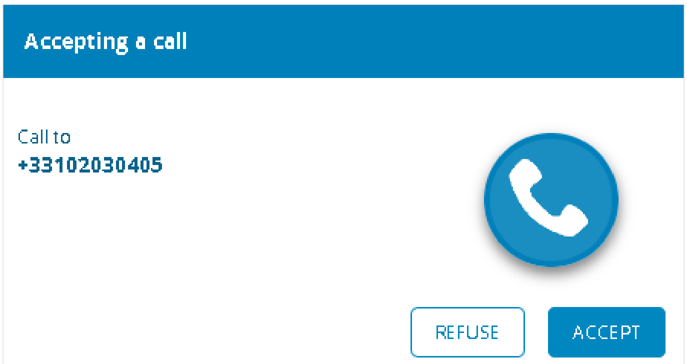
1. Dial the **phone number** in the area located at the top right of your interface:



Note: it is possible to enter a short phone number with 1 or 2 digits.

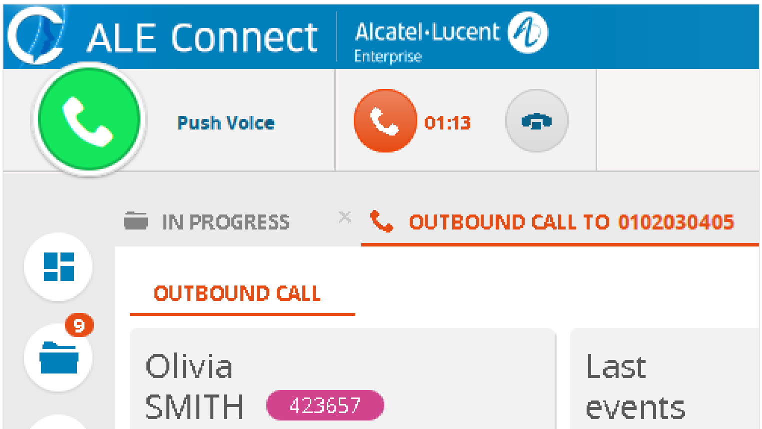
2. Click **Call** ( ) or press the **Enter key** of your keyboard.

   A pop-up (optional according to the setup of your phone device) is displayed on your interface. It suggests to pick up your handset:



3. Click **Accept**.

When the callee picks up, the timer of the remote control starts and the folder of the call is displayed:



4. Take the phone conversation to the end.
5. When the conversation is over, **hang up your phone** or **click the corresponding button** from the remote control.

   If your correspondent hangs up, the consequence is the same. The call is over.

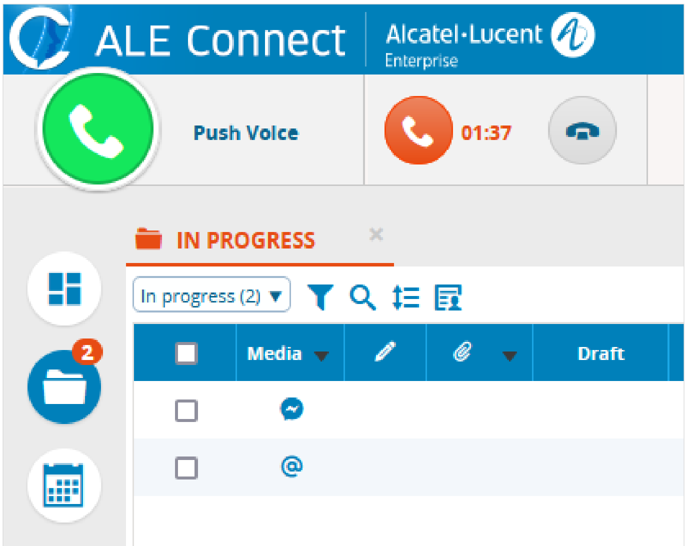
4.9.1.2 Private outbound call

You wish to start a private call to an external number. In that case, no folder will be created in ALE Connect. Only the remote control will be displayed on your interface.

1. Enter the **phone number** of the person you wish to contact in the area at the top right of your interface.
2. Click **Call** ( ) or press the **Enter key** of your keyboard.

   A pop-up (optional according to the setup of your phone device) is displayed on your interface. It suggests to pick up your handset.
3. Click **Accept**.

   When the callee picks up, only the remote control is displayed on your ALE Connect interface:



4. Take the phone conversation to the end.
5. When the conversation is over, **hang up your phone** or **click the corresponding button** from the remote control.

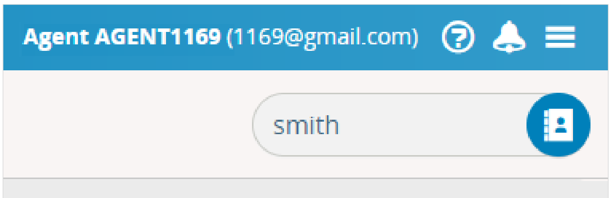
   If your correspondent hangs up, the consequence is the same. The call is over.

4.9.2 From the address book

If you do not know the number of the person you want to contact, you can search it in the address book. The address book lists the contacts in the company with whom you can communicate. When you log in to ALE Connect, you inherit by default a business unit defined at the level of the user group to which you belong: the address book you access is always that of your business unit.

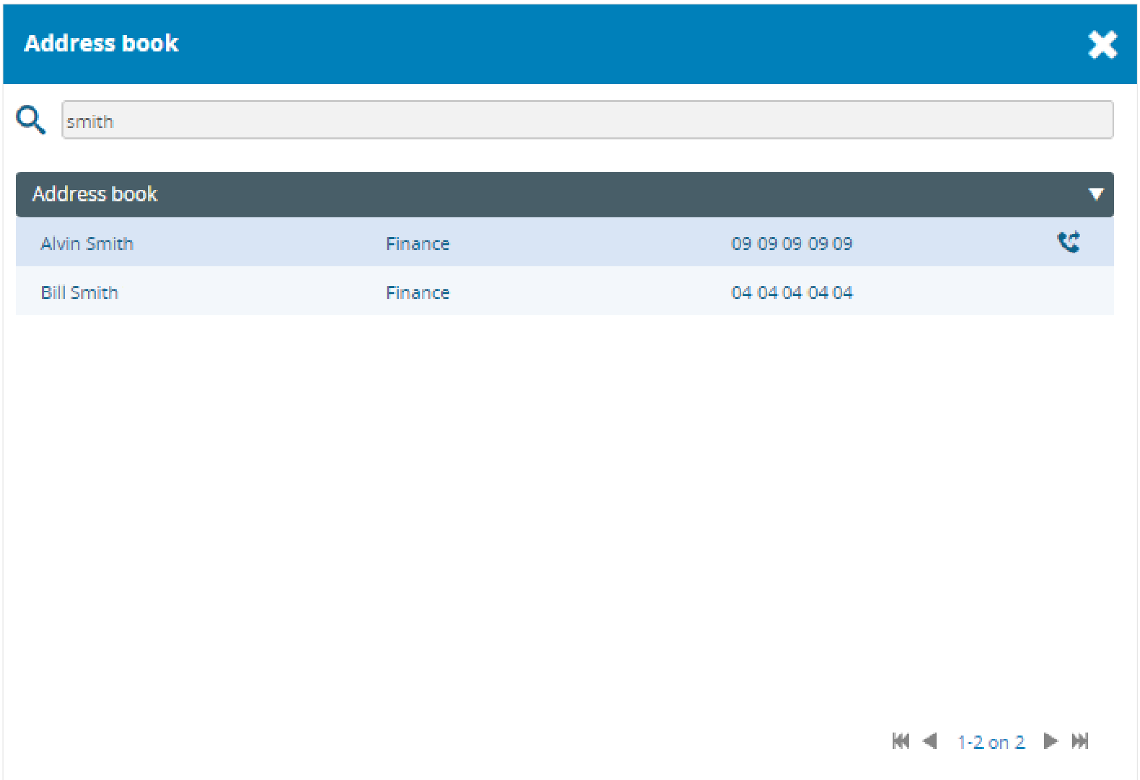
1. Check that your operational status allows you to make an outbound call.
2. Type the text to be searched in the entry field (e.g. last name or first name).

   This step is optional: if you do not fill in anything, the address book will display all the results.



3. Click the **Address book** icon () or press the **Enter key** of your keyboard.

   ALE Connect searches all persons whose **last name/first name/department** contains the text entered, regardless of case. Once the search is complete, the corresponding results are displayed:



For each of them, you can see their last name, first name, department and telephone number.

If no result corresponds to your request, you can **start a new search** from this window: enter a new text and validate your search by clicking the magnifying glass.

4. Move the cursor over the person to be contacted to display the **Call** () action and then click the icon.

   A pop-up (optional according to the setup of your phone device) is displayed on your interface. It suggests to pick up your handset.

5. Click **Accept**.

   Your interface is changed: the remote control is displayed in the banner. ALE Connect also creates a new folder if it is an ACD outbound call. The conversation starts to count down as soon as the caller picks up the phone.

6. Take the phone conversation to the end.

7. When the conversation is over, **hang up your phone** or **click the corresponding button** from the remote control.

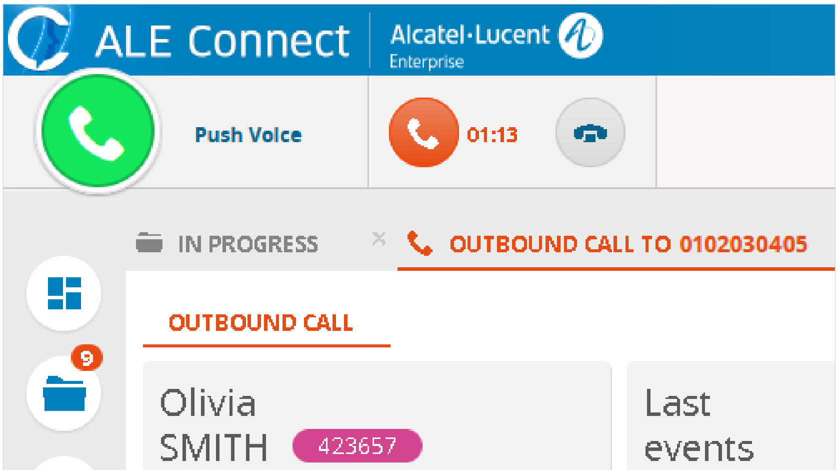
   Si c’est votre interlocuteur qui raccroche, la conséquence est la même. L’appel est terminé.

4.9.3 From your phone device

4.9.3.1 ACD outbound call

You wish to start an ACD outbound call to an internal or external number. In that case, a folder is created to trace the outbound call.

1. Pick up your handset then dial the **phone number**.
2. When the callee picks up, the timer of the remote control starts and the folder of the call is displayed:



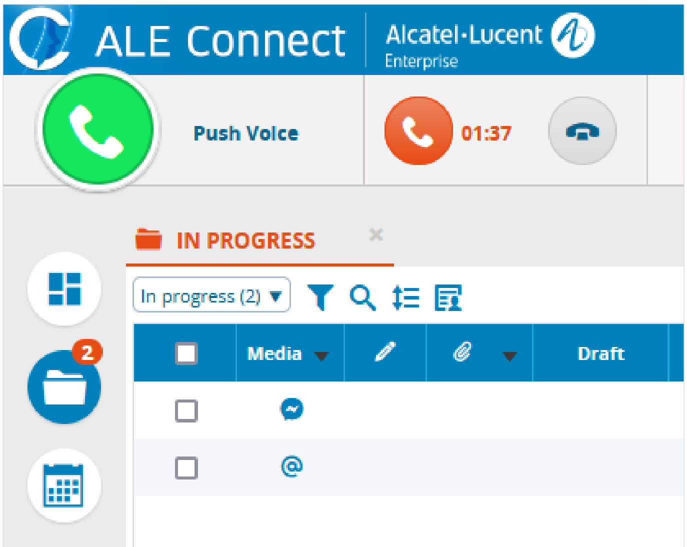
3. Take the phone conversation to the end.
4. When the conversation is over, **hang up your phone** or **click the corresponding button** from the remote control.

   If your correspondent hangs up, the consequence is the same. The call is over.

4.9.3.2 Private outbound call

You wish to start a private call to an external number. In that case, no folder will be created in ALE Connect. Only the remote control will be displayed on your interface.

1. Pick up your handset then dial the **phone number**.
2. When the callee picks up, only the remote control is displayed on your ALE Connect interface:



3. Take the phone conversation to the end.
4. When the conversation is over, **hang up your phone** or **click the corresponding button** from the remote control.

   If your correspondent hangs up, the consequence is the same. The call is over.

4.9.4 In case of logout

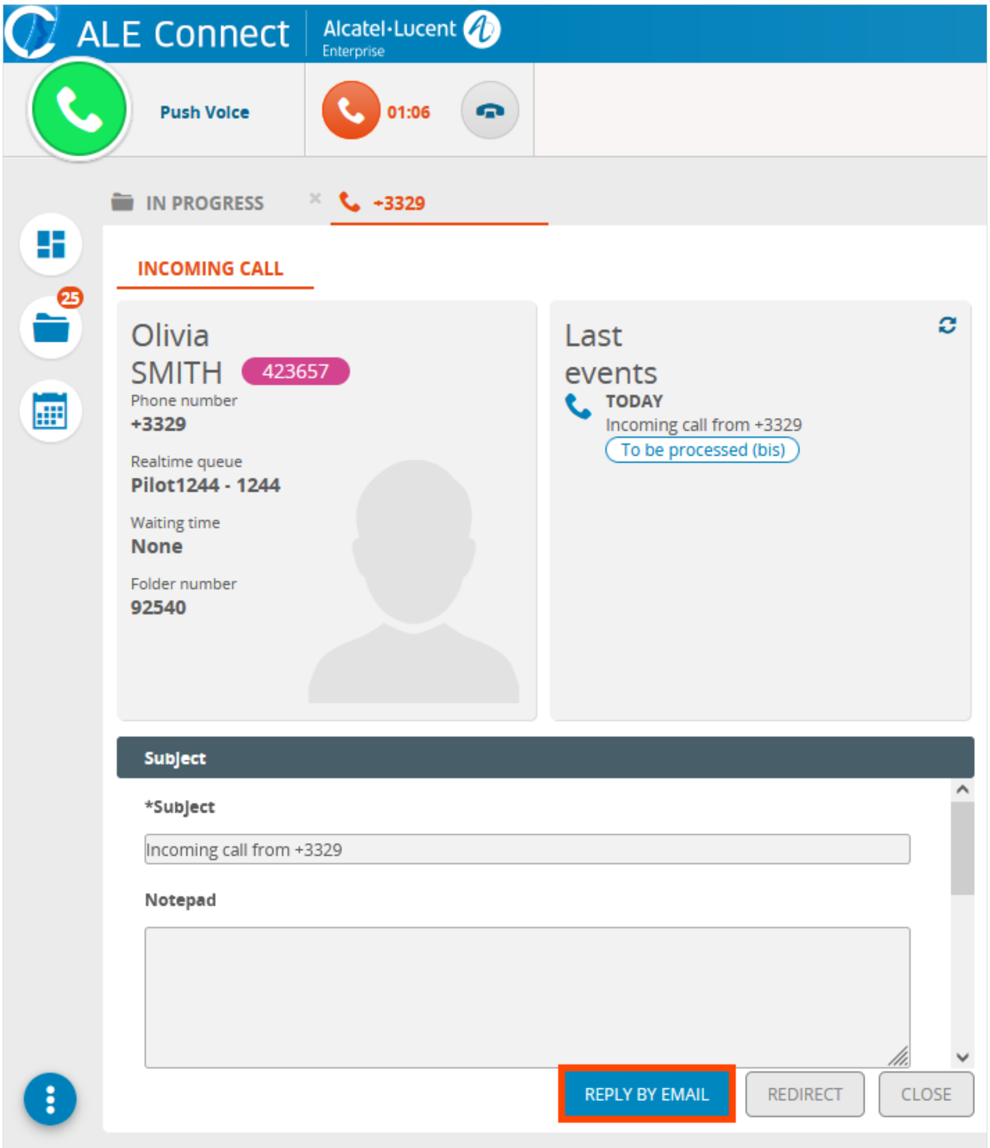
A technical problem occurred during the call (e.g.: unexpected closing of the browser) and you were logged out from ALE Connect. **Please note that the phone call remains established.** After logging in again, a message will inform you that your line is busy and that call dispatch can only be resumed once the telephone line is free.

4.10 Sending an email during a call

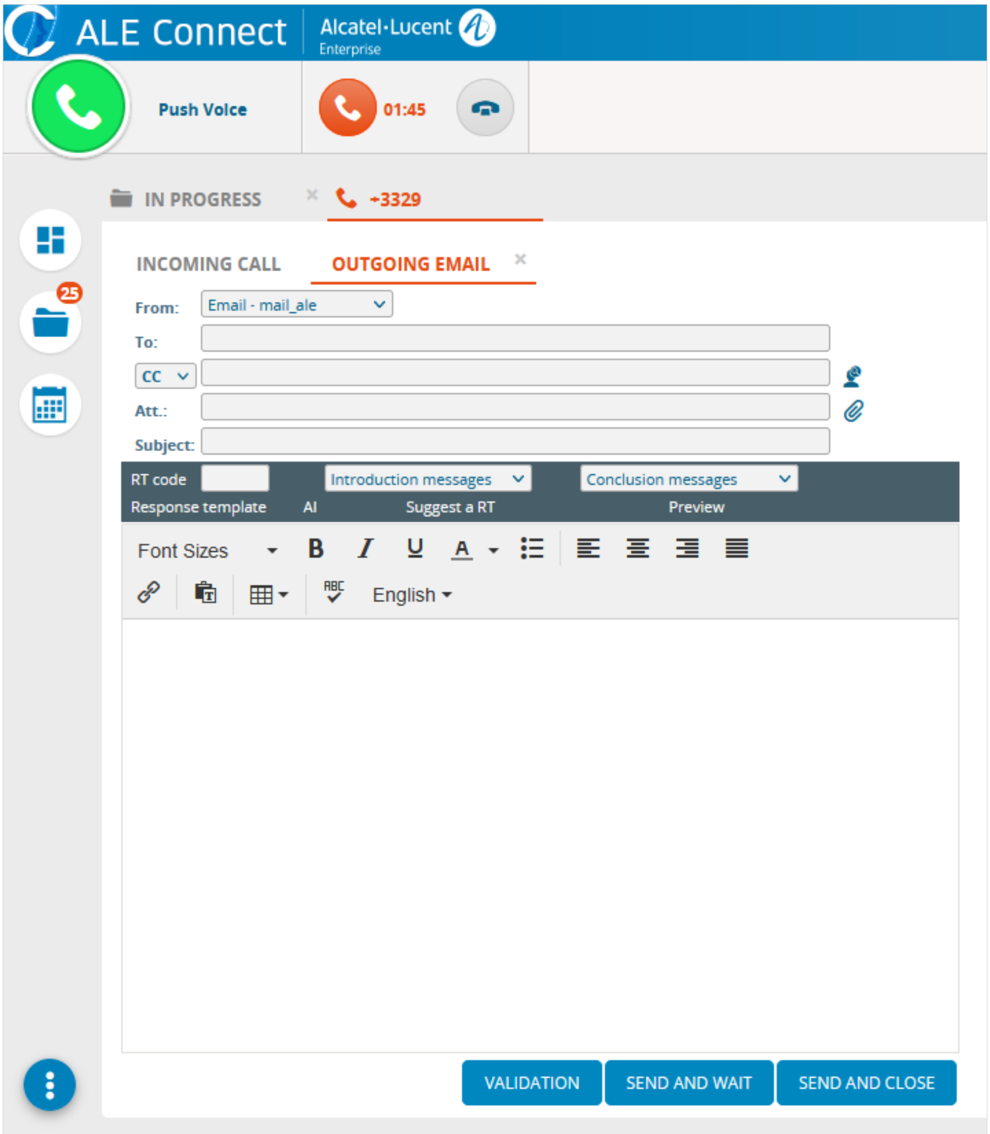
When you process a call, incoming or outbound, you can send the contact an email which will be associated with the folder for follow-up (e.g. the contact asks you to confirm in writing the times of an appointment). The call continues throughout the procedure: the voice folder therefore remains open on the screen.

Once the call is completed, the email is merged with the processed voice folder: **the original voice folder becomes an email folder** for the contact to respond to. It is stored in the In Progress or Processed desktop depending on the send action you have chosen.

1. During the call, click the **Reply by email** button located in the Subject field of the folder:



A new **Outbound email** tab is displayed within the voice folder:



This screen looks exactly like a spontaneous email.

2. In the **From** field, check that the default **email queue** selected is correct. If not, change it.
3. In the **To** field, check the **email address** of the contact. If the field is empty, enter it.

   ALE Connect automatically retrieves the contact's main email address if it is saved in the contact sheet. However, it can be changed.
4. Write the email using the editing and formatting options available to you.

5. When the email is ready to be sent, click the button of your choice:

   Validation: ALE Connect sends the folder for validation to your supervisor for verification. After clicking the button, the Validation (closed) status is applied to the folder sent to the supervisor. The supervisor will then receive the folder, can reread your reply, then accept or refuse it.

   Send and wait: the reply is sent to the contact pending further information from him/her. The folder is stored in the desktop of process folder with the Waiting for contact status. When the contact replies, the folder returns to the desktop of in progress folders with the Contact reply status.

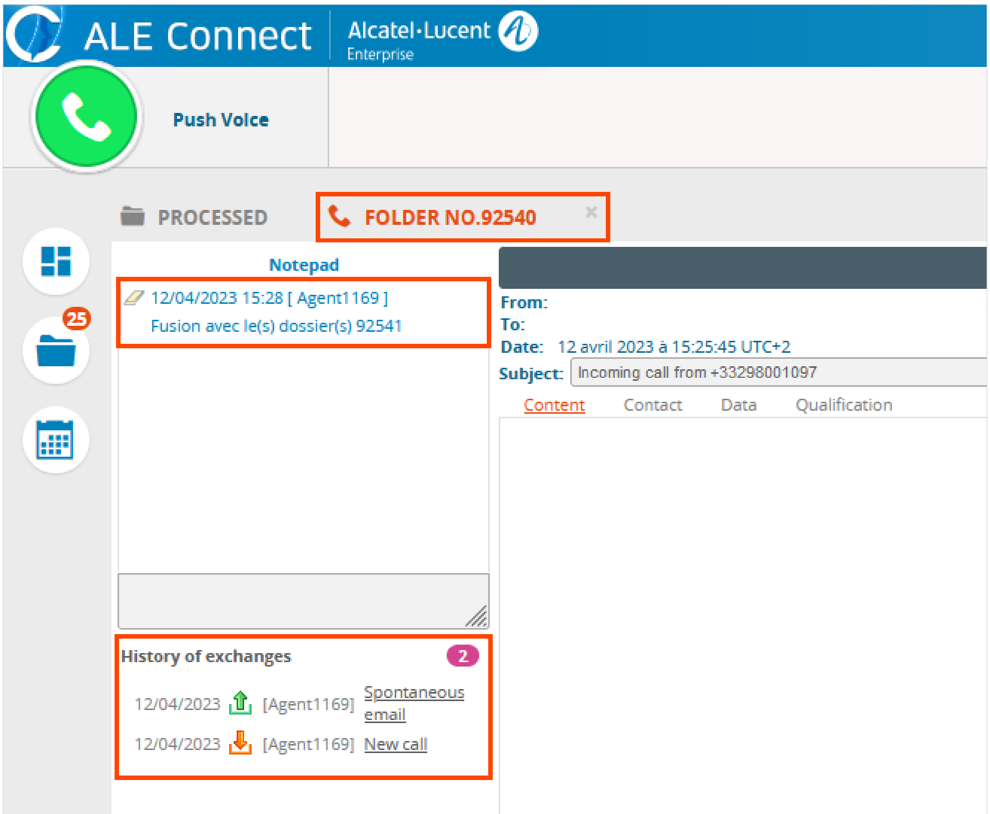
   Send and close: the answer is sent to the contact. The Closed status is applied to the folder stored in the desktop of processed folders. If the contact sends a new message related to this folder, the To be processed status is applied to the folder which returns to the desktop of in progress folders.

6. Qualify the email folder and validate your choice.

   The email is sent according to the previously selected option. The Outbound email tab of the voice folder is closed.

7. Continue to process the call until it is completed.

   Once the call is complete, an email folder is created in the appropriate desktop. In the notepad, a note (automatically generated by ALE Connect) indicates that this folder has been merged. There are **2 traced exchanges**: the first is the call; the second is the email you sent to the contact.



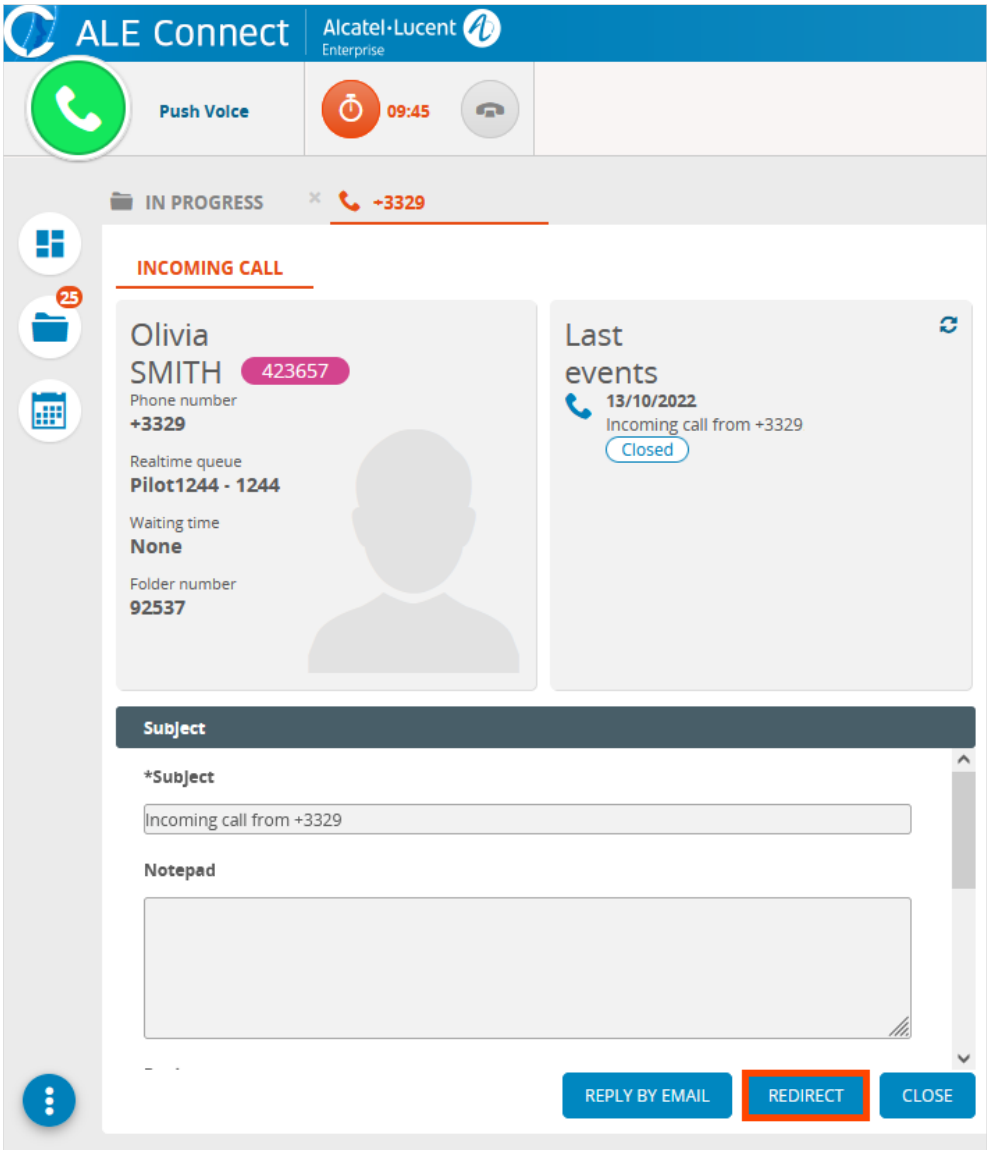
4.11 Redirecting a voice folder

Sometimes the contact's request is not resolved at the end of a call (incoming or outbound). The folder cannot therefore be closed, because other actions are necessary to continue its processing (e.g. following an invoicing error, the folder must be sent to the accounting department). In that case, you can redirect the folder: this action consists in transforming the current call folder into an **email folder** to ensure its follow-up. Once the call is over, the email folder is created with the status **To be processed (bis)** and is stored in the **In Progress** desktop. The folder number that was assigned to the call is kept.

Warning: redirecting a call is only possible during the wrap-up phase. You therefore have a limited time to react.

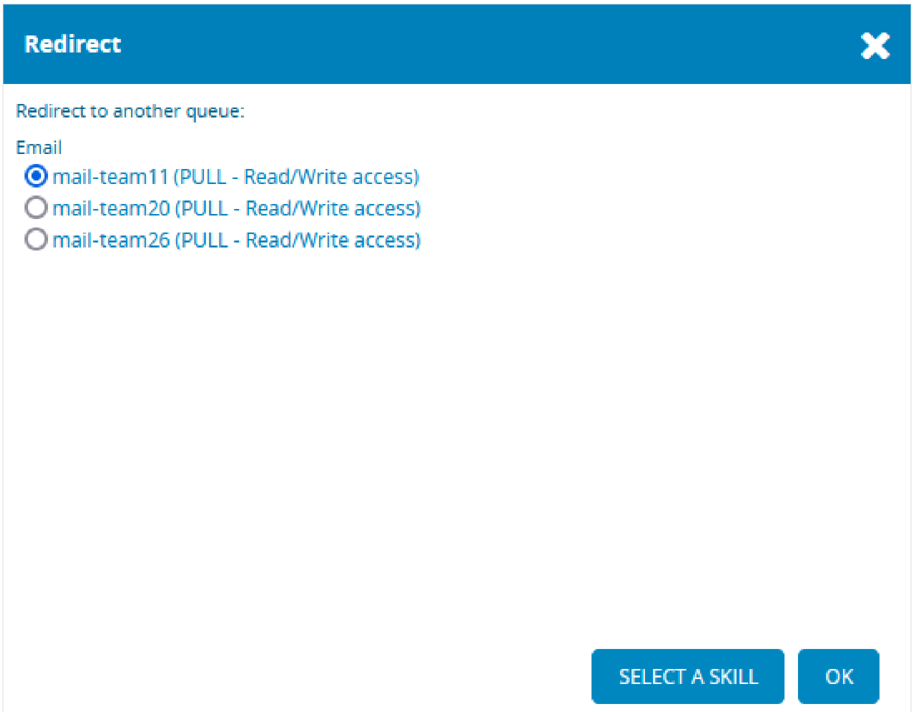
1. The call you are currently processing ends: you enter the wrap-up phase.

   A **Redirect** button is activated at the bottom of the screen, in the Subject area of the folder:



2. Click the **Redirect** button.

A window displays **written media queues** to which you can redirect the folder, i.e. those to which you have rights.



3. Select the **queue** to which the folder must be redirected.
4. Click the **Select a skill** button if you wish to change the skill necessary to process the folder (optional step). Otherwise, ALE Connect will automatically assign the default skill of the selected queue. In the case where the queue does not have a default skill, the folder will keep the original skill.

   If you do not wish to select a skill, directly click **OK**.
5. Select a skill and click **OK**.

   A new email folder with the status To be processed (bis) is created in the In Progress folder. Its subject indicates by default "Incoming call from ...". Its queue and skill are those chosen during the redirection.

5 Emails

Warning: requires an ALE Connect license including all interaction channels.

ALE Connect has a messaging module, allowing you to process emails received by the contact centre, or to send them. Email management with ALE Connect offers many functionalities such as:

- intelligent routing sorting incoming emails,
- distribution in pull or push mode,
- transfer of internal or external requests,
- knowledge base including response templates,
- spell checker,
- response assistance with artificial intelligence,
- grouped processing actions,
- agent response validation workflows,
- HTML templates for responses,
- customised request qualification.

5.1 Supporting an email

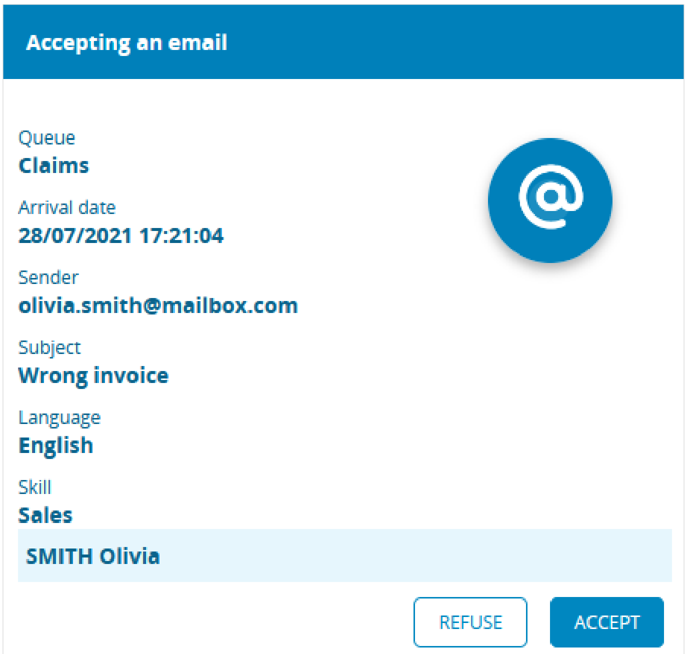
Depending on how emails are received (push or pull), you are not requested in the same way. To process push emails, you must be logged in with a status that allows their processing. To process pull emails, you just need to have rights on queues, skills and languages, and then select the email to be processed.

In all cases, the processing is the same.

5.1.1 In push mode

5.1.1.1 Step 1: email arrival

A pop-up window (optional) is automatically displayed in your workspace when an email arrives:



It allows you to know:

Queue
Name of the realtime queue in which the email is stored.

Arrival date
Arrival date and time of the incoming email.

Sender
Email address of the mailbox from which the email was sent.

Subject
Subject of the email entered by the sender.

Language
Working language.

Skill
Skill required to process the email, on which the platform has based its distribution.

Last name / First name
Last name and first name of the sender if identified in the contact database.

5.1.1.2 Step 2: choice of the action

When the window is displayed, you have 3 possibilities:

You accept the email. Your interface is changed: a new folder is opened in a new tab, named with the folder number.

You refuse the email. ALE Connect distributes the email to another agent with the same rights, who can accept or refuse it.

You ignore the email. The pop-up window remains displayed during a time limit (defined by the coordinator). If you do not click either button, a stealth message is then displayed informing you that you have not accepted the pop-up within the time limit. ALE Connect will then distribute the email to another agent with the same rights, who can accept or refuse it.

5.1.2 In pull mode

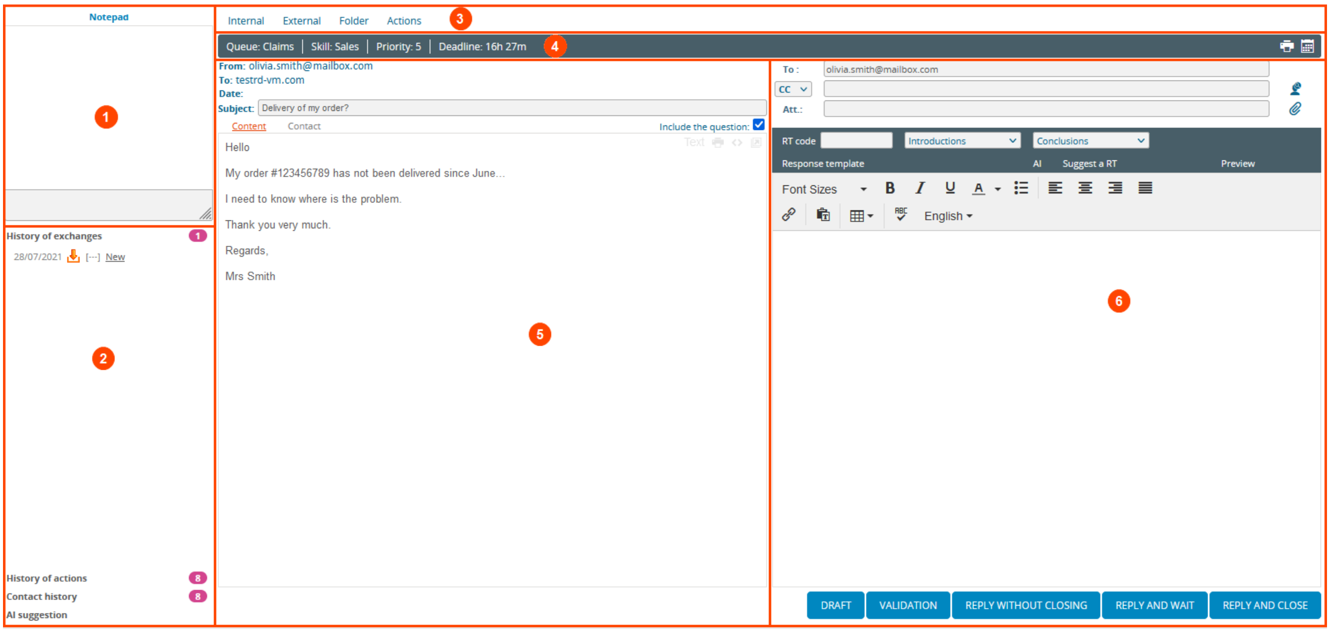
The email arrives directly in the desktop of in progress folders. You have to view this list by yourself to select the email to process.

5.2 Introducing the email folder

Once you have accepted to support an email (in push or pull mode), ALE Connect opens the corresponding folder in a new tab. If it is a push email, the tab cannot be closed. Each new incoming message automatically generates a new folder. The following exchanges will be attached to this same folder according to its number. The folder unique number is used as a link to associate any exchange with this folder.

If the email being processed has been pushed by ALE Connect, the application will not push any other interaction to you, whatever its type. However, you have the right to open other emails from the list of folders in progress, in pull mode.

5.2.1 Overview



The left part displays a **notepad** **(1)** and various **widgets** **(2)** to help you processing the folder.

On the upper part, a **menu bar** **(3)** shows possible actions on this email: redirect it to another queue, send it to an expert, etc.

Just below, you can view the **main characteristics** **(4)** of the folder:

- the queue on which it depends,
- the required skill,
- the processing priority,
- the processing deadline,
- an icon allowing you to print all the messages exchanged during the processing of the folder,
- an icon allowing you to create a task related to the contact associated with the folder.

5.2.2 Incoming message

The central part of the folder displays the **last message of the contact** (5). The email header reminds you the sender's address, the recipient's address, recipients in copy (optional) as well as the receipt date and time. The subject describes the email subject entered by the sender. Depending on the setup performed by the coordinator, this field may contain the number assigned to the folder. You can change the subject if necessary.

Click the tab:

- **Content** to view the content of the message in text or HTML format.
- **Contact** to view the contact information. It is possible to modify directly his/her sheet, or to change the contact assigned to the folder.
- **Data** to view or modify information related to the folder (additional data retrieved from a contact sheet filled in on a website for example). Only fields with values are displayed. Data can be modified, if necessary, by clicking the corresponding link.

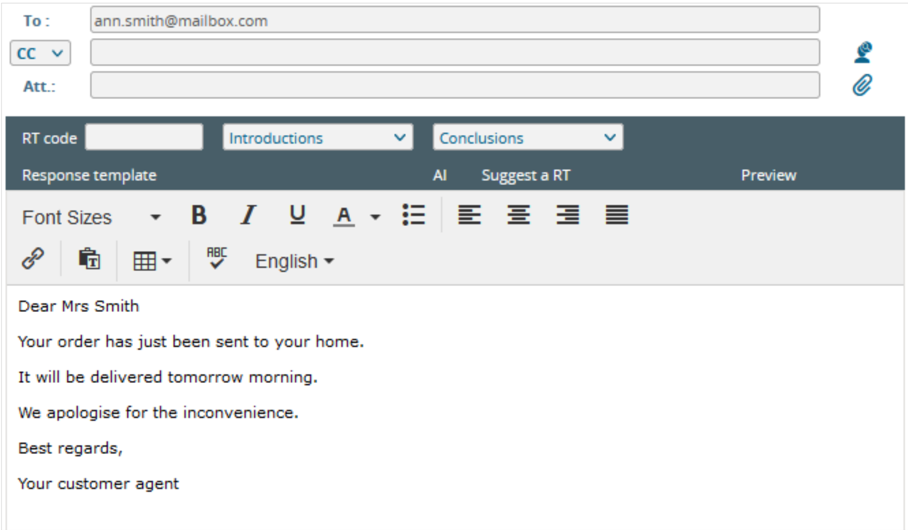
Warning: the folder entry form can be configured. We invite you to contact the ALE Connect coordinator for further information.

When you hover over the upper right corner of the message, a toolbar is displayed:

Text/HTML	Allows to choose the display format of the message.
	Starts printing the message from a new tab of the current browser.
	Displays the source code of the page in a pop-up window (functionality strictly reserved to supervisors and coordinators).
	Displays the content of the message in a pop-up window, for an optimised reading.

5.2.3 Reply interface

The right part of your workspace allows you to **write the reply** (6) that will be sent to the other recipient(s). To go faster, you can use the writing help tools. The editing options allow you to format the text as you wish: font size, colour, bold, etc. It is also possible to insert images.



5.3 Processing an email

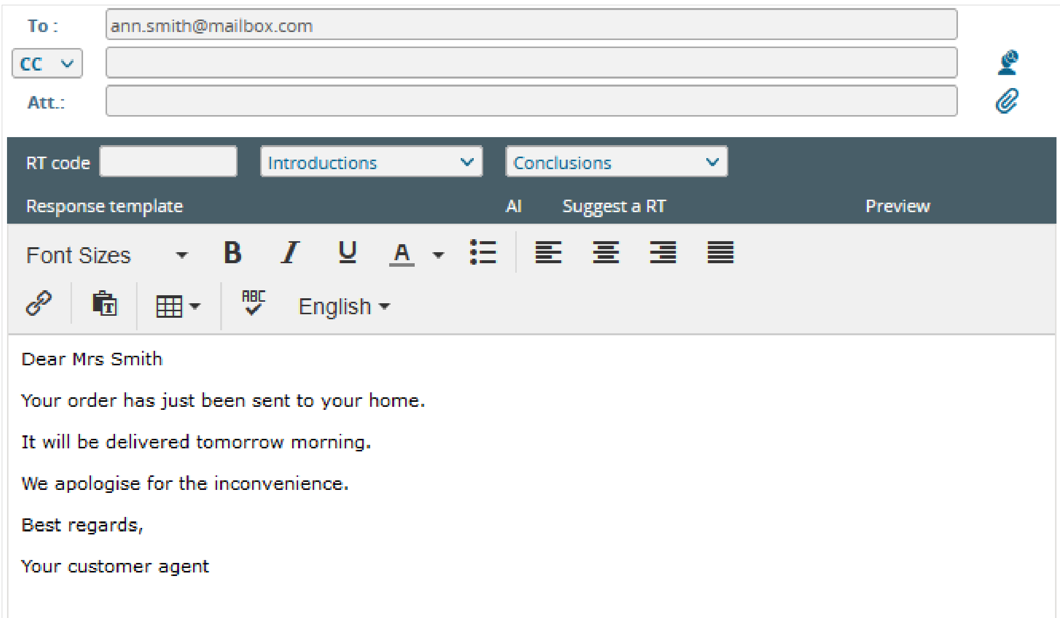
This procedure explains you how to reply to an email with ALE Connect. Note that you do not have to send immediately the reply. It can, for example, be subject to validation by your supervisor or even be saved as a draft.

1. Accept to support an email: the folder is opened in your ALE Connect interface.
2. Check the email address of the **recipient (A)**.

   The field is already filled in with the sender's email address. However, it can be changed if you have the rights. In all cases, the folder always remains attached to the original contact.
3. Add **copy recipients (CC)** and/or **blind copy recipients (BCC)** if necessary.

   You can either enter them manually, or use the address book by clicking the corresponding button. When there is more than one copy and/or blind copy recipient, enter a comma between each email address without putting a space before or after.

   Warning: the A, CC and BCC fields are not case-sensitive.
4. Add any attachments to your reply to support it (form to be filled in, etc.).
5. Write your reply by using the writing help tools.



The editing options allow you to format the text as you wish: font size, colour, bold, etc. It is also possible to insert images. Do not hesitate to preview the final result, by clicking the corresponding link, to make sure everything is correct.

6. When the reply is ready, click the button:

   Draft: ALE Connect immediately saves the reply as it is. You remain on the email processing window. The folder remains in the To be processed status. The draft is visible by all employees of the contact centre.

   Validation: ALE Connect sends the folder for validation to your supervisor for verification. After clicking the button, the Validation (closed) status is applied to the folder sent to the supervisor. The supervisor will then receive the folder, can reread your reply, then accept or refuse it.

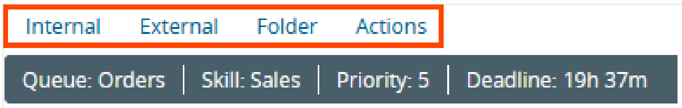
   Reply without closing: this action is available only if the interaction depends on a queue in pull mode. It allows you to send a non-final reply to the contact (to keep him/her waiting, for example). The To be processed (bis) status is applied to the folder which remains in the In progress desktop.

   Reply and wait: the reply is sent to the contact asking for further information. The folder is stored in the desktop of processed folders. When the contact replies, the folder returns to the desktop of in progress folders with the Contact reply status.

   Reply and close: the reply is sent to the contact. The Closed status is applied to the folder stored in the desktop of processed folders. If the contact sends a new message related to this folder, the To be processed status is applied to the folder stored in the In progress desktop.

5.4 Processing actions

When you are processing an email, several actions are available from the menus on top of the screen:



Warning: the available actions depend on the queue (push or pull mode) and your user rights set up by the ALE Connect coordinator. As a result, when you are not allowed to perform an action, it is not displayed.

Internal menu

- Redirect to another queue
- Assign another priority
- Redirect to another agent
- Redirect to another skill

External menu

- Redirect to an expert
- Forward

Folder menu

- Close
- Archive
- Free
- Reserve
- New folder
- Move to the Recycle Bin

Actions menu

- Qualify
- Print

5.5 Writing help tools

When you write a response (to a spontaneous email or not, etc.), ALE Connect offers tools to make your work easier, improve the quality of content and speed up your entry:

- Response templates
- Introduction and conclusion messages
- Copying and pasting images
- Artificial intelligence engine
- Preview before sending/printing

5.5.1 Response templates

Some questions or requests are frequently asked to the contact centre. For this reason, ALE Connect provides you a knowledge base containing response templates. These ready texts have two benefits: to limit entry errors (or misunderstandings) and to reduce the time needed to process a folder. They will prevent you from rewriting the same explanations over and over again.

Response templates can be used when processing an email, chat, Facebook Messenger or Twitter conversation.

Warning: as an agent, you cannot add or delete response templates in the knowledge base. This base is fed either by a coordinator, or by the supervisors (when they validate the response templates suggested by their agents).

5.5.1.1 Inserting a response template

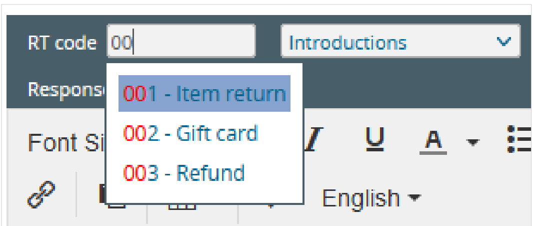
You have 4 possibilities:

- by selection from the Knowledge base tab,
- by entering the RT code,
- by autocompletion during your entry,
- by copying and pasting the text of the response template.

Whichever method is chosen, the text of the response template can be modified once inserted into the message.

5.5.1.2 RT codes

Each response template is identified by a unique code. This allows you to insert the response template directly into your message, without performing a prior search. When the **RT code** field is available, enter the desired code:



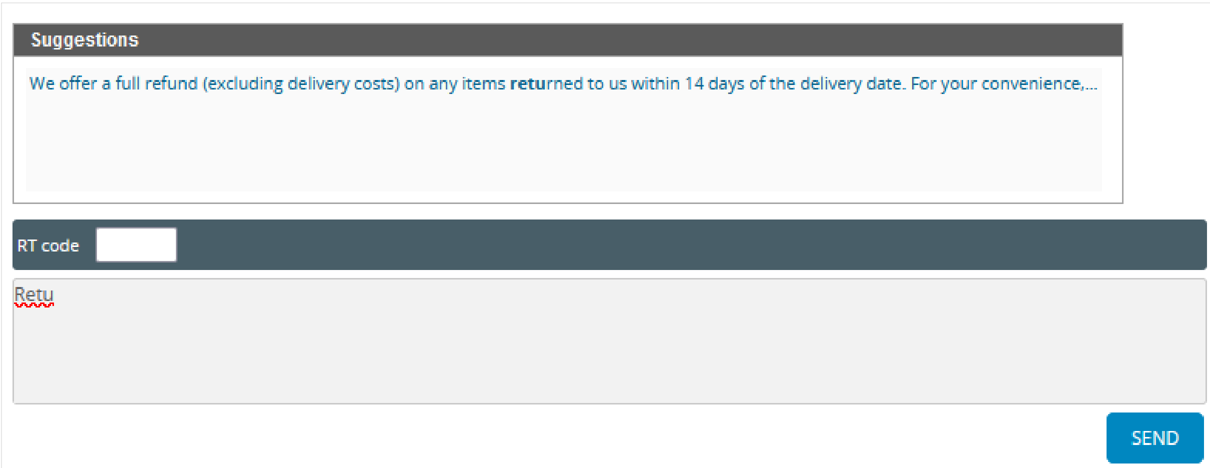
As soon as you begin your entry, ALE Connect automatically displays all the response templates, whose code begins with the indicated characters. Their name is also displayed to facilitate your choice. Once the response template has been selected, its content is automatically inserted into your message with its potential attachments.

5.5.1.3 *Autocompletion*

Autocompletion, or completion, is a computer process that aims to speed up your entry: simply start to type a word - 3 characters minimum - so that response templates for which the body text contains the entered character string are automatically suggested. Simply click the desired response template to insert it into your message. This insertion mode is very practical especially when you are processing a chat or Facebook Messenger folder.

Warning: available only if response templates of message type have been created in the knowledge base.

On the example below, the agent has started to enter the word "technician" and a response template has been automatically suggested:

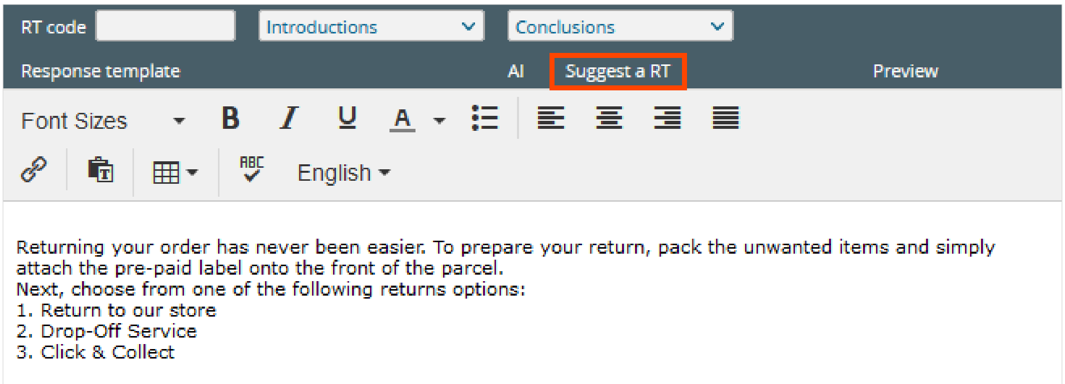


The search is not case or accent sensitive. In case of entry error, or if the response template of the knowledge base contains an accent error, it is still suggested. However, special characters are interpreted and must therefore be entered to find the corresponding search results.

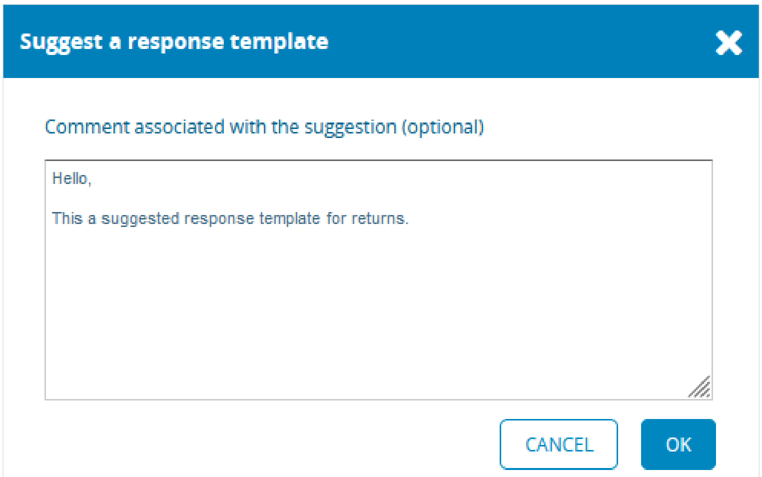
5.5.1.4 *Suggesting a response template*

You have noticed that a request is frequently asked and there is no response template for it. You wish to write it and submit it to your supervisor for integration in the knowledge base. This functionality is available when you write an email (spontaneous, reply to a request, etc.).

1. Open the folder to which you wish to answer.
2. Write the response template in the email body.
3. Click **Suggest a RT**.



4. If necessary, enter a **comment** to the supervisor who will be responsible for validating it.



5. Click **OK**.

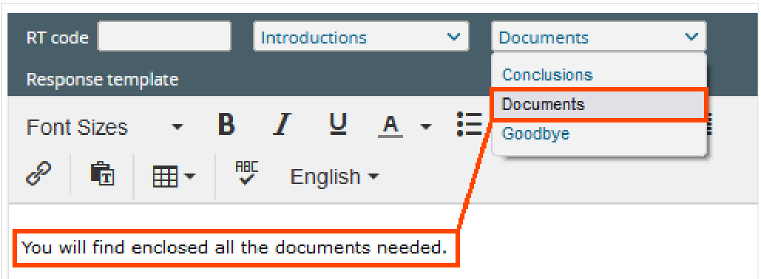
5.5.2 Introduction and conclusion messages

These predefined texts can be inserted at the beginning or end of a written response. They reduce the handling time of a folder. It saves you from re-typing the same text each time.

There are two types of messages:

- the **introduction message** is inserted at the beginning of an email or a chat;
- the **conclusion message** is inserted at the end of an email (not usable for chats);

They are created and managed by a coordinator. According to this setup, they can be automatically inserted by default into emails or chats, or selected manually when processing a folder. In case of automatic insertion, the message is displayed on the first/last position of the response, as soon as the folder is opened. If the default message is not suitable, it is possible to modify directly its content or to choose another one. Then simply select the desired message from the choice list:



5.5.3 Copying and pasting images

You can insert images into the body of the response, by drag and drop or copy and paste. However, the use of this functionality depends on the browser used:

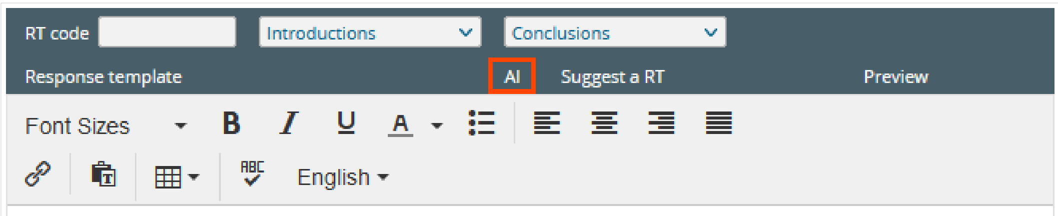
	Firefox	Chrome	Edge
Drag and drop	✓	✓	✓
Ctrl + C / Ctrl + V of the file from a directory	✓	No	No
Ctrl + C / Ctrl + V of the image from Paint	✓	✓	✓
Ctrl + C / Ctrl + V of the image from the browser*	✓	✓	✓

*Tested from Google Images

5.5.4 Artificial intelligence engine

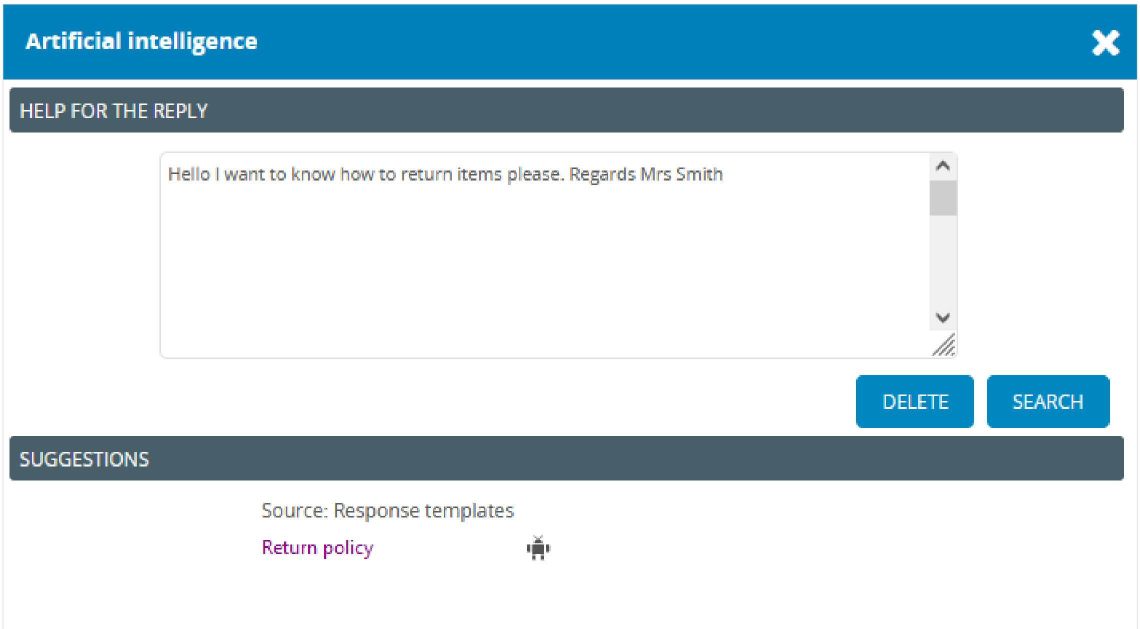
ALE Connect artificial intelligence engine is able to analyse the current request and to suggest the most appropriate response template. Depending on the question asked, it searches the most appropriate answers, in order to use them as a basis for an answer. If these responses are not satisfactory, you simply need to interrogate the engine again, after modifying the contact request. This functionality is only accessible when you write an email (spontaneous or in response to a folder).

1. Start writing an email.



2. Click **AI**.

   The artificial intelligence engine is displayed:



Help for the reply displays the subject and body of the email you are replying to. The engine uses this content to perform its search. **Suggestions** display the response templates from the knowledge base that are the most relevant to the request.

The icon allows you to search other close responses.

If the help for reply is not suitable, you can clear all by clicking the corresponding button. Then enter the new text and validate your search by clicking the corresponding button.

3. Click the **suggestion to insert** into the email body.

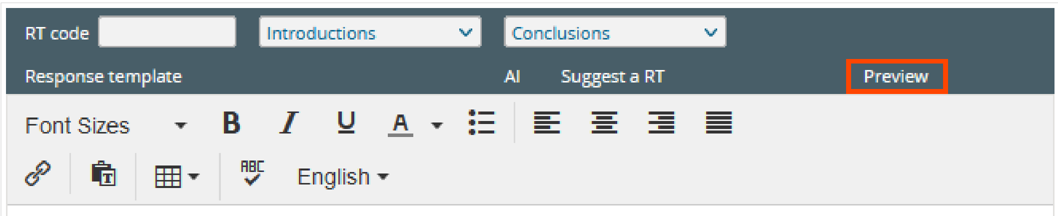
   Its text can be readapted, if necessary.

4. Close the window when you have finished.

5.5.5 Preview before sending or printing

It is possible to get an overview of the response being drafted at any time. You will thus have an idea of the final rendering, before sending.

1. Start writing an email.



2. Click the **Preview** button.

   A window is opened and displays the response as it will be sent to the recipient. If some signatures have been set up, they are present as well as the original message. The preview also takes into account the HTML template associated with the queue, if existing.

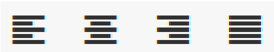
3. Close the window when you have finished.

5.6 Editing and formatting options

When you write an email or reply to an email, several editing options are available.

Warning: the presence of certain options depends on the configuration performed by the ALE Connect coordinator.

5.6.1 Text formatting

Font Sizes ▾	Choice of font size.
B	Applies the bold style.
I	Applies the italic style.
U	Underlines the text.
A ▾	Selection the text colour.
	Inserts bullets in the text.
	Aligns text left, centre, right or justified.
	Inserts or modifies a hypertext link.
	Pastes the selection from the clipboard as text.
	Inserts a new table.
ABC	Spell checker. After clicking the button, this tool analyses the content of the email. The detected errors are highlighted in yellow. You must click the button a second time to send the email, even if there are still errors. The manual or automatic triggering of the spell checker depends on the setup defined by the platform administrator.
English ▾	Choice of message language.

5.6.2 Table formatting

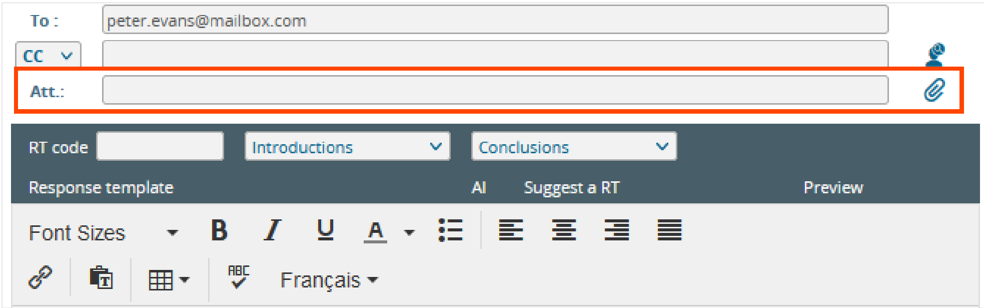
	Inserts a new table and opens the window for configuring a new table.
Row properties	Opens the window to edit the properties of the selected row.
Cell properties	Opens the window to edit the properties of the selected cell.
Insert a row above	Adds a row above the selected row.
Insert a row below	Adds a row below the selected row.
Delete the row	Deletes the selected row.
Insert a column above	Adds a column to the left of the selected column.
Insert a column below	Adds a column to the right of the selected column.
Delete the column	Deletes the selected column.
Split merged cells	Splits the merged cell as originally.
Merge cells	Merges the selected cells into one.

5.7 Attaching files to an email

You can attach one or several files to send, when you are processing an email. All file formats are accepted. The maximum size of an attachment is 20MB. All the attachments of a folder (cumulated during the exchanges) are visible in the corresponding widget.

5.7.1 Adding attachments

1. Click **Attachments** () located to the right of the **Att.** field:



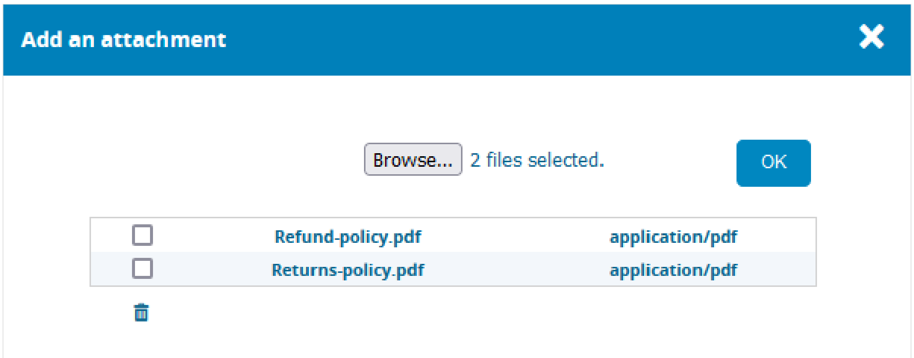
   A window is displayed asking you to select files.

2. Click the **Browse** button.
3. Select the files to attach to the email.

   Note: it is possible to perform a multiple selection by pressing the key combination <Ctrl> + <Shift> + <Down arrow> / <Up arrow>.

4. Click **Open**.
5. Click **OK** to confirm the action.

   ALE Connect adds the selected files as attachments:



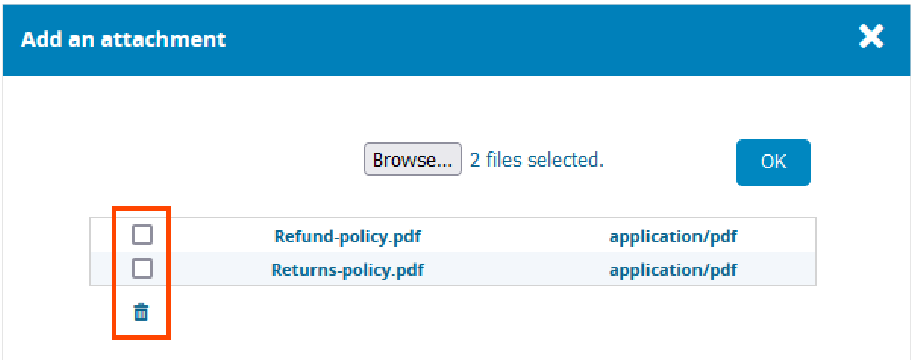
6. Close the window when you have finished.

   The attachments are displayed in the ATT field:

5.7.2 Removing attachments

Each attachment can be removed individually, by clicking the corresponding icon in the ATT field. Otherwise, you can also follow this procedure:

1. Click **Attachments** (📎) located to the right of the **ATT** field.
2. Check the attachments to remove:



3. Click the **Remove** button (🗑).

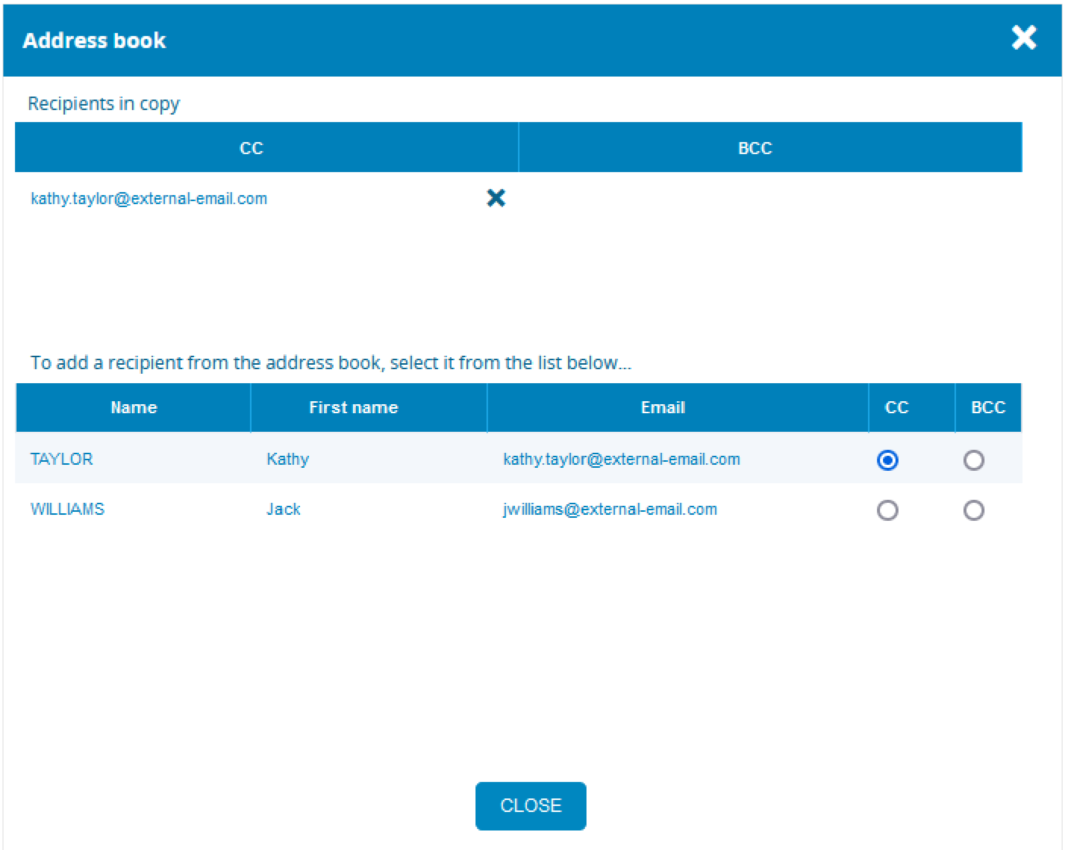
   ALE Connect deletes the attachments of the email, without requesting prior confirmation.

5.8 Using the address book

When you write an email, spontaneous or not, you can search the recipient's addresses in copy or hidden copy in an address book, rather than entering them manually.

This address book is managed and owned by the coordinator. You cannot therefore create, modify or delete a recipient.

1. Click the **Address book** icon ( ) located to the right of the CC/BCC field.



2. Check the **CC** option for each recipient in copy of the email.
3. In the same way, check the **BCC** option for the recipients in blind copy.

   ALE Connect adds the recipients in the corresponding columns. In case of error, you can remove a recipient by clicking the corresponding button.
4. Click **Close** when you have finished.

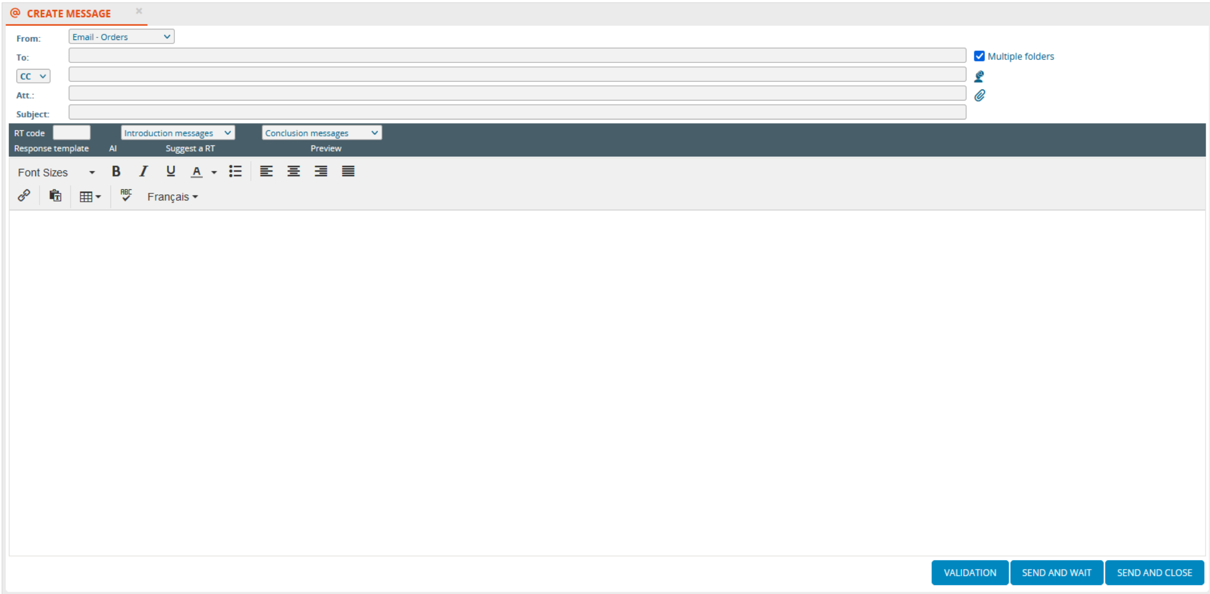
5.9 Sending a spontaneous email

You have the possibility to write an email or initiate a correspondence without prior solicitation of the contact. Sending a spontaneous email automatically generates a new folder. This functionality is accessible from the taskbar, regardless of the task in progress, or from a contact sheet if it contains an email address.

Warning: functionality available only if authorised by the coordinator.

1. Click the **Send a spontaneous email** button (@) in the taskbar.

   A new tab is displayed in your workspace:



2. Fill in the following fields:

   From
   Select, from the help list, the expedition queue. Only email queues for which you have write and read permissions are displayed. If a skill is associated with the chosen queue, it is automatically assigned to the spontaneous email. Otherwise, the default skill of the tenant will be assigned.

   To (mandatory)
   Enter the addresses of the people to whom this email should be sent, separated by a comma without spaces before or after. If the spontaneous email has been generated from a contact sheet, this field is automatically pre-filled in with the contact's address inherited from the folder. However, it can be modified. In all cases, the folder always remains attached to the original contact.

   Multiple folders
   If this email is sent to several recipients, ALE Connect can create a separate folder for each of them by checking this option. Uncheck the box to create a single folder for all recipients of the email.

CC/BCC
Enter the email addresses of the recipients in copy (CC) and/or in blind copy (BCC). You can either enter them manually, or use the address book (button). When there is more than one copy and/or blind copy recipient, enter a comma between each email address without putting a space before or after.

Warning: the A, CC and BCC fields are not case-sensitive.

ATT
It is possible to attach files to your response to support it (procedure, form to fill in, etc.).

Subject
Enter the subject of this email.

Response body (mandatory)
Write the text of the response that will be sent to the recipient(s). To go faster, you can use the assistance functions (insertion of a response template, introduction messages, etc.). The editing options allow you to format the text as you wish: font size, colour, bold, etc.

3. Select a criterion to qualify the folder and validate your choice.
4. When the email is ready to be sent, click the button:

   Validation: ALE Connect sends the folder for validation to your supervisor for verification. After clicking the button, the Validation (closed) status is applied to the folder sent to the supervisor. The supervisor will then receive the folder, can reread your reply, then accept or refuse it.

   Send and wait: the reply is sent to the contact pending further information from him/her. The folder is stored in the desktop of process folder with the Waiting for contact status. When the contact replies, the folder returns to the desktop of in progress folders with the Contact reply status.

   Send and close: the answer is sent to the contact. The Closed status is applied to the folder stored in the desktop of processed folders. If the contact sends a new message related to this folder, the To be processed status is applied to the folder which returns to the desktop of in progress folders.

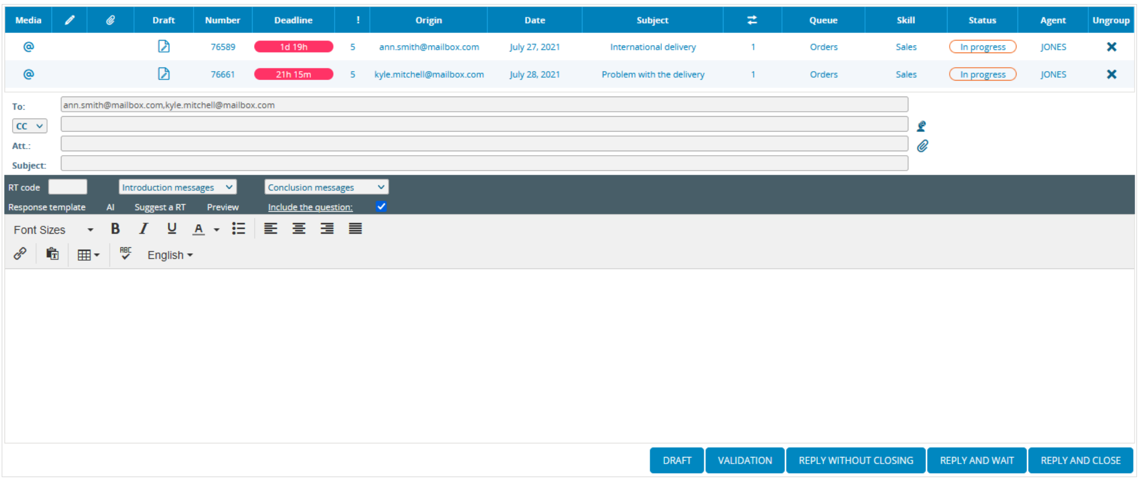
5.10 Sending a grouped email

To optimise the folder processing (and therefore improve the quality of service), you can write a grouped response by sending a single email to several contacts with the same request. This method is useful to process frequently asked questions (for example, how to access your customer account when you lost your password).

Warning: this grouped action is available only if the selected folders all belong to the same queue.

1. Click the **List of folders** button ( ).
2. If necessary, perform a folder search.
3. Check the folders you wish to respond to.
4. Click the **Group** button ( ).
5. Select the **Process** grouped action.

   The following screen is displayed:



   The upper part of the screen displays the **list of grouped folders**; the lower part presents the **email** to write. The recipients are pre-filled in with the contact's email addresses, inherited from the folders in progress. It is impossible to modify or clear them.

6. Enter eventually the email addresses of the recipients in copy (**CC**) or in blind copy (**BCC**).

   Enter a comma between each email address, with no spaces before or after.

7. Add attachments if necessary.
8. Enter the subject of the response.
9. Type your message in the provided area.

   You can use the writing help tools (insertion of a response template, introduction message, etc.) as well as editing options to format the text as you wish (font size, colour, bold, etc.).

   Warning: in the case of a grouped response, the variables are not managed in response templates and introduction messages.

10. When you have finished, send your response by clicking the chosen button.

5.11 Email address formats

ALE Connect is compatible with the most common email address formats. An email address will therefore be authorised if it meets the following criteria:

- Global structure

  `localpart@domain`

- ASCII norm

  `a-z A-Z 0-9`

- Special characters

  ``!#$%&'*+/=?^_`{|}~-.``

- Accented characters

  `àâäéèêëôöùûüÿç`

Warning: any email address that does not respect the rules above will not be supported by ALE Connect. This applies particularly to email addresses including:
- double quotes in the local part. Ex: "[[test]]"@test.org
- escape characters. Ex: "Doug \"Ace\" L."@test.org
- IP domains. Ex: first.last@[IPv6:::12.34.56.78]

6 Chat

Warning: requires an ALE Connect license including all interaction channels.

ALE Connect allows you to chat with web users, in order to answer in real time to their requests or questions.

In order to bring appropriate answers, ALE Connect gives you the possibility to:

- manage several conversations at the same time,
- query the knowledge base for help to the reply,
- write well and quickly thanks to the autocompletion,
- transfer a conversation to another realtime queue,
- view in real time the contact data and his/her history,
- qualify the request,
- send an outbound email to the contact during the conversation,
- temporarily stop the distribution of chats to focus on one or several interactions in particular.

Meanwhile, the web user can download the history of the conversation and get an estimate of the live waiting time.

6.1 Supporting a chat

When a web user starts a chat, ALE Connect searches an agent to establish the connection according to the skills and availability of the agents at that time, but also according to the distribution criteria defined by the coordinator.

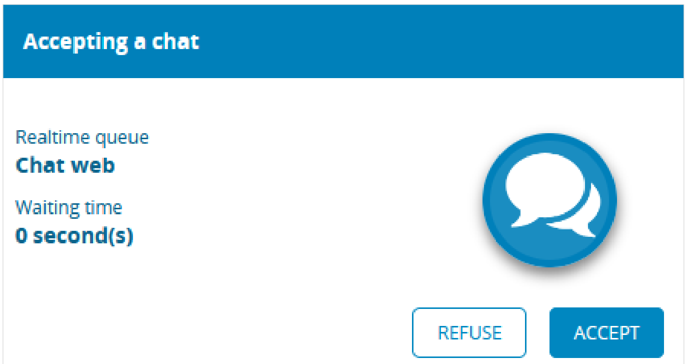
The chat interactions are always distributed in push mode.

6.1.1 Prerequisites

- Your current operational status allows to support chat conversations (Push Chat).
- You have at least one skill with a level higher than 0 for the realtime queue in which chat conversations arrive.
- You have not reached your maximum allowed quota of simultaneous chat conversations.

6.1.2 Step 1: chat arrival

It is materialised by a pop-up window that is automatically displayed in the lower right corner of your interface.



The pop-up window displays in order:

Realtime queue
Name of the realtime queue in which the chat is stored.

Waiting time
Cumulated waiting time of the web user, expressed in seconds, since his/her first request for contact. It can be null if the web user has not been placed in a realtime queue (None displayed).

Last name / First name
Last name and first name of the web user if identified in the contact database.

Note: if the web user cancels his/her connection request while the window is displayed, it is automatically closed and a stealth message informs you.

6.1.3 Step 2: choice of the action

When the window is displayed, you have 3 possibilities:

You accept the request. You are then connected with the web user. Your interface is modified: the chat remote control is displayed in the banner and a new folder is opened in a new tab in the foreground, named with the number assigned to the folder. You can now process the chat.

You refuse the request. ALE Connect distributes the chat to another agent with the same rights, who can accept, refuse or ignore it.

You ignore the request. If you do not click either button, the pop-up remains displayed until the chat is distributed to another agent with the same rights, who can then accept, refuse or ignore it.

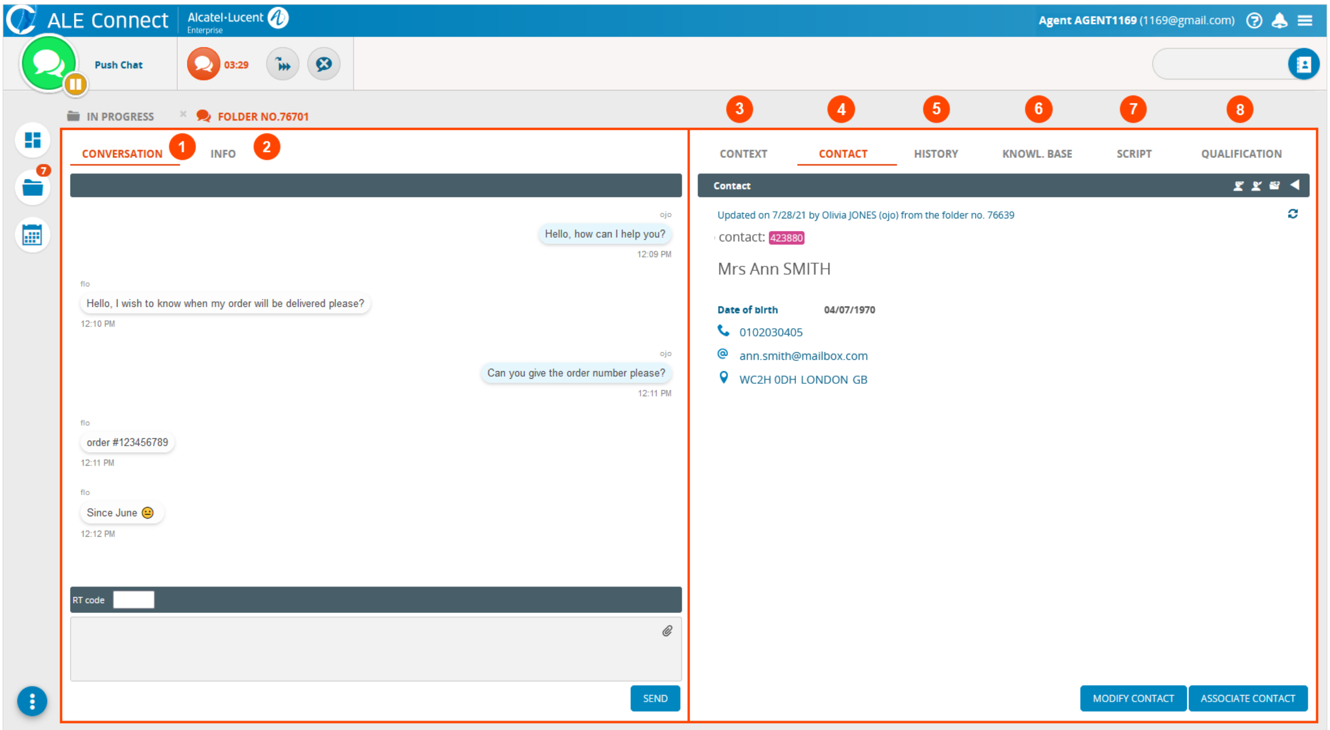
Warning: at the end of a time limit defined by the coordinator, if no agent responds to the web user's request, the web user is dissuaded by the system and his/her chat request is cancelled.

6.2 Introducing the chat folder

When you accept a chat, your interface is modified:

- A **new tab** is displayed in your workspace: it shows the **folder number**.
- A remote control is displayed in the banner: its functions are active and allow you to process the current conversation.
- The **Pause** button of your operational status is activated: it allows to stop the chat distribution.

6.2.1 Overview



The folder is divided into two vertical parts: on the left, the tab dedicated to the conversation, on the right the assistance functions.

1. Conversation
2. Info
3. Context
4. Contact
5. History
6. Knowledge base
7. Script
8. Qualification

6.2.2 Conversation tab

Displayed by default, it shows **the entire conversation** and allows you to interact with the web user. The messages are transcribed exactly as entered, including emojis. Each participant is identified by his/her pseudo. All messages are presented as **chat bubbles**. The lower part of the tab allows you to **write and view your answers**, before they are sent. To speed up the entry and the response time, you can insert a response template from the knowledge base.

If you are dealing with several conversations at the same time and you switch from one conversation to another, a visual indicator shows you which messages have not been read: they appear in blue and the others in grey.

6.2.3 Info tab

It identifies the contact and the folder related to the current conversation.

General information

Contact
First name, last name and ID of the web user identified, if existing in the contact database. This information is displayed either because the system was able to collect them, or because you have associated the contact with the folder during the conversation. Otherwise, ALE Connect only displays the new ID that will be assigned to the web user, once the conversation is over. A contact sheet will be automatically created at the end of the conversation.

Realtime queue
Name of the realtime queue in which the chat has been directed by the system.

Waiting time
Total time elapsed since the chat request was supported by the system.

Folder number
Folder number automatically assigned by the system to the current chat.

Last events

If the web user is identified, i.e. if his/her contact sheet has been associated with the conversation in progress, this area shows the last 3 events related to him/her (emails, previous calls, etc.). If you click an event, the corresponding folder is opened in the History tab. Otherwise, this area is empty. The **Refresh** button (🗘) allows you to refresh the list.

Subject

This area allows you to specify the reason for the current conversation. The data entered in this area is automatically saved at the end of the wrap-up period and will be available in the folder classified in the Processed desktop. By default, it presents the following fields (see the ALE Connect administrator for customisation):

Subject (mandatory)
By default, this field is filled in with the "Chat with ..." value followed by the web user's name as detected by the system from the chat widget, or the associated contact sheet. It can be modified if necessary.

Notepad
Enter any information you think is useful here. It will be displayed in the notepad of the corresponding folder, once processed. The entry area can be enlarged or reduced at will, by clicking the lower right corner represented by the ⠴ icon.

6.2.4 Context tab

It allows you to view information related to the web user, and the browsing context. This data is automatically provided by the chat widget, i.e. the dialogue box from which the web user is chatting, but also by the environment from which the web user has requested the current conversation.

Find out more about the tab

6.2.5 Contact tab

It allows you to identify the web user at the beginning of the conversation and, if necessary, to update his/her sheet.

Find out more about the tab

6.2.6 History tab

It allows you to view the history of folders already saved for the web user. This tab is displayed only if the contact has been identified in the ALE Connect database. Otherwise, it is hidden.

Find out more about the tab

6.2.7 Knowledge base tab

It allows you to process the folder more quickly, by picking response templates to the issues submitted by the web user. Warning: the attachments eventually associated with a response template are not displayed.

Find out more about the tab

6.2.8 Script tab

It allows to guide the conversation with the web user. This tab is optional: it is only displayed if the coordinator has configured a script to process chats. Otherwise, it is hidden.

Find out more about the tab

6.2.9 Qualification tab

It is possible to qualify the interaction by assigning one or several criteria to it. This tab is displayed only if these qualification criteria have been defined for the queue in which the chat is arrived. Otherwise, it is hidden.

Find out more about the tab

6.3 Processing a chat

The processing consists in writing to the web user in order to respond to his/her request. The conversation starts after accepting the chat, when the folder is opened on your ALE Connect interface.

You can process several chats simultaneously; the maximum number allowed being set by the coordinator. Once this number is reached, you are considered as unavailable by ALE Connect, and chat interactions will no longer be distributed to you. **However, as soon as the chat starts, ALE Connect can no longer push you any interactions for other media (calls, etc.).**

6.3.1 If you had tasks in progress

All tasks in progress when you have accepted the chat remain in progress, and are subject to one or several separate tabs. You can switch from the chat to another previously opened task, by browsing between the different tabs (or by clicking the remote control if you are processing several chats at the same time).

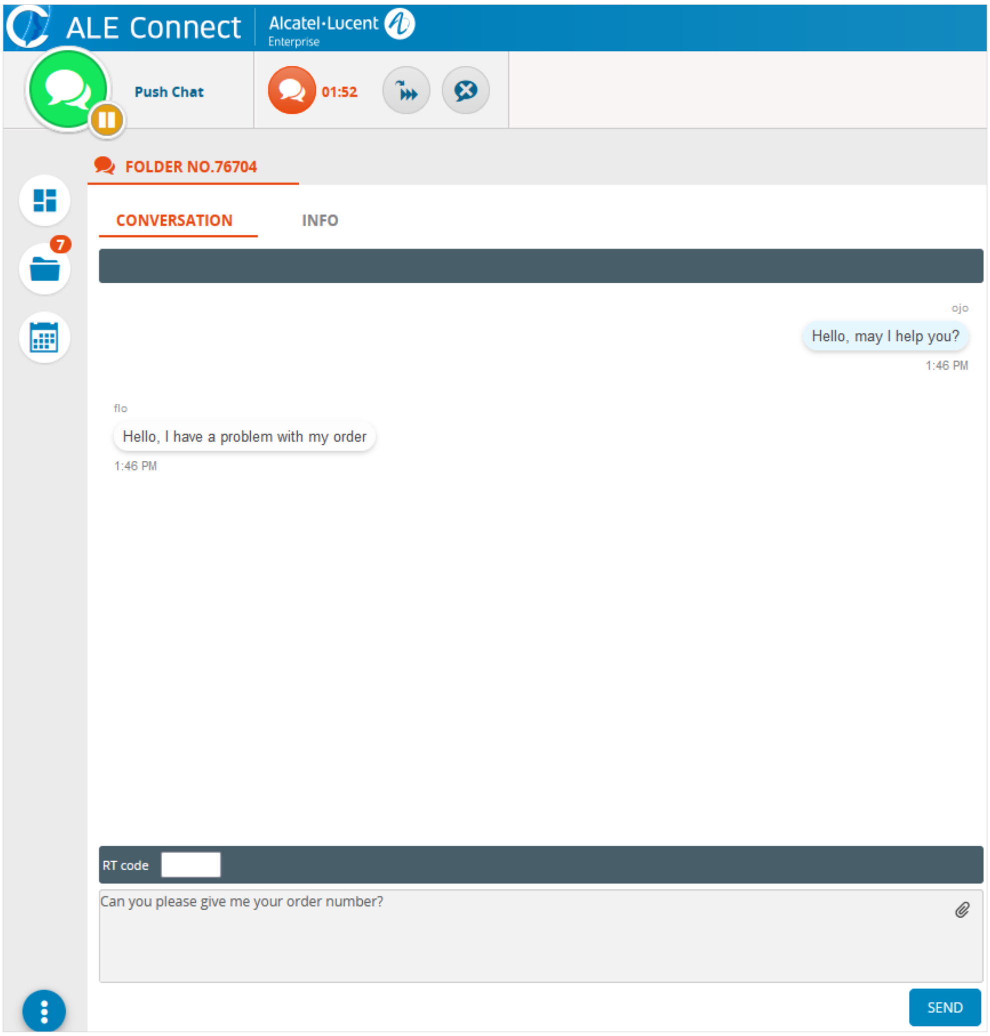
During a chat, you can always perform the following actions:

- send a spontaneous email to the person of your choice,
- view the list of in progress or processed folders,
- process another folder in pull mode,
- use the taskbar functionalities.

6.3.2 Procedure

As soon as you are connected with the web user, the folder is opened in your ALE Connect interface.

1. The web user writes and sends you a first message:



2. When it is your turn to write, type your message in the entry area at the bottom of the screen.
3. To go faster, do not hesitate to insert a response template when the contact request allows it: from the knowledge base, by entering its RT code, by autocompletion, or manually by copying and pasting.

   You can also attach one or more files to your message and send them to the web user.

   If available, do not forget to use the conversation guide which is displayed on the **Script** tab.
4. Click **Send** or press the **Enter** key.
5. The web user receives your message on the application from which he/she writes and replies to it.

6. Continue the conversation until the web user's request has been processed.
7. When you have finished, click the **End the conversation** button () from the remote control.

   Note that the web user can also end the conversation on his/her own. In both cases, the consequence is the same: you switch to the wrap-up phase. You can now finalise the processing of the folder.

6.3.3 The web user is inactive

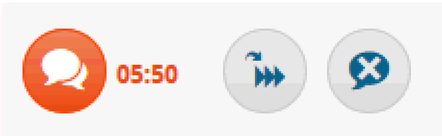
When the web user has not given any news for some time, he/she is warned by a message (which can be customised) that the chat will soon be closed. In addition, a warning is also displayed on your interface for information.

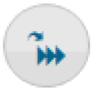
The inactivity timeout before displaying the warning message and the time allocated before closing the conversation are defined by the administrator. Without any reaction from the web user, the chat conversation is closed. In the same way, if the web user leaves the conversation, you are informed.

6.4 Using the remote control

During a chat, a remote control is displayed in the banner of the interface as soon as the chat starts. It allows you to act on the current conversation.

A timer is displayed and the function buttons are active:



Button	Function	Display	Use
	Chat in progress timed	Permanent	Duration of the conversation displayed in real time. The timer countdown starts as soon as you accept the chat (or when it is automatically opened in the case of auto-acceptance) and the tab is opened in your workspace. It cannot be paused.
	Wrap-up	Only when the conversation is over	Countdown of the time remaining to finalise the folder. The duration reserved for this task is set by the platform administrator.
	Requalification	Permanent	Transfers the current chat to another realtime queue.
	End	Permanent	Ends the chat with the web user.

6.5 Attaching files to a chat

When processing a chat, you have the possibility to send files to the web user (PDF, images, sounds or videos). The maximum size allowed per file is 20 MB. All the attachments posted by the web user or yourself during the exchanges are visible in the corresponding widget of the chat folder.

Warning! Posting or receiving attachments requires the use of an antivirus software, installed on your computer beforehand. Be very careful before opening attachments posted by the web user, especially if the web user asks you to perform a particular action (e.g. rename the file extension, open an encrypted or protected password file, open a .zip file containing a potentially dangerous file, etc.). **If in doubt, contact your supervisor immediately. In all cases, always ensure that you follow good practice and the IT security guidelines in place in your contact centre.**

6.5.1 Allowed file formats

- **Image**: jpeg, jpg, png, gif
- **Sound**: mp3, wav
- **Video**: mp4, mov, webm, mkv
- **Application**: pdf

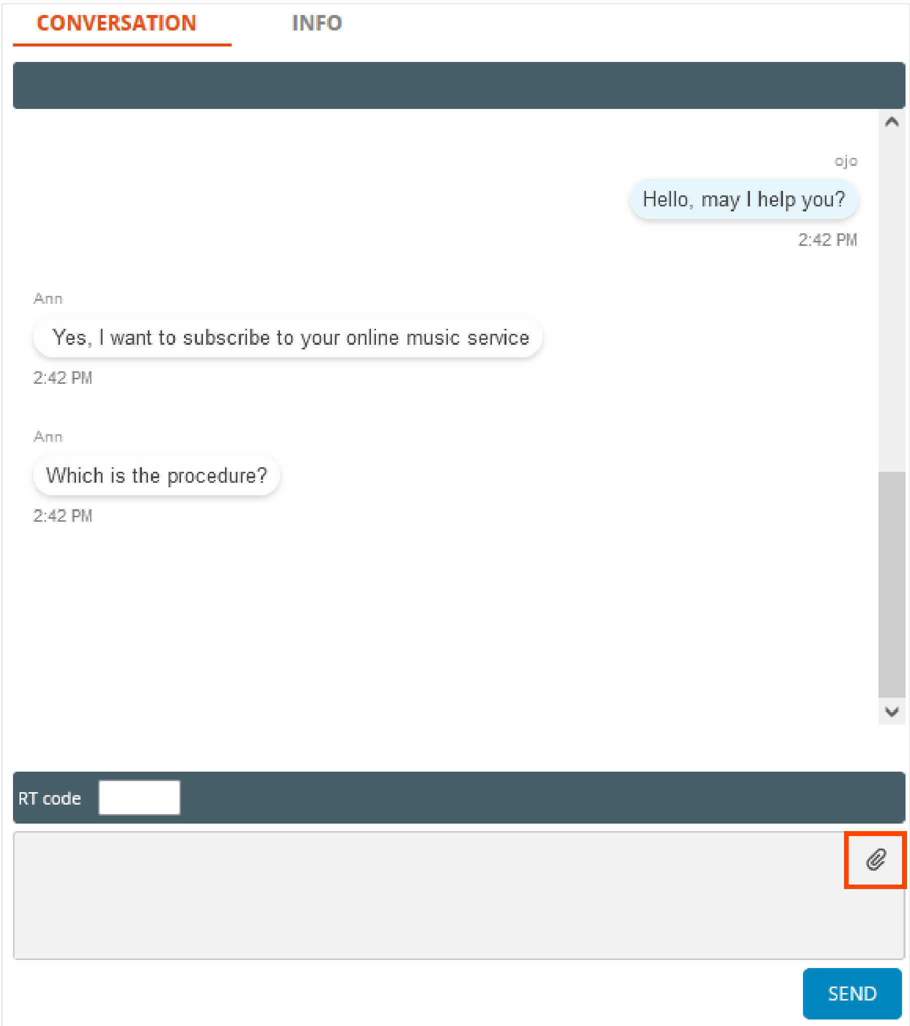
If you try to load a file whose format is not supported by ALE Connect, the load is refused and a notification is displayed in your interface.

6.5.2 Adding an attachment

By default, a maximum of 5 attachments can be posted during a chat. If an error occurs during loading (invalid file, size larger than the allowed limit, etc.), a notification is generated to alert you. ALE Connect's antivirus scans every file you send. If no virus is detected, it is added to the conversation. On the contrary, the file is not loaded and a notification is displayed. The antivirus analysis report will be added to the folder as attachment.

However, it is no longer possible to send an attachment to the web user when the chat is over and you are in the wrap-up phase.

1. During the chat, click the 📎 **icon** located in the upper right corner of the entry field, or **drag and drop** the file directly into the conversation area:



If you have clicked the 📎 icon, a window is displayed offering you to select files. By default, only allowed file types are displayed.

2. Select the files to be attached.

Note: it is possible to perform a multiple selection by pressing the key combination <Ctrl> + <Shift> + <Down arrow> / <Up arrow>.

3. Click **Open**.

The loading of the attachment starts and you can see its progress.

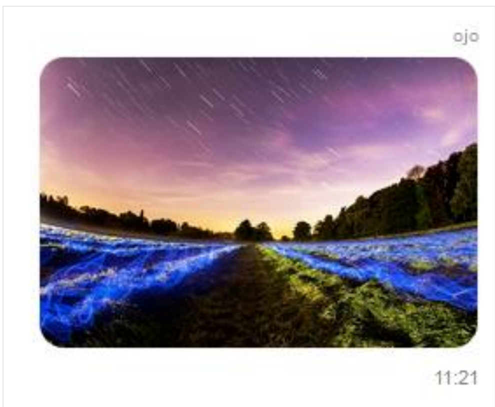
You will then view the attachment within the conversation, in the form of:
- a hyperlink if it is a PDF file,
- a thumbnail if it is an image,
- a multimedia player if it is an audio file or a video.

6.5.3 Viewing an attachment

You can view the contents of an attachment at any time during the chat, regardless of whether it was posted by the web user or you. To play audio files and videos, ALE Connect uses the browser's multimedia player.

1. During the chat, the web user sends you (or you send) an attachment.

   It is displayed within the conversation, as a new message:



2. Click the **file** to view it.

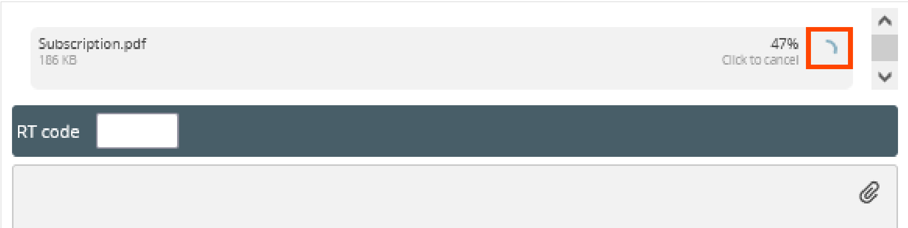
   If the attachment is an image or a PDF file, it opens in a new browser tab.

   If it is an audio or video file, simply start playing it using the default media player.

6.5.4 Cancelling an attachment

This action is only possible while the attachment is being loaded. You therefore have a limited amount of time because, once the upload is complete, the action disappears: the attachment has been sent to the web user.

1. During the chat, you have sent a file to the web user and it is loading:



2. Click the **icon** of the current upload, located to the right of the **Click to cancel** words.

   ALE Connect will immediately stop sending the attachment.

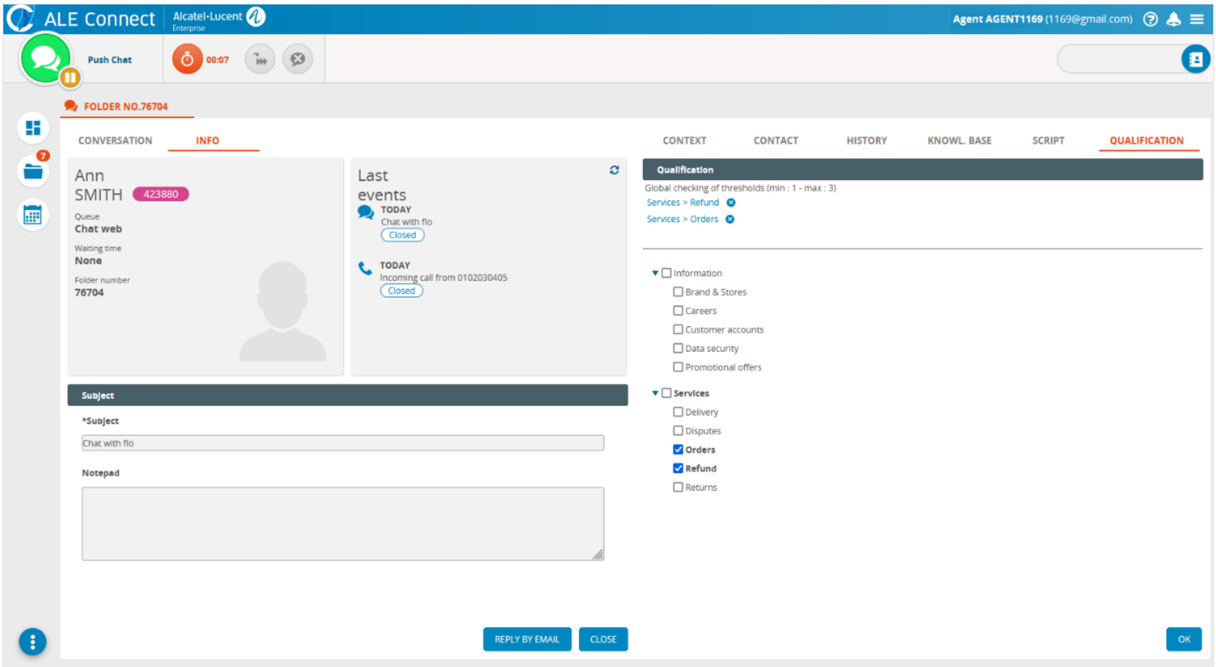
6.6 Ending a chat

You simply need to click the **End the conversation** button (⊗) from the remote control in the banner. Note that the web user can also end the conversation on his/her own. In all cases, you enter the **wrap-up** phase: by default, you have 30 seconds to finalise the folder. This deadline is set up by the coordinator. It is represented by a timer in the remote control. At the bottom of the screen, several buttons are displayed in the Info tab: you can choose what to do with the folder. Without any action, this tab will be automatically closed at the end of the wrap-up time.

Contrary to the end of an incoming call, you are considered as available during the wrap-up time: ALE Connect can distribute other chats to you as long as you have not reached your maximum quota of simultaneous conversations.

6.6.1 Finalising the folder

1. Click the **End the conversation button** (⊗) from the remote control.



2. Assign qualification criteria to the folder in the corresponding tab.

   Depending on the ALE Connect setup, the qualification may be optional. If this is not performed before the end of the wrap-up time, the interaction will be closed without qualification.

3. Click the button corresponding to the desired action:

   Reply by email: allows you to reply to the web user's request by sending him/her a spontaneous email. This will be associated by default with one of the email queues to which you have rights. This email will be merged into the folder once the conversation is closed.

   Close: allows you to close the folder before ALE Connect does it automatically, when you do not wish to wait for the end of the wrap-up time. If the qualification of the folder is mandatory and you have not yet performed so, ALE Connect automatically displays the Qualification tab. ALE Connect then closes the folder with the Closed status and stores it in the Processed desktop.

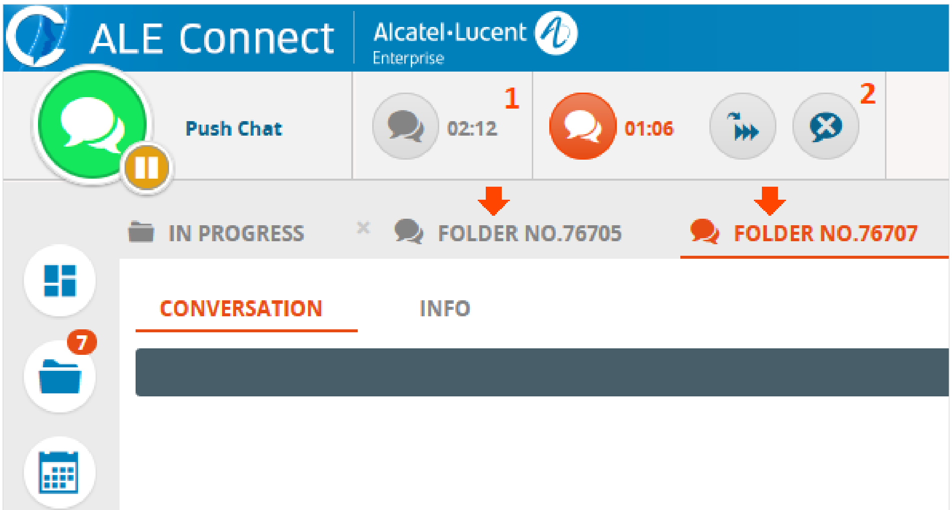
6.6.2 The wrap-up time is over

At the end of the wrap-up time, ALE Connect:

- automatically closes the chat;
- closes the corresponding tab and hides the remote control;
- validates the creation of the folder then classifies it in the desktop of processed folders.
- creates a contact sheet by collecting the web user's information, only if no contact from the database has been associated with the conversation.

6.7 Managing multiple chats

You have the possibility to process several chats at the same time, within the limit of the quota defined by the coordinator. For example, if the quota has been set to 5 simultaneous chats and you are already processing one, ALE Connect can distribute 4 more. The rules of use are the same as if you were processing one.



From the moment you accept a second conversation, your interface is automatically updated:

- There are **one opened tab** and one <u>remote control</u> by chat in progress.
- The **active remote control** corresponds to the chat for which the red tab is opened in the foreground.
- The **other remote controls** are reduced, greyed out, and only display the timer.

In addition, ALE Connect informs you when you receive messages from the web user:

- If the conversation is in the background, the corresponding tab **starts flashing** slowly.
- A **pictogram** ( ) is displayed on the tab when the web user is writing a message.
- The **tab colour** turns red when the web user has sent a new message and you are not positioned on this tab (= no focus).

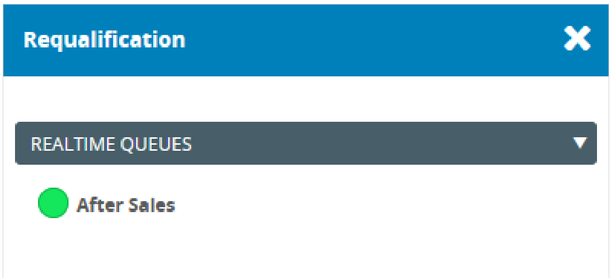
Note: except for the interface, there is no change in the processing of the folder.

6.8 Requalifying a chat

This function allows you to redirect the current chat to another realtime queue, while keeping the same folder number. It is then distributed to another agent who can view a pop-up window on his/her screen. Once the recipient agent has accepted, the chat can resume between the agent and the web user where it was interrupted. The context data as well as the qualification criteria are saved as originally defined. However, the skill of the folder changes: it becomes the one of the realtime queue to which the chat has been redirected.

Warning: if the web user interrupts the chat during its redirection, a folder is created anyway and linked to the realtime queue and the initial agent. The folder status is "Not Closed (Requalification)".

1. During the chat, click the **Requalification** button () from the remote control.

   ALE Connect displays the realtime queues for which at least one agent is logged in, who has read and write rights on a chat queue, and with an operational status allowing the chat processing.

2. Select the **realtime queue** on which the chat must be redirected.

   At least one agent is currently available on this realtime queue and able to support a chat.

   There are currently no agents logged in and able to support a chat (either because they have reached the maximum quota of simultaneous chats, or because they have stopped the chat distribution).

3. ALE Connect redirects the chat in its entirety to another agent.

   The conversation is over on your side. The corresponding folder is transferred with it. You are now eligible for a new chat.

6.9 Stopping the chat distribution

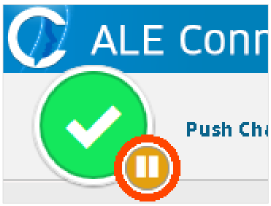
A chat is always pushed by ALE Connect (push mode) because it needs to be processed in real time, as the web user writes. If necessary, you have the possibility to temporarily suspend the chat distribution because:

- **you are working on a complex case which needs search, for example.** You cannot therefore manage several conversations at the same time, while guaranteeing a quality of service to web users. In that case, you prefer not to receive new interactions temporarily.
- **you want to take a break.** By requesting to stop the distribution, you will be able to finish the current chats. Indeed, it is not possible to switch to the pause status as long as at least one conversation is in progress.

Once the distribution is stopped, you are no longer considered as available. This fact is taken into account to calculate the number of web users that can be put in realtime queue.

6.9.1 Stopping

1. Click the **Pause** button located to the right of your operational status, in the banner of the interface:

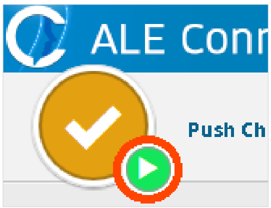


> **Warning:** this button is displayed only if you are logged in with a chat push status. It is activated as soon as a chat is in progress.

2. ALE Connect stops the distribution of chat conversations. The colour of your operational status changes to orange.

6.9.2 Restarting

1. Click the button to reactivate the distribution whenever you wish:



2. ALE Connect restarts the distribution of chat conversations. The colour of your operational status changes to green.

Note: if the restart follows a pause status, you do not have to perform any manual action. Switching to a push status automatically activates the distribution.

6.10 When the web user is disconnected

During a chat, the web user may be disconnected for multiple reasons such as a network failure for example. A process, automatic and transparent to the agent, is then triggered to avoid losing the conversation, whatever the origin of the disconnection. The web user can try to reconnect via the chat widget, i.e. the website dialogue box from which he/she chats with the agent. If these attempts are successful, the online dialogue will resume as usual.

However, if at the end of a timeout defined by the administrator (30 seconds by default), ALE Connect does not detect any activity from the web user, the chat is automatically closed and a folder is created.

Warning: during the network failure period, the chat remains as it is. The reconnection process is completely transparent to the agent.

7 Facebook Messenger

Warning: requires an ALE Connect license including all interaction channels.

Messenger is the instant messaging system provided by the social network Facebook. ALE Connect allows you to interact with web users who use Messenger, in order to process their requests. These interactions arrive in the desktop of in progress folders, as emails for example, with a status and a processing deadline.

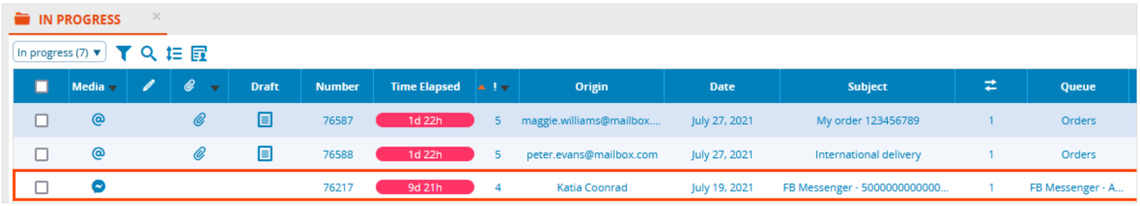
ALE Connect provides you various functionalities allowing to:

- view the knowledge base for help with the reply,
- write well and fast thanks to response templates,
- customise the conversation with animated GIFs,
- view in real time the contact data and his/her history,
- qualify the request according to specific criteria,
- send an email response to the contact during the conversation,
- put on hold or close a conversation when necessary.

7.1 Supporting a Facebook Messenger interaction

Facebook Messenger interactions arrive in the desktop of in progress folders and are processed in pull mode. You must therefore view the list of folders yourself to select the one to be processed.

1. Open the desktop of in progress folders.
2. If necessary, perform a folder search.



A Facebook Messenger interaction is characterised by:

- an icon  identifying the Facebook Messenger media,
- its origin which corresponds to the web user's Facebook pseudo,
- a creation date corresponding to the time when the folder was created in ALE Connect,
- its subject that indicates the Facebook Messenger media.

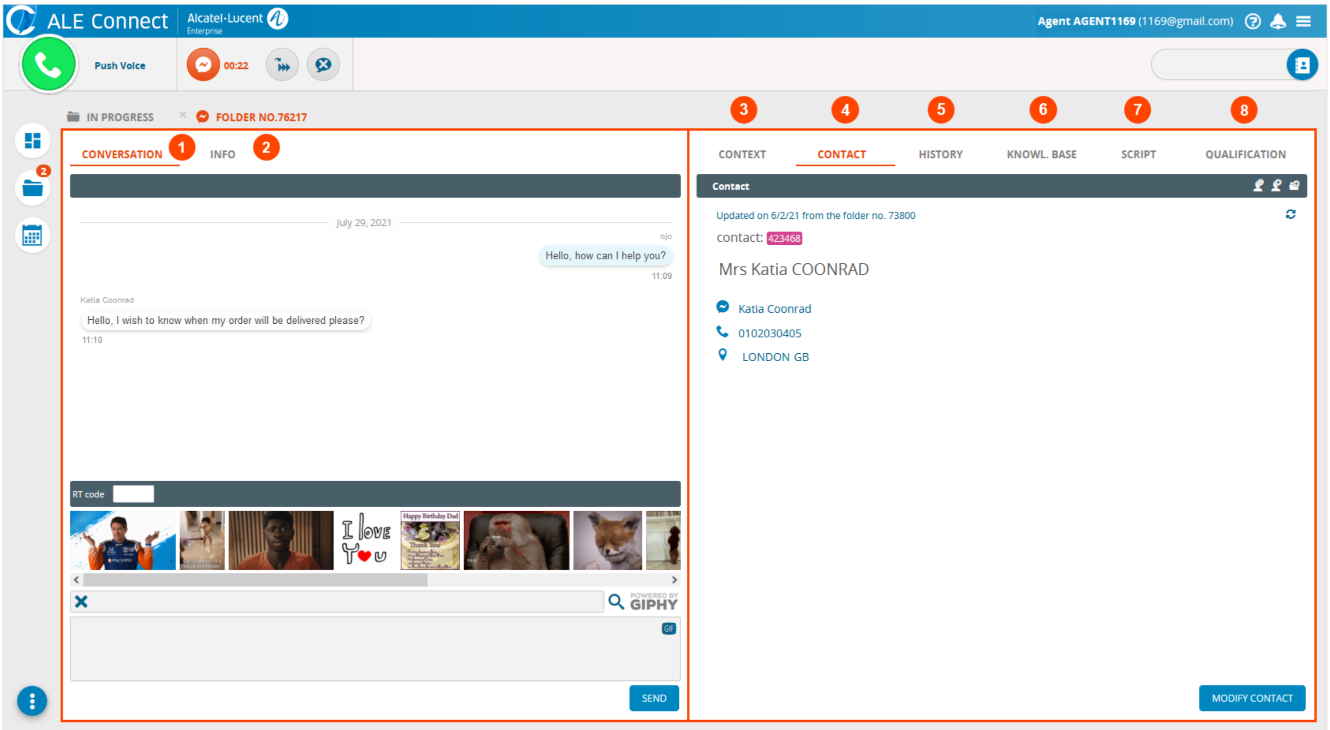
3. Click the Facebook Messenger folder you wish to process.
4. It is opened on screen: you can start its processing.

7.2 Introducing the Facebook Messenger folder

When you support a Facebook Messenger interaction, your interface is modified:

- A **new tab** is displayed in your workspace: it shows the **folder number**.
- A remote control is displayed in the banner: **its functions are active** and allow you to act on the current conversation.
- The **remote control** and the folder **tab are linked**: if you click another tab, the remote control is reduced and then only displays the timer.

7.2.1 Overview



The folder is similar to a chat folder. It is divided into two vertical parts: on the left, the conversation flow, on the right the assistance functions.

1. Conversation
2. Info
3. Context
4. Contact
5. History
6. Knowledge base
7. Script
8. Qualification

7.2.2 Conversation tab

Displayed by default, it shows **the entire conversation** and allows you to interact with the web user. ALE Connect displays the history of previous exchanges, if existing, in chronological order. The messages are transcribed exactly as entered, including emojis. They are represented as **chat bubbles**. When the folder is opened, messages sent on both sides are visible in real time without the need to close and reopen the folder. You are identified by your pseudo. The web user is identified by his/her first name and last name automatically retrieved by ALE Connect: they can be used to search the contact in the database.

You can watch the **videos** or listen to the **sounds** posted by the web user during the conversation. They will be played with the player specific to the web browser you are using.

Warning: due to changes to the Messenger APIs by Facebook in December 2020, videos and sounds are currently not supported by ALE Connect. In a user posts this type of content in his/her message, it will not be displayed in the affected ALE Connect folder.

The lower part of the tab allows you to **write and view your answers**, before they are sent. You can add animated GIFs to illustrate your response. To speed up your entry, you can insert a response template from the knowledge base.

7.2.3 Info tab

It identifies the contact and the folder related to the current conversation.

In the **General information** area, you can view the first name, last name and ID of the web user. This information is displayed when a contact sheet has been associated with the folder during the conversation. Otherwise, ALE Connect will only display the new ID that will be assigned to the web user, once the conversation is over (a contact sheet will be automatically created).

ALE Connect also displays the waiting time, i.e. the total time elapsed since the conversation request was supported by the system, and the folder number automatically assigned.

If the web user is identified, i.e. if a contact sheet has been associated with the current conversation, the **Last events** area presents for information the last 3 events related to it (emails, previous calls, etc.). If you click one of them, the corresponding folder is opened in the History tab. Otherwise, this area is empty. The **Refresh** button (↻) allows you to refresh the list.

The **Subject** area allows you to view/specify the reason of the conversation in progress: by default, the subject indicates "FB Messenger ..." followed by the web user's name as detected by the system, or from the associated contact sheet. It can be modified if necessary. The data entered in this area is automatically saved at the end of the wrap-up period and will be available in the folder classified in the Processed desktop.

The **Notepad** allows you to enter any information you think useful. It will be displayed in the notepad of the corresponding folder, once processed. The entry area can be enlarged or reduced at will, by clicking the lower right corner .

7.2.4 Context tab

It allows you to view information related to the web user and the browsing context. This data, which cannot be modified, is automatically provided by ALE Connect.

Find out more about the tab

7.2.5 Contact tab

When the folder is opened, ALE Connect searches in its database all the contacts with the same first and last name as the web user who initiated the Messenger conversation. Once identified, you can view here the information extracted from the contact sheet and especially his/her first and last name on Facebook. The contact is automatically associated as soon as the folder is created, when its sheet has been found in the database.

However, in the case of Messenger conversations, this automatic association is possible only when a first Facebook Messenger folder has already been created for this contact. **In other words, any first Facebook messenger folder must be associated manually with the corresponding contact in the database (if it exists). Otherwise, a new contact sheet should be created.**

Note: when a contact that already exists in the database updates his/her profile (ex: change of photo), his/her social identity is automatically updated when a new message is received in ALE Connect.

When the search finds several contact sheets (homonyms), ALE Connect presents in the tab the list of compatible sheets. You can then associate the contact manually with the folder. The suggested sheets display the last name, first name and, if available, the profile photo. If no sheet is found, ALE Connect displays the contact search engine.

In all cases, at the end of the wrap-up time (folder closing), if no existing contact has been associated with the folder, a new contact sheet is created and associated with the folder.

Find out more about the tab

7.2.6 History tab

It allows you to view the history of folders already saved for the web user. This tab is displayed only if the contact has been identified in the ALE Connect database. Otherwise, it is hidden.

Find out more about the tab

7.2.7 Knowledge base tab

It allows you to process the folder more quickly, by picking response templates to the issues submitted by the contact. Warning: the attachments eventually associated with a response template are not displayed.

Find out more about the tab

7.2.8 Script tab

It allows you to control the conversation with the web user. This tab is optional: it is only displayed if the coordinator has configured a script to process Messenger conversations. Otherwise, it is hidden.

Find out more about the tab

7.2.9 Qualification tab

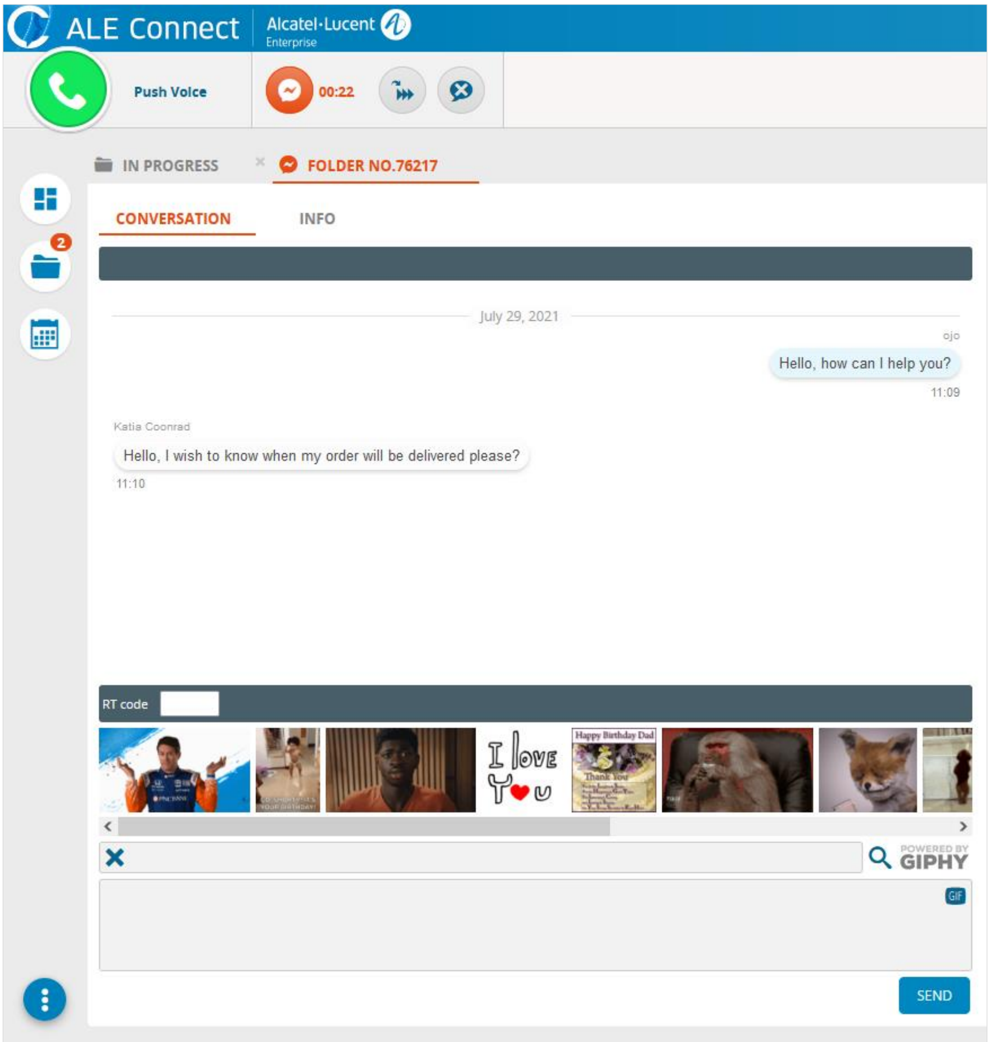
It is possible to qualify the interaction by assigning one or several criteria to it. This tab is displayed only if these qualification criteria have been defined for the queue in which the folder is arrived. Otherwise, it is hidden.

Find out more about the tab

7.3 Processing a Facebook Messenger conversation

The processing consists in writing to the web user in order to best respond to his/her request. Unlike chat, this exchange can be performed asynchronously: when you are processing his/her request, the web user is not necessarily in front of his/her screen, logged in to Messenger. However, nothing stops you from replying because your messages will be saved in the folder. The processing starts as soon as the folder is opened on your ALE Connect interface. You can process up to 9 Messenger folders simultaneously.

1. After supporting the folder, it opens in your ALE Connect interface.
2. Read the message(s) sent by the web user:



3. When it is your turn to write, type your message in the entry area at the bottom of the screen.

   To go faster, do not hesitate to insert a response template when the contact request allows it: from the knowledge base, by entering its RT code, by autocompletion, or manually by copying and pasting.

   If available, do not forget to use the conversation guide which is displayed in the Script tab.

4. Click **Send** or press the **Enter** key.

   The web user receives your message on his/her Facebook Messenger interface.

5. The web user replies to your last message.

6. Continue the conversation until the web user's request has been processed.

7. When you have finished, click the **End the conversation** button () from the remote control.

   You enter the wrap-up phase. You can now finalise the processing of the folder.

7.4 Inserting animated GIFs

GIF (Graphics Interchange Format) is an image format commonly used on the Web. An animated GIF is a variant: this GIF file includes a series of ordered images, displayed very quickly in a loop, thus allowing to obtain a short animation. Usually comical or parodic, they are used to illustrate a situation, a thought or an emotion.

In ALE Connect, when you are processing a Facebook Messenger interaction, you have the possibility to customise your messages by inserting animated GIFs. They come from an external library integrated into ALE Connect (GIPHY website). The web user can also post animated GIFs in his/her messages: they will be displayed in the conversation tab of the folder.

Any animated GIF posted is considered as a response to the folder, in the same way as a text message (same effects on the folder).

1. Open the Facebook Messenger folder to process it.
2. When it is your turn to respond, click the **GIF** button located in the right corner of the entry area:

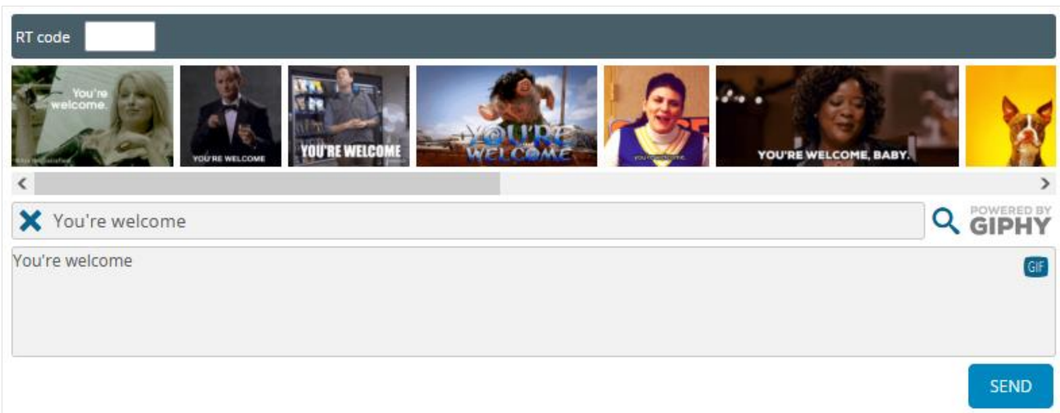
   A list of the first 100 results sent back by the GIPHY website is automatically displayed, above the writing area: by default, these are the animated GIFs corresponding to the text of your message.

3. If you search any GIFs on a particular theme, enter the **keywords** on the entry area.

   By default, this is the text of your message (if you have entered one). You can clear the search, at any time, by clicking the button.

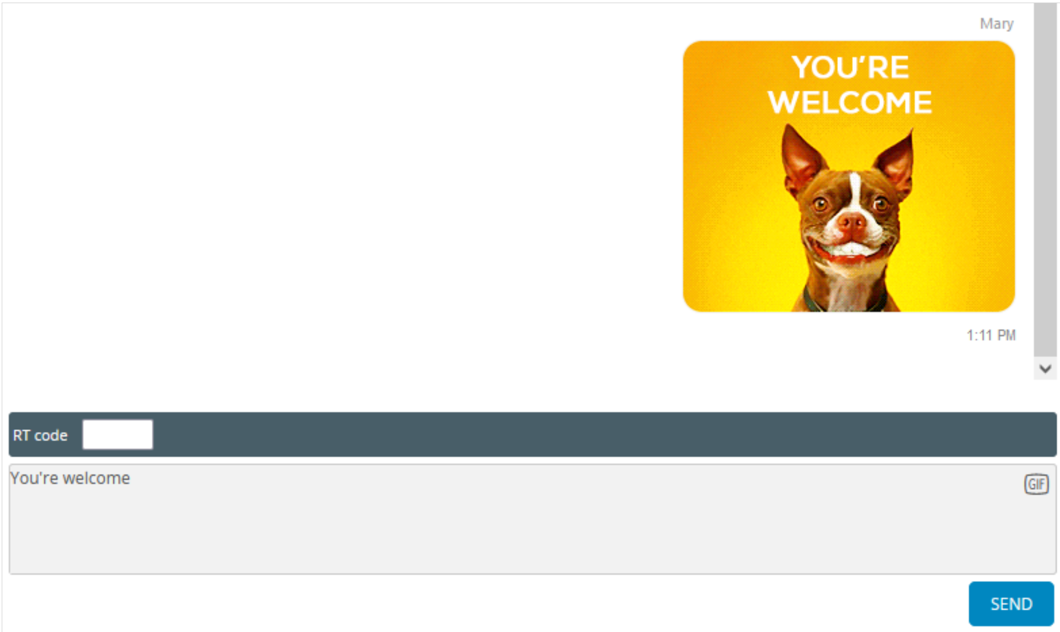
4. Validate your search by clicking the **Magnifying glass** button.

   The corresponding results are displayed:



5. Scroll through the results by moving the vertical bar until you find the animated GIF that interests you.
6. Click the **animated GIF** to insert it directly into the conversation.

   The GIF is displayed in the thread of your conversation:

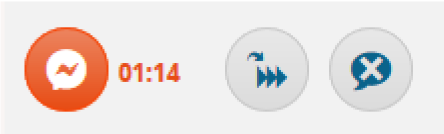


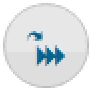
The animated GIF is sent instantly with your message to the web user, who views it in his/her Facebook Messenger interface. The library and search are automatically collapsed.

7.5 Using the remote control

As soon as you start the processing of a Messenger conversation, a remote control is displayed in the banner of the interface. It allows you to act on the conversation in progress.

A timer is displayed and the function buttons are active:



Button	Function	Display	Use
	Conversation in progress timed	Permanent	Duration of the conversation displayed in real time. The timer starts counting down as soon as you open the folder, i.e. when the corresponding tab is opened in the workspace. It cannot be paused.
	Wrap-up	Only when the conversation is over	Countdown of the time remaining to finalise the folder. The duration reserved for this task is set by the platform administrator.
	Requalification	Permanent	Allows to modify the skill associated with the folder.
	End	Permanent	Ends the conversation with the web user.

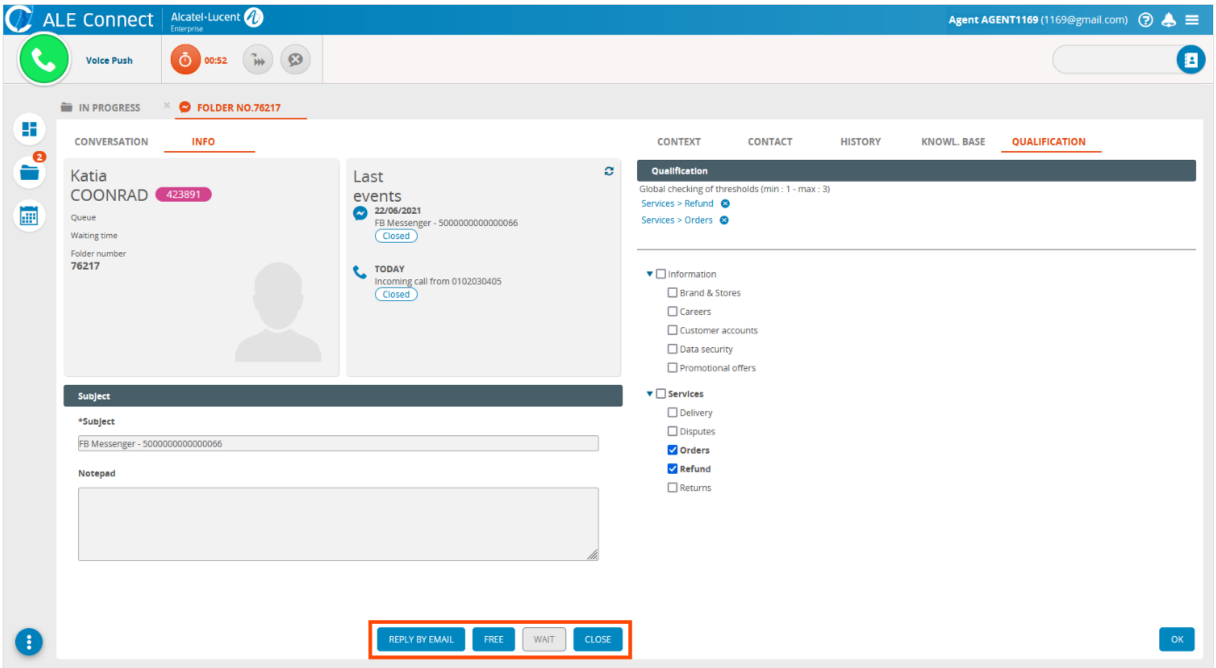
7.6 Ending a Facebook Messenger conversation

You simply need to click the **End the conversation** button () from the remote control in the banner. You enter the **wrap-up** phase: by default, you have 30 seconds to finalise the folder. This deadline is set up by the coordinator. It is represented by a timer in the remote control. If the web user sends new messages, they will not be visible: you have to reopen the folder after closing it to view them. At the bottom of the screen, several buttons are displayed in the Info tab: you can choose what to do with the folder. Without any action, this tab will be automatically closed at the end of the wrap-up time.

Furthermore, do not forget to qualify the folder. If this is not performed before the end of the wrap-up time, the interaction will be closed without qualification.

7.6.1 Finalising the folder

1. Click the **End the conversation button** () from the remote control.



2. Assign qualification criteria to the folder in the corresponding tab.

   According to the ALE Connect setup, the qualification may be optional. If this is not performed before the end of the wrap-up time, the interaction will be closed without qualification.

3. Click the button corresponding to the desired action:

   Reply by email: allows you to reply to the web user's request by sending him/her a spontaneous email. It will be associated by default with one of the email queues to which you have rights. This email will be merged into the folder once the conversation is closed.

   Free: this button is active if you have not replied to the web user's request. It closes the current folder which remains with the To be processed status in the In progress desktop. This action is useful when, for example, you have opened the folder but do no longer wish to process it.

Wait: this button is displayed when you are the last to send a message. If it is the web user who answered last, the button is greyed out (you can however free the folder in this case). The folder is then temporarily put on hold, as the contact information is missing to close it. The folder changes to Waiting for contact status and is stored in the Processed desktop, as in the case of an automatic closing. As soon as the web user sends a new message, the folder changes to the Contact reply status and returns to the In progress desktop.

Close: allows you to close the folder before ALE Connect does it automatically, when you do not wish to wait for the end of the wrap-up time. If the qualification of the folder is mandatory and you have not yet performed so, ALE Connect automatically displays the Qualification tab. ALE Connect then closes the folder that changes to the Closed status and is stored in the Processed desktop.

7.6.2 The wrap-up time is over

At the end of the wrap-up time, ALE Connect:

- automatically closes the Messenger conversation;
- closes the corresponding tab and hides the remote control;
- stores the folder in a desktop according to the chosen action;
- creates a contact sheet by retrieving the web user's information, only if no contact from the database has been associated with the conversation.

8 Twitter DM

Warning: requires an ALE Connect license including all interaction channels.

Twitter is a social network that allows its users to send free short messages called tweets, of up to 280 characters, by SMS or instant messaging. The instant messaging offers the possibility to send direct messages in private to third parties, whether they are individuals or companies.

ALE Connect is needed in this last case: the application allows you to process the requests of web users who contact the company via Twitter, by sending direct messages. Processing these interactions is very similar to Facebook Messenger processing (with some specificities related to Twitter). Since these are both social networks, the offered functionalities are thus quite similar.

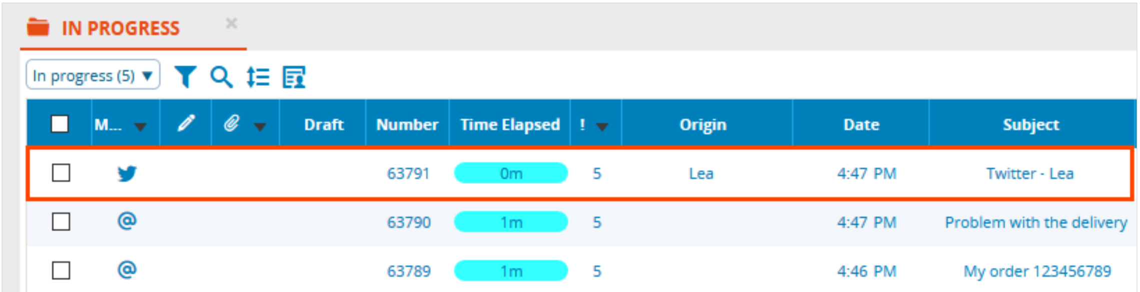
Combined with Twitter DM, ALE Connect allows to:

- reply to direct messages sent by the web user,
- view images, videos and animated GIFs sent by the web user,
- view the knowledge base for help with the reply,
- write well and fast thanks to response templates,
- know the browsing context of the web user,
- view in real time the contact data and his/her history,
- qualify the request according to specific criteria,
- send an email response during the conversation,
- put on hold or close the folder when necessary.

8.1 Supporting a Twitter DM folder

DM Twitter interactions arrive in the desktop of in progress folders. They can only be processed in pull mode: you must therefore search and select manually the Twitter folder to be processed.

1. Open the desktop of in progress folders.
2. If necessary, perform a folder search.



A Twitter DM interaction is characterised by:

- an icon identifying this media,

- its origin that displays the name of the web user's Twitter profile,

- a creation date indicating the date and time when the folder was created in ALE Connect,

- its subject indicating the media followed by the username of the Twitter account (*screen name*).

3. Click the **folder** you wish to process.

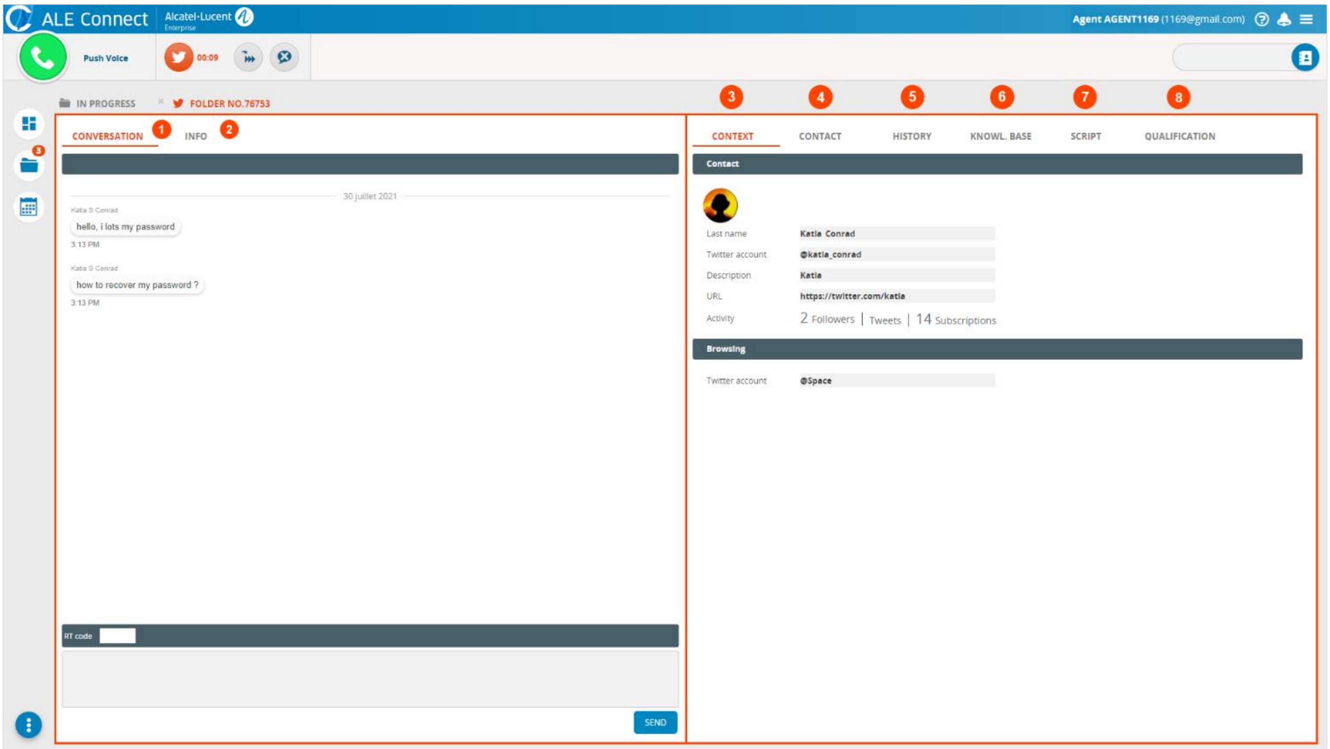
   The folder opens on the screen: you can start its processing.

8.2 Introducing the Twitter DM folder

When you support a Twitter DM interaction, your interface changes:

- A **new tab** is displayed in your workspace: it shows the **folder number**.
- A remote control is displayed in the banner: **its functions are active** and allow you to act on the current conversation.
- The **remote control** and the folder **tab are linked**: if you click another tab, the remote control is reduced and then only displays the timer.

8.2.1 Overview



The folder is very similar to a Messenger conversation. It is divided into two vertical parts: on the left, the conversation flow, on the right the assistance functions.

1. Conversation
2. Info
3. Context
4. Contact
5. History
6. Knowledge base
7. Script
8. Qualification

8.2.2 Conversation tab

Displayed by default, it shows **the entire conversation** and allows you to interact with the web user. ALE Connect displays the history of previous exchanges, if existing, in chronological order. Messages are transcribed exactly as entered. They are represented as **chat bubbles**.

When the folder is opened, messages sent on both sides are visible in **real time** without needing to close and reopen the folder. You are identified by your pseudo as set up by the coordinator. The web user is identified by his first name and last name automatically retrieved by ALE Connect: they can be used to search the contact in the database.

You can view the **images**, **animated GIF** and **videos** posted by the web user during the conversation. These will be played with the player specific to the web browser you are using.

The lower part of the tab allows you to **write and view your answers**, before they are sent. To speed up your entry, you can insert a response template from the knowledge base.

8.2.3 Info tab

It identifies the contact and the folder related to the current conversation.

In the **General information** area, you can view the first name, last name and ID of the web user. This information is displayed when a contact sheet has been associated with the folder during the conversation. Otherwise, ALE Connect will only display the new ID that will be assigned to the web user, once the conversation is over (a contact sheet will be automatically created). The folder number assigned by ALE Connect is also displayed.

If the web user is identified, i.e. if a contact sheet has been associated with the current conversation, the **Last events** area presents for information the last 3 events related to it (emails, previous calls, etc.). If you click one of them, the corresponding folder is opened in the History tab. Otherwise, this area is empty. The **Refresh** button () allows you to refresh the list.

The **Subject** area allows you to view/specify the reason of the conversation in progress: by default, the subject indicates “Twitter...” followed by the web user’s name as detected by the system, or from the associated contact sheet. It can be modified if necessary. The data entered in this area is automatically saved at the end of the wrap-up period and will be available in the folder classified in the Processed desktop.

The **Notepad** allows you to enter any information you think useful. It will be displayed in the notepad of the corresponding folder, once processed. The entry area can be enlarged or reduced at will, by clicking the lower right corner .

8.2.4 Context tab

It displays the browsing context of the web user. In the case of a Twitter folder, you can view **key indicators** provided by Twitter. This data, which cannot be modified, is automatically retrieved.

Find out more about the tab

8.2.5 Contact tab

It allows you to identify the **web user** who started the Twitter conversation. To facilitate your task, as soon as the folder is opened, ALE Connect will search in its database all the contacts with the **same first name and last name** as the web user (homonyms).

The web user contacts you with Twitter DM for the first time

Regardless of the search result, **you have to associate manually the contact with the folder**.

- **The search did not find any matching contacts.** You can either create manually a contact sheet, launch a manual search in the database or wait for the folder closing so that ALE Connect automatically creates the contact sheet from the information retrieved from Twitter.
- **The search found 1 contact.** ALE Connect displays the contact sheet in the tab but does not associate it with the folder.
- **The search found several contacts.** ALE Connect presents in the tab the list of the first 10 homonyms sheets. It is up to you to associate the one that corresponds to the folder.

In all cases, at the end of the wrap-up time (folder closing), if no contact has been associated with the folder, ALE Connect automatically creates the contact sheet and associates it.

The web user has already contacted you with Twitter DM

For a new interaction, and whatever the Twitter account (of the brand), **the Twitter web user will be automatically identified** and associated with the folder (unlike Facebook Messenger that does not allow this global unique identification, but only by brand page).

The web user is identified

The tab presents the information extracted from its contact sheet and particularly the **data from Twitter**:

- his/her profile picture,
- his/her last and first name on Twitter,
- his/her Twitter accounts (the web user can have several accounts),
- the number of tweets the user has posted,
- his/her number of subscribers,
- his/her number of subscriptions,

Note: if the web user updates his/her Twitter profile, his/her social identity will be automatically updated when receiving a new direct message in ALE Connect.

Find out more about the tab

8.2.6 History tab

It allows you to view the history of folders already saved for the web user. This tab is displayed only if the contact has been identified in the ALE Connect database. Otherwise, it is hidden.

Find out more about the tab

8.2.7 Knowledge base tab

It allows you to process the folder more quickly, by picking response templates to the issues submitted by the contact. Warning: the attachments eventually associated with a response template are not displayed.

Find out more about the tab

8.2.8 Script tab

It allows you to control the conversation with the web user. This tab is optional: it is only displayed if the coordinator has configured a script to process Twitter DM interactions. Otherwise, it is hidden.

Find out more about the tab

8.2.9 Qualification tab

It is possible to qualify the interaction by assigning one or several criteria to it. This tab is displayed only if these qualification criteria have been defined for the queue in which the folder is arrived. Otherwise, it is hidden.

Find out more about the tab

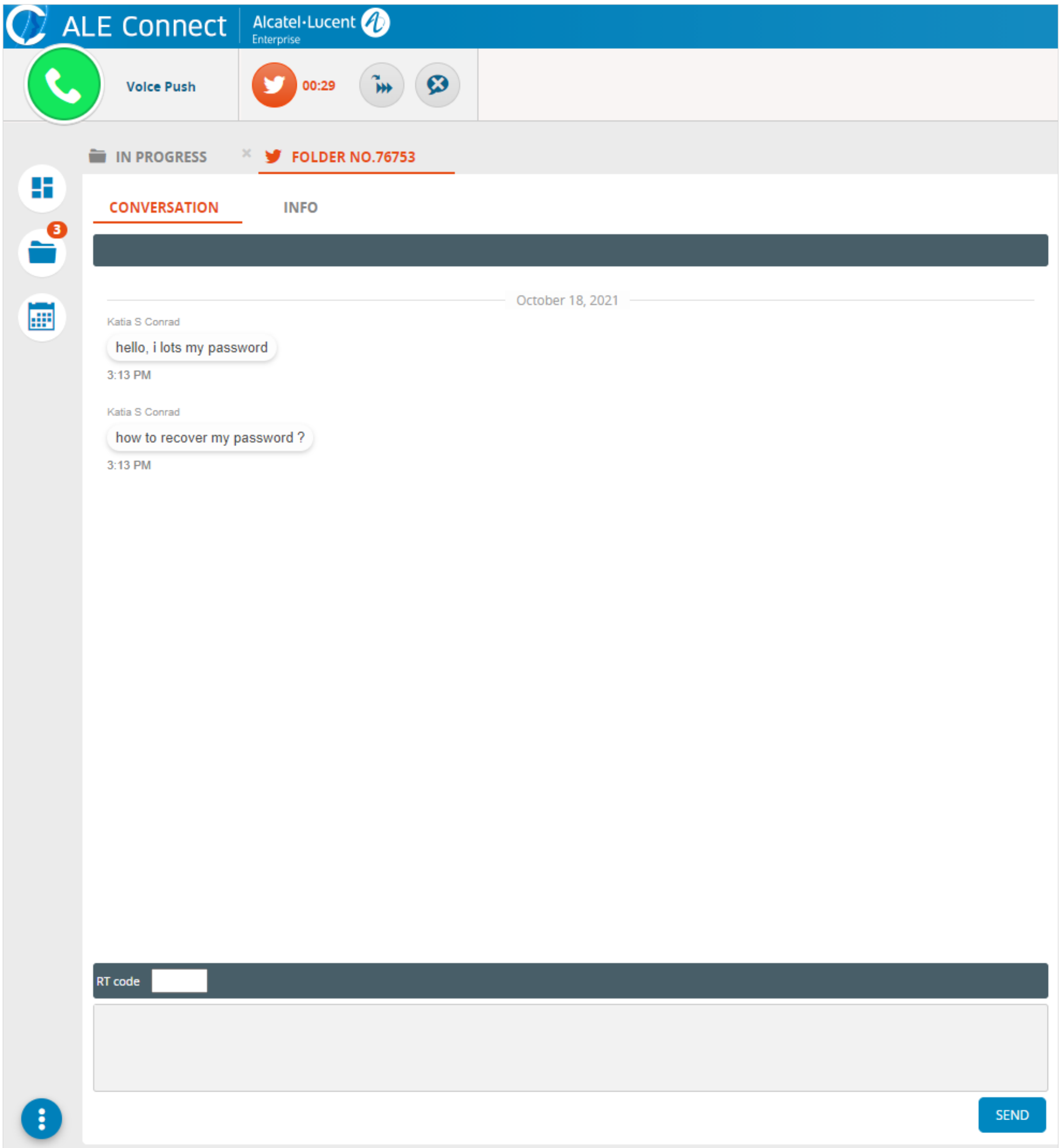
8.3 Processing a Twitter DM conversation

The processing consists in replying to the direct message(s) sent by a web user, and to exchange with him/her in order to best respond to his/her request.

Unlike chat, this exchange can be performed asynchronously: when you are processing the folder, the web user is not necessarily logged in to Twitter, or able to reply to you. However, nothing stops you from replying because your messages will be saved in the folder. The processing starts as soon as the folder is opened on your ALE Connect interface. You can process up to 9 Twitter DM folders simultaneously.

If available, you can use at the same time the conversation guide which is displayed on the **Script** tab.

1. After supporting the folder, it is opened in your ALE Connect interface.
2. Read the message(s) sent by the web user:



3. When it is your turn to write, type your message in the entry area at the bottom of the screen.

   To go faster, do not hesitate to insert a response template when the contact request allows it: from the knowledge base, by entry of its RT code, by autocompletion, or manually by copying and pasting.

4. Click **Send** or press the **Enter** key.

   The web user receives your message on his/her Twitter DM interface.

5. The web user replies to your last message.

6. Continue the conversation until the web user's request has been processed.

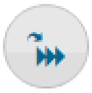
7. When you have finished, click the **End the conversation** button () from the remote control.

   You enter the wrap-up phase. You can now finalise the processing of the folder.

8.4 Using the remote control

As soon as you start the processing of a Twitter DM conversation, a remote control is displayed in the banner of the interface. It allows you to act on the conversation in progress.

A timer is displayed and the function buttons are active:

Button	Function	Display	Use
	Conversation in progress timed	Permanent	Duration of the conversation displayed in real time. The timer starts counting down as soon as you open the folder, i.e. when the corresponding tab opens in the workspace. It cannot be paused.
	Wrap-up	Only when the conversation is over	Countdown of the time remaining to finalise the folder. The duration reserved for this task is set by the platform administrator.
	Requalification	Permanent	Allows to modify the skill associated with the folder.
	End	Permanent	Ends the conversation with the web user.

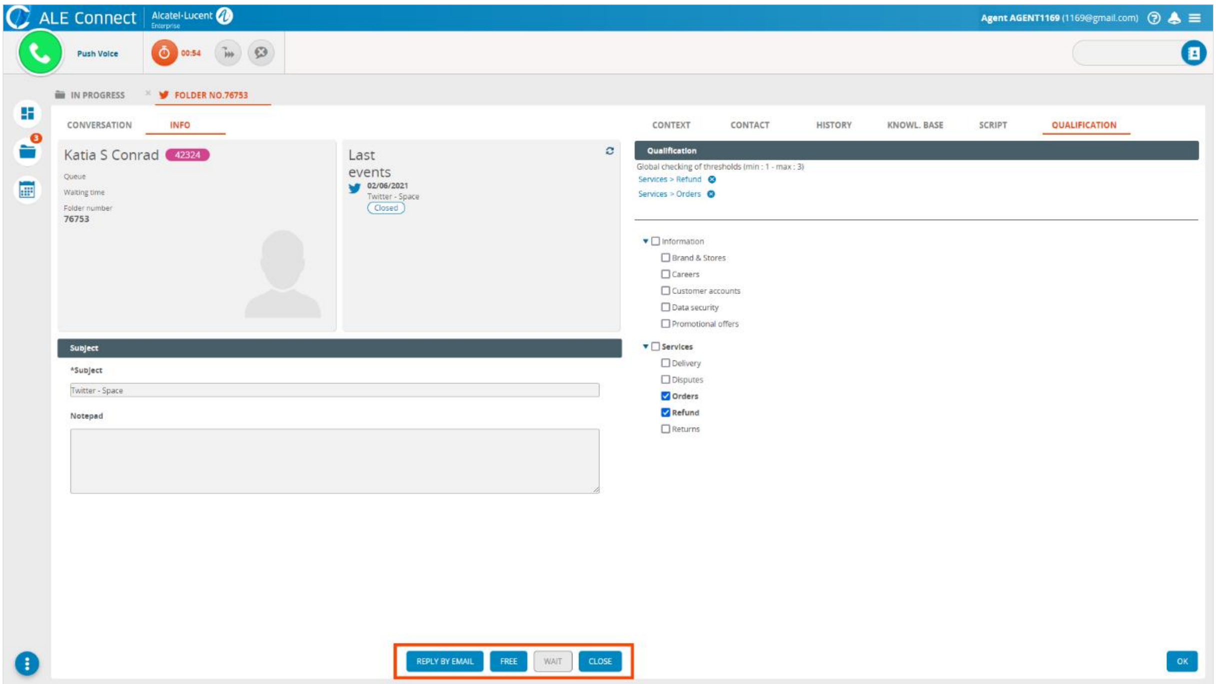
8.5 Ending a Twitter DM conversation

You simply need to click the **End** button (⊗) of the remote control in the banner. You enter the **wrap-up** phase: by default, you have 30 seconds to finalise the folder. This deadline is set up by the coordinator. It is represented by a timer in the remote control. If the web user sends new messages while you are finalising a folder, they will not be visible: the folder must be reopened after its closing to view them. At the bottom of the screen, several buttons are displayed in the Info tab: you can choose what to do with the folder. Without any action, this tab will be automatically closed at the end of the wrap-up time.

Furthermore, do not forget to qualify the folder. If this is not performed before the end of the wrap-up time, the interaction will be closed without qualification.

8.5.1 Finalising the folder

1. Click the **End the conversation button** (⊗) from the remote control.



2. Assign qualification criteria to the folder in the corresponding tab.

   According to the ALE Connect setup, the qualification may be optional. If this is not performed before the end of the wrap-up time, the interaction will be closed without qualification.

3. Click the button corresponding to the desired action:

   Reply by email: allows you to reply to the web user's request by sending him/her a spontaneous email. It will be associated by default with one of the email queues to which you have rights. The spontaneous email will be merged into the folder once the conversation is closed.

   Free: this button is active if you have not replied to the web user's request. It closes the current folder which remains with the To be processed status in the In progress desktop. This action is useful when, for example, you have opened the folder but do no longer wish to process it.

Wait: this button is displayed when you are the last to send a message. If it is the web user who answered last, the button is greyed out (you can however free the folder in this case). The folder is then temporarily put on hold, as the contact information is missing to close it. The folder changes to Waiting for contact status and is stored in the Processed desktop, as in the case of an automatic closing. As soon as the web user sends a new message, the folder changes to the Contact reply status and returns to the In progress desktop.

Close: allows you to close the folder before ALE Connect does it automatically, when you do not want to wait for the end of the wrap-up time. If the qualification of the folder is mandatory and you have not yet performed so, ALE Connect automatically displays the Qualification tab. ALE Connect then closes the conversation: the folder changes to Closed status is stored in the Processed desktop.

8.5.2 The wrap-up time is over

At the end of the wrap-up time, ALE Connect:

- automatically closes the Twitter DM conversation;
- closes the corresponding tab and hides the remote control;
- stores the folder in a desktop according to the chosen action;
- creates a contact sheet by retrieving the web user's information, only if no contact from the database has been associated with the conversation.

9 Folders

A folder contains all the correspondence between the agent and the contact i.e. all the messages and elements exchanged that were necessary to process the request. If, during the correspondence, the contact performs a new request, then a new folder can be created. Whatever its media (voice, email, etc.), each interaction with a contact necessarily generates a folder referenced by a unique number assigned by ALE Connect.

The creation of the folder can be triggered on your initiative (ex: receipt of a registered mail) or performed automatically as soon as you support an interaction (ex: response to an incoming call).

When the interaction is over, the folder is created in the system and then classified in a desktop on the same principle as mail in a mailbox.

9.1 Creating a folder

In most cases, you do not need to create the folder yourself. This is generated automatically as soon as you handle an interaction or when it arrives in the system (email to the contact centre for example). However, you may need sometimes to open manually a new folder: for example, following the receipt of a letter.

You have then 2 possibilities:

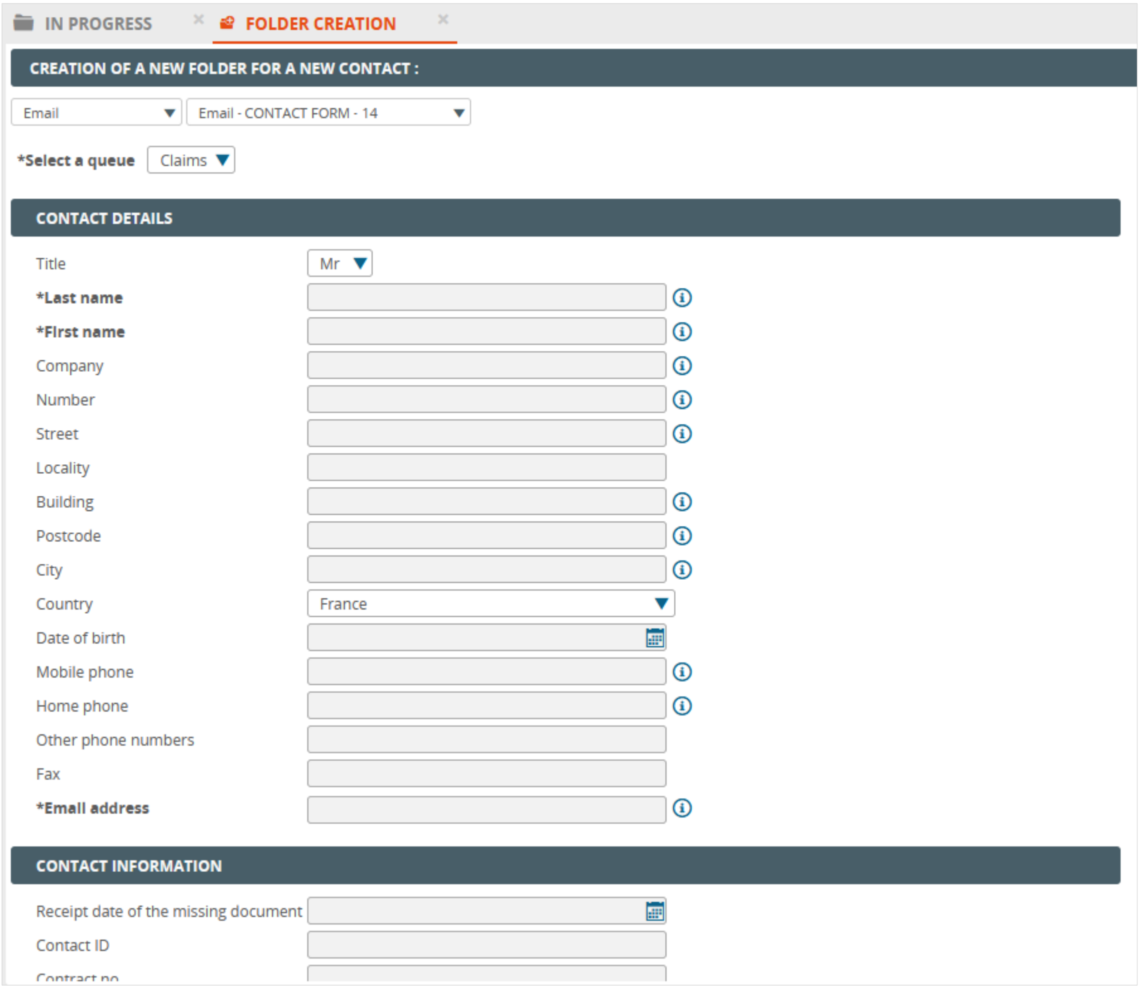
- Create a folder for a new contact
- Create a folder for an existing contact

9.1.1 For a new contact

This procedure must be followed if the contact does not exist in the database; a folder cannot be anonymous. This means creating both the folder and the corresponding contact sheet.

1. Click the **Create a folder** button () in the taskbar.

   A new tab is displayed in the workspace:



2. Fill in the folder:

   ### Type of form

   Form (mandatory)
   Select, from the drop-down list, the entry form to be used. The choice list depends on the setup performed by the coordinator. Warning: the chosen form determines the information to be filled in. ALE Connect provides one default form for each media. However, it is possible to use a customised form according to the needs of the contact centre (setup also performed by the coordinator).

   Warning: the documentation only describes the fields and entry rules of the default form provided by ALE Connect.

   Choose a queue (mandatory)
   Select, from the drop-down list, the queue to which the folder being created should be assigned. The choice list offers only the queues with the same media as the chosen type of form.

   ### Contact's details

   Identify the contact for whom the folder is created. At the end of this procedure, a new contact sheet will be automatically added to the database. These are the same fields as those in the contact sheet.

   Title
   Select, from the choice list, the title of the contact. By default, this is Mr. The choice list is predefined in the system and cannot be changed.

   Last name (mandatory)
   Enter the last name of the contact.

   First name (mandatory)
   Enter the first name(s) of the contact.

   Company
   Fill in the company name, when the contact works for a company.

   Number/Street/Locality/Building
   Enter the postal address of the contact, by filling in the necessary fields.

   Postcode/City
   Enter the postcode and the city where the contact lives. ALE Connect does not control the consistency between the code and the city entered.

   Country
   Select, from the choice list, the country where the contact lives. It is inherited by default from the system.

   Date of birth
   Enter the contact's date of birth, in DD/MM/YYYYY format, either by entering it directly or by selecting it from the calendar.

   Mobile/Home phone
   Enter the phone numbers without putting spaces between the digits (ex: 0102030405). In case of international number, enter the 00 prefix followed immediately by the relevant country code, then the digits of the number (ex: 00330102030405).

Other phone numbers
You can enter a third number if necessary. The entry rules are the same as the previous field.

Fax
If necessary, enter a fax number when the contact works for a company. The entry rules are the same as for phone numbers.

Email address (mandatory)
Enter the email address of the contact. This field is mandatory if the chosen queue is for email media.

Contact information

It allows you to provide details about the contact, which will help in the processing of his/her file. All these fields are optional.

Receipt date of the missing document
Enter the receipt date of the missing document, either by entering it manually, or by selecting it from the calendar.

Contact ID
If necessary, enter an ID for the contact (255 alphanumeric characters maximum).

Contract no.
Enter the contract number associated with the contact, if the contact has one (150 alphanumeric characters maximum).

Subscriber reference
Enter the contact's subscriber number, if the contact has one (150 alphanumeric characters maximum).

Order no.
Enter the order number associated with this folder (150 alphanumeric characters maximum).

Comment
This field allows you to enter a free comment, if necessary (4000 alphanumeric characters maximum). The entry area can be enlarged or reduced at will, by clicking the lower right corner represented by the .:: icon.

Subject

You must indicate the subject of the request (255 alphanumeric characters maximum) i.e. the reason why the folder is being created.

Question

You must describe the question asked by the contact, i.e. the request that is performed through this folder (4000 alphanumeric characters maximum). You can detail the need or the problem encountered. When writing, editing options are available to help you.

Request attachments

Attach a file
To support the folder, you can attach one or several files (all formats accepted). They can be provided by the contact him/herself (order form, content of an email, etc.). Click the **Attach a file** link. Select the file to attach to the folder, on your computer. Then, click **Open** (or **Cancel** if you finally wish to abandon this action). Repeat these steps as many times as there are documents to be attached.

Qualification
You can qualify the folder, i.e. categorise it according to certain criteria.

Notepad

The Verbatim fields allows you to enter a second comment related to the folder being created, if necessary. This information will be visible in the notepad associated with the folder, once created. The entry area can be enlarged or reduced at will, by clicking the lower right corner represented by the .:: icon.

Reply

Describe the reply to the contact's request (optional). When writing, editing options are available to help you. It is possible to insert a response template in the body of the message, or to perform a response proposal via the artificial intelligence engine. It is possible to provide a response later, depending on the progress of the folder.

Reply attachments

In order to support the response, you may attach one or more documents: supporting documents, procedures, documentation, etc. Click the **Attach a file** link. Select the file to attach to the folder, on your computer. Then, click **Open** (or **Cancel** if you finally wish to abandon this action). Repeat these steps as many times as there are documents to be attached.

3. Choose the action to perform from the drop-down list:

   Close: the folder changes to Closed status and is stored in the Processed desktop, without a response to the contact.

   Reply and close: the folder changes to Closed status and is classified in the Processed desktop. The answer provided by the agent is sent to the contact by email.

   Reply without closing: the folder changes to To be processed (bis) status and remains in the In progress desktop.

   Reply and wait: the folder changes to Waiting for contact status and is moved to the Processed desktop.

   To be processed by another agent: the folder changes to To be processed status and is classified in the In progress desktop with assignation to an agent.

   To be processed: the folder is assigned to you, changes to To be processed status and is classified in the In progress desktop.

Warning: the list of available actions depends on the setup performed by the coordinator.

4. Click **Send**.

   ALE Connect creates the folder and the contact sheet. The software displays a message informing you of the success of the action. The folder is moved to the In Progress or Processed desktop, depending on the selected action.

9.1.2 For an existing contact

It consists in creating a folder for a contact that exists in the database. The entry of the folder is the same as the one described above. The only difference is that here the contact's details are already filled in from his/her sheet.

1. Perform a contact search.
2. In the list of results, click the contact for whom you wish to create a folder.
3. Click the **CREATE FOLDER** button.
4. Fill in the folder form.
5. Choose the action to perform.
6. Click **Send**.

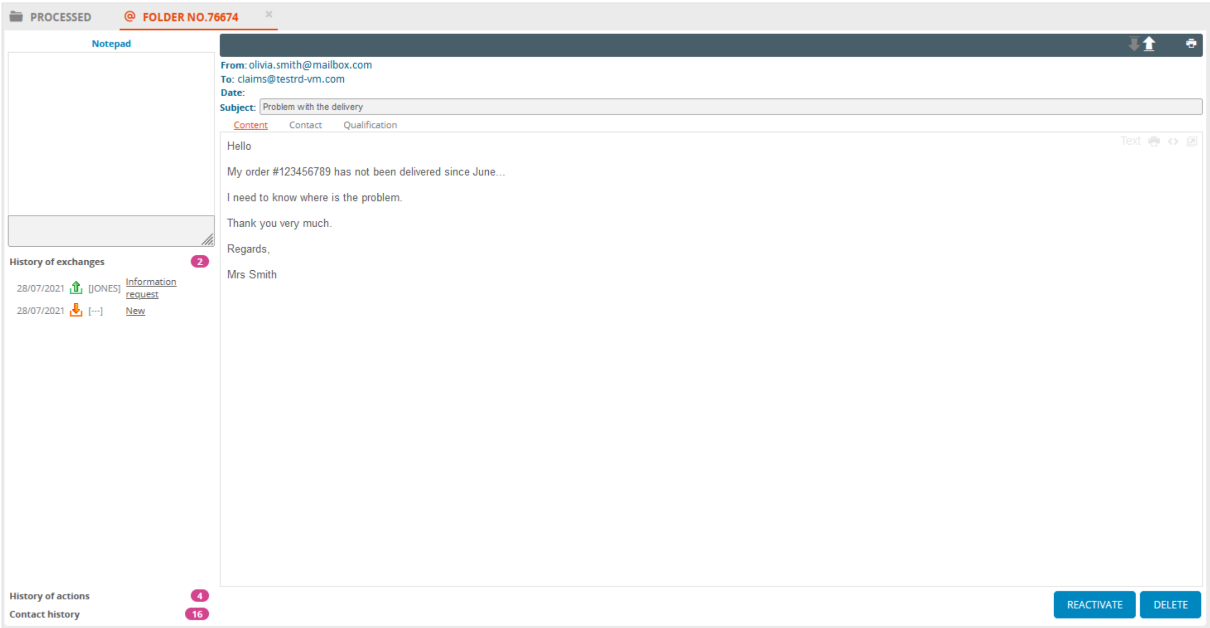
   ALE Connect creates immediately the folder.

9.2 Viewing a folder

Any interaction with a contact, whatever its media, necessarily generates a new folder identified by a unique number. This folder is actually created at the end of the interaction, then stored in a desktop according to the action performed (close, etc.).

1. Click the **List of folders** button ().
2. Select the desktop where the folder to be viewed is stored.
3. If necessary, perform a folder search.
4. Open the affected folder by clicking the corresponding line.

   Its content is displayed on the screen:



   A notepad is located in the upper left corner of the window. Some widgets are located in the lower left corner. The content of the folder is mostly on the right side and has various tabs.

5. Click the desired tab to access the detailed content of the folder.

   Content displays the content of the folder in text or HTML format.

   Contact displays the contact information related to the folder.

   Data displays information about the folder.

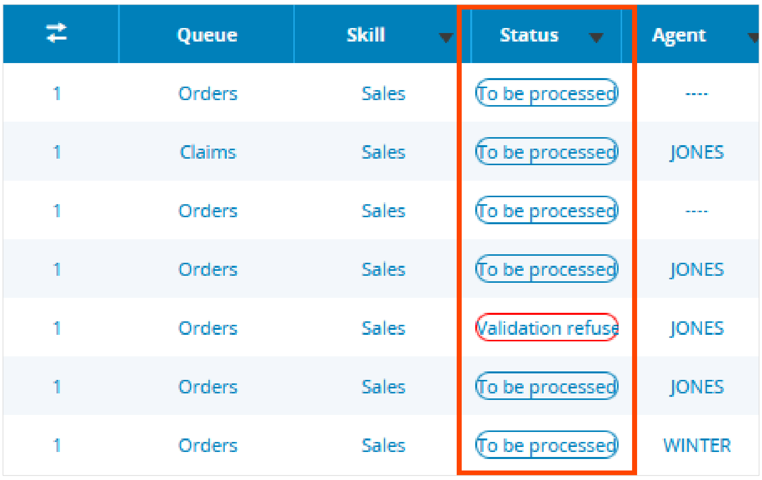
   Qualification displays the qualification criteria of the folder defined by the agent, which can be modified by the agent him/herself or by the supervisor.

   The email folders can be reactivated if necessary.

6. Close the folder when you have finished.

9.3 Folder statuses

The status of a folder allows you to see how far it has progressed. Indeed, during its life cycle, a folder will go through different statuses between the moment it is created and the moment it is closed. The status is displayed in the column of the same name, when you view a list of folders (whatever the chosen desktop). This section thus summarises all the possible statuses of a folder, detailed by desktop.



9.3.1 In progress desktop

Status	Description
To be processed	Initial status of a folder at its arrival in the queue. It is considered that no processing has been performed on this folder yet. This status will change after an agent supports the folder.
To be processed (bis)	A non-definitive response was sent to the contact. It allows, for example, to make him/her wait and does not necessarily expect any return. The folder takes this status when the agent has clicked the Reply without closing button during the processing.
Expert waiting	The folder has been sent to one or several experts in order to respond to the contact's request. It is therefore awaiting a response from the expert(s) requested (the number is specified in brackets). Ex: Expert waiting (0/1).
In progress	The folder is currently being opened by an agent.
Grouped	The folder is currently grouped with others in order to perform a combined action (archive, assign to an agent, etc.).
Reminder	A folder takes this status when: - a new message from the contact has arrived while a previous message has not yet been processed. - the contact replied to a message while the folder was in the To be processed (bis) status.
Contact reply	The contact has responded to the last message sent by an agent on his/her folder. The return message is automatically assigned to this agent.

Status	Description
Expert reply	One or several experts requested on the folder replied (number in brackets). Ex: if only one of the two experts requested has responded to the folder, ALE Connect displays Expert reply (1/2).
Validation refused	The folder was sent to a supervisor for validation, but the supervisor refused to validate the response to the contact. Therefore, the folder is returned to the desktop with this status.

9.3.2 Processed desktop

Status	Description
Archived	The folder has been archived manually by an agent, or automatically by the ALE Connect routing engine.
Contact waiting	The agent has replied to the contact but is waiting for feedback (ex: request for further information, for example). The folder is considered as processed but awaiting the response from the contact. This status is assigned when the agent has clicked the Reply and wait button while processing the folder.
Closed	This status is assigned to the folder when the contact's request is considered as satisfied. It is therefore assigned to the folder when: - the agent has clicked the Reply and Close button, Send and Close or Close at the end of the folder processing. - the agent has sent a spontaneous email and has clicked the Send and Close button. - the agent has manually closed the folder. - the folder has been automatically closed at the end of the wrap-up time.
Outbound closed	This status is assigned to any outbound call folder that has been successfully completed.
Closed (forward)	The folder has been permanently forwarded to one or several recipients to be processed outside ALE Connect. This action can be performed manually by an agent (having transfer rights) or automatically by a routing rule.
In progress	The folder is currently being opened by an agent.
Grouped	The folder is currently grouped with others in order to perform a combined action (archive, assign to an agent, etc.).
Not closed (requalification)	The agent tried to requalify the folder to another realtime queue but a problem (technical or other) has occurred during the operation. The folder has therefore not been closed correctly.
Not closed (outbound call requalification)	The agent tried to requalify an outbound call to a queue but a problem (technical or other) has occurred during the operation. The folder has therefore not been closed correctly.

Status	Description
Not closed (incoming call transfer)	The agent tried to transfer an incoming call but a problem (technical or other) has occurred during the operation. The folder has therefore not been closed correctly.
Not closed (outbound call requalification)	The agent tried to transfer an outbound call but a problem (technical or other) has occurred during the operation. The folder has therefore not been closed correctly.
Not completed	A problem occurred while the folder was being processed (ex: network failure, agent suddenly logged out, etc.). The folder has not been closed correctly.
Automatic reply	A response to the folder was generated and automatically sent to the contact via an action of the routing engine.
AI automatic reply	A response to the folder was generated and automatically sent to the contact via the artificial intelligence engine.

9.4 Filtering the list of folders

To facilitate your daily work, you have the possibility to restrict the display of the list of folders by applying one or several filters according to:

- queues
- skills
- languages
- a column

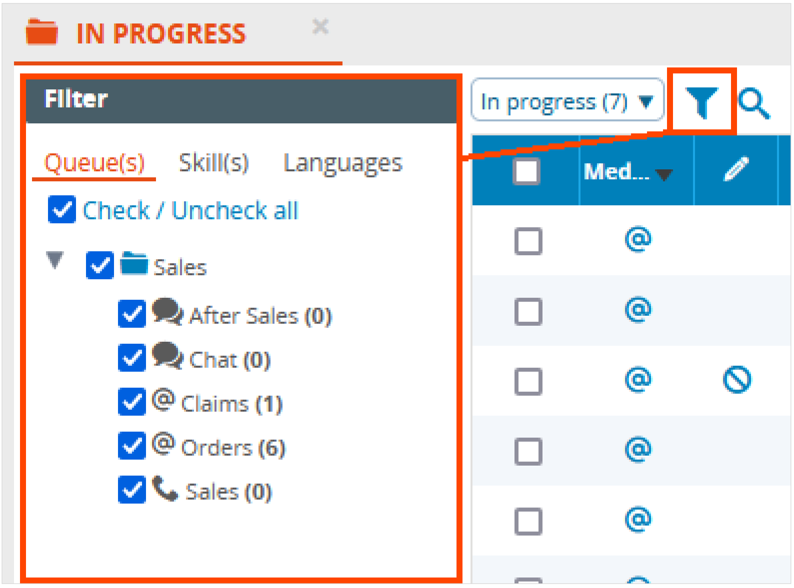
ALE Connect then displays only the list of folders that match the applied filters, whatever the desktop.

Warning: the filters can be cumulated.

9.4.1 According to queues

A queue is a set of folders belonging to the same media, sorted in chronological order of arrival, one after the other. This filter can be useful when you follow up certain queues. ALE Connect will then display only those folders for which you have rights to the relevant queue, regardless of the priority of the folder.

1. Click the **List of folders** button (🖿).
2. Select a desktop: the list of corresponding folders is displayed.
3. Click the **Filter** icon (⏷) located in the action bar above the list. A vertical pane is displayed on the left of the screen:



4. Click the **Queue(s)** tab.

   You can view the queues on which you have read/write rights. If the name of the queue is crossed out, this means that you only have read rights (the queue is set up with the Folders not visible option unchecked).

5. Check now the **queues** for which you wish to display the affected folders, all desktops included.

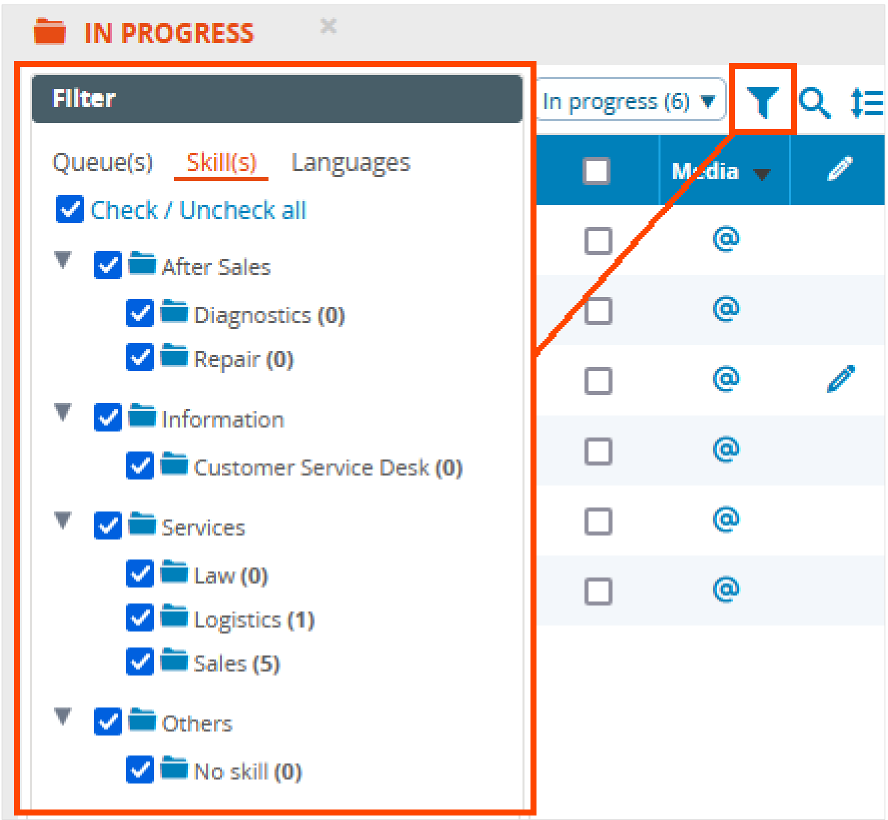
   The number of available folders is specified between parenthesis. It is possible to check or uncheck all to view all folders or, on the contrary, to hide all. The list is immediately updated and restricted to the folders belonging to the selected queues.

9.4.2 According to skills

A skill is a know-how and a set of knowledge allowing to perform various tasks. This criterion is essential to distribute the folders to be processed to the most appropriate agents (for example, a technical skill to process the after-sales service folders). The principle is the same as for the queues: it is possible to filter the list of folders related to one or more skills.

Warning: folders with priority 1 and 2 are always visible regardless of the skills checked (none, one, several or all) even if you have no right on the skill of these folders.

1. Click the **List of folders** button (🖿).
2. Select a desktop: the list of corresponding folders is displayed.
3. Click the **Filter** icon () located in the action bar above the list. A vertical pane is displayed on the left of the screen:



4. Click the **Skill(s)** tab.

   You can view the skills for which you have rights.

5. Check now the **skills** for which you wish to display the affected folders, all desktops included.

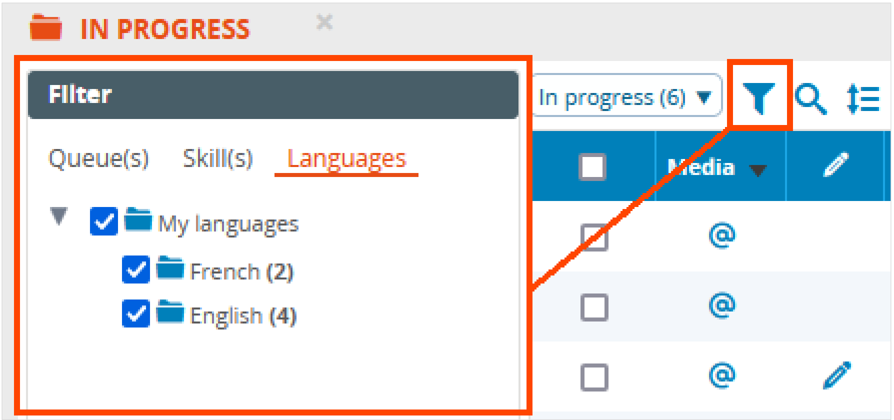
   The number of available folders is specified between parenthesis. It is possible to check or uncheck all to view all folders or, on the contrary, to hide all. The list is immediately updated and restricted to the folders that require the selected skills.

9.4.3 According to languages

This criterion is particularly useful when the contact centre is multilingual and manages interactions from several countries. The principle is the same as for the queues and skills: it is possible to filter the list of folders related to one or more languages.

Warning: folders with priority 2 are always visible regardless of the languages checked (none, one, several or all) even if you have no right on the language affected.

1. Click the **List of folders** button ( ).
2. Select a desktop: the list of corresponding folders is displayed.
3. Click the **Filter** icon ( ) located in the action bar above the list. A vertical pane is displayed on the left of the screen:



4. Click the **Language(s)** tab.

   You can view the languages for which you have rights.

5. Check now the **languages** for which you wish to display the affected folders, all desktops included.

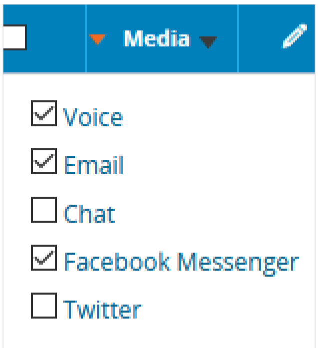
   The number of available folders is specified between parenthesis. It is possible to check or uncheck all to view all folders or, on the contrary, to hide all. The list is immediately updated and restricted to the folders that use the selected languages.

9.4.4 According to a column

In the header of some columns from a list of folders, an ▼ icon is sometimes displayed to the right of its name: it means that you can filter the folders according to this criterion. It is possible to filter several columns: in that case, the filters can be cumulated.

1. Click the **List of folders** button (📁).
2. Select a desktop: the list of corresponding folders is displayed.
3. Click the ▼ icon located in the column to filter.
4. Check (or uncheck) the desired values.

   In the example below, the list has been filtered by media and only displays the Voice, Email and Facebook Messenger folders.

   The list of folders is immediately filtered and updated.

   Any filter applied to a column is indicated by a bold white line under the name of the column.

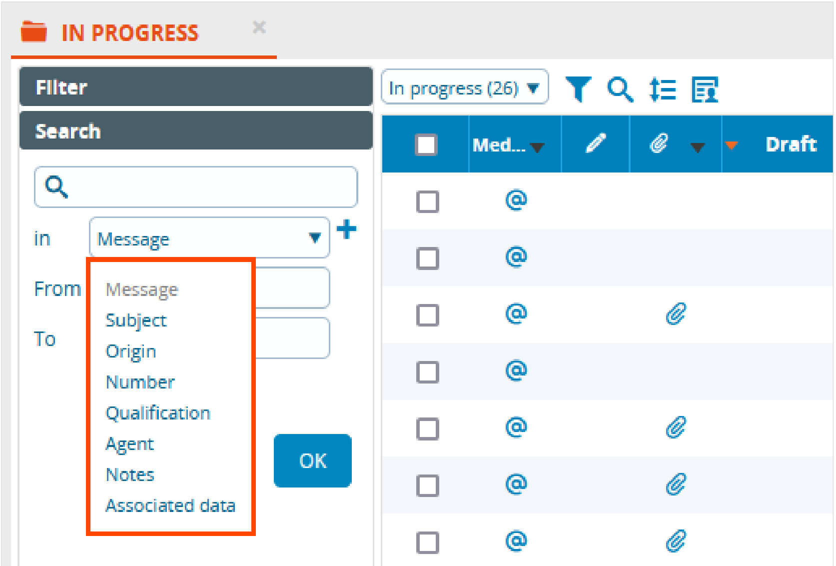
9.5 Searching folders

ALE Connect allows you to search folders in any desktop of your choice, according to precise criteria (period, agent, etc.).

9.5.1 Rules to follow

- The search is not **case-sensitive**.
- The entry area must at least contain **3 characters**.
- The **accented characters** are not taken into account.
- The **punctuation characters** ".", ",", ";" or "space" are considered as separators. Ex: if you type “Hel.lo” for the Message criterion, ALE Connect returns the folders for which the message contains the “Hel”, OR “lo” OR “Hello” string.
  Special case: the dot cannot be used as a separator with the Origin criterion, no matter the media of the folder.
- For some criteria, different search combinations are available by using the **wildcard** character *:
  lorem: ALE Connect searches strictly this string.
  lorem*: ALE Connect searches all words beginning with lorem.
  *lorem: ALE Connect searches all words ending with lorem.
  lorem: ALE Connect searches all words containing lorem.
  Lorem ipsum: ALE Connect searches any of these strings.
  *: ALE Connect searches all the folders.

9.5.2 Search criteria



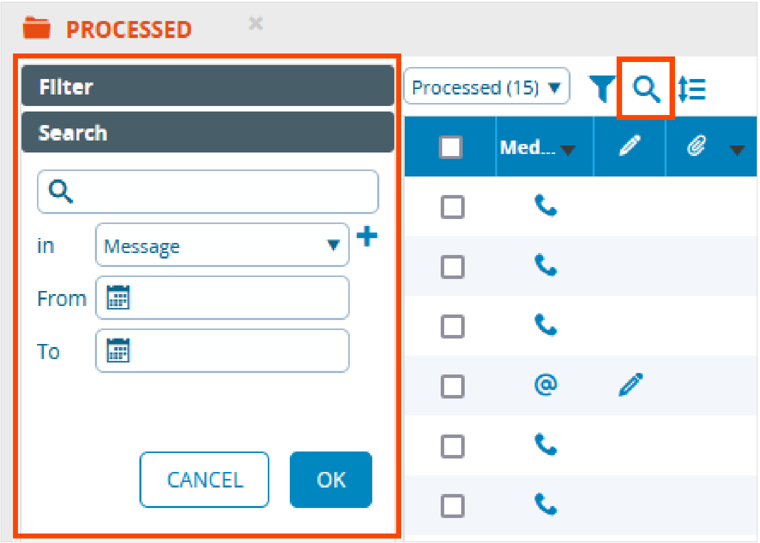
- **Message**
  - Searches the entered character string in the body of emails.
  - Not case-sensitive (upper/lower cases).
  - Does not take into account accented characters.
  - The punctuation characters ".", ",", ";" or "space" are considered as separators.
  - The wildcard character * is allowed.
  - Double quotes " allow to search strictly the entered character string.
- **Subject**
  - Searches the entered character string in the subject of emails.
  - Same entry rules as the Message criterion.
- **Origin**
  - Searches strictly the entered character string among the senders of the emails.
  - Same entry rules as the Message criterion.
  - Exception: the dot is not considered as a separator so that the search is not extended (often present in email addresses).
- **Number**
  - Searches strictly the entered character string among the folder numbers.
  - Allows to search a single folder (not a selection).
  - Accepts digits only.
  - The wildcard character * is not allowed.

- **Qualification**
    - Searches strictly the entered character string among the qualification criteria of the folders.
    - Double quotes “ are mandatory before and after the searched string.
    - Not case-sensitive.
    - Takes into account accented characters.
    - The wildcard character * can be used at the beginning or end of an entry.
- **Agent**
    - Searches strictly the entered character string among all agents associated with the folder.
    - The search is performed in two steps: it identifies the agent(s) corresponding to the entered text, and then finds the folders associated with this/these agent(s).
    - If several agents are found, the folders associated with these agents are listed as results.
    - The search is performed on the last name OR the first name OR the login. An agent is identified if at least one match is found for one of these fields.
    - Takes into account accented characters. Example: the “Céline” and “Celine” values are not equivalent and will return different folders.
    - An exact match search is performed. For example, "D'haulte-Feuille" and "D'haulte" are not equivalent.
    - The wildcard character * can be used at the beginning or end of an entry.
- **Notes**
    - Searches the entered character string in the notes of the folders.
    - Same entry rules as the Message criterion.
- **Associated data**
    - Searches the entered character string in the additional data associated with folders (visible in the Data tab of a folder).
    - Same entry rules as the Message criterion.
    - If the search field is of the date type, the date must be entered in the format "YYYY/MM/DD" surrounded by double quotes, regardless of language or region.

9.5.3 Procedure

1. Click the **List of folders** button ( ).
2. Select the desktop for which you wish to perform a search.
3. Click the **Search** button ( ) in the action bar.

   A vertical pane is displayed on the left of your workspace:



4. Select a search criterion **in** the choice list.
5. In the field, type the **character string** to search, respecting the entry rules.
6. To add a **second criterion**, click the ✚ button.

   Two new fields are displayed: repeat steps 4 and 5. In that case, the criteria are combined: ALE Connect will search the folders that strictly match the two defined criteria. You can add up to 3 criteria.

7. If necessary, specify a **search period**.

   Both dates are optional. If you do not specify a period, ALE Connect will search all existing history.

   The date taken into account for the search is the date of the last indexing. Indeed, ALE Connect indexes the changes performed to a document (ex: entry of an email in the system or response from an agent).

   However, it does not index the changes performed to a folder which do not generate an incoming or outgoing flow, such as archiving for example (in that case, there is no outgoing flow).

   Let's assume an email is arrived on June 1st and has been archived by an agent on June 3rd. To find it via the search engine, you should type June 1st.

   Our advice: to view all the folders processed by an agent on a specific date, we recommend that you perform a broader search than the targeted date, and then use the page browsing to view the folders.

8. Click **OK** or press the **Enter** key.

   ALE Connect immediately launches the search and displays a list of corresponding folders. Otherwise, if no folder has been found, the list is empty. If one of the entry rules has not been followed, an error message is displayed and informs you.

9.5.4 Results obtained

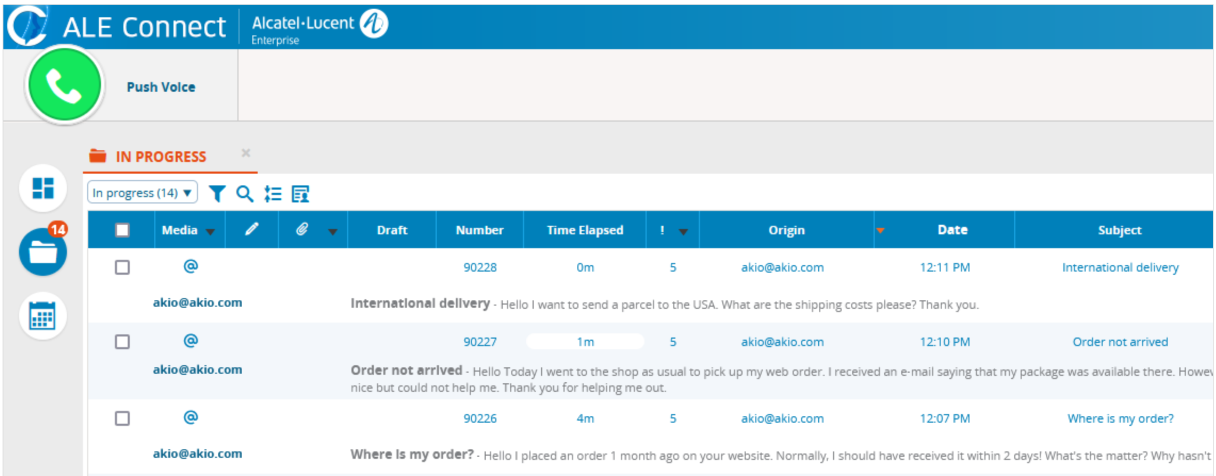
- **The maximum number of results is limited to 999.** If the number of folders found exceeds this limit, no result is displayed. ALE Connect informs you of the failure and invites you to refine your search.
- **By default, the Processed and Recycle Bin desktops display folders for the last current month**, calculated from the current date. For example: if the current date is 11/07 at 10:30, then ALE Connect will display folders from 11/06 10:30 to 11/07 10:30 (regardless of whether the month is 28, 29, 30 or 31 days long). If you run a search for one of these desktops, this display condition is removed. The search may therefore find more or fewer folders than at the start.

9.6 Previewing the content of folders

At any time, you can get a quick overview of all the folders from a desktop with a single click. This is displayed for all Email, Facebook Messenger and Twitter media folders, regardless of the desktop. ALE Connect shows both the last message sent by the contact (only the first 5 lines) and the last note saved under it. This allows you to quickly find out what each folder is about, without having to open them one by one, especially for mass processing.

1. Select a desktop.
2. Click the **Show details** button ( ) in the action bar.

   The following screen is displayed:



3. Click the **Hide details** ( ) to return to the initial display.

9.7 Choosing how the list of folders is displayed

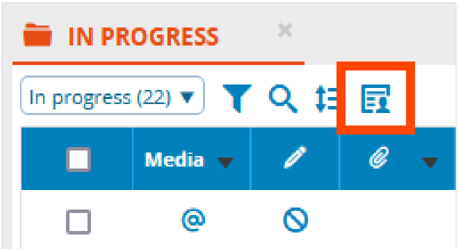
In the In Progress desktop, you may not want to see the folders of all the contact centre staff, but only your own, i.e. those assigned to you. This is the reason why it is possible to choose the list of folders you prefer to display, if this option has been authorised by the platform coordinator. Note that the filters on queues, skills and/or languages apply regardless of the display chosen.

9.7.1 Displaying the custom list

1. Click the **List of folders** button ().

   The **In Progress** desktop is displayed.

2. Click the **Display custom list** icon () located above the list of folders.



The list of folders is immediately updated.

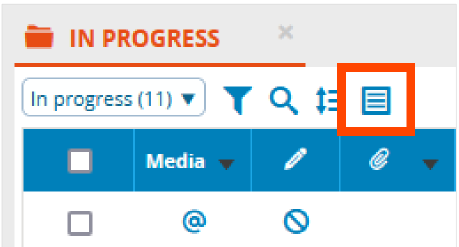
9.7.2 Displaying the standard list

The standard list displays all the folders in the In Progress desktop.

1. Click the **List of folders** button ().

   The **In Progress** desktop is displayed.

2. Click the **Display standard list** icon () located above the list of folders.

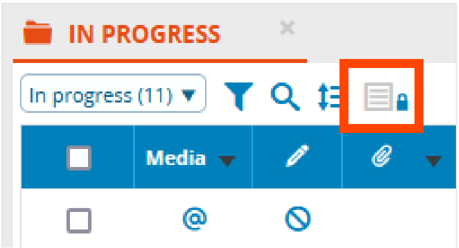


The list of folders is immediately updated.

9.7.3 I cannot choose the list...

You will notice that the icon is greyed out and that you cannot choose the type of list to display in the In Progress desktop. This means that the ALE Connect coordinator has chosen a default view (standard or custom list) and locked it. You cannot therefore choose the view you want.

1. Click the **List of folders** button ( ).
2. The **In Progress** desktop is displayed. The icon for changing the list is **greyed out**. In the example below, the **custom list** is displayed by default and locked. You cannot access the standard list.



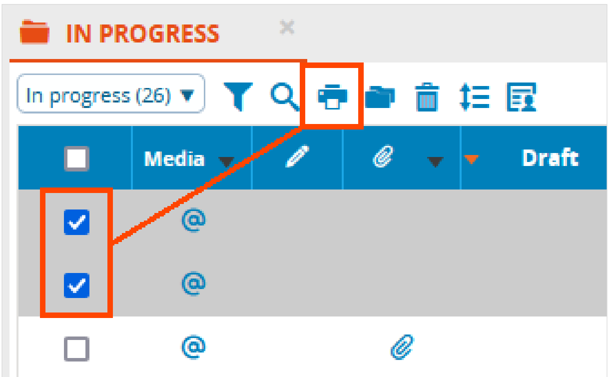
9.8 Printing folders

Printing consists in generating a .pdf file of the desired folder(s). The system extracts the basic information for each of them (date and time, subject, affected media, and content of messages) and exports it in plain text format. Emojis used in chat conversations are not printed.

This functionality is available whatever the displayed desktop.

Warning: a software to view .pdf folders must be installed on your computer, in order to read and print the generated document.

1. Click the **List of folders** button ( ).
2. Select a desktop: the corresponding folders are displayed.
3. Perform a folder search if necessary.
4. Check the **folder(s)** to print.
5. Click the **Print** button ( ) located above the list:



ALE Connect generates immediately the .pdf export file and displays it with the dedicated application on your computer. You simply need to start printing.

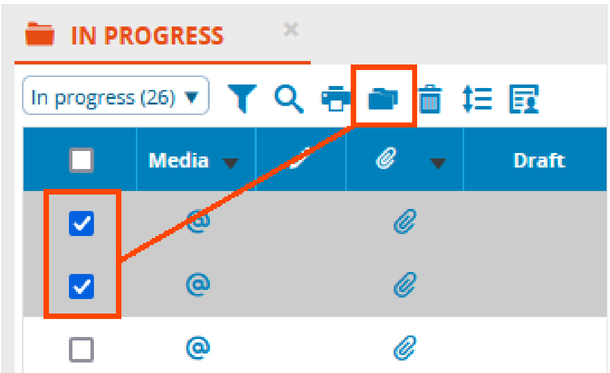
9.9 Grouping folders for simultaneous action

To optimise your work, you can perform a simultaneous action on a set of folders in progress. The benefit of this grouping is that it allows you to reply to a selection of folders, instead of processing them one by one. ALE Connect then initiates the requested action.

You can group folders of a same media or from different media, as you wish. However, there is a constraint: for the Facebook Messenger and Twitter folders, the only two actions allowed are archiving and redirection to a skill. In other words, if your selection includes at least one folder from one of these media, you will only be able to archive the grouped folders or redirect them to another skill.

Warning: when the grouped folders belong to different queues, only actions with an asterisk (*) are available.

1. Click the **List of folders** button ( ).
2. Perform a folder search if necessary.
3. Check the folders for which you wish to perform the same simultaneous action.
4. Click the **Group** button ( ) as followed:



A new field **Choice of grouped action** is displayed above the table.

5. Select the **action** to perform on the grouped folders:

Archive (*)

Redirect to a skill (*)

Merge(*)

Redirect to a queue (*)

Reserve

Free

Process

To be processed by another agent

To expert

9.10 Moving folders to the recycle bin

This action only affects email folders, particularly to delete SPAM or NPAI (mailer daemon). As an agent, you are not allowed to delete permanently a folder: you can only move it to the recycle bin (desktop not visible by the agents). Only supervisors are allowed to delete folders.

9.10.1 Single folder

This action allows you to move a folder to the recycle bin by checking its contents at the same time (to avoid any unfortunate deletion).

1. Click the **List of folders** button () in the taskbar.
2. Select the desktop where the folder to delete is.
3. If necessary, perform a folder search.
4. Click the folder to delete: its detailed content is displayed on the screen.
5. From the **Folder** tab, click **Move to the Recycle Bin**.

   ALE Connect moves immediately the folder to the recycle bin without asking for confirmation.

9.10.2 Selection of folders

This action allows you to move several folders to the recycle bin at the same time.

1. Click the **List of folders** button () in the taskbar.
2. Select a desktop: the list of folders is displayed.
3. Perform a folder search if necessary.
4. Check the folders to delete.
5. Click the **Move to the Recycle Bin** button () above the list.

   ALE Connect moves immediately the folder to the recycle bin: the folder is no longer accessible.

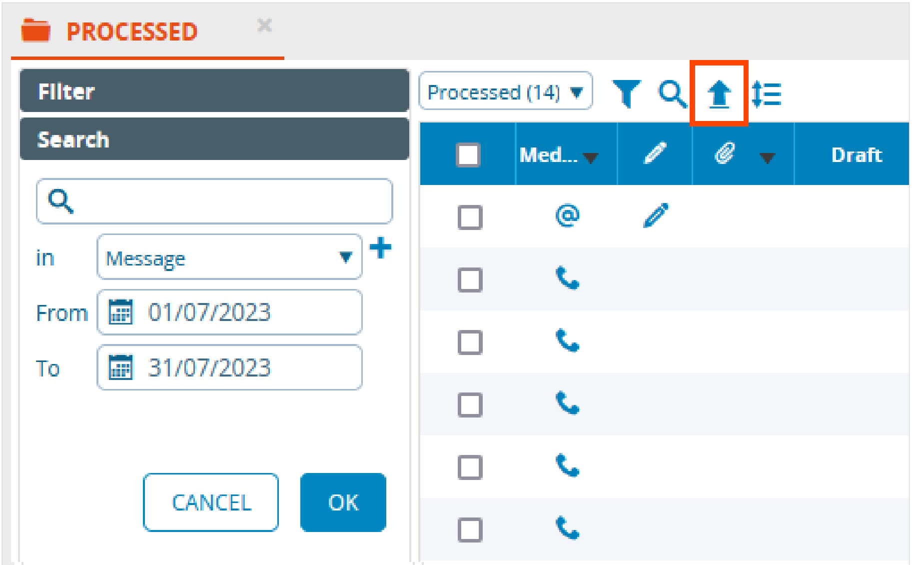
9.11 Exporting email addresses

You can export all the contact email addresses of a list of folders obtained from a search, into a single file named export.csv. The export generates one line by folder, even if the folder does not contain an email address (voice folder for example): in that case, the line is empty.

This functionality is useful when you wish to send an emailing later, or to enrich the customer database for marketing purposes. It is available whatever the desktop used.

1. Click the **List of folders** button ().
2. Select a desktop: the list of corresponding folders is displayed.
3. Perform a mandatory folder search.

Warning: the export button only appears under this condition.



4. Click the **Export** button () above the list.

   A window prompts to open the folder with a spreadsheet (Microsoft Excel™ for example) or to save it on your computer.
5. Check the desired option, then click **OK**: ALE Connect generates the export file.

   You can now retrieve it and use the data it contains.

9.12 Merging folders

When several folders affect the same subject, you can merge them into a single folder. Merging consists in **keeping a single parent folder (of your choice) by integrating the exchanges of the child folder(s)** which will be reintegrated into the history of the parent folder. These child folders will no longer be displayed in the interface.

Example 1: a contact wrote several emails, following a delayed delivery, processed by different agents.

Example 2: a contact sent a letter and a few days later his wife called the contact centre to find out the processing status of their request. Two folders were created when they actually affected the same request.

Warning: it is not possible to go back and cancel a merge.

9.12.1 What can you merge?

The table below shows **all the possible combinations** for a merge, **depending on the media** of each folder. For example, if you have selected an email parent folder, you can merge it with a voice folder, but not with a Twitter folder. Another example: a Messenger parent folder cannot be merged with anything.

	... can be merged with a folder				
A master folder...	Voice	Email	Chat	Messenger	Twitter
Voice	No	No	No	No	No
Email	✓	✓	✓	No	No
Chat	No	No	No	No	No
Messenger	No	No	No	No	No
Twitter	No	No	No	No	No

9.12.2 Consequences of the merge

Following the merge, the exchanges of the child folder(s) are attached to the parent folder. However, the child folders are deleted. Within the parent folder, ALE Connect has retained the subject of the parent folder but has retrieved the body of the most recent folder.

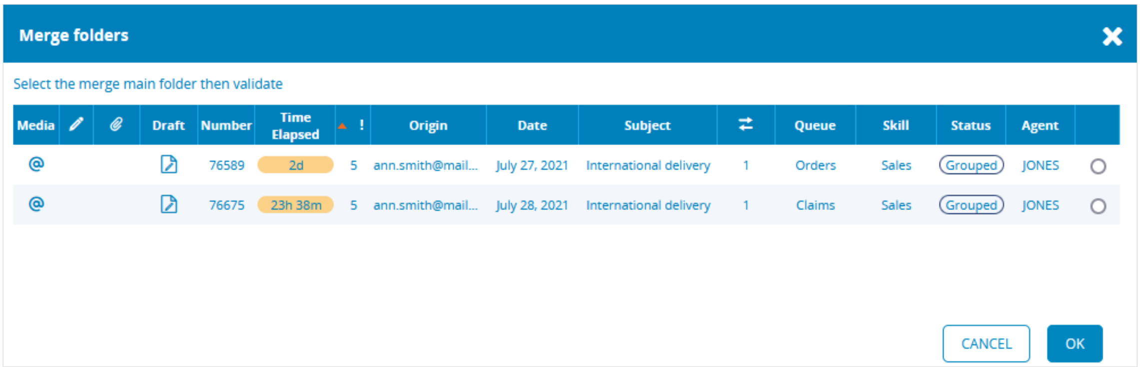
The merge is reminded in the notepad of the parent folder: a **specific note** reminds the merged folder numbers, the date and time of the merge, as well as the user's name (in brackets) who performed the action.

9.12.3 Merge via a grouped action

This action allows you to merge several folders grouped from the In progress desktop into a single folder. It can be performed even if you are processing an interaction (call, chat, etc.).

1. Click the **List of folders** button ().
2. If necessary, perform a folder search to find the ones you are interested in.
3. Check the boxes corresponding to the folders to merge.
4. Click the **Group** button ().
5. Select the **Merge** action in the scrolling list that appeared above the list of folders.

   The following window is displayed:



6. Check the **parent folder** corresponding to the folder to keep. The other folders will not be accessible after the merge.
7. Click the **OK** button.

   ALE Connect performs the merge immediately: only the parent folder remains accessible. However, the child folders are no longer accessible.

9.12.4 Merge from the history of exchanges

When you view the history of exchanges of a folder (parent), it is also possible to perform a merge.

1. Click the **List of folders** button ().
2. Select the desktop where the parent folder is stored.
3. If necessary, perform a folder search to find it.
4. Open the **parent folder** for which you want to view the history of exchanges.
5. From the History of exchanges widget, click one of the exchanges.
6. From the list on the left of the window, check the **child folders** to merge (the current folder is considered as the parent folder).
7. Click the **Validate the merge** button.

9.13 During the processing

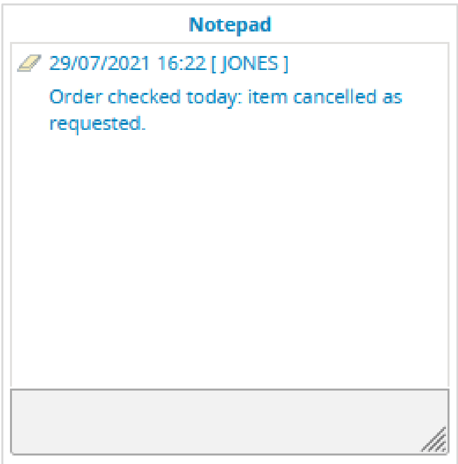
9.13.1 Notepad

This accessory allows you to take notes regarding a folder, to inform anyone who may view it later. They can be added at any time, even if the folder has already been processed. Some notes are automatically generated, due to actions performed during the processing of the folder. This is the case, for example, when a supervisor refuses to validate an agent response. These particular notes cannot be deleted.

9.13.1.1 Adding a note

Remember that this action can be performed while you are processing the folder or at any other time. Adding a note is traced: ALE Connect displays the date and time of the addition, as well as the last name of the user who created it in brackets.

1. Click the **List of folders** button (■) in the taskbar.
2. Select the desktop in which the affected folder is stored.
3. If you do not know, perform a folder search.
4. Click the folder to be noted: its content is displayed on the screen.
5. The notepad is located in the upper left corner of the folder:



6. Enter the text in the grey entry area at the bottom of the notepad.
7. Press the **<Enter> key**.

   ALE Connect adds the note in the first position of the list.

9.13.1.2 Deleting a note

You can only delete notes of which you are the author. In other words, you cannot delete notes entered by other agents or automatically generated notes.

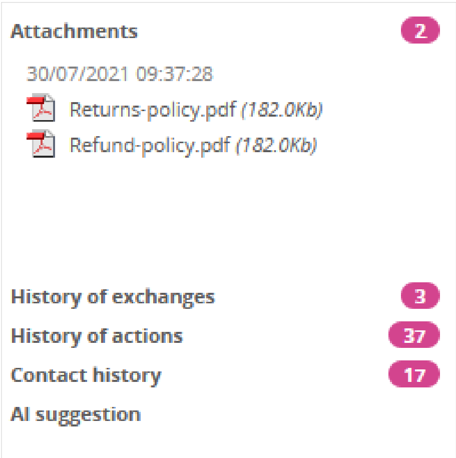
Warning: supervisors have the right to delete notes created by their agents.

1. Click the **List of folders** button () in the taskbar.
2. Select the desktop in which the affected folder is stored.
3. If you do not know, perform a folder search.
4. Click the folder to be noted: its content is displayed on the screen.
5. Click the **Delete** button ( ).

   The note is deleted and the list is reorganised.

9.13.2 Widgets

A widget is an assistance accessory that helps you to process a folder, by giving you simple information about it. When you view a folder, the widgets are displayed below the notepad:



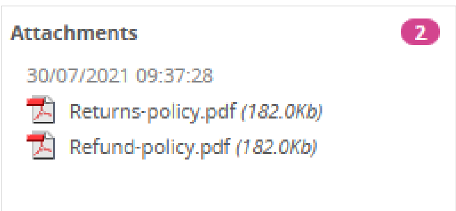
To view a specific widget, click its name. The number of elements affected is given for information.

9.13.2.1 Available widgets

- Attachments
- History of exchanges
- History of actions
- Contact history
- AI suggestion

9.13.2.2 Attachments

This widget lists all the files, without exception, that were attached to the folder during the exchanges. These are grouped by message date and sorted in descending chronological order (from the most recent to the oldest). The file size is specified in parenthesis. The widget is only displayed if there is at least one attachment to the folder.

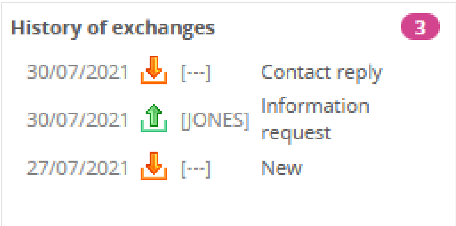


You can view the details of each attachment by clicking the corresponding link. It is then opened with the application used by default for this file type.

Warning: it is not possible to delete an attachment.

9.13.2.3 History of exchanges

This widget lists all the exchanges that occurred during the processing of the folder:



For each exchange are specified:

- The creation date of the message,
- An icon indicating if it is an incoming ( ) or outgoing ( ) message,
- The name of the agent who sent the message if known,
- The action performed during this exchange.

If necessary, it is possible to access a detailed history by clicking any action from the list.

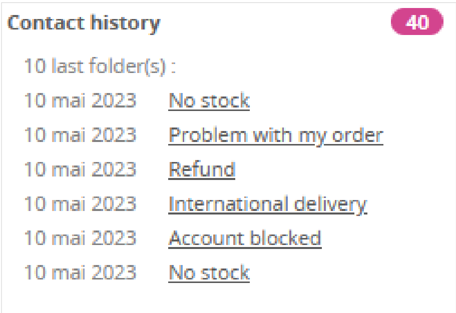
9.13.2.4 History of actions

This widget systematically traces all the actions performed on the folder, without exception, whether they were performed manually by an agent or generated automatically by the system. It is useful when you need to perform a search, or if you want to read the folder.

The widget details, for each action performed, its date and the name of the person who performed it.

9.13.2.5 Contact history

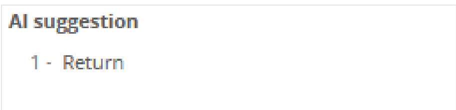
This widget displays the last 10 folders of the **In progress** desktop from the same contact, specifying the date and subject for each of them. The number in the red bubble indicates the total number of exchanges.



By clicking the link of a folder, the detailed history of the contact's exchanges and folders are displayed.

9.13.2.6 AI suggestion

The ALE Connect platform has an artificial intelligence engine, that can suggest response templates sorted by relevance, after analysing the folder. This widget displays the response templates found:



Click one of them to insert it directly into the body of the reply message.

9.13.3 Browsing context

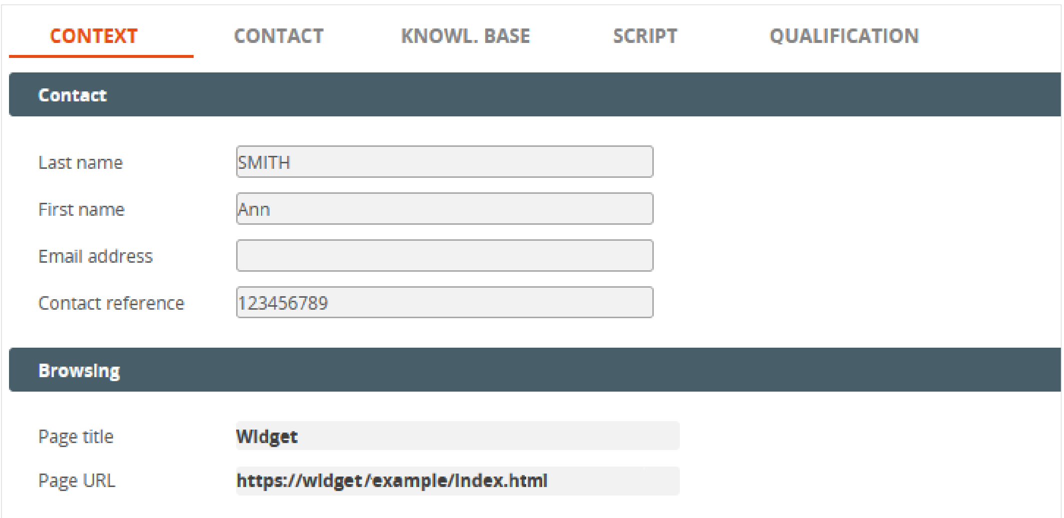
When you dialogue with a web user via chat, Facebook Messenger or Twitter, ALE Connect provides additional information about the user's identity and his/her browsing context (page from which the user writes for example). This data cannot be modified: they are mainly intended to help you understand the situation better.

9.13.3.1 Chat folder

ALE Connect retrieves some data provided by the widget, i.e. the dialogue box from which the web user writes to you. It can be used as criteria to search the contact, according to the setup performed by the administrator. In that case, the search is automatically launched: if only one contact sheet is found, it is automatically associated with the chat in progress.

The fields displayed in this tab are suggested by default. This form can nevertheless be customised. We invite you to contact the ALE Connect coordinator for further information.

Warning: the context information is not accessible if the chat has been requalified to a realtime queue belonging to a different business unit than the one on which the interaction initially arrived.



The Contact section displays by default the following data if it has been entered on the customer website:

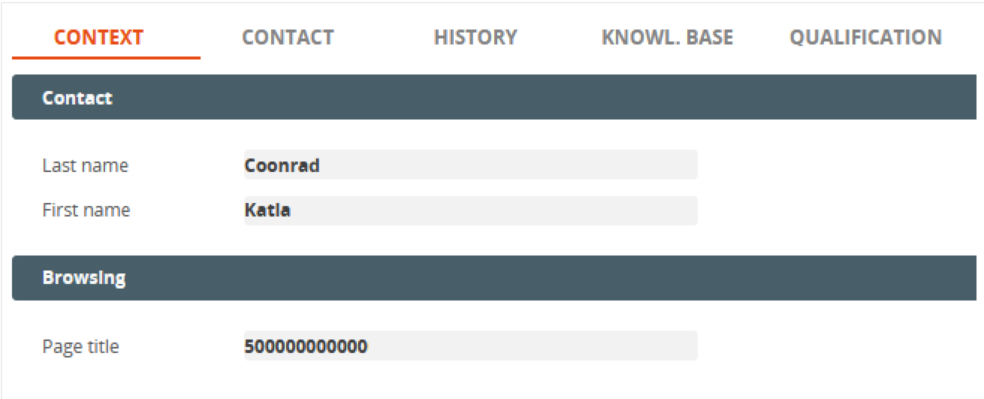
- the **last name** and the **first name** of the web user with whom you are currently in conversation,
- his/her **email address** as entered on the customer web site,
- the **contact reference** assigned to the web user by the customer website.

The Browsing section displays by default:

- the **title of the web page** from which the chat in progress was initiated,
- the **URL address** of this web page.

9.13.3.2 Facebook Messenger folder

Like chat, the tab allows you to view information related to the web user and his/her browsing context. The retrieved data can be reused as criteria to search the contact and associate it with the Messenger folder being processed.

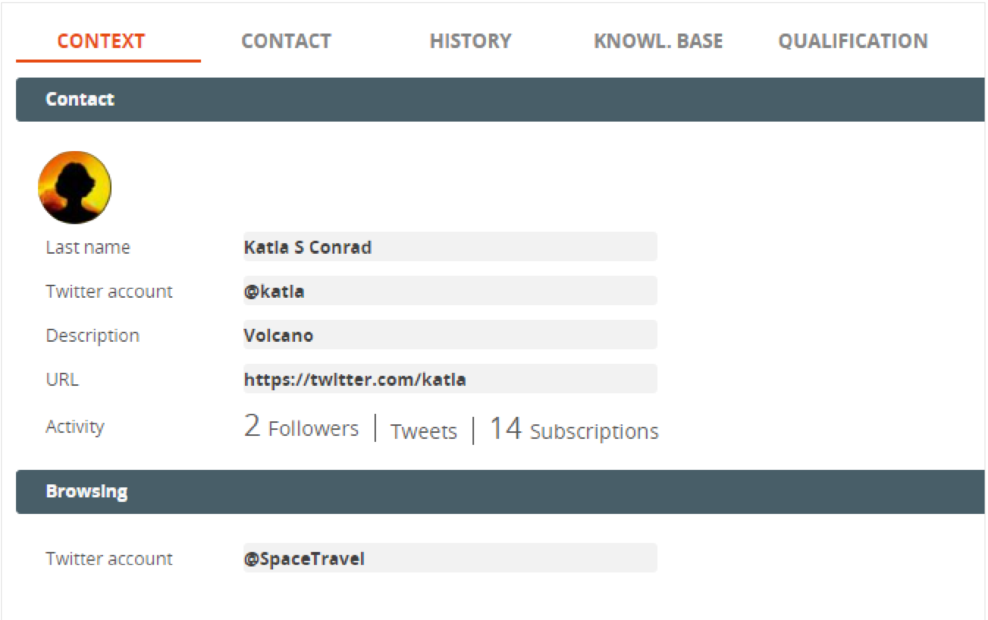


ALE Connect displays:

- the web user's **profile picture** if existing,
- the **last name** and the **first name** of the web user with whom you are currently in conversation,
- the Facebook page **ID** from which the current conversation was initiated.

9.13.3.3 Twitter folder

Like chat, the tab allows you to view information related to the web user and his/her browsing context. The retrieved data can be reused as criteria to search the contact and associate it with the Twitter folder being processed.



The **Contact** section displays by default the following data if it has been entered on the customer website:

- the web user's **profile picture** (if existing),
- the user's **name** from Twitter,
- his/her Twitter **account**,
- the **description** of this account as entered,
- the **URL** address of the account,
- the account activity illustrated by 3 indicators: **number of subscribers** to the account, **number of tweets** posted by the web user, and **number of subscriptions** allowing you to evaluate his/her popularity,
- the **contact reference** assigned to the web user by the customer website.

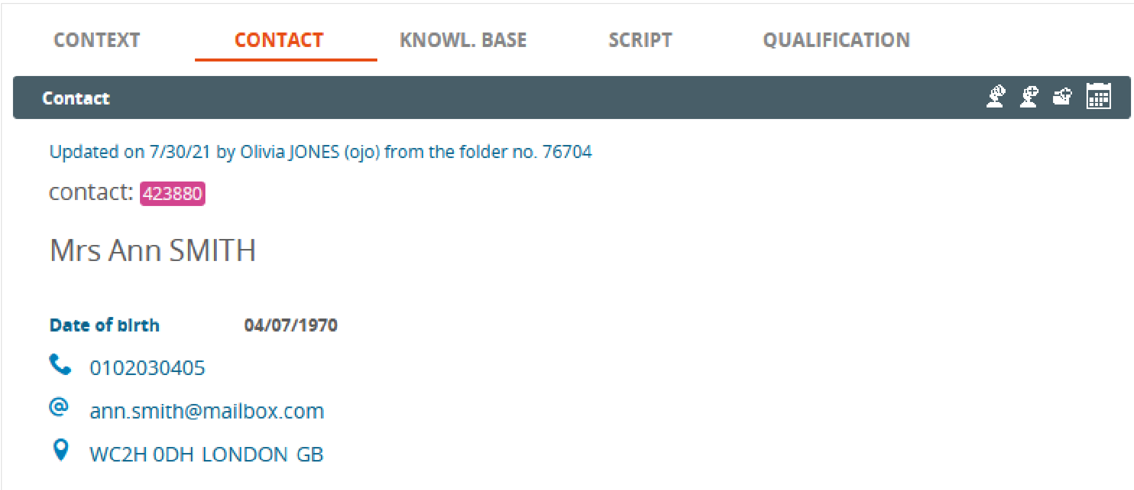
The **Browsing** section displays the Twitter account to which the web user has addressed the request.

9.13.4 Folder's contact

When processing a folder, a **Contact** tab is displayed by default on the right of the workspace: it allows you to identify immediately who initiated the interaction.

9.13.4.1 The contact exists in the database

ALE Connect has found the contact and displays his/her personal information from his/her contact sheet.



If, while processing the folder, you find errors or missing elements, you can modify the contact sheet by clicking the corresponding button. It is possible to refresh the page by clicking the button.

If the associated contact is not correct, other options are available:

- Search a contact
- Create a contact
- Create another folder for this contact
- Create a task for this folder

9.13.4.2 The contact is anonymous

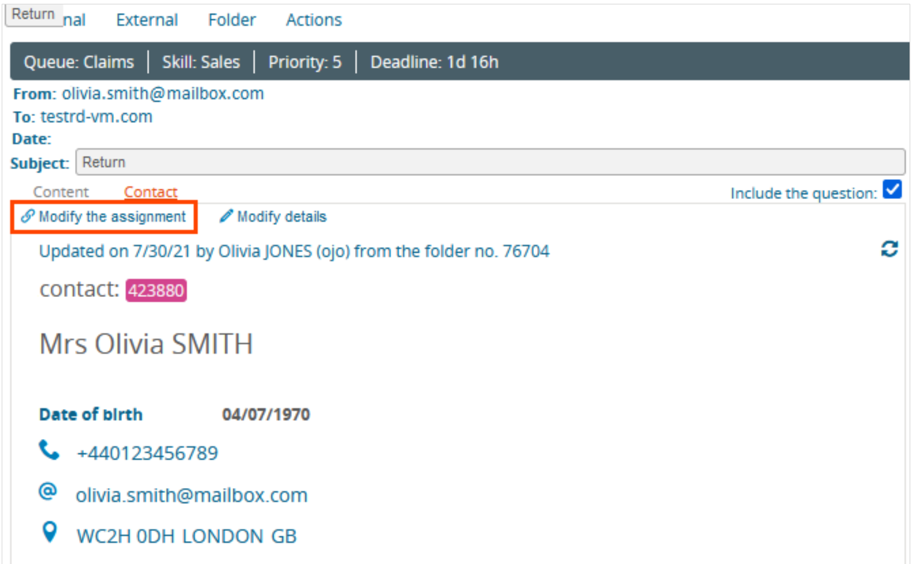
ALE Connect did not find any contact sheets matching the folder. However, it does not necessarily mean that the sheet does not exist. For example, the contact has sent an email to the centre in the past; folder for which his/her contact sheet has been created in the database, but without a phone number. You can then search the contact or create a sheet. If the contact is found, associate it with the interaction in progress: simply click the corresponding line, and then click the **Associate contact** button. The association updates the contact ID, history and latest known events. Otherwise, you can return to the search results screen by clicking the ◀ button.

Warning: a contact sheet will be automatically created by the system, if you do not do so during the processing of the folder.

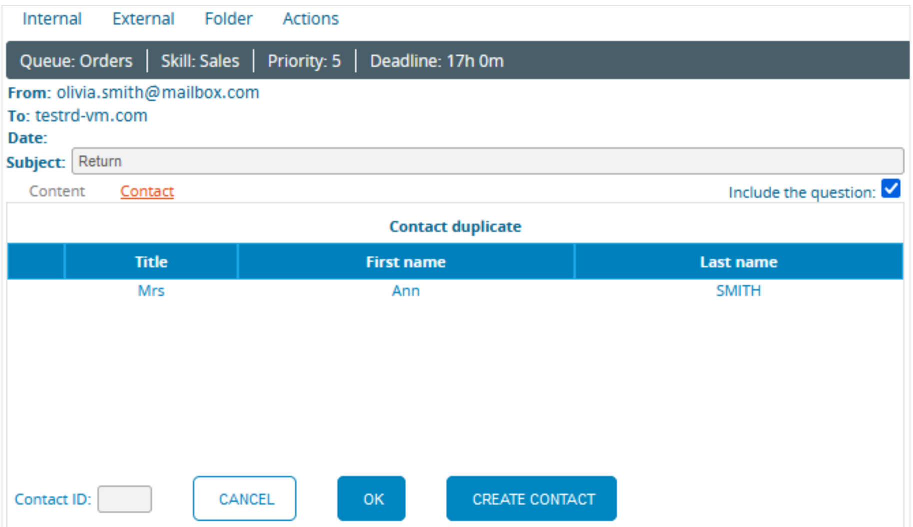
9.13.4.3 The contact associated with the folder is incorrect

You can change the contact associated with a folder, even after the interaction has ended. This action is useful when the contact initially assigned is not correct or if no contact could be assigned to the folder (ex: unexpected closing of the browser, network problem, etc.).

1. Click the **List of folders** button (📁).
2. Select the affected desktop.
3. If necessary, perform a folder search to find the folder for which the contact needs to be changed.
4. Open the affected folder by clicking the corresponding line. Its detailed information is displayed on the screen.
5. Click the **Contact** tab, and then the **Modify the assignment** link.



ALE Connect automatically suggests the contacts from the database that might match the folder (by comparing the folder data with the contact data):



6. Check the contact to be associated with the folder: ALE Connect immediately changes the assignment and returns to the previous screen.

   However, if the contact does not appear in the list, you can either search him/her by entering his/her ID (if known), or create a sheet by clicking the corresponding button.

   If none of these proposals suit you, or if you wish to abandon this action, click **Cancel**.

9.13.5 Contact history

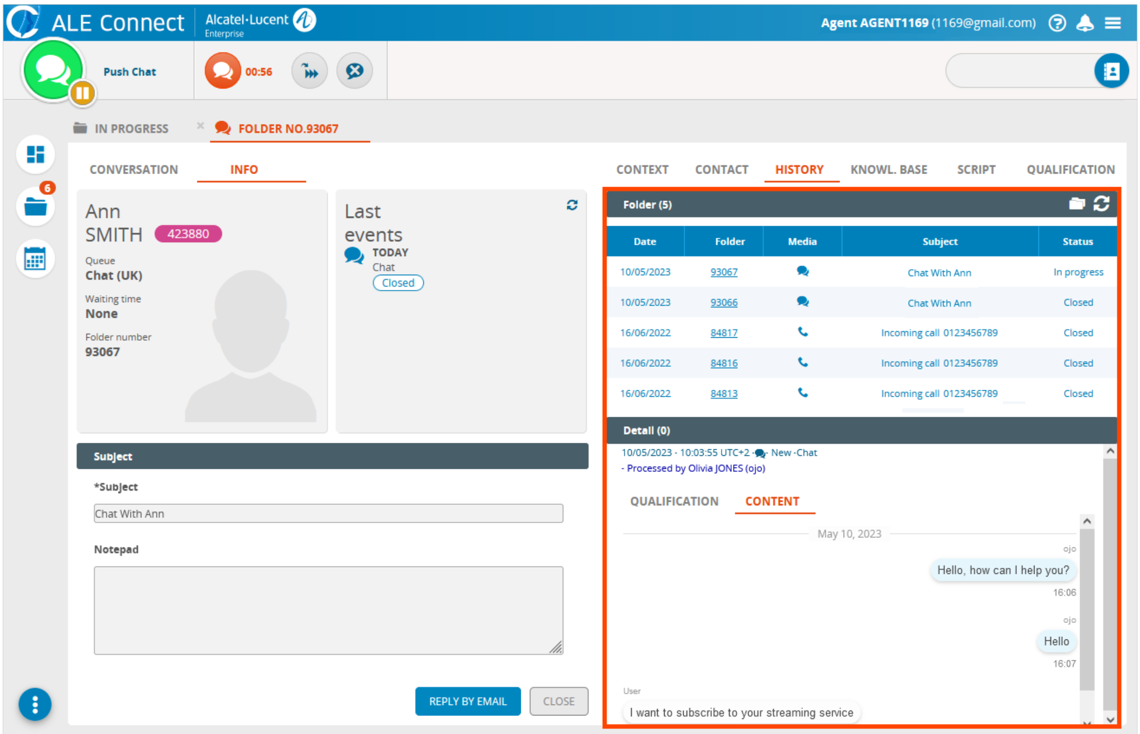
When you are processing a folder, you can view the contact history. It traces, without exception, all interactions managed with ALE Connect, all media included. It is particularly useful when you need to search a folder that you have not been involved in. Do not forget that you can also launch a contact search to view the sheet and access the history.

Warning: you can view all the contact's folders in the history, whatever your rights. However, if you do not have the right to view the detailed content of a folder, a message informs you when you click its number.

9.13.5.1 Voice, Chat, Facebook Messenger, Twitter folder

The history is accessible from a tab with the same name on the right of your workspace. It is only displayed when the contact is already identified in the database.

1. Start processing a folder.
2. Click the **History** tab.



You can view the contact's folders, ordered from the most recent to the oldest according to the folder processing date (field not visible on the interface). For each of them, ALE Connect displays its **creation date**, unique **ID**, initial **media**, initial **subject** and its current **status** (closed, in progress, etc.). You can view any of the folders in this history (except the one currently being processed) by clicking its number: it is then opened in a new tab.

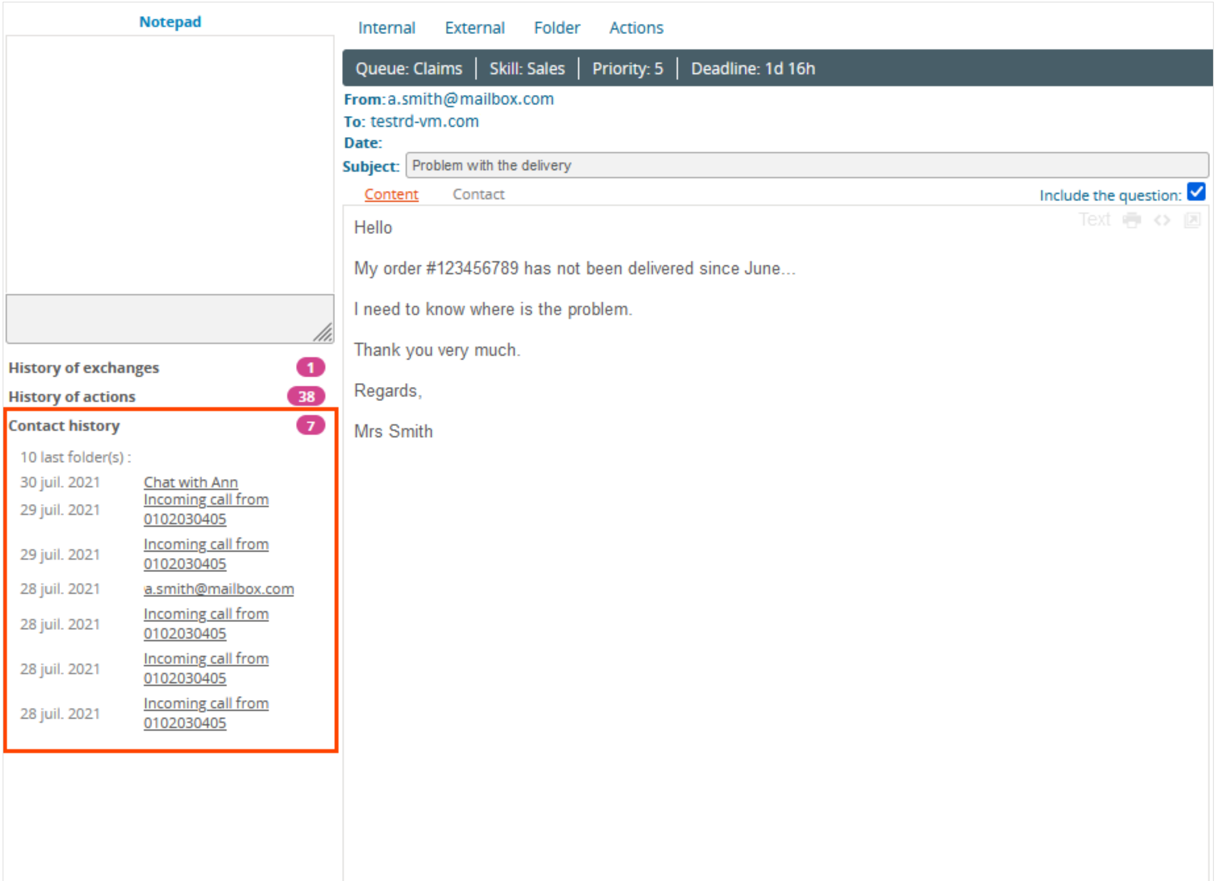
In the lower part of the window, by clicking the desired folder, you can view its detailed characteristics. For an email folder, it is possible to view the detailed content of each exchange. You can then view the exchange in text or HTML format, or view the source code by clicking the corresponding tab.

From the title bar, you can merge folders (📁) or refresh the displayed data (🔄).

9.13.5.2 Email folder

There is no separate tab here because the folder is presented differently: the only way to access the history of the contact folders is to open the corresponding widget.

1. Start processing an Email folder.
2. Click the Contact history widget on the left of the screen.



It displays the last 10 contact folders in the **In progress** desktop.

9.13.6 History of exchanges

This history details all the exchanges that occurred not only for the folder in progress, but also for all those of the contact affected. It is accessible from the History of exchanges widget when you view a folder.

The history is divided into 3 parts:

- list of contact folders,
- history of exchanges for a selected folder,
- detailed content of a selected exchange.

9.13.6.1 List of contact folders

Located at the top left of the window, this area displays all the ALE Connect folders of the contact associated with the current folder:

Folder

Date	Number	Subject	Queue	Skill	No.	Status	Master	Child
10/05/2023 12:04:03	93077	How to cancel my order?	Sales (Email pull)	Sales	1	To be processed	○	☐
10/05/2023 11:55:21	93076	Problem with my order	Sales (Email pull)	Sales	1	To be processed	○	☐
10/05/2023 11:51:46	93075	Refund	Sales (Email pull)	Sales	1	To be processed	○	☐
10/05/2023 11:51:36	93074	International delivery	Sales (Email pull)	Sales	1	To be processed	○	☐
10/05/2023 11:51:25	93073	Account blocked	Sales (Email pull)	Sales	1	To be processed	○	☐
10/05/2023 11:48:35	93072	No stock	Sales (Email pull)	Sales	1	To be processed	○	☐
10/05/2023	[illegible]	[illegible]	Sales (Email	[illegible]	[illegible]	To be		

Page 1/1

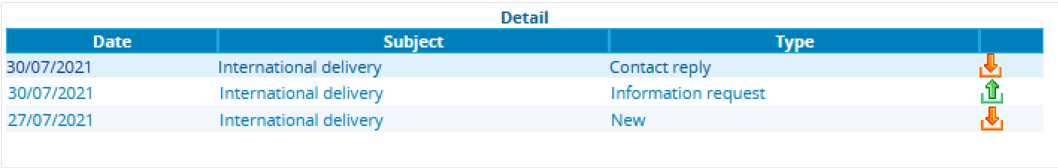
For each folder, you can view:

- its creation **date** and time,
- its clickable **number** to read the folder (access to the content only if you have the rights),
- the **subject** of the request,
- its **queue**,
- the required **skill**,
- the total **number** of exchanges that occurred during the processing of the folder,
- its current status,
- two **Parent/Child** options to merge folders.

Click the **subject** of a folder to display the details of its exchanges, on the right of the window.

9.13.6.2 Exchanges of a folder

Located to the right of the window, this area displays all the exchanges occurred when processing the selected folder, since its creation. They are sorted by descending chronological order from the most recent to the oldest:


Detail

Date	Subject	Type	
30/07/2021	International delivery	Contact reply	
30/07/2021	International delivery	Information request	
27/07/2021	International delivery	New	

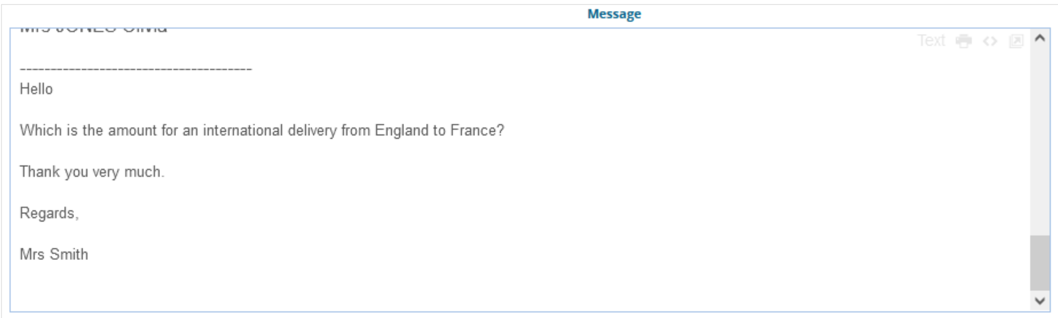
You can view for each exchange:

- its **creation date**,
- its **subject**,
- the **type** of message,
- an **icon** indicating if it is an outbound ( ) or incoming ( ) message.

Click the subject of an exchange to view its content, at the bottom of the window.

9.13.6.3 Zoom in on an exchange

This area displays the detailed content of the selected exchange, as entered and formatted:



If necessary, you can also view any of its **attachments**.

When you hover over the upper right corner of the message, a **toolbar** is displayed:

Text/HTML	Allows to choose the display format of the message.
	Start printing the message from a new tab of the current browser.
	Displays the source code of the page in a pop-up window (functionality strictly reserved to supervisors and coordinators).
	Displays the content of the message in a pop-up window, for an optimised reading.

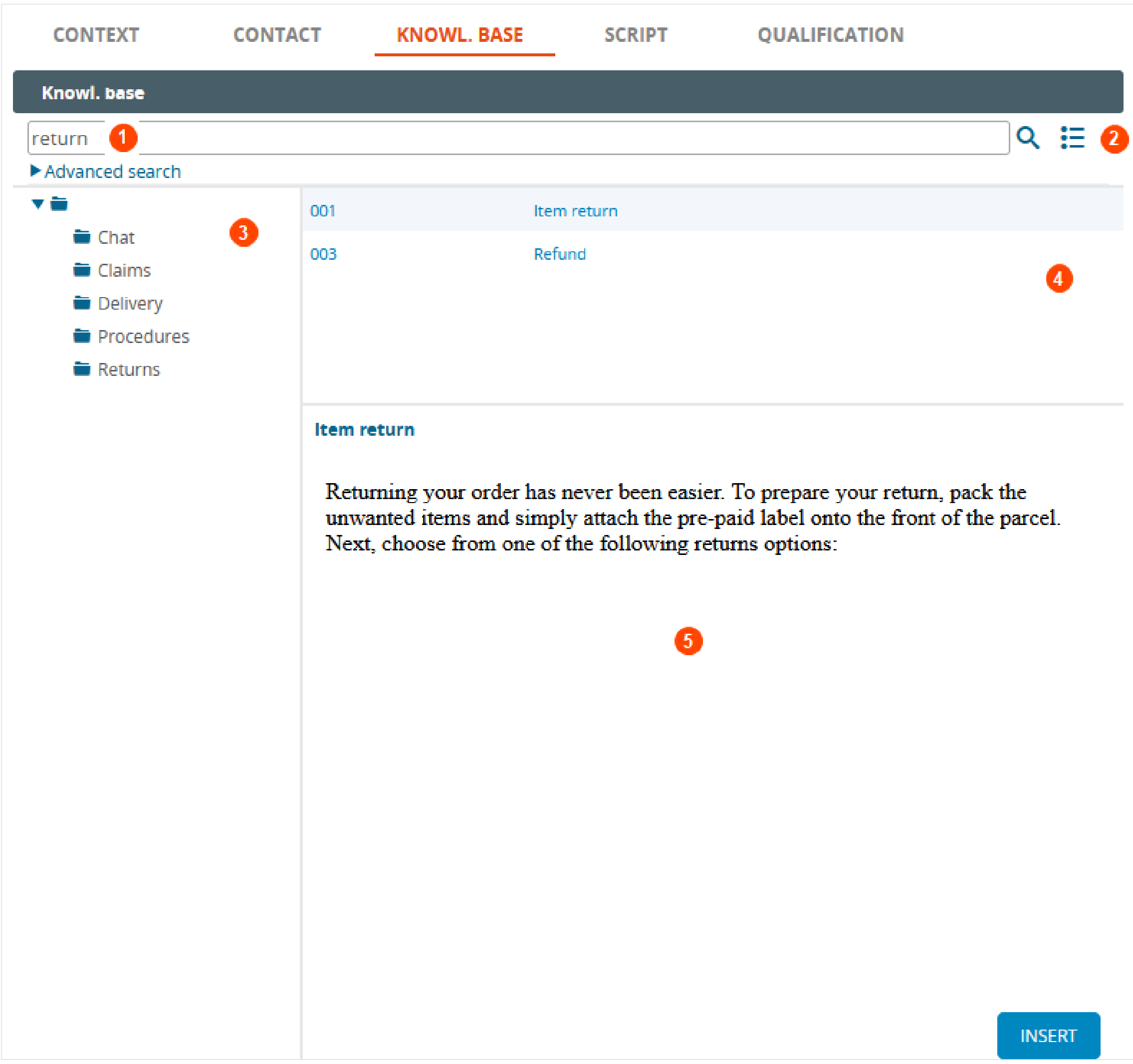
9.13.7 Knowledge base

Some questions or requests are frequently asked to the contact centre. For this reason, ALE Connect provides you a knowledge base containing response templates. These ready texts have two benefits: to limit entry errors (or misunderstandings) and to reduce the time needed to process a folder. They will prevent you from rewriting the same explanations over and over again. Response templates are particularly recommended to process emails, chats and Facebook Messenger conversations.

Warning: as agent, you cannot add or delete response templates in the knowledge base. This base is fed either by a coordinator, or by supervisors (when they validate the response templates suggested by their agents).

9.13.7.1 Searching a response template

When you process a folder, the knowledge base is accessible from the tab with the same name (except for email folders which have a different interface).



Here you can search a response template to the contact request.

For this purpose, there are 3 methods:

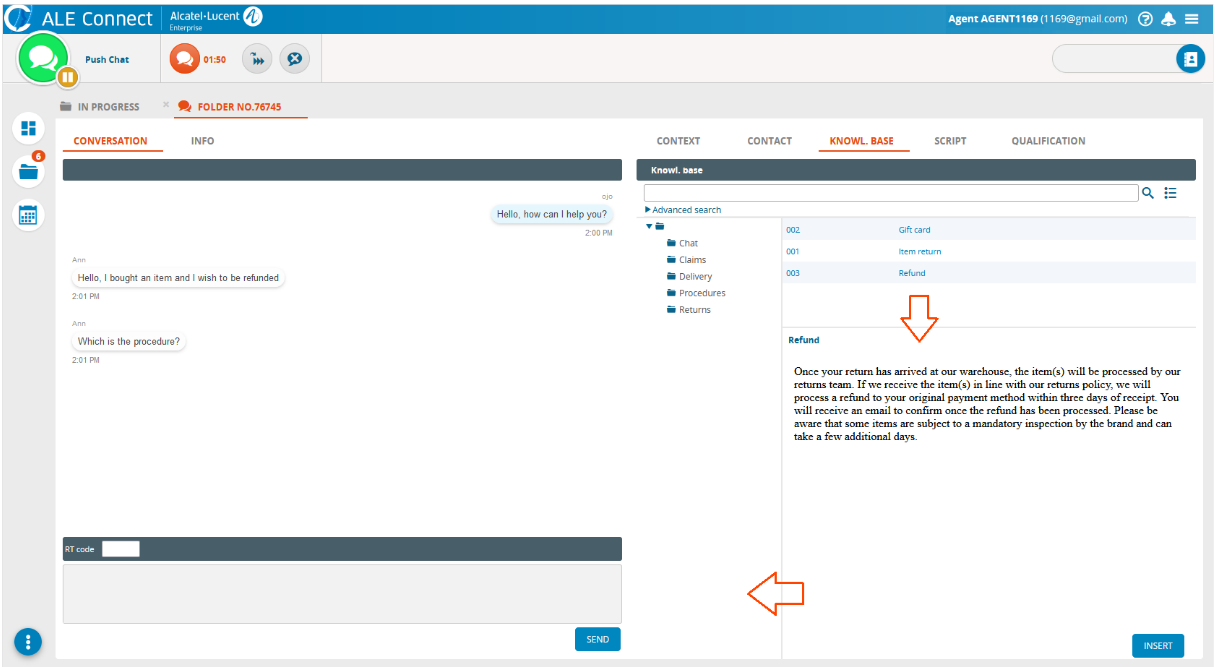
- **Enter a character string in the entry area (1)** that will be searched in the title, the body (criterion checked by default) and the keywords of response templates. Then simply click the magnifying glass to launch the search. By clicking **Advanced search** (▼), you will display all the criteria and refine the selection. Ex: if you type the word “Return” and check the Title and Body options, ALE Connect will only display the response templates containing the word "Return" in both their title and body. If a response template contains this word only in its title, it will not be displayed as results.
- **Display the full list (2)** by clicking the **List** button (). Then, scroll through the results to find the desired response template.
- **Explore the directories from the tree (3)** on the left of the screen. Indeed, response templates are classified by theme. Open the desired directory to find the response template you are interested in.

In all cases, if at least one result is found, ALE Connect displays the **list of the response templates found (4)**. The lower part presents the **details of the response template (5)** selected by default. You can click any response template to view it. If an **attachment** is linked to the response template, an icon appears at the bottom of the window. If you insert it into the email for example, the attachment will also be attached.

9.13.7.2 Inserting a response template in a chat

Only **response templates of message type** can be used in chats. Only a coordinator or supervisor is authorised to set them up.

1. Accept to support a chat.
2. Click the **Knowledge base** tab.



3. Perform a search in the knowledge base.
4. Select the response template to insert into your reply.
5. Click the **Insert** button.

   You can also copy and paste the text of the response template in the entry area, or enter its RT code if you know it.

   The response template is then inserted into your message.
6. Change the text if you wish to customise your reply before sending.
7. Send your reply.

9.13.7.3 Inserting a response template in a Messenger conversation

Like chat, only response templates of message type can be used in Facebook Messenger conversations. Only a coordinator or supervisor is authorised to set them up.

1. Accept to support a Messenger conversation.
2. Click the **Knowledge base** tab.
3. Perform a search in the knowledge base.
4. Select the response template to insert into your reply.
5. Click the **Insert** button.

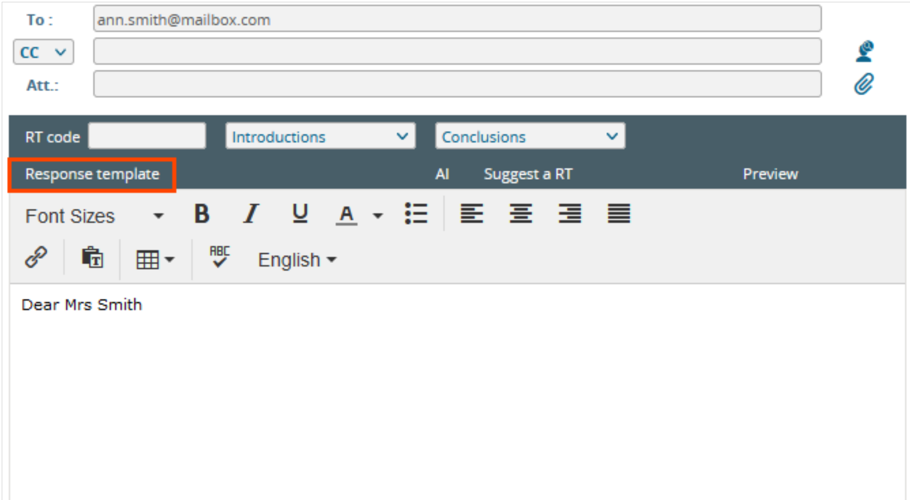
   You can also copy and paste the text of the response template in the entry area, or enter its RT code if you know it.

   The response template is then inserted into your message.
6. Change the text if you wish to customise your reply before sending.
7. Send your reply.

9.13.7.4 Inserting a response template in an email

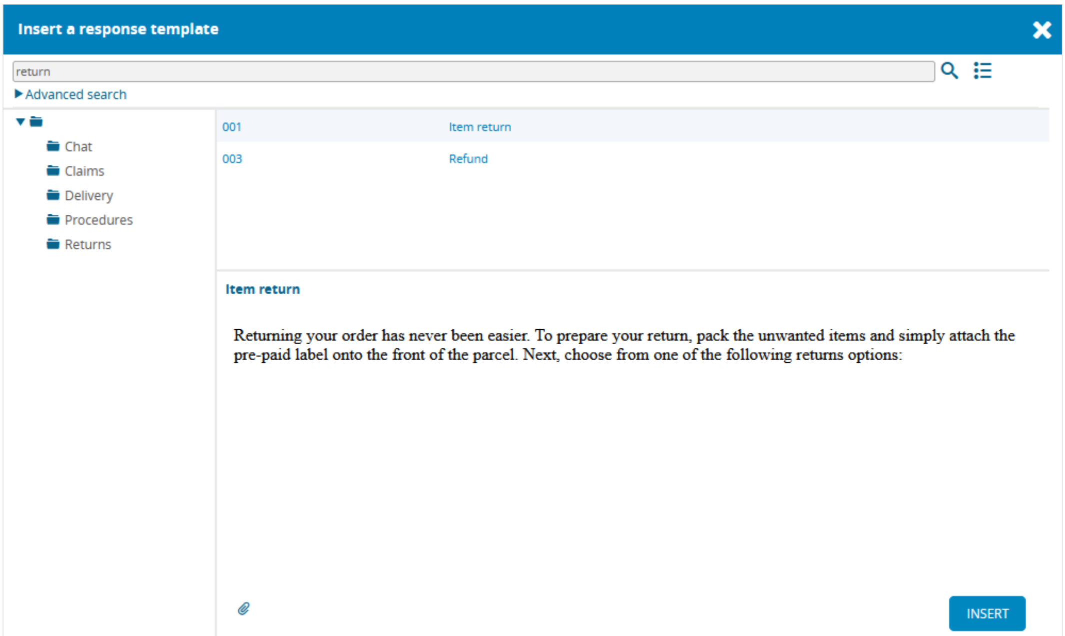
Email folders have an interface different from other media: there is no **Knowledge base** tab. Response templates are accessible in another way. For the rest, the use is the same.

1. Support an email (push or pull mode).
2. Once the folder is opened, click in the part reserved to the reply:



3. Click the place where the response template should be inserted.
4. Click the **Response template** link.

   The following window is displayed:



5. Perform a search in the knowledge base.
6. Select the response template to insert into your email.

7. Click the **Insert** button.

   You can also copy the text of the response template (then paste it into the reply area after closing the window).

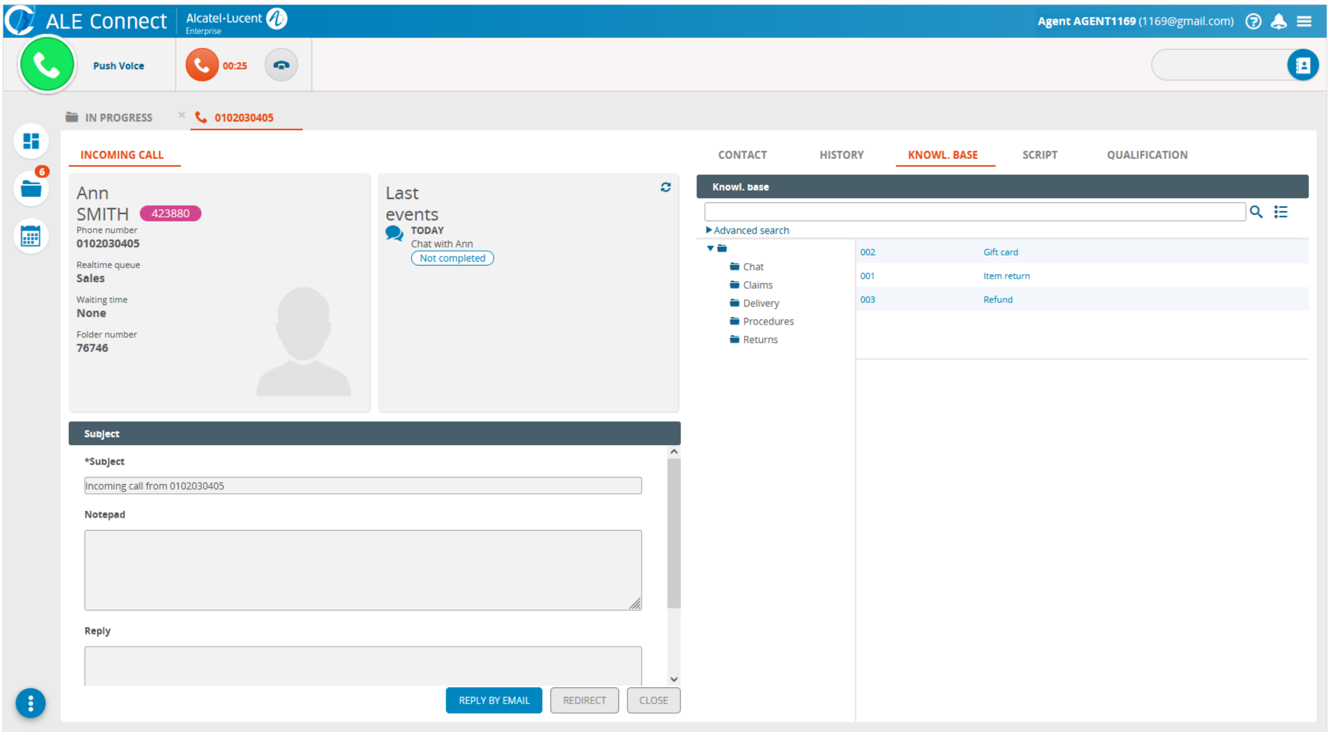
8. Close the window when you have finished.

   The response template is inserted into the body of the email, with its attachments (if existing).

9.13.7.5 Inserting a response template in a call

For the Voice folders, the knowledge base does not allow to insert a response template since the dialogue with the correspondent is oral. This is why the insert button is not present.

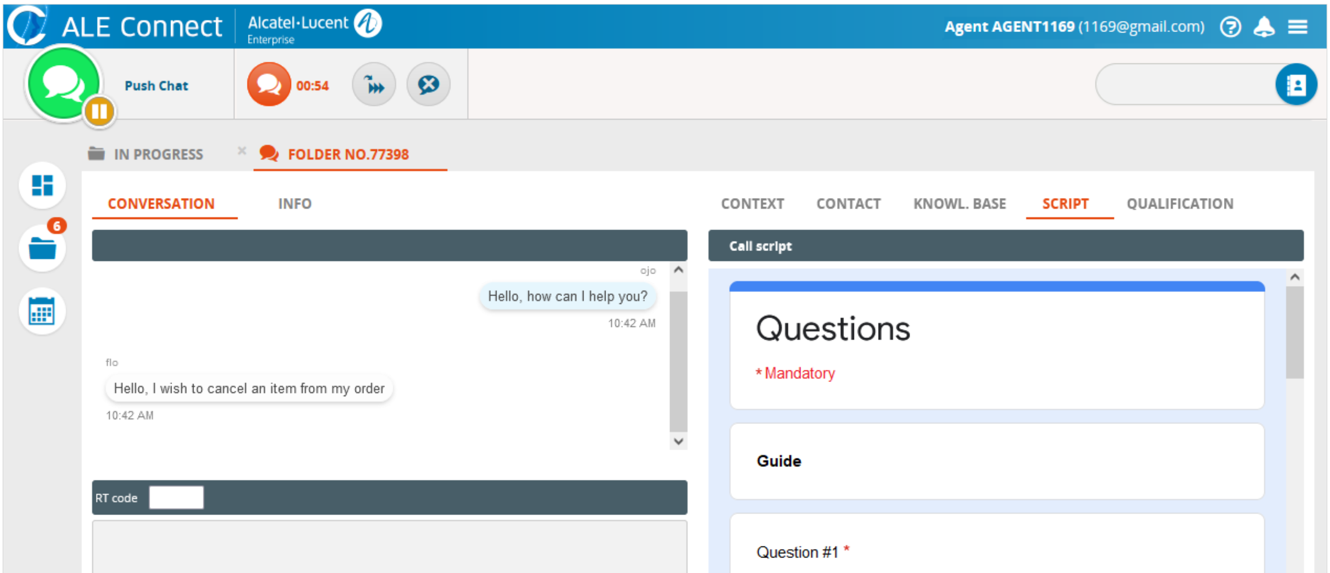
Nevertheless, response templates are very useful because these can **guide you** to respond to your contact requests. Thanks to the search area, you can quickly find a response template on the desired theme. This will give you the **same speech as an answer that would have been given in writing**. In addition, the knowledge base also allows you to access attachments (for example, business procedures).



9.13.8 Conversation script

The conversation script is a questionnaire with a series of questions organised in a relevant way. The agent relies on it to guide the dialogue with his/her interlocutor and to collect possible information.

With ALE Connect, when you process an incoming call, a chat, a Facebook Messenger or Twitter interaction, you can guide the conversation relying on a script. As soon as the folder is opened in your interface, the Script tab is automatically displayed by default on the right of your screen:



The use of a script is optional: its display depends on the setup performed by the coordinator. If the tab does not appear, it means that no script has been defined to process the interactions of the queue.

Conversation scripts are developed with an external application (example: Google Forms). Its content and management are not under the control of ALE Connect, that will simply display it in the folder. The saved data therefore belongs to the external application. If you have any questions regarding the use of a conversation script, we invite you to contact your supervisor or read the documentation for the application affected.

While the folder is being processed, scroll through the conversation script, and write the answers or desired information. You can click another tab and come back to it later, if necessary, as long as the folder is not closed. The script remains accessible even during the wrap-up time. Your entire entry can only be viewed from the external application, as it owns the script data.

9.13.9 Qualifying a folder

The qualification of a folder consists in collecting information in order to find out the reasons of the initial contact. The objectives of this census are multiple:

- analysing the activity of the contact centre and more widely of the brand,
- adapting processes and working methods according to the results,
- optimising the organisation of teams and resources allocated.

Any interaction, whatever its media, can be qualified according to one or several criteria classified by themes. The available criteria, obligation or not to enter, and the number to be filled in are defined by the coordinator.

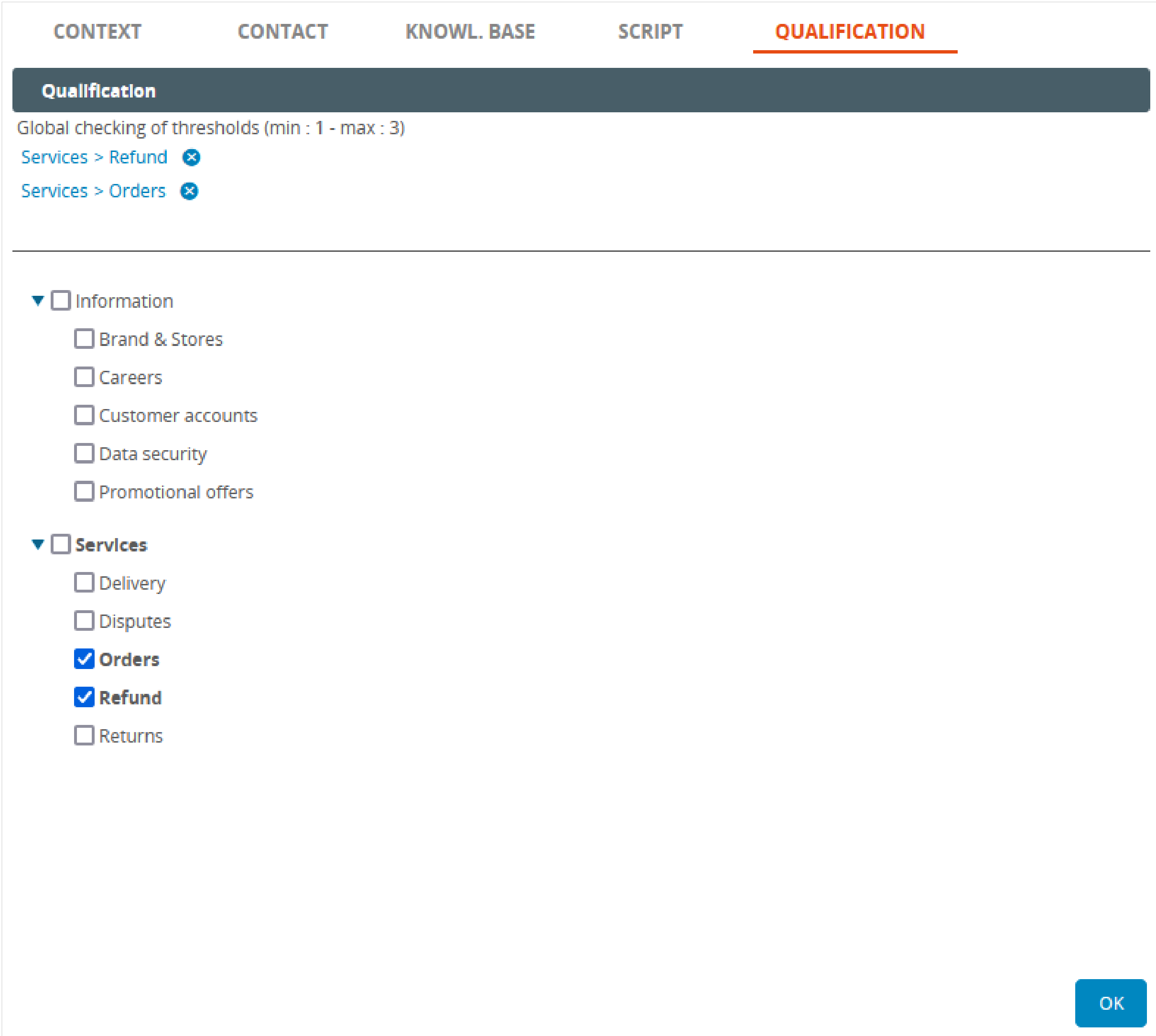
There is an exception for emails: when you assign qualification criteria when replying, these are assigned to the exchange affected and only to this one. In other words, it is possible to qualify each exchange that occurs between the contact and the agent in a folder. This folder then cumulates all the qualification criteria that have been assigned to all the exchanges.

9.13.9.1 During the processing

The qualification can be performed on two specific moments: **during the processing of the folder** (without ending it) or at its closing, **during the wrap-up time**.

1. During the interaction, click the **Qualification** tab on the right of your workspace.

   The following screen is displayed:



2. Check the **criteria** matching the interaction.

   According to the setup, a minimum and/or maximum number of criteria may be required: this rule is specified on top of the window. The criteria already selected are also displayed. You can remove the selection of a criterion by clicking the icon.

3. Click **OK** to save your entry.

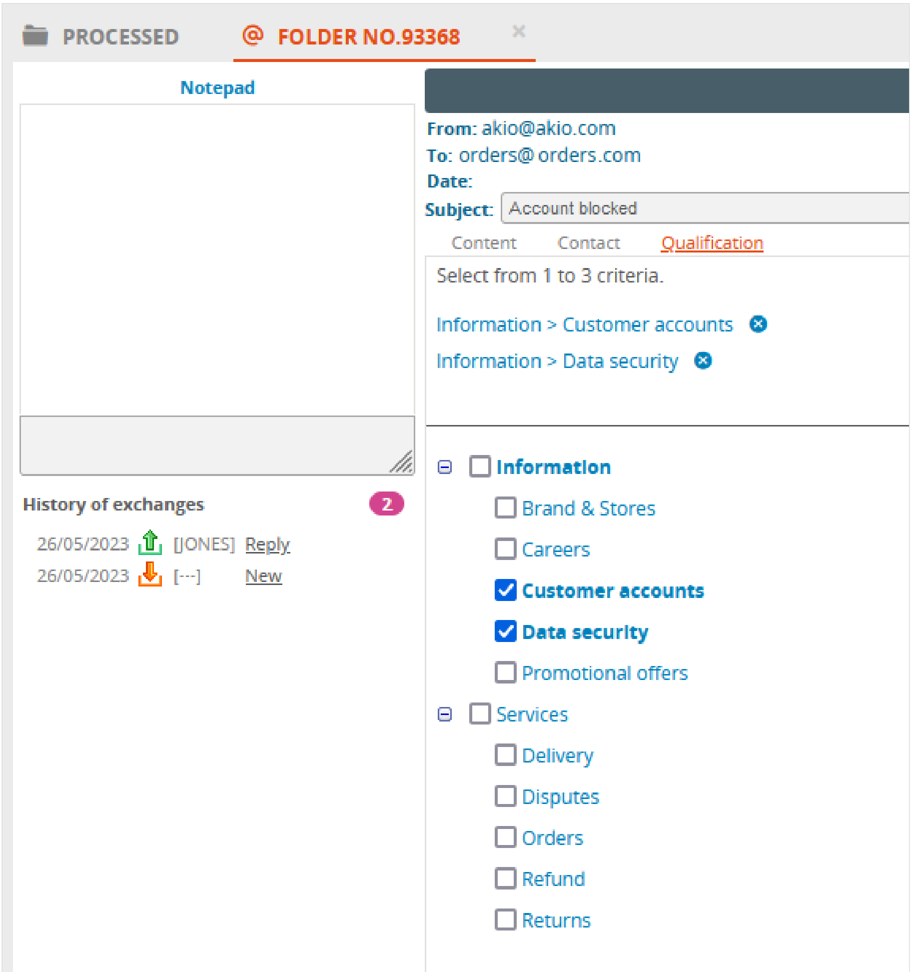
   The folder is now qualified.

9.13.9.2 After creating the folder

When an interaction has not been qualified while processing it, you can assign criteria to it, or modify them later. The qualification can be performed on any folder, regardless of the desktop in which it is stored.

1. Click the **List of folders** button (🖿).
2. Select the affected desktop.
3. If necessary, perform a folder search.
4. Open the affected folder by clicking the corresponding line: its detailed information is displayed on your screen.
5. Click the **Qualification** tab.

   Example of a processed email:



6. Check the **criteria** matching the folder.

   According to the setup, a minimum and/or maximum number of criteria may be required: this rule is specified on top of the screen. The criteria already selected are also displayed. You can remove the selection of a criterion by clicking the ⊗ icon.
7. Click **OK** to save your entry.

9.14 Inventory of actions

9.14.1 Redirecting a folder to a queue

The folder is not in the appropriate queue. You want to redirect it to one of the appropriate queues on which you have redirection rights. The folder status remains the same. However, this action results in the freeing of the folder by dissociating the agent who was possibly assigned to its processing.

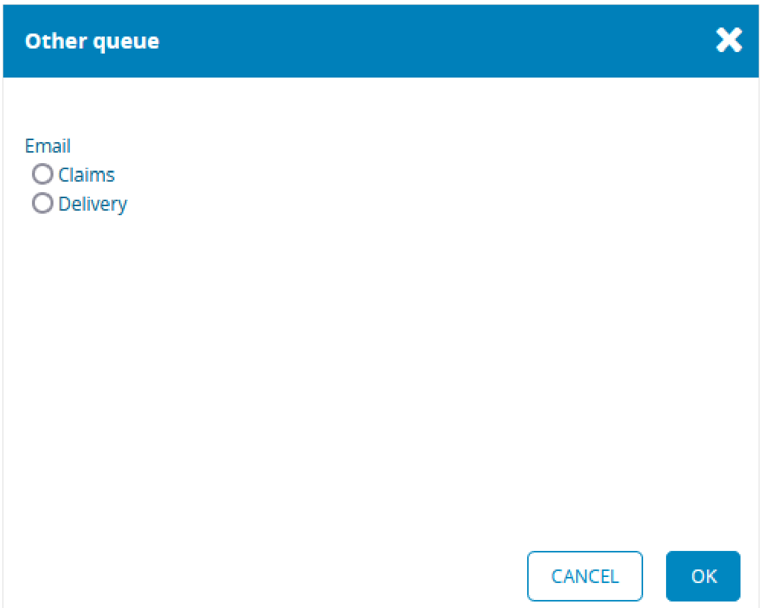
Warning: it is not possible to redirect a folder to a Twitter queue.

9.14.1.1 Single folder

After redirection, the folder takes the default skill of the recipient queue. However, if this one has no default skill, the folder keeps its initial skill.

1. Click the **List of folders** button (🖿).
2. If necessary, perform a folder search.
3. Open the affected folder by clicking the corresponding line: its detailed information is displayed on your screen.
4. From the Internal tab, click **Other queue**.

   The following window is displayed:



   The access right to the queue can be specified if it is different from “Read/Write".

5. Select the new queue to be assigned to the folder.
6. Click **OK** to confirm your choice, or **Cancel** to abandon this action.

   ALE Connect redirects the folder to the queue, and then closes the corresponding tab.

9.14.1.2 Group of folders

This action allows you to redirect several folders to the same queue at the same time, even if they come from different queues. After redirection, all the folders take the default skill of the recipient queue.

1. Click the **List of folders** button (🗀).
2. If necessary, perform a folder search to find the ones you are interested in.
3. Check the folders to redirect.
4. Click the **Group** button (🗀).
5. Select the **Redirect to another queue** grouped action.

   A window displays a list of recipient queues. The queues of origin of the selected folders are not displayed.
6. Select the queue to assign to the folders.
7. Click **OK** to confirm your choice, or **Cancel** to abandon this action.

   ALE Connect immediately assigns the queue to the folders, which stay in the desktop.

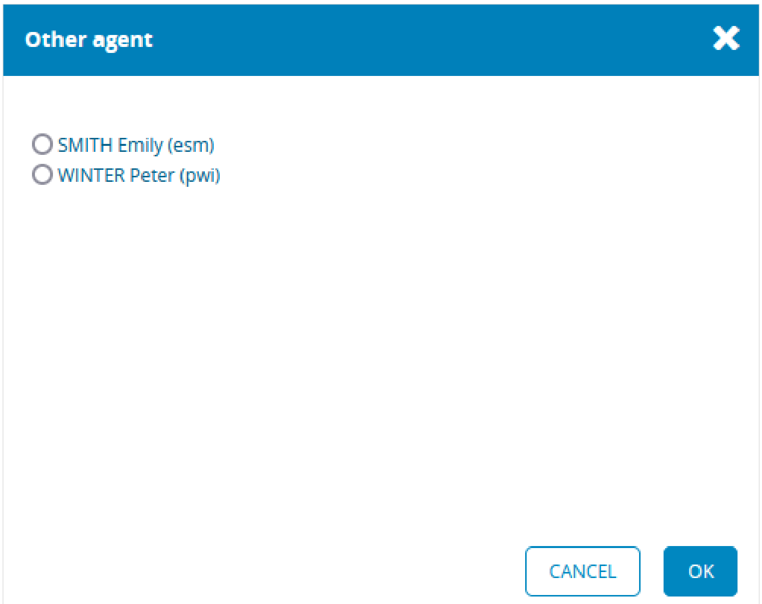
9.14.2 Redirecting a folder to an agent

You can assign an email folder to the agent of your choice. This action can be performed regardless of the characteristics of the folder (status, processing deadline, priority, etc.) and even if it is already assigned to an agent. The folder status remains the same.

9.14.2.1 Single folder

1. Click the **List of folders** button (📁).
2. If necessary, perform a folder search.
3. Open the affected folder by clicking the corresponding line: its detailed information is displayed on your screen.
4. From the Internal tab, click **Other agent**.

   ALE Connect displays the list of agents who have at least read rights on the queue of the folder:



5. Check the agent you want to assign to the folder.
6. Click **OK** to confirm your choice.

   ALE Connect immediately assigns the folder to the selected agent, and then closes the corresponding tab.

9.14.2.2 Group of folders

This action assigns all the grouped folders to a single agent of your choice.

Warning: this grouped action is available only if the selected folders all belong to the same queue.

1. Click the **List of folders** button (🖿).
2. If necessary, perform a folder search to find the ones you are interested in.
3. Check the folders to redirect.
4. Click the **Group** button (🖿).
5. Select the **To be processed by another agent** grouped action.

   ALE Connect displays all the agents who have at least read rights on the queue of the folder.
6. Select the agent you want to assign to the folder.
7. Click **OK** to confirm your choice.

   ALE Connect immediately assigns the folders to the selected agent.

9.14.3 Redirecting a folder to a skill

A skill is an ability, a professional know-how allowing the agent to perform various tasks (e.g. a mechanical skill to process the after-sales service repair folders). Skills are set up and assigned to agents on the ALE Connect administration interface. The system relies on the skills to distribute the folders to be processed to the most appropriate agents. For each skill, a level is evaluated between 0 and 5; 5 being the highest level of expertise. On the contrary, 0 means that the agent does not have the skill: he/she is therefore not eligible to process interactions that require it.

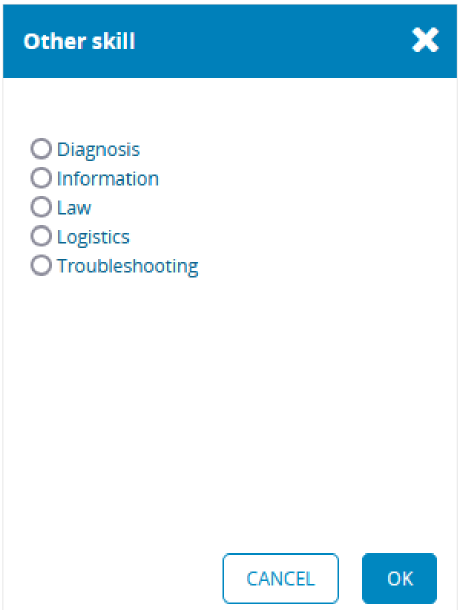
If the skill assigned to a folder is not suitable, you can modify it (if your user rights allow you to do so). The folder status is not affected by this change.

ALE Connect only suggests skills for which agents have at least **read rights on the queue, the language AND on the targeted skill.** This preselection prevents the folder from being redirected to an agent who could not see or process it.

9.14.3.1 Email folder

1. Click the **List of folders** button (📁).
2. If necessary, perform a folder search.
3. Open the affected folder by clicking the corresponding line: its detailed information is displayed on your screen.
4. From the **Internal** tab, click **Other skill**.

   The following window is displayed:



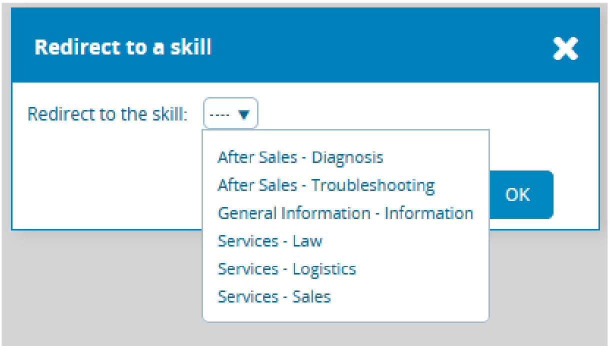
5. Select the new skill to assign to the folder.
6. Click **OK** to confirm your choice.

   ALE Connect immediately assigns the skill to the folder, and then closes the corresponding tab.

9.14.3.2 Facebook Messenger / Twitter folder

1. Click the **List of folders** button ( ).
2. If necessary, perform a folder search.
3. Open the affected folder by clicking the corresponding line: its detailed information is displayed on your screen.
4. Click the **Requalify** button from the remote control.

   The following window is displayed:



5. Select the new skill to assign to the folder.
6. Click **OK** to confirm your choice.

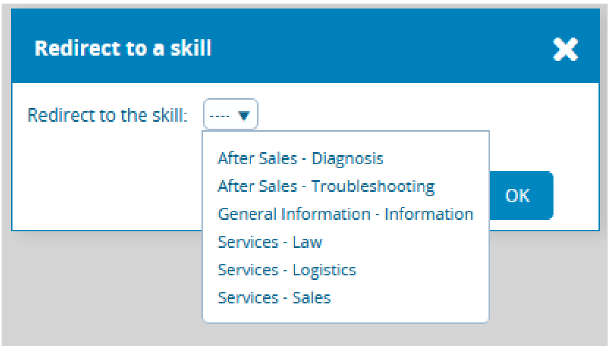
   ALE Connect immediately assigns the skill to the folder, and then closes the corresponding tab.

9.14.3.3 Group of folders

This action allows you to assign the same skill to several grouped folders, of different media or not.

If they come from different queues (whatever their priority level), the suggested skills are those of the group to which the agent belongs. However, if all these folders come from the same queue, ALE Connect suggests the list of skills for which there is at least one agent eligible to view or process these folders.

1. Click the **List of folders** button ( ).
2. If necessary, perform a folder search to find the ones you are interested in.
3. Check the folders to redirect.
4. Click the **Group** button ( ).
5. Select the **Redirect to another skill** grouped action.



6. Select the skill to assign to the folders.
7. Click **OK** to confirm your choice.

   ALE Connect immediately assigns the skill to the folders, which stay in the desktop.

9.14.4 Redirecting a folder to an expert

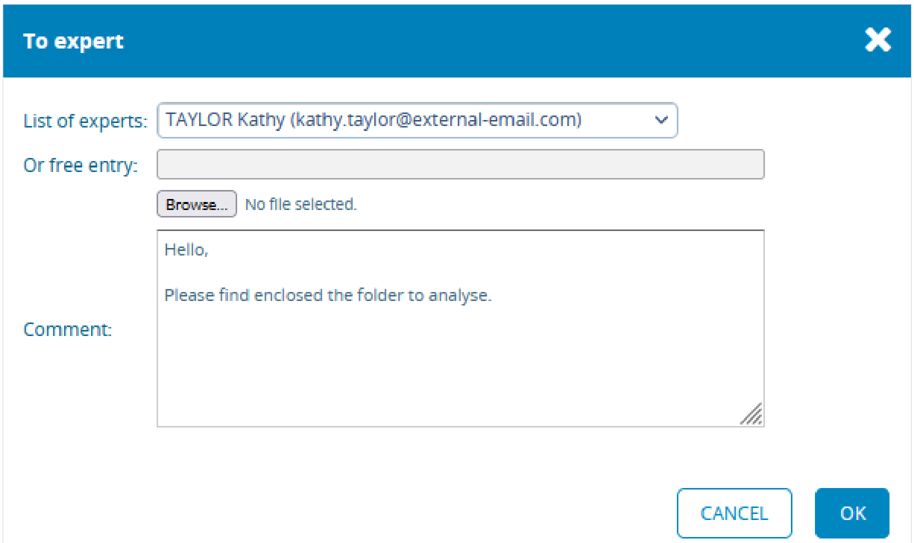
You have the possibility to send a folder to an expert, to ask his/her opinion on the answer to be given (if an official list of experts has been defined in the address book by the coordinator). The expert is usually in charge of performing study or consulting missions, scientific reviews or evaluations in a technical discipline. Once transferred, the folder changes to the Waiting for expert status and remains in the In progress desktop.

Warning: the processing deadline of the folder is automatically reset to 0, as soon as the sending is validated.

9.14.4.1 Single folder

1. Click the **List of folders** button (🖿).
2. If necessary, perform a folder search.
3. Open the affected folder by clicking the corresponding line: its detailed information is displayed on your screen.
4. From the **External** tab, click **To expert**.

   The following window is displayed:



5. Enter the email address of the experts to whom the folder must be sent.

   To one expert: select the email address from the list or enter it freely.

   To several experts: type the mandatory email addresses in the Free entry field, separating them by a comma. When typing, ALE Connect automatically displays addresses containing the entered character string (autocomplete). They are extracted from the address book associated with the queue of the folder.

   Warning: the free entry is an option activated or not by the coordinator.

6. If necessary, you can attach a file to this sending.
7. Write a comment for the expert if necessary.

8. Click **OK** to save your entry, or **Cancel** to abandon this action.

   ALE Connect sends the folder to the recipient expert by email, and then closes the corresponding tab.

9.14.4.2 Group of folders

Warning: this grouped action is available only if the selected folders all belong to the same queue.

1. Click the **List of folders** button (■).
2. If necessary, perform a folder search.
3. Check the folders to redirect.
4. Click the **Group** button (■).
5. Select the **To expert** grouped action.
6. Enter the email addresses of the experts to whom these folders will be transferred.

   To one expert: select the email address from the list or enter it freely.

   To several experts: type the email addresses in the Free entry field, separating them by a comma. When typing, ALE Connect automatically displays addresses containing the entered character string (autocomplete). They are extracted from the address book associated with the queue of the folder.

   Warning: the free entry is an option activated or not by the coordinator.

7. If necessary, you can attach a file to this sending.
8. Write a comment for the expert if necessary.
9. Click **OK** to save your entry, or **Cancel** to abandon this action.

9.14.4.3 From the expert's side

The expert receives the folder as an email: the **<InfoRef...>** folder reference is mentioned in the email subject. He/She prepares his/her reply and sends it via his/her mailbox.

The expert never replies directly to the contact; he/she communicates exclusively with the contact centre agents or supervisors. As soon as the expert reply is received, ALE Connect changes the status of the folder to **Expert reply**. You can then continue to process the process.

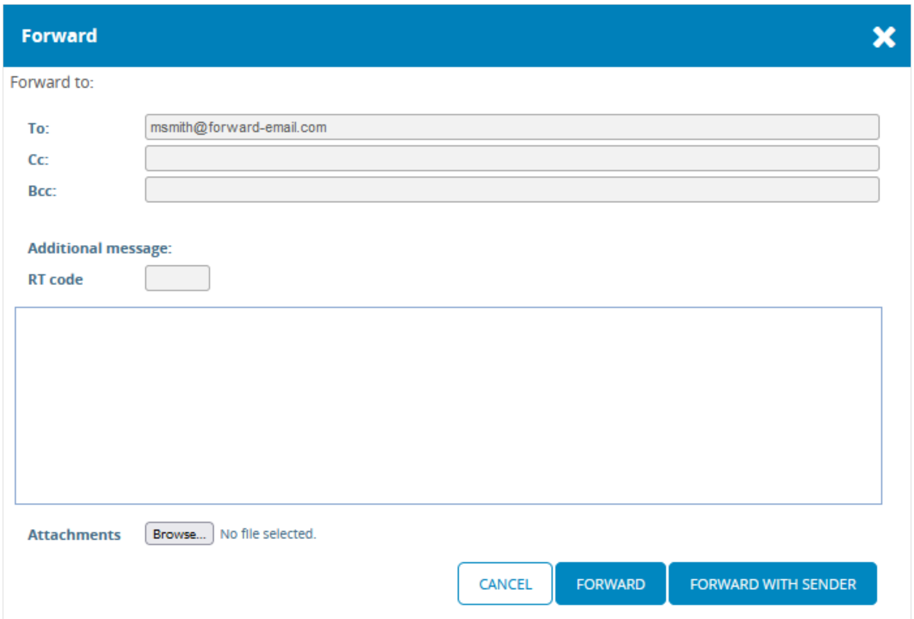
9.14.5 Forwarding a folder

This functionality allows you to delegate the management of a folder, for email media only, to the recipients of your choice (other company department, external organisation, etc.). These recipients will be in charge of resuming its processing with their own tools. For example, a web user has sent an email due to an invoicing error on his/her order. This folder has to be forwarded to the accounting department for correction.

The major difference with redirection actions is that this operation closes the folder permanently in ALE Connect. It is considered to be out of the system: the folder changes to the Closed (Forward) status, and then is stored in the Processed desktop. In other words, after forwarding, all new events of the folder are not visible in ALE Connect.

Warning: this action is only displayed if you are allowed to forward folders of the affected queue (right assigned by the coordinator and valid for the user group to which you belong).

1. Click the **List of folders** button ().
2. If necessary, perform a folder search.
3. Open the email folder affected.
4. In the **External** menu, click **Forward**.
5. The following screen is displayed:



6. Fill in the email addresses of the recipients of the folder, those of the persons in copy (**Cc**) and in blind copy (**Bcc**).
7. Write the message to the recipients, either by entering it directly, or by inserting a response template by entering its **RT code**.

   Warning: only response templates of “response” type (created by the coordinator) can be used here. Those of “message” type are exclusively reserved to process chat and Facebook Messenger conversations.

   If necessary, you can attach documents with the forwarded folder.

8. Then click:

   Forward: to send the folder to the recipients, without the contact who performed the request being informed.

   Forward with sender: to send the folder to the recipients. The response will be sent directly to the contact who performed the request.

   ALE Connect then closes the folder and the corresponding tab.

9.14.6 Changing the priority of a folder

The priority determines the urgency of processing a folder. For this purpose, there are 5 levels of priority: 1 is the most urgent level, 5 the least urgent.

A priority is automatically assigned to the folder when it is created. However, for email folders, you have the possibility to change it manually in order to speed up the handling. For agents who work in push mode, the folder will then be distributed more or less quickly depending on the new priority assigned.

Note: changing the priority does not impact the status of the folder.

9.14.6.1 The 5 levels of priority

The priority of a folder is important: the higher the priority, the more access ALE Connect will provide to the folder; the objective being that it is processed as quickly as possible by making it accessible to a maximum number of agents. In other words, the higher the priority, the more ALE Connect makes the folder visible to agents regardless of the rights set up at agent group level (skills and languages).

- **Priority 1** is the highest level: at this stage, it is considered urgent to process the folder. That is why a priority 1 folder is visible and accessible to any agent who has rights on the queue of the folder (read or read/write). Priority 1 folders are also always displayed when filtering on skills or languages regardless of the criteria checked.
- **Priority 2** folder is visible and accessible to any agent who has rights on the queue (read or read/write) AND the language of the folder. Priority 2 folders are also always displayed when filtering on skills regardless of the criteria checked.
- **Priority 3, 4 or 5** folder is visible and accessible to any agent who has rights on the queue (read or read/write) AND the language AND the skill of the folder. The difference between the priorities is simply used to define a hierarchy of folders for processing.

9.14.6.2 How is the priority assigned?

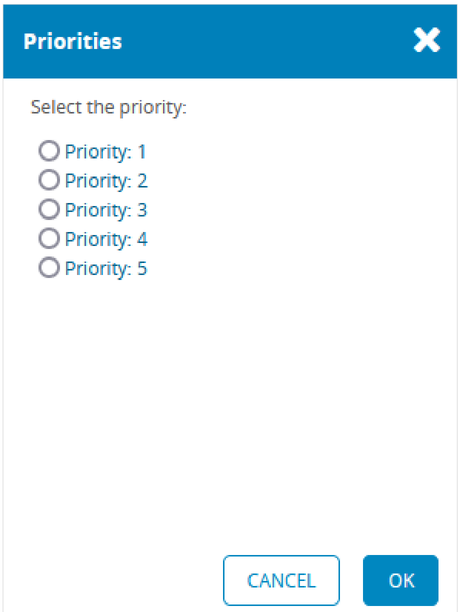
By default, any new folder is automatically initialised with **priority 5**.

However, depending on the parameters in ALE Connect and the media managed, the priority of a folder can be automatically initialised with a specific value: indeed, if the folder is of email, Twitter or Facebook Messenger media, a routing rule may assign it a particular priority when it arrives in ALE Connect.

9.14.6.3 Procedure

1. Click the **List of folders** button (📁).
2. If necessary, perform a folder search.
3. Open the email folder affected.
4. In the **Internal** menu, click **Other priority**.

   The following window is displayed:



5. Check the new priority of the folder.
6. Click **OK** to save your choice.

   ALE Connect updates immediately the priority of the folder and closes the corresponding tab.

9.14.7 Closing a folder

This functionality allows to close manually a folder in progress, when you consider it has been processed (usually by another way than ALE Connect). The folder changes to the **Closed** status, and then is stored in the **Processed** desktop (where it may be reactivated if necessary). For example, a contact sent an email requesting an invoice for his/her purchase: the accounting department generated it with its own software and sent it by letter.

Unlike most unit actions, it is not possible to close several folders at the same time via a grouped action.

Warning: any closed folder is taken into account in the calculation of the Quality of Service. This is the only difference with archiving.

1. Click the **List of folders** button (📁).
2. If necessary, perform a folder search.
3. Open the folder in progress by clicking the corresponding line: its detailed information is displayed on your screen.
4. From the **Folder** tab, click **Close**.

   If the qualification of the folder has not been performed yet, the qualification criteria are displayed.
5. Check the **criteria** matching the folder.

   According to the setup, a minimum and/or maximum number of criteria may be required: this rule is specified on top of the screen.
6. Click **OK** to confirm your choice, or **Cancel** to abandon this action.

   ALE Connect closes immediately the folder, and then the corresponding tab.

9.14.8 Archiving a folder

This function allows you to close manually one or several folders in progress: you consider the folder has been processed in one way or another. It changes to the **Archived** status, and then is stored in the **Processed** desktop (where it may be reactivated if necessary).

Warning: an archived folder is **not** taken into account in the calculation of the Quality of Service, unlike a closed folder.

9.14.8.1 Single folder

1. Click the **List of folders** button (📁).
2. If necessary, perform a folder search.
3. Open the folder in progress by clicking the corresponding line: its detailed information is displayed on your screen.
4. From the **Folder** tab, click **Archive**.

   If the qualification of the folder has not been performed yet, the qualification criteria are displayed.
5. Check the **criteria** matching the folder.

   According to the setup, a minimum and/or maximum number of criteria may be required: this rule is specified on top of the screen.
6. Click **OK** to confirm your choice, or **Cancel** to abandon this action.

   ALE Connect archives immediately the folder, and then closes the corresponding tab.

9.14.8.2 Group of folders

1. Click the **List of folders** button (📁).
2. If necessary, perform a folder search.
3. Check the folders to archive.
4. Click the **Group** button (🗂).
5. Select the **Archive** grouped action.

   ALE Connect archives immediately the folders.

9.14.9 Freeing a folder

This action allows you to remove the assignment of a specific agent to one or several current folders. The agent's name is then removed and dashes appear in the corresponding column from the list of folders. Freeing a folder has no impact on it (in terms of deadline, priority, etc.).

9.14.9.1 Single folder

1. Click the **List of folders** button (■).
2. If necessary, perform a folder search.
3. Open the folder in progress by clicking the corresponding line: its detailed information is displayed on your screen.
4. From the **Folder** tab, click **Free**.

   ALE Connect frees the folder, and then closes the corresponding tab.

9.14.9.2 Group of folders

This action allows you to free several folders at the same time, whether they are all assigned to the same agent or not.

Warning: this grouped action is available only if the selected folders all belong to the same queue.

1. Click the **List of folders** button (■).
2. If necessary, perform a folder search.
3. Check the folders to free.
4. Click the **Group** button (■).
5. Select the **Free** grouped action.

   ALE Connect frees immediately the selected folders.

9.14.10 Reserving a folder

You have the possibility to assign one or several current folders to yourself, to support them. After reserving, your name is displayed in the corresponding column from the list of folders. This action has no impact on the affected folder (in terms of deadline, priority, etc.).

9.14.10.1 Single folder

1. Click the **List of folders** button (■).
2. If necessary, perform a folder search.
3. Open the folder in progress by clicking the corresponding line: its detailed information is displayed on your screen.
4. From the **Folder** tab, click **Reserve**.
   ALE Connect immediately assigns you the folder, and then closes the corresponding tab.

9.14.10.2 Group of folders

This action allows you to reserve several folders at the same time, even if they are already assigned to other agents.

Warning: this grouped action is available only if the selected folders all belong to the same queue.

1. Click the **List of folders** button (■).
2. If necessary, perform a folder search.
3. Check the folders to be reserved.
4. Click the **Group** button (■).
5. Select the **Reserve** grouped action.

   ALE Connect immediately assigns you the selected folders.

9.14.11 Duplicating a folder

This action is available only in a specific case: when the contact sends at least two successive replies related to his/her folder (reminder), without any intermediate message from an agent. It is then possible to duplicate the existing folder to create another one. The objective is to process the messages sent separately when they are separate requests.

ALE Connect then generates a new folder to be processed with a deadline initialised to 0: it has the same queue, language, skill and priority as the duplicate folder.

1. Click the **List of folders** button (🗀).
2. If necessary, perform a folder search.
3. Open the folder in progress by clicking the corresponding line: its detailed information is displayed on your screen.
4. From the **Folder** tab, click **New folder**.

   ALE Connect generates a new folder in the In progress desktop.

9.14.12 Reactivating a folder

This individual action allows to resume a specific folder in order to re-process it when, for example, a new event has occurred. You can reactivate any folder, regardless of its media, that is located in one of the following desktops:

- **Processed**: the folder returns to the In Progress desktop and can again be supported by an agent.
- **Recycle bin**: the folder returns to the desktop where it was initially stored before being moved to the recycle bin (In progress, Processed or Validation). Voice, Chat and Facebook Messenger folders can be reactivated only from this desktop.

After reactivating, the folder remains displayed on screen in read/write mode so that you can resume it.

Warning: when a folder is reactivated, its processing deadline is automatically reset to 0. In addition, it is not assigned to any agent.

1. Click the **List of folders** button (📁) in the taskbar.
2. Select the desktop in which the folder to reactivate is stored.

   If you do not know, perform a folder search.
3. Click the folder to be reactivated: its content is displayed on the screen.
4. Click the **Reactivate** button.

   ALE Connect reactivates the folder and stores it in the affected desktop. The folder remains opened on the screen in read/write mode so that you can resume it.

10 Contacts

A contact is a person or an entity (such as a company for example) with whom/which an agent can interact in ALE Connect by using the various media available.

Any interaction is mandatorily associated with a contact, already identified or anonymous.

For this purpose, ALE Connect provides you with a contact database that you can use and enrich as your activity grows, to link them to the processed interactions. It can be fed in two ways: either by creating a sheet (new folder for example), or by importing a contact file. This second operation can only be performed by the platform coordinator.

Contact management includes the following functionalities:

- Create, modify or view a contact sheet;
- Search a contact in the database;
- View the history of his/her folders;
- Merge several contacts.

10.1 Creating a contact sheet

In most cases, you do not need to create the sheet: ALE Connect automatically generates it as soon as you close a folder for which no contact has been associated with. ALE Connect then creates the sheet by retrieving the available information (ex: caller's phone number).

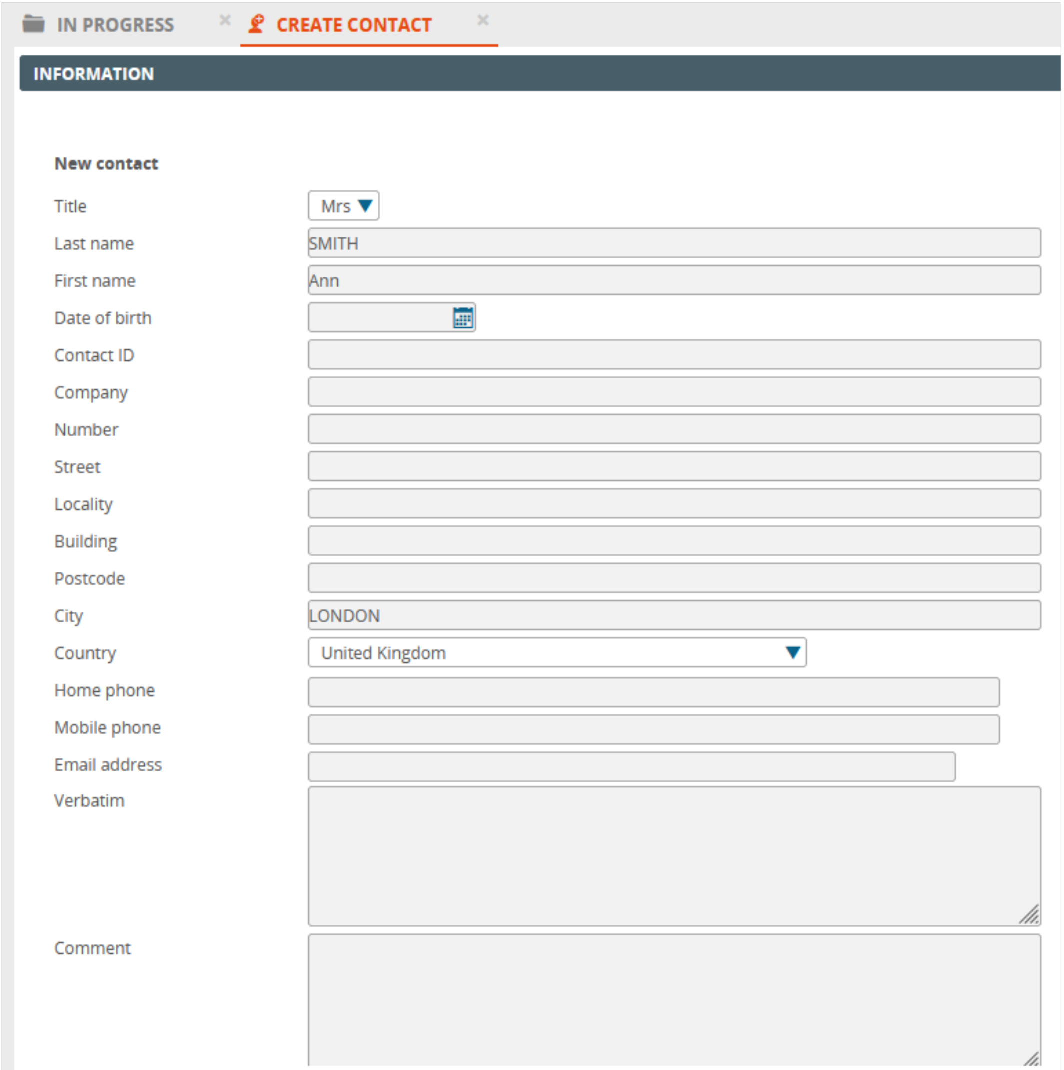
Nevertheless, you may need to create a sheet manually (often out of necessity, when processing a folder). For this purpose, ALE Connect provides a default sheet. If desired and if configured by a coordinator, its form can be customised according to the needs of the contact centre, the customer profiles and the activity. Please note that the explanations of this section describe only the fields and entry rules of the default sheet.

Warning: once created in the database, a contact can no longer be deleted. However, you can modify his/her sheet or merge it with another one, in case of errors.

10.1.1 Out of a folder

This action is independent from your current tasks. It allows to create a contact, without performing a prior search. This method is recommended when you are sure that the contact does not exist in the database and you want to create it independently of a folder.

1. Click the **Create a contact** button ( ) from the taskbar.
2. A new tab is displayed in your workspace:



The sheet is divided into two parts: on the left, the contact's **personal information**; on the right, the **history of his/her folders** (empty in creation mode).

3. Fill in the following fields:

Title (mandatory)
Select, from the choice list, the title of the contact. By default, this is Mr. The choice list is predefined in the system and cannot be changed.

Last name
Enter the last name of the contact.

First name
Enter the first name(s) of the contact. After entry, an unaccented capital letter is automatically applied to the first letter of the first name. In case of compound first names, the hyphen “-” and the space are considered as separators between the different parts.
Ex 1: “marie” becomes "Marie"
Ex 2: “jean-paul” becomes "Jean-Paul"
Ex 3: “marie éloïse” becomes "Marie Eloïse"

Date of birth
Enter the contact’s date of birth, in DD/MM/YYYYY format, either by entering it directly or by selecting it from the calendar.

Contact ID
You can associate another ID with the contact, in addition to the one automatically assigned by ALE Connect. For example, the contact ID from the CRM software used by the company.

Company
Fill in the company name, when the contact works for a company.

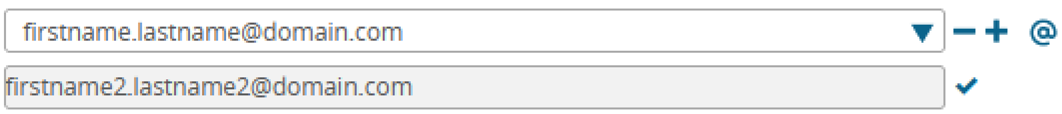
Number/Street/Locality/Building
Enter the postal address of the contact, filling in the required fields.

Postcode/City
Enter the postcode and the city where the contact lives. ALE Connect does not control the consistency between the code and the city entered.

Country
Select, from the choice list, the country where the contact lives. It is inherited from the system.

Home phone/Mobile phone
Enter the phone numbers of the contact.

Email address
ALE Connect allows to enter as many email addresses as needed. To add one, click the [+] button located to the right of the field. An entry area is displayed below: enter the email address and validate it by clicking the Add icon. If the contact has more than one, the email address selected by default will be used when processing interactions. On the contrary, it is possible to delete a selected email address by clicking the [-] button.



Warning: the Send email button is only displayed if the ALE Connect license includes the Email media.

Facebook alias
Enter the contact’s Facebook alias, if he/she owns a Facebook account.

Verbatim
A verbatim is a written report, word by word. In this field you can enter any information about the contact that is required.

Comment
This field allows you to enter a second comment if necessary.

4. Click **OK** to save the sheet.

   ALE Connect adds the contact in the database and assigns a unique number: this is the contact ID. This number is immediately visible, at the top of the sheet: The sheet can now be modified or viewed at any time, depending on the activity. Each interaction associated with this contact will be systematically saved in his/her history of folders.

10.1.2 During the processing of a folder

At any time, it is possible to manually create a contact sheet during the processing of a folder, even during the wrap-up time. Some fields may be pre-filled in if they have been retrieved automatically (ex: from a search or from data in a structured email).

Warning: if the contact information is not saved before the end of the wrap-up period, it will be lost and will NOT appear in the folder once classified in the Processed desktop.

1. While processing a folder, click the Contact tab.
2. Click the **Create a contact** button ().

3. Fill in the information in the contact sheet.
4. Click the **OK** button.

   The contact sheet is created: you can now modify it or associate it with the interaction being processed, by clicking the corresponding tab.

10.1.3 By creating a folder simultaneously

You need to create a folder for a new contact, as this is a first interaction (ex: following the receipt of a letter).

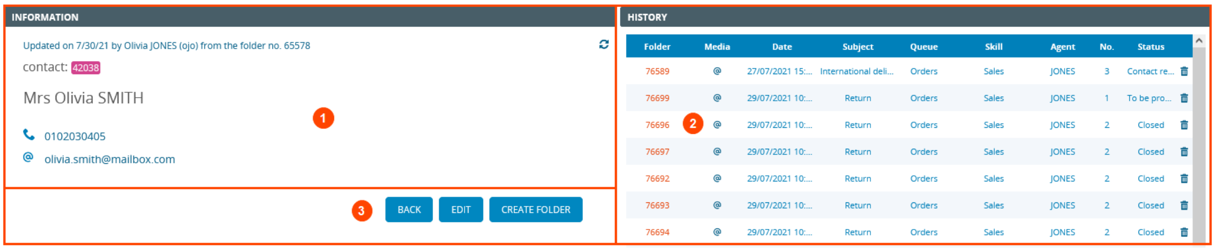
1. Click the **Create a folder** button () in the taskbar.
2. A mixed form is displayed: it allows you to create both the folder and the contact sheet.

10.2 Viewing a contact sheet

Once the contacts created in the database, you can view a sheet at any time. This action is useful when you need to contact the person, or to check an information without changing his sheet.

10.2.1 Out of a folder

1. Click the **Search a contact** button ( ) in the taskbar.
2. Enter the search criteria.
3. Click the **OK** button or press the **Enter** key.
   ALE Connect displays the list of contacts matching your search on the right side of the screen.
4. Once the contact found, click the corresponding line.
5. ALE Connect displays her/his sheet in read-only mode on the screen:



The **left part** (1) of the sheet presents the contact's personal information; the **right part** (2) the history of his/her folders.

If the sheet is the result of a contact merge, the numbers of merged sheets are specified as comments.

You can call the contact ( ) or send him/her a spontaneous email ( ) by clicking the corresponding icon.

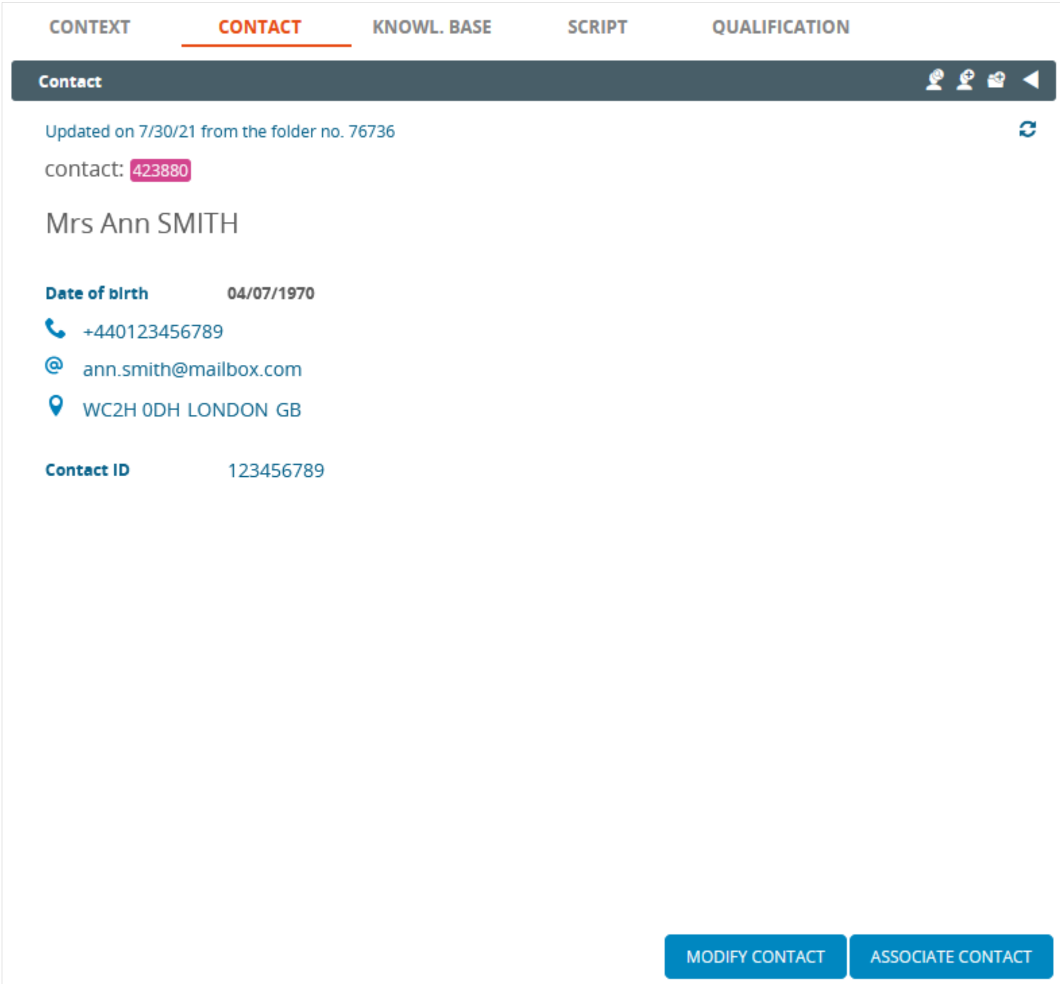
> **Warning:** these actions are only available if the media included in the ALE Connect license allow it.

Buttons (3) are located at the bottom of the screen:

- **Back** allows you to go back to the search criteria screen.
- **Edit** allows you to modify the contact sheet.
- **Create** folder allows you to create a folder for a contact.
- **Contact calendar** allows you to create a task for the contact.

10.2.2 During the processing of a folder

1. While processing a folder, click the Contact tab.
2. ALE Connect displays the contact's personal information, extracted from his/her sheet.



10.3 Modifying a contact sheet

This action is possible at any time: before, during or after the processing of an interaction, whatever its media. However, the access modes will vary according to your current task.

10.3.1 Out of a folder

This procedure can be performed at any time, whether you are processing an interaction or not. It is fully independent from the rest of your tasks.

1. Click the **Search a contact** button ( ) in the taskbar.
2. Enter the search criteria.
3. Click the **OK** button or press the **Enter** key.

   ALE Connect displays the list of matching results on the right of the screen.
4. Once the contact found, click the corresponding line.

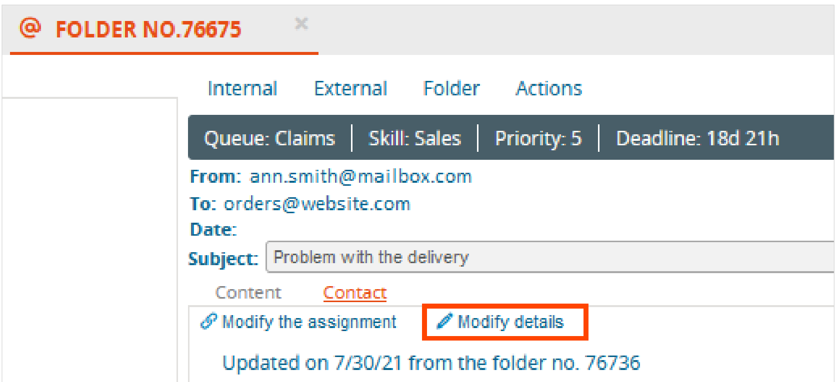
   The last update date and time of the sheet are indicated, as well as the agent who performed the changes. This information may be useful when you need information or have questions to ask this agent.
5. Click the **Edit** button: the contact sheet is opened.
6. Modify the desired data by respecting the entry rules.
7. Click **Save**.

10.3.2 During the processing of an email folder

At any time, it is possible to modify a contact sheet during the processing of a folder, even during the wrap-up time. The contact is already associated with the folder.

Warning: if the contact information is not saved before the end of the wrap-up period, it will be lost and will NOT appear in the folder once classified in the Processed desktop.

1. While processing a folder, click the Contact tab.
2. Click the **Modify details** option ( ).

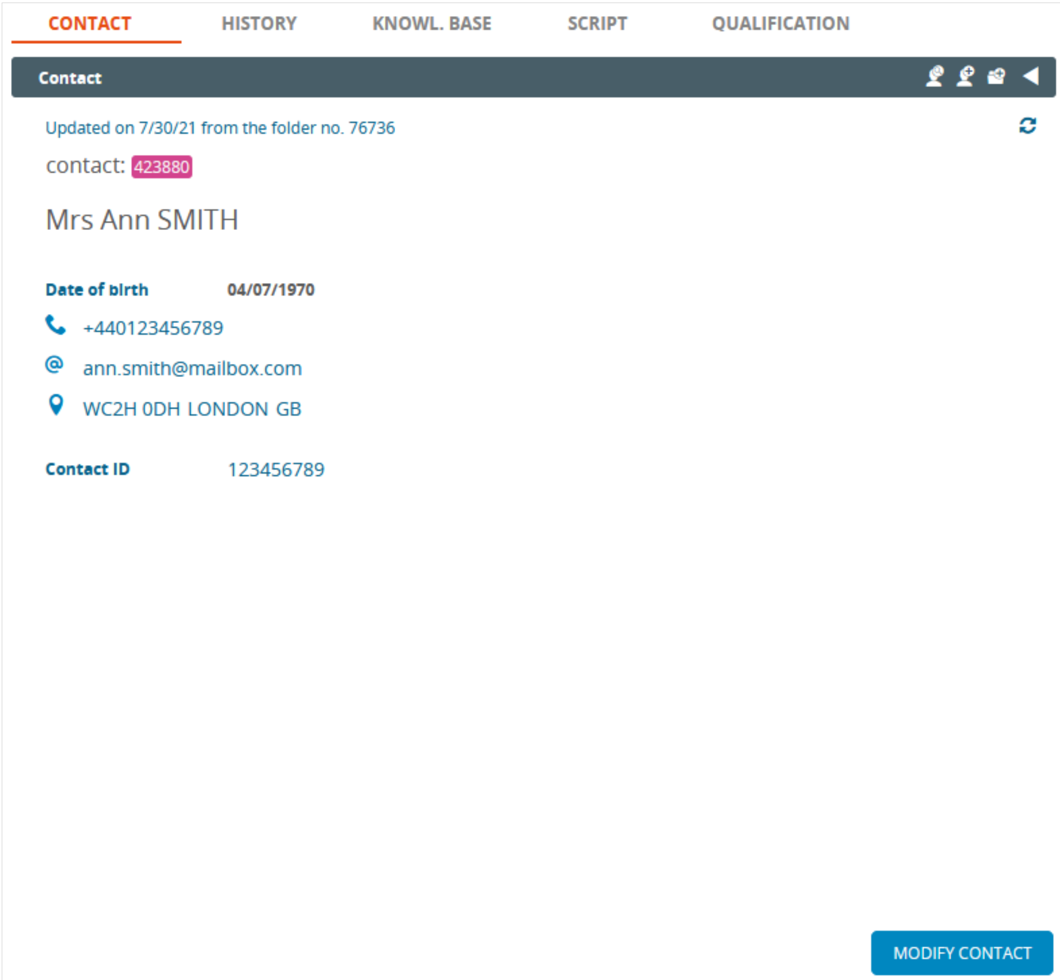


3. Modify the desired fields.
4. Click the **OK** button.

10.3.3 When processing a folder from another media

As mentioned for the processing of an email folder, the contact information must be saved to appear in the folder once processed.

1. While processing a folder, click the Contact tab.
2. Click the **Modify contact** button.



3. Modify the desired fields.
4. Click the **OK** button.

10.4 Searching a contact

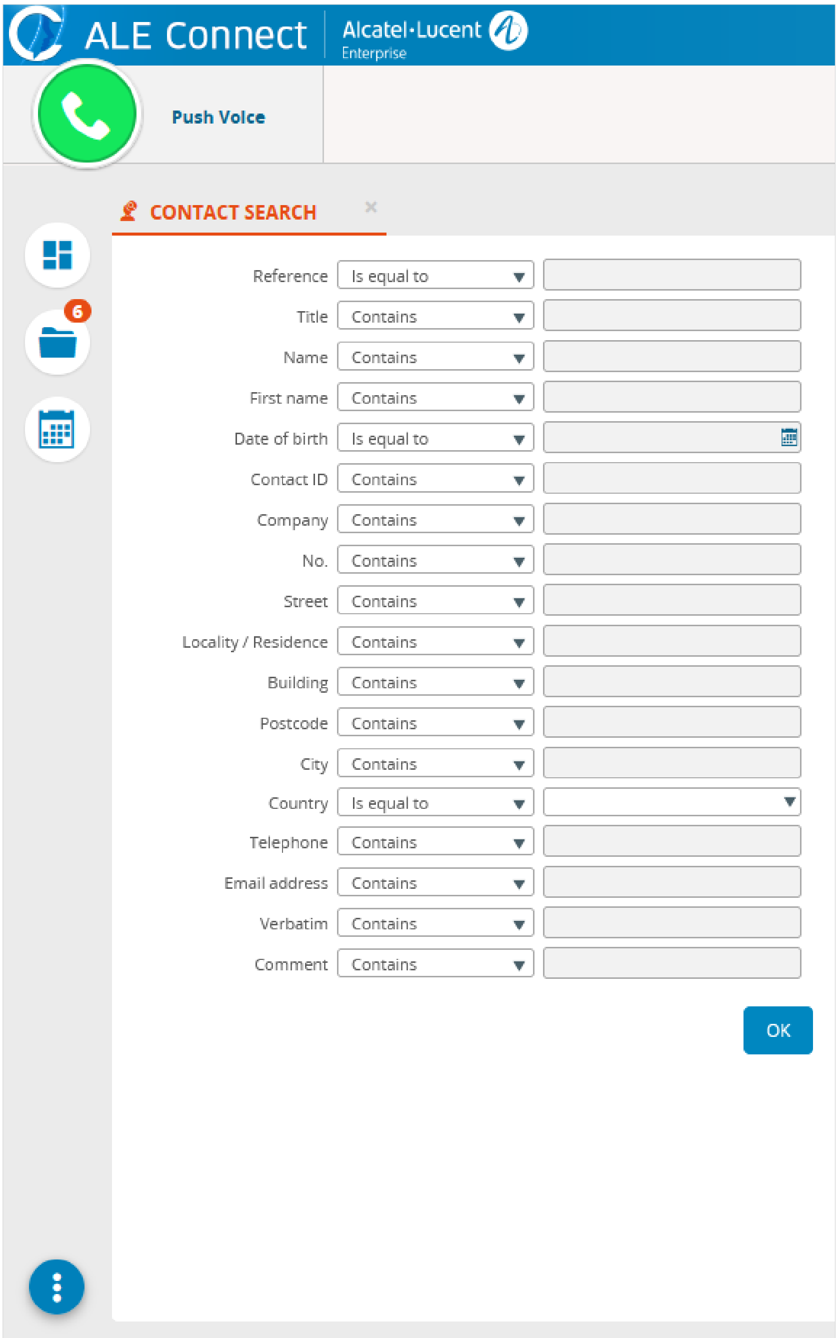
This essential action is easily accessible from many of ALE Connect functionalities, to make your work easier.

10.4.1 Out of an interaction

With ALE Connect, you can search contacts at any time independently of your current tasks.

1. Click the **Search a contact** button ( ) in the taskbar.

   A new tab is opened:



2. Enter the desired search criteria.

   The **available criteria** are all the fields of the contact sheet. The search can be performed on one or more fields according to your needs. For each criterion to use, choose a mathematical operator from the list (Contains, Is equal to, etc.) and then enter the desired value.

   Ex: you want to search all the contacts who live in Paris. In the CP field, select the *Starts with* operator then enter the value 75.

   This **selection is optional**: to display the list of all contacts from the database, click directly the OK button, without entering any information.

3. Click the **OK** button or press the **Enter** key.

   The matching results are displayed on the right of the screen, when at least one contact has been found. Otherwise, the list is empty. By default, the contacts are sorted by ID in descending order. However, you can re-sort the list according to the criteria of your choice, by clicking the desired column header (ex: by last name).

Ref.	Name	First Name	Origin	Update	Master/Ch
423962	SMITH	Ann		16/08/2021	
423903	CONNOR	Olivia		16/08/2021	
423889	BROWN	Oliver		16/08/2021	
423880	SMITH	Ann	ann.smith@mailbox.com	30/07/2021	
423879	CONNOR	Jack		16/08/2021	
423878	KYLE	Harry		28/07/2021	
423873	WILLIAMS	Margaret	m.williams@mailbox.com	28/07/2021	
423871	EVANS	Victoria		28/07/2021	
42038	SMITH	Olivia	olivia.smith@mailbox.com	30/07/2021	

9 items/ Page 1/1

For each contact found, you can view his/her ID, Facebook profile picture (if available), name, first name, main email address (if filled in), the last update date of the sheet, and two Parent/Child options that allow to merge contact sheets.

10.4.2 During the processing of a folder

The contact search is also accessible within a folder.

1. While processing a folder, click the Contact tab.
2. Click the **Search a contact** button ().
3. Follow the standard search procedure.

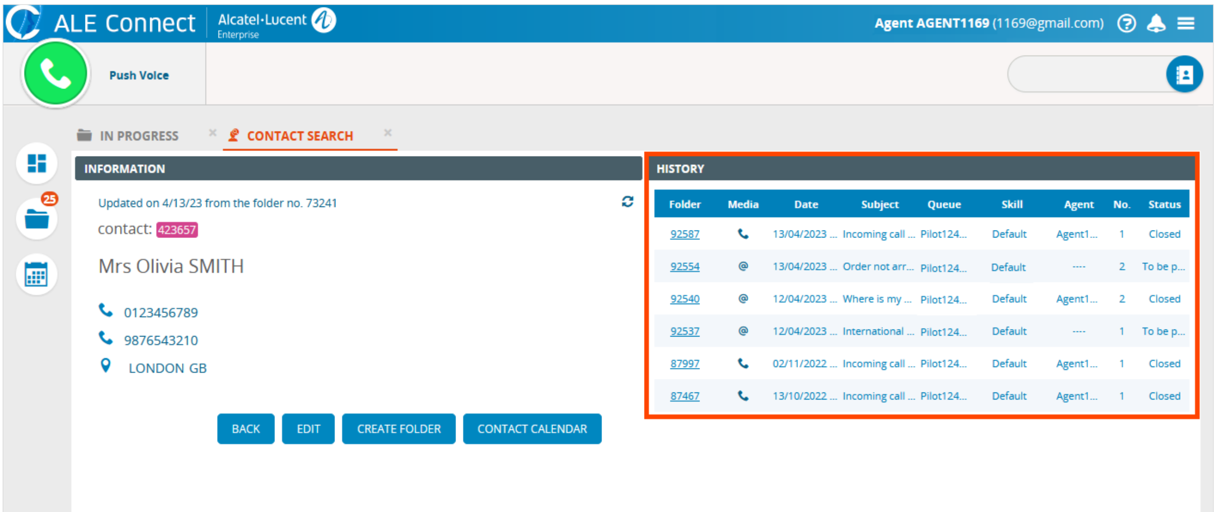
10.5 Viewing the contact history

At any time, you have the possibility to launch a contact search; whatever your current tasks in ALE Connect. As soon as you view a sheet in the results, you have access to the history of the contact folders. The main advantage of this history is to be more complete than the one displayed during the processing of a folder. It is particularly useful when you need to search a folder that you have not been involved in.

Warning: you can view all the contact's folders in the history, whatever your rights. However, if you do not have the right to view the detailed content of a folder, a message informs you when you click its number.

1. Click the **Search a contact** button ( ) in the taskbar.
2. Enter the search criteria.
3. Click **OK** or press the **Enter** key.
4. From the list of results obtained, click the corresponding contact.

   His/Her history is displayed on the right side of the screen:



You can view all the contact's folders, sorted from the most recent to the oldest according to the processing date of the folder (field not visible on the interface).

For each of them, you can view the following information:

Folder
Unique folder number on which you can click to access its detailed content. A message is displayed if you do not have the right to read it.

Media
Icon illustrating the media associated with the folder. In case of an email, hover over the @ icon to view the sender's email address.

Date
Creation date and time of the folder.

Subject
Subject of the folder which may vary according to the media associated.
Email: message entered by the sender.
Voice: default description indicating the correspondent’s phone number (can be modified when processing the folder).
Chat: default description indicating the web user’s surname (can be modified when processing the folder).
Facebook Messenger: Facebook page ID followed by the user's identity on Facebook.
Twitter: "Twitter - " reference followed by the Twitter account to which the contact wrote.
If no subject has been specified, the column displays a series of dashes.

Queue
Name of the queue in which this folder has been directed.

Skill
Name of the skill associated with the queue and therefore with the folder. Skill is an ability that allows the assignment and processing of a folder by an agent.

Agent
Last name of the agent who processed the folder. In case of an email with several exchanges, this is the name of the last agent who replied.

No.
Total number of exchanges between the agent and the contact, for the current folder. Each time there is an exchange resulting in an incoming or outgoing email, ALE Connect increases this number by 1. Acknowledgements of receipt are also counted.

Status
This is the current status of the folder (ex: In progress, Reminder, Closed, etc.).

Move to the Recycle Bin
This button is only displayed if you are supervisor (it is hidden from agents). It allows you to move the current folder to the recycle bin whatever its media (voice, chat, etc.) to delete it permanently.

10.6 Merging contacts

It may happen that the same contact has several sheets in the system. For example, his/her last name was misspelled by an agent when supporting an interaction. These sheets are called duplicates.

Merging consists in keeping a single contact sheet of your choice, called parent, by removing one or more other existing sheets, called child. ALE Connect performs a “logical” deletion of the merged contact sheets: this means that they will be hidden and will no longer be taken into account by the processings on the agent interface (whatever the action performed). This is not a physical deletion: the duplicate sheets are still present in the database.

Once performed, the merge is traced in the comment of the parent contact sheet: this one reminds the numbers of merged sheets, the date when the merge was performed and the user who performed the action. Folders associated with the child contact sheets are not associated with the agent who performed the action. The parent contact sheet inherits not only the folders of the child sheets, but also the social identities, i.e. the public data from social media (Facebook Messenger and Twitter): profile’s picture, last name, first name, gender, etc.

When the merge is performed while processing an incoming call, ALE Connect displays all the contacts whose phone number matches the caller’s phone number.

Warning: it is not possible to go back and cancel a merge.

10.6.1 Why remove duplicates?

Duplicate management is essential, because misidentification of contacts can quickly damage the centre's activity:

- Agent time wasted in searching when supporting an interaction,
- Errors when processing a folder,
- Poor quality of data collected,
- Costs increased when sending emails,
- Damage to the company’s brand image with its customers,
- Memory space occupied unnecessarily in the system,
- Etc.

10.6.2 Procedure

1. Click the **Search a contact** button () in the taskbar.
2. Enter the desired search criteria.
3. Click **OK** or press the **Enter** key.
4. From the list of results obtained, check the **Parent** option matching the contact sheet to keep.
5. Check the **Child** option for all the duplicates to remove.
6. Click the **Merge the selection** button () below the list.

   ALE Connect performs the merge: only the parent contact sheet remains accessible. However, the child folders are no longer accessible.

10.7 Special case: deleting a contact

It is not possible to delete a contact, once created. In case of error(s), we invite you to contact your supervisor to find out how to correct them.

As agent, you can modify the sheet by correcting the wrong information, or merge it with another sheet (that is correct).

Only ALE Connect system administrators are authorised to perform a mass deletion of contacts, by executing a technical purge processing (job) from their administration interface.

11 More help

11.1 Glossary

A

Acknowledgement of receipt: automatic email sent by ALE Connect to a contact, confirming the receipt of his/her message and usually indicating an informative processing deadline.

Address book: list of persons internal or external to the company with whom the agents may communicate when processing folders, whether to obtain additional information before replying to a contact, or copy them for example.

Agent: also known as advisor, he or she is responsible for processing requests performed from contacts, whatever the media used: phone call, email or chat. He/She belongs to a group of agents and shares the same rights as them.

Aggregation: in reporting, process which consists in cumulating values to get a single value that will be used. Usually, values are aggregated over a given period (week, month or year for example) or a geographical area (region, country, continent, etc.).

ALE Connect application freeze: temporary blocking of the ALE Connect interface, when the agent has ignored several successive pop-up notifying the arrival of an interaction. This mechanism is intended to temporarily suspend the distribution of emails and chats.

Animated GIF: GIF (Graphics Interchange Format) is an image format frequently used on the Web. An animated GIF is a variant: this GIF file consists of a series of ordered images, displayed very quickly in a loop, thus allowing to obtain a short animation. Usually comical or parodic, they are used to illustrate a situation, a thought or an emotion. They can be used in Facebook Messenger conversations between an agent and a web user.

API: Application Programming Interface that allows applications to exchange data with each other. ALE Connect provides a library of API to exchange data with any third party application (usually a CRM software).

B

Business unit: sub-division of the tenant. The business unit is a set of queues with its own knowledge base.

C

Chat: instant messaging that allows contact centre agents to chat with web users in real time.

Contact: person (customer or not) who initiates an exchange with the contact centre. This exchange can be performed by email, telephone, chat, etc. Each contact is identified by an individual sheet in the software.

Coordinator: this user accesses to only one tenant and some extensions (advanced routing for example). The coordinator role is usually reserved to the Business Partner in charge of the configuration of the ALE Connect tenant.

Cube: in BI, abstract representation of multidimensional information that is exclusively digital, based on the OLAP (On-line Analytical Processing) approach. A cube is based on a relational database built in a structured way and organised by business axis to allow simple access (DataMart). This method is offered for interactive analysis purposes by one or more persons (often computer and statistical novices) whose job is represented by the data.

D

Dashboard: dashboard displaying Key Performance Indicators (KPIs) that measure trends and performance of contact centre activity, either in real time or historically for the current day.

Desktop: working directory presenting a list of folders, as a mailbox, all media included.

Dimension: in a statistical report, business axis you wish to analyse (e.g. media, agents, calls, etc.). The dimensions are specific to each cube and can be used as filters. A report can contain several dimensions.

Drill-through: in a statistical report, computer action allowing you to zoom in on the finest level of information by a single click, from aggregated data.

E

No entry in the glossary.

F

Facebook Messenger: instant messaging system provided by the social network Facebook.
ALE Connect allows contact centre agents to process requests performed by web users through this media.

Folder: request from a contact that includes the various exchanges and processings related to this request, whatever the media used to initiate it.

Form: set of fields allowing to store metadata related to an interaction in the ALE Connect tables. This data is usually extracted from emails, voice scenarios (for voice) or context data (chat).

G

No entry in the glossary.

H

Handling time: measure used to evaluate the time spent by an agent to process a folder.

I

No entry in the glossary.

J

No entry in the glossary.

K

Knowledge base: library of shared elements facilitating the processing of folders by the agents. It contains response templates, among other things. Any agent can thus use the knowledge base when processing folders.

KPI: acronym for Key Performance Indicator. Key performance indicator also called counter in ALE Connect. In a statistical context, numerical value used to measure the performance of the contact centre. ALE Connect natively includes a wide range of key indicators to feed the dashboards or D+ reports.

L

No entry in the glossary.

M

Measure: numerical indicator representing a number, duration or percentage. It is also called KPI (Key Performance Indicator). It evaluates the trend, positive or negative, at a given moment, according to the object measured. A measure can be aggregated, i.e. cumulated over one or several dimensions such as a time unit: by day, by week, by month, etc.

N

No entry in the glossary.

O

Operational status: status indicating in real time what the agent or supervisor is doing, while communicating its availability to other logged in agents/supervisors. On the ALE Connect interface, it is represented by a round icon and a description specifying the task performed.

P

Picking: random sampling of messages written by agents. It is requested by the supervisor in order to check the content for qualitative or training purposes.

Pull mode: working method that allows the agent to freely select the interaction to be processed from one of the available desktops (email or Facebook Messenger conversation for example).

Purge: computer process to permanently delete data from a system. This processing is generally recommended when it is necessary to delete obsolete data, reduce the database volume (in particular when the system has been used for several years), optimise performance (handling times being mechanically reduced by the deletion of data) or respect legal constraints (ex: CNIL standards in France related to the storage of personal data).

Push mode: working method that consists in automatically submitting to an agent any new interaction that arrives (call, chat, etc.) without the agent having to do anything. The software "pushes" the interaction. A pop-up is displayed in the lower right corner of the screen to notify this arrival.

Q

Quality of Service: QoS. Ability of the centre to respond to requests from contacts, all media included. It evaluates satisfaction in terms of response according to different criteria: responsiveness, handling time of folders, etc. It can be calculated over a day or a longer period depending on the need. Different calculation methods are available in ALE Connect. The higher the quality of service, the better the customer service.

Queue: set of folders from the same media. A queue mandatorily depends on a business unit.

R

Realtime queue: queue to which a language and a skill has been assigned. It automatically inherits from the media of the queue to which it is linked.

Report: statistics table with one or several rows and/or columns, depending on the case, presenting the results according to the chosen dimensions, measures and filters.

Response template: pre-formatted written message that agents and supervisors can use when processing a folder. Its insertion avoids entry errors, reduces handling time, and allows frequently asked questions to be answered. Response templates are particularly useful to process emails and chats with the web users.

S

Skill: professional ability or know-how required to process a folder. A skill is always assigned to a new folder (as well as a queue and a language).

Spontaneous email: email sent by an agent/supervisor, for which there was no prior request from the contact.

Supervisor: in a contact centre, the supervisor is in charge of one or several groups of agents. He/She often combines the roles of agent and supervisor. As an operational person, he/she manages the activity and supports the agents he/she supervises in their daily tasks. He/She accesses the administration interface where he/she can, among other things, see the queues he/she supervises, manage the knowledge base and his/her user groups.

T

No entry in the glossary.

U

No entry in the glossary.

V

No entry in the glossary.

W

Wallboard: dashboard whose ergonomics and display are adapted to remote reading, on large screens. It is used as a visual communication tool for teams grouped in the same open space, which can thus follow up the evolution of the activity in real time.

Widget: web interface complementary to ALE Connect which offers to web users to be connected to the contact centre. Integrated into the page(s) of the company's website, two services are available: chat (a web user can chat with an agent) and/or Web Call back (a web user can enter his/her phone number in order to be called back to be connected with an agent).

Wrap-up: when the interaction is over (call, chat, etc.), time remaining for the agent to complete the folder. This time can be set up by the ALE Connect coordinator.

X

No entry in the glossary.

Y

No entry in the glossary.

Z

No entry in the glossary.

11.2 Frequently asked questions (FAQ)

Below you will find answers to the most frequently asked questions about ALE Connect.

11.2.1 User accounts

An agent has left the company. What action(s) should I do?
Start by deactivating the account, by entering an expiry end date in his/her user sheet, to prevent any login to ALE Connect with this account. Deactivation does not result in the deletion of any data (folders, statistics, etc.). In addition, you will have the possibility to reactivate the account later if, for example, you work with occasional/seasonal providers.

Move the affected user to an obsolete user group: we invite you to contact your customer support, to study the possibilities of implementation.

The statistical reports and dashboards need to be updated. Each customised report using lists of values filtered on agents or logins must be modified by its owner: the agent must be removed from these filters. Otherwise, if a programming exists for this report, its sending by email will fail. In addition, all the dashboards that contain list widgets in which the agent appears must also be updated manually.

A supervisor has left the company. What action(s) should I do?
Perform the actions described in the previous answer. Then:

The supervisor must be removed from the list of recipients for all programmings of statistical/picking reports. Please note that only the creator of a programming is authorised to modify it. If this is not done, ALE Connect will continue to send the reports to the supervisor. Since his/her email address has been deactivated, the system will generate mailer-daemon emails unnecessarily. Note: if the supervisor used private customised reports, we invite you to contact your customer support to discuss possible recovery options.

Make sure that another supervisor has the same rights, to avoid leaving folders to be validated/deleted indefinitely in the Validation and Recycle Bin desktops.

A coordinator has left the company. What action(s) should I do?
Perform the actions described in the two previous answers. On the administration interface, assign the coordinator authorisations to his/her substitute.

11.2.2 Statistical reports

I do not receive / no longer receive a programmed report.
Various reasons may explain this fact. The following controls must be performed on the agent/supervisor interface in the Reporting menu ().

No programming has been defined for the report. Select the desired report. Move the cursor over the icon to the left of the report name: if a blue clock () is displayed, it means that no programming has been set up. You must create one (at least), so that the report can be sent.

A programming does exist, but it is suspended. If you have created it, you are the only one who can modify it: open the list of programmings for the affected report, then click the Activate button (▶) located on the corresponding line. Otherwise, contact the creator of the programming to perform the correction.

The sending frequency/day of the report has been set up incorrectly. It is necessary to correct the wrong programming(s) of the report. If you have created it, you are the only one who can modify it: open the corresponding list, then click the programming to be modified. Check the parameters of the sending frequency and, if necessary, the days checked. Perform the desired corrections. Otherwise, contact the creator of the programming to perform the correction.

You are not on the list of recipients. It is necessary to correct the wrong programming(s) of the report. If you have created it, you are the only one who can modify it: open the corresponding list, then click the programming to be modified. In the Recipients field, add the missing email address. After saving, it is recommended to check all the parameters of the report: the correction must be repeated as many times as necessary. However, if you are not the owner of the wrong programming, contact the creator to perform the correction.

The report contains too much data. The query failed to extract the results and the report was not sent. It is generally recommended to refine the criteria (filters, period, etc.) to reduce the number of results. You have two options: contact the supervisor who created the report to correct it, or contact the customer support.

The report uses a filter on a list of values among which one of them is not valid. The report must be updated by its owner to remove the obsolete values. As the previous case, you have two options: contact the supervisor who created the report to correct it, or contact your customer support.

How can I change the recipients of programmed reports that I do not own?
We recommend using a mailing list: with this single email address, all recipients are set up and managed by your company's mail server, independently of ALE Connect. This solution offers several advantages: when one of the recipients leaves the company, you do not need to change the programmings one by one, for each report affected. Simply update the mailing list. In addition, the number of recipients is no longer limited.

11.2.3 Folders

I cannot find a folder after a search.
Various reasons may explain this fact:

You have selected the wrong desktop. Make sure that the selected desktop is the one where the search must be performed.

The folder is no longer visible. You can no longer find the folder via the desktops, because of its characteristics: you do not have the rights to this folder, it is waiting to be validated, it has been merged, etc. We then advise to go through the contact sheet: you will find there all his/her history of folders, whatever their status. Simply click the folder to view it.

The folder no longer exists. It was permanently deleted by a supervisor.

The folder has been merged with another one. To find it, perform a search in the notepad (Notes field) entering the folder reference. Indeed, ALE Connect systematically adds a comment in the notepad of folders following a merge.

You have activated the Filtered display mode. This interface option only displays the folders that are assigned to the logged in agent, or unassigned. Folders assigned to other agents are hidden. Return to the List mode, to display all in progress or processed folders (depending on the case).

You have selected the wrong search field (message, subject, etc.). Check that the selected criterion (In field) matches the content in which you wanted to search. If it is wrong, select another criterion from the scrolling list.

There are too many results and they cannot be displayed. By default, ALE Connect restricts the display to the first 10,000 folders found, for performance reasons. When the number of results exceeds this limit, no results are displayed. It is therefore advised to refine the search, by specifying other criteria.

The indexing of the folders has not yet been updated. There is a time period between the last action performed on a folder and the update of the search index. Indeed, it is refreshed every 15 minutes. Wait a few minutes before restarting the search, or change your criteria.

I do not view the folders sent for validation by the agents.
This is because you are not declared as supervisor of the agents affected. Ask an authorised coordinator to check the parameters of your user sheet, from the administration interface: the group of supervised agents must be selected in the corresponding tab. If you are authorised, you can perform this control yourself.

Remember that these folders are stored in a separate desktop Validation, accessible from the taskbar on the left of your screen.

I need to export the email addresses from a selection of folders, for marketing purposes / integration into our CRM system.
Only a supervisor can export, from the agent interface, a list of email addresses matching a selection of folders. Start by selecting a desktop, then perform a search by targeting the folders you want to export. Click the Export button. The email addresses are exported in a file in .csv format.

What is the difference between closing and archiving a folder?
These two actions move the folder in the Processed desktop, with the Closed or Archived status respectively. The Close action closes the folder by generating a new exchange, visible in the history of exchanges of the folder. The Archive action also closes the folder without any particular action.

The major difference between these two actions concerns the statistics: when you close a folder with the Close action, the folder is taken into account in the calculation of the Quality of Service. But this is NOT the case if you archive it.

11.2.4 Email

The volume of emails to be processed is unusually low compared to the usual activity. What is happening?
If the volume is lower than usual (but not null), there may be several reasons:

There is an incident on the mail server. Only an authorised system administrator can check this, diagnose and solve the issue.

The routing rules are inappropriate / have been modified. As a result, new interactions are misdirected to the different queues and skills in ALE Connect. That is why we recommend to create a "universal" user account belonging to a group with access to all queues, skills and languages. This user will thus be able to view the folders on his/her interface, then redirect them manually while waiting the parameters of routing rules be updated (performed by an authorised administrator or coordinator).

I wrote a draft response. Is it visible to other agents?
Yes, the draft is visible to all collaborators in the contact centre.

11.2.5 Chat

The widget is displayed too often: can we make it so that it only appears when an agent is actually available?
Yes, you need to set up ALE Connect so that the software refuses to place web users in realtime queue when no agent is available to process the chat.

To do this, a coordinator must change the properties of the queue in which the chat conversations arrive: this is the Adjustment of the realtime queue size (% of the number of agents logged in x maximum number of conversations) parameter that sets up the number of web users placed in realtime queue, when all the agents authorised to process chat conversations have reached their maximum quota of authorised conversations. By defining a value equal to 0, no web user is placed in realtime queue and the widget is therefore not displayed.

Can a survey be triggered at the end of a chat?
Yes, it is possible technically (e.g. inserting a link to an external survey at the end of the conversation). To identify the most appropriate solution to your needs and context, we invite you to contact your customer support.

When chatting, is it possible to use autocomplete sentences to go faster?
Yes, it is possible to define response templates to the most frequently asked questions in the ALE Connect knowledge base (from the administration interface). Warning, they must have the Message type, otherwise they will not be usable during a chat. Only a coordinator or supervisor can perform this operation.

I want to use a response template that exists in our knowledge base, but it does not appear when I start typing my text.
This is because the type of this response is wrong: only message type responses can be used in chat conversations. Since this characteristic cannot be modified, a coordinator or supervisor must re-create this response template in the knowledge base from the administration interface, being careful to select the Create message option.

How to set up a chat service opening calendar?
From the administration interface, a coordinator must create a calendar by tenant. It details the time slots (opening and closing hours) of the teams handling chat conversations. Outside the working hours set up by the calendar, this service will not be available.