



Alcatel-Lucent Enterprise Connect powered by AKIO Agent

User guide

8AL91316ENAAed1

Table of contents

1	Welcome to ALE Connect	9
1.1	Minimum required configuration	10
1.2	License and media	12
1.3	Logging in to ALE Connect	13
1.3.1	Login	13
1.3.2	Logout	14
1.4	User profiles	15
2	Getting started	16
2.1	My ALE Connect interface	16
2.1.1	Banner	16
2.1.2	Taskbar	17
2.1.3	Workspace	18
2.2	Desktops and folders	19
2.2.1	Internal desktop	19
2.2.2	External desktop	20
2.2.3	List of folders	21
2.2.4	Action bar	24
2.2.5	Browsing bar	25
2.3	My operational status	26
2.3.1	Colour legend	26
2.3.2	Available statuses	27
2.3.3	Choose your operational status	28
2.4	My activity in real time	29
2.5	My calendar	30
2.5.1	Accessing your calendar	31
2.5.2	Filtering the calendar	31
2.5.3	Creating a task	32
2.5.4	Viewing the details of a task	33
2.5.5	Modifying a task	34
2.6	Entry rules in ALE Connect	35
2.6.1	Best practices	35
2.6.2	Format constraints	35
2.7	General parameters	36
2.7.1	About ALE Connect version	36
2.7.2	Application status	36
2.7.3	Access to online help	36
2.7.4	Software logout	36
3	Distribution of interactions	37
3.1	General principle	37
3.2	Push/pull modes	37
3.3	Browser notifications	38

3.4	<i>ALE Connect application freeze</i>	40
3.4.1	Interactions taken into account	40
3.4.2	What you see on screen.....	40
4	Phone calls	41
4.1	<i>Supporting an incoming call</i>	42
4.1.1	Supporting an ACD call.....	42
4.1.2	Supporting a CCD direct call	43
4.1.3	Supporting a private call	43
4.2	<i>Introducing the voice folder</i>	44
4.2.1	Overview	44
4.2.2	Incoming call tab	45
4.2.3	Contact tab	46
4.2.4	History tab	46
4.2.5	Knowledge base tab	46
4.2.6	Script tab	46
4.2.7	Qualification tab.....	46
4.3	<i>Processing an incoming call</i>	47
4.3.1	If you had tasks in progress	47
4.3.2	Procedure	47
4.4	<i>Using the remote control</i>	48
4.5	<i>Ending a call</i>	49
4.5.1	Finalising the folder	49
4.5.2	The wrap-up time is over	50
4.6	<i>Putting a call on hold</i>	51
4.6.1	Putting a call on hold	51
4.6.2	Resuming a call on hold.....	51
4.6.3	Callback following a put on hold	51
4.7	<i>Handling a second call</i>	52
4.7.1	Performing a second call to an agent.....	52
4.7.2	Performing a second call to a pilot	52
4.7.3	Stopping a second call	53
4.8	<i>Transferring a call</i>	54
4.8.1	Transferring a call to an agent	54
4.8.2	Transferring a call to a pilot	56
4.8.3	Receiving a call transfer	58
4.9	<i>Performing an outbound call</i>	59
4.9.1	Performing an ACD outbound call	59
4.9.2	Performing a private outbound call	59
5	Emails	60
5.1	<i>Supporting an email</i>	61
5.1.1	In push mode	61
5.1.2	In pull mode	62
5.2	<i>Introducing the email folder</i>	63
5.2.1	Overview	63

5.2.2	Incoming message	64
5.2.3	Reply interface.....	65
5.3	<i>Processing an email</i>	66
5.4	<i>Processing actions</i>	68
5.5	<i>Writing help tools</i>	69
5.5.1	Response templates	70
5.5.2	Introduction and conclusion messages.....	73
5.5.3	Copying and pasting images	73
5.5.4	Artificial intelligence engine.....	74
5.5.5	Preview before sending/printing	75
5.6	<i>Editing and formatting options</i>	76
5.6.1	Text formatting	76
5.6.2	Table formatting.....	77
5.7	<i>Attaching files to an email</i>	78
5.7.1	Limits	78
5.7.2	Adding attachments	78
5.7.3	Removing attachments.....	79
5.8	<i>Using the address book</i>	80
5.9	<i>Sending a spontaneous email</i>	81
5.10	<i>Sending a grouped email</i>	83
5.11	<i>Email address formats</i>	84
6	<i>Chat</i>	85
6.1	<i>Supporting a chat</i>	86
6.1.1	Prerequisites	86
6.1.2	Step 1: chat arrival.....	86
6.1.3	Step 2: choice of the action.....	87
6.2	<i>Introducing the Chat folder</i>	88
6.2.1	Overview	88
6.2.2	Conversation tab.....	89
6.2.3	Info tab.....	89
6.2.4	Contact tab	90
6.2.5	History tab.....	90
6.2.6	Knowledge base tab	90
6.2.7	Script tab	90
6.2.8	Qualification tab.....	90
6.3	<i>Processing a chat</i>	91
6.3.1	If you had tasks in progress	91
6.3.2	Procedure	92
6.3.3	The web user is inactive	94
6.4	<i>Using the remote control</i>	95
6.5	<i>Ending a chat</i>	96
6.5.1	Finalising the folder	96
6.5.2	The wrap-up time is over	97

6.6	<i>Managing multiple chats</i>	98
6.7	<i>Requalifying a chat</i>	99
6.8	<i>Stopping the chat distribution</i>	100
6.8.1	Stopping	100
6.8.2	Restarting	100
6.9	<i>In case of logout of the web user</i>	101
7	<i>Facebook Messenger</i>	102
7.1	<i>Supporting an interaction</i>	103
7.2	<i>Introducing the Messenger folder</i>	104
7.2.1	Overview	104
7.2.2	Conversation tab	105
7.2.3	Info tab	105
7.2.4	Context tab	105
7.2.5	Contact tab	106
7.2.6	History tab	106
7.2.7	Knowledge base tab	106
7.2.8	Script tab	106
7.2.9	Qualification tab	106
7.3	<i>Processing a Facebook Messenger conversation</i>	107
7.4	<i>Inserting animated GIFs</i>	109
7.5	<i>Using the remote control</i>	111
7.6	<i>Ending a Facebook Messenger conversation</i>	112
7.6.1	Finalising the folder	112
7.6.2	The wrap-up time is over	113
8	<i>Twitter DM</i>	114
8.1	<i>Supporting a Twitter folder</i>	115
8.2	<i>Introducing the Twitter folder</i>	116
8.2.1	Overview	116
8.2.2	Conversation tab	117
8.2.3	Info tab	117
8.2.4	Context tab	117
8.2.5	Contact tab	118
8.2.6	History tab	119
8.2.7	Knowledge base tab	119
8.2.8	Script tab	119
8.2.9	Qualification tab	119
8.3	<i>Processing a Twitter DM conversation</i>	120
8.4	<i>Using the remote control</i>	122
8.5	<i>Ending a Twitter DM conversation</i>	123
8.5.1	Finalising the folder	123
8.5.2	The wrap-up time is over	124

9	Folders of the internal desktop.....	125
9.1	Creating a folder.....	126
9.1.1	For a new contact	126
9.1.2	For an existing contact	130
9.2	Viewing a folder.....	131
9.3	Statuses of an internal folder.....	132
9.3.1	In progress desktop.....	132
9.3.2	Processed desktop	133
9.4	Actions on the list	135
9.4.1	Filtering the list of folders	135
9.4.2	Searching folders	139
9.4.3	Previewing the content of folders.....	143
9.4.4	Printing folders.....	144
9.4.5	Grouping folders for simultaneous action	145
9.4.6	Moving folders to the recycle bin	147
9.4.7	Exporting email addresses.....	148
9.4.8	Merging folders.....	149
9.5	During the processing	151
9.5.1	Notepad	151
9.5.2	Widgets.....	153
9.5.3	Browsing context	156
9.5.4	Folder's contact	159
9.5.5	Contact history.....	162
9.5.6	History of exchanges	164
9.5.7	Knowledge base.....	166
9.5.8	Conversation script.....	173
9.5.9	Qualifying a folder.....	174
9.6	Inventory of actions	176
9.6.1	Redirecting a folder to a queue	176
9.6.2	Redirecting a folder to an agent	178
9.6.3	Redirecting a folder to a skill.....	180
9.6.4	Redirecting a folder to an expert	183
9.6.5	Redirecting a folder to an external agent.....	185
9.6.6	Forwarding a folder	187
9.6.7	Changing the priority of a folder	189
9.6.8	Closing a folder	190
9.6.9	Archiving a folder.....	191
9.6.10	Freeing a folder	192
9.6.11	Reserving a folder	193
9.6.12	Duplicating a folder	194
9.6.13	Reactivating a folder	195
10	Folders of the external desktop	196
10.1	Statuses of an internal folder.....	197
10.2	Processing an external folder	199

10.3	Archiving an external folder	201
10.4	Moving an external folder to the recycle bin.....	202
10.5	Refusing an external folder	203
10.6	Reminding an external agent	204
11	Contacts	205
11.1	Creating a contact sheet.....	206
11.1.1	Out of a folder	207
11.1.2	During the processing of a folder.....	210
11.1.3	By creating a folder simultaneously.....	210
11.2	Viewing a contact sheet.....	211
11.2.1	Out of a folder	211
11.2.2	During the processing of a folder.....	212
11.3	Modifying a contact sheet	213
11.3.1	Out of a folder	213
11.3.2	During the processing of an email folder.....	213
11.3.3	When processing a folder from another media.....	214
11.4	Searching a contact	215
11.4.1	Out of an interaction.....	215
11.4.2	During the processing of a folder.....	216
11.5	Viewing the contact history	217
11.6	Merging contacts	219
11.6.1	Why remove duplicates?	219
11.6.2	Procedure	220
11.7	Specific case: deletion	221
12	More help	222
12.1	Glossary	222
12.2	Frequently Asked Questions (FAQ)	227
12.2.1	User accounts	227
12.2.2	Statistical reports.....	228
12.2.3	Folders	229
12.2.4	Email.....	230
12.2.5	Chat.....	231

www.al-enterprise.com The Alcatel-Lucent name and logo are trademarks of Nokia used under license by ALE. To view other trademarks used by affiliated companies of ALE Holding, visit: www.al-enterprise.com/en/legal/trademarks-copyright. All other trademarks are the property of their respective owners. The information presented is subject to change without notice. Neither ALE Holding nor any of its affiliates assumes any responsibility for inaccuracies contained herein. © Copyright 2021 ALE International, ALE USA Inc. All rights reserved in all countries.



History

Software version	Date	Author	Subject
7.19.3	06/09/2021	AKIO	

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 91 ESR

Recommended

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



Internet Explorer 11

Update 24 minimum

From the menu bar, click Tools > Internet options > General tab > Settings button > Temporary Internet Files tab. For the Check for newer version of stored pages option, check the Automatically value.

Warning: even though IE 11 is compatible with ALE Connect, it shows penalizing technical limitations. Indeed, IE 11 does not support the Notification API. Therefore, the functionality allowing to notify incoming interactions (calls, emails, chat, etc.) is not available if you use this browser. In addition, when using the system features such as opening or saving an attachment, the user will be logged out if the pop-up remains opened for more than 30 seconds.

Screen resolution

- 1920 x 1080 - Recommended with a wide screen
- 1280 x 1024 - Minimum resolution supported

Memory

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

Network

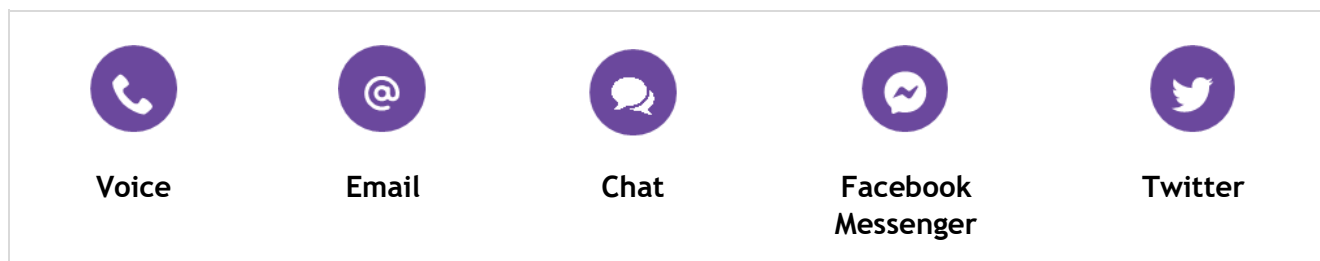
- For an optimal performance, **direct communication** between the browser and ALE Connect web services in the Cloud is recommended. Consequently, please ensure that no component can disturb this communication (example: antivirus, proxy, etc.).
- Communication on **TCP 443** ports (by default) is required 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 position 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 E-mail 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.

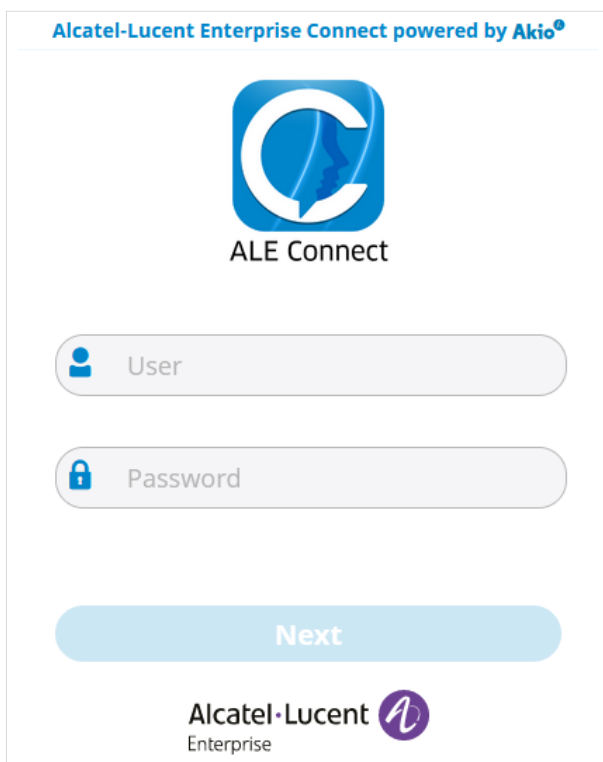
1.3 Logging in to ALE Connect

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.
5. Select your **processing group**.
6. Click the **Login** button: the interface is displayed.

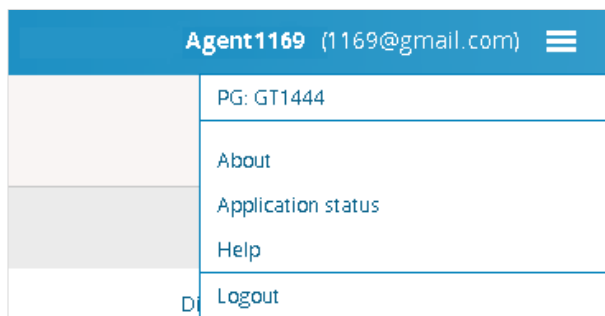
The access to the different functionalities depends on your profile.

1.3.2 Logout

Warning: you must log out properly when your work 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** button (☰) in the right upper corner of the application.
2. Click the **Logout** button.



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 the contacts, according to its read and write rights on the corresponding queues.

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

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

The screenshot shows the ALE Connect interface. At the top is a blue header bar with the Alcatel-Lucent logo, 'ALE Connect', 'Alcatel-Lucent Enterprise', and 'Agent1169 (1169@gmail.com)'. Below the header is a light gray banner area with a green checkmark icon and a 'Pull' button. The main workspace is divided into a left sidebar (taskbar) and a central area. The sidebar contains icons for a window, a folder (labeled '5'), a calendar, and a list of icons. The central area displays a table titled 'IN PROGRESS' with columns: In progress (5), Draft, Number, Deadline, Origin, Date, Subject, Queue, Skill, Status, and Agent. The table contains four rows of data. A red circle '1' is in the banner area, a red circle '2' is in the sidebar, and a red circle '3' is in the workspace area.

In progress (5)	Draft	Number	Deadline	Origin	Date	Subject	Queue	Skill	Status	Agent		
<input type="checkbox"/>	@	76662	0m	5	maggie.williams@m...	1:48 PM	Product cancellation	1	Orders	Sales	To be proces	----
<input type="checkbox"/>	@	76661	0m	5	kyle.mitchell@mailb...	1:48 PM	Problem with the delivery	1	Orders	Sales	To be proces	----
<input type="checkbox"/>	@	76589	22h 22m	5	ann.smith@mailbox...	July 27, 2021	My order 123456789	1	Orders	Sales	Validation re	JONES
<input type="checkbox"/>	@	76588	22h 27m	5	peter.evans@mailbo...	July 27, 2021	International delivery	1	Orders	Sales	To be proces	JONES

1 Banner

2 Taskbar

3 Workspace

2.1.1 Banner

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

The screenshot shows the banner area of the ALE Connect interface. It contains a green phone icon, a 'Push Voice' button, a red circle '1' next to the 'Push Voice' button, a red circle '2' next to a '00:12' timer, and a red circle '3' next to a 'Push Voice' button.

1 Choice of the operational status

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

3 Console parameters

* 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:

IN PROGRESS

In progress (5)

Display by 18

	M...			Draft	Number	Deadline		Origin	Date	Subject		Queue	Skill	Status	Agent
<input type="checkbox"/>	@				76662	0m	5	maggie.williams@m...	1:48 PM	Product cancellation	1	Orders	Sales	To be processed	----
<input type="checkbox"/>	@				76661	0m	5	kyle.mitchell@mailb...	1:48 PM	Problem with the delivery	1	Orders	Sales	To be processed	----
<input type="checkbox"/>	@				76589	22h 22m	5	ann.smith@mailbox....	July 27, 2021	My order 123456789	1	Orders	Sales	Validation required	JONES
<input type="checkbox"/>	@				76588	22h 27m	5	peter.evans@mailbo...	July 27, 2021	International delivery	1	Orders	Sales	To be processed	JONES

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).

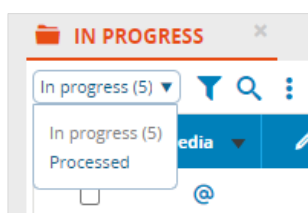
2.2 Desktops and folders

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. 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.

There are two types of desktops: internal or external.

2.2.1 Internal desktop

It contains folders whose processing is ensured by users declared and logged in to ALE Connect. To view it, click the **Desktop** button (🏠) and select **Internal**.



In progress

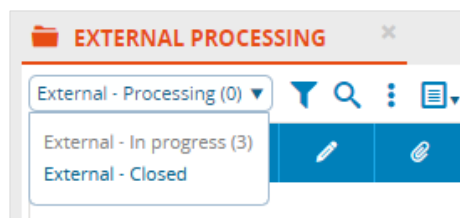
Displayed by default at your login, this desktop presents the list of folders for email, Facebook Messenger or Twitter interactions that are currently being processed for all agents. However, voice or chat folders in progress do not appear.

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. **Note:** when the agent is in push mode and Filtered, this desktop only displays folders processed by the logged in agent.

2.2.2 External desktop

It contains folders whose processing is ensured by collaborators of the contact centre who do not use ALE Connect. Indeed, a folder can be transferred to an external agent, when the situation requires it. The external desktop is hidden by default: to view it, click the **Desktop** button (🏠) and select **External**.



In progress

This desktop contains the folders which have been transferred to external agents and which are being processed.

Closed

This desktop presents folders closed by external agents.

2.2.3 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.

IN PROGRESS

In progress (5)

Display by 18

1-5 on 5

	M...			Draft	Number	Deadline	!	Origin	Date	Subject		Queue	Skill	Status	Agent
<input type="checkbox"/>	@				76662	0m	5	maggie.williams@m...	1:48 PM	Product cancellation	1	Orders	Sales	To be proces	----
<input type="checkbox"/>	@				76661	0m	5	kyle.mitchell@mailb...	1:48 PM	Problem with the delivery	1	Orders	Sales	To be proces	----
<input type="checkbox"/>	@				76589	22h 22m	5	ann.smith@mailbox....	July 27, 2021	My order 123456789	1	Orders	Sales	Validation re	JONES
<input type="checkbox"/>	@				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	Deadline	
6868	0m	5
7548	3h 40m	5
6994	20h 19m	5
2346	5j	5

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

Priority (!)

Folder processing priority from 1 to 5; 1 being the highest. 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.

E-mail: 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

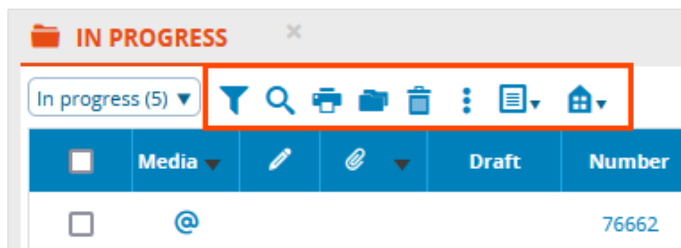
Current status of the folder.









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 "----".

2.2.4 Action bar

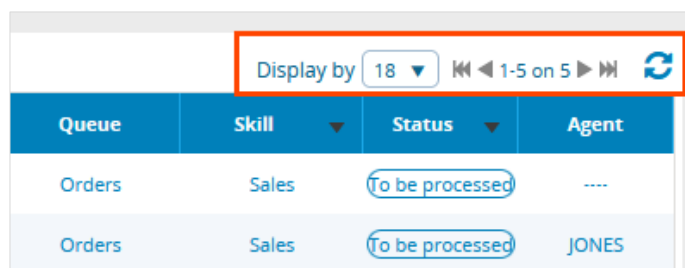
The action bar is located just above the list of folders:



-  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 only the list of folders for the logged in agent
-  Choose the type of desktop to display

2.2.5 Browsing bar

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



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.

1-18 sur 97

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 (Withdraw). 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 interactions to you.

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:

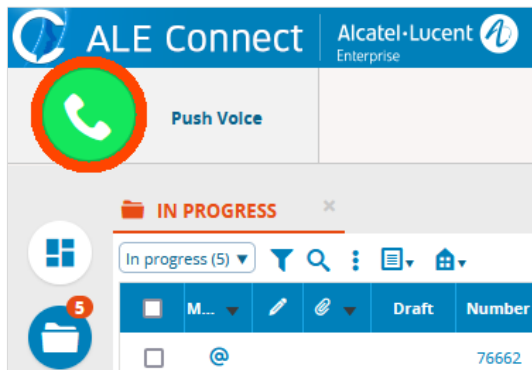
-  You are available to process interactions.
-  You are busy with additional tasks which do not allow you to process interactions.
-  You are considered as unavailable to process interactions.

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 <u>chats distributed</u> by ALE Connect. Nevertheless, you remain free to process other folders at the same time in <u>mode pull</u> (emails, Facebook Messenger or Twitter interactions).
Push Email		You can only process <u>emails distributed</u> by ALE Connect. Nevertheless, you remain free to process other folders at the same time in <u>mode pull</u> (emails, Facebook Messenger or Twitter interactions).
Push Voice		You can only process <u>calls distributed</u> by ALE Connect. Nevertheless, you remain free to process other folders at the same time in <u>mode pull</u> (emails, Facebook Messenger or Twitter interactions).
Withdraw		You are temporarily out of the distribution. Indeed, the distribution of interactions in <u>push mode</u> stops. It restarts when you change your operational status. This status is assigned by default when you log in.
WrapUp		This temporary status allows you to momentarily interrupt the <u>distribution of interactions</u> in <u>push mode</u> 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.

2.3.3 Choose your operational status

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



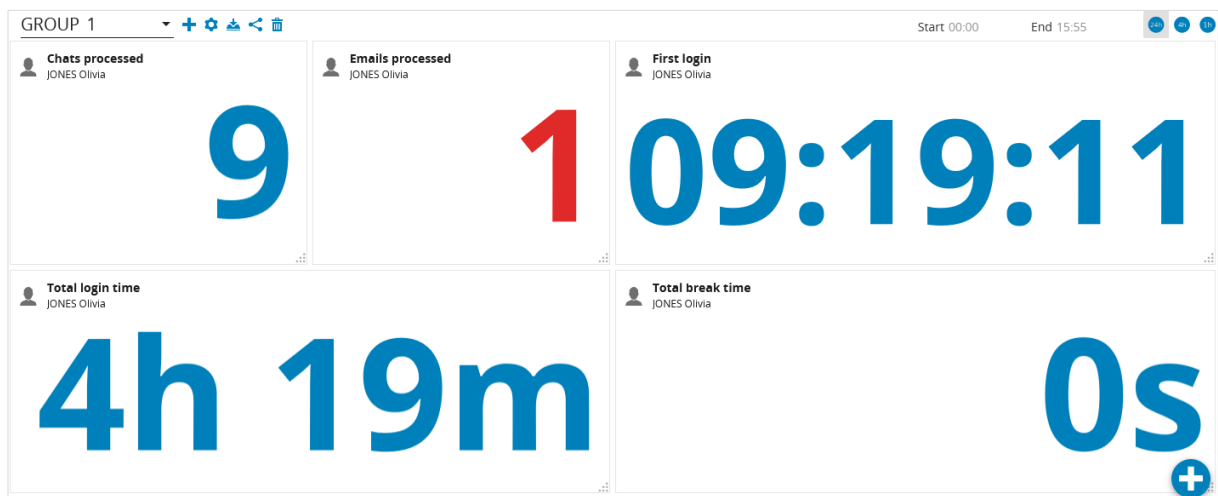
2. Select an **operational status** from the list. This choice will condition the distribution of interactions and the tasks that are authorised to you.
3. Your status is immediately updated: only the actions authorised by this new status will be possible both on ALE Connect and your phone device.

2.4 My 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:

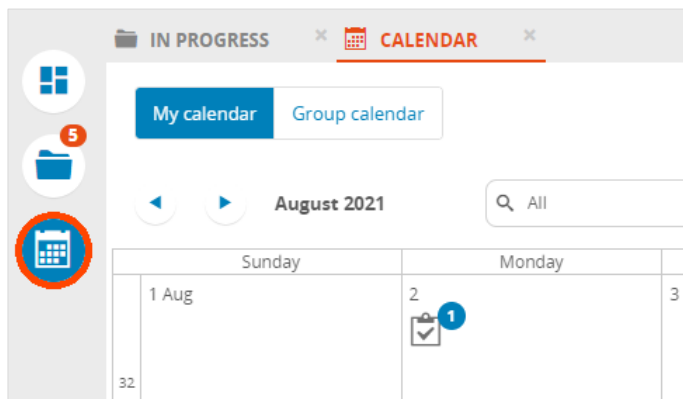


If your dashboard contains at least one curve type graph, you can choose the default display period of data. Simply click the button corresponding to the desired **viewing period**: 24h, 4h or 1h.

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

2.5 My calendar

From the taskbar of your ALE Connect interface, you have access to a calendar. This allows you to manage your personal tasks. Note that the calendar can be opened/used independently of your other current tasks on ALE Connect.

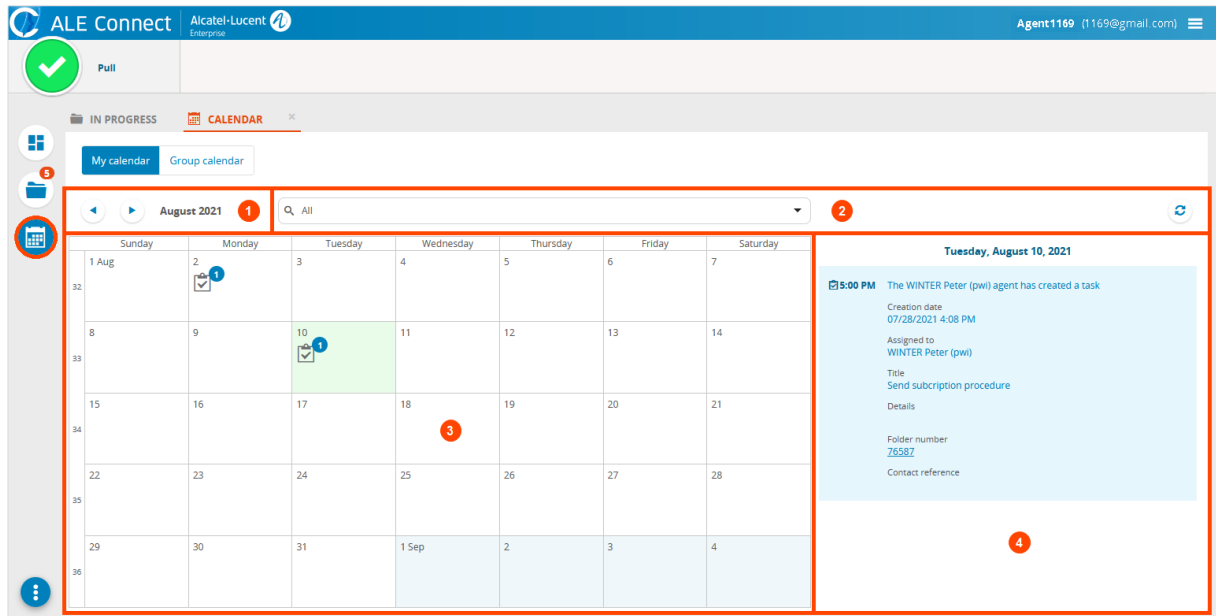


As this view centralises personal events, neither your supervisor nor the agents in your group can see them.

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

2.5.1 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 (↻).

2.5.2 Filtering the calendar

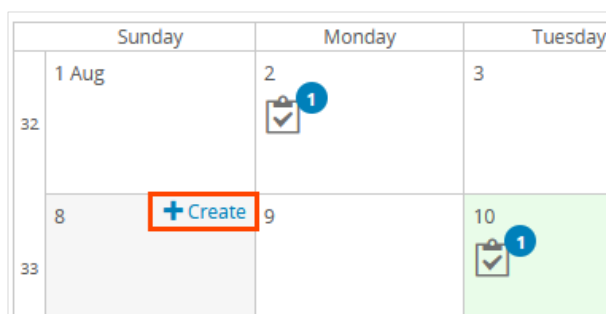
You can choose the events to display in your calendar. After selecting one or several filters, the calendar is automatically updated. The applied filters are memorised by ALE Connect, when you switch from one view to another in the calendar.

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.

2.5.3 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.

Create a task

Assigned to

Group

GROUP 2

Agent(s)

WINTER Peter

Description

Title *

Send the subscription procedure

Date *

08/08/2021 5:00 PM

Details

Additional information

Folder number

76587

Contact reference

CREATE

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

8. Fill in the **ALE Connect folder number** and/or the **contact reference** associated to 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:



2.5.4 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.

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

 **5:00 PM** The WINTER Peter (pwi) agent has created a task

Creation date

07/28/2021 4:24 PM

Assigned to

WINTER Peter (pwi)

Title

Send the subscription procedure




Details

Folder number

[76587](#)

Contact reference

2.5.5 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.
5. Hover over the task  you wish to modify then click **Modify the task** ()
6. Edit the information you wish to change.
7. Click **Validate** to save your entry.

The task is automatically updated in your calendar.

2.6 Entry rules in ALE Connect

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.

2.6.1 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

2.6.2 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:

The screenshot displays the 'CREATION OF A NEW FOLDER FOR A NEW CONTACT' screen. At the top, there are dropdown menus for 'Email' and 'Email - CONTACT FORM - 14'. Below these is a section for '*Select a queue' with a 'Claims' dropdown. The main section is titled 'CONTACT DETAILS' and contains several input fields: 'Title' (with a dropdown set to 'Mr'), '*Last name', '*First name', and 'Company'. Each of these four fields has a red border and a red information icon to its right. On the right side of the form, a red text block lists the validation errors: 'Validation error(s): Last name is a mandatory field. First name is a mandatory field. Email address is a mandatory field. Request subject is a mandatory field. Question is a mandatory field.'

2.7 General parameters

On the right upper corner of the banner, a menu allows access to the application **parameters** (≡):

- About ALE Connect version
- Application status
- Access to online help
- Software logout




2.7.1 About ALE Connect version

This 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.

2.7.2 Application status

This functionality, reserved for users with a technical profile, allows you to monitor the status of the network and server on which the ALE Connect platform is installed, by displaying resource indicators.

Their status is illustrated by a colour indicator:

-  Normal
-  Warning
-  Critical

Indicator	Parameter	Warning threshold	Critical threshold (red)	Unit
Download speed	MONITORING_NETWORK_UP	25	20	Mb/s
Upload speed	MONITORING_NETWORK_DOWN	50	40	Mb/s
Ping (response time)	MONITORING_NETWORK_PING	250	1000	Ms

The default values can be adjusted by the administrator only.

2.7.3 Access to online help

This 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.

2.7.4 Software logout

This button allows you to log out from the application.

3 Distribution of interactions

3.1 General principle

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 work 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 Browser notifications

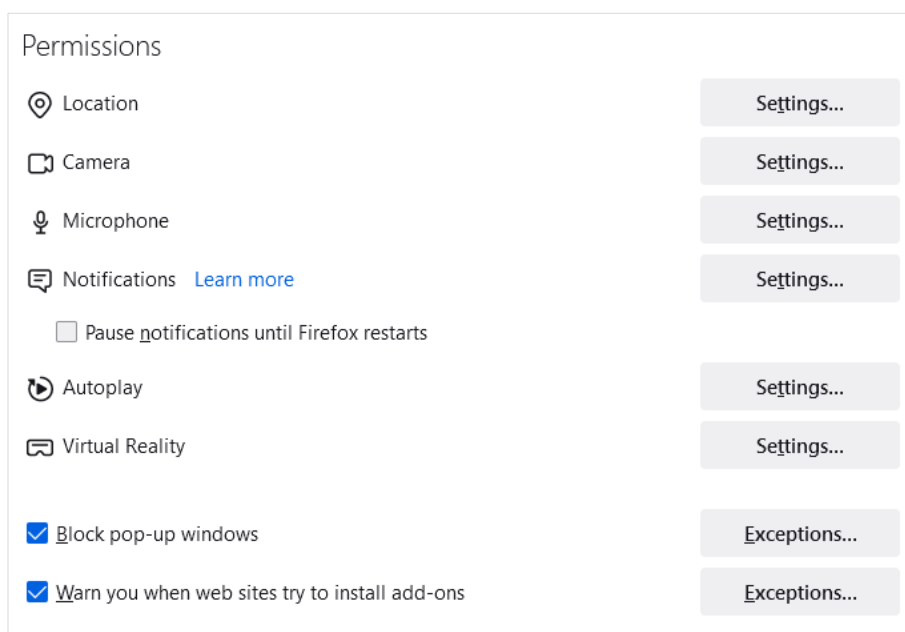
Whenever ALE Connect is not opened in the foreground on your desktop, you have the option to receive HTML5 notifications: they will allow you to always be informed of the arrival of an interaction in push mode, especially if you carry out other tasks outside ALE Connect.

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:

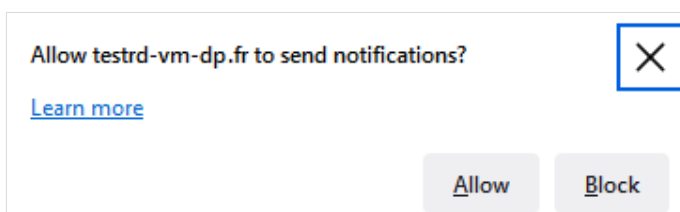
1. Activate the **notification management** in the browser parameters used by ALE Connect (please refer to the documentation of the relevant editors).

Example with the Mozilla Firefox® browser:



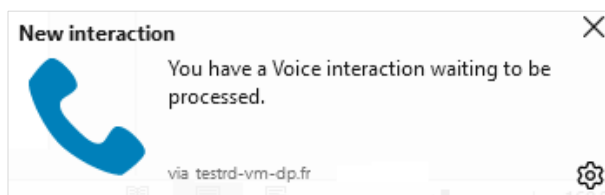
2. Accept to **receive notifications** from ALE Connect.

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.

3.4 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.

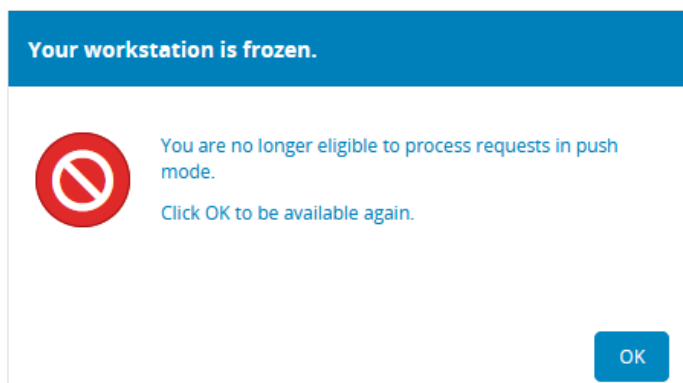
3.4.1 Interactions taken into account

The ALE Connect application freeze counts the following ignored interactions:

- chat conversations,
- emails distributed in push mode.

3.4.2 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 phone 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

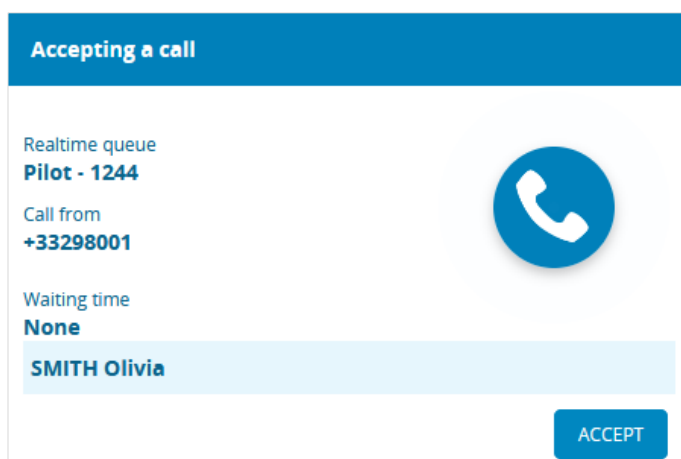
When a person calls the contact centre, ALE Connect selects the agent to be called for the connection. The call distribution is automatically performed, depending on the availability of the agents.

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 correspondent. 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:

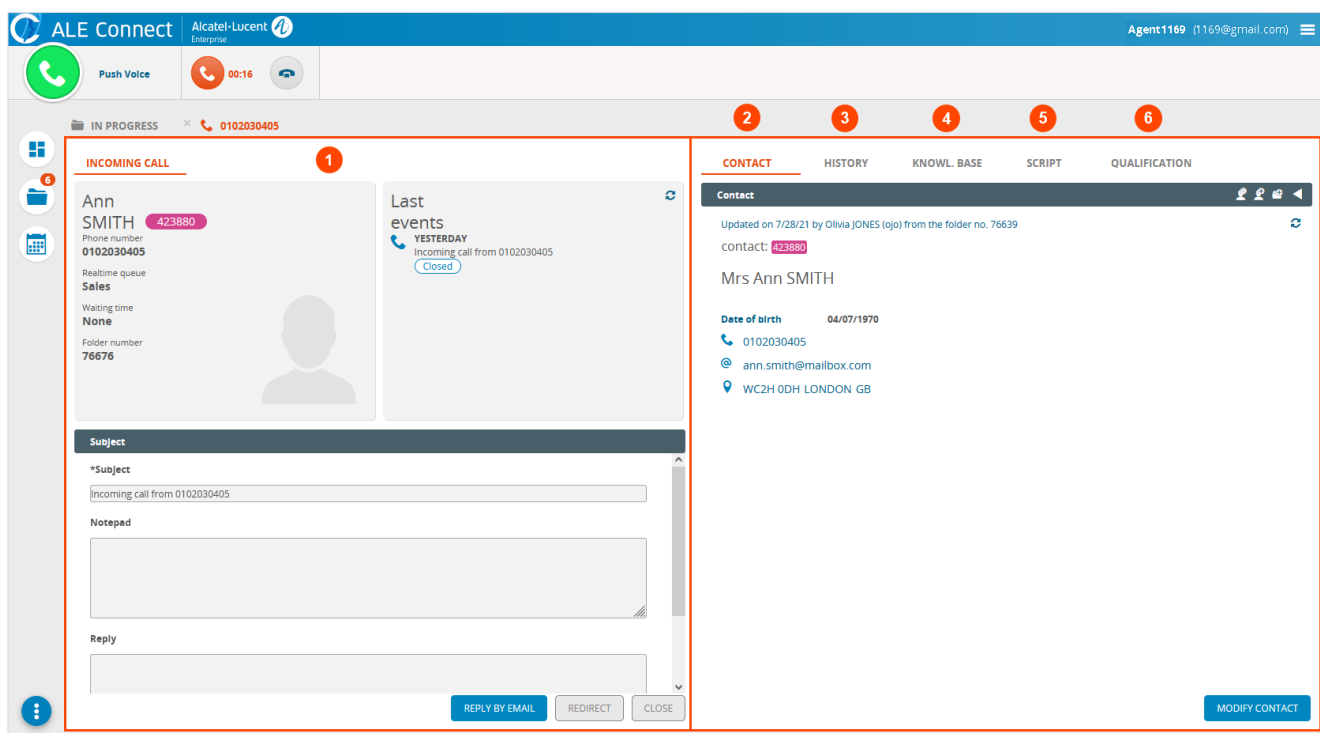
- The pop-up window displays only the caller's information with his/her phone number if the agent is unknown, with no realtime queue or waiting time.
- No folder is created on ALE Connect.

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 | 4 Knowledge base |
| 2 Contact | 5 Script |
| 3 History | 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.

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. 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. 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 symbolised 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 symbolised 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

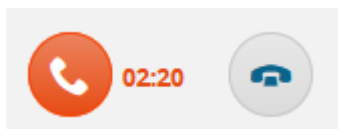
1. As soon as you are connected with the web user, the folder is opened in your ALE Connect interface.
2. Follow the conversation script displayed in the **Script** tab.
If no script was provided to you as a support, the tab is hidden: go to the next step.
3. Process the contact's request.
4. When the conversation is over, **hang up your phone** or **click the corresponding button** from the remote control.





If the contact 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.
	<u>Wrap-up</u>	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.
	<u>Hang up</u>	Permanent	Ends the conversation by hanging up the current call. You enter the wrap-up phase.

4.5 Ending a call

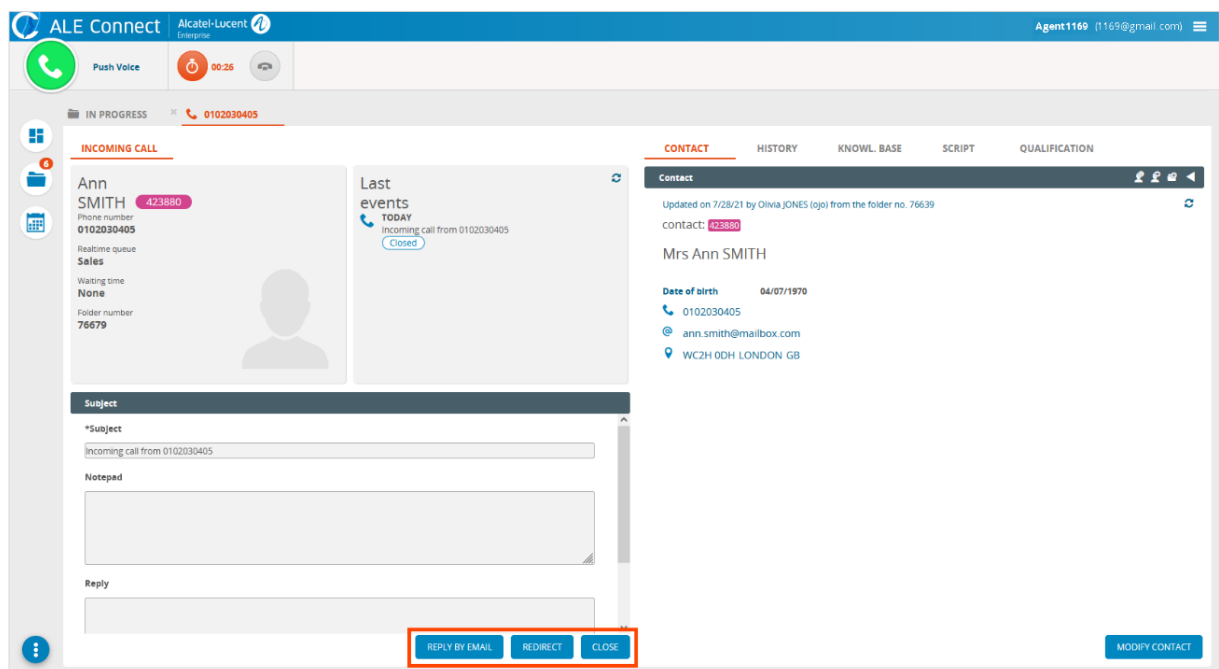
Simply hang up your handset or click the **Hang up** button (📞) of the remote control. You enter the **wrap-up** phase (duration configured by an administrator).

In all cases, you remain unavailable to support a new call until the folder is automatically closed. At the bottom of the screen, several buttons are displayed in the Incoming call tab: you can choose what to do with the folder. Without any action from you, 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.

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.

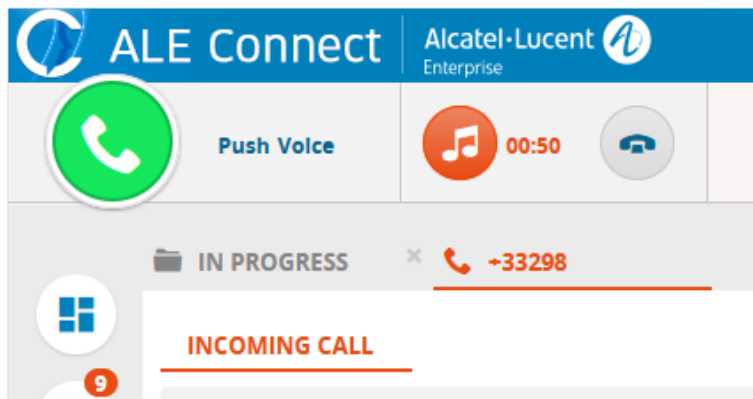
4.6 Putting a call on hold

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.

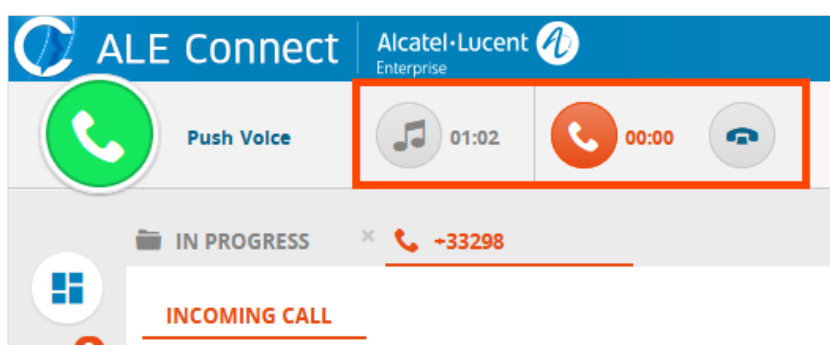
4.7 Handling a second call

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

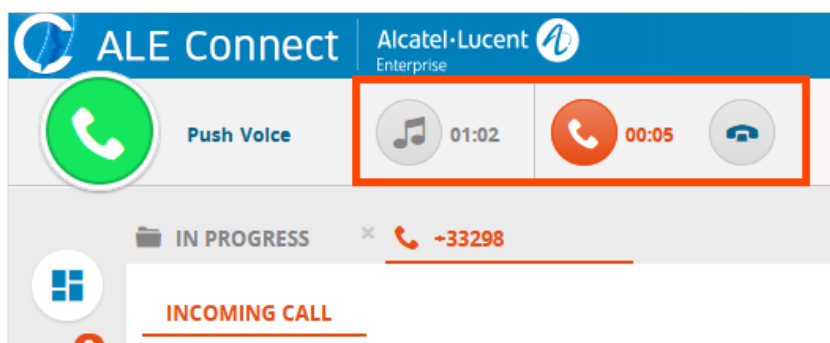
1. From your phone device, press the key allowing to **start a new call**.
2. Dial the **phone number** of the agent to call. The contact is then put on hold. A second remote control is displayed on your interface:



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.

3. 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, to the recipient of your choice.

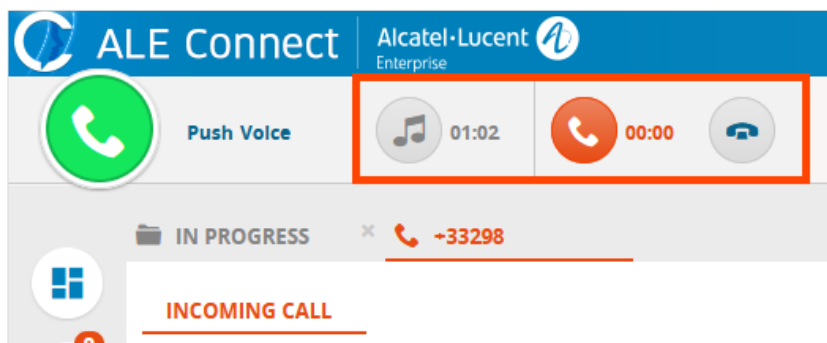
4.8.1 Transferring a call to an agent

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 Unsupervised transfer

Also called **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 your phone device, press the key allowing to **start a new call**.
2. Dial the phone number of the agent to which you wish to transfer the call. The contact is then put on hold. A second remote control is displayed on your interface:

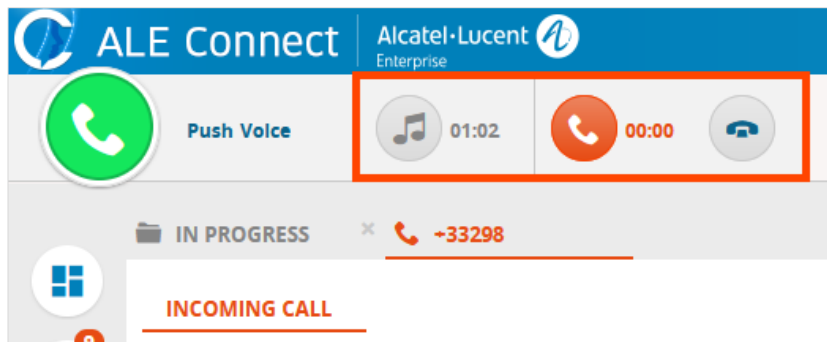


3. The recipient agent receives your call via a pop-up. Without waiting for the agent answer and from your phone device, **confirm the transfer** by pressing the corresponding key.
4. The call and the corresponding folder are transferred to the agent. The agent is then free to accept or refuse the transferred call. On your ALE Connect interface, the remote controls and the folder disappear.

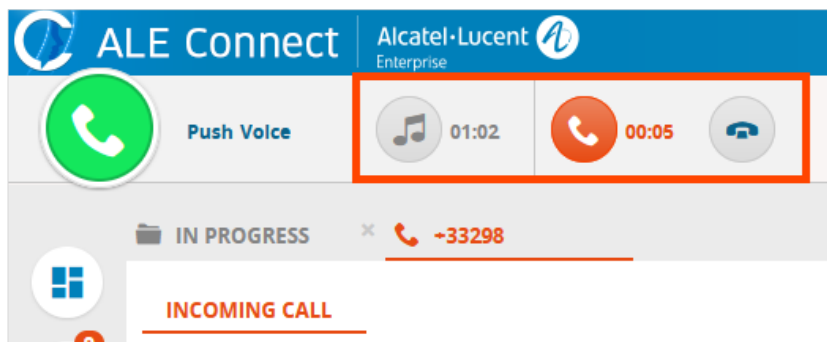
4.8.1.2 Supervised transfer

Also called **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 your phone device, press the key allowing to **start a new call**.
2. Dial **the phone number of the agent** to which you wish to transfer the call. The contact is then put on hold. A second remote control is displayed on your interface:



3. 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. From your phone device, **confirm the transfer** by pressing the corresponding key.

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.

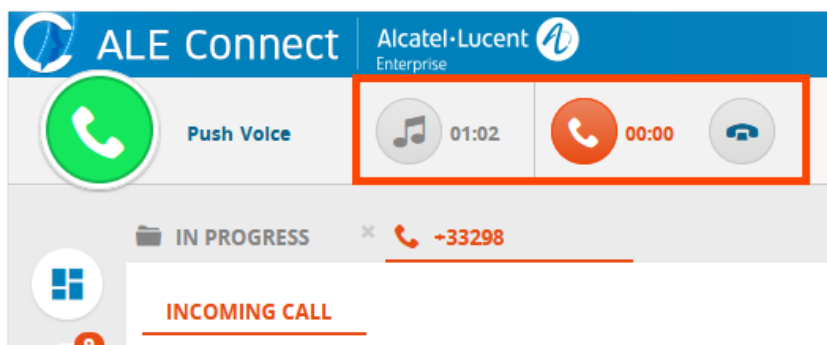
4.8.2 Transferring a call to a pilot

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 your phone device, press the key allowing to **start a new call**.
2. Dial the **pilot number** to which you wish to transfer the call. The contact is then put on hold. A second remote control is displayed on your interface:

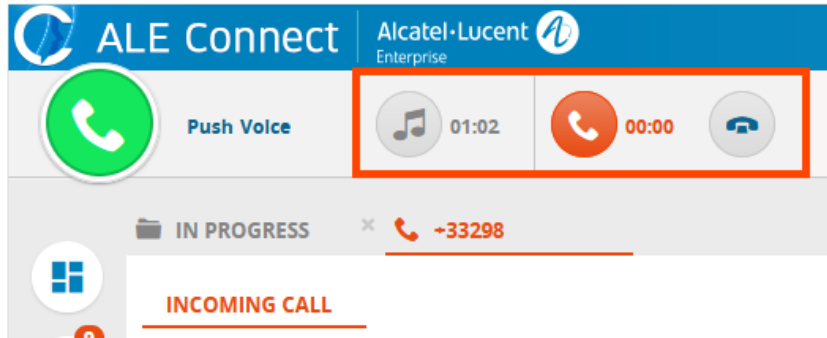


3. From your phone device, **confirm the transfer** by pressing the corresponding key, without waiting for the distribution result.

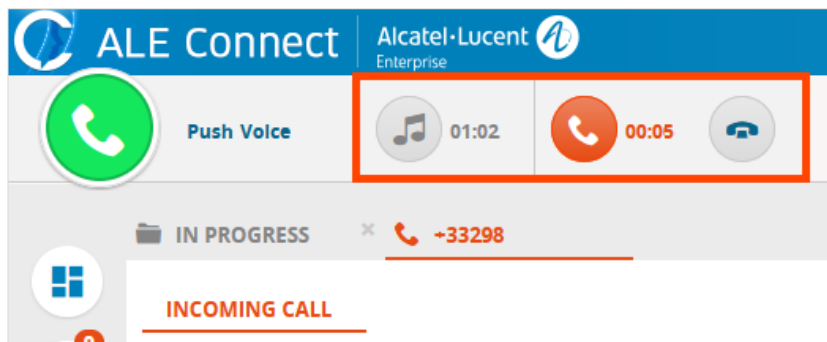
On your ALE Connect interface, the remote controls and the folder disappear. The call is then distributed to another available agent, who is free to accept or refuse the transfer. The call and the corresponding folder will be transfer to the agent who will accept the transferred call.

4.8.2.2 Supervised transfer

1. From your phone device, press the key allowing to **start a new call**.
2. Dial the **pilot number** to which you wish to transfer the call. The contact is then put on hold. A second remote control is displayed on your interface:



3. The call is distributed to an eligible and available agent on the pilot. The agent receives the call via a pop-up (as an incoming call) and **accepts** it: the timer of this second call starts as soon as you are in conversation with the agent.



4. From your phone device, **confirm the transfer** by pressing the corresponding key.

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.

4.8.3 Receiving a call transfer

A transferred call is supported in the same way as an incoming call. If you are already processing a call, a double remote control will be displayed in your ALE Connect interface.

1. When you receive a transferred call, a **pop-up window** is displayed on your interface.

According to the type of transfer (agent or pilot), the presented information may vary. In the example above, the call has been transferred to you by an agent.

2. Click the **Accept** button to support the processing of the transferred call.

4.9 Performing an outbound call

At any time, you can call the person of your choice, whether internal or external to the company. To do this, you must first be logged in with the Push Voice operational status.

4.9.1 Performing an ACD outbound call

You wish to start an ACD outbound call to an internal or external number. In that case, a folder is created and the remote control is visible on your interface.

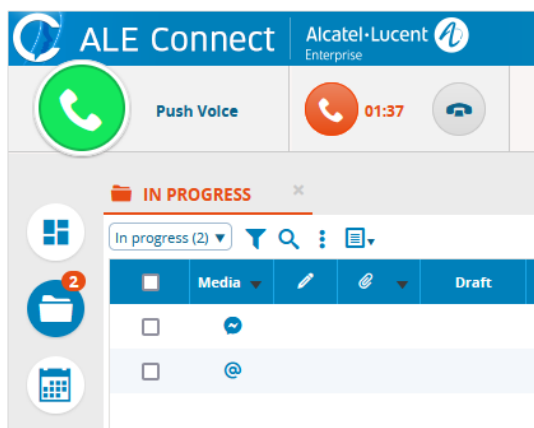
1. Check that your operational status is **Push Voice**.
2. Dial the **phone number** of the person to call on your telephone.
3. When your correspondent picks up, the folder is displayed.
4. When the conversation is over, **hang up your phone** or **click the corresponding button** on the remote control.

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

4.9.2 Performing a 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. Check that your operational status is **Push Voice**.
2. Dial the phone number of the person to call on your phone device.
3. When your correspondent picks up, the remote control is displayed in the banner of 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** on the remote control.

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

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,
- the transfer of internal or external requests,
- a knowledge base including response templates,
- a spell checker,
- response assistance with artificial intelligence,
- grouped processing actions,
- agent response validation workflows,
- HTML templates for responses,
- a customised request qualification.

5.1 Supporting an email

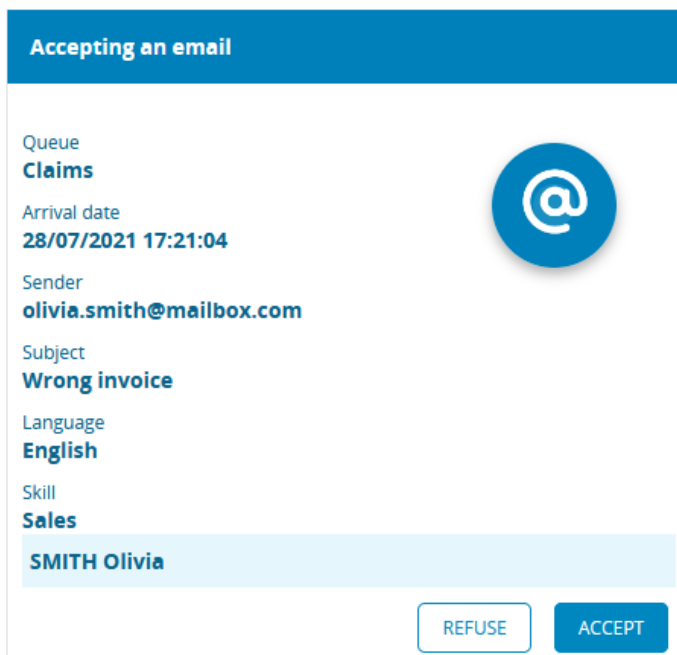
Depending on how emails are received (push or pull), you are not requested in the same way. To process push emails, you must be logged in with a status that allows their processing. To process pull emails, you just need to have rights on queues, skills and languages, and then select the email to be processed.

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:



Accepting an email

Queue
Claims

Arrival date
28/07/2021 17:21:04

Sender
olivia.smith@mailbox.com

Subject
Wrong invoice

Language
English

Skill
Sales

SMITH Olivia

REFUSE **ACCEPT**

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 / 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

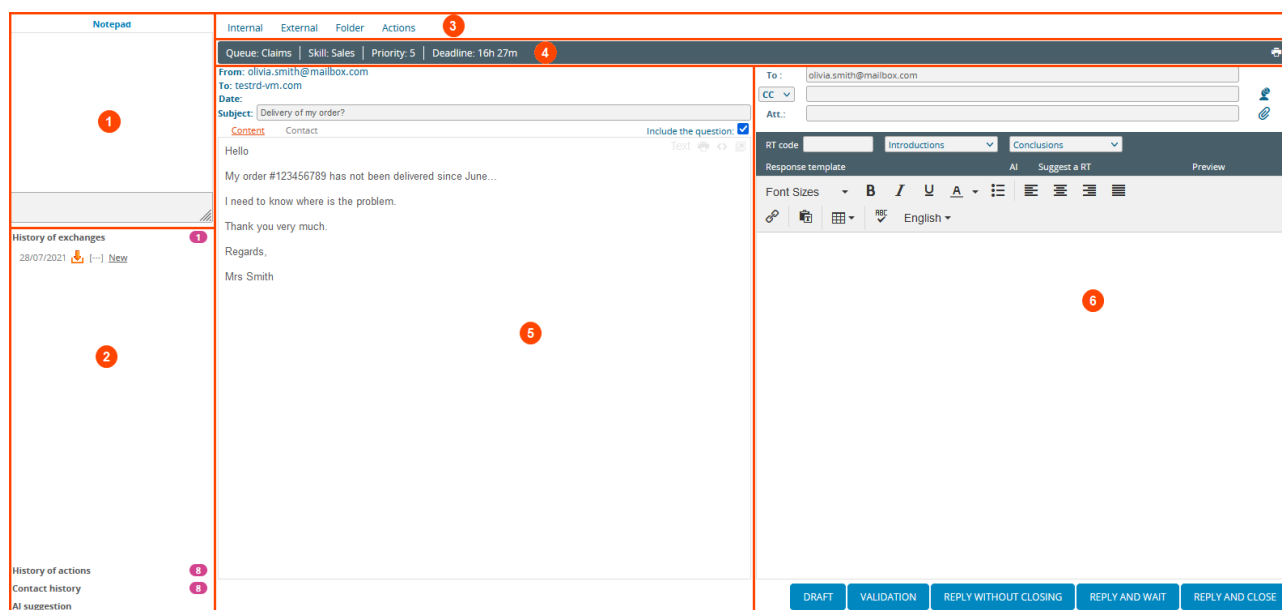
The email arrives directly in the desktop of in progress folders. You have to view this list by yourself to select the email to process.

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 in progress folders, in pull mode.

5.2.1 Overview



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

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

Just below, you can view the **main characteristics** (4) of the folder: its queue, the required skill, the processing priority and the deadline. The  icon allows you to print all of the messages exchanged during the folder processing.

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.
	Prints 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.

The screenshot displays the 'Reply' interface in the Alcatel-Lucent workspace. At the top, there are input fields for 'To:' (containing 'ann.smith@mailbox.com'), 'CC:' (with a dropdown arrow), and 'Att:'. Below these is a dark blue header bar containing 'RT code', two dropdown menus (currently showing 'Introductions' and 'Conclusions'), and buttons for 'Response template', 'AI', 'Suggest a RT', and 'Preview'. A rich text editor toolbar is positioned below the header, featuring options for font size, bold (B), italic (I), underline (U), text color (A), bulleted list, numbered list, indent, and outdent. Additional icons for link, insert, table, and language (ABC, English) are also present. The main text area contains the following draft content:

Dear Mrs Smith
Your order has just been sent to your home.
It will be delivered tomorrow morning.
We apologise for the inconvenience.
Best regards,
Your customer agent

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)**.
3. 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.
4. Add **copy recipients (CC)** and/or **blind copy recipients (BCC)** if necessary.
5. You can either enter them manually, or use the address book by clicking the corresponding button.

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

6. Add any attachments to your reply to support it (form to be filled in, etc.).
7. Write your reply by using the writing help tools.

To : ann.smith@mailbox.com

CC v

Att.:

RT code Introductions Conclusions

Response template AI Suggest a RT Preview

Font Sizes B I U A

Dear Mrs Smith

Your order has just been sent to your home.

It will be delivered tomorrow morning.

We apologise for the inconvenience.

Best regards,

Your customer agent

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.

8. 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 keeps 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.

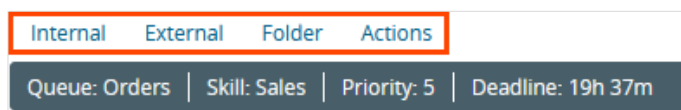
Reply without closing: this action is available only if the interaction depends on a queue in pull mode. It allows you to send a non-final reply to the contact (to make him/her wait for example). The [To be processed \(bis\)](#) status is applied to the folder which remains in the In progress desktop.

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
- Redirect to an external agent
- 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 are particularly recommended to process emails, chats and Facebook Messenger conversations.

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

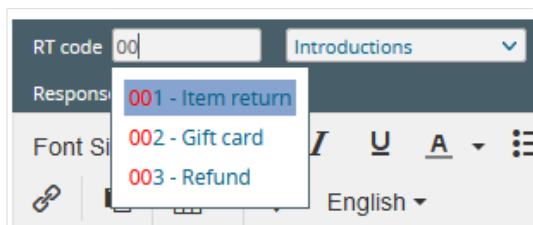
You have 4 possibilities:

- 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:

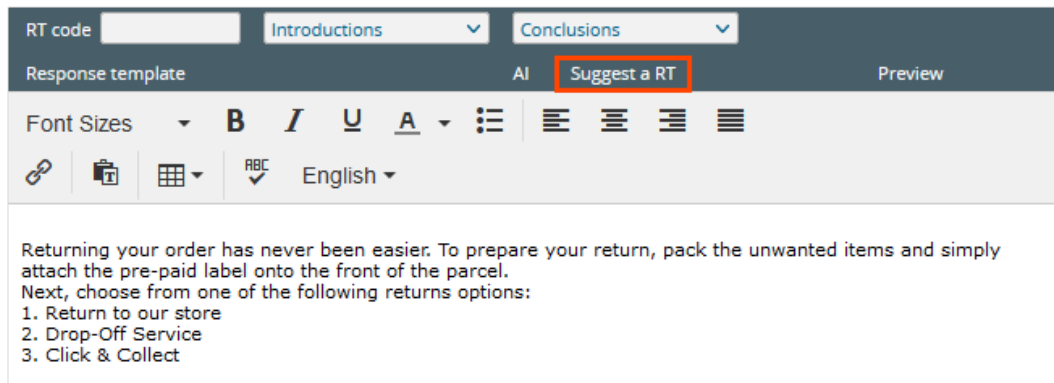
The screenshot shows a user interface for an agent. At the top, there is a dark grey header bar with the word "Suggestions" in white. Below this, a light grey box contains a blue text suggestion: "We offer a full refund (excluding delivery costs) on any items returned to us within 14 days of the delivery date. For your convenience,...". Below the suggestion box is a dark grey bar with the text "RT code" followed by a small white input field. Below that is a large light grey text area where the word "Retu" is partially visible, with a red squiggly line underneath it indicating a search or suggestion. At the bottom right of the interface is a blue button with the word "SEND" in white capital letters.

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

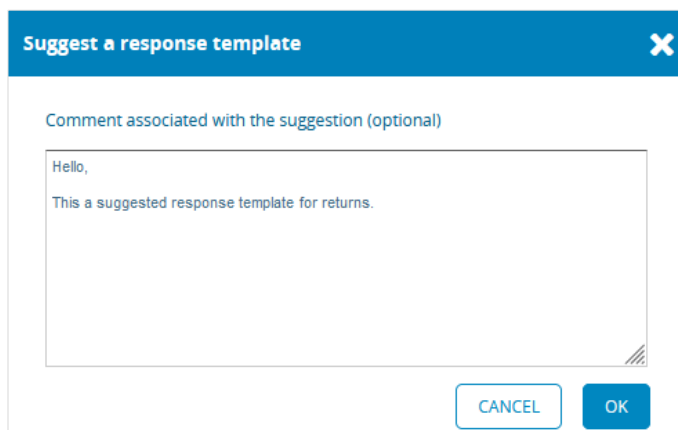
You have noticed that a request is frequently asked and there is no response template for it. You wish to write it and submit it to your supervisor for integration in the knowledge base. This functionality is available when you write an email (spontaneous, reply to a request, etc.).

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



The screenshot shows an email composition window. At the top, there are dropdown menus for 'RT code' (empty), 'Introductions', and 'Conclusions'. Below these is a 'Response template' section with a 'Suggest a RT' button highlighted by a red rectangle. To the right of this button is a 'Preview' button. Below the 'Response template' section is a rich text editor with various formatting options (Font Sizes, Bold, Italic, Underline, Text Color, Bulleted List, Numbered List, Indent, Outdent) and a language dropdown set to 'English'. The email body contains the following text: 'Returning your order has never been easier. To prepare your return, pack the unwanted items and simply attach the pre-paid label onto the front of the parcel. Next, choose from one of the following returns options: 1. Return to our store 2. Drop-Off Service 3. Click & Collect'.

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



The screenshot shows a dialog box titled 'Suggest a response template' with a close button (X) in the top right corner. Inside the dialog, there is a text area labeled 'Comment associated with the suggestion (optional)'. The text area contains the text: 'Hello, This is a suggested response template for returns.' At the bottom of the dialog, there are two buttons: 'CANCEL' and 'OK'.

5. Click **OK**.

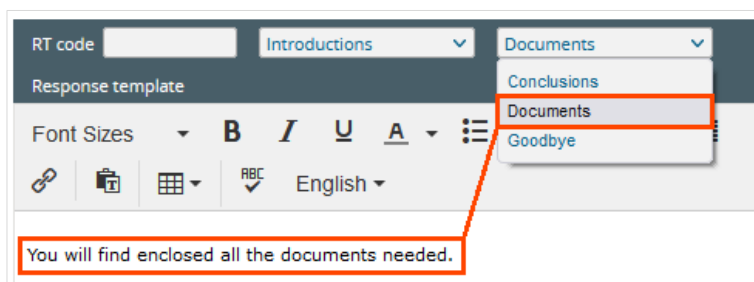
5.5.2 Introduction and conclusion messages

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:

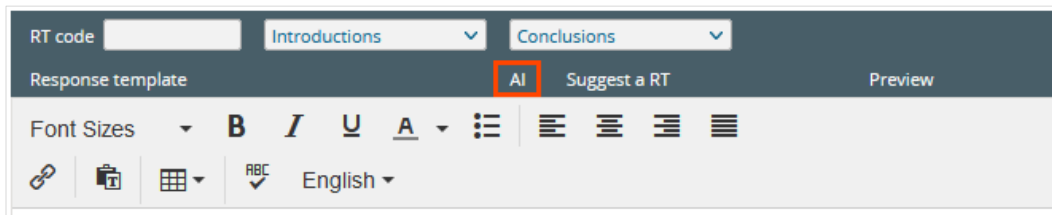
	Firefox	Chrome	Edge	IE
Drag and drop	✓	✓	✓	No
Ctrl + C / Ctrl + V of the file from a directory	✓	No	No	No
Ctrl + C / Ctrl + V of the image from Paint	✓	✓	✓	✓
Ctrl + C / Ctrl + V of the image from the browser*	✓	✓	✓	✓

*Tested from Google Images

5.5.4 Artificial intelligence engine

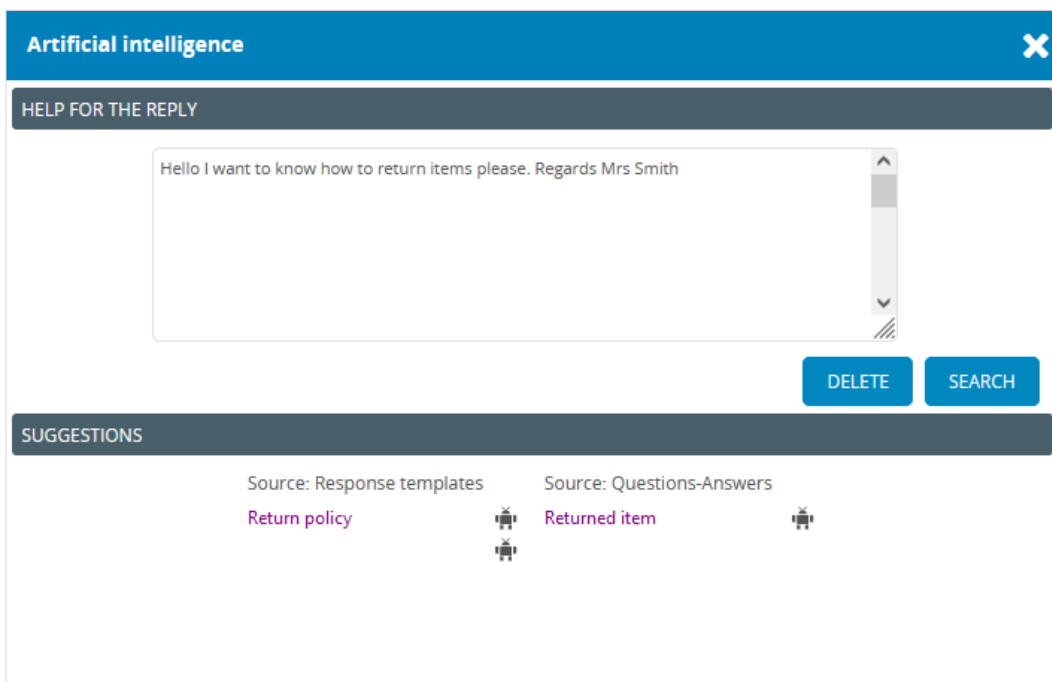
ALE Connect artificial intelligence engine is able to analyse the current request and to suggest the most appropriate response template. Depending on the question asked, it searches the most appropriate answers, in order to use them as a basis for an answer. If these responses are not satisfactory, you 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. The suggestions below have two sources: the response templates from the knowledge base and the questions/answers written by agents, which correspond to more specific cases and punctual issues.

The  icon allows you to search 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.

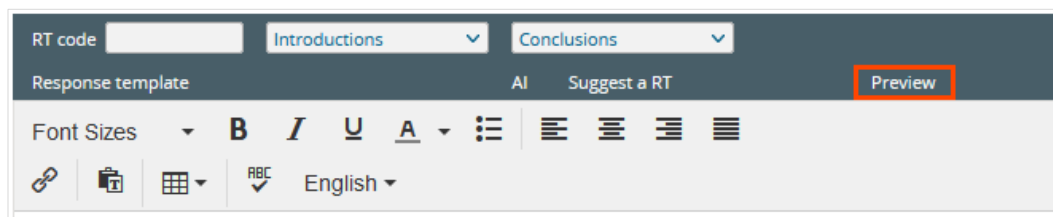
Its text can be readapted, if necessary.

4. Close the window when you have finished.

5.5.5 Preview before sending/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.







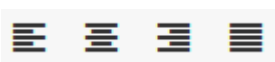




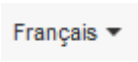
3. Close the window when you have finished.

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

	Choosing the font size.
	Applying bold style.
	Applying italic style.
	Underlining the text.
	Selecting the text colour.
	Inserting bullets in the text.
	Aligning text left, centre, right or justified.
	Inserting or modifying a hypertext link.
	Pasting the clipboard selection as text.
	Inserting a new table.
	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.
	Selecting the 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. All the attachments of a folder (cumulated during the exchanges) are visible in the corresponding widget.

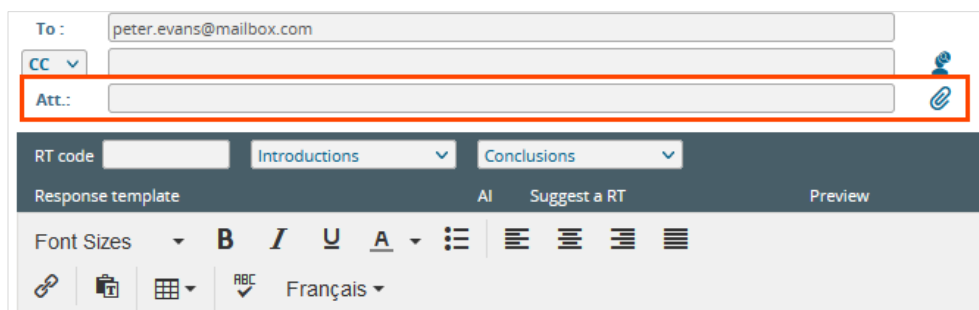
5.7.1 Limits

Attachments are limited in size as follows:

- Maximum size of an attachment: **20 MB**
- Maximum total size of attachments: **30 MB**
- Maximum number of attachments: **100**

5.7.2 Adding attachments

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



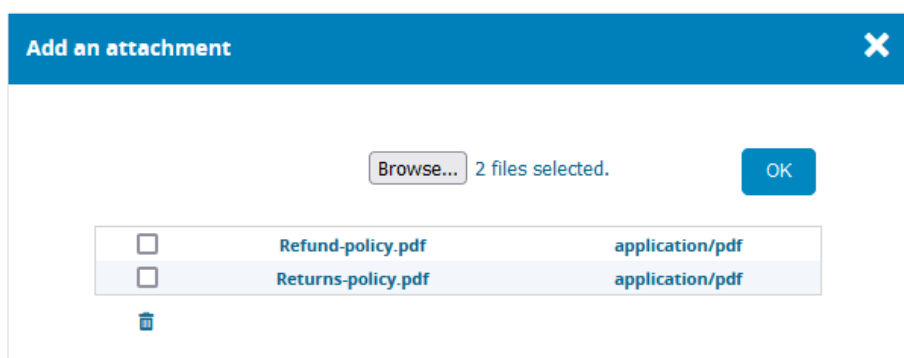
A window is displayed asking you to select files.

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 the **Open** button.
5. Click **Validate** to confirm the action.

ALE Connect adds the selected files as attachments:



6. Close the window when you have finished.

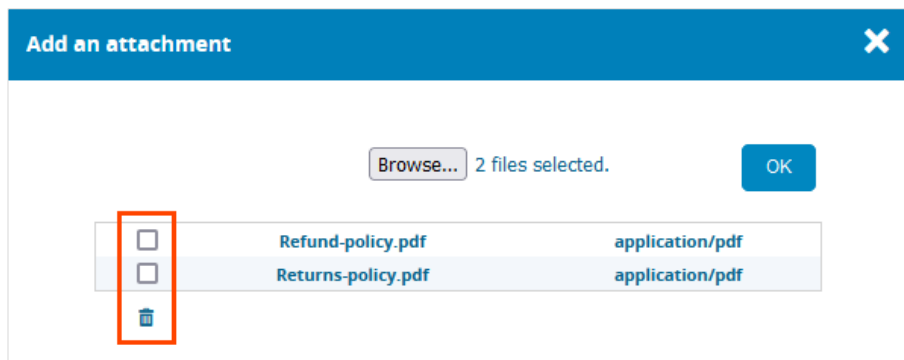
The attachments are displayed in the ATT field.

Att.: Refund-policy.pdf Returns-policy.pdf

5.7.3 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.

Address book

Recipients in copy

CC	BCC
kathy.taylor@external-email.com	

To add a recipient from the address book, select it from the list below...

Name	First name	Email	CC	BCC
TAYLOR	Kathy	kathy.taylor@external-email.com	<input checked="" type="radio"/>	<input type="radio"/>
WILLIAMS	Jack	jwilliams@external-email.com	<input type="radio"/>	<input type="radio"/>

CLOSE

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 semicolon 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).

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

```
àâäëèêëôöùûüÿç
```

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.

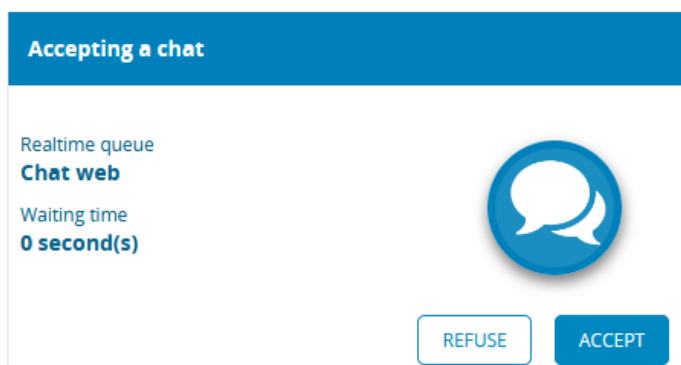
The chat interactions are always distributed in push mode.

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. It corresponds to the total of waiting times spent in the different queues. 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.

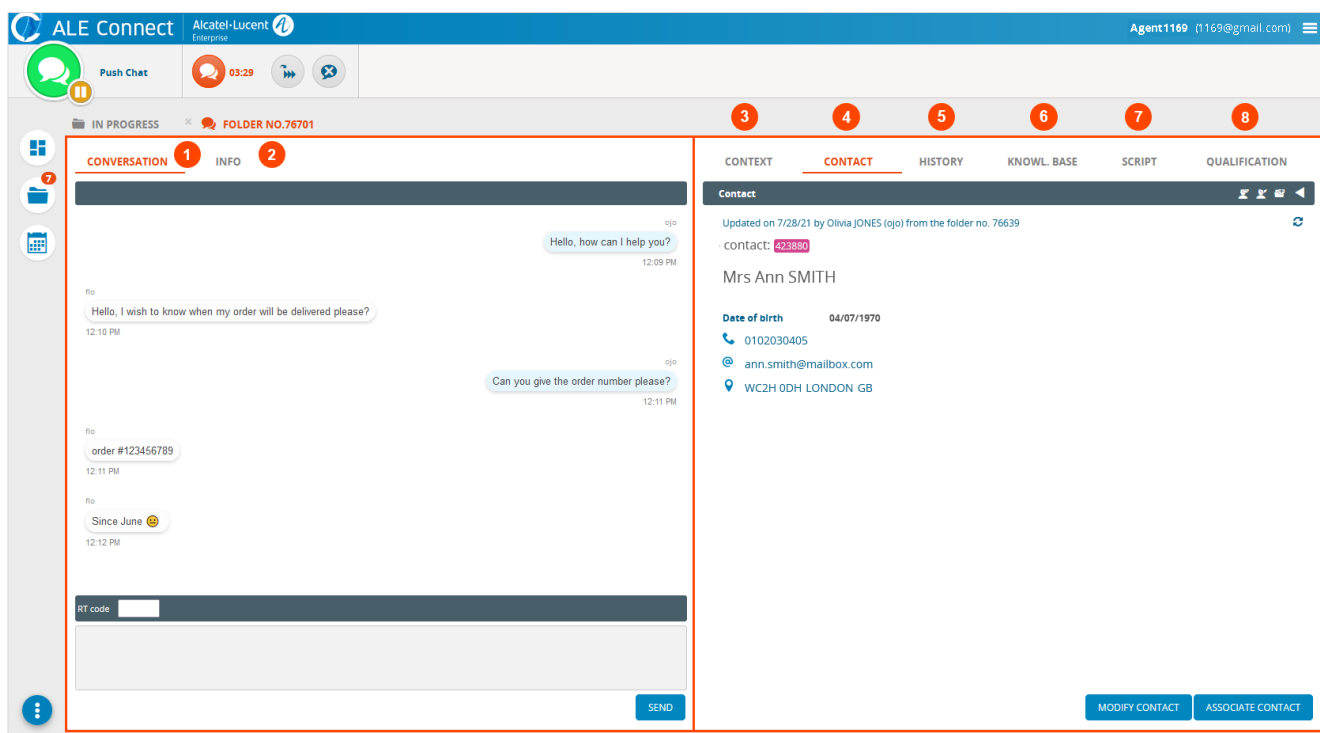
Warning: at the end of a time limit defined by the coordinator, if no agent responds to the web user's request, the web user is dissuaded by the system and his/her chat request is cancelled.

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 <u>Conversation</u> | 5 <u>History</u> |
| 2 <u>Info</u> | 6 <u>Knowledge base</u> |
| 3 <u>Context</u> | 7 <u>Script</u> |
| 4 <u>Contact</u> | 8 <u>Qualification</u> |

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. 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 Webbox, 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 symbolised by the icon .

Context tab

It allows you to view information related to the web user, and the browsing context. This data is automatically provided by the dialogue box (called Webbox) 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](#)

6.2.4 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](#)

6.2.5 History tab

It allows you to view the history of the 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](#)

6.2.6 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 attachment eventually associated with a response template are not displayed.

[Find out more about the tab](#)

6.2.7 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](#)

6.2.8 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).

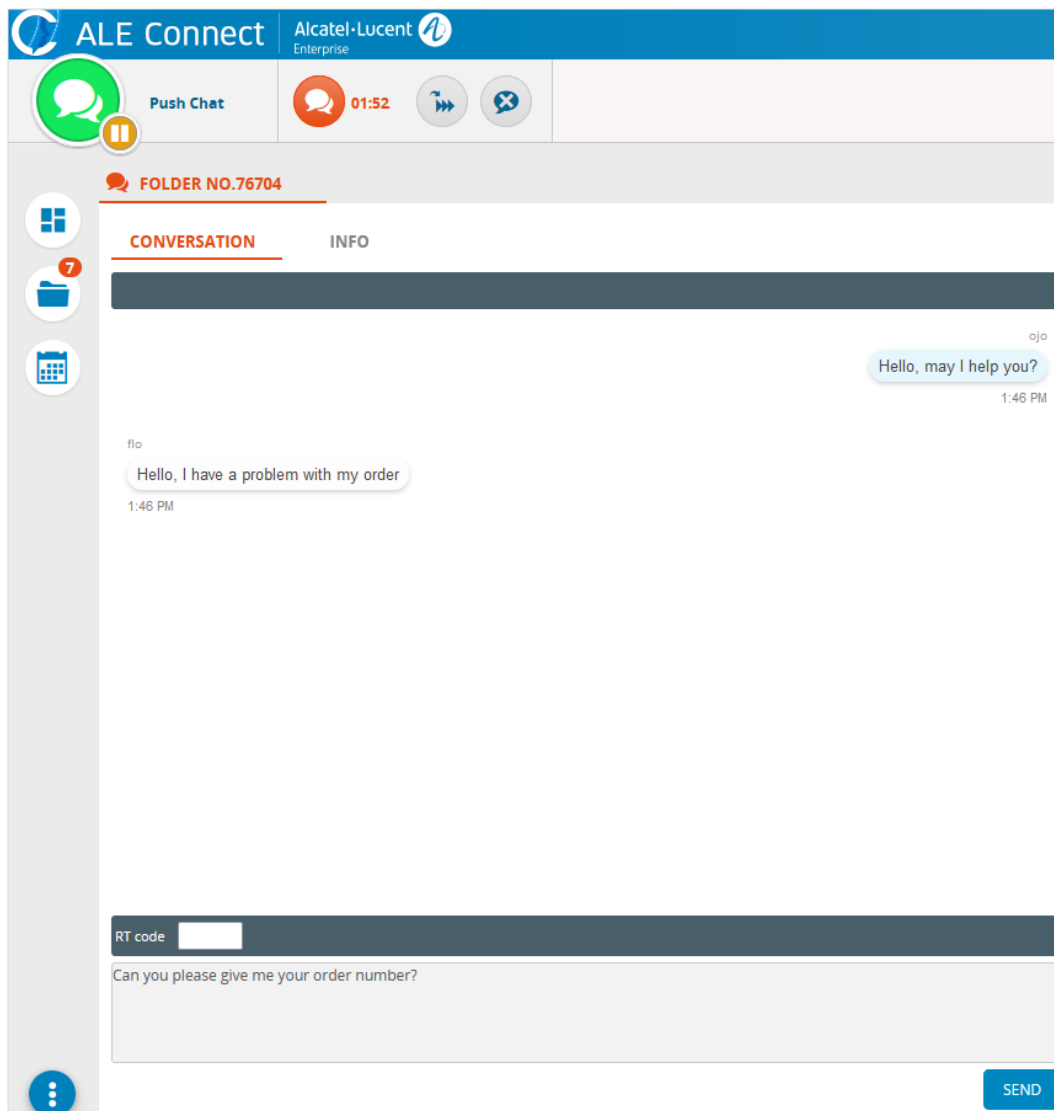
During a chat, you can always perform the following actions:

- 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**.
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 user's request is 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

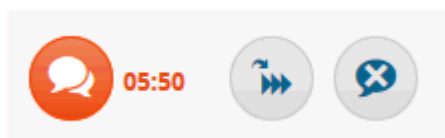
When the web user has not given any news for some time, he/she is warned by a message (which can be customised) that the chat will soon be closed. In addition, a warning is also displayed on your interface for information.





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 control the chat in progress.

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
	<u>Wrap-up</u>	Only when the conversation is over	Countdown of the remaining time to finalise the folder. The duration reserved for this task is set by the platform administrator.
	<u>Requalification</u>	Permanent	Transfers the current chat to another realtime queue.
	<u>End</u>	Permanent	Ends the chat with the web user.

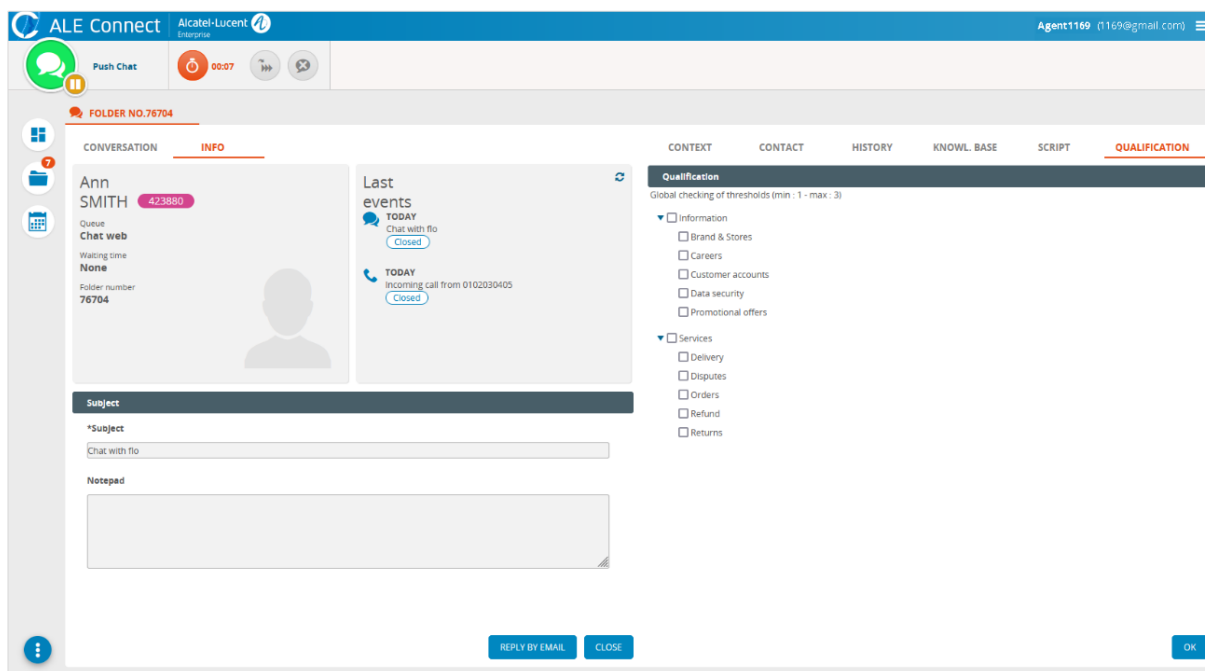
6.5 Ending a chat

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.

6.5.1 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.

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 spontaneous email 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.

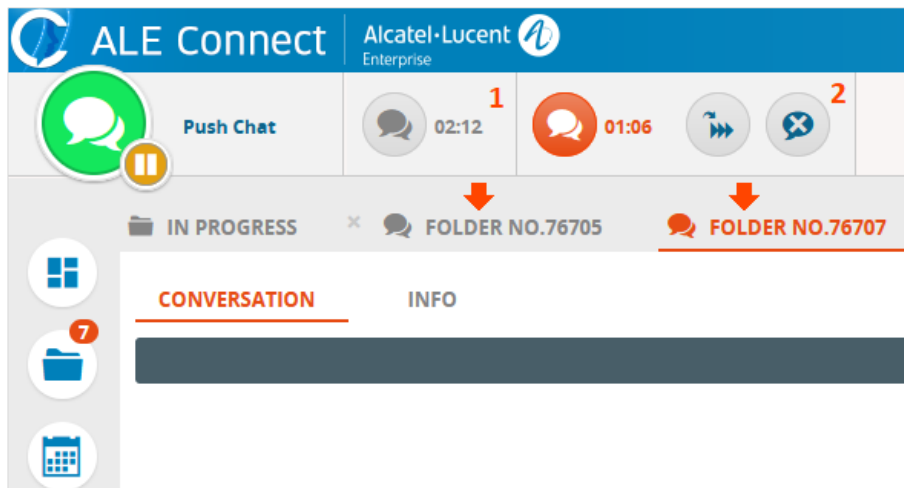
6.5.2 The wrap-up time is over

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.

6.6 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 remote control 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).

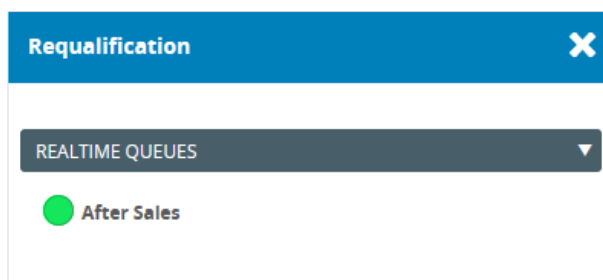
Note: except for the interface, there is no change in the processing of the folder.

6.7 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.

6.8 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.

6.8.1 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.

6.8.2 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.

6.9 In case of logout of the web user

During a chat, the web user may log out 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 logout. The web user can try to relog in via the website dialogue box (known as Webbox) 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 relogin 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 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 an 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.

IN PROGRESS

In progress (7) 🔍 📄 🏠

Display by 18 📅 1-7 on 7 🌐

Media	Draft	Number	Deadline	Origin	Date	Subject	Queue	Skill	Status	Agent	
		76587	1d 22h	maggie.williams@mailbox.com	July 27, 2021	My order 123456789	1	Orders	Sales	To be processed	WINTER
		76588	1d 22h	peter.evans@mailbox.com	July 27, 2021	International delivery	1	Orders	Sales	To be processed	JONES
		76217	9d 21h	Katia Coonrad	July 19, 2021	FB Messenger - 5000000000000...	1	FB Messenger - A...	Sales	To be processed	---

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.

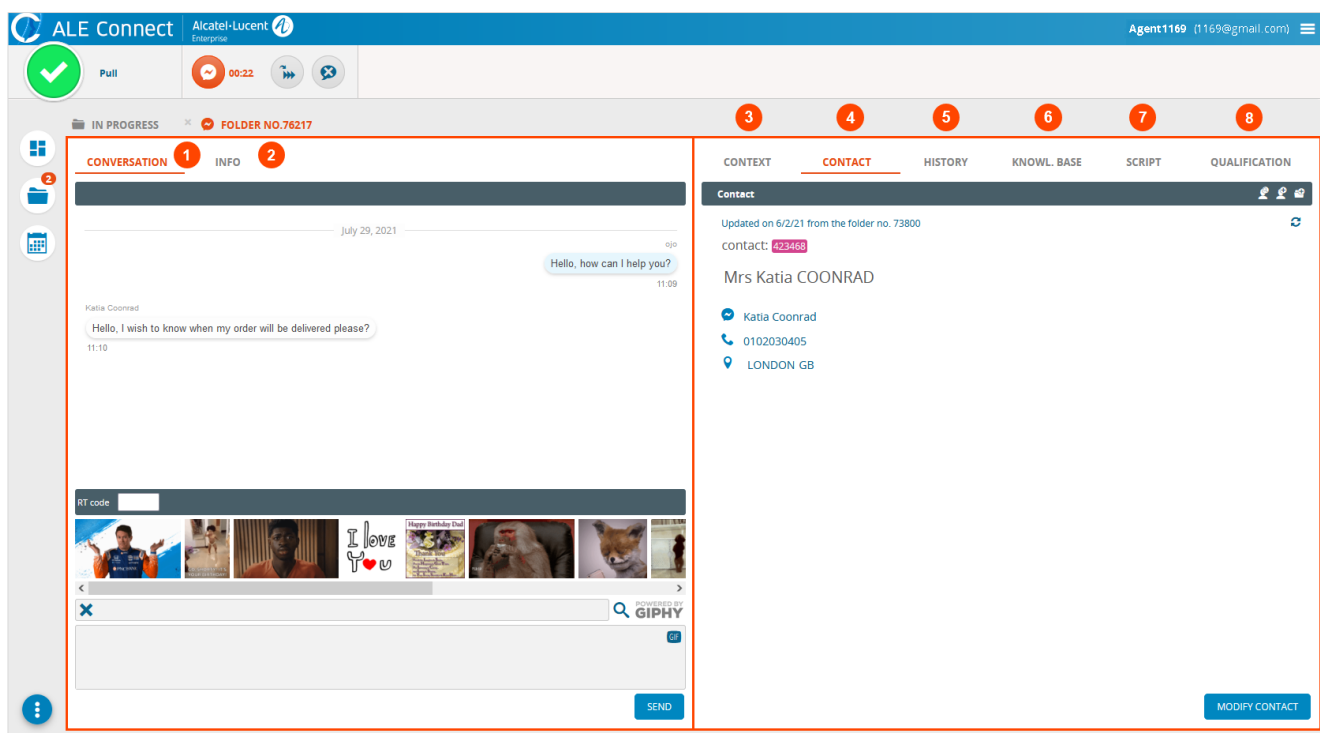
3. Click the Facebook Messenger folder you wish to process.
4. It is opened on screen: you can start its processing.

7.2 Introducing the 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 <u>Conversation</u> | 5 <u>History</u> |
| 2 <u>Info</u> | 6 <u>Knowledge base</u> |
| 3 <u>Context</u> | 7 <u>Script</u> |
| 4 <u>Contact</u> | 8 <u>Qualification</u> |

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 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 **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 drive 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

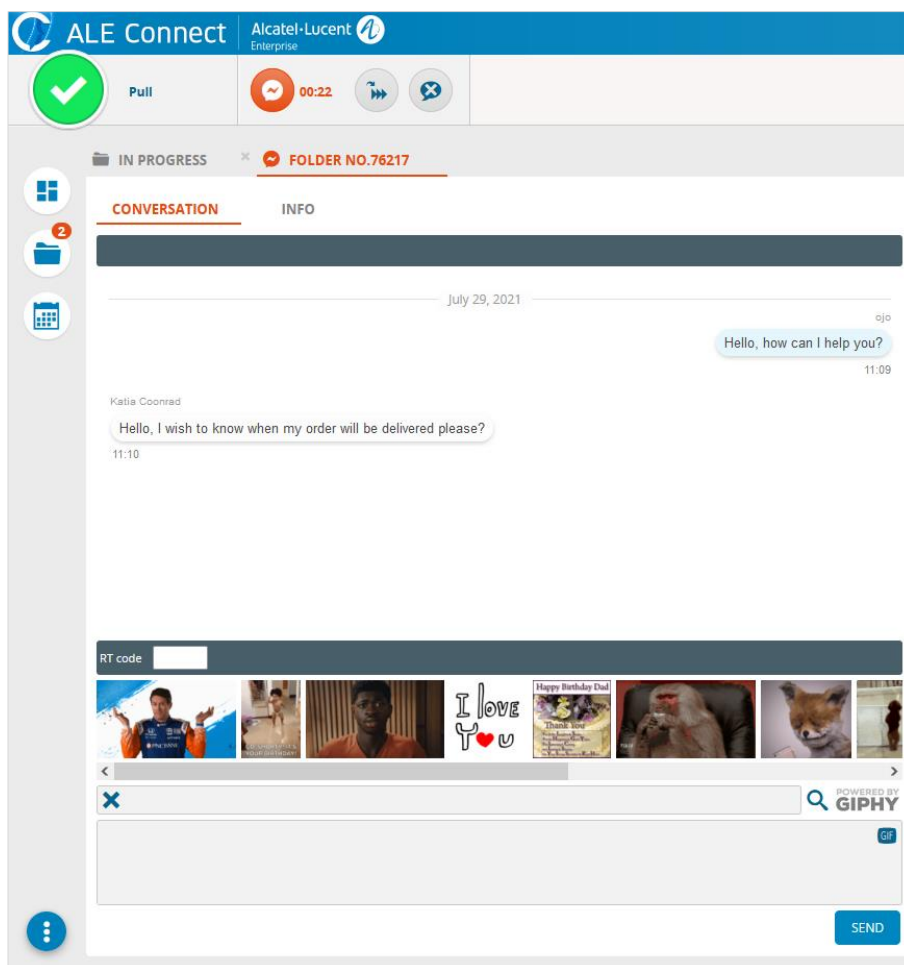
It is possible to qualify the interaction by assigning one or several criteria to it. This tab is displayed only if these qualification criteria have been defined for the queue in which the folder is arrived. Otherwise, it is hidden.

[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 switch to the wrap-up phase. You can now finalise the processing of the folder.

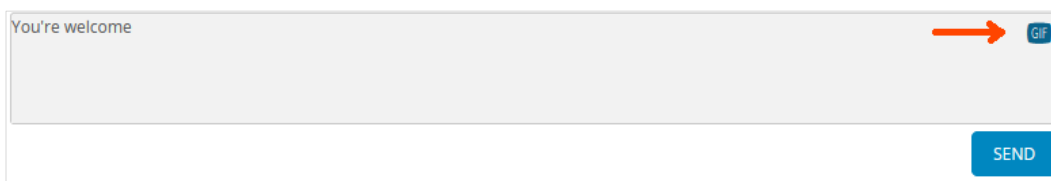
7.4 Inserting animated GIFs

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:



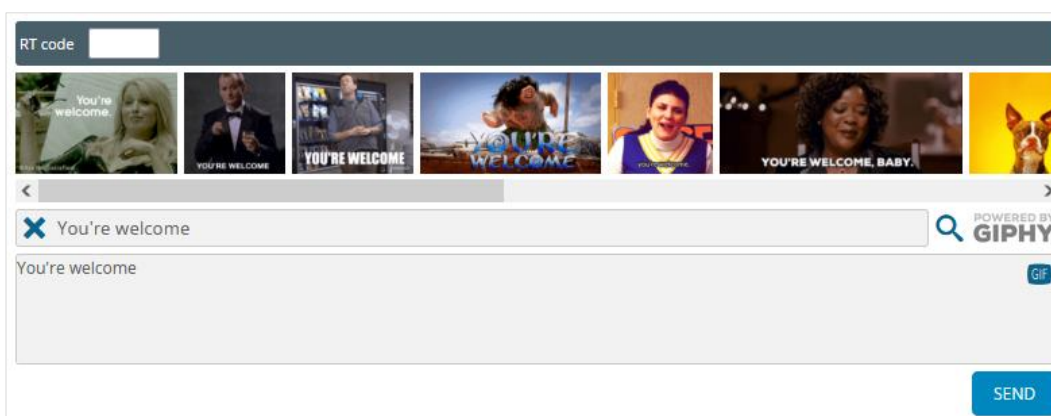
A list of the first 100 results sent back by the GIPHY website is automatically displayed, above the writing area: by default, these are the animated GIFs corresponding to the text of your message.

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 **X** button.

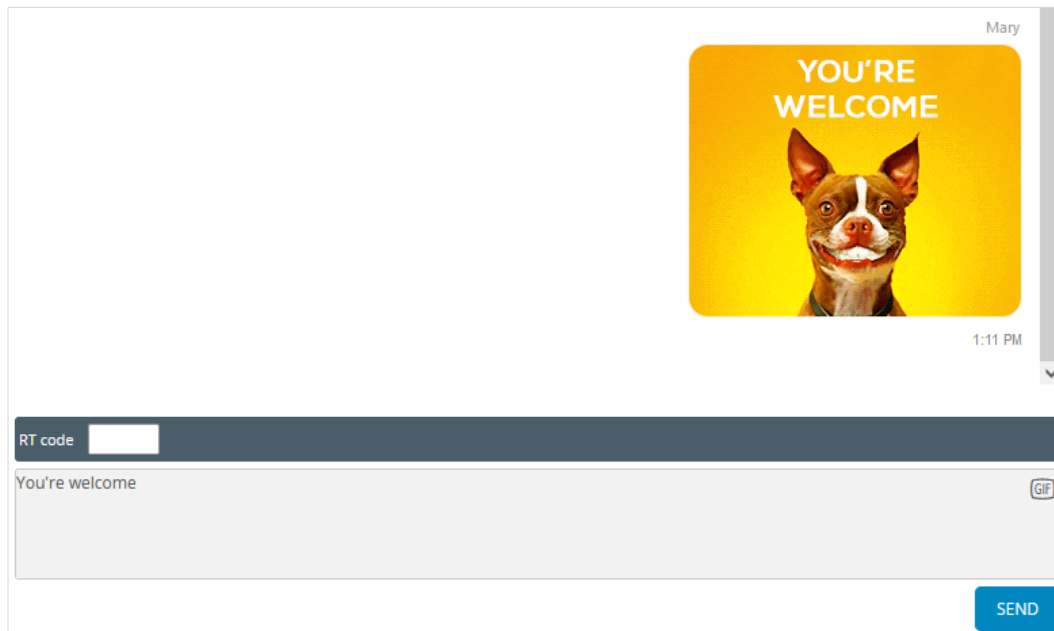
4. Validate your search by clicking the **Magnifying glass** button.

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.

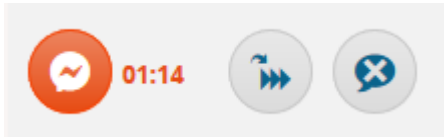






The animated GIF is sent instantly with your message to the web user, who views it in his/her Facebook Messenger interface. The library and search are automatically collapsed.

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.
	<u>Wrap-up</u>	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.
	<u>Requalification</u>	Permanent	Allows to modify the skill associated with the folder.
	<u>End</u>	Permanent	Ends the conversation with the web user.

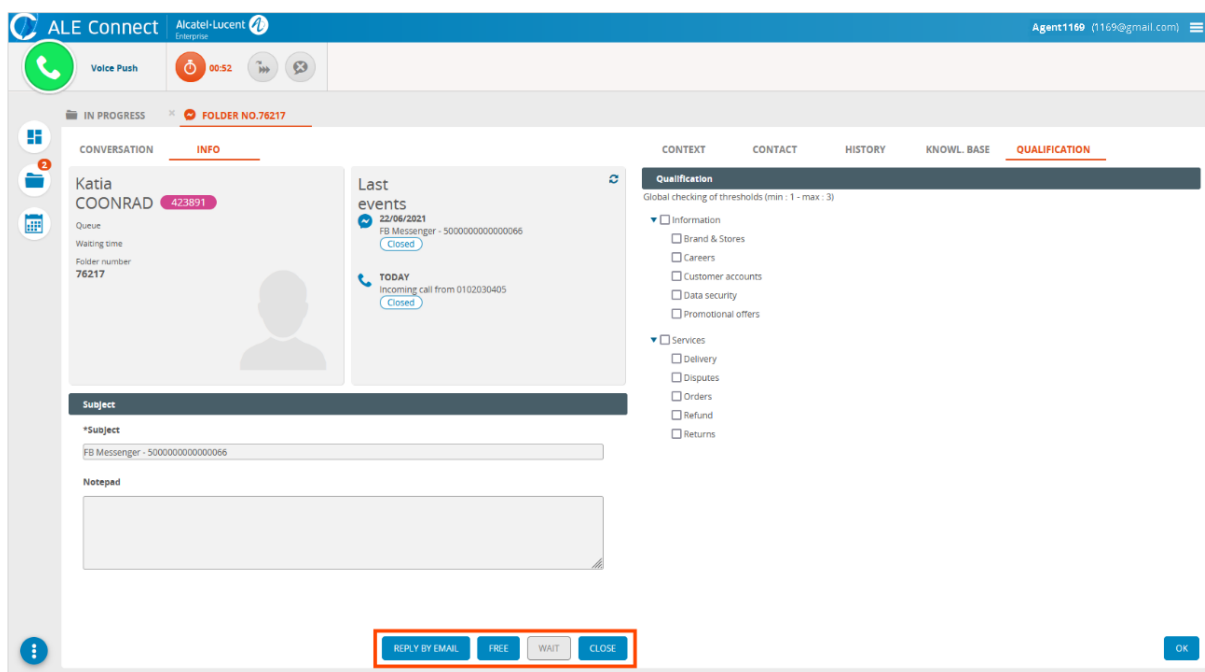
7.6 Ending a Facebook Messenger conversation

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 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.



	M...	Brouillon	Numéro	Délai	!	Origine	Date	Objet
<input type="checkbox"/>	🐦		63791	0m	5	Lea	14:47	Twitter - Lea
<input type="checkbox"/>	@		63790	1m	5		14:47	Article en trop
<input type="checkbox"/>	@		63789	1m	5		14:46	Remboursement ?

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.

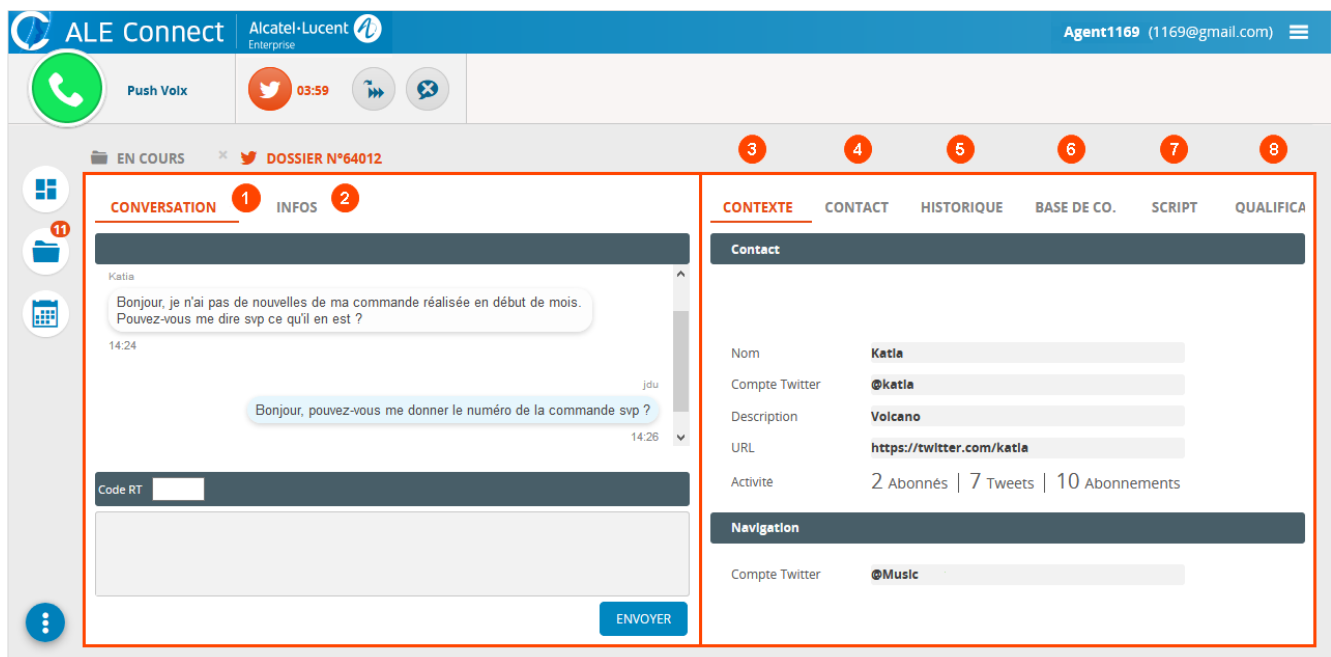
The folder opens on the screen: you can start its processing.

8.2 Introducing the Twitter 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 <u>Conversation</u> | 5 <u>History</u> |
| 2 <u>Info</u> | 6 <u>Knowledge base</u> |
| 3 <u>Context</u> | 7 <u>Script</u> |
| 4 <u>Contact</u> | 8 <u>Qualification</u> |

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 **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 to 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 without associating it to 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 corresponding 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 attachment eventually associated with a response template are not displayed.

[More about this tab](#)

8.2.8 Script tab

It allows you to steer 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](#)

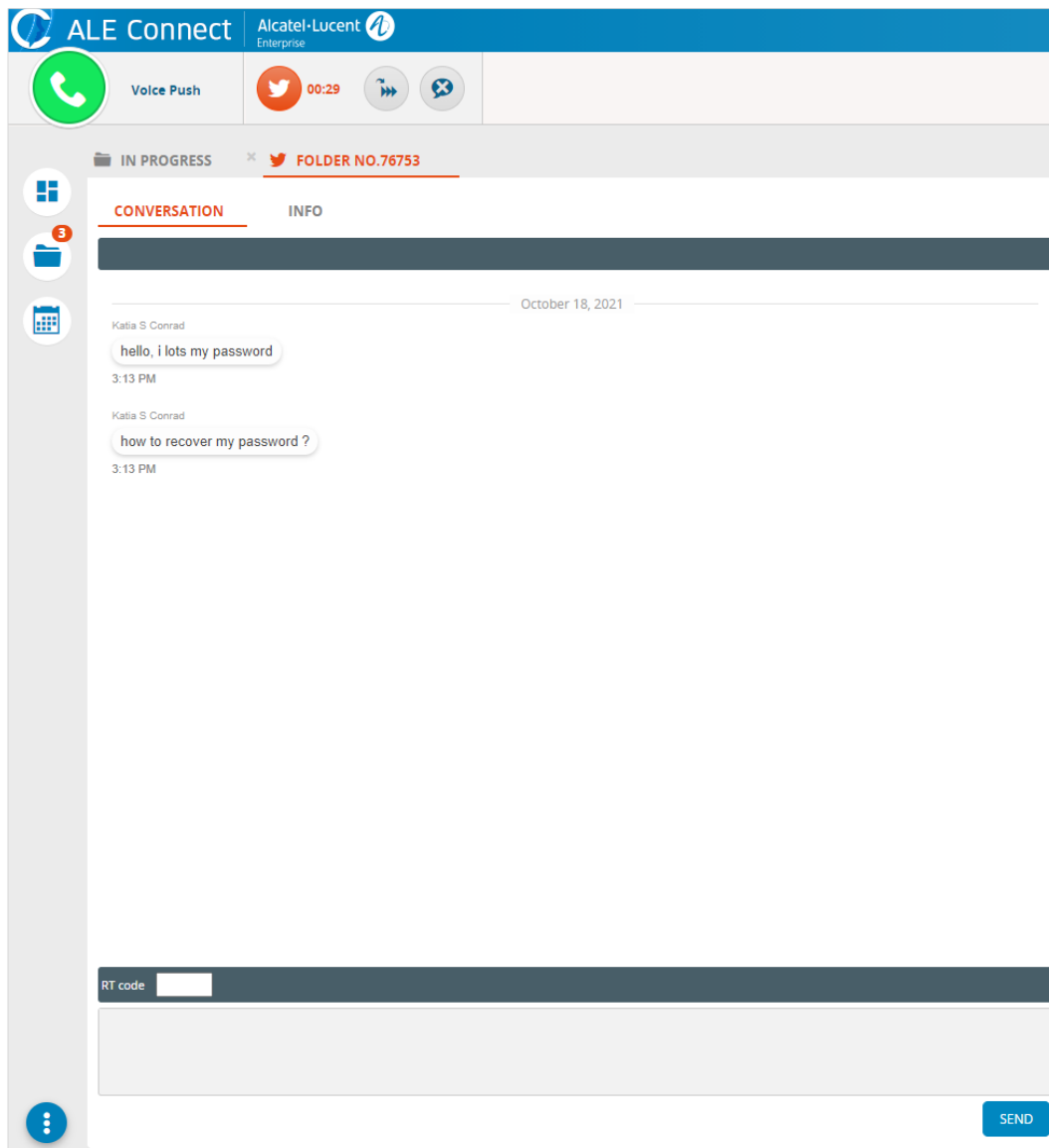
8.3 Processing a Twitter DM conversation

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.

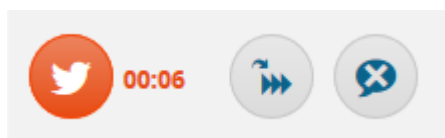
5. The web user replies to your last message.
6. Continue the conversation until the web user's request has been processed.
7. When you have finished, click the **End the conversation** button (✕) from the remote control.





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	Chat duration displayed in real time. The timer starts counting down as soon as you open the folder: when the corresponding tab opens in the workspace. It cannot be paused
	<u>Wrap-up</u>	Only when the conversation is over	Countdown of the remaining time to finalise the folder. The duration reserved for this task is set by the platform administrator.
	<u>Requalification</u>	Permanent	Allows to modify the skill associated with the folder.
	<u>End</u>	Permanent	Ends the conversation with the web user.

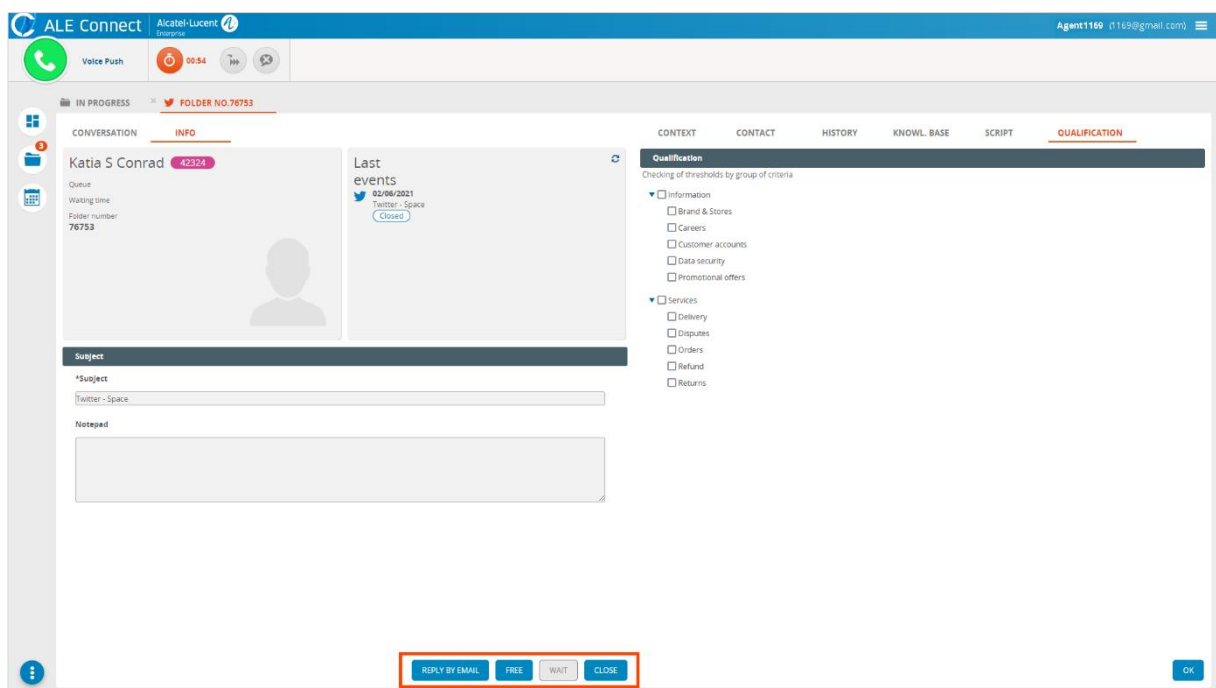
8.5 Ending a Twitter DM conversation

You simply need to click the **End** button (ⓧ) of the remote 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 of the internal desktop

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:

IN PROGRESS x FOLDER CREATION x

CREATION OF A NEW FOLDER FOR A NEW CONTACT :

Email Email - CONTACT FORM - 14

*Select a queue Claims

CONTACT DETAILS

Title Mr

*Last name

*First name

Company

Number

Street

Locality

Building

Postcode

City

Country France

Date of birth

Mobile phone

Home phone

Other phone numbers

Fax

*Email address

CONTACT INFORMATION

Receipt date of the missing document

Contact ID

Contract no.

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, in 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 name of the company, when the contact works for a company.

Number/Street/Locality/Residence/Building

Enter the postal address of the contact, filling in the necessary fields.

Postcode/City

Enter the postcode and the city where the contact lives. ALE Connect does not perform any consistency checks between the postcode and the city entered.

Country

Select, in 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 using the 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.

Contract no.

Enter the contract number associated with the contact, if the contact has one.


Subscriber reference

Enter the contact's subscriber number, if the contact has one.

Order no.

Enter the order number associated with this folder.

Comment

This field allows you to enter a free comment, if necessary. 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, 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. 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 assignment 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**.

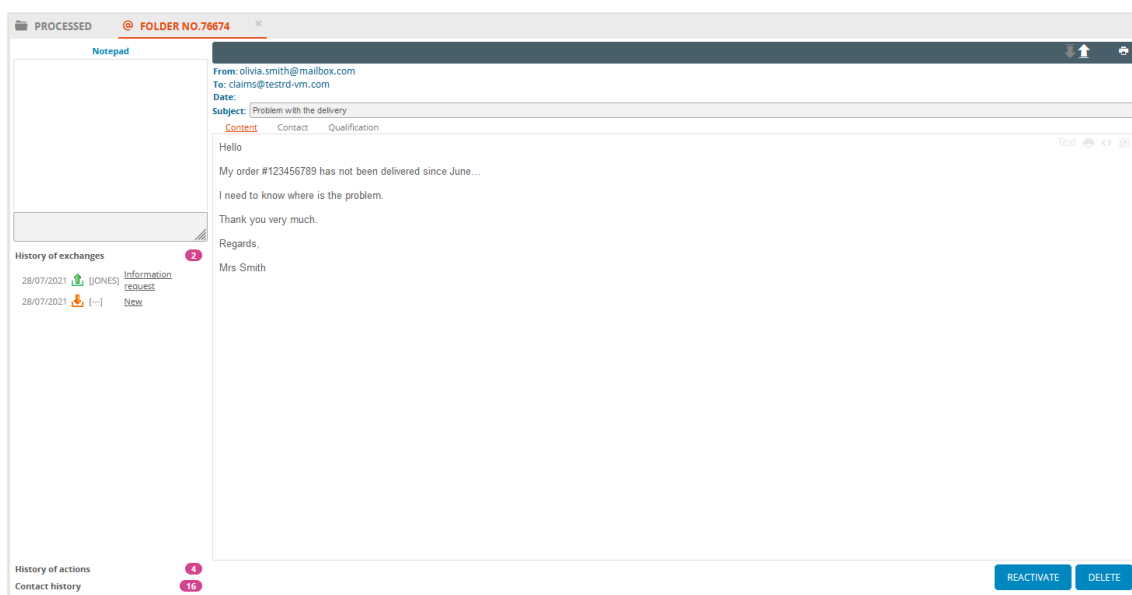
ALE Connect creates immediately the folder.

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 Statuses of an internal folder

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 an internal folder, detailed by desktop.

	Queue	Skill	Status	Agent
1	Orders	Sales	To be processed	----
1	Claims	Sales	To be processed	JONES
1	Orders	Sales	To be processed	----
1	Orders	Sales	To be processed	JONES
1	Orders	Sales	Validation refuse	JONES
1	Orders	Sales	To be processed	JONES
1	Orders	Sales	To be processed	WINTER

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)
Being proc.	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: <ul style="list-style-type: none">- 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	<p>This status is assigned to the folder when the contact's request is considered as satisfied.</p> <p>It is therefore assigned to the folder when:</p> <ul style="list-style-type: none"> - 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 (transfer)	The folder has been permanently transferred to one or several recipients to be processed outside ALE Connect. The transfer 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 Actions on the list

9.4.1 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
- the assigned agent
- a column

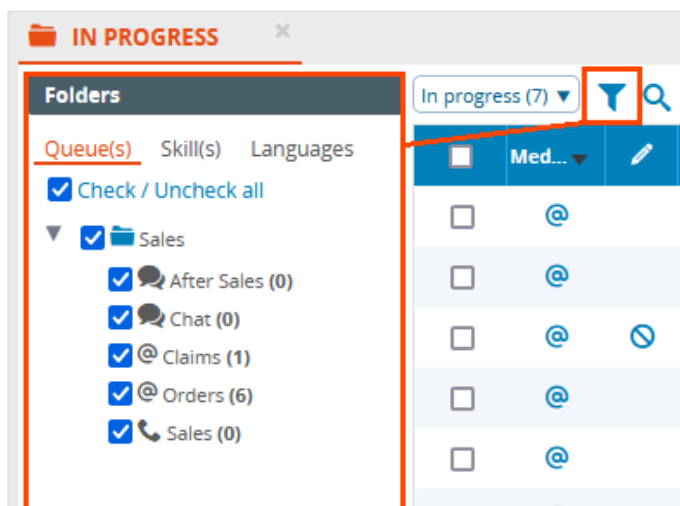
ALE Connect then displays only the list of folders that match the applied filters, whatever the desktop.

Warning: the filters can be cumulated.

9.4.1.1 According to queues

A queue is a series 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.

1. Click the **List of folders** button (📁).
2. Select a desktop: the list of corresponding folders is displayed.
3. Click the **Folders** button (🔍) 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.

9.4.1.2 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.

9.4.1.3 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.

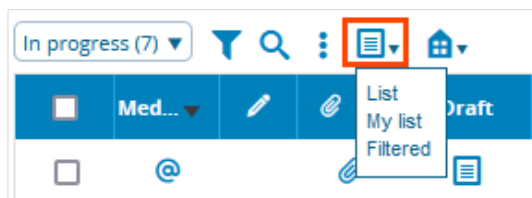
9.4.1.4 According to the agent assigned

As an agent, you may not want to view the folders of all the collaborators in the contact centre, but only your own folders. In addition, the list of folders which have not been assigned yet to an agent can be long. Finally, using the browsing buttons to scroll the different pages can quickly become tedious.

That is why it is possible to restrict the display of folders only to those of the logged in user.

Warning: this filter is cumulated with the other filters already applied according to queues, skills and/or languages.

1. Click the **List of folders** button (📁).
2. Select a desktop: the list of corresponding folders is displayed.
3. Click the **Filtered** button (📋) located above the list, and then choose a **display mode**:



List: no filter is applied on the list (default option). All the folders are displayed.

Filtered: only the folders assigned to the logged in agent and those without assignment are displayed. Folders assigned to other agents are hidden.

My list: same as **Filtered** option, but the number of unassigned folders is reduced according to a parameter (defined by the coordinator).

Example: if the coordinator has set up a display restriction to 3 folders, only 3 unassigned folders with the most urgent priority will be displayed in the desktop (in addition to the folders assigned to the same agent).

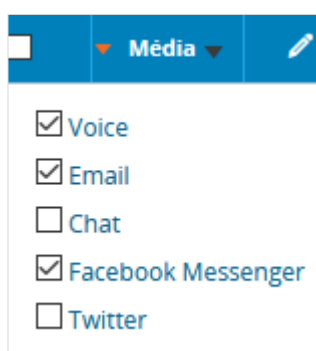
Once you have made your choice, the list of folders is immediately updated.

9.4.1.5 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.

9.4.2 Searching folders

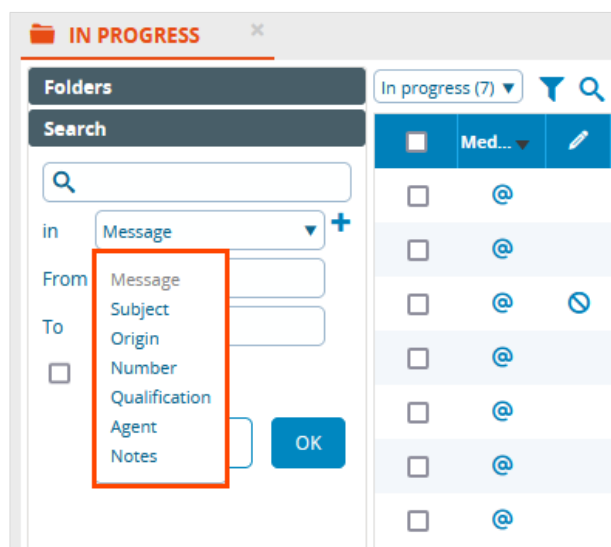
The ALE Connect engine allows you to search folders in any desktop of your choice, according to precise criteria (period, agent, etc.).

Warning: the maximum number of results is set up by default to 10,000 folders (configurable). When it is higher than the defined limit, no result is displayed. ALE Connect informs you of the failure and invites you to refine your search.

9.4.2.1 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 whose 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. 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.

9.4.2.2 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**

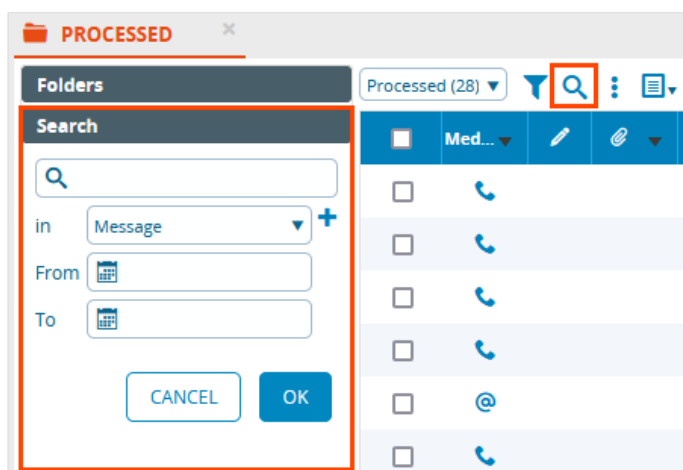
- Searches strictly the entered character string among all agents associated with the folder.
- The search is performed in two steps: it identifies the agent(s) corresponding to the entered text, and then finds the folders associated with this/these agent(s).
- If several agents are found, the folders 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.

9.4.2.3 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.
4. A vertical pane is displayed on the left of your workspace:



5. Select a search criterion in the choice list.
6. In the 🔍 field, type the **character string** to search, respecting the entry rules.
7. 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.

8. 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.

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

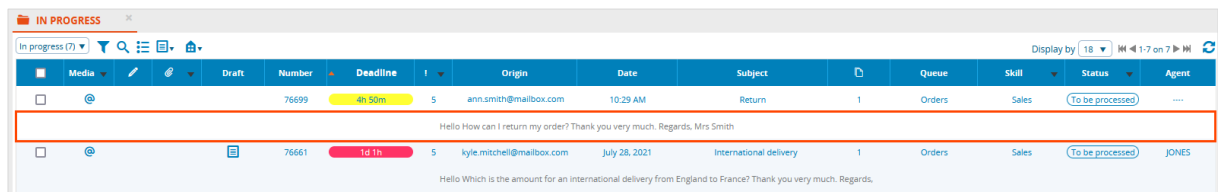
ALE Connect immediately launches the search and displays a list of corresponding folders. Otherwise, if no folder has been found, the list is empty. If one of the entry rules has not been followed, an error message is displayed and informs you.




9.4.3 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 presents both the last message sent by the contact (only the first 5 lines) and the last saved note. These elements allow you to quickly know the purpose of each folder, without opening 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:



	Media	Draft	Number	Deadline	Origin	Date	Subject	Queue	Skill	Status	Agent
<input type="checkbox"/>			76699	4h 50m	ahn.smith@mailbox.com	10:29 AM	Return	1	Orders	Sales	To be processed
Hello How can I return my order? Thank you very much. Regards, Mrs Smith											
<input type="checkbox"/>			76661	1d 1h	kyle.mitchell@mailbox.com	July 28, 2021	International delivery	1	Orders	Sales	To be processed JONES
Hello Which is the amount for an international delivery from England to France? Thank you very much. Regards,											

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

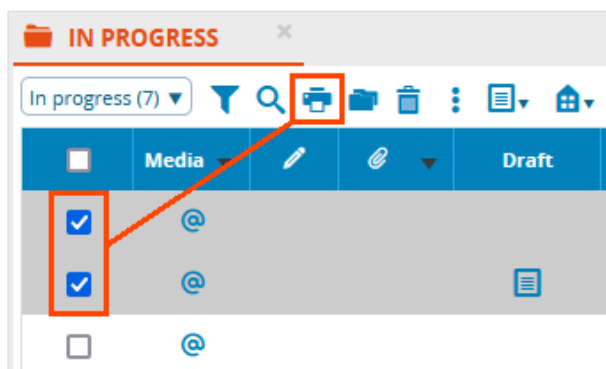
9.4.4 Printing folders

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:



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

9.4.5 Grouping folders for simultaneous action

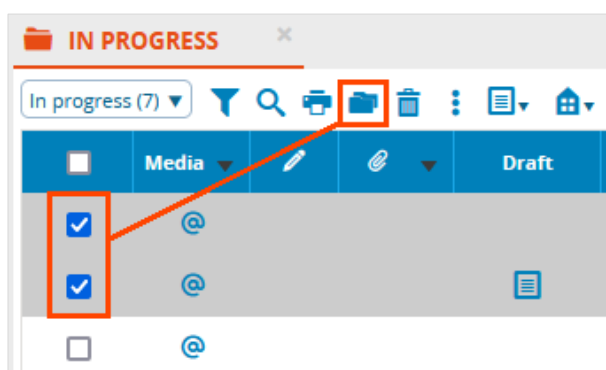
To optimise your work, you can perform a simultaneous action on a set of folders in progress (from the internal or external desktop). The benefit of this grouping is that it allows you to reply to a selection of folders, instead of processing them one by one. ALE Connect then initiates the requested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

9.4.5.1 Internal folders

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 (*)

Free

Redirect to a skill (*)

Process

Merge(*)

To be processed by another agent

Redirect to a queue (*)

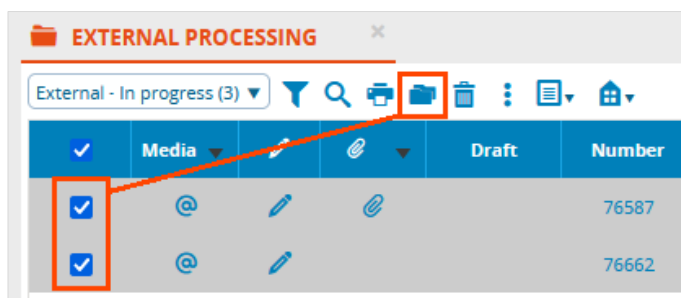
To expert

Reserve

To external agent

9.4.5.2 External folders

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




6. Select the action to perform on the grouped folders:
Archive (*)
Reactivate(*)
Remind the external agent

9.4.6 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.

9.4.6.1 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.

9.4.6.2 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.

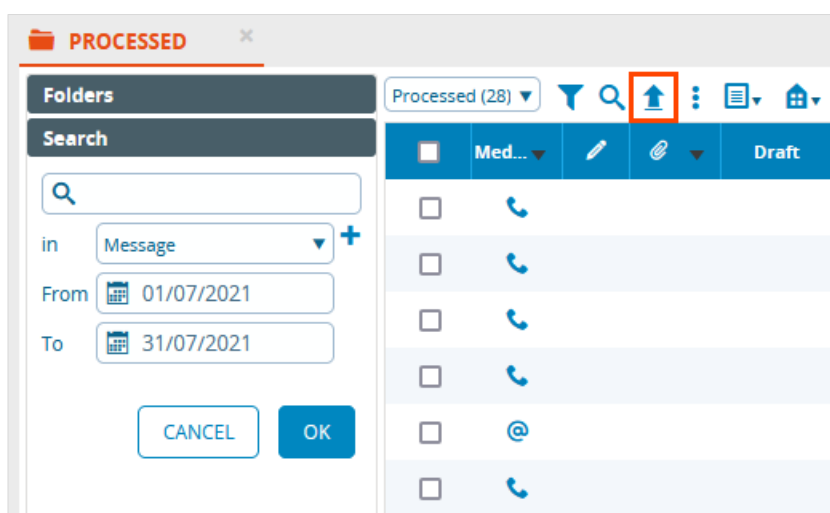
9.4.7 Exporting email addresses

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 collect it and use the contained data.

9.4.8 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.

9.4.8.1 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

9.4.8.2 Consequences of the merge

Following the merge, the interactions of the child folder(s) are attached to the parent folder. However, the child files are deleted.

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 **username** (in brackets) who performed the action.

9.4.8.3 In one grouped action

This action merges several grouped folders, from the In progress internal desktop into a single folder, outside of an interaction.

1. Click the **List of folders** button (📁).
2. Select the desktop for which you wish to merge folders: the corresponding list is displayed.
3. If necessary, perform a folder search to find the ones you are interested in.
4. Check the boxes corresponding to the folders to merge.
5. Click the **Group** button (📁).
6. Select the **Merge** action.

The following window is displayed:

Media	Draft	Number	Deadline	Origin	Date	Subject	Queue	Skill	Status	Agent	
@	<input type="checkbox"/>	76589	2d	ann.smith@mail...	July 27, 2021	International delivery	1	Orders	Sales	Grouped	JONES
@	<input type="checkbox"/>	76675	23h 38m	ann.smith@mail...	July 28, 2021	International delivery	1	Claims	Sales	Grouped	JONES

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

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

9.4.8.4 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.

9.5 During the processing

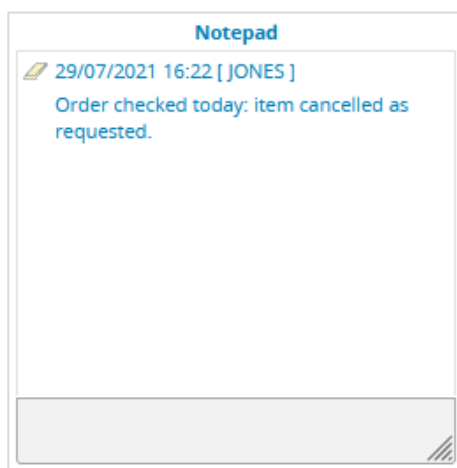
9.5.1 Notepad

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, or when the folder has been transferred to an external agent. These particular notes cannot be deleted.

9.5.1.1 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.

9.5.1.2 *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.

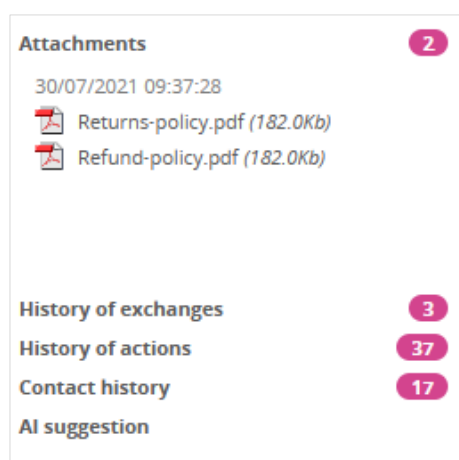
Warning: supervisors have the right to delete notes created by their agents.

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.

9.5.2 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:



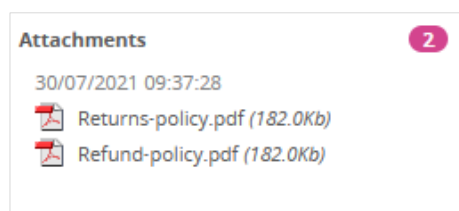
To view a specific widget, click its name. The number of elements affected is given for information.

9.5.2.1 Available widgets

- [Attachments](#)
- [History of exchanges](#)
- [History of actions](#)
- [Contact history](#)
- [AI suggestion](#)

9.5.2.2 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.

9.5.2.3 History of exchanges

This widget lists all the exchanges that occurred during the processing of the folder:

History of exchanges				3
30/07/2021		[...]	Contact reply	
30/07/2021		[JONES]	Information request	
27/07/2021		[...]	New	

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.

9.5.2.4 History of actions

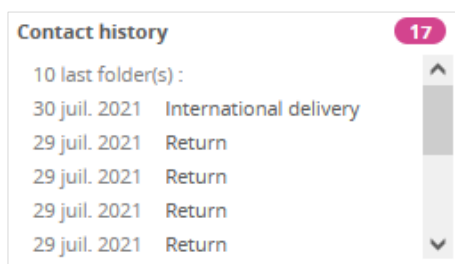
This widget systematically traces all the actions performed on the folder, without exception, whether they were performed manually by an agent or generated automatically by the system. It is useful when you need to perform a search, or if you want to read the folder.



The widget details, for each action performed, its date and the name of the person who performed it.

9.5.2.5 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. However, the number in red indicates the total number of contacts in the history.



By clicking the link of a folder, the detailed history of the contact's exchanges and folders are displayed.

9.5.2.6 AI suggestions

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.

9.5.3 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.

9.5.3.1 Chat folder

ALE Connect retrieves some data provided by the Webbox, 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.

CONTEXT	CONTACT	KNOWL. BASE	SCRIPT	QUALIFICATION
Contact				
Last name	SMITH			
First name	Ann			
Email address				
Contact reference	123456789			
Browsing				
Page title	Web Box			
Page URL	https://testrd/tenant_doc/example/Index.html			

The **Contact** section displays by default the following data if they have 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 client web site.

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.

9.5.3.2 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.


CONTEXT	CONTACT	HISTORY	KNOWL. BASE	QUALIFICATION
Contact				
Last name	Coonrad			
First name	Katla			
Browsing				
Page title	500000000000			

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.

9.5.3.3 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.

CONTEXT	CONTACT	HISTORY	KNOWL. BASE	QUALIFICATION
Contact				
				
Last name	Katla S Conrad			
Twitter account	@katla			
Description	Volcano			
URL	https://twitter.com/katla			
Activity	2 Followers Tweets 14 Subscriptions			
Browsing				
Twitter account	@SpaceTravel			

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.

9.5.4 Folder's contact

When processing a folder, displayed by default on the right of the workspace, the **Contact** tab allows you to identify immediately who initiated the interaction.

9.5.4.1 The contact exists in the database

ALE Connect displays the contact's personal information, extracted from his/her sheet.

CONTEXT **CONTACT** KNOWL. BASE SCRIPT QUALIFICATION

Contact

Updated on 7/30/21 by Olivia JONES (ojo) from the folder no. 76704

contact: 423880

Mrs Ann SMITH

Date of birth 04/07/1970

0102030405

ann.smith@mailbox.com

WC2H 0DH LONDON GB

When the contact has an email address, it is displayed in the **Origin** column of the email or chat folder. 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

9.5.4.2 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.

9.5.4.3 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.

The screenshot shows a web interface for managing folders and contacts. At the top, there are tabs: 'Return', 'nal', 'External', 'Folder', and 'Actions'. Below these, a header bar displays 'Queue: Claims | Skill: Sales | Priority: 5 | Deadline: 1 d 16h'. The main content area shows email details: 'From: olivia.smith@mailbox.com', 'To: testrd-vm.com', 'Date:', and 'Subject: Return'. Below the email details, there are two tabs: 'Content' and 'Contact'. The 'Contact' tab is selected. Under the 'Contact' tab, there are two links: 'Modify the assignment' (highlighted with a red box) and 'Modify details'. Below these links, it says 'Updated on 7/30/21 by Olivia JONES (ojo) from the folder no. 76704'. The contact information is displayed as 'contact: 423880'. Below this, the name 'Mrs Olivia SMITH' is shown. At the bottom, there are several fields: 'Date of birth' (04/07/1970), a phone number (+440123456789), an email address (olivia.smith@mailbox.com), and a location (WC2H 0DH LONDON GB).

ALE Connect automatically suggests the contacts from the database that might match the folder (by comparing the folder data with the contact data):

Internal

External

Folder

Actions

Queue: Orders | Skill: Sales | Priority: 5 | Deadline: 17h 0m

From: olivia.smith@mailbox.com

To: testrd-vm.com

Date:

Subject: Return

Content

Contact

Include the question: ☒

Contact duplicate

Title	First name	Last name
Mrs	Ann	SMITH

Contact ID:

CANCEL

OK

CREATE CONTACT

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**.

9.5.5 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: the history may show folders that you cannot access from the in progress or processed desktops. This happens when the coordinator has only given you read rights on a queue with the *Folders not visible* attribute.

9.5.5.1 Voice, Chat or Facebook Messenger 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.

The screenshot displays the 'History' tab in the ALE Connect interface. On the left, a sidebar shows 'Last events' with three chat entries from 'YESTERDAY'. The main area features a table titled 'Folder (10)' with the following data:

Date	Folder	Media	Subject	Status
30/07/2021	76736	Chat	Chat with Ann	In progress
29/07/2021	76704	Chat	Chat with Ann	Closed
29/07/2021	76702	Chat	Chat with Ann	Closed
29/07/2021	76701	Chat	Chat with Ann	Closed
29/07/2021	76679	Call	Incoming call from 0102030405	Closed
29/07/2021	76676	Call	Incoming call from 0102030405	Closed
28/07/2021	76675	Email	a.smith@mailbox.com	In progress

Below the table, a 'Detail (1)' section shows a timeline for folder 76675: '29/07/2021 - 09:28:26 UTC+2 - New call - Incoming call from 0102030405 - Processed by Olivia JONES (ojo)'. A 'CONTENT' tab is visible at the bottom of the detail section. The interface also includes a 'Last events' sidebar, a 'DETAIL' sidebar, and buttons for 'REPLY BY EMAIL' and 'CLOSE' at the bottom.

You can view the contact 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, you can view its **creation date**, its unique **ID**, the initial **media** affected, its initial **subject** and its current **status** (closed, in progress, etc.).

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 (🔄).

9.5.5.2 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.

The screenshot displays the Alcatel•Lucent Enterprise interface. On the left, a sidebar contains three widgets: 'History of exchanges' (1 item), 'History of actions' (38 items), and 'Contact history' (7 items). The 'Contact history' widget is highlighted with a red border and lists the last 10 contact folders. The main area shows an email from 'a.smith@mailbox.com' to 'testrd-vm.com' with the subject 'Problem with the delivery'. The email content includes a greeting, a complaint about a missing order, and a request for information. The sidebar lists the following contact history items:

Date	Contact
30 juil. 2021	Chat with Ann
29 juil. 2021	Incoming call from 0102030405
29 juil. 2021	Incoming call from 0102030405
28 juil. 2021	a.smith@mailbox.com
28 juil. 2021	Incoming call from 0102030405
28 juil. 2021	Incoming call from 0102030405
28 juil. 2021	Incoming call from 0102030405
28 juil. 2021	Incoming call from 0102030405

It displays the last 10 contact folders in the **In progress** desktop.

9.5.6 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.

9.5.6.1 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
30/07/2021 09:37:28	n°76589	International delivery	Orders	Sales	3	Contact reply	<input checked="" type="radio"/>	<input type="checkbox"/>
29/07/2021 11:29:40	n°76699	Return	Orders	Sales	1	To be processed	<input type="radio"/>	<input type="checkbox"/>
29/07/2021 11:29:25	n°76696	Return	Orders	Sales	2	Closed	<input type="radio"/>	<input type="checkbox"/>
29/07/2021 11:24:03	n°76697	Return	Orders	Sales	2	Closed	<input type="radio"/>	<input type="checkbox"/>
29/07/2021 11:23:09	n°76692	Return	Orders	Sales	2	Closed	<input type="radio"/>	<input type="checkbox"/>
29/07/2021 11:21:22	n°76693	Return	Orders	Sales	2	Closed	<input type="radio"/>	<input type="checkbox"/>
29/07/2021 11:20:47	n°76694	Return	Orders	Sales	2	Closed	<input type="radio"/>	<input type="checkbox"/>

Page 1/1




For each folder, you can view:

- its creation **date** and time,
- its **number**,
- 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.

9.5.6.2 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	

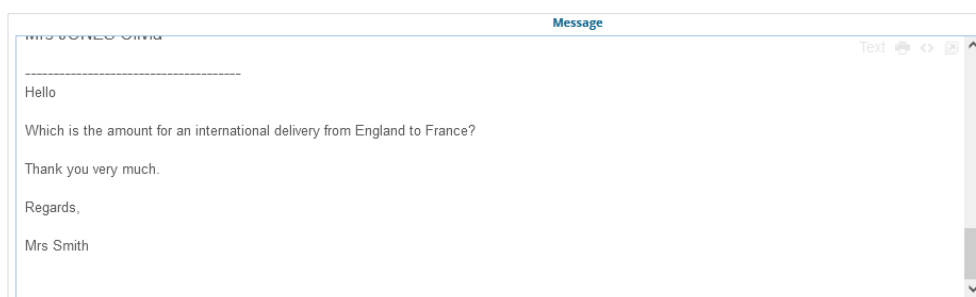
You can view for each exchange:

- 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.




9.5.6.3 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.

9.5.7 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).




9.5.7.1 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).

The screenshot displays the 'KNOWL. BASE' tab in the ALE Connect interface. At the top, there are navigation tabs: 'CONTEXT', 'CONTACT', 'KNOWL. BASE' (highlighted), 'SCRIPT', and 'QUALIFICATION'. Below the tabs, a search bar contains the text 'return' (marked with a red circle 1). To the right of the search bar are icons for search (magnifying glass) and list (three horizontal lines) (marked with a red circle 2). Below the search bar, there is a section titled 'Advanced search' with a dropdown menu showing a list of categories: 'Chat' (marked with a red circle 3), 'Claims', 'Delivery', 'Procedures', and 'Returns'. The main content area shows search results for 'return'. It lists two items: '001 Item return' and '003 Refund' (marked with a red circle 4). Below the list, there is a detailed view of the 'Item return' template, which includes the text: 'Returning your order has never been easier. To prepare your return, pack the unwanted items and simply attach the pre-paid label onto the front of the parcel. Next, choose from one of the following returns options:' (marked with a red circle 5). At the bottom right of the interface, there is a blue button labeled 'INSERT'.

Here you can search a response template to the contact request.

For this purpose, there are 3 methods:

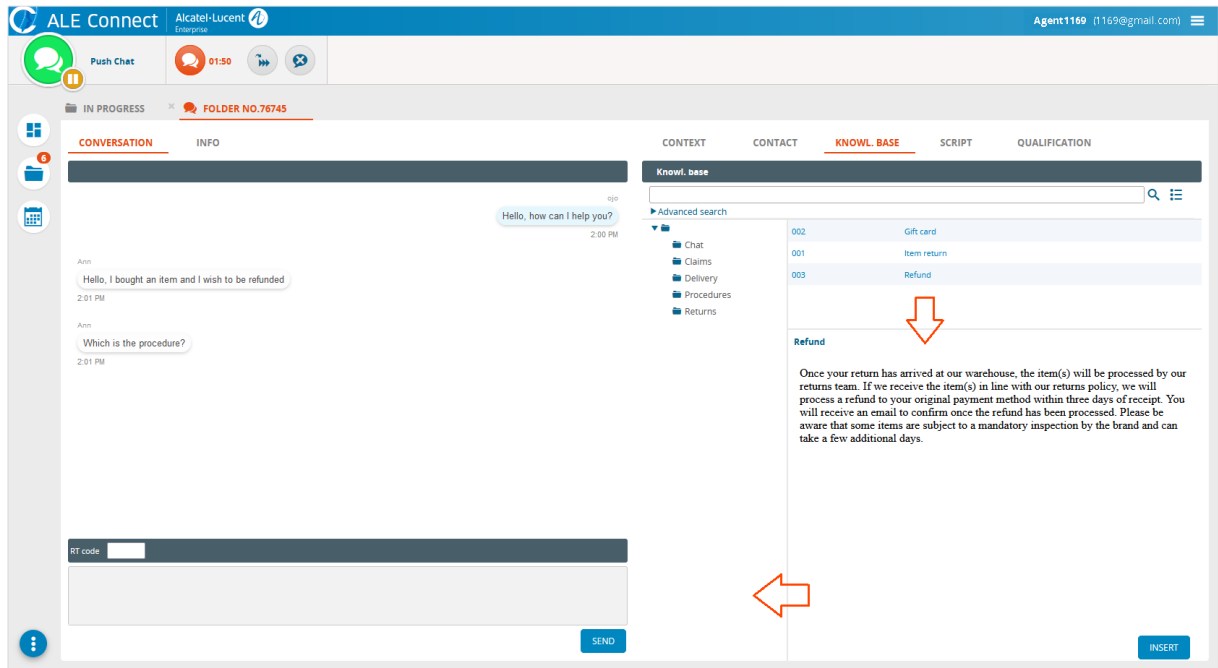
- **Enter a character string in the entry area (1)** that will be searched in the **title**, the **body** (criterion checked by default) and the **keywords** of response templates. Then simply click the magnifying glass  to launch the search. By clicking **Advanced search** () , you will display all 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.

9.5.7.2 Inserting a template response 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.

9.5.7.3 Inserting a template response 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.

9.5.7.4 Inserting a template response 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:

The screenshot shows an email composition window. At the top, there are fields for 'To:' (ann.smith@mailbox.com), 'CC:', and 'Att:'. Below these is a toolbar with 'RT code', 'Introductions', and 'Conclusions' dropdowns. A 'Response template' button is highlighted with a red box. To its right are 'AI', 'Suggest a RT', and 'Preview' buttons. Below the toolbar is a rich text editor with various formatting options (Font Sizes, Bold, Italic, Underline, Text color, Background color, Bulleted list, Numbered list, Indent, Outdent, Link, Image, Table, ABC, English). The main text area contains 'Dear Mrs Smith'.

3. Click the place where the response template should be inserted.
4. Click the **Response template** link.

The following window is displayed:

The screenshot shows a dialog window titled 'Insert a response template'. It has a search bar with 'return' entered and a magnifying glass icon. Below the search bar is a table with two columns: 'ID' and 'Name'. The table contains two rows: '001' with 'Item return' and '003' with 'Refund'. To the left of the table is a sidebar with a tree view containing 'Chat', 'Claims', 'Delivery', 'Procedures', and 'Returns'. Below the table, the 'Item return' template is displayed, showing the text: 'Returning your order has never been easier. To prepare your return, pack the unwanted items and simply attach the pre-paid label onto the front of the parcel. Next, choose from one of the following returns options:'. At the bottom right of the dialog is an 'INSERT' button.

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).

9.5.7.5 Inserting a template response 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).

The screenshot displays the ALE Connect interface for Agent 1169. The top bar shows the Alcatel-Lucent logo and the agent's name. The main interface is divided into several sections:

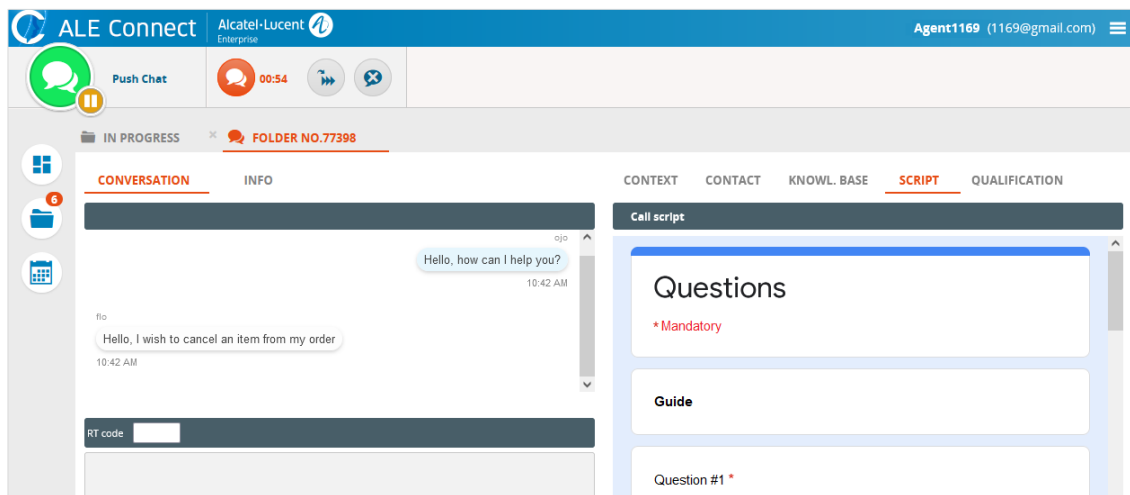
- IN PROGRESS**: A tab for the current call, showing an incoming call from Ann SMITH (0102030405) with a phone number of 423880. The call is in the 'Sales' queue, with a waiting time of 'None' and a folder number of 76746.
- Last events**: A section showing the last event, 'Chat with Ann', which is 'Not completed'.
- Subject**: A section for the call subject, currently showing 'Incoming call from 0102030405'.
- Notepad**: A large text area for taking notes during the call.
- Reply**: A section for replying to the call, with buttons for 'REPLY BY EMAIL', 'REDIRECT', and 'CLOSE'.
- Knowledge Base**: A section for searching and viewing response templates. It includes a search bar and a list of results:

Item	Category	Template Name
002	Gift card	
001	Item return	
003	Refund	

9.5.8 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.

9.5.9 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. However, 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.

Note: the criteria, obligation or not to enter, and the number to be filled in are defined by the coordinator.

9.5.9.1 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:

The screenshot shows a web interface with a top navigation bar containing five tabs: CONTEXT, CONTACT, KNOWL. BASE, SCRIPT, and QUALIFICATION. The QUALIFICATION tab is selected and highlighted with an orange underline. Below the tabs is a dark grey header bar with the word 'Qualification' in white. Underneath this header, the text 'Global checking of thresholds (min : 1 - max : 3)' is displayed. The main content area contains two expandable sections. The first section, 'Information', is expanded and shows five checkboxes: 'Brand & Stores', 'Careers', 'Customer accounts', 'Data security', and 'Promotional offers'. The second section, 'Services', is also expanded and shows five checkboxes: 'Delivery', 'Disputes', 'Orders', 'Refund', and 'Returns'. All checkboxes are currently unchecked.

The qualification criteria cannot be modified.

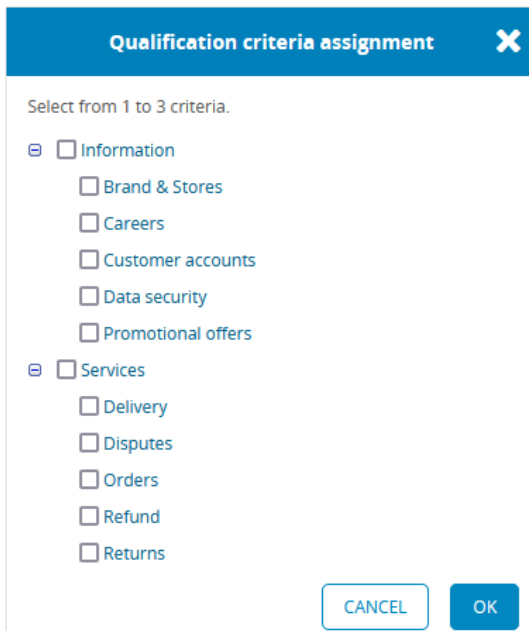
2. Check the **criteria** matching the interaction.
3. According to the setup, a minimum and/or maximum number of criteria may be required: this rule is specified on top of the screen.
4. Click **Validate** to save your entry.
5. The folder is now qualified.

9.5.9.2 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. From the **Actions** tab, click **Qualification**.

The following window is displayed:



The dialog box titled "Qualification criteria assignment" has a close button (X) in the top right corner. Below the title bar, it says "Select from 1 to 3 criteria." There are two main sections: "Information" and "Services", each with a collapse/expand icon (⊞) to its left. Under "Information", there are five checkboxes: "Brand & Stores", "Careers", "Customer accounts", "Data security", and "Promotional offers". Under "Services", there are five checkboxes: "Delivery", "Disputes", "Orders", "Refund", and "Returns". At the bottom right, there are two buttons: "CANCEL" and "OK".

The qualification criteria cannot be modified.

6. Check the **criteria** corresponding to 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.

7. Click **Validate** to save your entry.

9.6 Inventory of actions

9.6.1 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 freeing the folder by dissociating the agent who was possibly assigned to its processing.

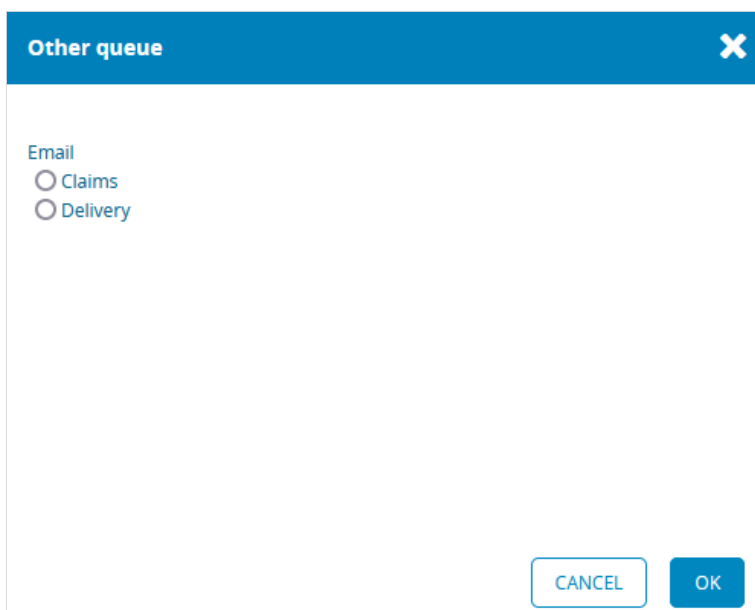
Warning: it is not possible to redirect a folder to a Twitter queue.

9.6.1.1 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.

9.6.1.2 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.

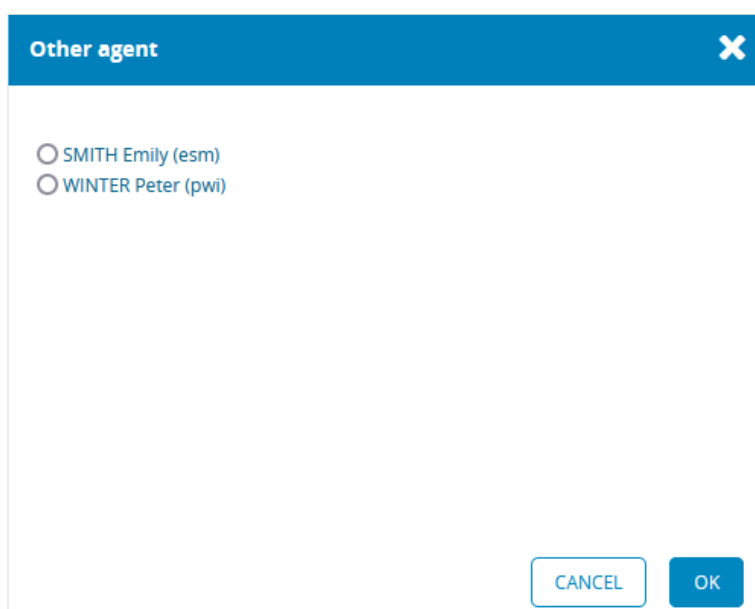
9.6.2 Redirecting a folder to an agent

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.

9.6.2.1 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.

9.6.2.2 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.

9.6.3 Redirecting a folder to a skill

A skill is an ability, a professional know-how allowing the agent to perform various tasks (ex: 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.

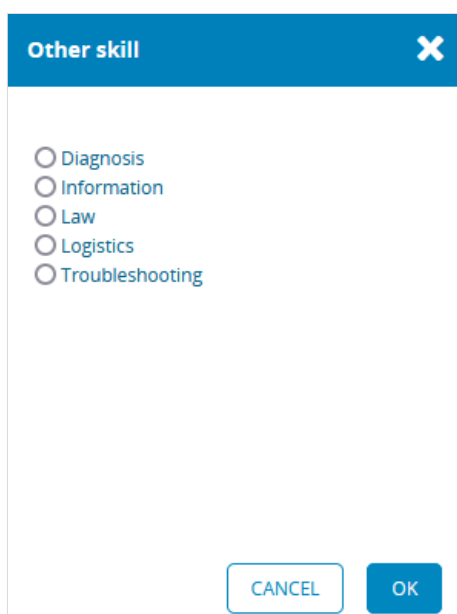
If the skill assigned to a folder is not suitable, you can modify it (if your user rights allow you to do so). The folder status is not affected by this change.

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.

9.6.3.1 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:



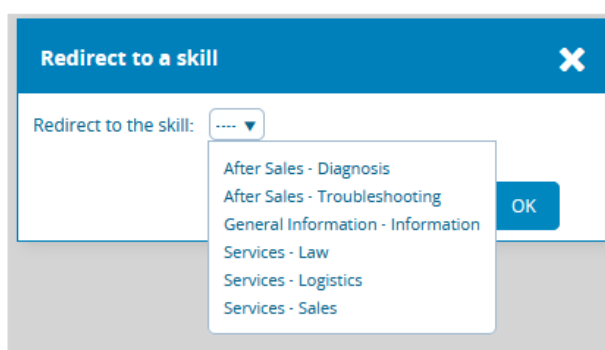
5. Select the new skill to assign to the folder.
6. Click **OK** to confirm your choice.

ALE Connect immediately assigns the skill to the folder, and then closes the corresponding tab.

9.6.3.2 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.

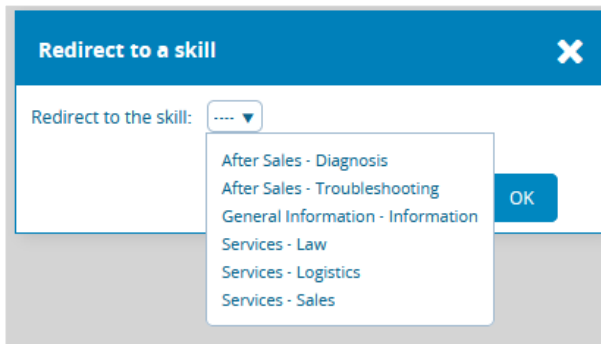
ALE Connect immediately assigns the skill to the folder, and then closes the corresponding tab.

9.6.3.3 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.

9.6.4 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.

The expert receives the folder as an email: the <InfoRef...> folder reference is mentioned in the subject of the email. He/She prepares his/her reply and sends it via his/her mailbox. Unlike [external agents](#), 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.

9.6.4.1 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 **Internal** 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.

9.6.4.2 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.

9.6.4.3 From the expert's side

The expert receives the folder as an email: the <InfoRef...> folder reference is mentioned in the subject of the email. He/She prepares his/her reply and sends it via his/her mailbox.

Unlike external agents, 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.

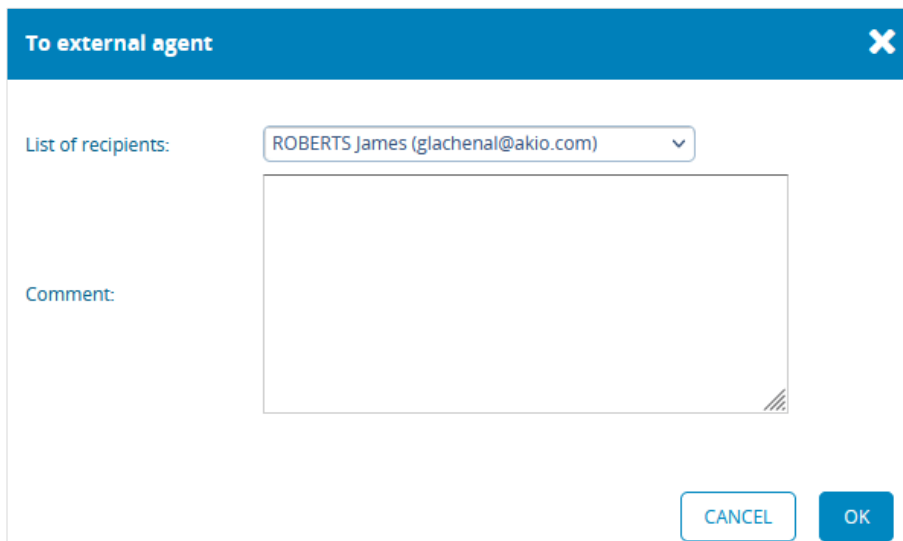
9.6.5 Redirecting a folder to an external agent

This procedure allows you to give the processing of a folder in progress to an external agent. Once transferred, the folder changes to the **To be processed by external agent** status, and then is moved to the **External - In progress** desktop.

Warning: an address book of official external agents must be available to use this functionality (created by the coordinator). Indeed, it is not possible to freely enter their email address for security and confidentiality reasons.

9.6.5.1 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 external agent**.
5. The following window is displayed:





6. Select the email address of the external agent who will process the folder from the list of recipients.
7. Write a comment to him/her if necessary.
8. Click **OK** to save your entry, or **Cancel** to abandon this action.

ALE Connect sends the folder to the external agent, and then closes the corresponding tab.

9.6.5.2 Group of folders

It is possible to send several folders to the same external agent, in a single action.

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 external agent** grouped action.
6. Select the email address of the external agent who will process the folder from the list of recipients.
7. Write a comment to him/her if necessary.
8. Click **OK** to confirm your action, or **Cancel** to abandon it.

9.6.6 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 a billing 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**.

The following screen is displayed:

5. Fill in the email addresses of the recipients of the folder, those of the persons in copy (**Cc**) and in blind copy (**Bcc**).
6. 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.

7. 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.

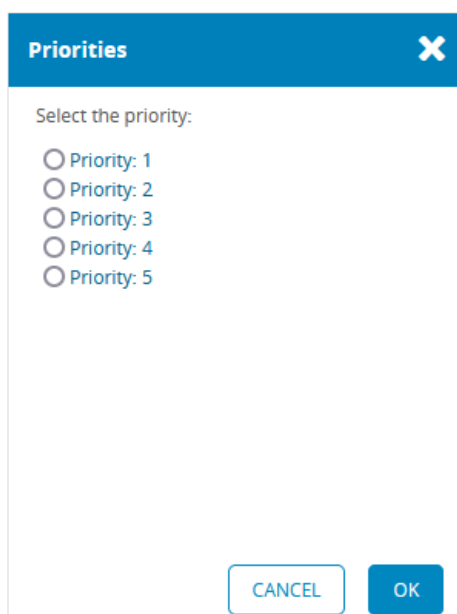
9.6.7 Changing the priority of a folder

You can modify manually the priority of an email folder in order to accelerate its support. If agents work in push mode, the folder will remain in the list of folders to be processed, and will be distributed more or less quickly according to the assigned priority.

Note: the folder status is not affected by a change in priority.

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:



Priorities X

Select the priority:

- ☐ Priority: 1
- ☐ Priority: 2
- ☐ Priority: 3
- ☐ Priority: 4
- ☐ Priority: 5

CANCEL OK

5. Check the new priority of the folder.
6. Click **OK** to confirm your choice.


ALE Connect updates immediately the priority of the folder and closes the corresponding tab.

9.6.8 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.

9.6.9 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.

9.6.9.1 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 **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.

9.6.9.2 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.

9.6.10 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.).

9.6.10.1 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 **Free**.

ALE Connect frees the folder, and then closes the corresponding tab.

9.6.10.2 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.

9.6.11 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.).



9.6.11.1 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.

9.6.11.2 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.

9.6.12 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.

9.6.13 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. 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.

9.6.13.1 What can you reactivate?

Any folder, whatever its media, that is stored in one of the following desktops:

Desktop	Consequence
<u>Internal - Processed</u>	The folder returns to the In progress desktop and can again be supported by an agent.
<u>Internal - Recycle bin</u>	The folder returns to the internal 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.
<u>External - In progress</u>	The folder returns to the In progress desktop and can again be supported by an agent.
<u>External - Closed</u>	The folder returns to the In progress desktop and can again be supported by an agent.
<u>External - Recycle bin</u>	The folder returns to the In progress desktop and can again be supported by an agent.

9.6.13.2 Procedure

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 Folders of the external desktop

The contact centre may have to delegate the processing of certain specific folders, on an episodic basis, to people external to the company: in ALE Connect, they are called external agents.

An **external agent** works with the contact centre, but is not part of the company's workforce. As a result, he/she does not have access to ALE Connect and therefore does not need a license. His/Her role is to process the email folders sent to him/her by agents; his/her mailbox is used as a working tool. Unlike experts, the external agent is responsible for responding directly to the contact without any intermediary for validation.

An **external folder** is therefore a folder that has been sent to an external agent (it keeps its initial number). As this is a special circuit, these folders are stored separately in external desktops. According to your profile, you may not be able to access it from your ALE Connect interface. If necessary, we invite you to contact your supervisor.

An external folder looks exactly like an internal folder of written media. However, your scope of action is much more limited: you can only remind the external agent, reactivate or delete the folder. The basic actions located in the toolbar are also available (printing, grouping of folders, etc.).

Advise: this circuit is suitable for a low and episodic flow of folders. It is not recommended if the volume of folders to be processed is high. Before implementing it, we invite you to contact your ALE Connect coordinator to study the possibilities of implementation.

10.1 Statuses of an internal folder

The status of an external 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 an internal folder, detailed by desktop.

External desktop - In progress

Status	Description
To be processed by external agent	Default status of a folder when arriving in the desktop, after sending to external agent. It is considered that no processing has been performed on this folder yet. This status will change after an external agent supports the folder.
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, etc.).
Remind to external agent	An agent (or a supervisor with rights on external desktops) has sent back the folder again to the external agent for processing. This reminder is performed directly from the folder.

External desktop - Closed

Status	Description
Archived	The folder has been archived by the external agent from his/her mailbox.
Closed by external agent	The folder has been closed by the external agent from his/her mailbox, when the contact's request has been satisfied.
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, etc.).

External desktop - Recycle bin

Warning: folders in this desktop keep the status they were in before being moved to the recycle bin.

Status	Description
To be processed by external agent	Default status of a folder when arriving in the In progress desktop, after sending to external agent. It is considered that no processing has been performed on this folder yet. This status will change after an external agent decides to handle the folder.
Archived	The folder has been archived by an external agent from his/her mailbox. The contact's request is considered as satisfied.
Closed by external agent	The folder has been closed by an external agent from his/her mailbox, when the contact's request has been satisfied.
In progress	The folder is currently being opened by an agent.
Reminder to external agent	An agent (or a supervisor with rights on external desktops) has sent back the folder again to the external agent for processing. This reminder is performed directly from the folder.

10.2 Processing an external folder

The external agent has received in his/her mailbox a folder to process as an email. This email is easily identifiable as its subject indicates the reference number and the subject of the ALE Connect folder. The email body contains the initial message of the contact.

The external agent prepares his/her response. It will be sent directly to the contact, without any intermediate validation by a centre agent. The contact's request is considered as satisfied and the folder is closed: on ALE Connect, it changes automatically to the **Closed by external agent** status, and then is stored in the **External - Closed** desktop. Meanwhile, the contact receives by email the reply written by the external agent.

Warning: the folder number must not be changed or deleted in the subject of the email, to avoid any malfunction during the routing.

1. From his/her mailbox, the external agent selects and opens the email of the ALE Connect folder to be processed. The following screen is displayed:

The screenshot shows an email interface with the following elements and annotations:

- Annotation 1:** Points to the subject line: **<ExtOpeRef77407> Order still undelivered** and the sender: **Orders A: Orders**.
- Annotation 2:** Points to the main body of the email, which contains a message from Mary asking James to check delivery terms.
- Annotation 3:** Points to the response area, which has two dashed lines for input.
- Annotation 4:** Points to the web user message area, which contains a message from Mrs. Smith asking about her order.
- Annotation 5:** Points to the actions section, which lists options like Archive, Move to the Recycle Bin, and Refuse the message.

The email body text is as follows:

De : Orders <orders@testrd-vm-dp.fr>
A :
This message has been routed to you. Your answer will be sent directly to the web user without validation by an agent. Please do not modify the recipient address, or delete the reference number from the folder. Please answer between the two -----Answer----- lines below.

Hello James,
Can you check the delivery terms with the carrier please?
Thanks
Mary

-----Response-----
-----Response-----

-----Web user message-----
Hello
I still haven't received my order since June.
I know that since the delivery is international, the delivery time is longer.
However, there is a lot of delay.
When will I receive my order please?
Regards,
Mrs Smith

-----Actions-----
To perform an action, please insert an [x] between the corresponding brackets. You can add a comment in the --- Reply --- field. You only need to activate one and only one action.
[] Archive
[] Move to the Recycle Bin
[] Refuse the message
-----Actions-----

-----AI suggestions-----
You can copy and paste one of the following proposals in the Reply field if it suits you.
No suggestion for this topic
-----AI suggestions-----

The email is structured in a particular way. The entry rules are reminded, so that the action chosen by the external agent is correctly transmitted to ALE Connect.

On top of the screen, the external agent views the **subject of the email (1)** which details the ALE Connect folder reference beginning with <ExtOpeRef...>, the subject of the ALE Connect folder and the sender of the email (alias of the sending email address).

In the upper part of the email body is the **comment (2)** entered by the agent who sent the folder (optional).

The external agent has an **entry area to write his/her reply (3)** framed by two lines of dashes. He/She can refer to the **initial message from the contact (4)** below.

At the bottom of the email, various **actions (5)** are available according to the processing needs.

2. The external agent clicks **Reply**, without changing the recipient.
3. He/She writes his/her **reply** in the corresponding area.
The formatting and writing tools (copy-paste, spell checker, etc.) depend on the messaging software used.
4. When the reply is ready, the external agent sends the email.
This is then sent directly to the contact associated with the ALE Connect folder.

10.3 Archiving an external folder

The external agent can decide to archive directly a folder that has been assigned to him/her. He/She may notify a comment justifying the archiving. The folder changes to the **Archived** status, then is stored in the **External - Closed** desktop. A note is then added in the notepad of the folder to trace this action.

Archiving is usually useful when the folder is sent back the external agent, whereas it has already been processed. Typically, when the contact writes to the external agent to thank him/her for his/her reply. This new message will reactivate the folder that was closed (it returns to the In progress desktop) and will send it back to the external agent once again.

Note: it is always possible to reactivate an archived folder, in case of errors.

1. From his/her mailbox, the external agent selects and opens the email of the ALE Connect folder to be processed.
2. The external agent clicks **Reply**, without changing the recipient.
3. He/She writes his/her **reply** (optional) in the corresponding area.
4. He/She enters an x between the square brackets of the **Archive** option, in the **Actions** area.

-----Actions-----
To perform an action, please insert an [x] between the corresponding brackets. You can add a comment in the --- Reply --- field.
You only need to activate one and only one action.
☒ Archive
☐ Move to the Recycle Bin
☐ Refuse the message
-----Actions-----

5. The external agent sends his/her email.

10.4 Moving an external folder to the recycle bin

This action allows the external agent to delete a folder that has no longer interest (SPAM, obsolete, duplicate, etc.). Like archiving or refusal, he/she may enter a response justifying his/her decision. A note is then added in the notepad of the folder to trace the deletion.

Warning: the folder changes to the **To be processed** status and returns to the **In progress** desktop, as if it has never been processed by the external agent. Its processing deadline is also reset to 0.

1. From his/her mailbox, the external agent selects and opens the email of the ALE Connect folder to be processed.
2. The external agent clicks **Reply**, without changing the recipient.
3. He/She writes his/her **reply** (optional) in the corresponding area.
4. He/She enters an x between the square brackets of the **Move to the recycle bin** option, in the **Actions** area.

-----Actions-----
To perform an action, please insert an [x] between the corresponding brackets. You can add a comment in the --- Reply --- field.
You only need to activate one and only one action.
☐ Archive
☒ Move to the Recycle Bin
☐ Refuse the message
-----Actions-----

5. The external agent sends his/her email.

10.5 Refusing an external folder

The external agent can refuse to process a folder when, for example, the contact sends back a question that does not concern the folder, the folder is not within his/her competence, or the folder was sent to him/her in error. As archiving or recycle bin, the external agent may enter a response justifying his/her decision. A note is then added in the notepad of the folder to trace this refusal.

Warning: the folder changes to the **To be processed** status and returns to the **In progress** desktop, as if it has never been processed by the external agent. Its processing deadline is also reset to 0.

1. From his/her mailbox, the external agent selects and opens the email of the ALE Connect folder to be processed.
2. The external agent clicks **Reply**, without changing the recipient.
3. He/She writes his/her **reply** (optional) in the corresponding area.
4. He/She enters an x between the square brackets of the **Refuse the message** option, in the **Actions** area.

```
-----Actions-----
To perform an action, please insert an [x] between the corresponding brackets. You can add a comment in the --- Reply --- field.
You only need to activate one and only one action.
[ ] Archive
[x] Move to the Recycle Bin
[ ] Refuse the message
-----Actions-----
```



5. The external agent sends his/her email.

10.6 Reminding an external agent

A folder has been sent to an external agent and the contact centre has no news since. You want to know the status of its processing for multiple reasons: the initial request is urgent, the contact sent a reminder, the processing of the folder is delayed, etc.

The reminder consists in sending back the folder to the external agent once again. The folder remains in its current desktop and changes to the Reminder to external agent status. It can be performed from any external desktop.




10.6.1.1 Single folder

1. Click the **List of folders** button ()
2. Select the **External** type of desktop ()
3. Select the external desktop in which the folder to remind is stored.
If you do not know, perform a folder search.
4. Open the affected folder by clicking the corresponding line.
5. Click the **Remind the external agent** button located at the bottom of the screen.
A window is displayed: it reminds the email address of the external agent to which the folder will be sent back.
6. Write a comment to him/her if necessary.
7. Click **OK**.

ALE Connect sends back the folder to the external agent, and then closes the corresponding tab.

10.6.1.2 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. Select the **External** type of desktop ()
3. If necessary, perform a folder search.
4. Check the folders affected by the reminder.
5. Click the **Group** button ()
6. Select the **Remind the external agent** grouped action.
A window is displayed: it allows you to enter an optional comment about the reminder.
7. Enter a comment if you wish.
8. Click **OK**.
ALE Connect sends back the folder to the external agent.

11 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.

11.1 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.

11.1.1 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 screenshot shows a web application interface with a tab titled "CREATE CONTACT". Below the tab is a header "INFORMATION". The main content area is titled "New contact" and contains a form with the following fields:

- Title: Mrs (dropdown)
- Last name: SMITH
- First name: Ann
- Date of birth: (calendar icon)
- Contact ID: (empty text box)
- Company: (empty text box)
- Number: (empty text box)
- Street: (empty text box)
- Locality: (empty text box)
- Building: (empty text box)
- Postcode: (empty text box)
- City: LONDON
- Country: United Kingdom (dropdown)
- Home phone: (empty text box)
- Mobile phone: (empty text box)
- Email address: (empty text box)
- Verbatim: (empty text box)
- Comment: (empty text box)

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.

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 to 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

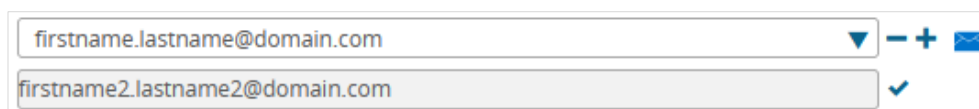
Select, from the choice list, the country where the contact lives. It is inherited from the system.

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.

11.1.2 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).

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.

11.1.3 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.

11.2 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.

11.2.1 Out of a folder

1. Click the **Search a contact** button (🔍) in the taskbar.
2. Enter the search criteria.
3. Click the **Validate** 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:

Folder	Media	Date	Subject	Queue	Skill	Agent	No.	Status
76589	📎	27/07/2021 15:...	International deli...	Orders	Sales	JONES	3	Contact re...
76699	📎	29/07/2021 10:...	Return	Orders	Sales	JONES	1	To be pro...
76696	📎	29/07/2021 10:...	Return	Orders	Sales	JONES	2	Closed
76697	📎	29/07/2021 10:...	Return	Orders	Sales	JONES	2	Closed
76692	📎	29/07/2021 10:...	Return	Orders	Sales	JONES	2	Closed
76693	📎	29/07/2021 10:...	Return	Orders	Sales	JONES	2	Closed
76694	📎	29/07/2021 10:...	Return	Orders	Sales	JONES	2	Closed

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.

Three **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.

11.2.2 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.

CONTEXT

CONTACT

KNOWL. BASE

SCRIPT

QUALIFICATION

Contact

Updated on 7/30/21 from the folder no. 76736

contact: 423880

Mrs Ann SMITH

Date of birth

04/07/1970

+440123456789

ann.smith@mailbox.com

WC2H 0DH LONDON GB

Contact ID

123456789

MODIFY CONTACT

ASSOCIATE CONTACT

11.3 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.

11.3.1 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.

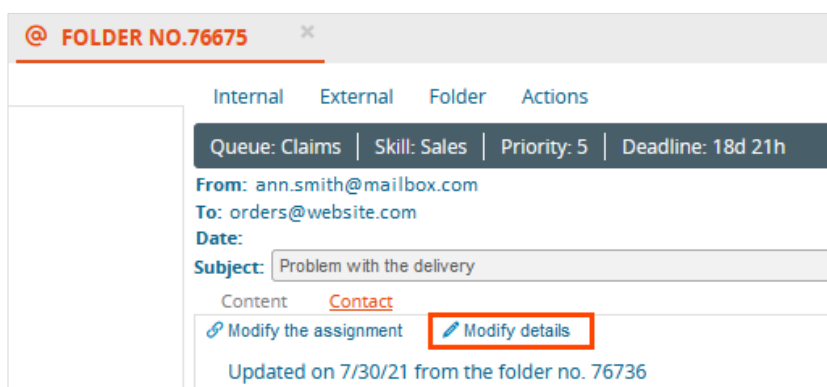
The last update date and time of the sheet are indicated, as well as the agent who performed the changes. This information may be useful when you need information or have questions to ask this agent.

5. Click the **Edit** button: the contact sheet is opened.
6. Modify the desired data by respecting the entry rules.
7. Click **Save**.

11.3.2 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.

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.

11.3.3 When processing a folder from another media

1. While processing a folder, click the Contact tab.
2. Click the **Modify contact** button.

The screenshot shows a web interface with a top navigation bar containing tabs: CONTACT (highlighted in orange), HISTORY, KNOWL. BASE, SCRIPT, and QUALIFICATION. Below the tabs is a dark header bar with the word 'Contact' and three icons. The main content area displays the following information:

- Updated on 7/30/21 from the folder no. 76736
- contact: 423880
- Mrs Ann SMITH
- Date of birth: 04/07/1970
- +440123456789
- @ ann.smith@mailbox.com
- WC2H 0DH LONDON GB
- Contact ID: 123456789

A blue button labeled 'MODIFY CONTACT' is located at the bottom right of the form.

3. Modify the desired fields.
4. Click the **OK** button.

11.4 Searching a contact

This essential action is easily accessible from many of ALE Connect functionalities, to make your work easier.

11.4.1 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:

The screenshot shows the ALE Connect interface with a 'CONTACT SEARCH' tab open. The interface includes a top header with the ALE Connect logo and Alcatel-Lucent Enterprise branding. Below the header is a 'Push Voice' button. The main area contains a search form with various fields and dropdown menus. A sidebar on the left shows icons for a window, a folder with a red '6' badge, and a calendar. An 'OK' button is located at the bottom right of the search form.

Field	Operator	Value
Reference	Is equal to	
Title	Contains	
Name	Contains	
First name	Contains	
Date of birth	Is equal to	
Contact ID	Contains	
Company	Contains	
No.	Contains	
Street	Contains	
Locality / Residence	Contains	
Building	Contains	
Postcode	Contains	
City	Contains	
Country	Is equal to	
Telephone	Contains	
Email address	Contains	
Verbatim	Contains	
Comment	Contains	

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 Validate 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/Child
423962	SMITH	Ann		16/08/2021	<input type="radio"/> <input type="checkbox"/>
423903	CONNOR	Olivia		16/08/2021	<input type="radio"/> <input type="checkbox"/>
423889	BROWN	Oliver		16/08/2021	<input type="radio"/> <input type="checkbox"/>
423880	SMITH	Ann	ann.smith@mailbox.com	30/07/2021	<input type="radio"/> <input type="checkbox"/>
423879	CONNOR	Jack		16/08/2021	<input type="radio"/> <input type="checkbox"/>
423878	KYLE	Harry		28/07/2021	<input type="radio"/> <input type="checkbox"/>
423873	WILLIAMS	Margaret	m.williams@mailbox.com	28/07/2021	<input type="radio"/> <input type="checkbox"/>
423871	EVANS	Victoria		28/07/2021	<input type="radio"/> <input type="checkbox"/>
42038	SMITH	Olivia	olivia.smith@mailbox.com	30/07/2021	<input type="radio"/> <input type="checkbox"/>
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.

11.4.2 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.

11.5 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: the history may show folders that you cannot access from the in progress or processed desktops. This happens when the coordinator has only given you read rights on a queue with the *Folders not visible* attribute, or has not given you read rights on a particular queue (it is then impossible to access the detail of the corresponding folders).

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:

INFORMATION		HISTORY									
Updated on 7/30/21 from the folder no. 76736		Folder	Media	Date	Subject	Queue	Skill	Agent	No.	Status	
contact: 423880		77422	📞	16/08/2021 15:2...	Incoming call fro...	Sales	Sales	JONES	1	Closed	🗑
Mrs Ann SMITH		76746	📞	30/07/2021 13:1...	Incoming call fro...	Sales	Sales	JONES	1	Closed	🗑
Date of birth 04/07/1970		76737	💬	30/07/2021 09:4...	Chat with Ann	Chat	Sales	JONES	1	Not compl...	🗑
@ ann.smith@mailbox.com		76679	📞	29/07/2021 08:2...	Incoming call fro...	Sales	Sales	JONES	1	Closed	🗑
📍 WC2H 0DH LONDON GB		76676	📞	29/07/2021 08:1...	Incoming call fro...	Sales	Sales	JONES	1	Closed	🗑
Contact ID 123456789		76675	@	28/07/2021 16:3...	a.smith@mail...	Claims	Sales	JONES	1	To be proc...	🗑
		76670	📞	28/07/2021 15:3...	Incoming call fro...	Sales	Sales	JONES	1	Closed	🗑
		76648	📞	28/07/2021 11:1...	Incoming call fro...	Sales	Sales	JONES	1	Closed	🗑
		76639	📞	28/07/2021 10:5...	Incoming call fro...	Sales	Sales	JONES	1	Closed	🗑

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.

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.

11.6 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.

11.6.1 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.

11.6.2 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.
7. Click **Yes** to confirm the merge, or **No** to cancel the action.

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

11.7 Specific case: deletion

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.

12 More help

12.1 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.

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.).

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

Knowledge base: library of shared elements facilitating the processing of the folders by the agents. It contains response templates, among other things. Any agent can thus use the knowledge base when processing folders.

Desktop: working directory presenting a list of folders, as a mailbox, all media included.

C

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.

Chat: instant messaging that allows contact centre agents to chat with web users in real time.

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).

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.

Dimension: in a statistical report, business axis you wish to analyse (ex: media, agents, calls, etc.). The dimensions are specific to each cube and can be used as filters. A report can contain several dimensions.

Folder: request from a contact that includes the different exchanges and processings related to this request, whatever the media used to initiate it.

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

Spontaneous email: email sent by an agent/supervisor, for which there was no prior request from the contact.

Business unit: sub-division of the tenant. The business unit is a set of queues with its own knowledge base.

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.

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.

Queue: set of folders from the same media. A queue mandatorily depends on a business unit.

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.

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

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 e-mails and chats.

Animated GIF: GIF (Graphics Interchange Format) is an image format frequently used on the Web. An animated GIF is a variant: this is a GIF file including a sequence of ordered images, displayed very quickly in a loop, thus allowing to obtain a short animation. Usually comic 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.

H

No entry in the glossary.

I

No entry in the glossary.

D

No entry in the glossary.

K

KPI: acronym of 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.

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).

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.

N

No entry in the glossary.

O

No entry in the glossary.

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.

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).

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.

R

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

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 assists 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

Handling time: measure used to evaluate the time spent by an agent to process a folder.

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.

Webbox: 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.

12.2 Frequently Asked Questions (FAQ)

Below you will find answers to the most frequently asked questions about ALE Connect.

12.2.1 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.

12.2.2 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.

12.2.3 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 current 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 check 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 / for 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.

12.2.4 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.

12.2.5 Chat

➤ **The webbox 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.

For this purpose, an authorised coordinator must modify 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 Webbox is therefore not displayed.

➤ **Can a survey be triggered at the end of a chat?**

Yes, it is possible technically (ex: 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.