

OMNI-CHANNEL

DOCUMENTATION



1. Why Omni-Channel?

In today's "Age of the Customer" world, the customer is engaging with organizations across channels — from web, social, mobile etc., Thus, it is imperative for customer-obsessed organizations to be listening, engaging, and acting consistently and effectively across all these channels.

An omni-channel program provides the ability to create a holistic snapshot of customers to better understand their needs, a goal that increases retention and lifetime value and provides the ability to deliver seamless and unique customer experiences.

2. Omni-Channel Program

Implementing an omni-channel program along every touch point of the customer journey — online, mobile, and social — will help you understand the customer experience and act quickly to reiterate brand exposure and increase customer loyalty. The Omni channel promise allows you to ask for feedback during your customer's experience or moment of truth, thereby allowing for shorter interactions or conversations than traditional long feedback forms.

Creating and executing a well-designed omni-channel program may seem like a daunting task — and it just might be one. Perhaps it would feel less daunting if organizations were to approach this as a journey toward Omni channel feedback collection rather than a single project.



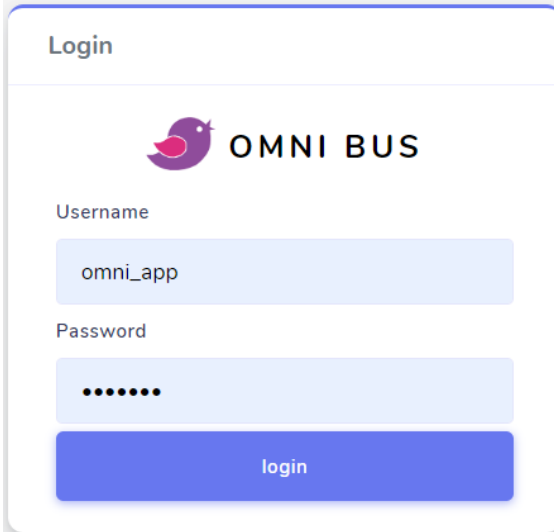
“Accessible everywhere on PC, tablet or mobile”

“Business maintained application”

3. Login

There are two user roles.

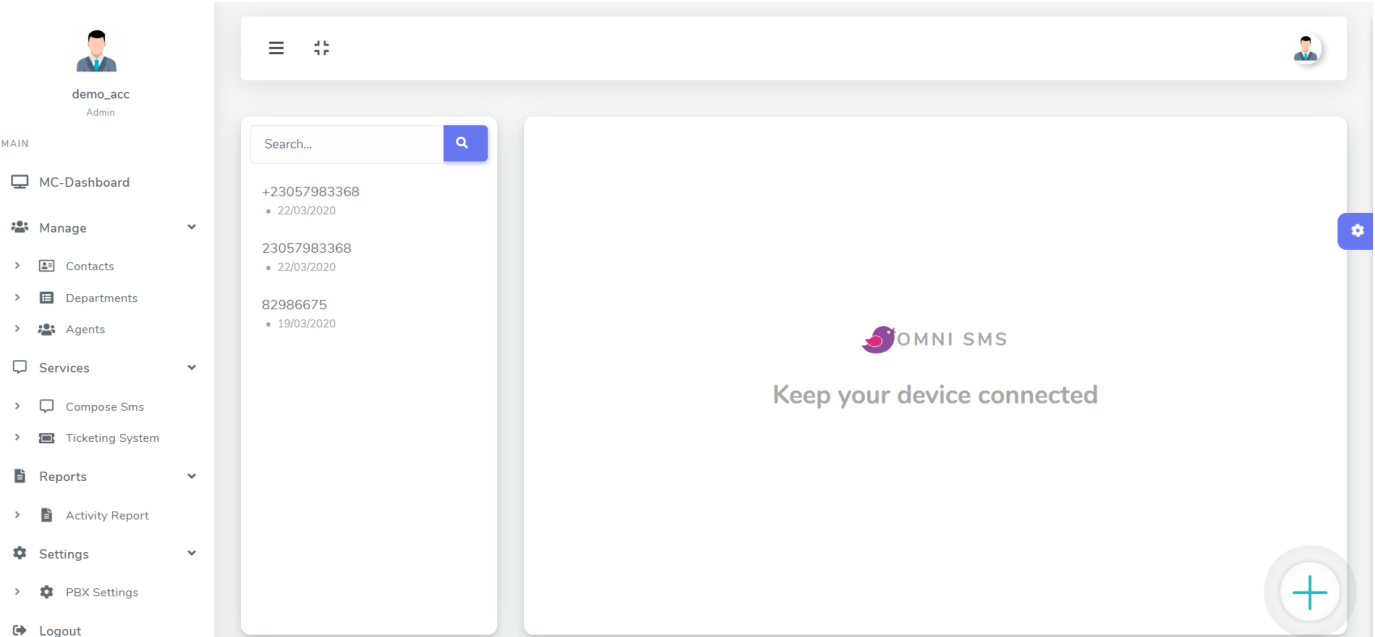
1. Admin
2. Agent



The login form is titled "Login" and features the OMNI BUS logo. It contains two input fields: "Username" with the value "omni_app" and "Password" with masked characters. A blue "login" button is positioned below the password field.

4. Dashboard

The customer information is securely transferred to backend systems as entered, and any activity on the front-end is immediately reflected on the back side to initiate actions, connect to back-end services and provide the required data on the fly.



The dashboard screenshot shows a user profile for "demo_acc Admin" and a sidebar menu with categories: MAIN, MC-Dashboard, Manage (Contacts, Departments, Agents), Services (Compose Sms, Ticketing System), Reports (Activity Report), Settings (PBX Settings), and Logout. The main content area displays a search bar and a list of phone numbers with dates: +23057983368 (22/03/2020), 23057983368 (22/03/2020), and 82986675 (19/03/2020). A large "Keep your device connected" message with the OMNI SMS logo is centered on the right. A floating action button with a plus sign is in the bottom right corner.

5. Manage Agent

Manage customer support teams/agents to increase sales/support

Agents + Add Agent

S.no	Name	Ext	Email	Phone number	Status	Action
1	Mani		cm@cal4care.com	82986675	Active	Edit
2	rashid	900	ve@cal4care.com	601	Active	Edit
3	AmadouD		voipsenegal@gmail.com	156879999	Active	Edit
4	IssenA		issena@footprintafrica.com	57983368	Active	Edit
5	HanzalaE	103	hanzala@footprintafrica.com	123456	Active	Edit

<
1
2
>>
+

5.1. Add Agent

Admin can able to add agent and control modules

Add Agent
×

Name

Phone number

User password

SMS

Email Id

User Name

Contact

Cancel
Add Agent

“Time efficient and effective sales fully integrated

With the Traditional channel”

6. Manage Customer

Manage contacts and by adding individually or bulk import using CSV

Contacts
+ Add Contact

Q

<input type="checkbox"/>	Name	Email	Phone Number	Action
<input type="checkbox"/>	Richard	ri@cal4care.com	+6513413XXXX	@ Unassigned
<input type="checkbox"/>	John	jn@cal4care.com	+6023341XXXX	@ Unassigned
<input type="checkbox"/>	Peter	ptr@cal4care.com	+65XXXXX2537	@ Unassigned

<
1
2
>

Add Contacts

<p>Contact Owner <input style="width: 90%;" type="text"/></p> <p>Contact Owner <input style="width: 90%;" type="text"/> Mr. Full Name</p> <p>Account Name <input style="width: 90%;" type="text"/></p> <p>Email <input style="width: 90%;" type="text"/></p> <p>Phone <input style="width: 90%;" type="text"/></p> <p>Office Phone <input style="width: 90%;" type="text"/></p> <p>Mobile <input style="width: 90%;" type="text"/></p> <p>Assistant <input style="width: 90%;" type="text"/></p> <p>Reports To <input style="width: 90%;" type="text"/></p> <p>Skype <input style="width: 90%;" type="text"/></p> <p>Twitter <input style="width: 90%;" type="text"/></p>	<p>Lead Source <input style="width: 90%;" type="text" value="- None -"/></p> <p>Last Name <input style="width: 90%;" type="text"/></p> <p>Title <input style="width: 90%;" type="text"/></p> <p>Department <input style="width: 90%;" type="text"/></p> <p>Home Phone <input style="width: 90%;" type="text"/></p> <p>Fax <input style="width: 90%;" type="text"/></p> <p>Date of Birth <input style="width: 90%;" type="text"/></p> <p>Asst Phone <input style="width: 90%;" type="text"/></p> <p>Email Opt Out <input type="checkbox"/></p> <p>Secondary Email <input style="width: 90%;" type="text"/></p> <p>Reporting To <input style="width: 90%;" type="text"/></p>
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Address Information

<p>Mailing Street <input style="width: 90%;" type="text"/></p> <p>Mailing City <input style="width: 90%;" type="text"/></p> <p>Mailing Province <input style="width: 90%;" type="text"/></p> <p>Mailing Postal Code <input style="width: 90%;" type="text"/></p> <p>Mailing Country <input style="width: 90%;" type="text"/></p>	<p>Other Street <input style="width: 90%;" type="text"/></p> <p>Other City <input style="width: 90%;" type="text"/></p> <p>Other Province <input style="width: 90%;" type="text"/></p> <p>Other Postal Code <input style="width: 90%;" type="text"/></p> <p>Other Country <input style="width: 90%;" type="text"/></p>
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Address Information

Description Information

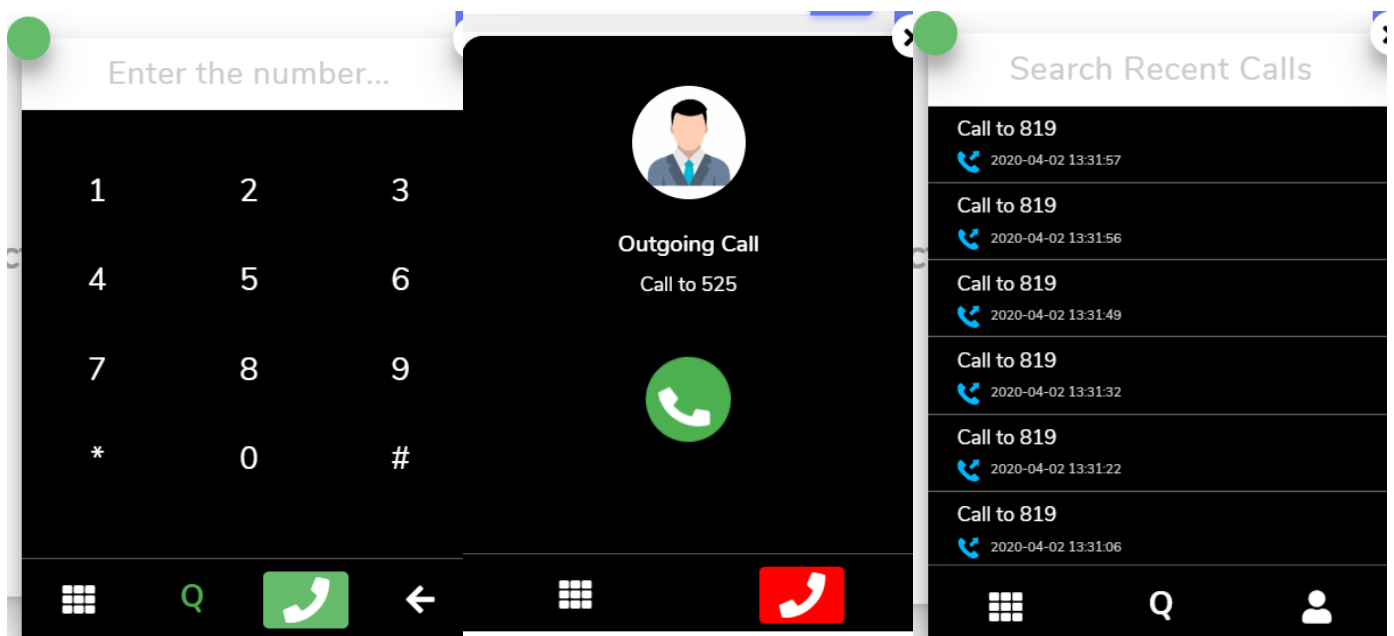
Add

7. VOIP Integrated – make calls (Web RTC)

In order to make and receive phone calls when you are not in front of your computer, you can use a softphone app on your cell phone in parallel of VoIP. This is useful for on-the-go calls, but also to make sure to hear incoming calls, or simply for convenience. Any SIP softphone will work.

You will then have to configure it as follows:

- Account name: 3CX
- SIP Server: the 3CX 'Domain'
- SIP User ID: the SIP 'Username'
- SIP Authentication ID: 3CX 'Auth Username'
- Password: the 3CX 'SIP Password'



8. SMS/Chat


Customers can open direct communication to your workforce and receive the support instantly via SMS. All self-service customer actions are automatically recorded and can issue instant notifications for your reports to take action and create new business opportunities.

Compose New SMS










Mobile Number

Enter Message


Send

SEARCH A CHAT +  +65829XXXXX × 🔍

13/01/2020

-  +65918XXXXX 14/01/2020 10:08 Sms
Noted on your cancellation....
-  +65968XXXXX 14/01/2020 09:14 Sms
Hi Mr. Kwa , noted on your ...
-  +659712XXXX 14/01/2020 09:11 Sms
Thank you for your reconfir...
-  +659625XXXX 14/01/2020 07:04 Sms
Hi Mr. Tan , for Chijmes ou...
-  +658322XXXX 14/01/2020 14:52 Sms
Thank you very much
-  +6598311565 14/01/2020 05:57 Sms
Noted on your cancellation ...
-  +65983XXXX 14/01/2020 05:31 Sms
Hi Ms. Winnie , noted on yo...
-  +659012XXXX 14/01/2020 12:44 Sms
Ok, thx
-  +658298XXXX 13/01/2020 13:56 Sms
Sir recived my msg

13/01/2020

 +6582986675
Hi 21:41


RAFFY
hi sir 13:52








RAFFY
Sir recived my msg 13:56

Type a message ➤

Web Chat

Monitor and chat with the visitors on your website, mobile app. Every day we listen to user feedback, to learn more about the features we should be focusing on. Feel free to chat with us at any time to discuss your specific live chat needs.

SEARCH A CHAT +  fvdsas ↓ 🔍

-  efvds
vefds 17/12/2019 15:54 Web
-  rgdf
bgrdes 17/12/2019 15:53 Web
-  fsdas
vdscda 17/12/2019 12:02 Web
-  test@chat
test 17/12/2019 12:01 Web
-  wdass
cds 17/12/2019 12:01 Web
-  fvdsas
fwsd 17/12/2019 12:00 Web
-  kn@cal4care.com
323232 16/12/2019 21:30 Web

17/12/2019

fvdsas
fdas 11:59


001
fwsd 12:00

--- Chat session ended ---

9. Ticketing System

Tickets						Generate Report
1	Access	swimming pool ah erumaky kon kahala kamehtho. Hulhumale platinum residence ga hu...	dhiraaguadmin	Closed	2020-03-20 19:12:47	
2	Support	2020-03-20 17:15:25: Incoming call from 7772119 to 116...	dhiraaguadmin	Closed	2020-03-20 19:12:57	
3	Call Center	2020-03-20 19:20:56: Incoming call from 7775546 to 112...	dhiraaguadmin	Closed	2020-03-20 19:31:53	
4	Support	covid 19 ah test kuraani kon baeh thao ...	dhiraaguadmin	Closed	2020-03-20 19:32:07	
5	Support	wants to inquire how to practice self isolation at home...	dhiraaguadmin	Open	2020-03-20 19:32:18	
6	Call Center	2020-03-20 19:07:43: Incoming call from 7445353 to 120...	dhiraaguadmin	Open	2020-03-20 19:32:35	
7	Support	2020-03-21 18:31:10: Incoming call from 9999700 to 119...	dhiraaguadmin	Open	2020-03-21 18:59:18	
8	Support	2020-03-23 17:19:23: Incoming call from 7766008 to 115...	dhiraaguadmin	Open	2020-03-23 19:47:31	+

←



dhiraaguadmin
Team: Support

2020-03-20 19:32:18

wants to inquire how to practice self isolation at home

Replies

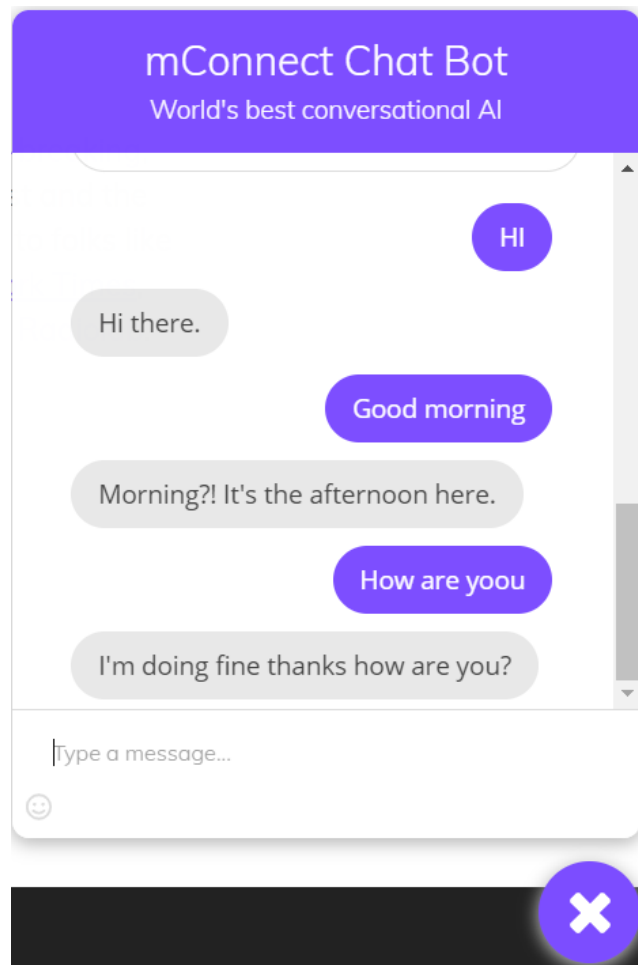
[click here to Reply or Re-assign or Close Ticket](#)

10. Chat bot

A chatbot (or bot) is a conversational software program designed to chat with humans via text.

Chatbots can be deployed in a variety of channels including popular voice and messaging platforms. The use cases are virtually endless, from automating common customer service queries, to providing touch points along the customer journey, to optimizing internal IT processes, to learning applications like language and enterprise soft skills, to games, toys, entertainment, and more.

**“Social Channels Integrated – Twitter, Facebook, Linked-in
Chat/Capture/Respond”**



11. Agent activities report

Admin can generate agent individual or specific agent activity report daily/custom bases.

Activity Report

Select Agent	Select caller
<input type="text" value="agent_001"/> agent_002 agent_003 agent_004 agent_005 agent_006	<input type="text"/>
From Date	To Date
<input type="text" value="dd/mm/yyyy"/>	<input type="text" value="dd/mm/yyyy"/>
<input type="button" value="Generate Report"/>	

Contact Name	Phone	Agent Name	Notes	Department	Activity	Created Date	Created Time	Responsible Department
	XXXX	agent_001	covid19.health.gov.mv website hoadhaalan			2/4/2020	9:25:14	
	XXXX	agent_001	covid19.health.gov.mv site hoadhan			2/4/2020	9:25:22	
	XXXX	agent_001	rajje ah europe in annan kithah myhun register kohffa veythw aa adhi nuges kithah myhun eba thibi thw aa			2/4/2020	9:25:55	
	XXXX	agent_001	lrufushi- leave vaan hadhan jehey goth ahaalan vegen			2/4/2020	9:26:08	
	XXXX	agent_001	Medianet in kohffa in mail ah answer nulibigen medianetadministration ge mail akun mail kohffa 7794905 - Azeez			2/4/2020	9:27:49	
	XXXX	agent_001	Arc Noble safari- from furan jehey goiy ahaalan			2/4/2020	9:28:19	