USER GUIDE · VERSION 1

Customer service

One place to answer customers from WhatsApp, email, the web form and live chat, with AI-drafted replies that a person approves, and follow-up of unhappy customers at each outlet.

1. What it is for
2. Sign in and say whether you are free
3. Find your tickets
4. Reply to a customer
5. Open a ticket yourself
6. Take live chats
7. Approve AI replies
8. Answer WhatsApp calls
9. Act on customer feedback at your outlet
10. Check what an outlet did
11. Watch for feedback that is stuck
12. Keep customer details right
13. Write help articles
14. Read the reports
15. What customers see
16. Change how the system works
17. Give people access
18. Set up automatic rules, extra fields and links

What it is for

For: Everyone

Customer service collects every customer conversation in one place. Messages arrive from WhatsApp (messages and voice calls), email, the web form on your website and live chat. Each conversation becomes a ticket. An AI (a computer program that reads and writes text) drafts a reply from your company's approved help articles, and a person stays in charge of what reaches the customer. Unhappy customers from **Customer feedback** also arrive here, and are passed to the outlet to put right.



Who uses it

Role	What they typically do
Agent	Answers the tickets given to them, takes live chats and calls, approves AI replies.
Supervisor	Everything an agent does, plus sees every ticket, moves work between people, reads reports, and watches feedback that is stuck.

Role	What they typically do
CS Manager	Everything a supervisor does, plus help articles, automatic rules, ticket types and extra fields.
Admin	Everything, including settings, channels, people and roles.
Outlet Manager	Sees only **My Feedback Tickets**: unhappy customers at their outlet, and records what was done.
Area Manager	Checks what an outlet did and closes the ticket, or sends it back.

An Admin can change what each role includes under **Roles & permissions**, so yours may differ. You only see the menu items your role allows.

What it needs from other modules

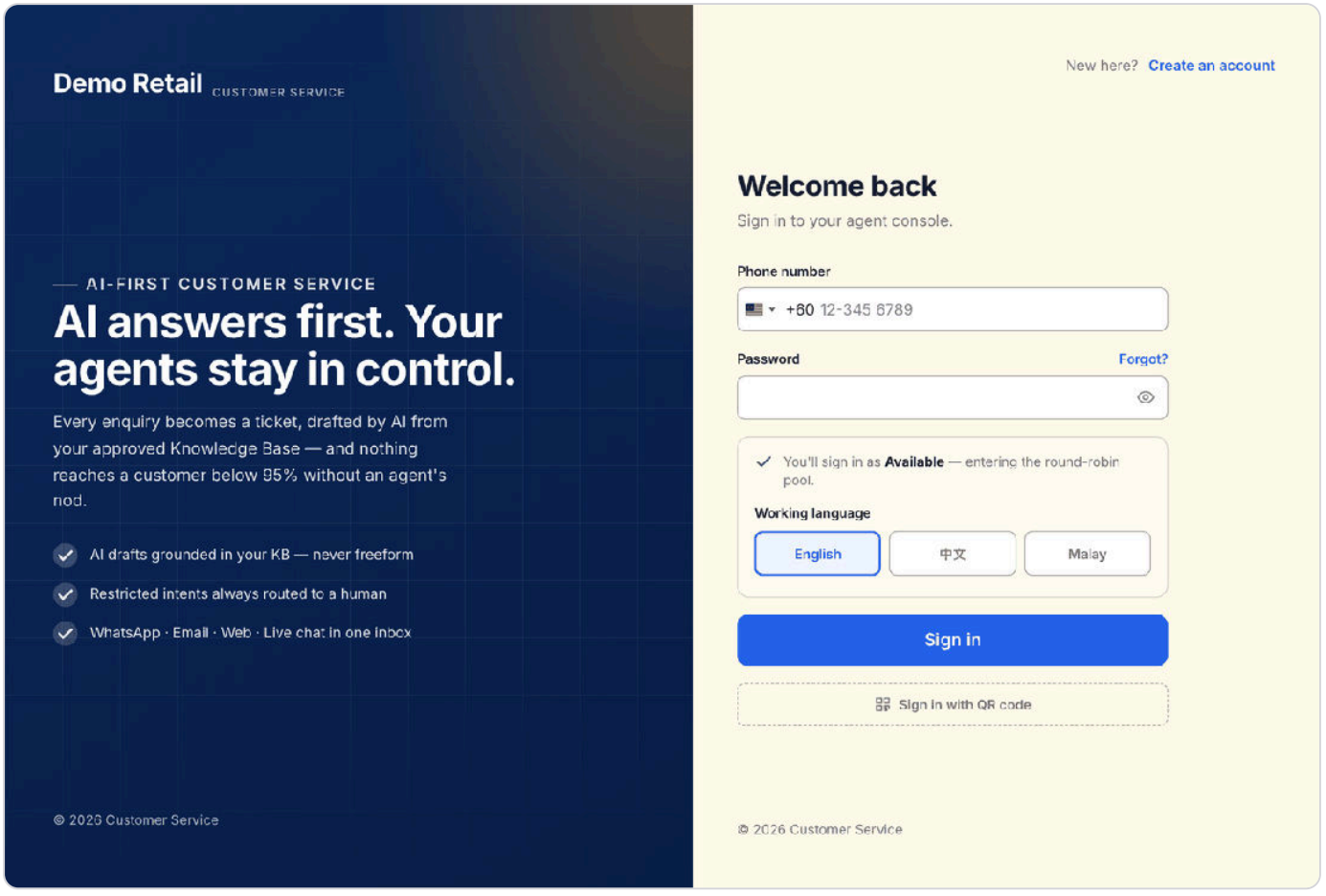
- **Customer feedback** sends unhappy survey customers here as tickets.
- Outlets, and who manages each one, come from your company's records in the Portal.
- **Outlet audit** receives audit requests from here, once the link between the two is switched on.

CUSTOMER SERVICE

Sign in and say whether you are free

For: Everyone

1. Open the sign-in page and type the **Phone number** and **Password** your administrator gave you. You can also press **Sign in with QR code** and scan it from a phone that is already signed in.
2. Pick your **Working language**: English, Chinese or Malay. Customer messages are translated into it, with the original kept underneath.
3. Press **Sign in**.



Signing in marks you **Available**, so new tickets and chats can be given to you. Forgot your password? Press **Forgot?** on the sign-in page, or ask an administrator.

Say whether you are free

Your status is at the bottom of the menu on the left, under your name. Choose **Available**, **Away** or **Offline**. New work only goes to people who are **Available**, so set **Away** before a break.

If your team takes WhatsApp calls, the **Off duty** / **On duty** switch at the top of the menu decides whether calls can ring you. It is separate from your status.

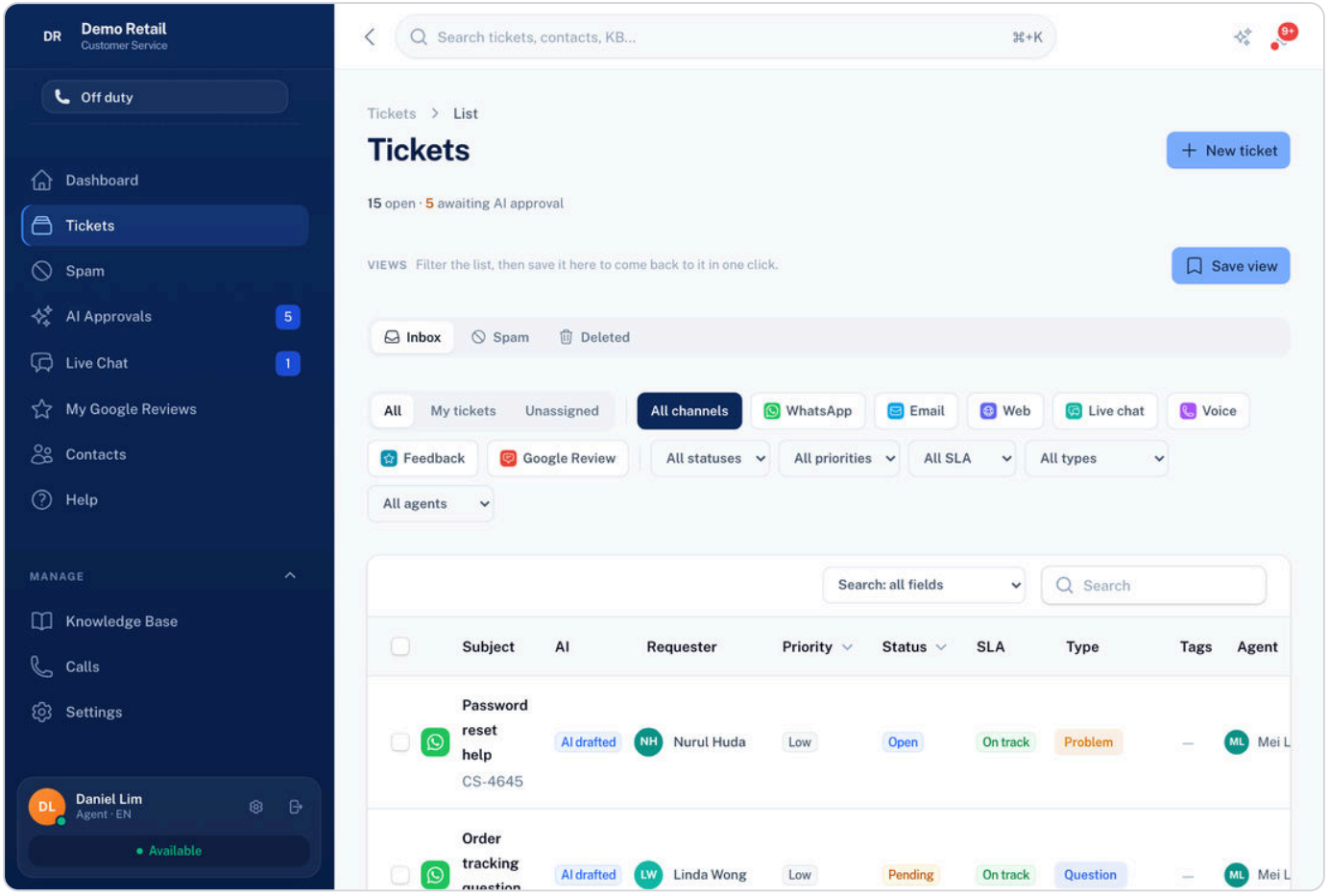
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Find your tickets

For: Agents

A ticket is one customer conversation, whatever way it came in.

1. Open **Tickets** in the menu on the left.
2. Use **All**, **My tickets** or **Unassigned** to choose whose tickets you see, and the channel buttons (**WhatsApp**, **Email**, **Web**, **Live chat**, **Voice**, **Feedback**, **Google Review**) to narrow it further.
3. Use the drop-down filters for status, priority, SLA (your target response time), type and agent, or type in **Search**.
4. Press a row to open the conversation.



To come back to the same filters later, press **Save view** and give it a name.

To change several tickets at once, tick them. A bar appears for changing the person, the status or the tags of all of them.

If you only ever see your own tickets, your role does not include seeing every ticket. Ask an administrator if you need it.

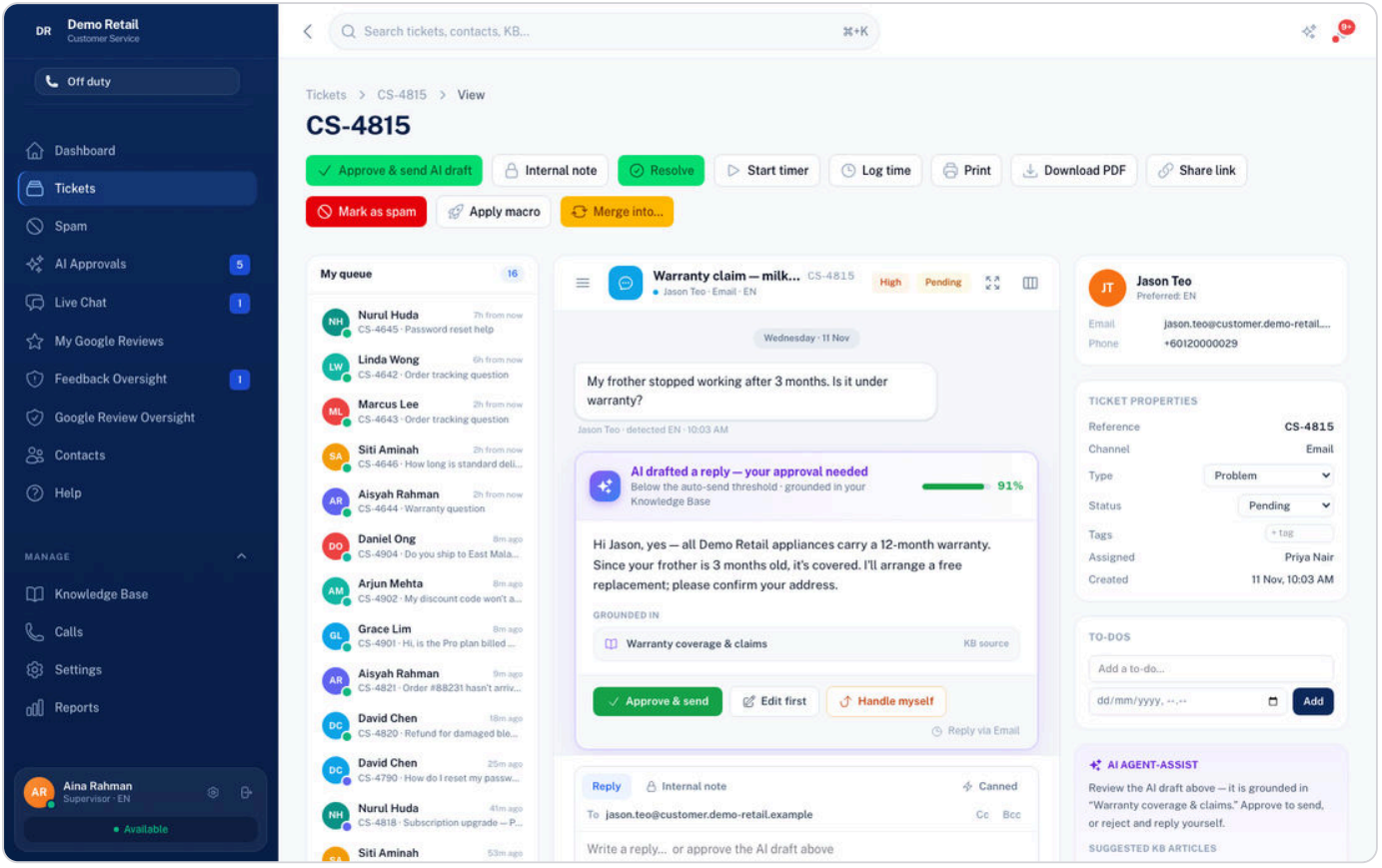
Press **⌘K** (on Windows **Ctrl+K**) at any time to jump to a ticket, a contact or a page.

Reply to a customer

For: Agents

The conversation is in the middle, your queue on the left, and the customer and ticket details on the right.

1. Read the conversation. Messages are shown in your working language, with the original underneath.
2. If the AI has drafted a reply, it shows how sure it is and which help article it used. Press **Approve & send** to send it as it is, **Edit first** to change it, or **Handle myself** to write your own.
3. To write your own, type in the box at the bottom and press **Send reply**. The customer gets it the same way they wrote to you.
4. Change **Status** on the right as you go. When you are done, press **Resolve**.



Other buttons on a ticket

- **Internal note**: a note only your team sees. Type @ and a name to call a colleague in.
- **Canned**: insert a saved reply. **Apply macro**: run a saved set of steps in one click.

- **Start timer** or **Log time**: record how long the ticket took.
- **Merge into…**: fold a duplicate ticket from the same customer into another.
- **Share link**: a read-only link for someone without an account, ending after 1 hour, 1 day or 7 days. Internal notes are never shown.
- **Print** or **Download PDF**: a copy of the conversation, without internal notes.
- **Mark as spam**: for junk. It stops the clock and leaves the reports.

WhatsApp's 24-hour rule

WhatsApp only allows a free reply within 24 hours of the customer's last message. After that, the box changes to **Send template**: pick one of your approved message templates to open the conversation again. This is WhatsApp's rule, not this module's.

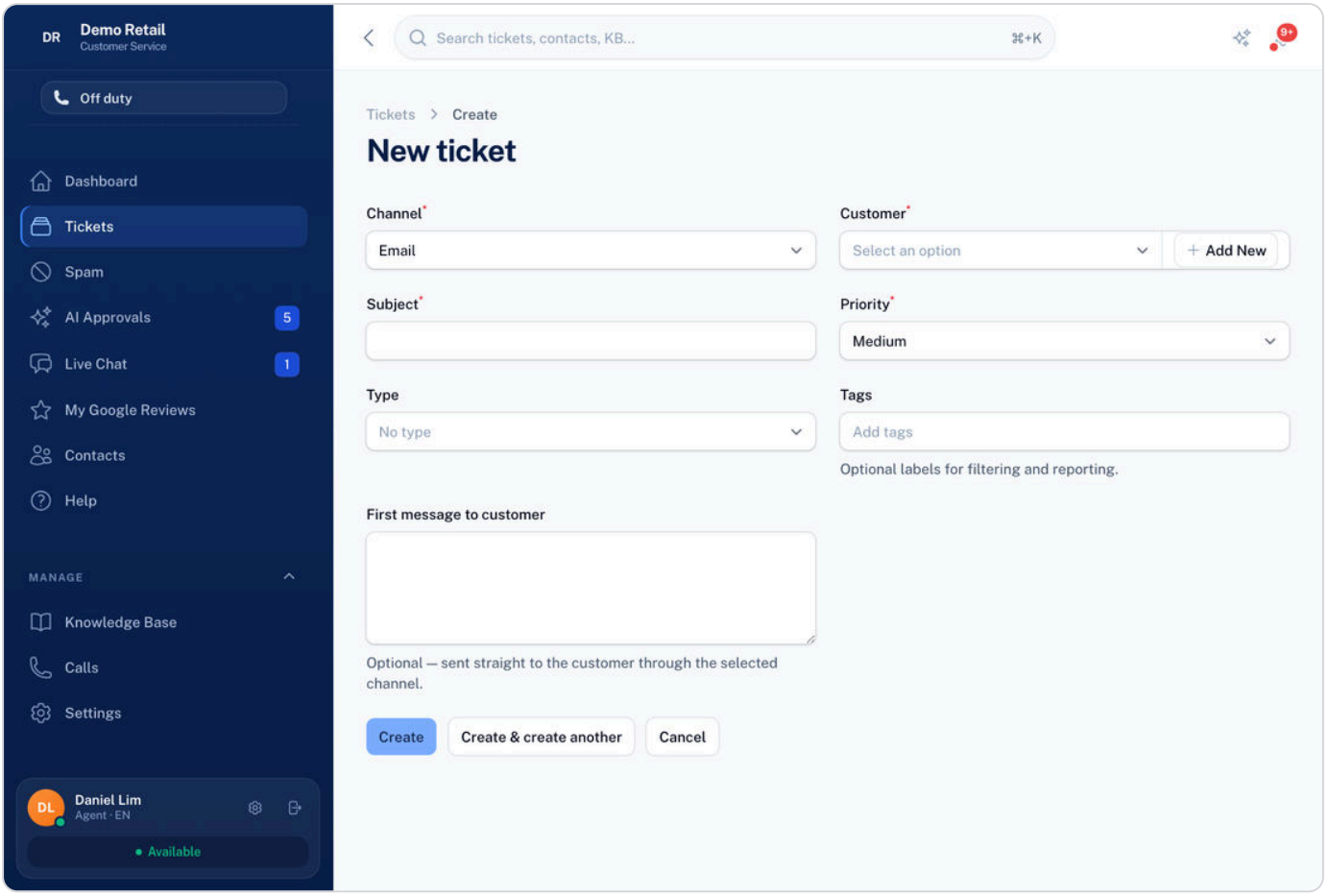
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Open a ticket yourself

For: Agents

Most tickets open by themselves when a customer writes in. When a request reaches you another way, such as a phone call or a walk-in, open one yourself.

1. Open **Tickets** and press **New ticket**.
2. Choose the **Channel** the customer wants replies on: **Email** or **WhatsApp**.
3. Choose the **Customer**, or press **Add New** to add them here.
4. Fill in the **Subject** and **Priority**, and if you like the **Type** and **Tags**.
5. To send the customer a first message now, write it under **First message to customer**. Leave it empty to open the ticket without contacting them.
6. Press **Create**.



A ticket you open yourself always starts a new conversation. It never joins an existing one.

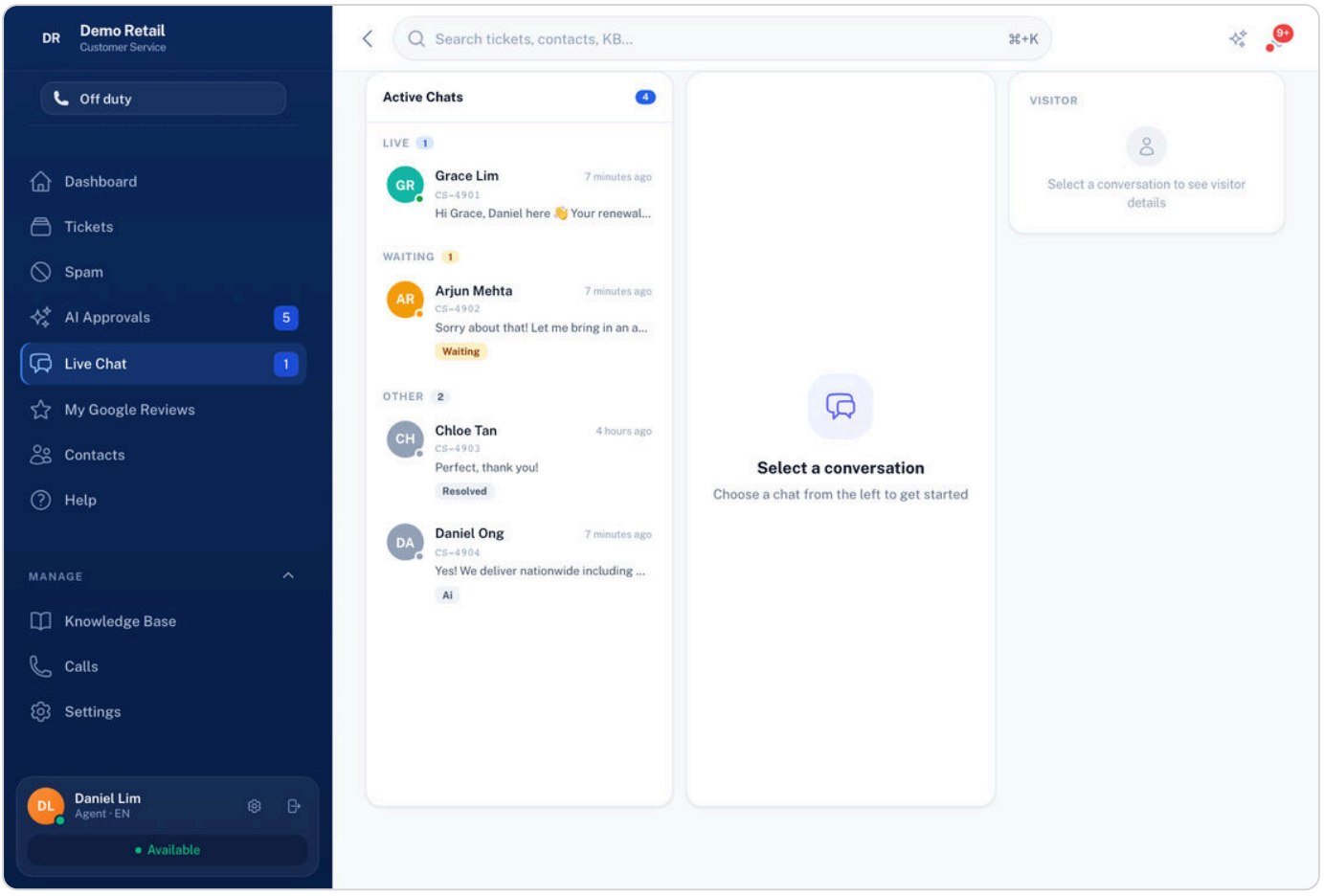
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Take live chats

For: Agents

Live chat is the chat bubble on your company's website.

1. Open **Live Chat** in the menu on the left. The number next to it is how many chats are waiting.
2. Chats are grouped into **Live**, **Waiting** and the rest. Press a waiting chat to take it.
3. Reply. The visitor sees your message straight away.
4. When you are done, resolve the chat so it leaves the list.



If chats stop updating by themselves, the live-update service has stopped. Tell whoever runs the system.

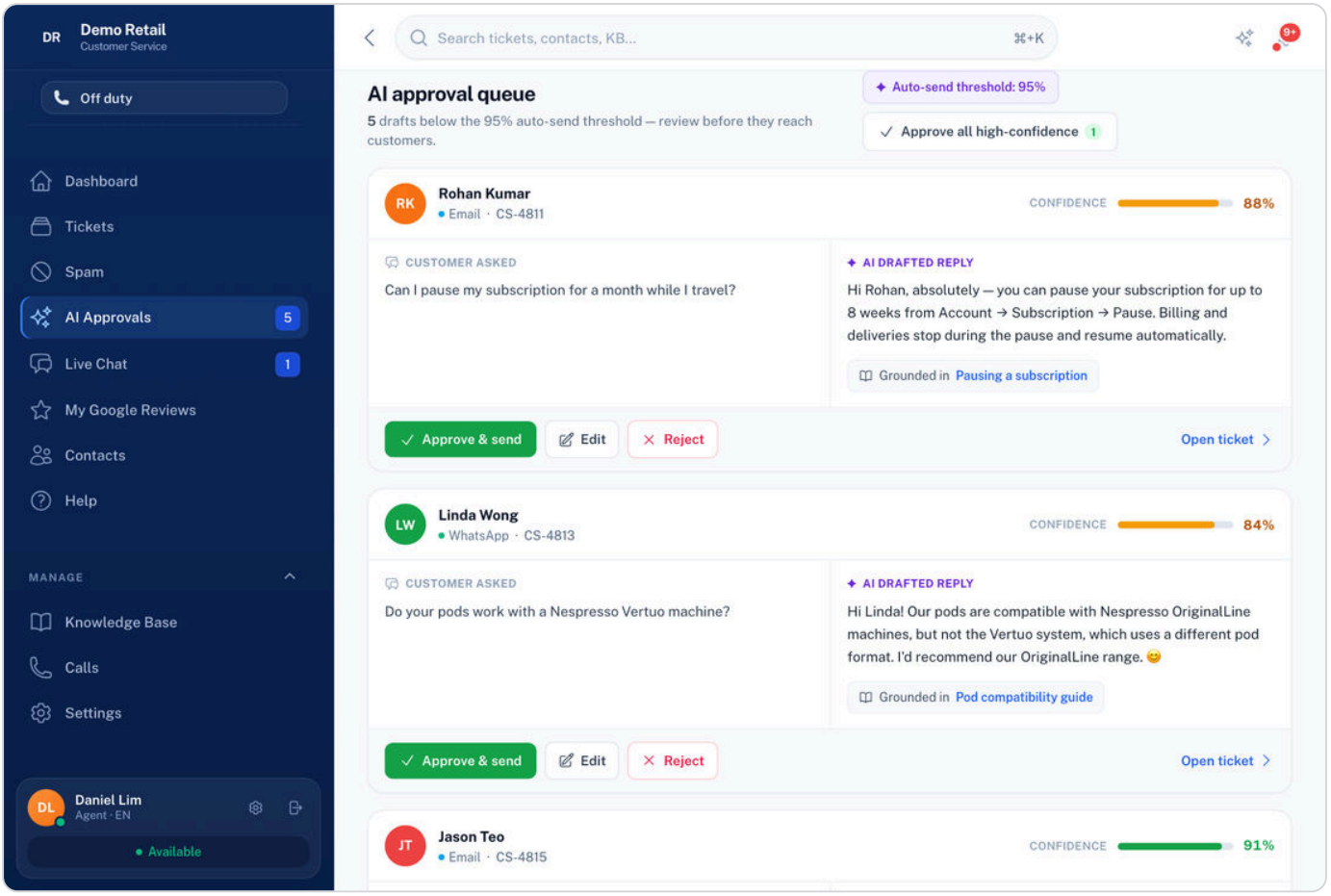
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Approve AI replies

For: Agents

When the AI is not sure enough to send a reply by itself, it waits for a person here.

1. Open **AI Approvals** in the menu on the left. The number next to it is how many replies are waiting.
2. Read the customer's question and the AI's reply side by side, and check which help article it used.
3. Press **Approve & send**, **Edit** to change it first, or **Reject** to throw it away and reply yourself.



The top of the screen shows the level above which replies send without a person. **Approve all high-confidence** approves every draft above that level at once.

If a ticket says **No matching answer — human required**, that is on purpose: no approved article covered the question, so it did not guess. Write or improve a help article so it can answer next time.

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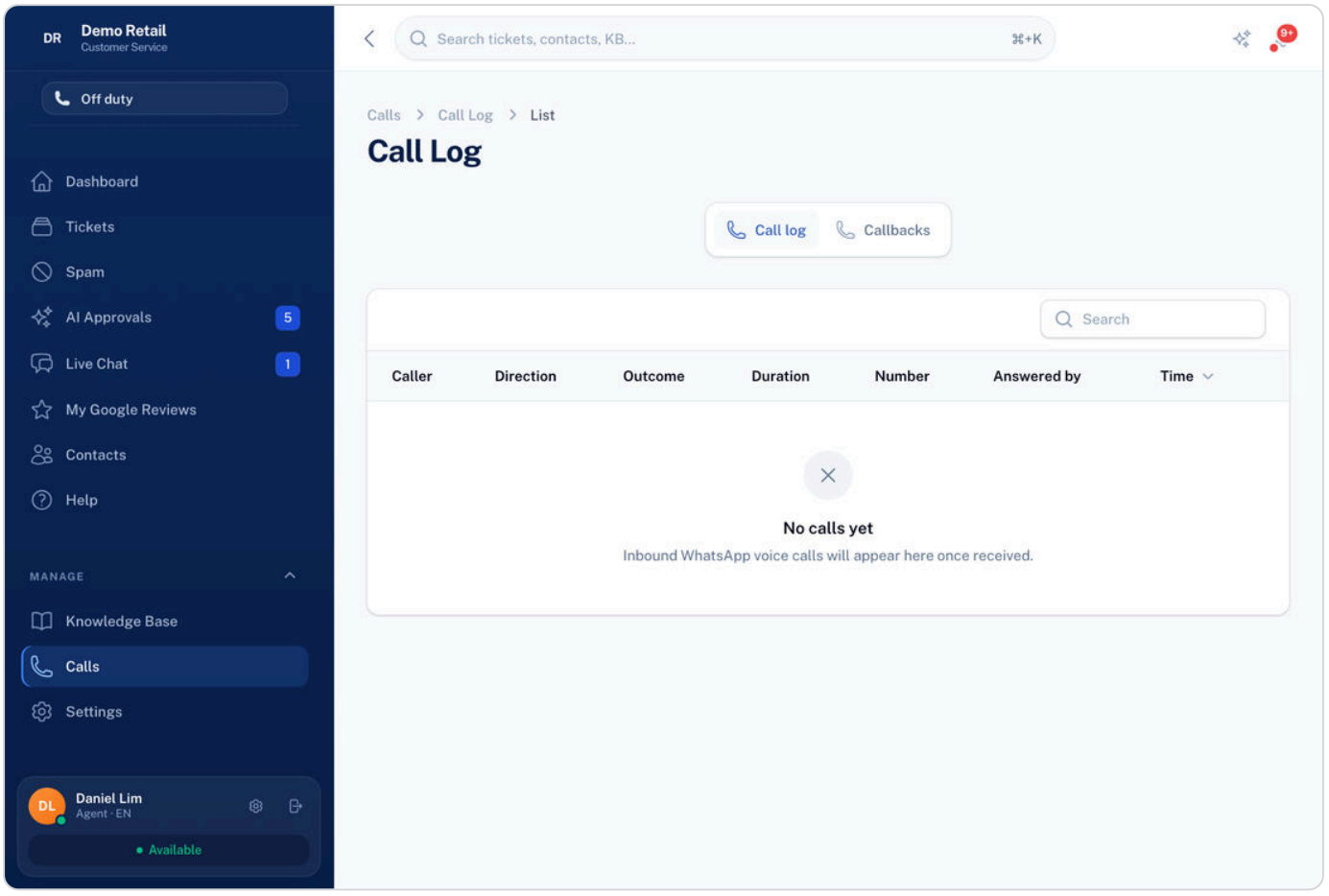
Answer WhatsApp calls

For: Agents

When calling is switched on for a WhatsApp number, customers can call it and you answer in the browser. No desk phone is needed.

1. Set the switch at the top of the menu to **On duty**, and allow the microphone when the browser asks.
2. A call rings with a pop-up. Press **Accept** to talk, or **Decline**.
3. Every call is saved to a ticket with its recording. After the call it is written out as text with a short AI summary. If the summary is missing, open the call in the ticket and press **Create AI summary**.

A missed call becomes a callback request. Open **Calls**, then **Callbacks**, take one, and call the customer back when you are free.



The picture was taken on a copy with no WhatsApp number connected, so no calls are listed.

If a call will not connect, check the microphone permission and that you are **On duty**. A strict office firewall can block calls; try another network.

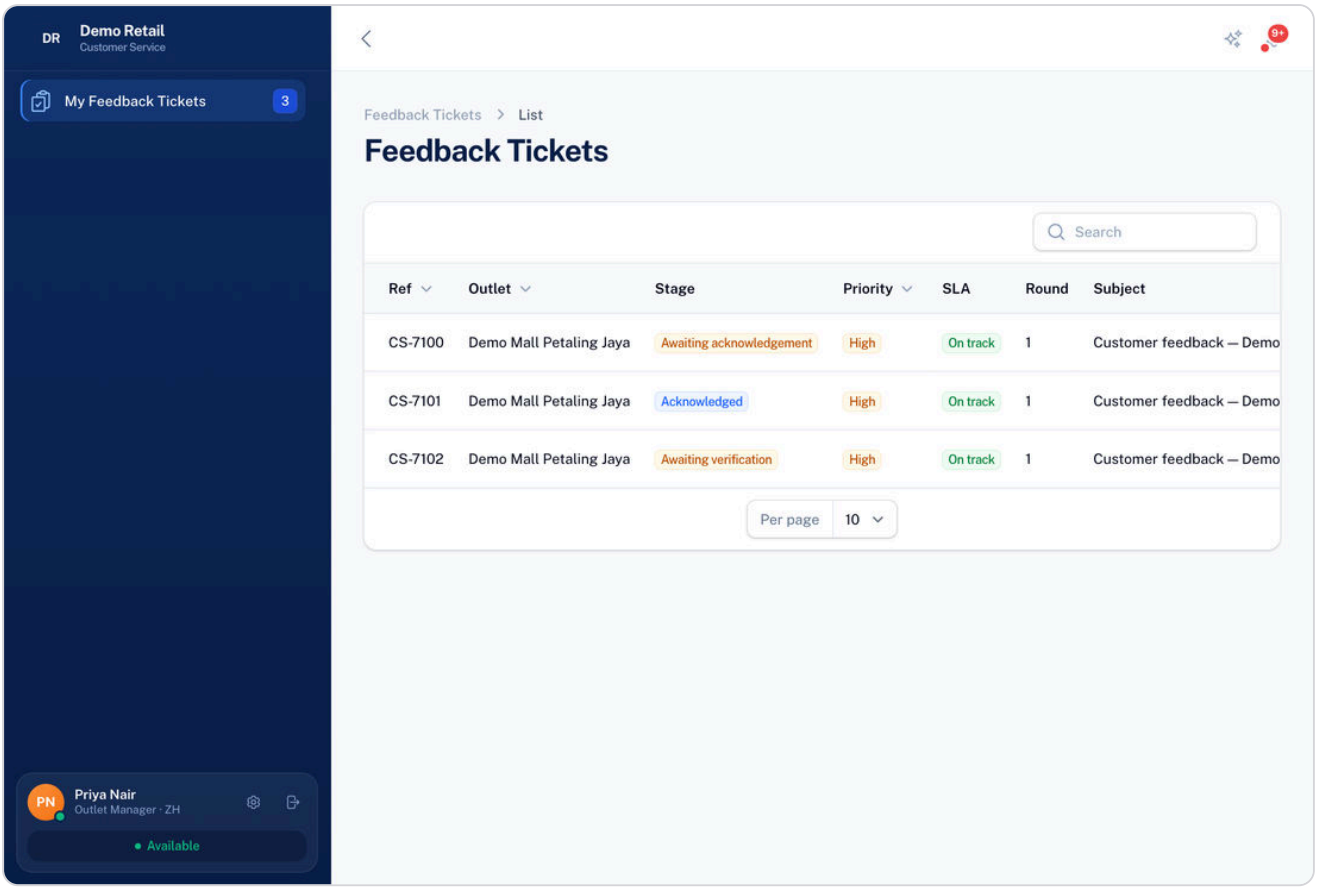
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Act on customer feedback at your outlet

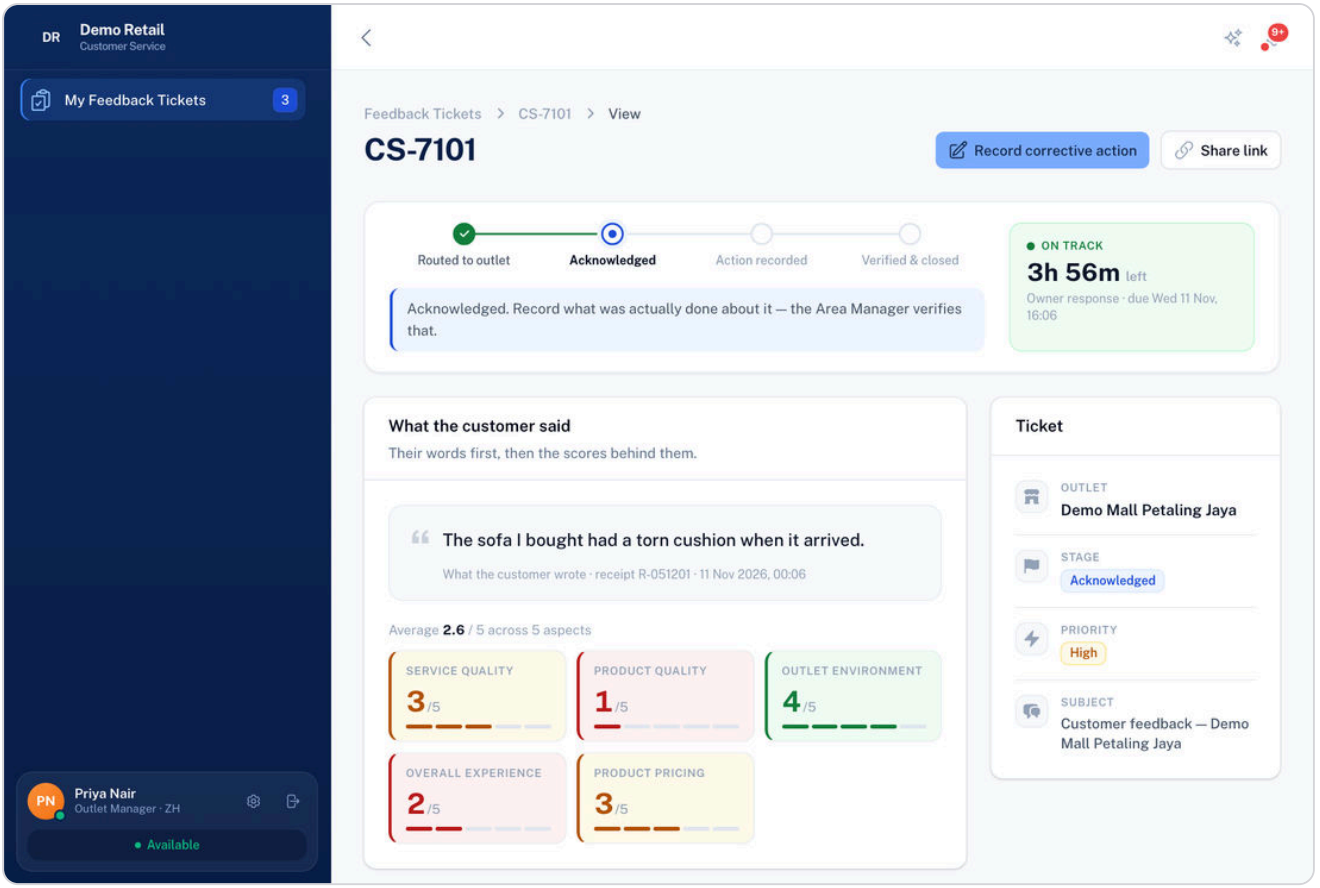
For: Outlet Managers

When a customer at your outlet gives a low score or complains in the survey, a feedback ticket comes to you. You see one menu item: **My Feedback Tickets**.

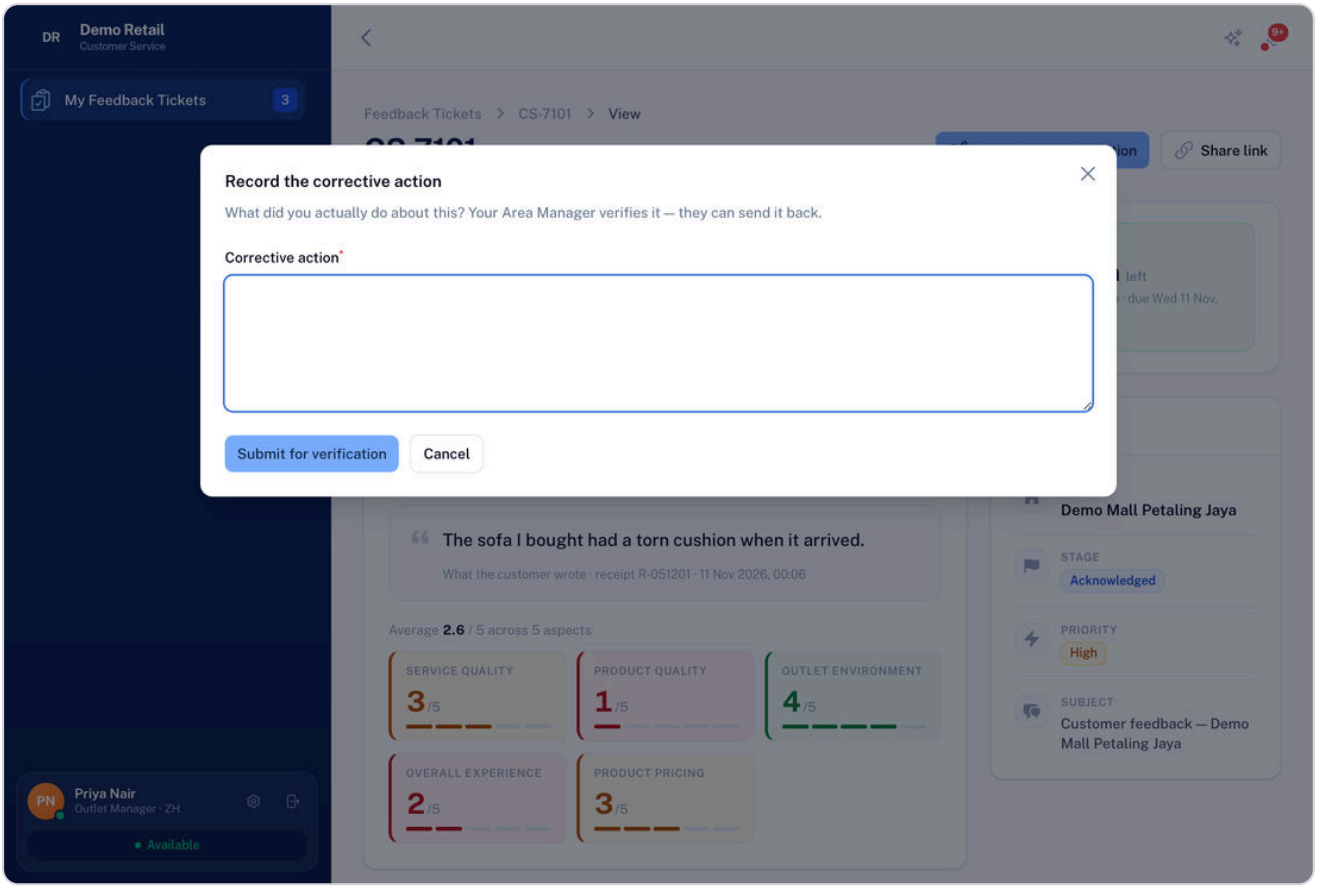
1. Open **My Feedback Tickets**. The **Stage** column says what is waiting, and **SLA** says whether you are still in time.



2. Open a ticket. You see the customer's words, their receipt number and their five scores.
3. Press **Acknowledge** to say you have seen it.



4. When you have dealt with it, press **Record corrective action**, write what was actually done, and press **Submit for verification**.



Your Area Manager then checks it. If they send it back, it returns to you as **Returned for rework** with their reason, and you record a new action.

The time left is shown on the ticket. If you miss the deadline, an alert goes out, and after that Customer service can close the ticket as **Owner non-responsive**.

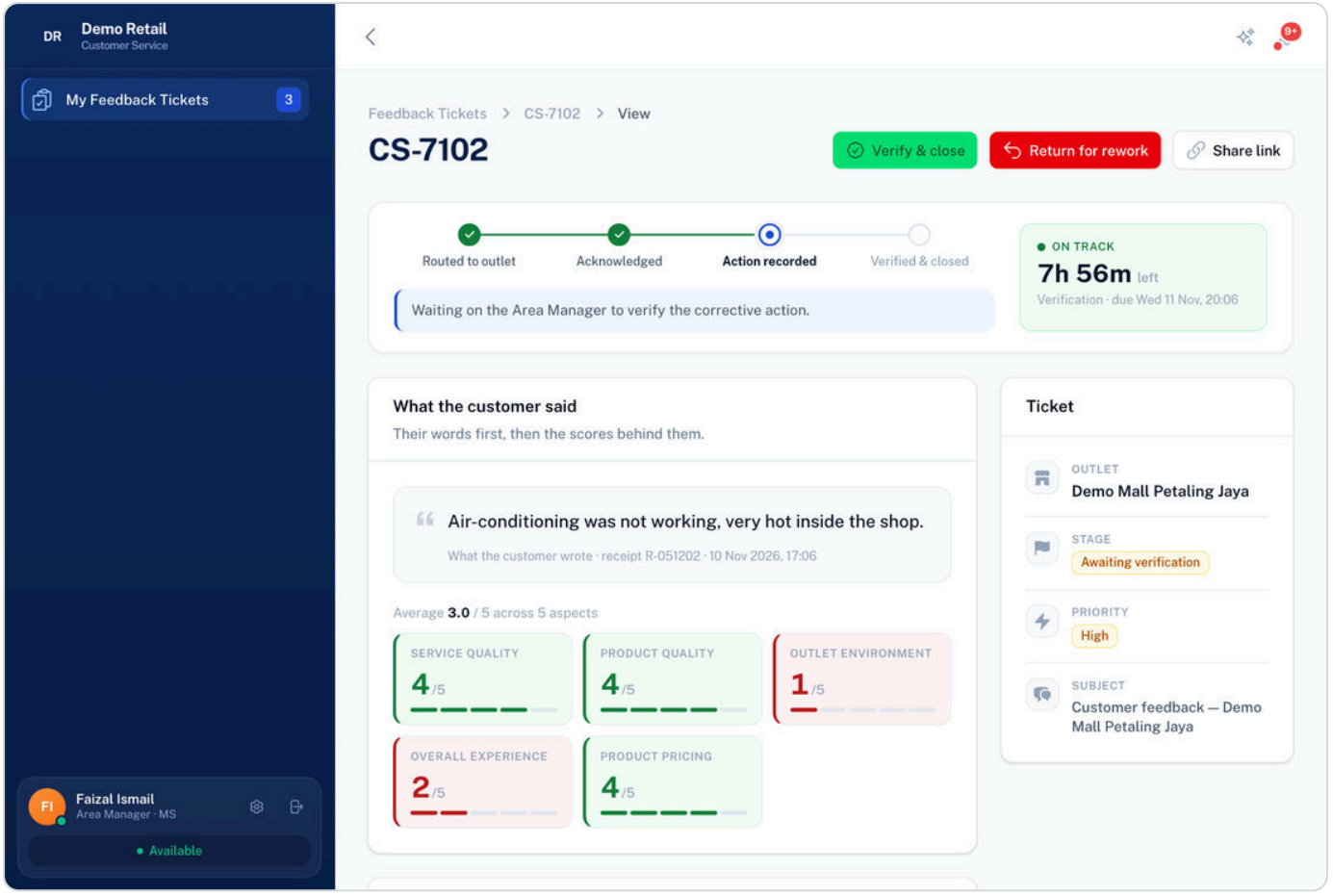
CUSTOMER SERVICE

Check what an outlet did

For: Area Managers

When an Outlet Manager records what they did about a customer's complaint, you check it. The person who recorded the fix can never be the one who signs it off.

1. Open **My Feedback Tickets** and open a ticket at **Awaiting verification**.
2. Read the customer's complaint and, under **Corrective action**, what the outlet did.
3. If it is enough, press **Verify & close**. You can add a note.
4. If not, press **Return for rework** and write **Why is this not enough?**. It goes back to the Outlet Manager.



Ask for an outlet audit

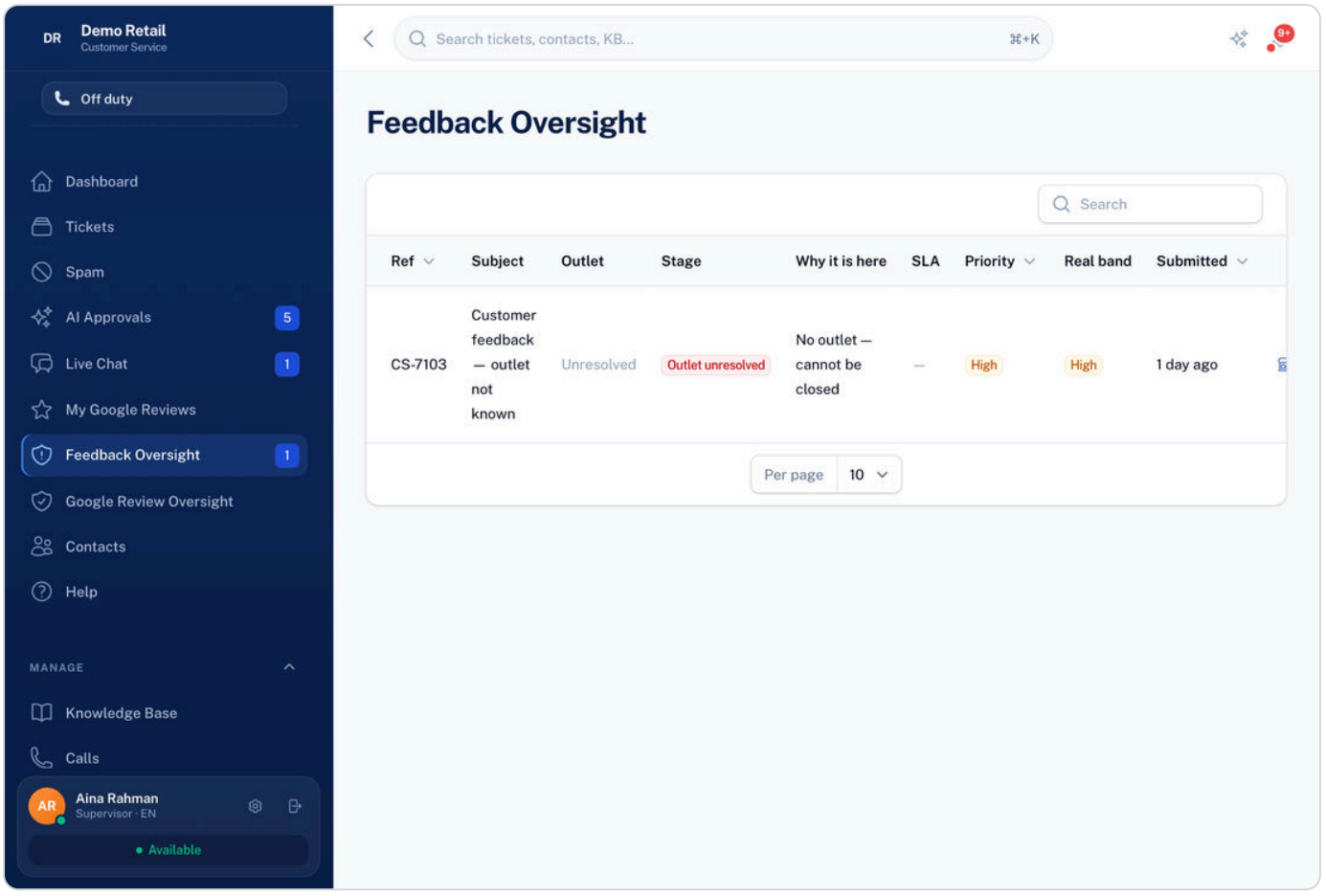
If an outlet needs a proper inspection, press **Request an outlet audit** on the ticket, choose **Audit must happen by**, and write **Why does this outlet need auditing?**. The request appears in **Outlet audit** as a one-off audit schedule. This button only shows once the link to Outlet audit is switched on.

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Watch for feedback that is stuck

For: Supervisors

Feedback Oversight lists feedback tickets that cannot move by themselves: no outlet, no owner, held for checking, or past their deadline. The **Why it is here** column says which.



On each row you can:

- **Assign outlet**: when the survey did not say which outlet it was. The ticket then goes to that outlet's manager.
- **Release hold**: for a ticket held for checking, for example because the same phone number sent many surveys.
- **Close: owner non-responsive**: when the outlet never answered.

Google Review Oversight does the same for Google reviews that came in as tickets: those with no agent, or past their deadline. **My Google Reviews** lists the Google review tickets given to you.

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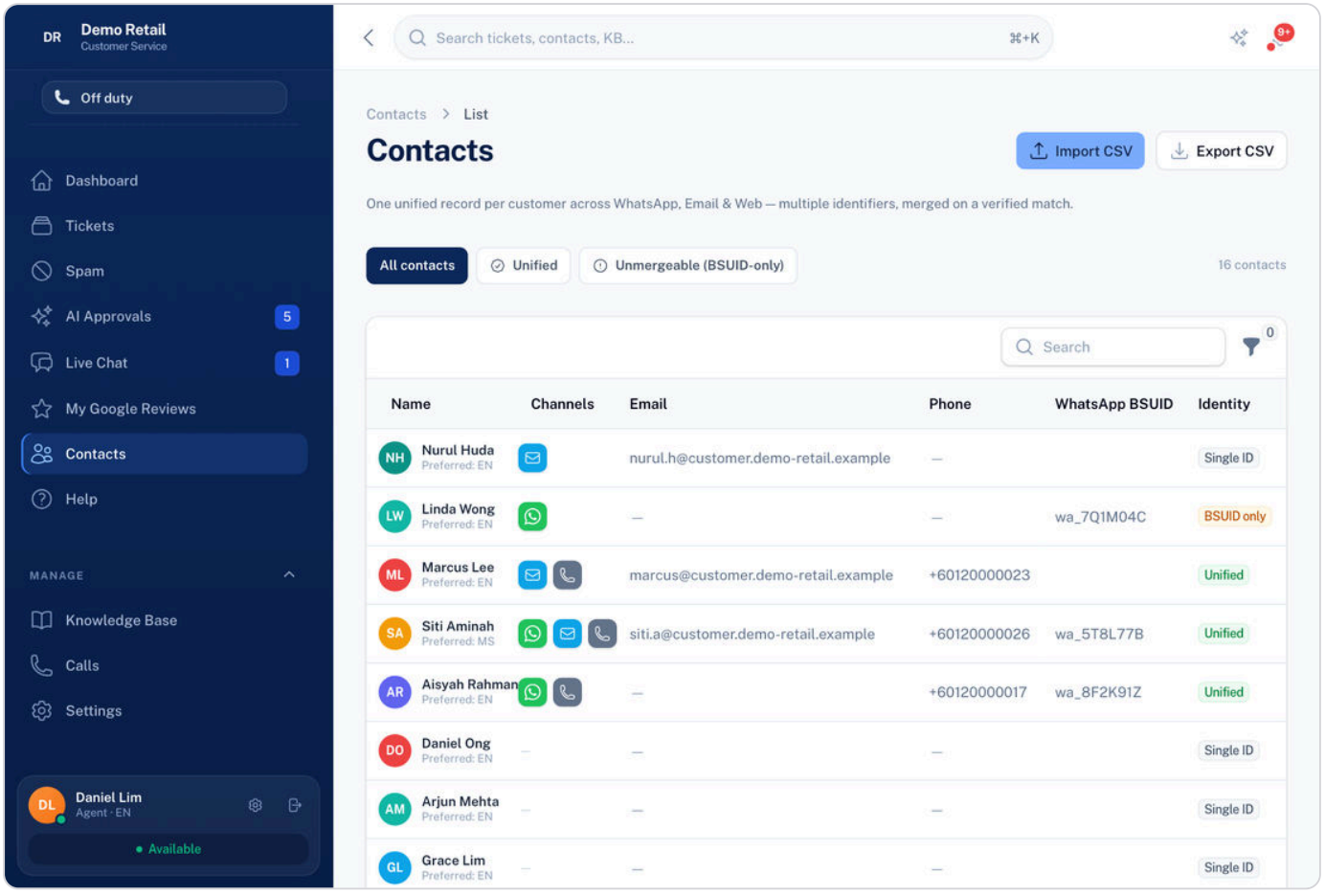
Keep customer details right

For: Agents

Each customer has one record, even if they have written from WhatsApp, email and chat. Correct details keep their conversations together.

1. Open **Contacts** in the menu on the left.
2. Press a customer to see and change their name, phone, email and history.
3. To bring in a list of customers, press **Import CSV**. To take the list out as a spreadsheet, press **Export CSV**.

New customers are added by themselves when they first write in, or with **Add New** when you open a ticket yourself.



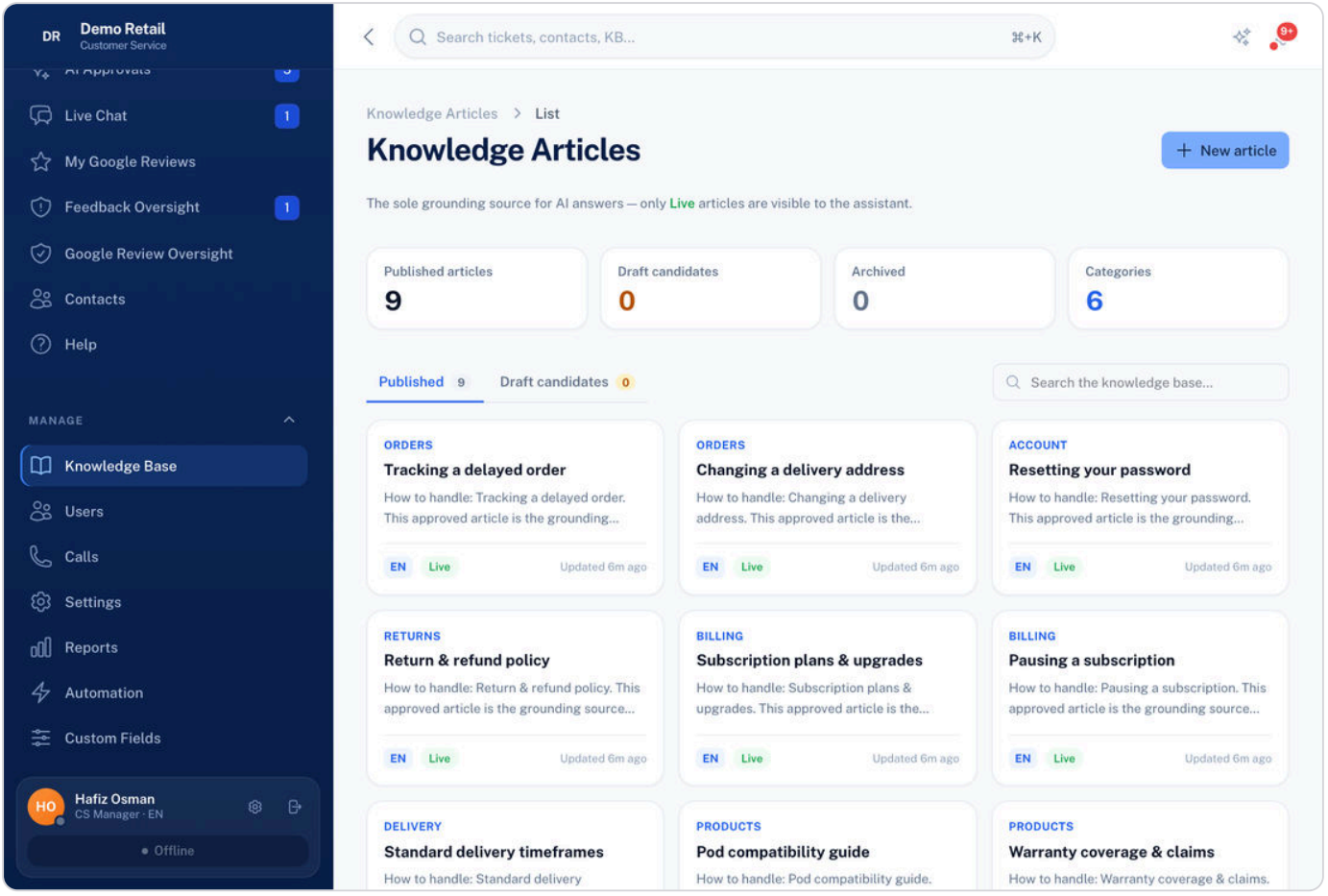
Changing a contact's details needs a permission some roles do not have.

Write help articles

For: CS Managers

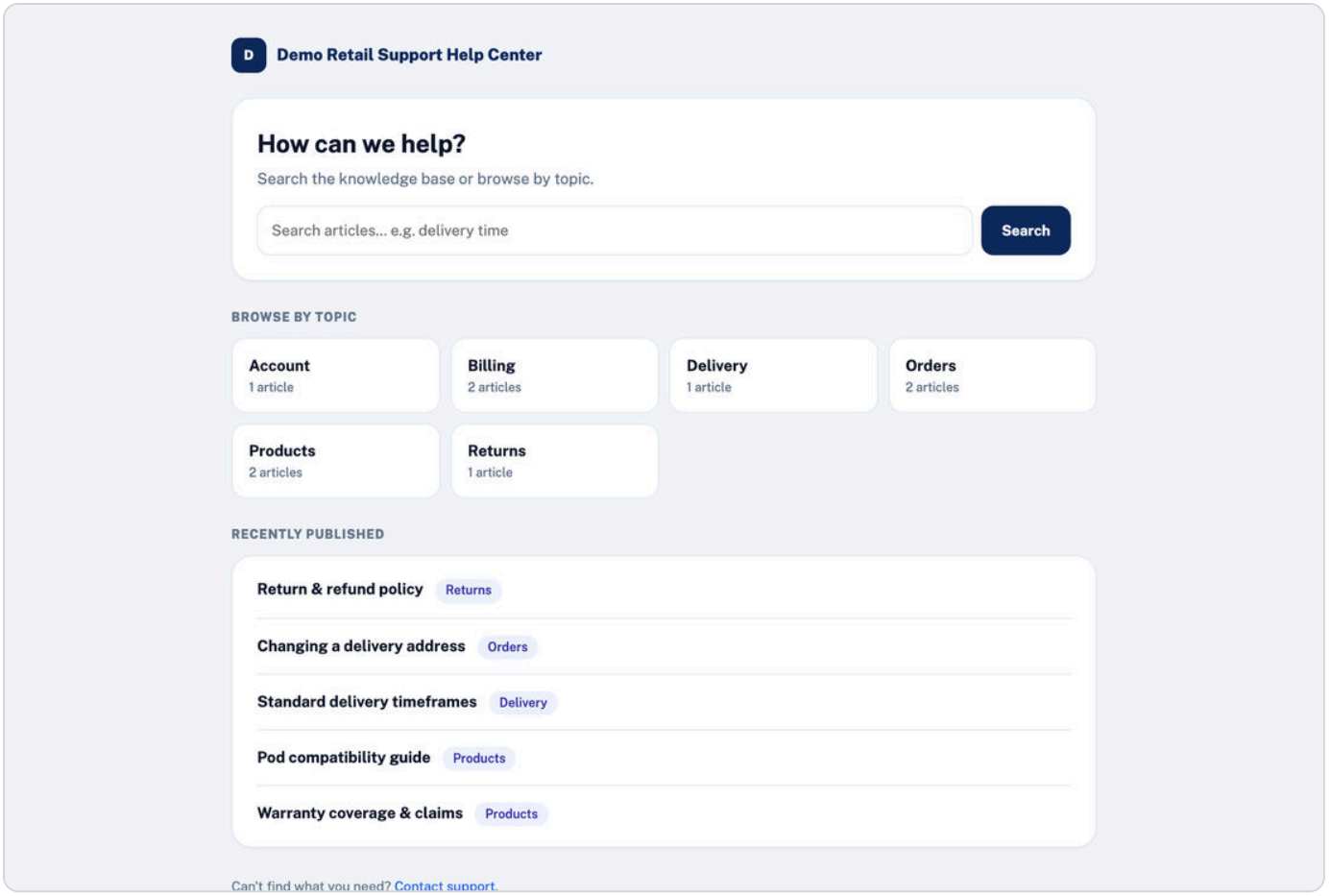
Help articles are the only source the AI answers from. The same articles appear in the public help centre, where customers can find an answer before they write in. Better articles mean better AI replies and fewer tickets.

1. Open **Knowledge Base** under **Manage**.
2. Press **New article**, or open an existing one to change it.
3. Fill in the **Title**, **Category**, **Language** and **Body**. Write it clearly.
4. Set **Status** to **Approved** and press **Create**. Only approved articles are used by the AI and shown to customers. **Draft** articles are not.



Under **Attachments**, press **Add document** to attach a PDF, Word, Excel or CSV file, such as a price list or a policy. Its text is read out of the file and added to the article, so you do not need to retype it.

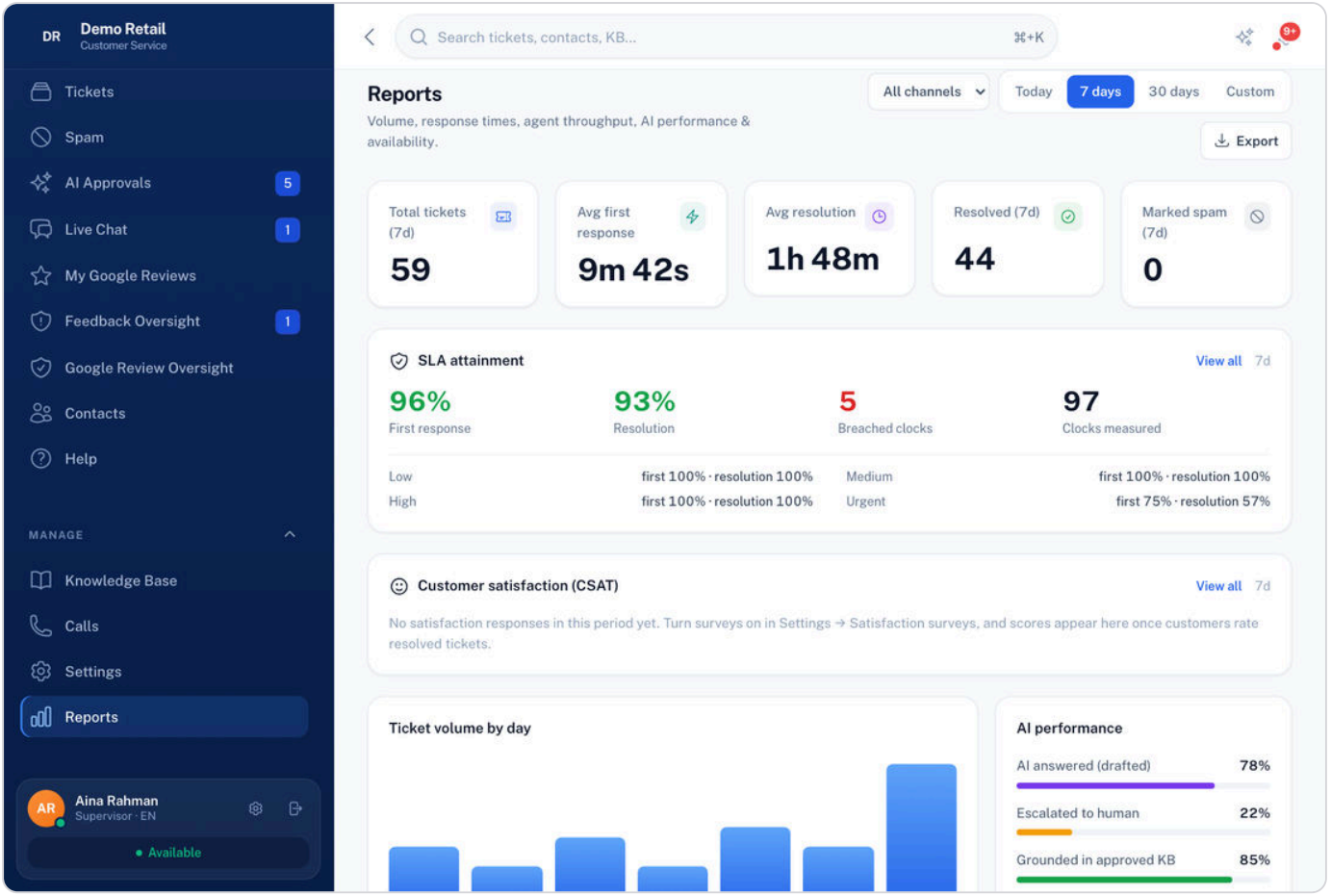
Reports has a **Knowledge gaps** panel: questions the AI could not answer. Each one is a candidate for a new article.


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Demo Retail Support Help Center
How can we help?
Search the knowledge base or browse by topic.
Search articles... e.g. delivery time
Search
BROWSE BY TOPIC
Account
1 article
Billing
2 articles
Delivery
1 article
Orders
2 articles
Products
2 articles
Returns
1 article
RECENTLY PUBLISHED
Return & refund policy
Returns
Changing a delivery address
Orders
Standard delivery timeframes
Delivery
Pod compatibility guide
Products
Warranty coverage & claims
Products
Can't find what you need? Contact support.

Read the reports

For: Supervisors

1. Open **Reports** in the menu on the left.
2. Choose the period at the top: **Today**, **7 days**, **30 days** or **Custom**, and the channel.
3. Press **Export** to take the numbers into a spreadsheet.



What it shows:

- how many tickets came in, how fast they were first answered and resolved, and how many were spam
- **SLA attainment**: how often the team met its response and resolution targets, and how many missed
- **Customer satisfaction (CSAT)**: the average rating from the short survey sent after a ticket is resolved. It stays empty until surveys are switched on in **Settings**.
- how much the AI answered by itself and how much it passed to people
- **AI usage & estimated cost**, for roles allowed to see it

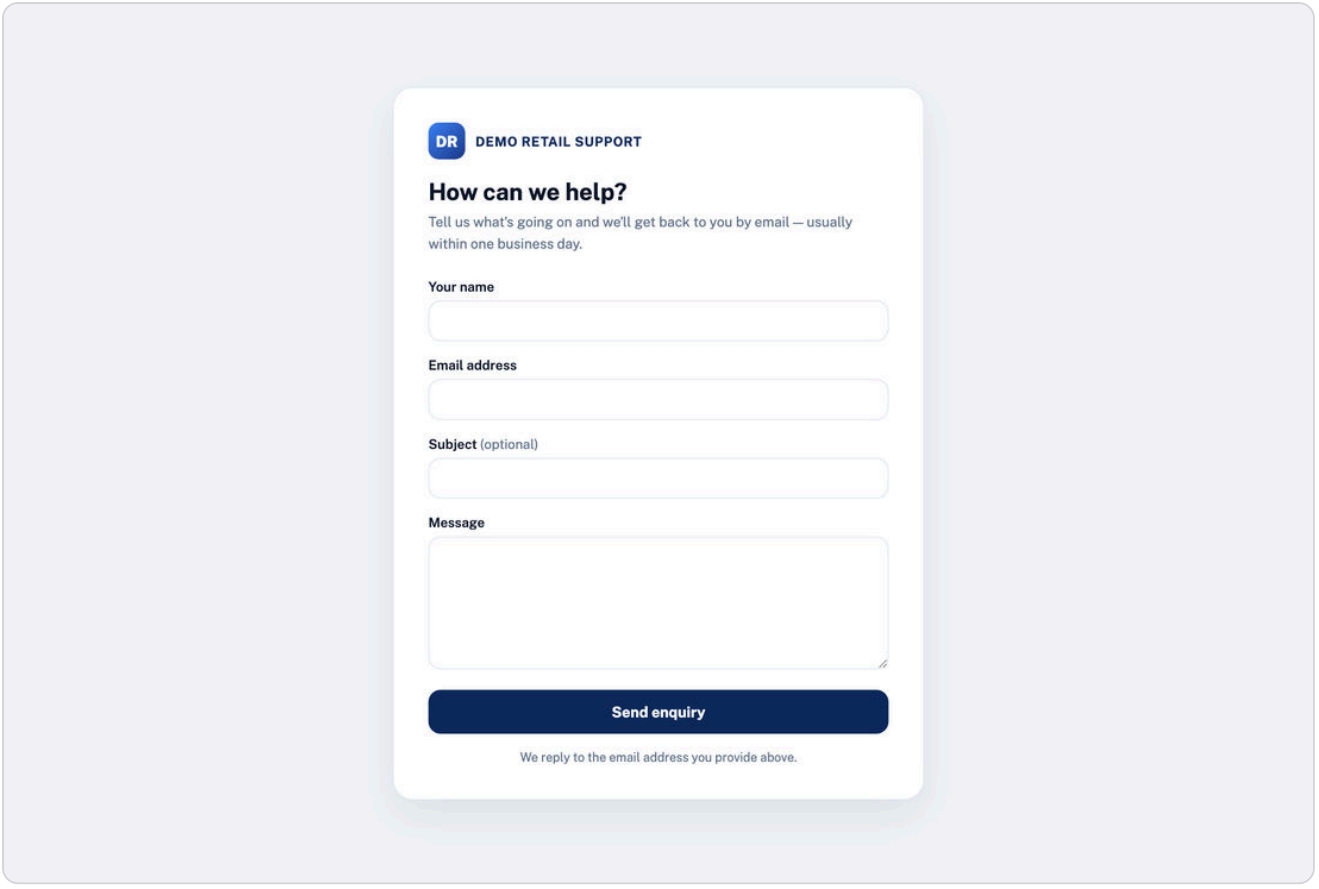
CUSTOMER SERVICE

What customers see

For: Everyone

Customers use these pages without an account.

- **The support form.** A customer types their name, email address, an optional subject and a message, and presses **Send enquiry**. It becomes a ticket, and replies go to them by email.

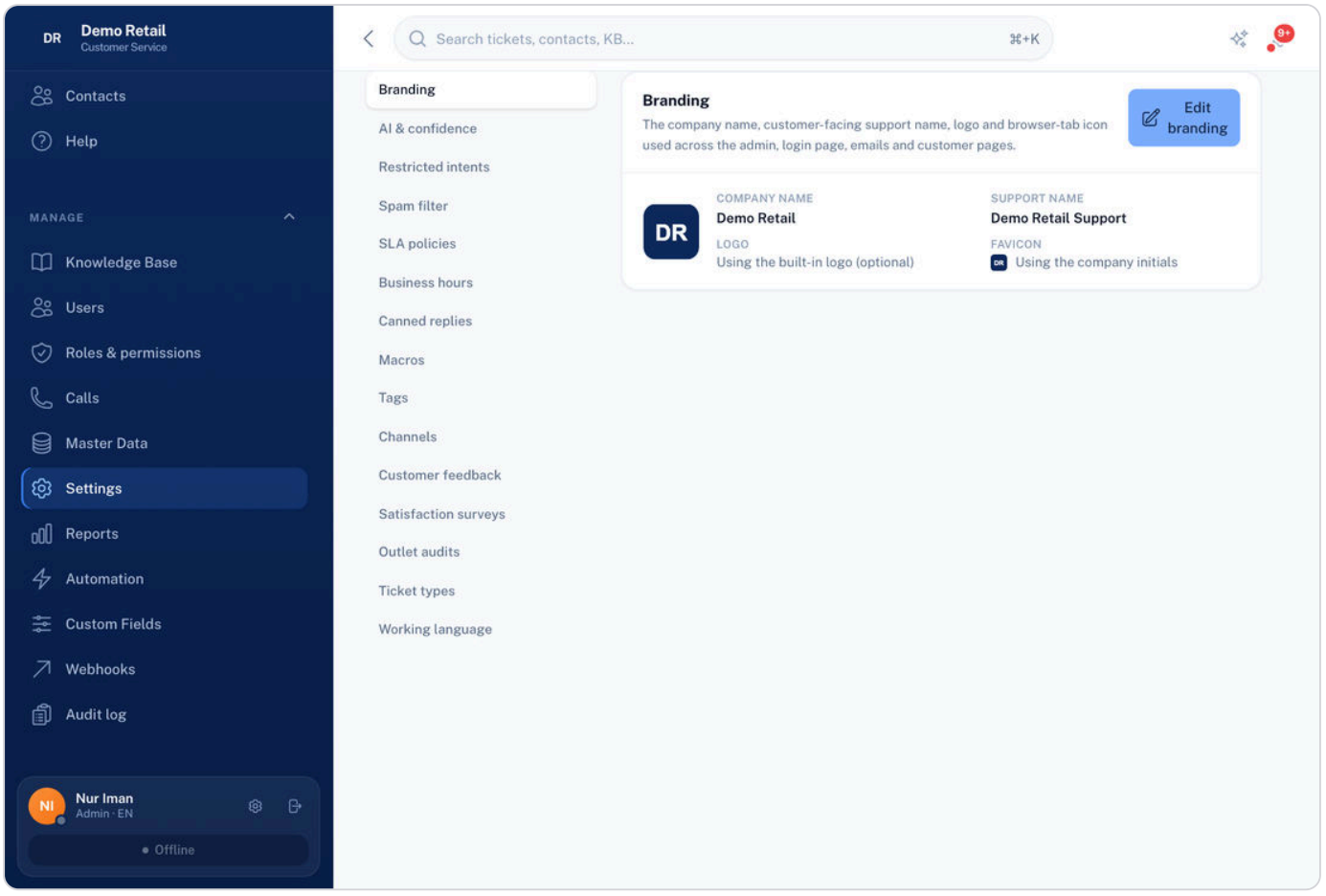


- **The help centre.** Customers search the help articles or browse by topic. Only approved articles appear.
- **The chat bubble** on your website. Visitors can chat with you, and sign in with a one-time code by SMS or WhatsApp to see and continue past chats on any device. A short check guards the first message against spam.
- **Out of hours**, everyone gets one automatic message saying you are closed and when you open again, if that is switched on.

Change how the system works

For: Admins

Open **Settings** under **Manage**. Each section is listed on the left. Changes apply to everyone as soon as you save.



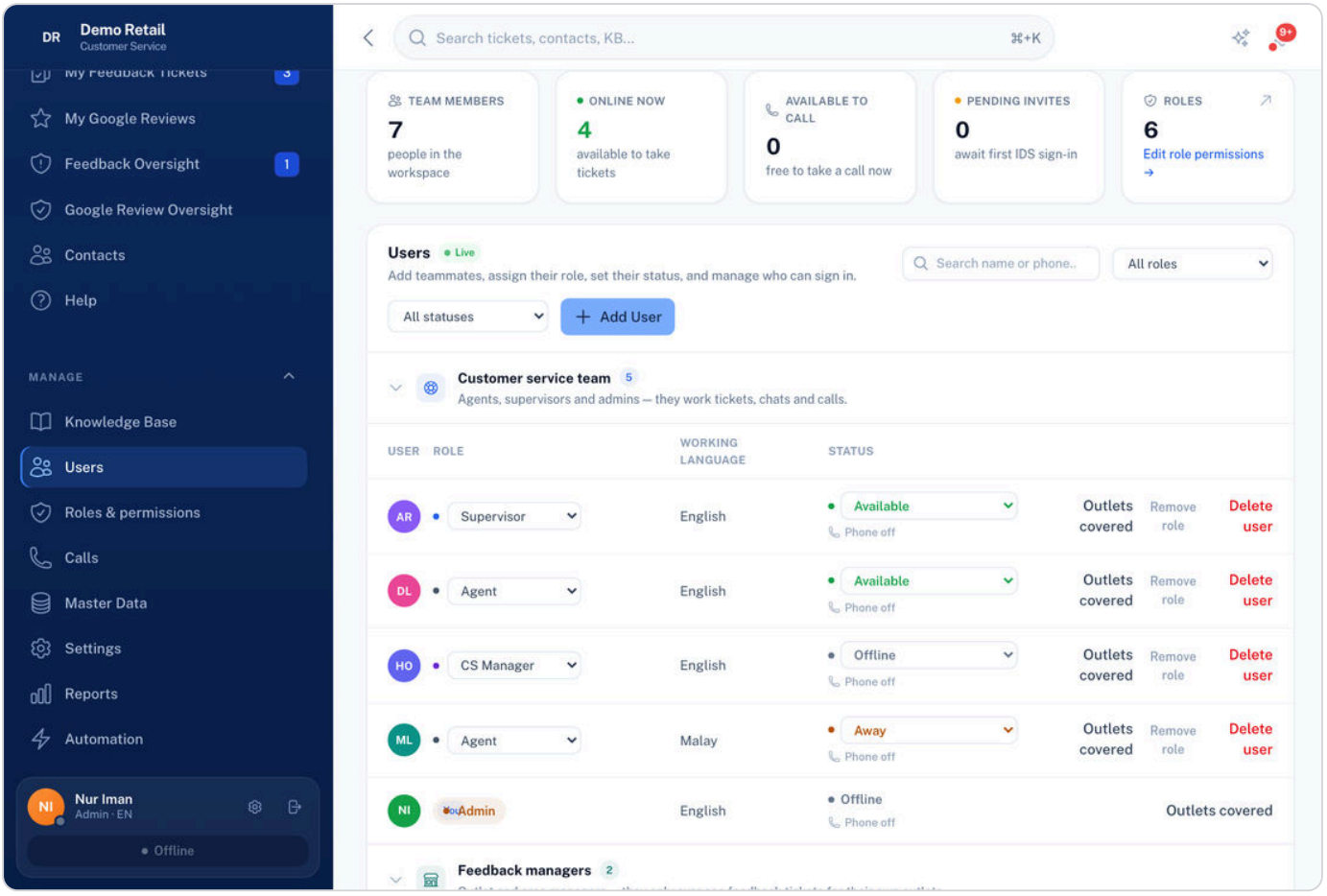
Section	What it sets
Branding	Your company name, the name customers see on replies, your logo and the browser-tab icon. Without a logo, your initials are shown in the menu.
AI & confidence	How sure the AI must be before a reply goes out without a person, and whether it may send by itself at all.
Restricted intents	Words that always send a message to a person, however sure the AI is.
Spam filter	How junk messages are caught.
SLA policies	Your target times for first reply and for resolving, by priority. They can count only opening hours.

Section	What it sets
Business hours	Opening hours and public holidays, and the automatic out-of-hours reply.
Canned replies, **Macros**, **Tags**	Saved replies, saved sets of steps, and labels for tickets.
Channels	WhatsApp numbers, email mailboxes and the chat bubble for your website.
Customer feedback	The link to the Customer feedback module.
Satisfaction surveys	The short rating sent to customers after a ticket is resolved.
Outlet audits	The link to the Outlet audit module, and when audits are requested automatically.
Ticket types	The kinds of ticket, such as question or incident.
Working language	Your own language for replies and for the translated view of customer messages.

Give people access

For: Admins

1. Open **Users** under **Manage**. The top shows how many people are online and free to take calls.
2. Press **Add User** to invite someone, and choose their role.
3. To change someone's role, use the role drop-down on their row. Supervisors and above can also change a person's status here, for example to **Offline** when their shift ends.
4. When someone leaves, press **Delete user** on their row.

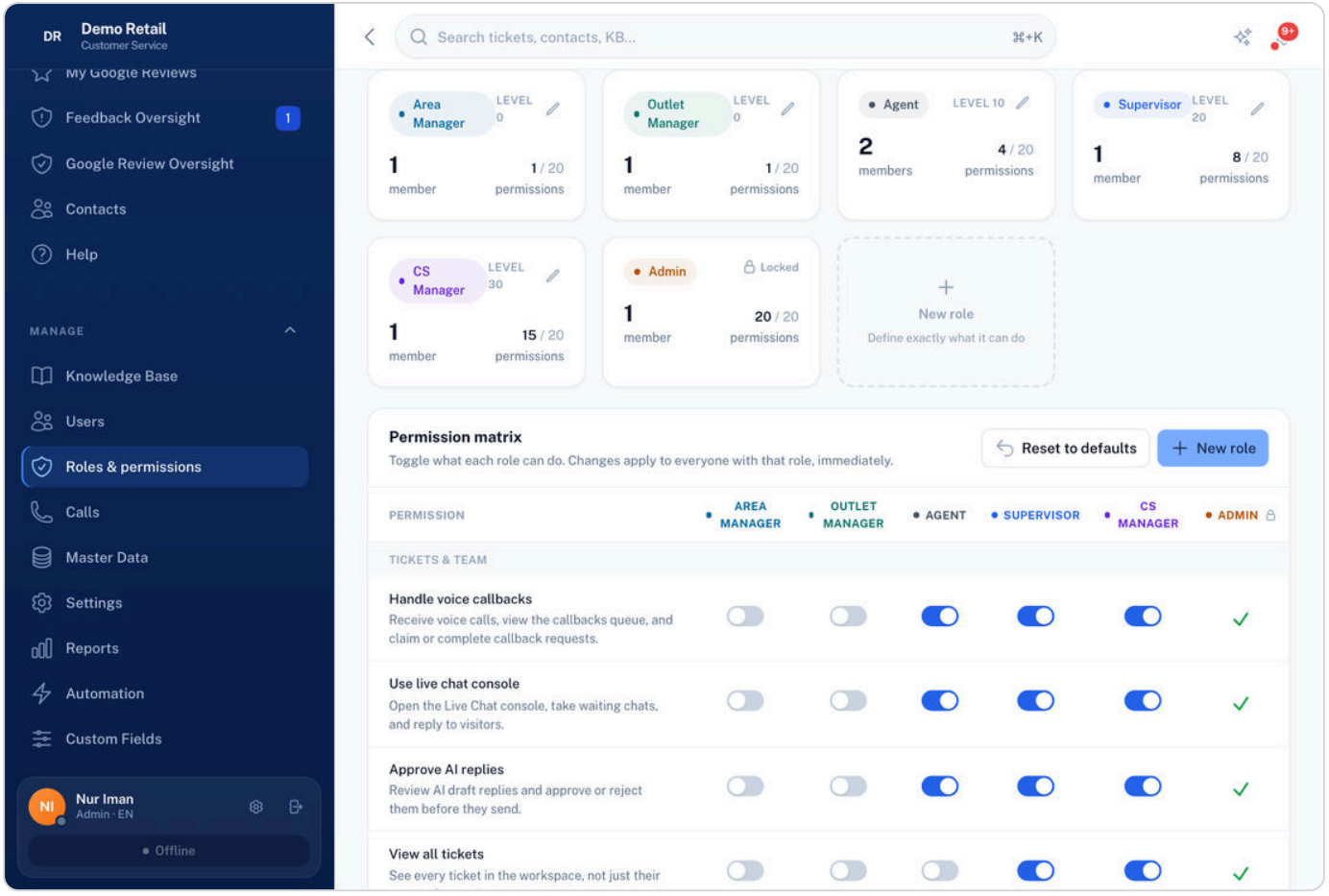


Outlet Managers and Area Managers are listed separately under **Feedback managers**, with the outlets they cover.

Change what a role can do

1. Open **Roles & permissions** under **Manage**.
2. Switch each permission on or off for each role in the table. Changes apply at once to everyone with that role.

3. Press **New role** to make your own.



You cannot give anyone more than your own level. Give **Admin** sparingly: it can do everything, including settings and people. **Supervisor** or **CS Manager** suits most team leaders.

Audit log under **Manage** shows who changed what, and when.

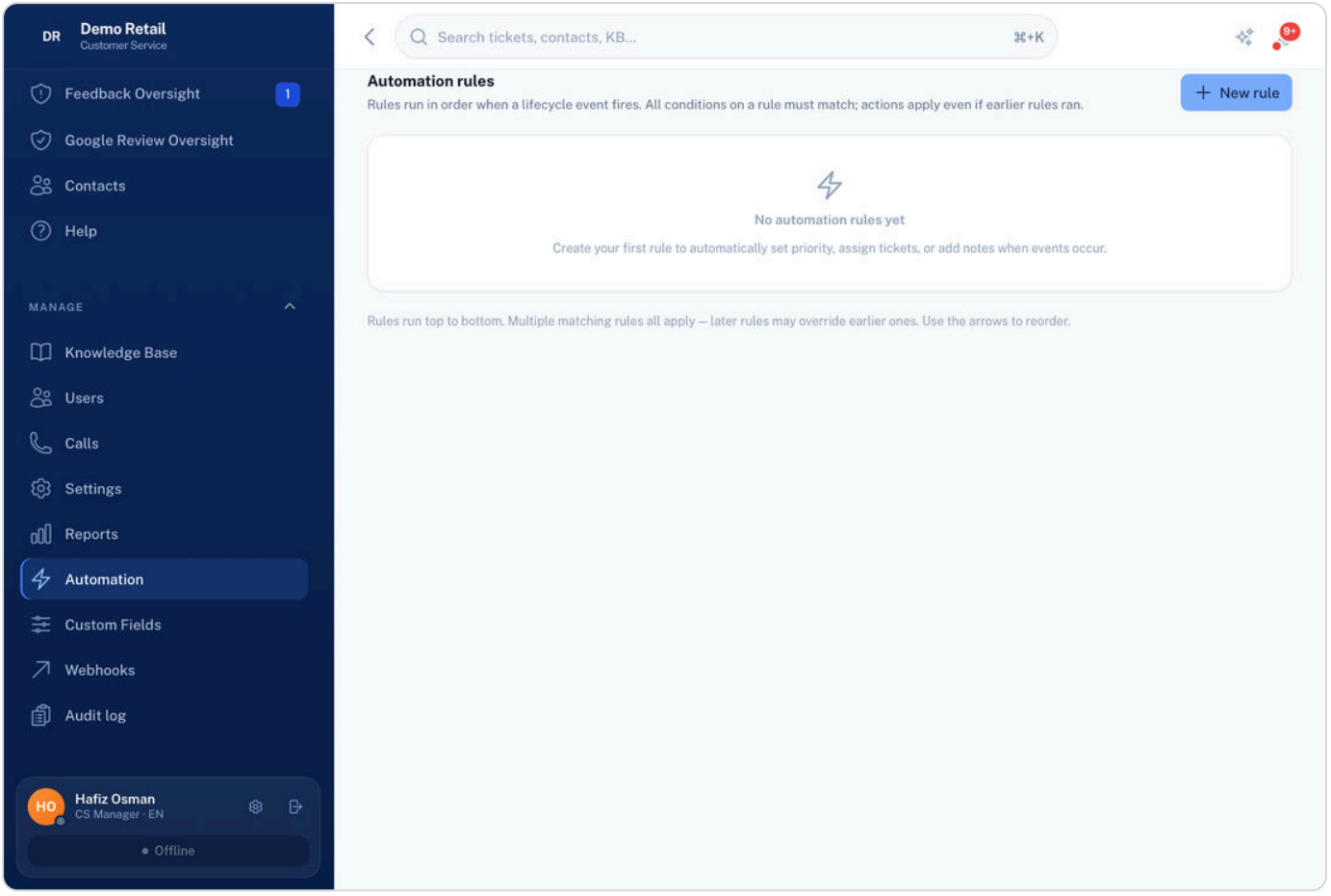
CUSTOMER SERVICE

Set up automatic rules, extra fields and links

For: CS Managers and Admins

Automatic rules

1. Open **Automation** under **Manage**.
2. Press **New rule**. Choose a condition, such as the ticket type or channel, and an action, such as giving it to someone, adding a tag or setting the priority.
3. Rules run from top to bottom, and every matching rule applies. Put the most specific rules first.



Extra fields

Custom Fields under **Manage** adds your own fields to tickets or contacts: text, number, drop-down, on/off and more. Mark a field **Show on web form** to ask customers for it on the support form.

Links to other systems

These are for your technical team.

- **Webhooks** under **Manage** sends ticket events to another system. Copy the signing secret when it is shown: it is shown only once. If it is lost, delete the endpoint and make a new one.
- Other systems can also read tickets and contacts, and add notes, through an access key your technical team creates. There is no screen for this.