Customer assistance

Overview SaaS 3.7.0+

Sometimes call centre staff needs to assist the customers in placing the order or encouraging the sale.

In order to achieve this sales staff can operate in Admin app, however to improve the experience and allow sales staff to see it "through the eyes of customers" they also login into frontend.

In order to allow this feature the shop must have:

- **SHOP_SF_LOGIN_MANAGER** attribute set to true
- All managers' accounts that should be allowed to login as customers must have **ROLE_SMCALLCENTERLOGINSF** role.
- All managers' accounts that should be allowed to register customers must have **ROLE_SMCALLCENTERREGISTERCUSTOMER** role.
- Manager account email must be unique (i.e. No customer account should exist with the same email)

Assistance options

Review details

Logging in as a manager grants access to single menu option initially "Customers" where a manager can search for the customer account they wish to login on behalf of.

All manager accounts that should be allowed to login on behalf of customers must have **ROLE_SMCALLCENTERLOGINONBEHALF** role.

Manager has full feature access to all capabilities that the customer would have, including placing orders. In case of placing orders an audit record is saved with the order, noting the manager's name and email.

YCE Customer Assistance: assistance "on behalf" (3:35)
Play
Overview of customer assistance features
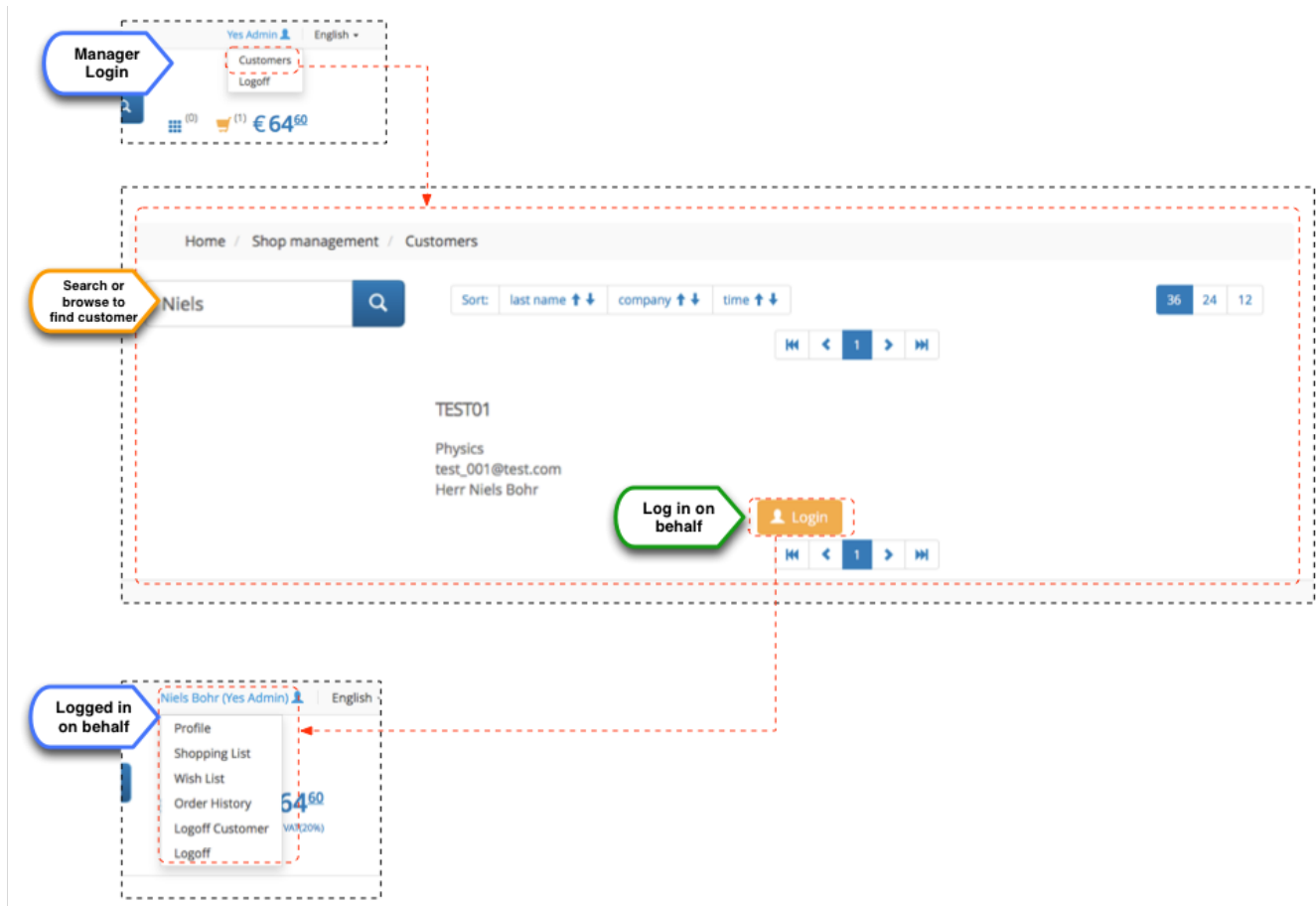
Managed lists

Managed lists allow a manager who has logged in on behalf of customer to save currently populated cart as a special wish list, referred to as managed list.

Creation of managed list triggers an email notification (**managedlist-created**) to the customer that a managed list had been created for them.

When customer follows the link specified in an email (or clicks on managed list on the cart page) they are able to review this list and either add it to cart or reject it.

If customer adds the list to cart the items in the order will retain reference to the original list. The list itself will be removed as soon as the order will get into processing (more specifically into os.pending state).

If customer chooses to reject the list it is removed and an email notification (**adm-managedlist-rejected**) is sent to the manager who created this list originally.
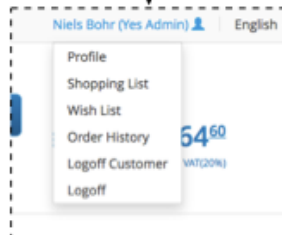
In order to use this feature:

- Manager accounts must have **ROLE_SMCALLCENTERCREATEMANAGEDLISTS** role.
- Customer they logged in on behalf of should have correct customer type for which shop attribute: **SHOP_SF_MANAGED_LIST_TYPES** must be activated.

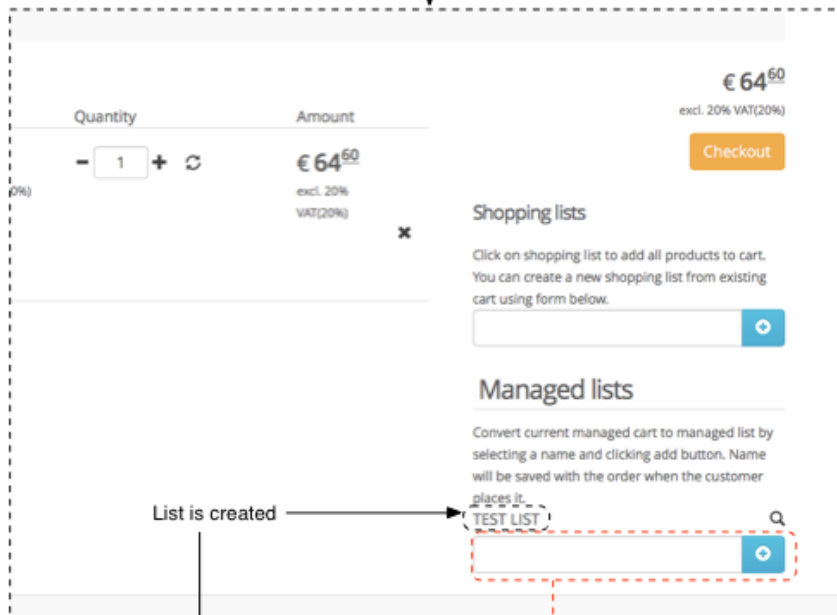YCE Customer Assistance: managed lists (a.k.a. email recommendations) (5:10)
Play
Overview of recommendations via email
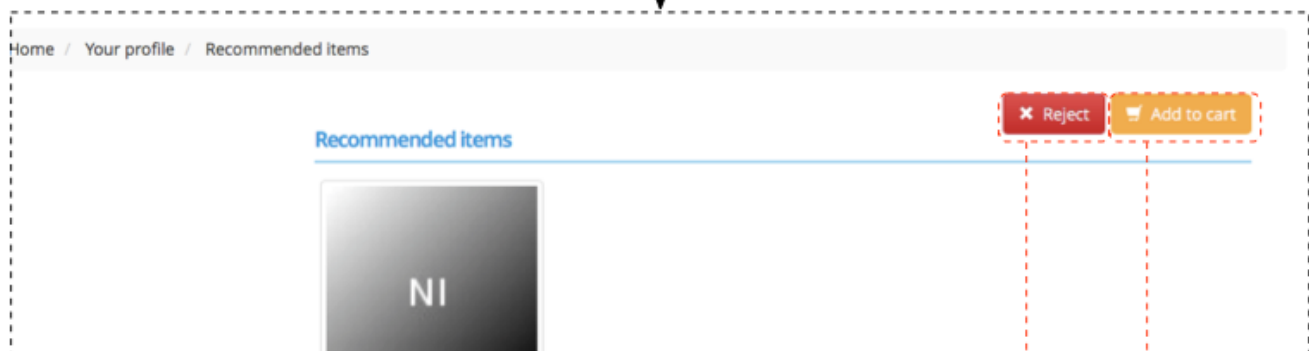
Manager logs in as a customer

Niels Bohr (Yes Admin) 👤 | English

Profile
Shopping List
Wish List
Order History
Logoff Customer
Logoff

64⁶⁰
VAT(20%)

Browse the shop as populate cart

€ 64⁶⁰
excl. 20% VAT(20%)

Checkout

Quantity

− 1 + ↻

Amount

€ 64⁶⁰
excl. 20% VAT(20%)

✕

Shopping lists

Click on shopping list to add all products to cart. You can create a new shopping list from existing cart using form below.

⊕

Managed lists

Convert current managed cart to managed list by selecting a name and clicking add button. Name will be saved with the order when the customer places it.

List is created → TEST LIST 🔍

⊕

Type managed list name and click add to create it

Email is sent to customer → Customer logs in

Home / Your profile / Recommended items

Recommended items

✖ Reject   🛒 Add to cart

NI

Targus TCB001EU Nylon

€ 64^{60}

excl. 20% VAT(20%)

Rejection reason

Don't like it

No   Reject

Email is sent
to manager

Customer accepts the
recommendation and
places the order

Register new customers

In some shop setups it is desired to restrict direct registration from the frontend by customers (e.g. special verification required or shop is only for internal use). In order to help shop managers expedite registration process they are able to use registration form features even without declaring supported customer types. Declared customer types would be available to managers to complete the registration process with a single form that contain full set of fields required for a complete profile of required customer type.

In order to use this feature manager account must have **ROLE_SM CALLCENTERREGISTERCUSTOMER** role assigned, which will enable all declared registrations forms (see Cookbook - Forms Management for more information). All forms will be available even without listing them in **SHOP_CUSTOMER_TYPES**, which makes them hidden for regular customers.

Note the you cannot register the following types as a manager: **EMA IL**, **B2G** and **MGR**, which are reserved internal types.

YCE Customer Assistance: hidden types customer registration (3:41)
Play
Overview of customer assistance features