



WhatsApp MoneyPhone Manual

MoneyPhone B.V.

Taizya Ndawa

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Getting Started

How to log in to Inbox

If you're an Inbox **agent**, you need to go directly to inbox.messagebird.com and log in with your email address and password. If you are experiencing problems logging in, please contact MoneyPhone at info@money-phone.com.



Welcome back to Inbox

Email address

Password

[I forgot my password](#)

Log in

WhatsApp Agents

There can be multiple agents in Inbox. The main responsibility of an agent is to work on tickets.

Agents have access to:

- The Agent UI
- Contacts

Agents can:

- Work on and resolve tickets
- Search and view tickets
- Search and view contacts
- Create and edit contacts

Using The Inbox

An Inbox ticket provides your agents with a detailed record of a conversation between your organization and an applicant.

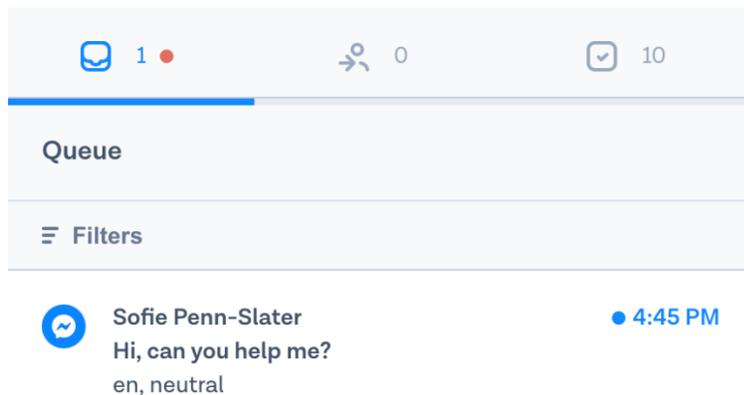
Find out about the four basic stages of a ticket:

1. ticket creation
2. accepting a ticket
3. working on a ticket
4. resolving a ticket

Ticket creation

A ticket is created when an applicant sends a message to your company via a channel that's been connected to Inbox, such as WhatsApp or SMS.

This new ticket will be added to a queue in Inbox, where it will stay until an agent accepts it. The screenshot below shows a ticket waiting in a queue.



When a ticket arrives in a queue, a notification is sent to all online agents to let them know that an applicant is waiting for help.

By default, a ticket will include the following information:

- Your applicant's message
- The date and time that the message was sent
- Your applicant's contact details
- The channel they've used to contact you
- Previous conversations (if they've contacted you before)
- Alternative channels of communication (if they've contacted you before on a different channel)

You can also use built-in automation to add additional information to incoming tickets:

- Language recognition to identify what language your applicant is speaking
- Sentiment analysis to detect your applicant's mood

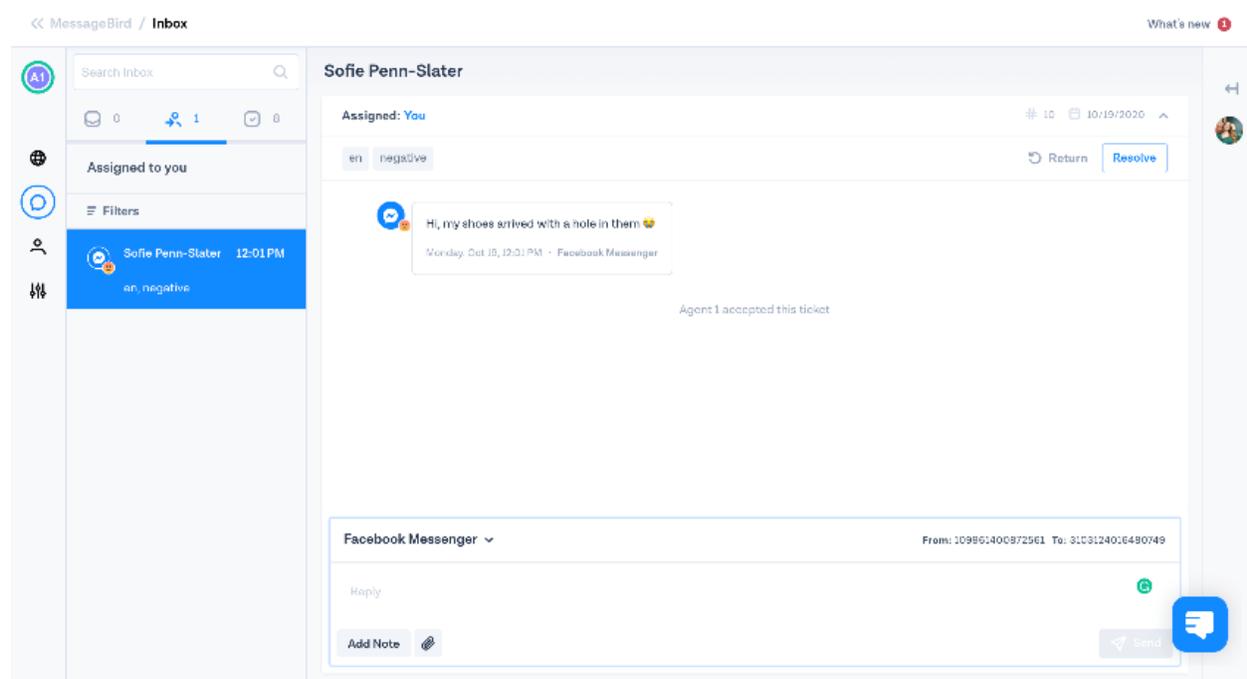
Agents can manually add tags to tickets as they talk to applicants. Find out more under **Working on a ticket**.

Accepting a ticket

To accept a ticket, just click on the ticket in the queue. It will automatically move to 'Assigned to you', ready for you to start working on.

If an applicant has been in touch with you before, the full conversation history will be displayed in the ticket. To see it, just scroll up, or click on the applicant's name!

In the screenshot below, you can see what a ticket looks like once you have accepted it. You can also see the **language** of the message displayed as a tag, and the **sentiment** or **mood** displayed as both a tag and as an emoji.



If you decide that you can't work on that ticket, or if you accepted it by mistake, you can click **Return** to place the ticket back in the queue. This will prompt a notification to be sent to all online agents, just like when a new ticket arrives. When a ticket is returned, this is recorded in the conversation history.

Working on a ticket

Use the text field to chat with your applicant by writing a response in the text field, or by using a canned reply. You can insert emojis by copy and pasting them into your message, and attach and send media by clicking on the attachment icon.

When you're ready, click **Send** to send your message!

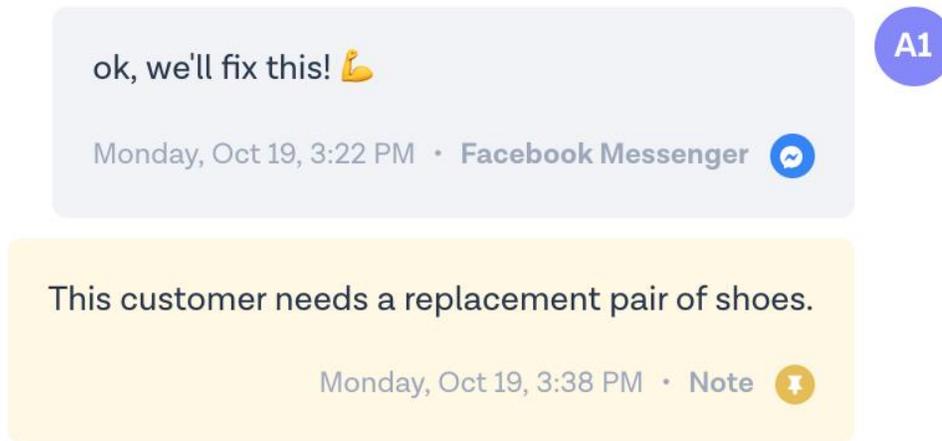
Adding manual tags

Agents can manually edit and add tags to tickets as they talk to applicants. Tags are a good way to add more information and context to a ticket. For example, a tag can be added to explain why an applicant has been in touch, which is useful for creating detailed reports.

Creating internal notes

Create internal notes to provide yourself and other agents with additional information, such as "Don't close this ticket until the applicant replies".

You and other agents will be able to see what you've written, but your applicants won't. Notes can't be deleted and will be included in the conversation history.



The screenshot shows a chat interface. At the top right, there is a blue circular badge with the text "A1". Below it is a light blue message bubble containing the text "ok, we'll fix this! 💪". Underneath the message bubble, it says "Monday, Oct 19, 3:22 PM • Facebook Messenger" with a small Messenger icon. Below the message bubble is a yellow note bubble containing the text "This customer needs a replacement pair of shoes." At the bottom of the note bubble, it says "Monday, Oct 19, 3:38 PM • Note" with a small note icon.

Switching channels

By default, your reply will be sent on the same channel that the applicant used to contact you. For example, if the applicant has contacted you via Messenger, your reply will be sent by Messenger.

You can switch your conversation to any available channel by selecting it in the drop-down menu.

Returning a ticket to the queue or assigning it to another agent

While working on a ticket, you might decide that you can no longer handle the applicant's inquiry. This could happen because your shift has ended and you need a colleague to continue working on the issue, or because you don't have the required skills.

When this happens, you can choose to return the ticket to the queue by clicking **Return** in the top right-hand corner or to assign the ticket to another agent by clicking **Assigned: You** in the top left-hand corner, and selecting another agent.

Resolving a ticket

Once you've finished working on a ticket, click **Resolve** in the top right-hand corner of the ticket. This will move your ticket to the Resolved section of Inbox.

If you decide that a ticket needs to be reopened, or if you close it by mistake, simply click **Open** in the top right-hand corner of the ticket. This will reopen the ticket and allow you to start working on it again. If a ticket is reopened, this is recorded in the conversation history.

NOTE: As you can only have one ticket per contact open at any time, you may find that trying to re-open a ticket causes a modal window to appear. This happens when another agent has picked up the ticket and is working on it. In this case, the modal will direct you to view the open ticket.

Replying and closing a ticket (Detailed)

Click on your initials/photo and set your agent status as *available* or click on the **Go online** button in the queue section. If your agent status is *offline*, you won't be able to work on tickets, accept new ones or even see new tickets coming in.

Your new tickets will be under **Queue**. Place your cursor over the ticket and tap **Accept**. The tickets will automatically move to **Your Tickets**. Click on the ticket and write your reply—you can also attach media by clicking on the attachment icon.

WhatsApp

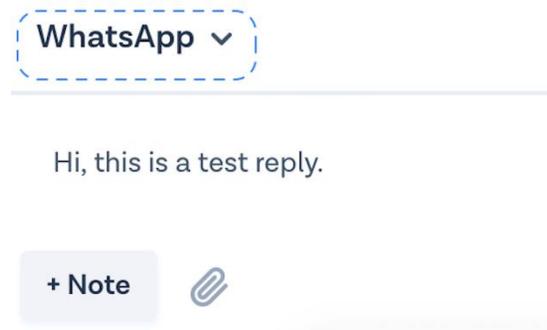
Hi, this is a test reply.

+ Note



Switching the channel: By default, the channel for your reply will be the same as the one the applicants used to contact you. For example, if the user contacted you via WhatsApp, that will be the default channel. However, you can easily switch it by clicking on the drop-down menu next to the default channel.

Keep in mind that that you're only able to switch to a channel on which the contact is available, that is, from which you have the respective identified. For example, the contact's phone number is the identifier for WhatsApp and SMS, so you can easily change between the two. However, for Facebook Messenger the identifier is the contact's Page ID, so you'll need it if you want to be able to switch to this channel.



Leaving a note: You can choose to leave an internal note for the ticket—only you and the other agents will be able to see it. Click on the **+ Note** button, write your internal note, e.g., “Don’t close this ticket until the applicant replies.” and tap **Save note** when you’re ready.

When your reply is ready, simply click on the **Send** button.

Do you want to close the ticket? Once you’re finished working on a ticket, click on **Resolve ticket** on the top-right of the conversation. And voilà! The ticket will be automatically moved to the resolved section.

Reviewing past tickets

If you want to review a ticket that was already resolved, click on the **Resolved** section. A list of all resolved tickets will be displayed, select the past ticket you’re looking to see an overview of it, including the full conversation, contact details, and platforms in use.

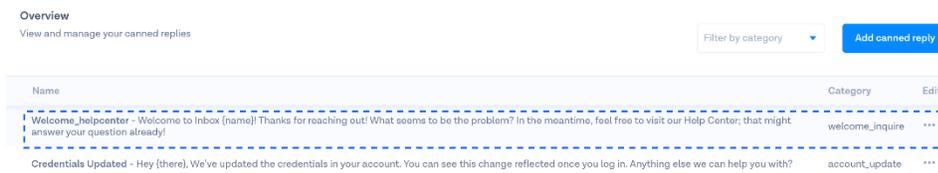
Canned Replies

In this guide, you’ll learn how to use and create **Canned Replies** with Inbox.

Canned Replies is an Inbox feature that allows you to set up automatic responses — which work as templates — for incoming messages. **Agents** will be able to pick the reply from a drop-down, saving them time in resolving tickets.

How to create Canned Replies?

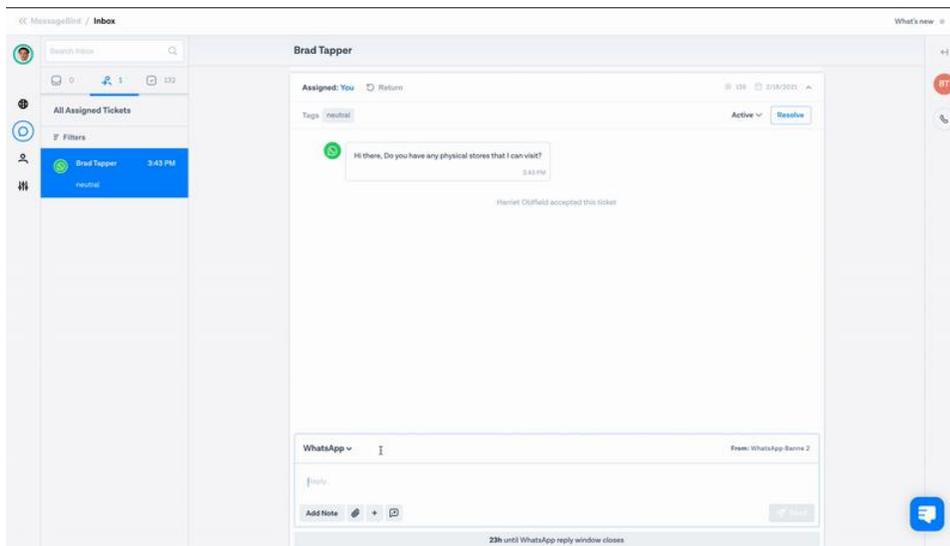
- Keep in mind that only managers can create Canned Replies. Ask MoneyPhone info@money-phone.com to add canned replies for you.
- Your new canned reply will be automatically added to your **Overview**.



- And that's it! Now you know how to create **Inbox Canned Replies**.

Using Canned Replies

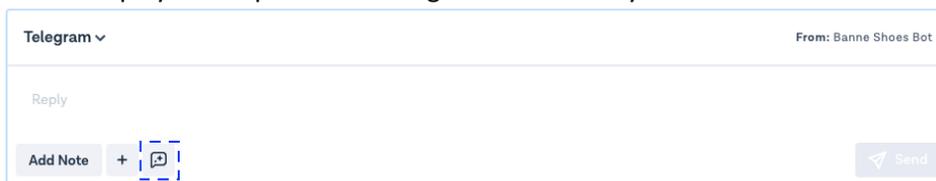
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Sending a canned message

Here's how to view and send Canned Replies when you're working on a ticket.

1. **Click** the Canned Replies icon, just to the right of the '+' symbol. The Canned Reply categories will be displayed in a panel on the right-hand side of your screen.



2. Click on the relevant Canned Reply category to expand it.

Alex Summers

Assigned: You Return 133 2/18/2021

Tags neutral Delivery Active Resolve

Hi there, can you please help me locate my order?
9:27 AM

Harriet Oldfield accepted this ticket

Telegram From: Banne Shoes Bot

Reply

Add Note + Send

Canned Replies Cmd + K

Search canned reply

General

Refunds

Shipping

3. Every Canned Reply in that category will be displayed. Click on the one that you want to use.

Canned Replies Cmd + K

Search canned reply

General

Welcome

Order Details

Refunds

Shipping

4. The Canned Reply will be automatically pasted into the conversation, ready for you to review before sending! If there is placeholder text in the template, such as {name}, make sure that you manually replace this with the information of the applicant that you are talking to.

Telegram From: Banne Shoes Bot

Hi there,
Your order number is:{order_number}.
Cheers

Add Note + Send

5. When you've reviewed your message and you're ready to send it to your applicant, **click** Send!
6. To close the Canned Replies panel, **click** on the canned replies icon again. The panel will also close automatically if you navigate to a different screen.

Keyboard shortcuts

To access the Canned Reply panel quickly, you can use the following keyboard shortcuts:

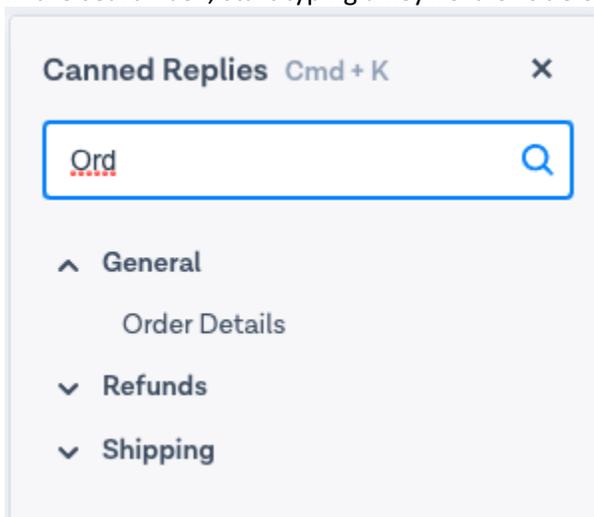
- On Apple computers, use **Cmd+K**
- On Windows systems, use **Ctrl+K**

From the search box, you can **click** the **Esc** key to close the Canned Replies panel.

The search function

If you have a lot of Canned Replies, use the search function to find the one that you need! Follow these steps to search Canned Replies when you're working on a ticket:

7. **Click** the Canned Replies icon. All of the canned reply categories will be displayed in the panel on the right-hand side of your screen.
8. In the search box, start typing a keyword or title of the Canned Reply that you're looking for.



9. As you type, the list of Canned Replies will automatically start to filter down results to match the keyword or title that you're searching for.
10. **Click** on the Canned Reply that you want to use, then follow from step 4 in the 'Sending a canned message' section.