Enterprise Chat and Email User Guide for Agents and Supervisors, Release 12.6(1)

For Unified Contact Center Enterprise and Packaged Contact Center Enterprise

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Preface

- About This Guide
- Change History
- Related Documents
- Communications, Services, and Additional Information
- Field Alerts and Field Notices
- Documentation Feedback
- Document Conventions

Welcome to the Enterprise Chat and Email (ECE) feature, which provides multichannel interaction software used by businesses all over the world as a core component to the Unified Contact Center Enterprise product line. ECE offers a unified suite of the industry's best applications for chat and email interaction management to enable a blended agent for handling of web chat, email and voice interactions.

About This Guide

Enterprise Chat and Email Agent's Guide introduces you to the Agent Console and helps you understand how to use it to handle customer queries and respond to them quickly and effectively.

Change History

This table lists changes made to this guide. The most recent changes are at the top:

Change	See	Date
Added a note on how to prevent termination of an agent's session on the Fireforx browser.	"To sign in to the Agent Console through Finesse:" on page 12	May, 2024
Updated details about signing in and signing out of the ECE gadget.	"Signing In and Out" on page 12	November, 2022
Update of Document Release 12.6(1) ES1		January, 2022
Removed references to user group from the Supervision Monitors chapter.	"Supervision Monitors" on page 109	
Update of Document Release 12.6(1) ES1		December, 2021
Details about Preferred Agent functionality added.	"Specifying Preferred Agent" on page 56	

Related Documents

The latest versions of all Cisco documentation can be found online at https://www.cisco.com

Subject	Link
Complete documentation for Enterprise Chat and Email, for both Cisco Unified Contact Center Enterprise (UCCE) and Cisco Packaged Contact Center Enterprise (PCCE)	https://www.cisco.com/c/en/us/support/customer-collaboration/cisco-enterprise-chat-email/tsd-products-support-series-home.html

Communications, Services, and Additional Information

- To receive timely, relevant information from Cisco, sign up at Cisco Profile Manager.
- To get the business impact you're looking for with the technologies that matter, visit Cisco Services.
- To submit a service request, visit Cisco Support.
- To discover and browse secure, validated enterprise-class apps, products, solutions and services, visit Cisco Marketplace.
- To obtain general networking, training, and certification titles, visit Cisco Press.
- To find warranty information for a specific product or product family, access Cisco Warranty Finder.

Cisco Bug Search Tool

Cisco Bug Search Tool (BST) is a web-based tool that acts as a gateway to the Cisco bug tracking system that maintains a comprehensive list of defects and vulnerabilities in Cisco products and software. BST provides you with detailed defect information about your products and software.

Field Alerts and Field Notices

Cisco products may be modified or key processes may be determined to be important. These are announced through use of the Cisco Field Alerts and Cisco Field Notices. You can register to receive Field Alerts and Field Notices through the Product Alert Tool on Cisco.com. This tool enables you to create a profile to receive announcements by selecting all products of interest.

Log into www.cisco.com and then access the tool at https://www.cisco.com/cisco/support/notifications.html

Documentation Feedback

To provide comments about this document, send an email message to the following address: contactcenterproducts_docfeedback@cisco.com

We appreciate your comments.

Document Conventions

This guide uses the following typographical conventions.

Convention	Indicates
Italic	Emphasis. Or the title of a published document.
Bold	Labels of items on the user interface, such as buttons, boxes, and lists. Or text that must be typed by the user.
`Monospace`	The name of a file or folder, a database table column or value, or a command.
Variable	User-specific text; varies from one user or installation to another.

Document conventions

1 Basics

- Terms and Concepts
- Signing In and Out
- Elements of the User Interface

Enterprise Chat and Email helps businesses set up multichannel customer engagement hubs to provide consistent high-quality service across all interaction channels such as email, chat, and phone.

The Agent Console is a service console and is designed specifically for use by customer service agents to handle service interactions. As an agent, this console is the only work area that you are likely to need; it provides you with all the tools and information that you need to complete activities. In this console, you can:

- Manage and respond to activities such as emails and chats
- View customer records and interaction history
- Manage cases

This chapter introduces the Agent Console and the basics of working in it. This includes:

- Logging in to the system
- Getting to know the user interface
- Setting some options as a first step towards working with activities
- Managing your availability to make sure that activities are routed to you in a way that maximizes your efficiency

Common aspects of working with activities are discussed in "Activities" on page 35. Details about working with specific types of activities, such as email and chat, are discussed in the chapter dedicated to that activity type. See "Emails" on page 58 and "Chats" on page 76.

Terms and Concepts

- **Activity**: A unit of work, an interaction between a customer and an agent, or an interaction between a supervisor and an agent.
- **Case**: Used to group activities related to the same issue. Activities are tied to a case using a single identification number, the Case ID. A case can contain activities of various channels such as email, chat, and phone.
- **Chat**: A real time interaction between an agent and a customer where the participants exchange text messages. As part of a chat, agents can also share web pages with customers.

  A chat activity is created for each chat session between a customer and an agent.
- **Customer:** A business object in the application that corresponds to a person who contacts the organization to purchase products and services, request support or information, or lodge complaints.

  In the Agent Console, there is a pre-defined Customer page that displays the customer's name, email address, phone number, etc.
- **Email**: An electronic communication. There are two types of emails in the application.
  - **Inbound emails:** Emails received by the company from customers.
  - **Outbound emails:** Emails sent by agents or the system on behalf of the company to customers.

  An email activity is created for each email that comes in to, or leaves, the system. Separate activities are also created for emails that go through supervisory loops that allow supervisors to review outbound email.

- **Notes**: Brief comments added to a business object. Notes are added to activities, cases, and customer profiles. They are meant for internal use and can be used to share tips and information with other agents or supervisors.

Signing In and Out

Before Signing In

Before signing in to the ECE Agent Console, you may need to configure your computer and browser settings.

- Make sure that JavaScript is enabled. Consult your administrator for further assistance.
- Make sure that your browser's pop-up blocker be disabled.
- Ensure that your browser is configured to allow all third-party cookies.
- Configure your browser to accept the Finesse server URL as a trusted URL. For more information about how to configure this, see *Cisco Finesse Desktop User Guide for Unified Contact Center Enterprise*.

Signing In

Once everything is properly configured, to sign in to the ECE Agent Console, you can sign in to Finesse and go to the ECE gadget in the Finesse toolbar to sign in and access it.

You can also access the agent gadget outside of Finesse, however, please be aware of the following:

- Agents can mark themselves available or unavailable in the gadget. For more information about availability, see "Managing Availability" on page 24.
- Notifications for email and chat should be enabled in the settings instead of using Finesse popover and toaster notifications. The **Alert Agent When Activity Is Assigned** setting in the Administration Console is enabled by default. For more information, see *Enterprise Chat and Email Administrator's Guide to Administration Console*.
- Finesse SSO configurations for agents are not supported outside of Finesse. Agents who are SSO-enabled cannot sign into the ECE Agent Console outside of Finesse.

To sign in to the Agent Console through Finesse:

Important: Signing into Finesse cannot make agents sign into the ECE gadget. Agents must follow the steps to sign into the ECE gadget. This is only applicable for installations that have upgraded to ECE 12.6(1) ES3 or newer versions.

1. Access the Finesse URL from a browser and sign in to Finesse: `http://`*Finesse_Server_Name*`/desktop`.
2. Click the **Manage Chat and Email** tab in the Finesse toolbar. If single sign-on is enabled, you are logged in automatically. If single sign-on is not enabled, enter your username and password in the appropriate fields. These fields are case sensitive. Once you have entered your credentials, click the **Sign In** button.

3. A message pop-up with the following message appears on the screen when you log into the ECE gadget: `You don't have access to top level storage. please click OK to request access and proceed`. Click the **OK** button.
4. A browser's pop-up appears on the screen to ask permission to allow or block the use of cookies. If you select **Allow**, the message pop-up that appears on the log in, do not show up again during future log in. If you select **Block**, the message pop-up appears every time when you log into the ECE gadget.

   It is suggested to select the **Allow** option in the browser's pop-up, as it makes the log in process smooth. If you have selected the **Block** option, the browser's pop-up might not appear again depending upon the browser you are using. If you want to allow the use of cookies, you have to delete the browser history, cache and cookies and site settings for the browser's pop-up to appear again, and then you can select the **Allow** option.

Note: To prevent the agent's session from terminating in the Mozilla Firefox browser whenever the agent refreshes the Finesse gadget, you must configure the **Enhanced Tracking Protection** setting under **Settings > Privacy & Security** and for the **Custom** option, select **Cross-site tracking cookies, and isolate other cross-site cookies** from the dropdown menu.

If Knowledge is enabled in your system, the Solve gadget in the Finesse toolbar might also be available for you to access upon signing in. This can also be accessed by clicking the **Solve** button in the Reply area while responding to emails or chats. For more information about Solve, contact your Cisco account manager.

To sign in to the Agent Console outside Finesse:

- Access the ECE URL from a browser and sign in: `https://`*ECE_Web_Server_Name*`/desktop`.

Signing Out

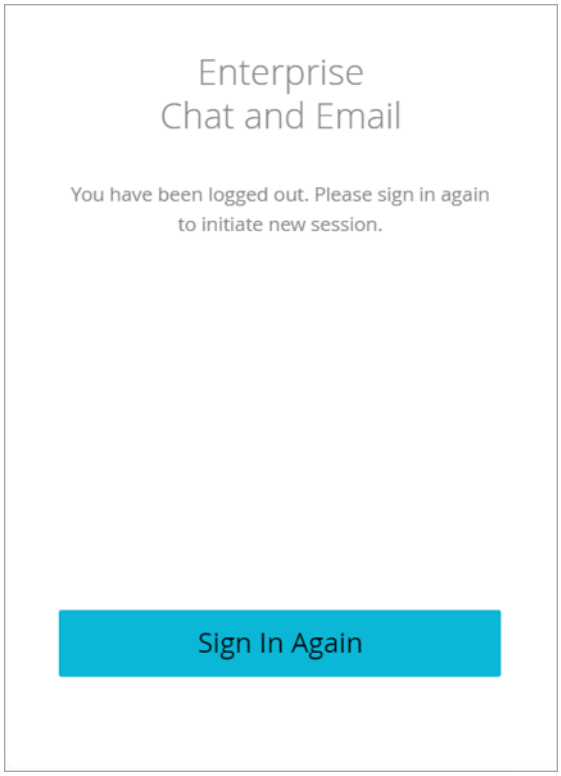
To sign out of the Agent Console:

- In the ECE Agent Console, click the **User Options** button and select the **Sign Out** option.

  After signing out, if the agent has not left the ECE gadget, a **Sign In Again** button is visible on the screen. You can click **Sign In Again** button to sign in back into the ECE Agent Console. If SSO is not enabled,

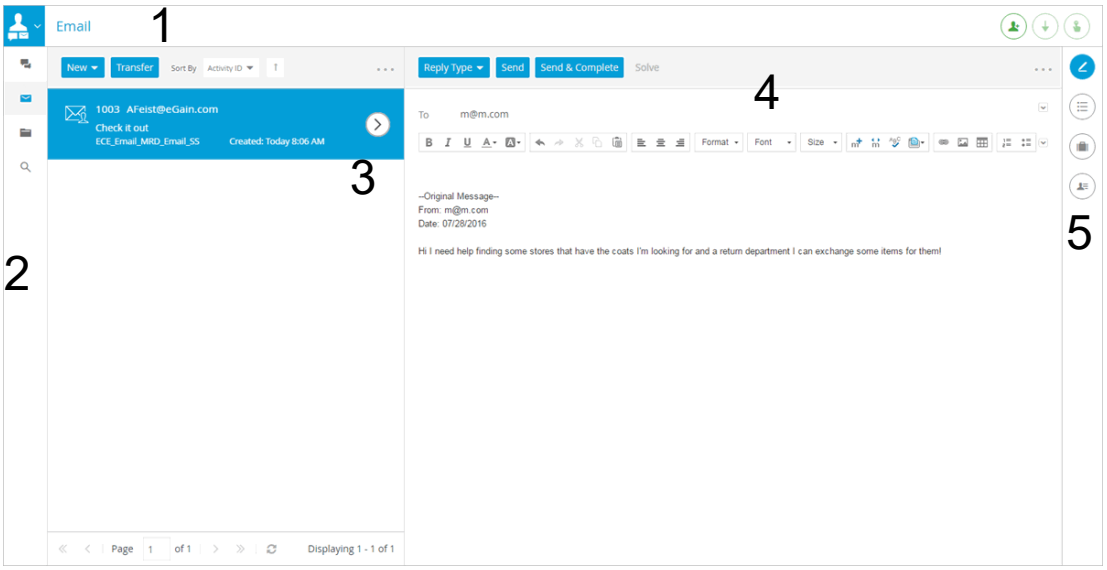
agents have to enter their credentials to sign in again whether they leave or remain in the ECE gadget after signing out.

Note: If an agent's session times-out, the agent has to sign into the ECE gadget again.



Elements of the User Interface

The Agent Console screen has five elements or functional areas.



The Agent Console

1. Console toolbar
2. Console sidebar
3. Inbox
4. Reply area
5. Information bar

Console Toolbar

The Console toolbar provides methods of getting work, adjusting personal settings, updating customer information, and logging out of the console. Agents can pick individual activities or pull activities from a queue or user with the corresponding buttons available. They can also create new customers in the system and provide the necessary details about customers between email and chat activities.

The different sections of the application that are accessed from the Console toolbar are explained here.

Use	To
User Options button	Expand the User Options menu. For more information about the tools in this menu, see the table below.
Pick button	Manually select the email activities to pull into your inbox list. You may be able to select activities from a specific queue or user, depending on the MRD to which you belong. For details, see "Picking and Pulling Emails" on page 59

Use	To
Pull button	Pull the next set of email activities into your inbox list. The activities that get pulled are determined by selections made in the **Pull Options** tab of the **Options** window. For details, see "Picking and Pulling Emails" on page 59
Create Customer button	Create a new customer and provide basic customer details to add to the system. For details, see "Creating Customers" on page 54.

When you click the User Options button in the Console toolbar, the following features and functions from User Options menu are displayed.

Use	To
Options	Open the Options window. In this window, you can configure various settings, set up your preferences for pulling activities, add words to you personal dictionary, and change your password.
My Monitors	Open the Monitors window. The monitoring feature, available to users with the appropriate permission, helps supervisors or managers to review the activity and workload of the team. For more information, see the "Activity Monitors" on page 103.
Blocked Visitors	The block visitor feature, helps the agent and supervisors to block chat customers if necessary. This option is only visible if the blocking of visitors setting is enabled by the administrator. For more information on blocked visitors, see *Enterprise Chat and Email Administrator's Guide to Administration Console*.
Change Console	To switch to the Administration console. Agents and Supervisors must have the Admin role to be able to see this option.
Toggle the sidebar	This option is used to expand the Console sidebar.
Layout Options	This option is used to modify the layout of the Agent Console by re-arranging the panes.
Sign Out	Log out of the application.

Console Sidebar

The console sidebar provides access to the Chat inbox, Email inbox, Search page, and Folders list. The inbox, Information bar, and Reply area have their own toolbars for tasks that you would perform in these areas.

The different sections of the application that are accessed from the console sidebar are explained here.

Use	To
	Open the Chat inbox. The inbox refreshes to show all chat activities currently assigned to the user. From here, the agent can select chat activities and begin working on them in the Reply area.
	Open the Mail inbox. The inbox refreshes to show all email activities currently assigned to the user. From here, the agent can select email activities and begin working on them in the Reply area.

Use	To
	Open the Folders list. Through the list Folders list, agents can look over various activities they sent or completed, as well as their open and close cases assigned to them.
	Open the My Activity Search page. You can create search folders for activities. For more information on creating search folders for activities, see "Saving Searches" on page 98
	Open the My Case Search page. You can create search folders for cases. For more information on creating search folders for cases, see "Saving Searches" on page 98
	Open the Search page. In the Search window, you can run searches to locate activities, cases, customers, etc.

Inbox

The inbox displays a list of email or chat activities depending on the selection made in the sidebar.

Buttons displayed in the inbox list change based on the selected activity type. For example, the buttons that are available for Chat activities are different from those available for Email activities.

Email Inbox

The inbox toolbar includes the following buttons.

Use	To
New button	Create a new outbound email activity. Activities can be created using the this button or using one of the following items or their shortcut keys: ▸ Outbound Email for Current Case (Shortcut key: F4) ▸ Outbound Email for New Case (Shortcut key: F3)
Sort By button	Select one of the numerous variables by which to sort the email activities in the inbox, such as Activity ID, Case ID, Priority, etc.
Transfer button	Transfer a selected activity. You may be able to transfer the activity to another queue or user, depending on the MRD to which you belong. For details, see "Transferring Emails" on page 73.
More Options button	Perform other functions like: ▸ **Refresh**: Refresh the inbox. ▸ **Pin/Unpin**: Pin or unpin activities. ▸ **Notes**: Open the Notes window to manage internal notes that are attached to activities, cases and customers. ▸ **Layout:** Change the layout of the inbox to **Responsive, Card,** and **Table.** For more details, see "Changing the Inbox Layout" on page 34

Chat Inbox

The inbox toolbar includes the following buttons.

Use	To
Transfer button	Transfer a selected activity. You may be able to transfer the activity to another queue or user, depending on the MRD to which you belong. For details, see "Transferring Chats" on page 88.
Notes button	Only visible in Chat Inbox Open the Notes window to manage internal notes that are attached to activities, cases and customers.

Reply Area

The Agent Console has a comprehensive set of tools to help you easily respond to customer queries. This area changes based on the type of activity on which you are working.

The Reply area includes the following toolbar buttons.

Use	For these Activity Types	To
Reply Type button	Email	Select the type of reply to be sent. Reply types are **Reply**, **Reply to all**, **Forward**, and **Redirect**.
Send and Complete button	Email	Send the reply and complete the activity.
Send button	Email	Send the reply.
Complete button	Chat	Complete the Chat activity
Link Customer button	Chat	Links chat activity of an anonymous customer to a customer already in the system. This button is only available if the customer accessed a chat entry point that allows for visitors to create chat activities anonymously.
Solve button	All	This button is currently disabled.
More Options button	All	Perform less frequently performed functions like: ▸ **Notes**: Add a note to an activity, case or customer. (Email only) ▸ **Complete:** Complete the activity. (Email only) ▸ **Save:** Save a draft of the email. (Email only) ▸ **Attachment:** Attach a file to the reply. (Email only) ▸ **Transfer:** Transfer an activity to another queue or user, based on permissions. (Chat only) ▸ **Page Push:** Share a web page with customers. This button is enabled only when a Chat activity is selected. (Chat only)

Text Editor Toolbar

The text editor toolbar contains the various buttons agents can use to further enhance their responses to customer inquiries. The following buttons are located directly above the text area in the Reply area. The buttons that are available differ based on what type of activity the agent is answering.

Use	For these Activity Types	To
Spell Check button	All	Run the spelling checker. If block check is configured, then your message is checked for any blocked words, any of which found in your message prompts you to delete them before sending the message to the customer.
Headers button	Email	Inserts a pre-written header into the text area.
Greetings button	Email	Inserts a pre-written greeting into the text area.
Signatures button	Email	Insert a pre-written signature into the text area.
Footers button	Email	Insert a pre-written footer into the text area.
Undo button	Email	Undo the previous action.
Redo button	Email	Redo the previous action.
Cut button	All	Cut the selection from the text area.
Copy button	All	Copy the selection from the text area.
Paste button	All	Paste the selection into the text area.
Insert Macro button	All	Insert a macro into the text area.
Expand Macro button	Al	Expand the macros currently in the text area.
Paragraph Styles button	Email	Change the paragraph styles of your text (Header, Normal, Address, etc)
Font button	Email	Change the font of the selected text.
Size button	Email	Change the size of the selected text.
Bold button	All	Embolden the select text.
Italics button	All	Add emphasis to the selected text.
Underline button	All	Underline the selected text.
Font Color button	Email	Change the font color of the selected text.
Highlight button	Email	Change the color around the selected text.
Align Left button	Email	Align the selected paragraph to the left.
Center button	Email	Align the selected paragraph to the center.
Align Right button	Email	Align the selected paragraph to the right.
Numbering button	Email	Add a numbered list to the text area.
Bullets button	Email	Add a bulleted list to the text area.
Decrease Indent button	Email	Decrease the indent of the selected text.

Use	For these Activity Types	To
Increase Indent button	Email	Increase the indent of the selected text.
Insert Hyperlink (or Link) button	All	Insert a URL link into the text area.
Insert Table button	Email	Insert a table into the text area. You may choose the number of rows & columns, as well as the width and layout of the table.
Insert Picture button	Email	Insert an image into the text area.
Quick Responses button	Chat	If your administrator has configured quick responses for the common messages used in chat, then you can use them. From the list of quick responses, select the one you want to use. The text of the quick response appears in the Text box.
Text Color button	Chat	Same function as the Font Color button: Change the font color of the selected text.
Smiley button	Chat	Insert a smiley into your message to add flair and personality to your response.

Information Bar

The Information bar provides details about the activity selected in the inbox. From this bar, you can view and edit details about customers, audit activities, view customer and case history, and so on.

The Information bar consists of the following buttons.

Use	To
Reply button	View the Reply area to work on your response for the selected chat or email activity.
Case button	Get information about the case to which the selected activity belongs.
Activity button	View the content of the selected activity. Attachments and headers are also displayed. Also view the field properties of the activity such as the activity ID, the case ID, the priority of the activity, and the date by which the activity should be completed. Generate an audit report to know about the actions performed on the selected activity. Associate classifications such as categories and resolution codes with the selected activity
Customer button	Get details about the customer associated with the selected activity. Get information about all the activities and cases associated with the customer.
Links button	Access external applications and databases. Information gathered from these resources can be added to activity replies.

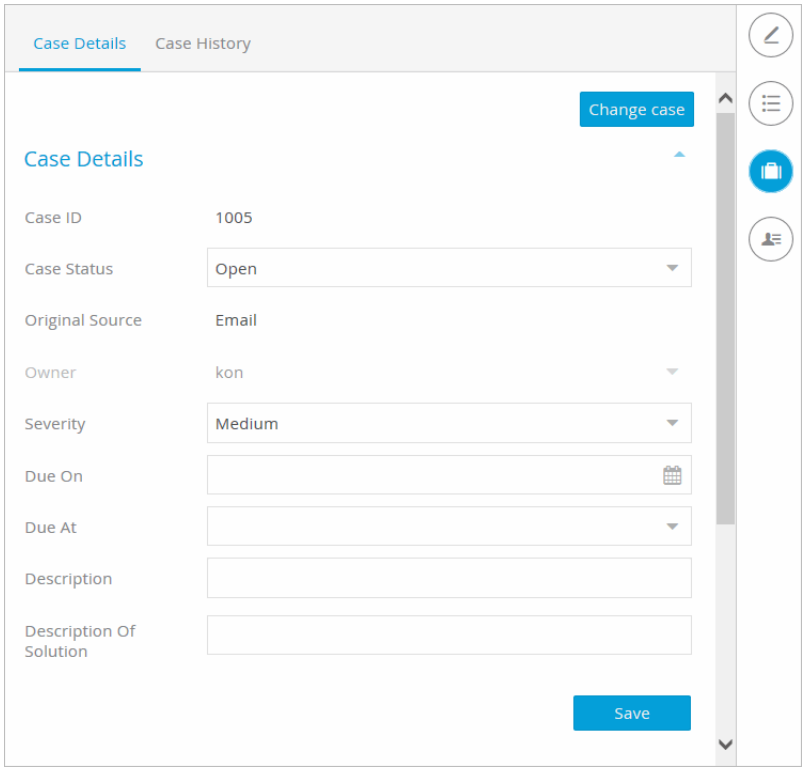
From the tools in the Information bar, you can view details of the following business objects:

- Activity: body, details, classifications, notes, and audit information
- Case: details, related cases, classifications, notes

- Customer: details and history

You can also do the following:

- Change priority of activities
- Change severity of cases
- Change due date of activities and cases
- Create new cases and change cases of activities
- Close cases
- Access external applications and databases
- Change contact details of customer
- Change the customer associated with an activity
- Delete customers
- Change customer details



Use the Information bar to view information about the items in your inbox

2 Getting Started

- Getting Work
- Doing My Work
- Finding Information
- Personalizing the System

This chapter provides an overview of working in the Agent Console, and outlines the various settings and options that can be configured to improve your productivity.

Getting Work

As an agent, there are different ways in which work may be assigned to you. This section outlines the various ways in which the work you need to perform is routed to you in the form of activities. Depending on the type of activities you handle, you may experience one or more of the routing methods outlined here.

When a new activity is assigned to you, a message is shown to notify you that a new activity is assigned to you.

Routing

Routing Emails

Emails are retrieved from the mail server and placed into the database. Workflows act on them, creating an activity for each email, and applying the business rules configured by a system administrator. Workflows can then route the email activity directly to a queue.

While in a queue, emails can then be automatically assigned to available agents. They can also be picked or pulled manually by agents. For more information, see "Picking and Pulling Emails" on page 59.

Routing Chats

Chats are initiated from entry points and are routed directly to the queue associated with that entry point. From queues, activities are routed to agents marked as available.

Setting Pull Options

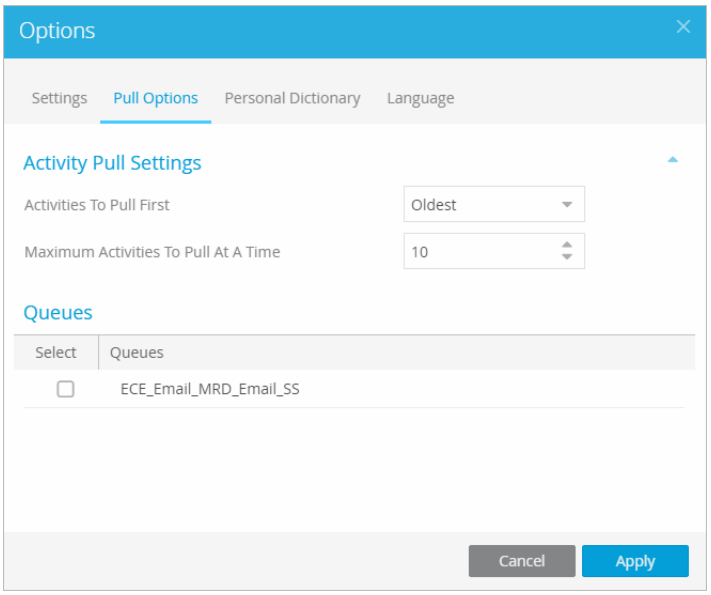
You can specify the queues from which you want to pull activities, which activities to pull, and how many activities to pull at a time. Agents are able to see and select any queues that were imported from the same MRD to which their skill group belongs. Pull options are set from the Options window which is launched using the **Option** button in the console sidebar.

Important: You can change your options for pulling activities only if your administrator has configured you to do so.

To set your pull options:

1. In the Console toolbar, click the **User Options** button.
2. Click the **Options** button.
3. In the Options window, go to the Pull Options tab and provide the following details.

- **Activity to pull first:** From the dropdown list select the type of activities to pull. The options available are:
  - **Due soonest:** Activities that are not late, but are due the soonest.
  - **Highest priority:** Activities that are marked with the highest priority.
  - **Most overdue:** Activities that are late and are already overdue.
  - **Newest:** Activities that have the most recent creation date and time.
  - **Oldest:** Activities that have the oldest creation date and time.
- **Maximum activities to pull:** Specify the number of activities you want to pull each time you click the **Pull** button. This value cannot be above the agent's concurrent task limit.
- From the list of queues, select the queues from which you want activities to be pulled when you click the **Pull** button in the inbox toolbar.



Set options for pulling activities

4. Click the **OK** button.

Managing Availability

In the ECE Agent Console, there are two activity types you are expected to service.

- Mail
- Chat

In the Finesse desktop, you can make yourself available for Email and Chat independently. You may still pick, pull, and be transferred email activities while marked unavailable for emails; for more information, see "Picking and Pulling Emails" on page 59. However, chats are automatically assigned to you by the system. The system cannot assign chat activities to you, if you are not marked available. To receive chat activities from your chat queue, you must make yourself available.

Important: You must make yourself available for chat every time you log in to the Agent Console before you can begin receiving incoming chat activities.

If you do not want new chats assigned to you, such as when you are at the end of your shift, you must make yourself unavailable before completing the last chat activity assigned to you. This ensures that new chat assignments waiting in the queue are not assigned to you. Depending on how your system is configured, you may be required to provide a "Not Ready" reason code as to why you are no longer available. The reason codes available are configured by your administrator and may include the following:

- Break
- Lunch
- Training / Coaching
- One on One
- Meeting / Huddle
- Personal
- Reading
- End of Shift

While you are marked available for activities, notifications appear whenever a new activity is assigned to you. The ECE gadget does not need to be the active application for this to occur. You can be in another Finesse gadget or working outside of Finesse entirely. Selecting the notification brings you directly to the incoming activity in your ECE inbox.

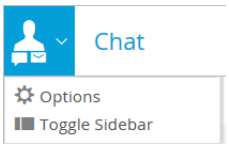
To change your availability status:

1. In the Finesse desktop toolbar, click the availability dropdown.

Click the Chat and Email availability dropdown

2. In the menu that appears, select one of the following options:
   - **All:** Select **Ready** to mark yourself available for Chat and Mail channels. Select **Not Ready** to mark yourself unavailable for Chat and Mail channels.
   - **Chat:** Select **Ready** to mark yourself available for Chat. Select one of the Not Ready reason codes specific to the Chat channel to mark yourself unavailable.
   - **Email:** Select **Ready** to mark yourself available for Mail. Select one of the Not Ready reason codes specific to the Mail channel to mark yourself unavailable.

Your availability status for the channels is shown by the color of the icons in the Finesse toolbar and in the User menu icon in the ECE Agent Console toolbar.



Your availability is shown in the console toolbar

Doing My Work

Cases and Activities

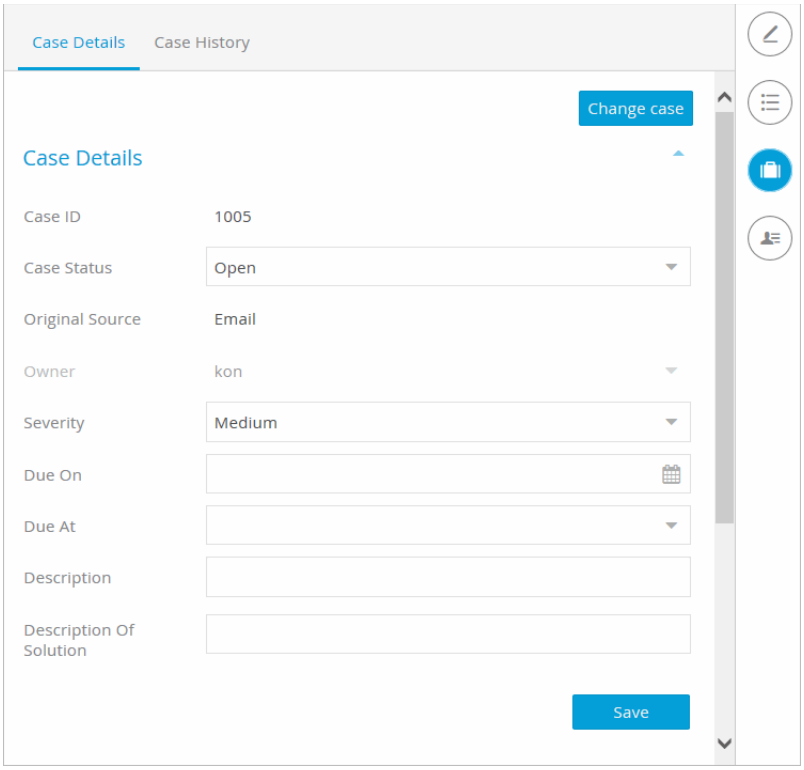
A majority of the work you do in the Agent Console involves working with activities and cases.

- Cases are discussed in the chapter "Cases" on page 44.
- Common aspects of working with activities are discussed in "Activities" on page 35.
- Details about working with specific types of activities such as email and chat are discussed in the chapter dedicated to that activity type. See "Emails" on page 58 and "Chats" on page 76.

Resources

The application provides easy access to several resources that help you to quickly respond to emails, complete chats, and work on other types of activities. The Agent Console is designed so that most of these resources are

available from the buttons in the Information bar, allowing you to easily access these resources while working in the Reply area.



Information bar with Case selected

Finding Information

The easiest way to locate objects like activities, cases, and customers is to search for them. Objects that are listed in the Inbox can be located quickly using the **Search** feature in the console sidebar.

You can locate completed activities, as well as open and closed cases assigned to you by clicking viewing the Folder feature in the console sidebar. This is a quick and easy method of reviewing your work, or seeing what else needs to be done to close a case.

Personalizing the System

About Options and Settings

Most settings are configured by administrators for the business partition or for each department. The administrator may allow users to configure certain settings as individual options. In the Options window, you can modify settings and create personal dictionary attributes.

Important: Changes made to options take effect on the next login. If you want the changed options to take effect immediately, you must log out of the system and log in again.

Configuring Settings

If you have been assigned the required permissions, you can change the following settings for your inbox.

Activity

1. **Chat - Inbox Sort Column:** Use this setting to define the field (column name) by which the list in the Chat Inbox should be sorted. The options available are – Key (default value) which refers to the shortcut key, Activity ID, Case ID, When Created, Customer name, Subject, Activity sub status, and Queue name.

Important: If you specify a column name that is not part of your inbox list, or if there is a tie between two activities with the same value for the sorting column, the inbox is then sorted by the shortcut key.

2. **Chat - Inbox Sort Order:** Use this setting to define the sort order of the list in the Chat Inbox. The options available are – Ascending and Descending (default value). This setting does not affect the sorting in My Searches and My Monitor folders.
3. **Inbox Sort Column:** Use this setting to define the field (column name) by which the list in the Activities and Cases folders should be sorted by default. The options available are – Activity ID (default value), Activity Priority, Case ID, Contact point, Department name, Subject, When created, Activity type, and Activity sub status. This setting does not affect the sorting in the My Searches folder.
4. **Inbox Sort Order:** Use this setting to define the sort order of the list in the Activities and Cases folders in your inbox. The options available are – Ascending and Descending (default value). This setting does not affect the sorting in the My Searches folder.
5. **Number Of Activities Per Page:** The number of activities that can be displayed in the inbox at a time is based on a pagination model. Each page displays a certain number of records. With this setting, you can decide the number of activities to be displayed on one page. The default number of activities displayed on a page is 4. Note that two other settings, the Inbox sort column and Inbox sort order also influence the activities that are displayed on a page.

Activity Pushback

1. **Activity Type For Autopushback:** You can define which activities should be pushed back from your inbox when you log out.The options available are:
   - **None**: No activities are pushed back to queues.
   - **New activities only**: Only activities with the sub-status **New** are pushed back to queues (default value).
   - **Both new and incomplete activities**: All activities in the inbox are pushed back to queues.

2. **Autopushback Time (Minutes After Logout):** You can define a time period after which activities should be pushed back from your inbox to queues. This time period begins when you log out of the system. Activities will remain in your inbox for this period of time after you log out of the system. The value for this setting is in minutes. The default value is 30.

Common

1. **Date Format:** Use this setting to set how the date is presented within the console.
2. **Date and Time Format:** Use this setting to set how the date and time are presented within the console.
3. **Enable Keyboard Shortcuts For Agent Console:** Use this setting to enable keyboard shortcuts for the console.
4. **Send Agent An Email When Activity Is Assigned:** Use this setting to define when email notifications of new activities should be sent to you. The options available are:
   - **Always:** Email notifications are sent every time a new activity is assigned, irrespective of whether you are logged in to the application or not.
   - **Never:** No email notification about new activities are sent (default value).
   - **When Logged In:** Email notifications are sent to your email address when you are logged into the application.
   - **When Not Logged In:** Email notifications are sent to your email address when you are not logged into the application.

General

1. **Chat - Enable Sound Alert**: Use this setting to define if you want the system to play a sound when a chat is assigned, and every time a chat message is received. To minimize distraction, the alert sounds only when the focus is not in the chat inbox.
2. **Email - Enable Sound Alert**: Use this setting to define if you want the system to play a sound when an email is assigned to you. To minimize distraction, the alert sounds only when the focus is not in the main inbox.

Monitoring

- **Refresh Interval (Seconds):** The monitor windows have to be refreshed periodically to update them with real time data from the monitor tables. Use this setting to define how often the monitoring windows should be refreshed automatically. This setting takes values in seconds. The default value is 30.

Spell Checker

1. **Auto Blockcheck:** With this setting you can choose to let the spelling checker automatically check for blocked words. Blocked words are configured in the Administrator Console in the Dictionaries node. They can also be defined in the Personal Dictionary options of a user. If this setting is enabled, emails that contain blocked words are not sent until the blocked words have been deleted or modified. Since the Auto blockcheck works through the Auto spell check setting, enabling the Auto block check means that the spelling checker is automatically invoked before an email is sent out.

2. **Auto Spellcheck:** Enable this setting to automatically invoke the spelling checker before an email is sent out of the application.
3. **Chat - Auto Blockcheck**: With this setting you can choose to let the spelling checker automatically check for blocked words. Blocked words are configured in the Administrator Console in the Dictionaries node. If this setting is enabled, chat messages that contain blocked words are not sent until the blocked words have been deleted or modified. Since the Auto blockcheck works through the Auto spell check setting, enabling the Auto block check means that the spelling checker is automatically invoked before a chat message is sent.
4. **Chat - Auto Spellcheck**: Enable this setting to automatically invoke the spelling checker before a chat message is sent to the customer. This setting is not used for emails.
5. **Ignore Web Addresses And File Names:** This setting helps you to enable the spelling checker to ignore internet addresses and file names. The options available are:
   - Yes: The words are ignored.
   - No: The words are not ignored and are displayed in the spelling checker for correction (default value).
6. **Ignore Words That Contain Numbers:** This setting allows you to let the spelling checker ignore words with numbers. The options available are:
   - Yes: The words are ignored.
   - No: The words are not ignored and are displayed in the spelling checker with options for correction (default value).
7. **Ignore Words With Only Upper Case Letters:** With this setting, you can choose to let the spelling checker ignore words in all uppercase letters. The options available are:
   - Yes: The words are ignored.
   - No: The words are not ignored and are displayed in the spelling checker with options for correction (default value).
8. **Ignore Words With Only Numbers Or Special Characters**: This setting allows you to let the spelling checker ignore words that have mixed digits. For instance, name123@yahoo.com. The options available are:
   - Yes: The words are ignored.
   - No: The words are not ignored and are displayed in the spelling checker with options for correction (default value).
9. **Ignore Words With A Mixture Of Upper And Lower Case Letters:** With this setting, you can choose to let the spelling checker ignore words with unusual mixture of upper and lower case letters. For instance, myFirstWord. The options available are:
   - Yes: The words are ignored.
   - No: The words are not ignored and are displayed in the spelling checker with options for correction (default value).
10. **Include Original Message Text During Spell Check**: Use this setting to decide if the content of the original email message should be checked when the spelling checker is run.

11. **Preferred Dictionary Of The User:** Use this setting to choose the dictionary used by the spelling checker. The options available are - English (US) Dictionary, English (UK) Dictionary, German Dictionary, Spanish Dictionary, French Dictionary, Portuguese Dictionary, Brazilian Portuguese Dictionary, Dutch Dictionary, Italian Dictionary, Norwegian (Bokmaal) Dictionary, Finnish Dictionary, Swedish Dictionary, Danish Dictionary.

Important: The application does not have dictionaries for the following languages: Chinese (Simplified), Chinese (Traditional), Czech, Greek, Japanese, Korean, Norwegian (Nynorsk), Portuguese (Brazilian), and Turkish.

12. **Split Contracted Words:** The spelling checker considers correct contracted words as misspelled while using the French and Italian dictionaries. Configure the value of this setting to **Yes** to ensure that contracted words in these languages are not misidentified by the spelling checker. This setting affects only French and Italian. Options available are: **Yes** and **No**.

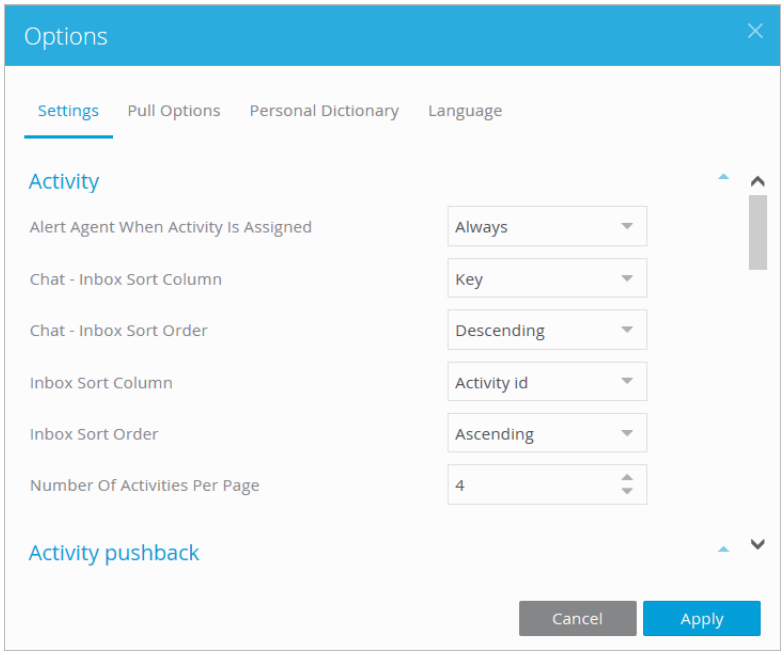
User

- **Include Message Header In Reply:** An email contains header information that details the sender's email address, subject of the email, time at which the email was sent, machine name, protocol type, client name etc. Use this setting to define the type of header information that should be included in the reply. The options available are:
  - **None**: No header information is displayed in the Reply area and hence included in the reply.
  - **Basic**: Only basic header information is displayed in the Reply area and hence included in the reply. (default value).
  - **Complete**: The complete header information is displayed in the Reply area.

To change settings:

1. In the Console toolbar, click the **User Options** button.
2. Click the **Options** button.

3. In the Options window, go to the Settings tab, and change the desired settings.



Configure settings

4. After making your changes, click the **Apply** button.

Updating the Personal Dictionary

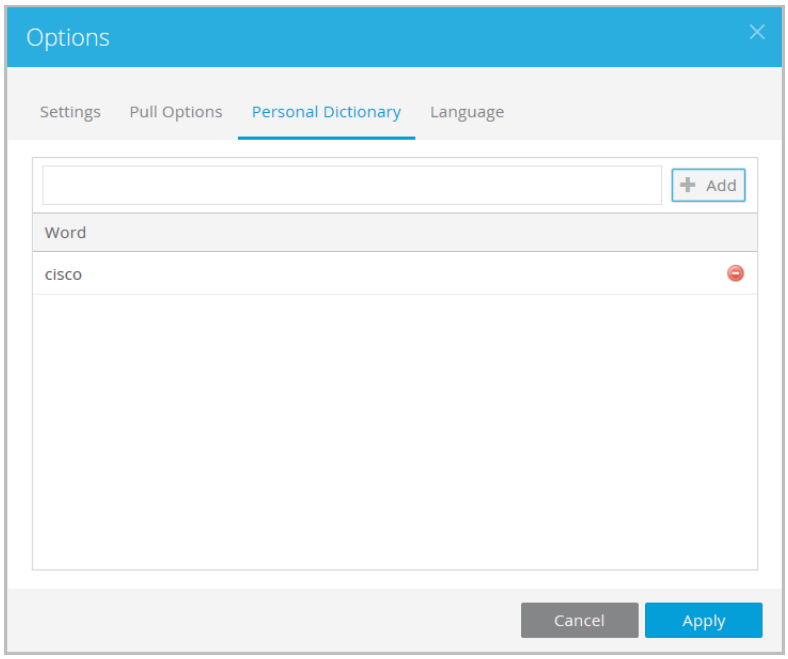
To prevent the spelling checker from highlighting words that are specific to your organization, but not part of a standard dictionary, you can update the personal dictionary.

Adding Words to Personal Dictionary

To add words to your personal dictionary:

1. In the Console toolbar, click the **User Options** button.
2. Click the **Options** button.
3. In the Options window, click the Personal Dictionary tab.

4. On the Personal Dictionary tab, click in the field below the Word column heading, type the word you want to add to your personal dictionary and press ENTER or click the **Add** button.



Add words to the personal dictionary

5. When you have added all the desired words, click the **Apply** button.

Deleting Words From Personal Dictionary

To delete words from your personal dictionary:

1. In the Console toolbar, click the **User Options** button.
2. Click the **Options** button.
3. In the Options window, on the Personal Dictionary tab, select the word you want to delete and click the **Delete** button.

Setting the KB Language

In deployments configured for more than one language, you can set the KB language for a session.

To set the language:

1. In the Console toolbar, click the **User Options** button.
2. Click the **Options** button.
3. In the Options window, go to the Language tab.
4. Select the language.

5. Click **Apply**. The language is set for the user session, that is, until you log out of the system.

Changing the Console Layout

Users can re-arrange the layout of the Agent Console as per their requirements. When changing the Layout Options, users can choose from the following preset layouts: **Default, One Pane, Two Pane,** and **Three Pane**.

To change the layout options:

1. In the Console toolbar, click the **User Options** button.
2. Go to the **Layout Options**.
3. From the dropdown, select one of the options:
   - **Default:** This is the default console layout with all three panes visible.
   - **One Pane:** Select this option to get a dedicated view of the Inbox.

     The Inbox changes to Table view when this option is selected. You can click on any activity you want to work on from the table. The layout then changes again with a dedicated Reply Area and a minimized Inbox on the left and Information Bar on the right.
   - **Two Pane:** Select this option to get a dedicated view of the Inbox and the Reply Area. The Activity Area gets collapsed, and only the Information Bar is present.
   - **Three Pane:** Select this option to change the layout to show all three panes- Inbox, Reply Area, and Information Bar.

Changing the Inbox Layout

Users can change the view of the Inbox by changing its layout. When changing the Inbox's layout, users can choose from the following options: **Responsive, Card,** and **Table**.

To change the layout of the inbox:

1. In the Inbox, click the **More Options** button.
2. Go to the **Layout** option.
3. From the dropdown, select one of the options:
   - **Responsive:** Select this option to make the Inbox responsive upon expansion or contraction of the Inbox pane. By default, the view is set to Card, but if you expand the Inbox pane to 1450px, it gets changed to the Table view.
   - **Card:** Select this option to get a card view of the Inbox.
   - **Table:** Select this option to get a table view of the Inbox.

3 Activities

- About Activities
- Viewing Conversation History
- Viewing Activity Information
- Modifying Activity Details
- Changing the Case of an Activity
- Adding Notes to Activities
- Adding Classifications to Activities

About Activities

An activity is a unit of work. It may be an interaction between a customer and an agent, or, in the case of a supervisory loop, an interaction between a supervisor and an agent. Interactions can be through email and chat channels. Activities related to the same issue are grouped into a case. A case can contain activities of more than one type.

The state of an activity is either **In Progress** or **Completed**. As long as the issue is unresolved, the activity remains in the **In Progress** state. When the issue is resolved, the activity state is updated to **Completed**.

Types of Activities

- **Email**: Email activities are created for each electronic mail communication from or to a customer. For more information on working with email activities, refer to "Emails" on page 58.
- **Chat**: A chat activity is created for each real time interaction with a customer using the chat channel. For more information on working with chat activities, refer to "Chats" on page 76.
- **Callback**: A callback activity is created each time a chat interaction is initiated from a callback entry point, and the system successfully places a call to the customer.
- **Delayed callback**: A delayed callback activity is created each time a chat interaction is initiated from a delayed callback entry point, and the system successfully places a call to the customer.

  For more information on chat, callback, and delayed callback, refer to "Chats" on page 76.

Working with Activities

All activities, irrespective of type, have certain common elements, and common methods of working with these elements. Such information is presented in this chapter. Functionality that is specific to a particular type of activity is discussed in the chapter dedicated to that activity type. Information about replying to emails is presented in the Emails chapter and information about working on chats is in the Chats chapter.

The majority of your work with activities that is not related to replying to emails or chats is performed in the Console toolbar, Console sidebar, and Information bar.

- View activity details including the body of the activity. See "Viewing Activity Details and Body" on page 37.
- Change the priority of an activity. See "Changing Priority of Activities" on page 39.
- Set the due date of an activity. See "Changing Due Date of Activities" on page 40.

Viewing Conversation History

Agents can view the entire conversation history of a customer using Conversation View. It allows an agent to see all the conversations that have happened in past with a customer through **email and chat**.

The activities displayed in the Conversation View also contain any information previously sent to the customer, such as attachments and for chat activities it also shows the actions undertaken by the agent involved in that conversation (escalations, transfers, etc). This helps in faster resolution of issues and improves efficiency.

For the chat activities, an agent can simply scroll up in the chat pane to see previous conversation. For Main Inbox activities, an agent needs to click on the **Show Conversation** button to see the conversation history.

Note: Note that agents are able to see all previous conversation history by default. However, the Administrator can disable this feature from the Enable conversation stream setting in the department's Settings.

To view conversation history of chat activities:

1. In the Console sidebar, click the **Chat inbox** button.
2. Select an activity from your Chat inbox.
3. In the Chat pane, scroll up to see previous conversations.

To view conversation history of other activities:

1. In Console sidebar, click the **Email inbox** button.
2. In the Email Inbox, select the activity by clicking on it.

- In the Reply area toolbar, click the **Show Conversation** button.

3. The Reply area refreshes to **Conversation View**. All the previous conversations are displayed here.
4. In the Conversation view, you can scroll up to see activities from the past that belongs to the same customer.

   To view the information for conversation history for email activities, you need to click the **View More** button at the top right corner of the email activity card. The email content and attachments are available in a new window. You can print this information by clicking the **Print** button.

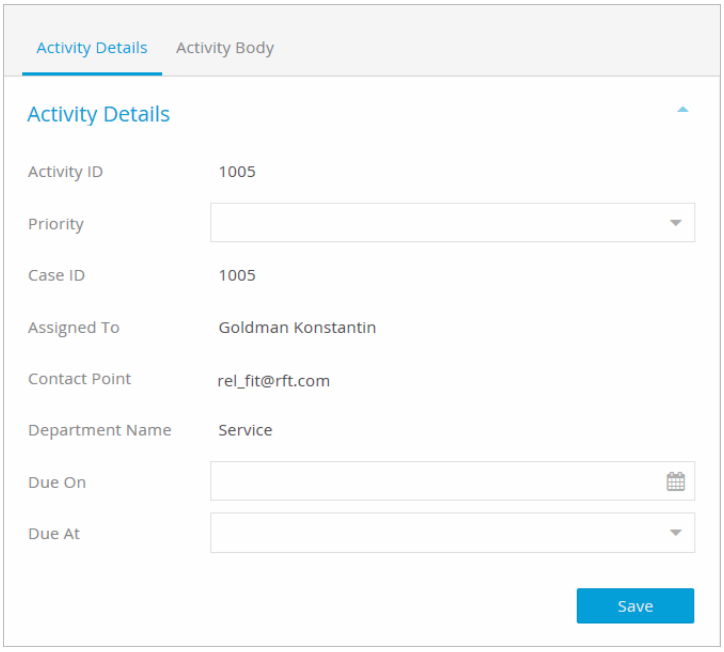
Viewing Activity Information

Viewing Activity Details and Body

To view the activity details and body:

- In the Information bar, click the **Activity** button. The Activity section appears. Here you can view the details of the activity, including:
  - **Activity ID:** The activity ID of the chat selected in the inbox.
  - **Case ID:** The case ID of the case associated with the activity. If there is no case associated with an activity, then this field is blank.
  - **Priority**: The priority of the activity. By default there is no priority set for the activity.
  - **Customer Name:** The name of the customer associated with the chat activity.
  - **Assigned To:** The name of the agent to whom the activity is assigned.

- **Contact Point:** The contact point associated with the activity.
- **Department Name:** The name of the department to which the activity belongs.
- **Queue Name:** The name of the queue from which the chat came to the agent.
- **Created On:** The date and time when the chat was created.
- **Substatus:** The current status of the chat activity, such as In Progress, Abandoned, etc.
- **Due On (email only):** The due date for completion of the activity.
- **Due At (email only):** The time of the due date at which the activity is due. Select from the 30-minute intervals in dropdown menu or type in the specific time at which the activity is due. The due date must be established in order to set a due time.



View activity details and body

Depending on how your system is configured, some custom attributes configured by your administrator may also be present in the activity details for you to view and edit.

- In the Activity Body section, you can view and print the content of the activity. If the selected activity is a chat activity, you can scroll through the chat transcript. The chat transcript is not available for viewing in the Activity Body section until the activity has been completed.

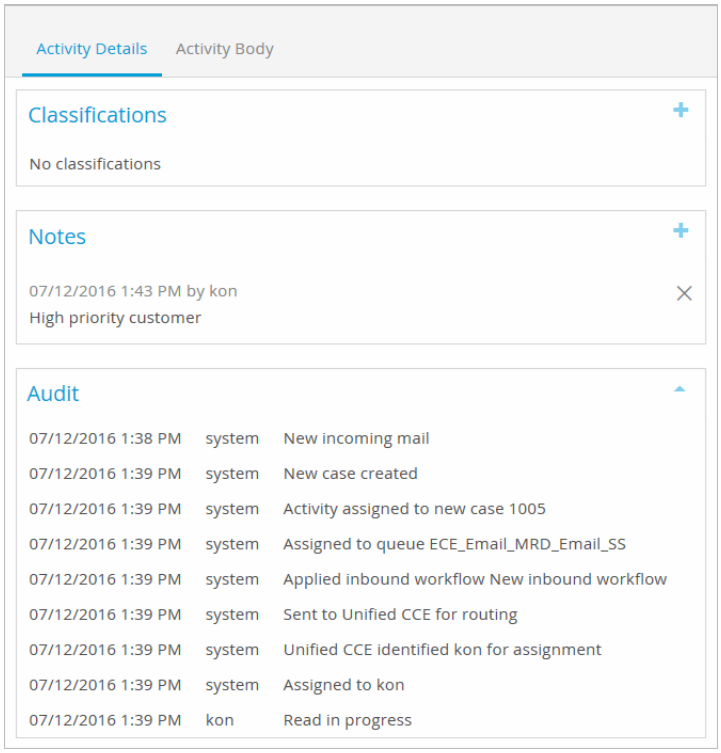
  To print the body of the activity, click the **Print** button and use the browser's print options.

Viewing Audit Information

The audit of an activity shows every single action that has occurred on an activity. It gives complete information from the moment the activity was created to where the activity is at present. Supervisory activities are also included in the audit information.

To view the audit information:

- In the Activity Details page, go to the Audit section and expand the area. Here you can view the audit information.



View audit details

Modifying Activity Details

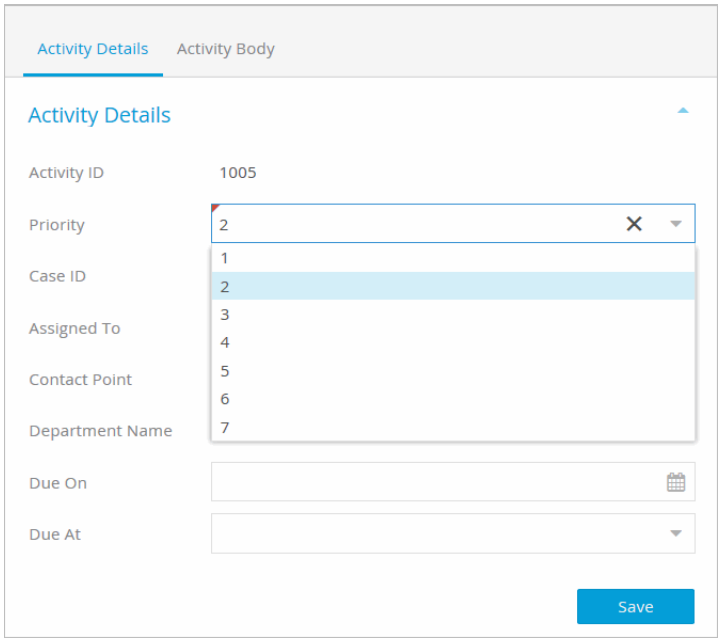
Changing Priority of Activities

For activities, you can set a priority from 1 to 7, where 1 is the highest priority and 7 is the lowest priority.

To change the priority:

1. In the Information bar, click the **Activity** button.

2. In the Priority field of the Activity Details page, select the priority of the activity from the dropdown list.



Set a priority of the activity

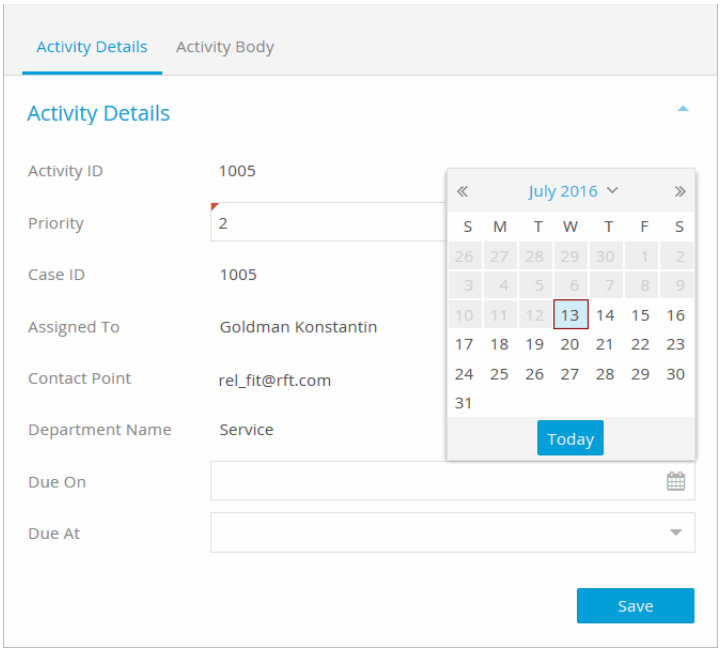
3. Click the **Save** button.

Changing Due Date of Activities

To change the due date:

1. In the Information bar, click the **Activity** button.

2. In the Activity page, in the **Due on** field, click the dropdown button. From the calendar select a date. You can also type the date in the field, in the format dd/mm/yyyy.



Set a due date for the activity

3. In the **Due at** field, specify the time when the activity is due.
4. Click the **Save** button.

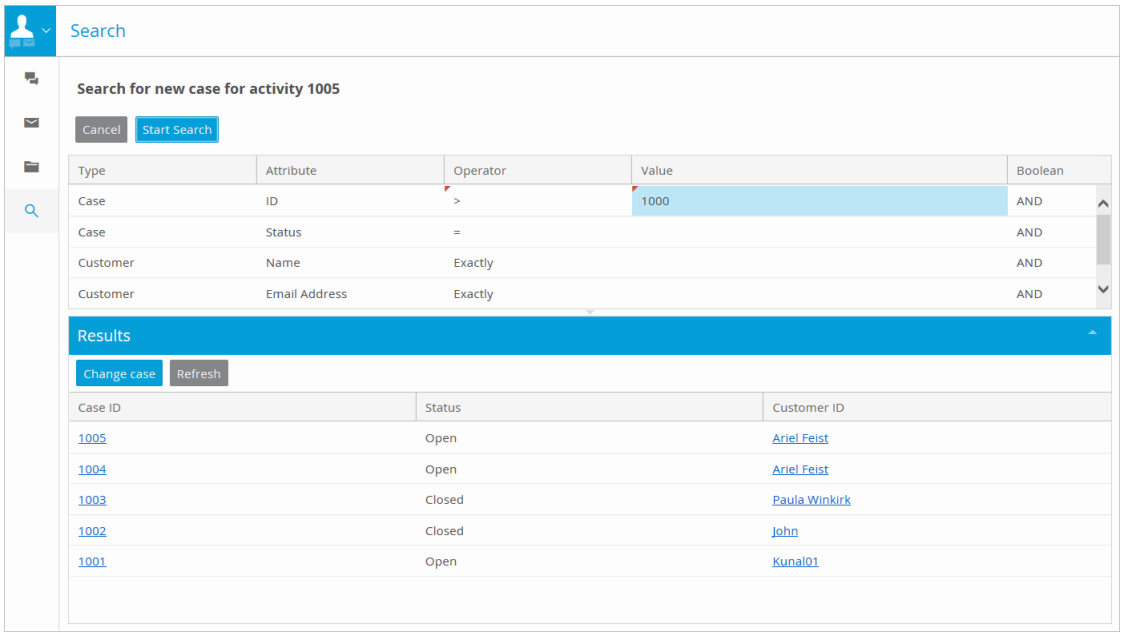
Changing the Case of an Activity

The system allows you to manually change the case associated with an activity to another existing case. If your administrator has enabled it in the inbound workflows, all new cases assigned to the activity become associated with each other and can be found in the Related Cases tab of the Case section in the Information bar.

To change the case:

1. In the inbox, select the activity for which you want to change the case.
2. In the Information bar, click the **Case** button.
3. On the Case Details page, click the **Change case** button.

4. On the Search page, search for the case with which you wish to associate the activity.



Change the case of the activity

5. From the Results area, select the case.
6. Click the **Change Case** button.

Adding Notes to Activities

Notes are a collaborative tool for agents and supervisors. Meant for internal use, notes are used to share tips and information with other agents or supervisors. Notes added to the activity stay with it if the activity is transferred to another user or queue. Other users can then view these previous notes, as well as add their own.

To add a note to an activity:

1. In the inbox, select the activity to which you want to add a note.
2. In the Information bar, click the **Activity** button.
3. In the Notes section, click the **Add** button.
4. Enter your note in the text area.
5. When your note is complete, click the **Add Notes** button.
6. Click the **Delete** button next to the note to remove it from the activity.

Important: You can also add and remove notes to email activities via the More Options menu.

Adding Classifications to Activities

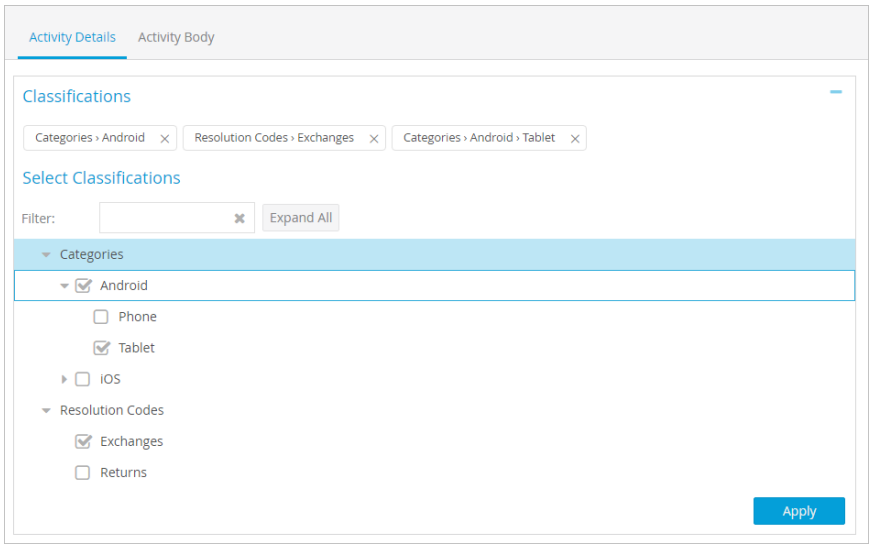
Classifications are an arrangement of resources to identify activities and their solutions. As you work on an activity, you can view, add, and remove classifications to help supervisors and administrators track activities through the system. Classifications are of two types:

- Categories
- Resolution codes

Depending on how your administrator has configured the system, activities may be automatically assigned categories and resolution codes before the activities are assigned to you.

To add classifications to an activity:

1. In the Information bar, click the **Activity** button.
2. In the Activity Details page, expand the Classifications section by clicking the **Add** button.



Locate and add classifications

3. In the Select Classification section, expand the categories or resolution codes lists and choose the desired classifications. You can filter the classifications with the search bar, or click the **Expand All** button to quickly locate the classifications.
4. With the classification selected, click the **Apply** button. All the selected classifications appear as tags at the top of the section. If you need to remove a classification, click the Delete icon in the tag.

4 Cases

- About Cases
- Viewing Case Information
- Changing Due Date of Cases
- Changing Solution Description of Cases
- Changing Severity
- Closing Cases
- More About Cases and Activities

About Cases

A case is used to group activities related to the same issue. Activities are tied to a case using a single identification number, the Case ID. A single case can contain activities of email and chats.

A case is in one of two states: open or closed. If the case contains any open activities, then the status of the case remains open. When all the activities held within a case are completed, the case is closed. Open cases, closed cases, and recent cases (cases that were closed within the past 14 days) can be viewed under the Folders list by clicking the **Folders** button in the Console sidebar.

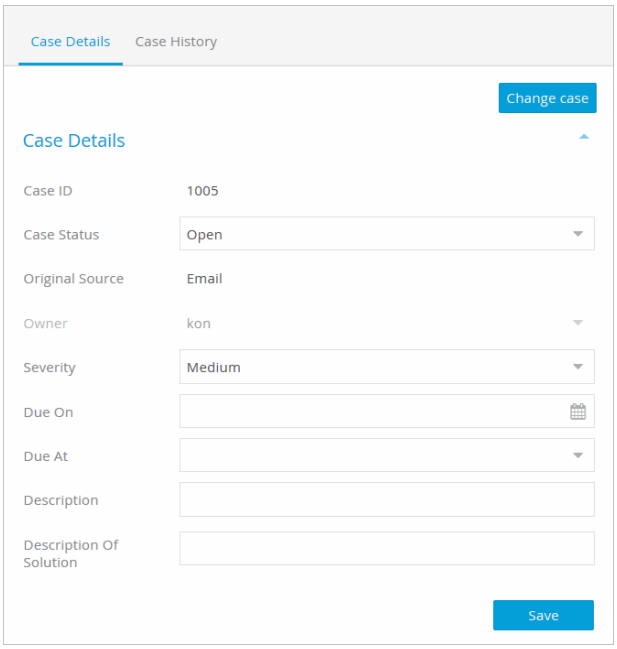
A closed case is reopened when a new activity is associated with it. For example, if an agent creates a new activity using a closed case number, the system automatically reopens the case. It can also be reopened using the workflow. A case can be configured to reopen automatically when a customer sends an email with the closed case number in the subject line of the email. You cannot reopen cases manually.

For each Callback and Delayed Callback activity, the application creates a new activity and a new case for that activity. This case is closed automatically when the application gets a message from Unified CCE that the outgoing call was placed successfully.

Viewing Case Information

To view case information:

1. In the Information bar, click the **Case** button.
2. In the Case details page, view the properties of the case, the due dates, and related cases, if there are any.



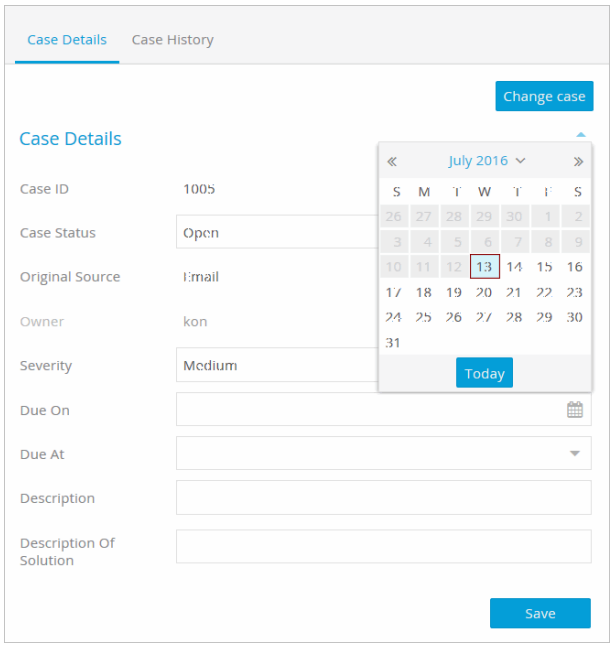
View case details

Changing Due Date of Cases

To change the due date:

1. In the Information bar, click the **Case** button.
2. In the Case Details page, in the **Due on** field, click the dropdown button.

   From the calendar select a date. You can also type the date in the field, in the format dd/mm/yyyy.



Set due date for a case

3. In the **Due at** field, specify the time when the case is due.
4. Click the **Save** button.

Changing Solution Description of Cases

To change the solution description:

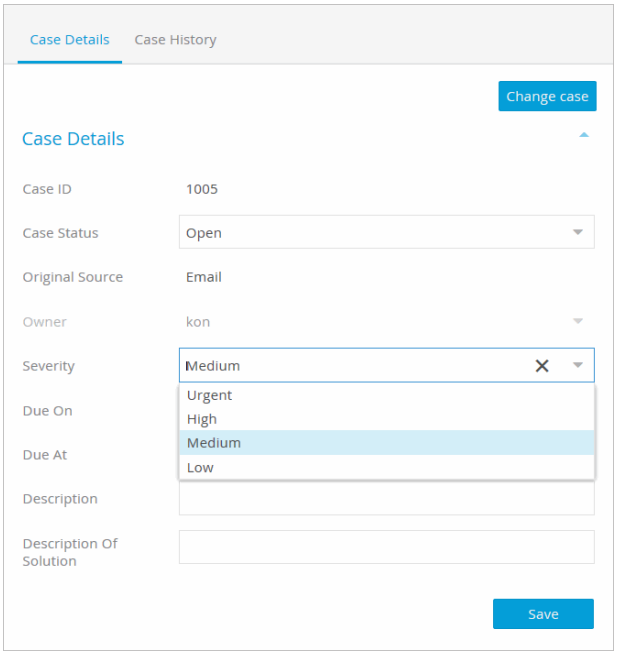
1. In the Information bar, click the **Case** button.
2. In the Case Details page, in the **Description of solution** field, provide a brief description of the solution.
3. Click the **Save** button.

Changing Severity

To change the severity of a case:

1. In the Information bar, click the **Case** button.
2. In the Case section, in the **Severity** field, select the severity of the case.

   You can set the severity level as low, medium, high, or urgent.



Change severity of a case

3. Click the **Save** button.

Closing Cases

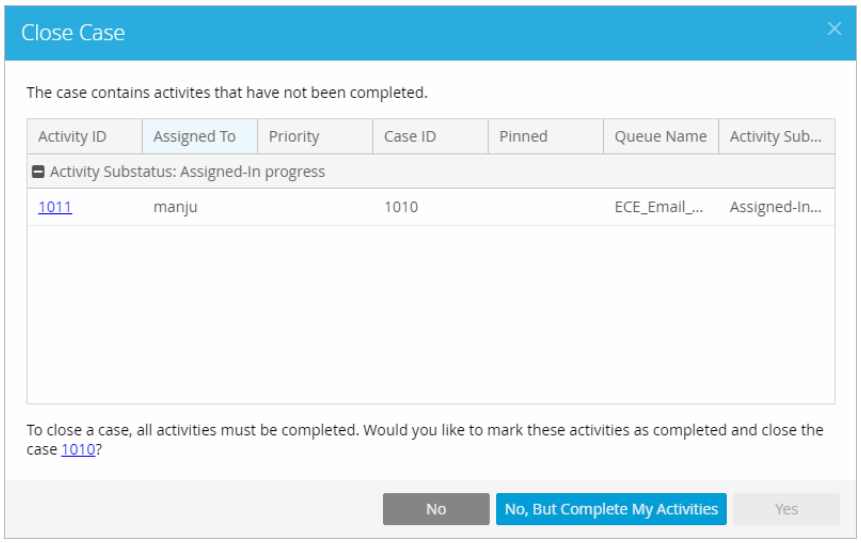
You cannot close a case if the only open activities for the case are outbound activities.

To close a case:

1. In the Information bar, click the **Case** button.
2. On the Case Details page, in the **Case status** field select **Closed**.
3. Click the **Save** button.

   If the case has any activities that are not completed, a Close Case window appears.

4. In the Close Case window click the **Yes** button to complete all activities assigned to you, and close the case. If there are any activities of the same case assigned to other agents, and you wish to complete all of the activities assigned to you, click the **No, But Complete My Activities** button. The Close Case prompt appears only if the open activities belong to the same MRD to which the agent belongs.



*Click **Yes** to complete the activities and close the case*

More About Cases and Activities

In addition to the tasks listed in this chapter, you can also change the case associated with an activity. For more information, refer to "Changing the Case of an Activity" on page 41.

5 Customers

- About Customers
- Viewing Customer Information
- Changing Customer Details
- Changing Contact Details of Customers
- Creating Customers
- Adding Notes to Customers
- Changing Customers
- Deleting Customers
- Specifying Preferred Agent

About Customers

In the Agent Console, customers are the individuals who contact an organization. These individuals can be defined by agents in the Agent Console through the Create Customer button, or automatically by the system through inbound email and chat information. Each customer is listed as an individual, but may actually be a designated contact person for a company.

Viewing Customer Information

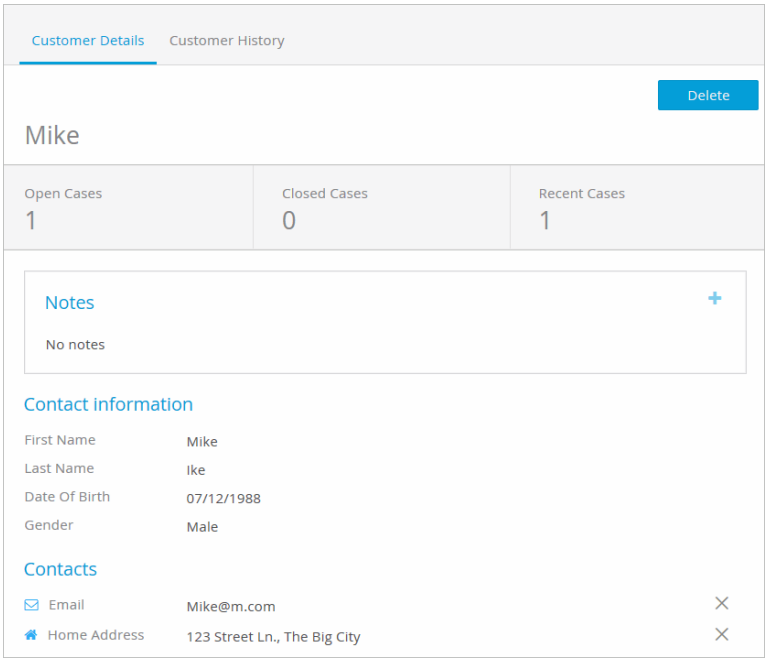
The Agent Console allows you to view detailed information on each customer. Information that may be populated for the customer include, but is not limited to, their age, gender, date of birth, occupation, and any relevant contact points such as phone numbers and emails.

There are multiple methods of viewing customer information. You can look directly at customer details via search, or you can look at the customer information as it relates to an activity you are currently working on. The steps below discuss how to view customer information while working on activities. For more information on accessing customer details through searches, see "Conducting Searches" on page 95.

To view the customer details:

1. Select an activity that is attached to the customer you wish to view. The activity can be an open chat or email activity you're currently working on, or a completed activity you're editing via the Folders list or search option. For more information about activities, see the following:
   - For accessing activities through searches, see "Conducting Searches" on page 95.
   - For accessing completed activities, see "Activities" on page 35.
   - For working on email activities, see "Emails" on page 58.
   - For working on chat activities, see "Chats" on page 76.
2. With an activity selected, click the **Customer** button.

3. In the Customer Details section, you can view the customer details such as name, contact details, notes, and the number of cases they have had. From here you can further review the customer information and history, as well as edit their contact information.



View the customer details

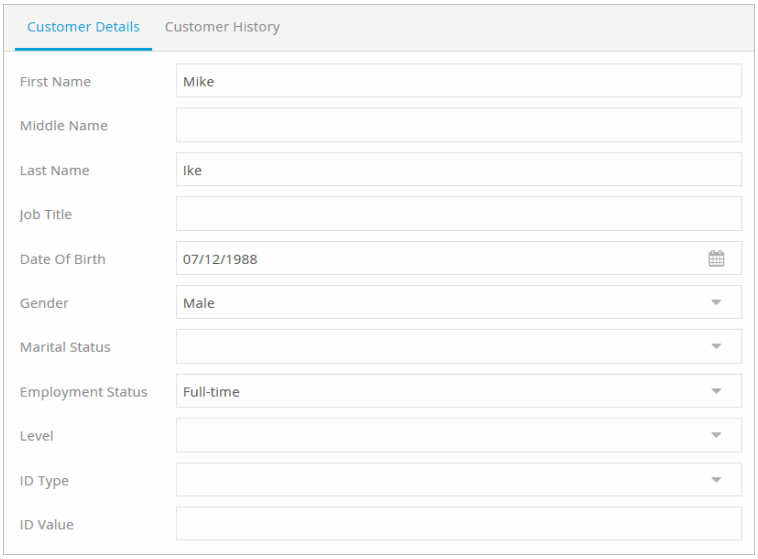
Changing Customer Details

Details of a customer can be changed in the Agent Console at any time. Reasons to do so may include changes in the customer's home address or phone number, or updates to their occupational or marital status.

To change the customer details:

1. With an activity selected, click the **Customer** button.

2. In the Customer Details section, click the **Edit Details** button.



Update customer details

3. Update the customer's information.
4. Click the **Save** button.

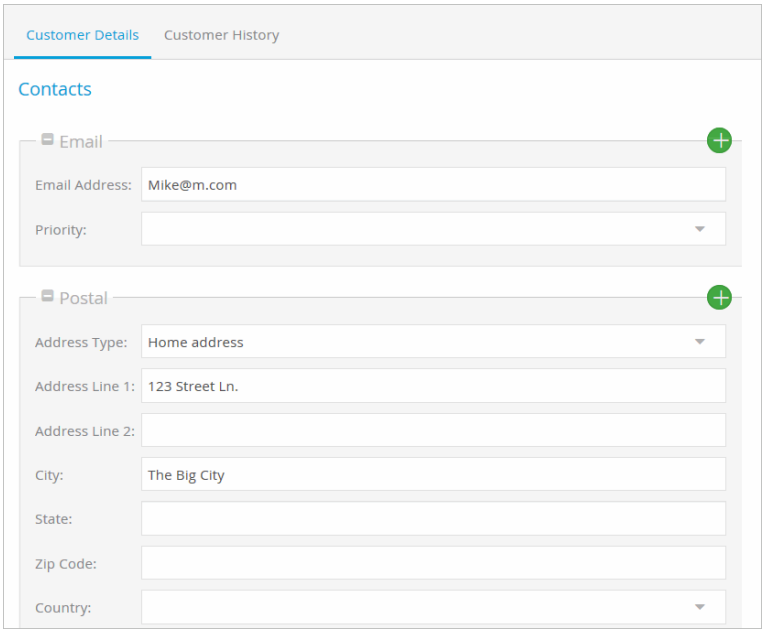
Changing Contact Details of Customers

A customer's contact details may change over time. The Agent Console allows you to update each customer's contact details to reflect changes in their preferred method of contact.

To change the contact details of a customer:

1. With an activity selected, click the **Customer** button.

2. In the Customer Details page, click the **Edit Details** button.



View contact details of a customer

3. Scroll to the Contacts section of the Customer Details page. Locate the desired contact information and make your changes.

   Note: changing an email address in the contact information only modifies the customer details. The **To** address associated with an activity is not updated. To change the **To** address, see "Email Address and Subject" on page 61.

4. Click the **Save** button.

To create a new contact point:

1. In the Customer Details page, click the **Edit Details** button.
2. Scroll to the desired type of contact, such as telephone, and click the **New Contact Point** button. This generates a contact point of that type.

   Each new section is added to the bottom of the page. If you need to collapse the fields to make the page easier to view, click the **Collapse** button.

3. Provide the new contact details of the customer.
4. Click the **Save** button.

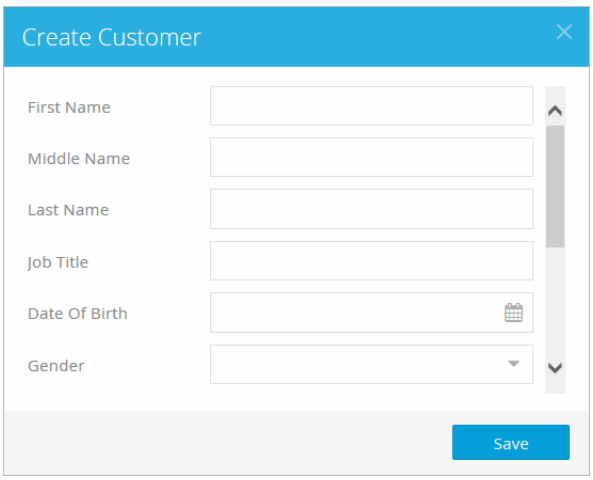
To delete a contact point:

1. If a contact point you have added is incorrect, you can immediately edit the information, or while on the Customer Details page, click the **Delete** button to remove it.
2. In the window that appears, click **Yes**.

Creating Customers

To create a customer:

1. In the Console toolbar, go to the **Create Customer** icon.
2. In the Create Customer dialog window, enter the customer's information.
3. Click the **Save** button.



Create new customer

4. The new customer profile is automatically displayed in the Console. Click the **Edit Details** button to continue adding information.
5. Provide the details of the customer, including contact information.
6. Click the **Save** button.

Adding Notes to Customers

Notes are a collaborative tool for agents and supervisors. Meant for internal use, notes are used to share tips and information with other agents or supervisors. Other users can then view these previous notes, as well as add their own.

To add a note to a customer:

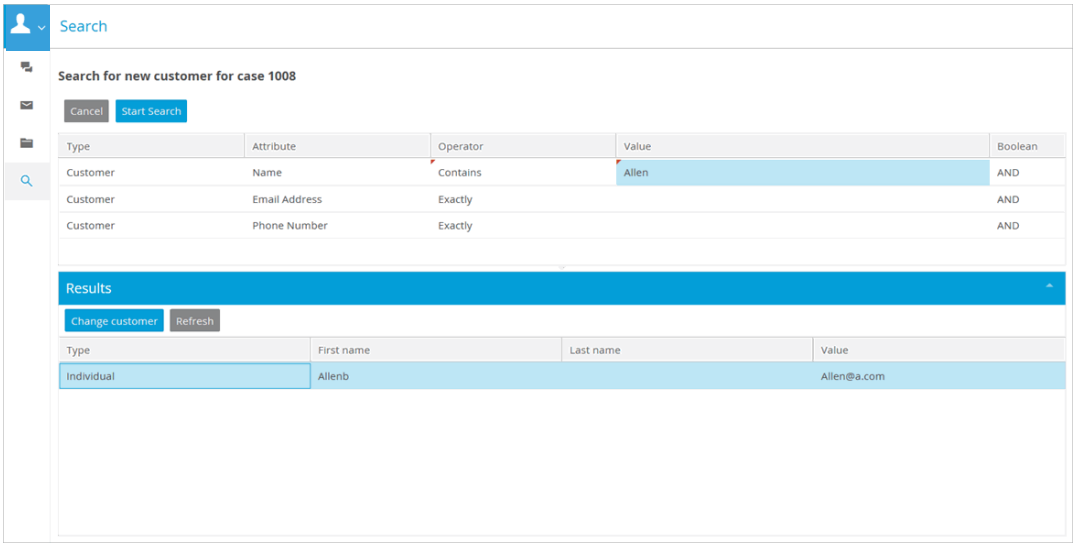
1. In the Notes section of the Customer Details page, click the **Add** button.
2. Enter your note in the text area.
3. When your note is complete, click the **Add Notes** button.
4. Click the **Delete** button next to the note to remove it from the activity.

Important: You can add notes to customers while working on an associated activity or via customer search.

Changing Customers

To change the customer associated with an activity:

1. Navigate to the activity to which you wish to reassign the customer.
2. In the Information Bar, click the **Customer** button.
3. In the Customer Details page, click **Change**. This button is disabled for closed cases and completed activities.
4. In the search for new customer page, conduct a search for the customer you want to associate with the activity. For details about search, see "Conducting Searches" on page 95.



Select the new customer for the activity

5. In the Results section, select the customer and click the **Change Customer** button.
6. A window appears asking you to select a new contact point for the activity. Choose the desired contact point and click **Change Contact Point**.

   When a customer contact point is changed, the original contact point still appears in the inbox. Contact points for activities appear in the inbox with an asterisk (*) next to it to indicate that the contact point has been changed. This ensures activities can be found at both the original contact point and the new contact points. This prevents activities associated with either the new or old contact points from becoming lost.

Deleting Customers

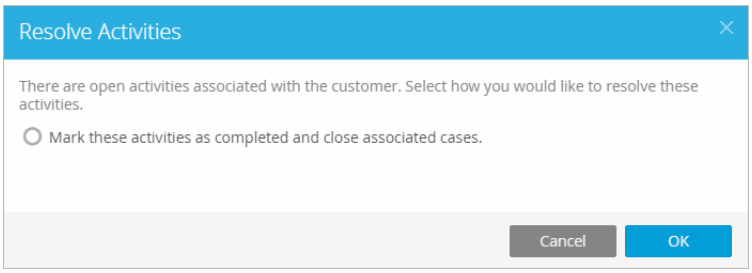
If extraneous customers have been created in the system at some point, you can tidy up the system by deleting the extra customers. However, note that customers can only be deleted if the activities they're associated with have been closed or they are not associated with any activities. You cannot delete customers attached to an open chat activity.

To delete a customer:

1. Locate the customer you wish to delete.
2. In the Customer Details page, click the **Delete** button.

> **Important: A customer associated with an open chat activity cannot be deleted.**

3. A message appears asking you to confirm the deletion. This message varies based on if the customer is attached to an activity, the type of activity, if the activity is open or closed.
   - If you are deleting a customer who is not attached to an activity, click the **Yes** button.
   - If you are deleting a customer from a closed activity, click the **Yes** button.
   - If you are deleting a customer from an open email activity, click the **Yes** button and then select **Mark these activities as completed and close the associated cases.** This completes the activity, closes its case, and deletes the customer associated with it.



Select an option before deleting the customer

4. Click **OK**.

Specifying Preferred Agent

The system lets you set any agent preferences that customers may have. If a customer profile has a preferred agent associated with it, the system can be configured in such a way that activities can be always routed to that agent or be routed based on agent's availability and log in status.

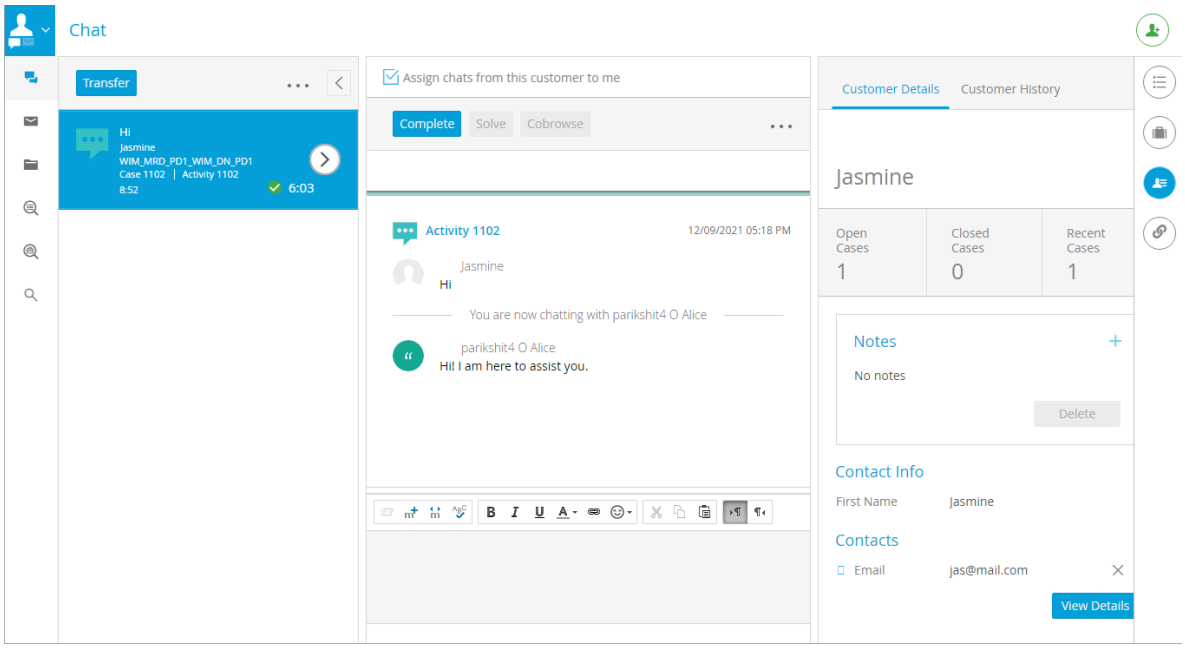
Preferred Agent for Chat and Conversation Hub

For Chat and Conversation Hub activities, by default the last agent is set as the preferred agent. But these settings can be changed and agents can set themselves as the preferred agent. They can also remove themselves as the preferred agent if needed.

To specify the customer's preferred agent for chat and conversation hub:

1. In the Chat inbox, select any activity.

2. In the Reply pane, select the **Assign chats from this customer to me** option to set yourself as the preferred agent. You can uncheck the option if you do not need to be the preferred agent.



Select preferred agent for the customer

Important: For chat and conversation hub activities, the ability for an agent to reset the preferred agent option depends on the configuration done in the Administration Console.

6 Emails

- Picking and Pulling Emails
- Viewing Emails
- Multitasking with Phone Activities
- Reply Types
- Email Address and Subject
- Composing Replies
- Email Reply Tools
- Pinning Email Activities
- Saving Drafts
- Sending Replies
- Composing an Outbound Email
- Resubmitting an Activity
- Completing Email Activities
- Transferring Emails

Picking and Pulling Emails

There are different ways in which you can actively assign to your inbox:

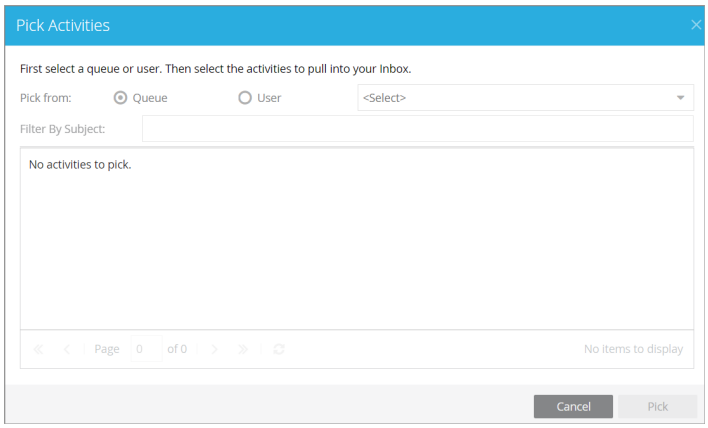
- You can pick specific emails from users and queues using the **Pick** button.
- You can configure your pull options and pull emails to the inbox using the **Pull** button.

Picking Emails From Users or Queues

To pick selected emails from users or queues:

1. In the Console toolbar, click the **Pick** button.
2. In the Pick Activities window, select the queue or user from where you want to get activities.
3. From the list of activities, select the activities you want to get and click the **Pick** button. You can reduce the number of activities that appear in the **Pick Activities** window by typing keywords in the **Filter By Subject** field. Use the page buttons at the bottom of the results to cycle through the pages of search results if necessary.

   Once you have selected the activities and clicked the **Pick** button, the activities are assigned to you, and displayed in the inbox.



Pick activities from users and queues

Pulling Emails Using Pull Options

- You can set your pull options for queues, and every time you click the **Pull** button, activities are assigned to you based on these options. To set your pull options, see "Setting Pull Options" on page 23.

To pull emails using options:

1. In the Console toolbar click the **Pull** button.
2. Activities are pulled and assigned to you according to the pull options settings in the Options window. If there are no activities that meet the pull criteria, you are notified that no activities were pulled.

Important Things to Note About Picking and Pulling:

- Agents can pick emails from other agents that belong to the same set of skill groups.
- Only agents who are part of a skill group that is associated with the queue can pick or pull from that queue.
- Only agents who match the attributes of a Precision Queue (PQ) that is associated with the ECE queue can pick or pull from that queue.
- Based on the **Maximum Task Limit** setting, agents who have reached their concurrent task limit can pick additional activities. The maximum number of activities is defined as part of the setting.
- When working on a non-interruptible chat or voice call:
  - Agents can pick or pull interruptible emails from queues and other agents.
  - Agents cannot pick or pull non-interruptible emails from queues or other agents.
- Agents with the Administrator Role can pick from the Default exception queue.

Viewing Emails

Email activities are displayed in the Email Inbox which can be accessed from the Console sidebar. These activities could assigned to you automatically based on your availability (page 24) or from picking or pulling the emails (page 59). Once activities are assigned to your inbox, you can select the activity to view it and work on it in the reply area.

You can select and view more than one email at a time. When more than one email activity is selected in the inbox, the following bulk actions are available:

- **Transfer**: Click the **Transfer** button in the reply area the selected activities to another user or queue. (page 73)
- **Reply**: Click the **Reply** button in the reply area to compose a reply for all the selected activities. (page 63)
- **Complete**: Click the **Complete** button in the reply area to complete the selected activities. (page 72)
- **Pin**: Click the **Pin** option in the **More Options** menu of the inbox to pin the selected activities to your inbox. (page 69)

Depending on the way your system is configured, you may be able to view the content of the incoming email in the text box in the Reply area, or in the Activity Body section under the Activity page. Some of the information a customer may share with you (birth dates, credit card numbers, etc.) can be masked to maintain confidentiality.

To view an email:

1. In Console sidebar, click the **Email inbox** button.
2. In the Email Inbox, select the activity by clicking on it.

   The Reply area refreshes to display the contents of the email activity. You may need to click the **Activity** button in the Info bar to view the content.

   You can view the customer's entire email history with other agents, providing you with additional information and conversational context. For more information, see "Viewing Conversation History" on page 36

3. If there are any attachments, the attachments are displayed above the body of the activity. You may need to expand area by clicking the **Expand** icon next to the To address to see them.

Multitasking with Phone Activities

Since phone is a real-time activity, when on a phone call, you have limited access to other work during that time. This is controlled by administrators using the department level setting “Service email and phone activities at the same time”.

- When the setting is enabled: During a phone call, you can continue to respond to emails that are already assigned to you. The **Send** and **Send and Complete** buttons are enabled for emails. However, no new emails get assigned to you while you are on a phone call. If you are associated with an outbound MRD, you can create outbound emails during a phone call.
- When this setting is disabled: During a phone call, you *cannot* respond to email activities that are already assigned to them. The **Send** and **Send and Complete** buttons are disabled for emails. Also, no new emails get assigned to you while you are on a phone call. You cannot create outbound emails while you are on a phone call.

Reply Types

While working on an email activity, you can change the type of reply to send by clicking the **Reply Type** button in the Reply area and selecting the appropriate option from the menu. By default, the reply type chosen is **Reply**. The available reply types are:

- **Reply**: Email is sent only *to* the original sender.
- **Reply to all**: Email is sent to all the addresses in the To, CC, and BCC fields.
- **Forward**: Email is sent from the alias at which the incoming email was received to all the address entered in the To, CC, and BCC fields.
- **Redirect**: Email is sent from the original sender of the email to all the addresses entered in the To, CC, and BCC fields. Use this option only if you wish to make the email appear as if it is from the original sender, and not from the system.

Upon selecting a reply type, the To, From, CC, and Subject fields expand to allow you to make the necessary changes.

Email Address and Subject

Editing the From, To, CC, or BCC Fields

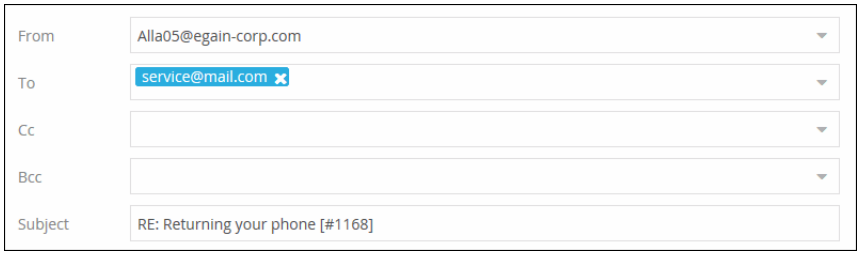
Upon first accessing the email, the To field and the email body are displayed. To edit the From, To, CC, BCC, and Subject fields, you can click the down-arrow button to the right to expand the area.

The From field contains the address displayed in the From field of the email header when the mail is received by the customer. By default, this field shows the address of the email aliases at which this email was received, but you may wish to change this under certain circumstances.

This is also the address that becomes the To address when a customer replies to the email. If you do not want the reply from the customer to come to the address specified in the From field, but want it to go to a different address, you can specify that email address in the **Reply to** field.

To edit the From, To, CC, or BCC fields:

1. Click the **Expand** icon by the To address.
2. Type or select the address that you want to use as the From address for your reply email to the customer.



Change the From email address

3. Type or select the address that you want to use as the To address to which your email will be sent.
4. Type or select the address that you want to use as the CC address to which your email will be sent.
5. Type or select the address that you want to use as the BCC address to which your email will be sent.

Editing the Subject

The subject field of the email indicates what the email is about. If the activity belongs to a case, it also contains the Case ID to which the activity belongs. When you send an email to the customer the system automatically adds the Case ID to the subject of the email. Make sure to use a subject that is concise and informative.

To edit the subject:

1. Click the **Expand** icon by the To address.
2. Type the subject in the subject field.

Composing Replies

Replying to an Email

Once you have selected the email, you can begin writing your reply in the reply area. There is no character limit for email replies and you can add and remove content as needed.

To reply to an email:

1. Select an email activity from your Email Inbox.
2. In the Reply area, type the content of the reply in the text box. You can add or enhance content with the tools in the Reply area. For more information, see "Email Reply Tools" on page 64.

   Depending on the way your system is configured, you may be able to view, edit, and delete the message of the incoming email here.

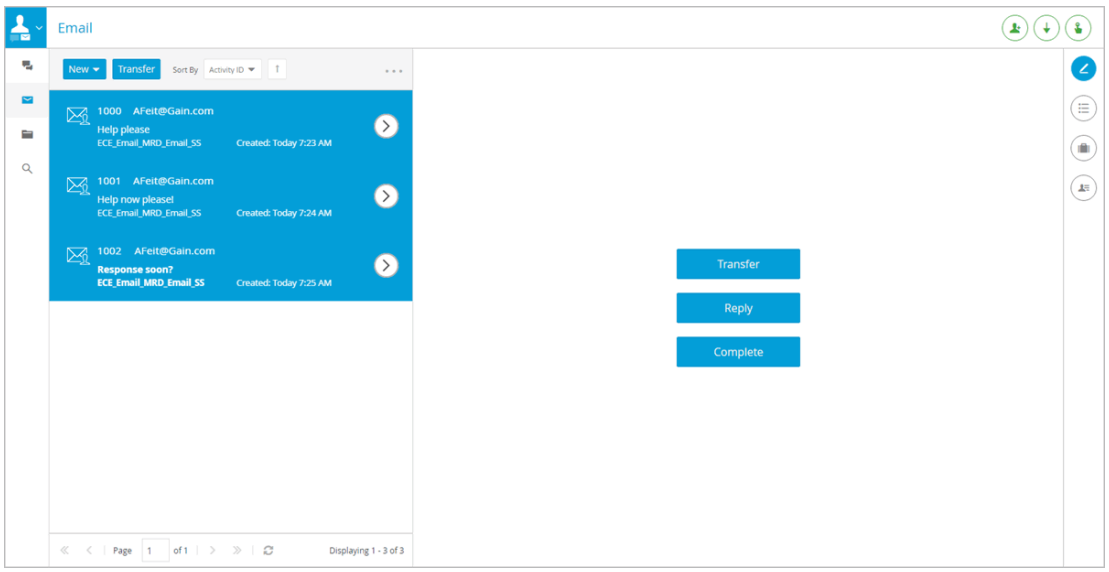
Important: Your reply is autosaved every 2 seconds. If you edit the contents of the text box and go to another activity before the autosave, you will lose your changes.

Replying to Multiple Emails

You can select multiple emails in your inbox and service them at the same time.

To reply to multiple emails:

1. Select more than one email in your email inbox.
2. In the Reply area, click the **Reply** button.



The reply area displays options for servicing multiple emails at once

3. The Reply area refreshes. Now you can select a reply type and compose a common reply that will be sent to all the selected email activities. You can add or enhance content with the tools in the Reply area. For more information, see "Email Reply Tools" on page 64.

   The email addresses for all the selected activities are added to the **To** field. While replying to multiple emails at once, the email addresses in this field cannot be changed or removed.

Email Reply Tools

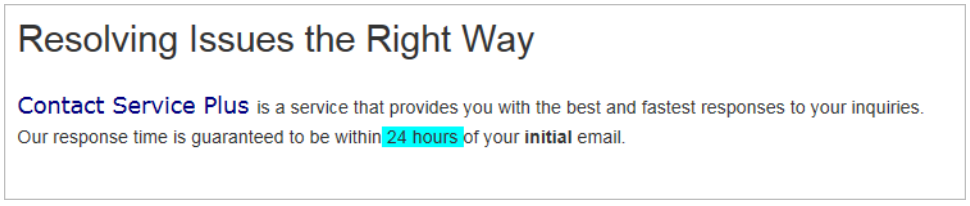
There are also a multitude of tools available to further enhance your reply. These tools can help you enhance the presentation of your reply, as well as provide additional resources to the recipient, such as attachments or hyperlinks. You can adjust the content of your replies by:

- Altering Content Styles
- Adding Articles
- Adding Macros
- Adding Hyperlinks
- Adding Images
- Adding Tables
- Adding Attachments
- Performing Spell Check

Altering Content Styles

When responding to emails your reply defaults to a format, font, and size. You can adjust this using the style dropdown menus, the alignment buttons, and the format buttons.

You can also change the color of the text or the color of the space behind it to highlight the text.



Adding Articles

Headers, Greetings, Signatures, and Footers are optional features that provide access to special KB articles for use in replies. If the activity belongs to a queue that has any such article associated with it, the text editor toolbar

displays the options under the **Articles** button which can be used to add the content of these articles to a reply.

To add articles replies:

1. In the text box toolbar, click the **Articles** button.
2. Hover your mouse over one of the following options: Header , Greeting , Signature , and Footer . Any articles that have been added to the corresponding knowledge base folders appear.
3. Select the article you wish to add.

   The system may also be set up to automatically populate the reply email with the contents of the header, greeting, signature and footer.

Adding Macros

Macros are shortcuts that contain paragraphs, simple sentences, or references to customer or user-specific information, such as names, addresses, and phone numbers.

There are multiple methods of adding macros to your responses. In the Text box toolbar, click the **Add macro** button to add macro. To prevent the macro from expanding right away, type the macro name with only two single-opening accent marks. The macro is expanded only when the message is sent.

To add macros to replies:

1. In the text box toolbar, click the **Insert Macro** button.
2. In the Add Macro window, navigate to and select a macro category, such as Combination, Formats, Case Data, etc.
3. In the list that appears on the right, select the desired macro.
4. Click **OK**.

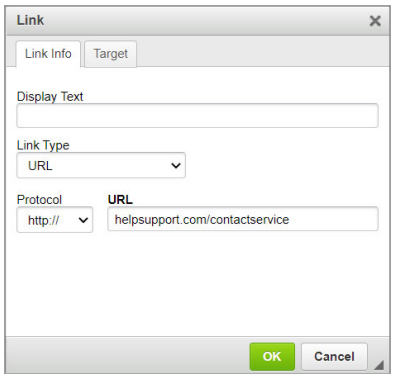
   The macro is added to the response with two opening quotes. The macro automatically expands upon sending the reply. However, if you wish to expand the macro prior to sending the reply, click the **Expand Macro** button.

Adding Hyperlinks

To add hyperlinks to replies:

1. In the text box toolbar, click the **Insert Hyperlink** button in the Text box toolbar. The Link window opens.

2. In the link window, under the Link Info tab provide the Display Text, and from the Link Type menu, select URL. In the URL field, type in the complete URL.



Type the web address

3. Under the Target tab, select the target behavior for the hyperlink from the dropdown menu. Adjusting this changes the link behavior so that when a user clicks the hyperlink, the link opens in the same window, a new window, as a popup, etc.
4. Click **OK**.

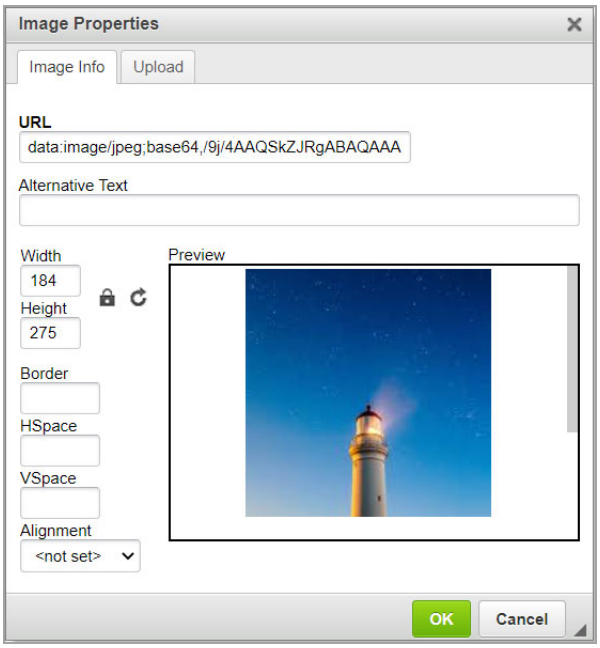
Adding Images

When adding images to your reply, follow the steps provided below. Do not copy and paste the image.

To add an image to a reply:

1. In the text box toolbar, click the **Insert image** button. In the Insert Image window, there are three tabs:
   - **Image Info:** Provide the basic information for an image, such as the image URL, alternative text, and size dimensions. If using an image URL, the image should be stored at a location that is accessible to an external user. If the image is removed from this external resource or the address is changed, the inserted image will no longer be visible.
   - **Upload:** If the image you want to use is not publicly available via URL, you can upload.
     i. Click the **Choose File** button to locate an image from your computer.
     ii. When you've selected an image, click the **Send it to the Server** button to make the image publicly available.

iii. In the Image Info tab, you can see the new URL for the image.



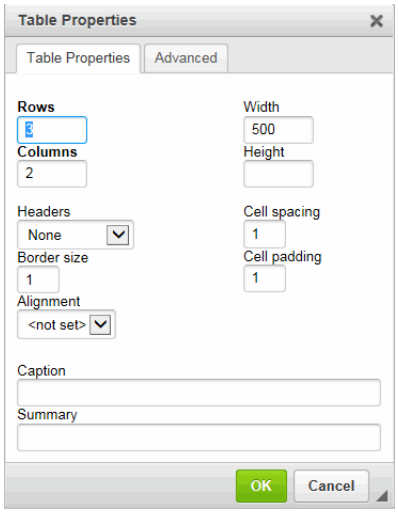
Type the URL of the image

2. Once you have provided the image, a preview appears in the Thumbnail preview section. In the image details section, you can adjust the height and width of the image as well as the vertical and horizontal padding to the image. To add the image to your response, click the **OK** button.

Adding Tables

To add tables:

1. In the text box toolbar, click the **Insert table** button.



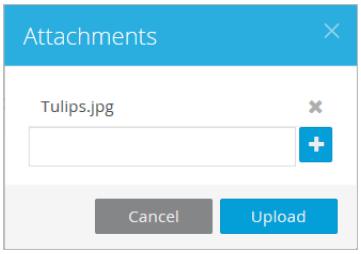
Edit the table properties

2. In the Table Properties window, specify the dimensions, properties, subject, and caption of the table.
3. In the Advanced tab, specify any additional details.

Adding Attachments

To add attachments:

1. Select the email to which you want to attach a file.
2. In the Reply area, click the **More Options** button.
3. Select the **Attachment** option.
4. Click the **Add** button.



Add attachments to the reply

5. Browse to the desired file and select it.
6. Click the **Upload** button to attach it to the activity.

   Note that the system replaces any special characters, like &*,$, % and so on, in the file name of attachments with an underscore before it is displayed in the Email Inbox. For example, a file named *info&feedback.doc* is renamed *info_feedback.doc*.

   You can attach more than one file at a time to an activity. Click the **Delete** button to remove any selected attachments from the activity.
7. When you are finished attached files to the activity, close the Attachments window.

   Once you have attached the file, the attachments you have added to the email are added to the area below the email subject line. Click an attachment if you wish to view or download it.

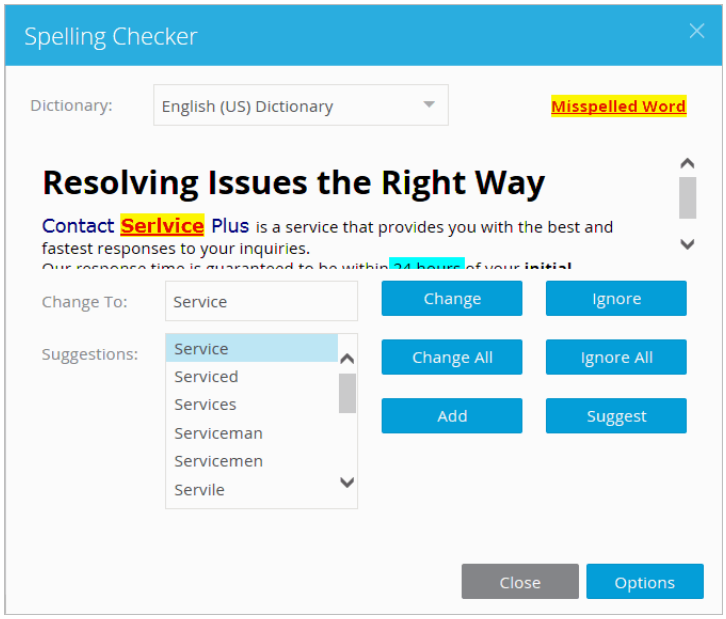
Performing Spell Check

If your administrator has configured auto spell check, the spelling checker runs automatically every time you send a reply.

To run the spelling checker:

1. In the text box toolbar, click the **Spell Check** button.
2. If errors are found, The Spelling Check window appears. This button is disabled if the article content is in a language that does not have spell-checker support. The Not in dictionary section shows the misspelled words in red and the Suggestions section shows the suggested words for them. You can either ignore the

suggestions or you can change the misspelled word to the suggested words. You can also suggest the word to be added to the dictionary by using the Suggest button. You can also add a word to your personal dictionary by clicking the **Add** button.



Add, change, suggest, or ignore checked words

3. Click the **Options** button to adjust your personal dictionary or spell check settings.
4. When spelling check is complete, click the **OK** button.

Pinning Email Activities

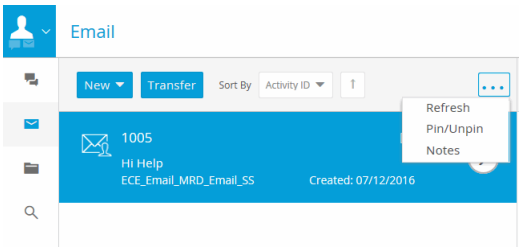
Email activities can be pinned to your inbox to indicate that you wish to continue to work on a particular activity, and do not want it to be moved to a queue or another user. Pinned activities are not pushed back automatically to queues. You can pin activities only if you have the Pin action assigned to you. A pinned activity can be pulled, but only by users who have the Unpin action assigned to them.

Pinning an Email Activity

To pin an email activity:

1. In the Email Inbox, select the email you want to pin. You can select multiple emails to pin at the same time.

2. In the Email Inbox toolbar, from the **More Options** dropdown, select **Pin/Unpin**.



Pinning an activity

A **Pin** icon appears in the inbox list indicating that the activity is pinned.

If you cannot see the **Pin** icon, contact your system administrator.

Unpinning an Activity

To unpin an activity:

1. Select the pinned activity from the inbox list.
2. In the Email Inbox toolbar, from the **More Options** button, select **Pin/Unpin**. The activity is unpinned.

Saving Drafts

You may wish to save a draft of your message in the Reply area without sending the reply or completing the activity. The application allows you to save a draft of your reply.

Always save a draft under the following circumstances:

- After making changes to a reply
- After attaching a file
- Before transferring an activity

Under the following circumstances, you do not need to save a draft:

- After adding a note to an activity
- Just before clicking the **Send, Send and Complete,** or **Complete** buttons

To save a draft:

- In the Reply area toolbar, click the **Save** button.

Sending Replies

The **Send** button is used to send your reply. When you send a reply to an incoming email and do not complete the activity, the original email stays in your Email Inbox and a new email activity is created and is sent to the customer. When you compose an outbound email, and send the email without completing the activity, the activity is removed from your Email Inbox while the reply is being sent to the customer. Once the email is sent to the dispatcher for processing, the original outbound activity is displayed in the Email Inbox again.

To send an email:

- In the Reply area toolbar, click the **Send** button.

  The reply is sent, but the activity remains open until it is completed. Sent replies for activities that have and have not been completed can be viewed in the **Sent Activities** folder.

Sending Replies and Completing Activities

To send and complete an activity:

- In the Reply toolbar, click the **Send and Complete** button. It sends the reply and sets the state of the activity to Complete.

Composing an Outbound Email

To create a new outbound email:

1. In the Inbox toolbar, point to the **New** button and select the activity shortcut you want to use to create the outbound email activity. You can choose from:
   - `Outbound Email for Current Case` (Shortcut key: F4)
   - `Outbound Email for New Case` (Shortcut key: F3)

   If you select **Outbound Email for Current Case**, the Reply area refreshes and you can begin composing your reply. Composing the content of an outgoing email is similar to replying to an incoming email. For details, see "Composing Replies" on page 63.

   If you select **Outbound Email for New Case**, a search window appears.
2. In the search window, provide the email address of the customer to whom you wish to send the outbound email.

Search for customer

3. Click the **Search** button. If no match is found, the system is configured by default to create a new customer automatically and display the email activity in the Email Inbox.
4. The Reply area refreshes and you can begin composing your reply. Composing the content of an outgoing email is similar to replying to an incoming email. For details, see "Composing Replies" on page 63.

Resending an Email

In the event when an email is sent to the customer and the customer contacts back saying he did not get an email, an email can be resent the customer without having to recreate a response.

Important: Only composed outbound emails can be resent. Responses to incoming emails cannot be resent.

To resend an email:

1. Use the console Search, or browse the **Sent Activities** folder to find the sent response.
2. In the Reply area, click the **Resend** button. If the case associated with the activity has been closed, the case is then reopened, the email is sent, and the case is closed again.

Resubmitting an Activity

If an activity was rejected by a supervisor, as part of the Outbound Email Review workflow, you may need to modify your reply and resubmit it.

To resubmit an activity:

- In the Reply area toolbar, click the **Resubmit** button. It sends the reply back to the supervisor for review.

  If the supervisor accepts the reply, it is sent to the customer. If your original action was a **Send and Complete**, the activity is closed. If your original action was **Send**, the reply is sent, but the activity is not closed.

Completing Email Activities

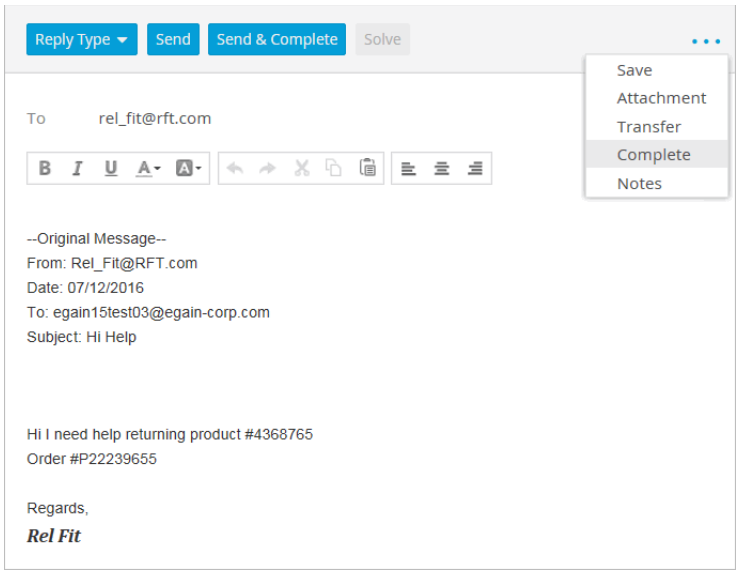
You can use this option if you have finished working on the email assigned to you and no reply needs to be sent to the customer. Multiple emails can be selected and completed at the same time.

When an activity is completed, it is removed from your inbox and sent to the Completed Activities folder. Once it is completed, a majority of the details pertaining to the activity can no longer be edited. If there are no other open activities in the same case, the case is closed. If, however, there are still other activities belonging to the same case that are still open, the case remains open, while this activity is marked completed.

Completed activities, open cases, and closed cases can all be viewed in the Folders list via the console sidebar. From here, you can review your work or see what else needs to be done to close the associated case.

To complete an activity:

1. In the Reply area, in the More Options menu, click the **Complete** button.



Complete the email activity

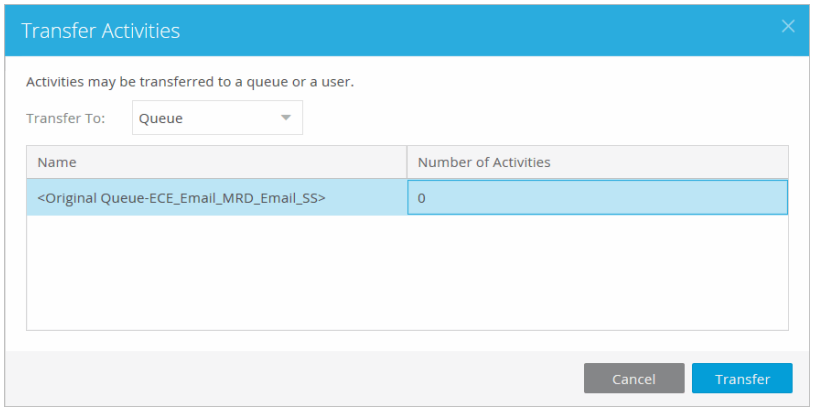
Transferring Emails

Emails can be transferred to users or queues depending on the MRD to which you belong. Before transferring activities, you can check the number of emails in a queue.

To transfer an activity:

1. In the inbox, select the activity you want to transfer.
2. In the Reply area or Inbox toolbar, click the **Transfer** button.
3. In the Transfer Activities window, set the following:
   - In the **Transfer to** field, from the dropdown list, select **user** or **queue**.

From the list of available users or queues, select the one to which you want to transfer the activity. In the Transfer Activities window, the queue from which the activity was assigned to you is tagged with the text `Original` and is displayed at the top of the list.



Transfer an email

4. Click the **Transfer** button to transfer the activity.

Important Things to Note About Transferring Emails:

- Multiple emails can be selected and transferred to another user or queue at the same time, so long as the emails are new and have no draft responses. If an email has any draft responses, or is not a new incoming email, it must be transferred individually.
- Outbound emails created by agents can only be transferred to users and not to queues.
- Disabled users are not listed in the list of users to whom you can transfer activities.
- You can transfer activities only if you have the Transfer action. For more information about actions, see the *Enterprise Chat and Email Administrator's Guide to the Administration Console.*

Transferring to Queues:

- Only agents who are part of a skill group that is associated with a queue can transfer emails to that queue.
- Only agents who match the attributes of a Precision Queue (PQ) that is associated with an ECE queue can transfer emails to that queue.

Transferring to Agents:

- Agents can transfer emails to other agents that belong to the same set of skill groups.
- Based on the **Maximum Task Limit** setting, agents can transfer additional activities to agents who have reached their concurrent task limit. The maximum number of activities is defined as part of the setting.
- Emails cannot be transferred to departments directly. If the **Allow Transfer of Activities to Integrated Queues in Other Departments** setting is enabled, agents can transfer activities to queues of other departments.

- If the **Allow email transfer to agents who are not available** setting is enabled, agents can transfer activities to other agents who are not available to work on new activities. To be able to transfer an email to an agent, the agent must be logged in to the application, should not have met the concurrent task limit, and should not be working on a non-interruptible activity. If these requirements are not met, the agent is not displayed in the Transfer Activities window.
- If the **Allow email transfer to agents who are not logged in** setting is enabled, agents can transfer activities to other integrated agents who are not logged in to the application. To be able to transfer an email to an agent, the agent should not have met the concurrent task limit. If this requirement is not met, the agent is not displayed in the Transfer Activities window.
- An agent can transfer interruptible email activities to another agent. An agent cannot transfer non-interruptible email activities to another agent. The concurrent task limit of the agent is considered in these instances.

7 Chats

- About Chats
- Chat Inbox
- Multitasking With Chat Activities
- Servicing Chat Activities
- Chat Reply Tools
- Completing Chats
- Viewing Chat Transcripts
- Linking Customers
- Transferring Chats
- Blocking Chat Users

About Chats

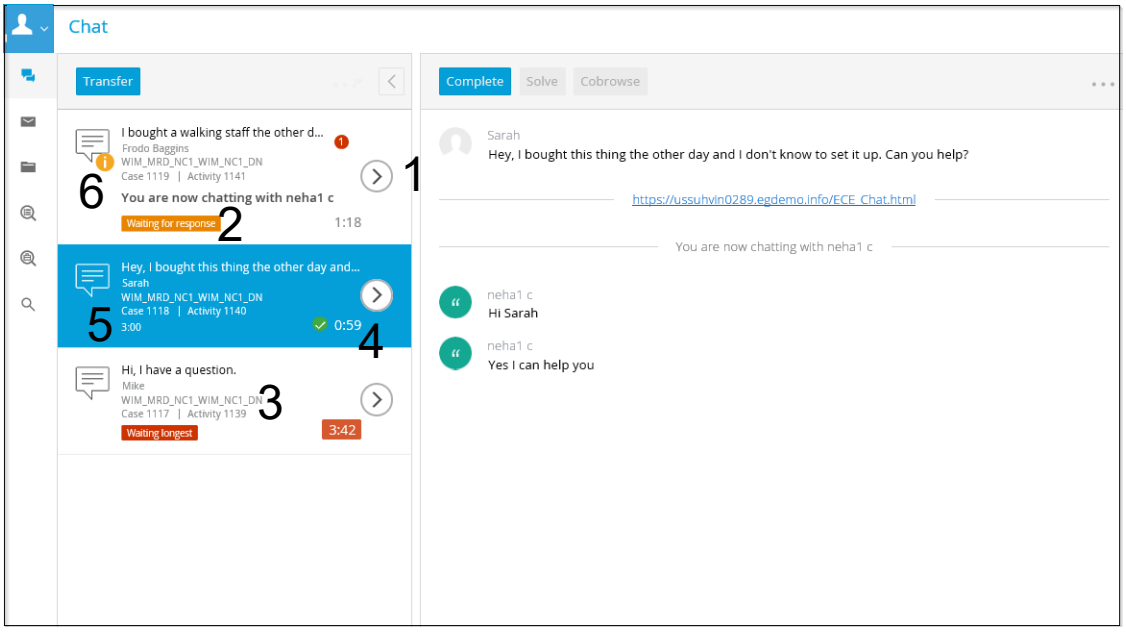
Chat allows you to service online customer requests in real time. A customer clicks on a link or button on a web page to initiate a chat session. Clicking this button or link takes the customer to an entry point (a page) from which the customer can chat with an agent. An agent responds to a customer's query from the Agent Console.

During a chat activity, along with exchanging text messages, an agent can send web pages to a customer.

Depending on the configuration of your system, some of the information a customer may share with you (birth dates, credit card numbers, and so on) can be masked to maintain confidentiality. Customers may also have the option of making their chat interactions go off-record in the event they need to share this sensitive data with the agent. While off-record, the chat transcript is not saved in the system.

Chat Inbox

You can see the status of all open chat activities in the Chat Inbox. The Chat Inbox contains six different elements that help the agent manage multiple chats simultaneously, as well as keeping the agent aware of each customer's status in the chat queue:



The chat inbox with multiple chat activities displayed.

1. Reply pane button
2. Chat status indicators
3. Chat information

4. Chat message timer
5. Chat wait time indicator
6. Chat icons

Chat Reply Pane Button

The chat reply pane button opens the selected chat in the chat reply pane. You can also double-click a particular chat activity to move it into the chat reply pane.

Chat Status Indicators

Chat status indicators are displayed below the case number and activity number and inform the agent of the customer's status in the queue. There are three different status indicators:

- **Waiting for Response:** This indicator appears if the customer has sent the last message in the chat conversation and is waiting for a reply from the agent. This indicator is displayed in yellow and is accompanied by a yellow timer.
- **Waiting Longest:** This indicator is displayed for the customer who has been waiting the longest for a reply from the agent. This indicator is displayed in red and will be accompanied by a flashing red timer
- **Customer Exited:** This indicator is displayed if the customer exits the chat or is disconnected.

Chat Information

Each chat activity tab provides the agent with the customer's name, the name of the chat queue, the case number, and the activity number. A snippet of the customer's initial message is also shown above the customer's name.

If a customer continues to respond while the agent is working on another chat activity, snippets of the last message they sent are displayed in bold below the chat information.

Chat Response Timer

The chat response timer is displayed next to each chat status indicator and shows the time that has elapsed since the agent last replied to the customer. This timer will reset whenever the agent responds. Chat response timers are displayed in yellow for inactive conversations, while the customer who has been waiting the longest for an agent response will display a flashing red chat timer.

The chat response timer will continue to run until the agent completes the chat activity, even if the customer has already left the chat.

Chat Wait Timer

The chat wait timer displays the total time that has elapsed since the customer first entered the chat queue. This includes any time that the customer has spent waiting in the queue before the agent pulled the chat and created a chat activity.

This timer will continue to run until the customer leaves the chat.

Chat Icons

There are a variety of different chat icons that appear in the Chat Inbox. They typically appear in two places: next to the speech balloon image in the Chat Inbox or next to the reply pane button. Hovering your mouse over an icon provides a brief description of what that icon represents.

- **Green check mark icon:** The green check mark appears next to the reply pane button if the agent sent the last message in the conversation. This is replaced by the chat wait timer if the customer sent the last message.
- **Yellow i icon:** Displayed next to the speech balloon image and indicates that the customer's connection is slow.
- **Red thunderbolt icon:** Displayed next to the speech balloon image and indicates that the customer has left the chat.
- **Red number icon:** Appears next to the reply pane button if the customer continues to send messages while the agent is working on another chat activity. Displays the number of messages sent by the customer and disappears once the agent responds.

Multitasking With Chat Activities

Chat is a real-time activity. While in a chat session, you have limited access to other work. This is controlled by administrators using the department level setting **Service email and chat activities at the same time**.

- When the setting is enabled: During a chat, you can continue to respond to emails activities that are already assigned to you. The **Send** and **Send and Complete** buttons are enabled for emails. However, no new emails can be assigned to you while you are in a chat session. If you are associated with an outbound MRD, you can create outbound emails during a chat session.
- When this setting is disabled: During a chat session, you cannot respond to email activities that are already assigned to you. The **Send** and **Send and Complete** buttons are disabled for emails. Also, no new emails can be assigned to you while you are in a chat session. You cannot create outbound emails during a chat session.

Servicing Chat Activities

To send messages to the customer:

1. In the Console sidebar, click the **Chat inbox** button.
2. Select an activity from your Chat inbox.

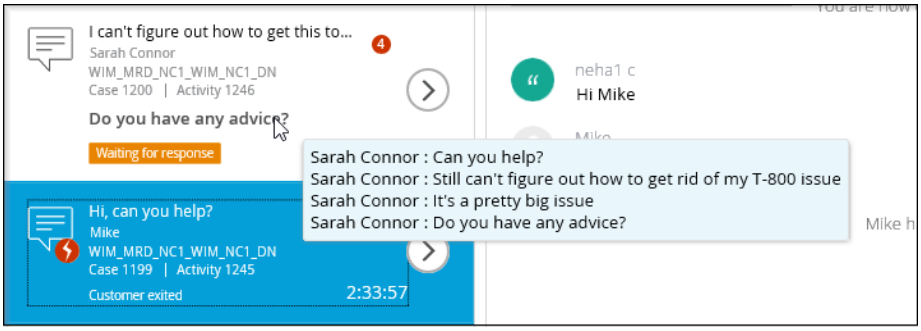
   You can view the customer's entire chat history with other agents, providing you with additional information and conversational context. For more information, see "Viewing Conversation History" on page 36

3. In the Reply area, type your response and press ENTER on the keyboard to send the message to the customer. Press SHIFT + ENTER to add a line break.

   You cannot type more than 800 characters into your response before sending it. There is no limit on the number of messages you or the customer can send to each other during a chat session.

4. The activity remains open until it is completed. For more details, see "Completing Chats" on page 86.

You can also view the chat history for inactive chats you are not currently working on. Hovering the mouse over the bold text displayed above the chat status indicator lets you review all the messages that have been sent by the customer since your last response.



Viewing the history of an inactive message.

Chat Reply Tools

There are multiple methods in which you can add to or improve your replies to customers as you chat with them. From simply changing the color of your font, to pushing pages to customers, there are a variety of tools available to add to and improve your interaction with customers. You can affect your interactions with customers by:

- Changing the Text Color
- Adding Smileys
- Sending Quick Responses
- Adding Links
- Adding Macros
- Performing Spell Check
- Pushing Pages
- Sending Chat Attachments
- Going Off the Record

Changing the Text Color

To change the text color:

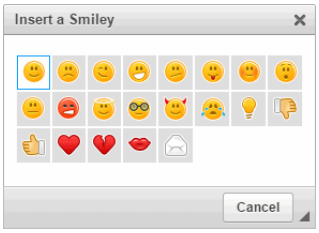
- Select the text in the text box and click the **Text color** button. Choose the color you want.

Change the color of the reply text

Adding Smileys

To add a smiley to your message:

- Click the **Smiley** button and, from the Insert a Smiley window, select the desired emoticon for your message.



Insert a smiley

Sending Quick Responses

If your administrator has configured quick responses for commonly used chat messages, you can use one to quickly send a page or text reply to the customer.

To send quick responses to the customer:

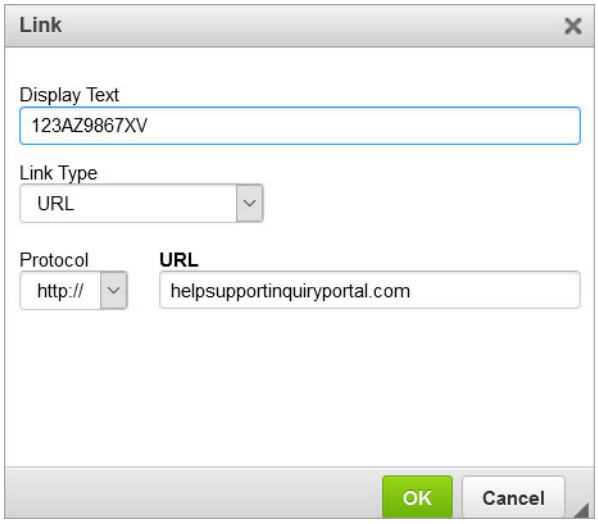
1. In the text box toolbar, click the **Quick responses** button.
2. Select the quick response you wish to use. The text of the quick response then appears in the Text box.
3. Review the contents of the quick response and make any changes, as required.
4. Press ENTER to send the message to the customer.

Adding Links

A link can be inserted into the text body of an agent response.

To add links to your message:

1. In the text box toolbar, click the **Add link** button.
2. In the Link window, from the Link Type menu, select URL.



Type the web address

3. In the URL field, type in the complete URL.
4. Click **OK**.

Adding Macros

Macros are shortcuts that contain paragraphs, simple sentences, or references to customer or user-specific information, such as names, addresses, and phone numbers.

There are multiple methods of adding macros to your responses. In the Text box toolbar, click the **Add macro** button to add macro. To prevent the macro from expanding right away, type the macro name with only two single opening accent marks. The macro is expanded only when the message is sent.

To add macros to replies:

1. In the text box toolbar, click the **Insert Macro** button.
2. In the Add Macro window, navigate to and select a macro category, such as Combination, Formats, Case Data, etc.
3. In the list that appears on the right, select the desired macro.
4. Click **OK**.

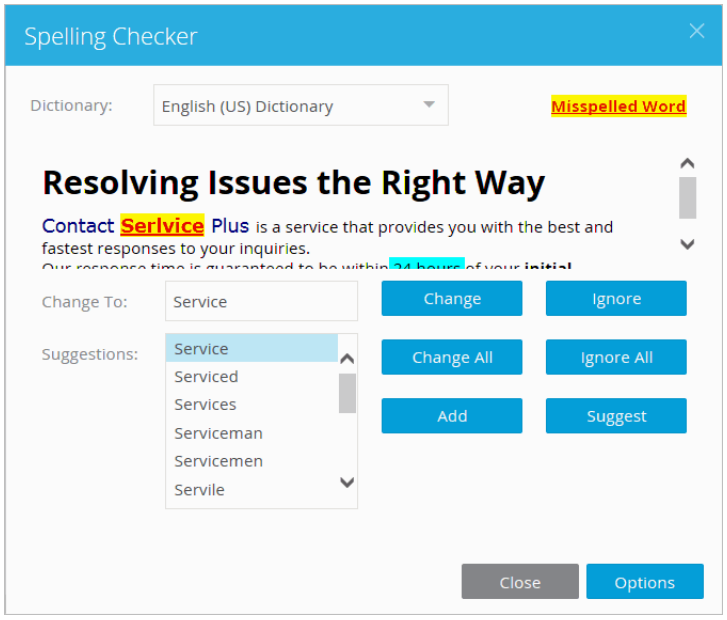
The macro is added to the response with two opening quotes. The macro automatically expands upon sending the reply. However, if you wish to expand the macro prior to sending the reply, click the **Expand Macro** button.

Performing Spell Check

A spell check can be performed before sending a message to the customer.If your administrator has configured auto spell check, the spelling checker runs automatically every time you send a reply.

To run the spelling checker:

1. In the text box toolbar, click the **Spell Check** button.
2. If errors are found, The Spelling Check window appears. This button is disabled if the article content is in a language that does not have spell-checker support. The Not in dictionary section shows the misspelled words in red and the Suggestions section shows the suggested words for them. You can either ignore the suggestions or you can change the misspelled word to the suggested words. You can also suggest the word to be added to the dictionary by using the Suggest button. You can also add a word to your personal dictionary by clicking the **Add** button.



Add, change, suggest, or ignore checked words

3. Click the **Options** button to adjust your personal dictionary or spell check settings.
4. When spelling check is complete, click the **OK** button.

If block check is configured, then your message is checked for any blocked words before sending. If the message contains any blocked words, you are displayed a prompt to delete those words before sending the message to the customer.

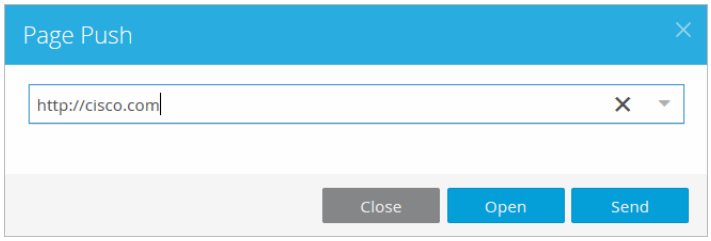
Pushing Pages

During a chat session you can send web pages to customers. You can send web pages only for those chats that come through the entry points for which your administrator has enabled page pushing.

To send a web page to the customer:

1. In the top right corner of the Reply area, click the **More Options** icon and select **Page Push**.
2. In the Page Push dialog window, select or enter the URL of the page you want to send to the customer.

   If your administrator has configured any quick links, you can use them to quickly send the web page to the customer. Any pages you have already pushed to customers also appears in this dropdown.



Select a URL

   You can preview the page by clicking Open. If this section is configured for pop-up mode, the web page opens in a pop-up window or a new tab.

3. In the Page Push dialog window, click the **Send** button. The customer receives this page and views its contents.
4. To send another page, repeat steps 2-4.

   If the administrator has blocked any web pages then you cannot send them to the customer. The blocked pages do not get pushed to the customer, but you can view them in your view port.

Sending Chat Attachments

During a chat session, agents and customers can send file attachments to one another. Once the attachment has been sent by either the agent or the customer, the recipient can accept or deny the file. The recipient must accept the attachment in order to download the file.

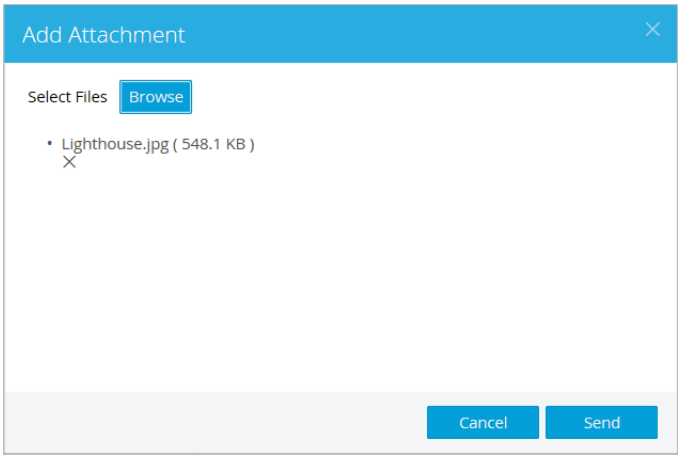
If the accepted attachment file is an image, it appears in-line in the chat transcript while the chat interaction is active. You can view all the received and sent attachments in the Activity Body section.

Important: Chat attachments must be enabled at the partition level and configured for the queue in order to send and receive attachments during chats. Depending on the configuration of your deployment, certain file types may be restricted.

To send attachments during a chat:

1. In the top right corner of the Reply area, click the **More Options** icon and select **Attachment**.
2. In the Add Attachment window that appears, click the **Browse** button.

3. In the Choose File to Upload window that appears, navigate to the desired file and click **Open**. The window closes.



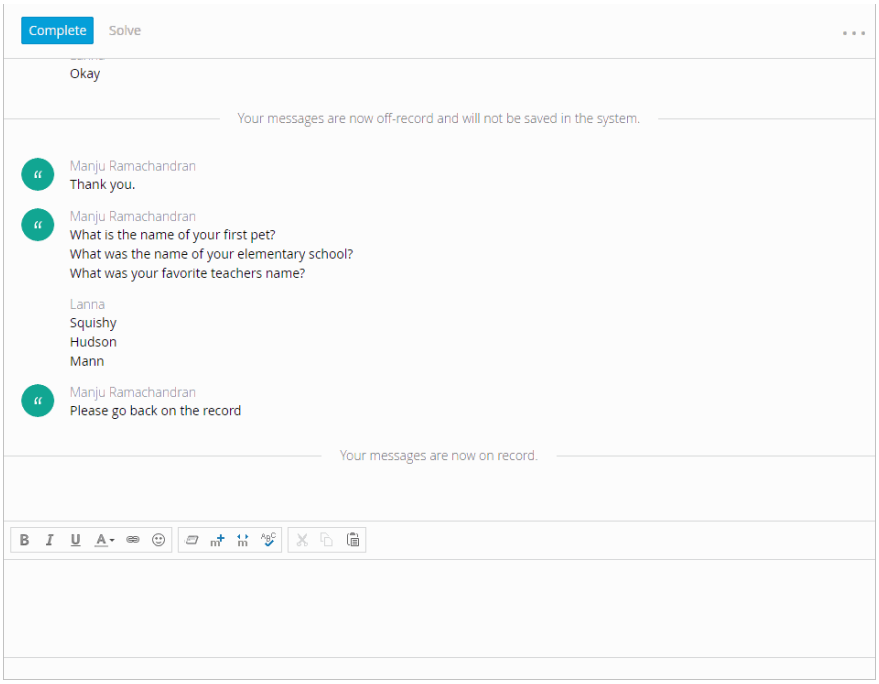
Select a file attachment to send during a chat

4. In the Add Attachment Window, click the **Send** button to send the attachment. If you want to change the file you have selected before sending it, you can browse to a different file and select it or click the **Delete** button to remove the file. You can only send one file at a time.

Going Off the Record

If data masking is enabled, sensitive information you share with the customer (credit card info, etc) may be censored during the chat. The customer can disable the data masking by going “Off the Record”. When the customer clicks the **Go Off Record** button in the chat window, the data can be shared between the agent and customer, but any messages sent while off the record are not saved in the transcript when the activity is

completed to keep the customer's sensitive information confidential. Customers can go back on-record if they wish to re-enable the masking of sensitive data.



Data is masked in chats until the customer clicks the Go Off Record button

Completing Chats

After when the customers' needs have been met and you wish to end the chat session, you can click the **Complete** button to complete the activity. When you click the **Complete** button, the activity is completed, the Reply area for the activity closes, and the activity appears in the **Completed** folder of the inbox.

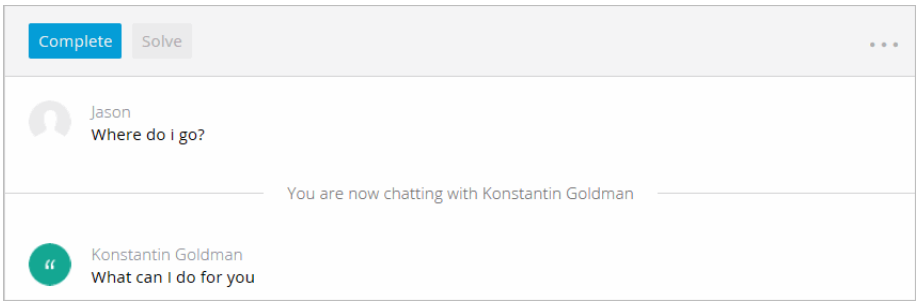
Important: You must complete all chats before logging out of the application.

Once it is completed, a majority of the details pertaining to the activity can no longer be edited. If there are no other open activities in the same case, the case is closed. If, however, there are still other activities belonging to the same case that are still open, the case remains open, while this activity is marked completed.

Completed activities, open cases, and closed cases can all be viewed in the Folders list via the console sidebar. From here, you can review your work or see what else needs to be done to close the associated case.

To complete a chat:

- In the Reply area toolbar, click the **Complete** button to complete the activity. When you complete a chat the customer is shown a Survey form.



*Click the **Complete** button*

Viewing Chat Transcripts

In the Activity Body tab of the Activity page, you can view the full transcript of the chat session. The activity transcript can only be viewed for completed chat activities and not for chats that are in progress. The chat transcript contains the complete text of the chat as well as any links to web pages and attachments that were sent during the chat session.

Linking Customers

Your website might be configured to allow visitors to start chat sessions without providing any personal details, such as name, email address, etc. Such visitors are created as anonymous customers in the system, and no customer record is created for the chat activity. If at a later point the visitor is identified as a customer, or you need to create a new customer record for the visitor, you can do so by going to the Customer section and clicking the **Change** button available in the Customer Details tab. Customers must be linked to an activity before the agent completes the activity.

To link a chat activity to a customer:

1. In the Reply area, click the **Link Customer** button.
2. In the Link Customer window, provide the necessary search terms to locate a customer in the system to which you want to associate the activity. By default, the window asks for the name, email address, and phone number, but it can display different options based on how your administrator has set up the window.

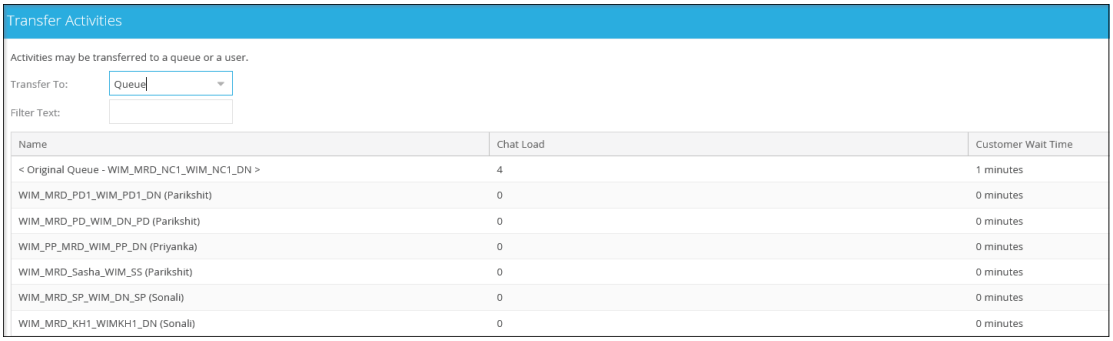
   If the search returns a matching result, the chat activity is associated with the customer. If the customer does not exist, a new customer record is created for the activity.

Transferring Chats

Chats can be transferred to users or queues for which you have been granted transfer permissions. The customer wait time for a queue is also displayed in the Transfer Activities window.

To transfer a chat:

1. In the Chat Inbox, select the chat you want to transfer.
2. In the Reply area, click the **More Options** button. Select **Transfer** from the dropdown menu.
3. In the Transfer Activities window, select the agent or queue. The window refreshes to display all available agents or queues you which you can transfer activities, depending on the MRD to which you belong.



Transfer the activity to a new queue

4. Select the desired destination for the activity.
5. Click the **Transfer** button.

Important Things to Note About Transferring Chats:

- Only one chat activity can be transferred at a time.
- Only open chat activities, in which the customer has not left the chat session, can be transferred.
- Disabled users are not listed in the list of users to whom you can transfer activities.
- You can transfer activities only if you have the Transfer action. For more information about actions and permissions, see the *Enterprise Chat and Email Administrator's Guide to the Administration Console.*

Transferring Chats to Queues:

- Only agents who match the attributes of a Precision Queue (PQ) that is associated with an ECE queue can transfer chats to that queue.
- Chats cannot be transferred to departments directly. If the **Allow Transfer of Activities to Integrated Queues in Other Departments** setting is enabled, agents can transfer activities to queues of other departments.
- A chat can be transferred to any queue that belong to the same media class. From there, the activity is routed based on the queue-to-script mapping.

- To be able to transfer a chat to a queue, at least one agent who can receive work from that queue must be logged in, must be available, and must not have met the concurrent task limit. The queue must also not be at its maximum task limit.

Transferring Chats to Agents:

Agents who do not meet these conditions are not displayed in the transfer window.

- Agents can transfer chats to other agents that belong to the same set of skill groups.
- Only agents who are part of a skill group that is associated with a queue can transfer chats to that queue.
- The receiving agent must be logged in to the application.
- The receiving agent must be available, depending on how the **Allow chat transfer to agents who are not available** setting is configured.
- The receiving agent should not have met the concurrent task limit, unless you are working on non-interruptible chat activities. This may be affected by the **Override CTL** setting.
- Based on the **Override CTL** setting, agents can transfer additional activities to agents who have reached their concurrent task limit. The maximum number of activities is defined as part of the setting.
- If the **Allow chat transfer to agents who are not available** setting is enabled, agents can transfer activities to other integrated agents who are not available to work on new activities. To be able to transfer a chat to an agent, the agent must be logged in to the application. Also, the agent should not be at the concurrent task limit (CTL), and the queue associated with the agent should not be at its maximum task limit (MTL). If the CTL and MTL for the agent have been reached, or if the agent is not logged in, the agent is not displayed in the Transfer Activities window.
- An agent can transfer chat activities to another agent who is working on an interruptible email activity or a non-interruptible chat activity. If the receiving agent is working on a non-interruptible voice call, only interruptible chat activities can be transferred to that agent. Agents working on non-interruptible voice calls cannot be transferred non-interruptible chats.

Blocking Chat Users

Agents can use the Block function to ban automated spam bots or customers who are being disruptive or abusive from the chat queue. Blocking a customer prevents them from further communicating with the agent, as well as banning them from initiating any future text or video chats for a pre-determined period of time.

Note that the Block function must be enabled by the administrator in the Administration Console before it can be used by agents. For more information about enabling this functionality, see *Enterprise Chat and Email Administrator's Guide to Administration Console*.

To block a customer:

1. In the chat Reply area, click the **More Options** ··· button.
2. From the expanded list, click the **Block** option.
3. Click the **Yes** button to confirm the block when prompted by the system.

- The message “This chat has been blocked by the agent” appears in the Reply area. The customer is now banned from the chat queue for the amount of time specified by the administrator.

8 Searching for Information

- About Searches
- Conducting Searches
- Saving Searches
- Running Saved Searches
- Deleting Saved Searches
- Creating Search Folders

About Searches

The easiest way to locate an object in the Agent Console is to search for it. The Search feature in the Agent Console is an effective tool to locate activities, cases, customers, etc. You may search for an activity or a customer by using basic or advanced form of the searches. The Basic search enables you to search by customer name or activity ID. The Advanced search provides additional search options, such as creation date of the customer or activity.

There are a variety of different objects for which you can search and there are multiple ways to do so.

- **Simple Search:** Look for objects based on advanced attributes such as due date and substatus.
- **Complex Search:** Look for objects based on the attributes of objects that are related to the objects that you are looking for. For example, if you are searching for activities that all belong to a case, and you only know the case ID, you can use the Relationship Search to locate activities by case ID.
- The My Searches option, which allows you to quickly locate activities and cases, is available from the Folders pane. For more information about the My Searches option, See “Saving Searches” on page 98.

Important: You must enter at least 5 characters to run a search.

Search Window Elements

The Search window has the following elements or functional areas:

- **Criteria pane:** Use this pane to create, run, save, and delete searches.
- **Results pane:** Use this pane to locate items in the result in the Agent Console. You can also export results as a .csv file from this pane.

What Objects Can I Search?

The search feature that is available from Agent Console sidebar allows you to locate customers, cases, activities, and other objects in the system that meet certain criteria.

Agent Console users can search for the following objects:

- Activity
- Case
- Customer
- Customer contact person
- Customer contact point

The object that is selected determines the various columns and fields that appears in the Results pane when a search is run. If you want to change the sort order of the search results, click any of the columns at the top of the results. Note that the sort order differs with each column, as some may be alphabetically ordered,

chronologically ordered, numerically ordered, etc. The following table outlines the different columns of the Results pane and how they are sorted.

Column	Description
Activity ID	The unique identifier of the activity. Sorting of this column is done numerically. This column appears in an Activity search.
Subject	The subject of the activity. Sorting of this column is done alphabetically. This column appears in an Activity search.
Assigned to (username)	The username of the agent to whom the activity is currently assigned. Sorting of this column is done alphabetically. This column appears in an Activity search.
Created on	The date on which the activity was created. Sorting of this column is done chronologically. This column appears in an Activity search.
Priority	The chat priority of the activity, ranging from 1-7. Sorted numerically. This column appears in an Activity search.
Substatus	The current substatus of an activity, such as AssignedNew, Assigned-In Progress, etc. Sorted alphabetically. This column appears in an Activity search.
Queue name	The name of the queue in which the activity resides. Sorting of this column is done alphabetically. This column appears in an Activity search.
Department name	The name of the department in which the activity resides. Sorting of this column is done alphabetically. This column appears in an Activity search.
Reason for last action	A brief description of the last action performed on an activity. This includes statuses such as Save draft, Sent, Completed, Forwarded, Assigned for supervision, Accepted by supervisor, Rejected by supervisor, among others. Sorting of this column is done using internal values. This column appears in an Activity search.
Case ID	The unique ID of the case. Sorting of this column is done numerically. This column appears in an Activity and a Case search.
Status	The current status of a case (Open or Closed). Sorting of this column is done alphabetically. This column appears in a Case search.
Customer ID	The ID of a customer. This may include a customer's full name, or the customer may be marked anonymous, depending on how the system has been configured. Sorting of this column is done alphabetically. This column appears in a Case search.
Owner (username)	The username of the agent who is the owner of the case. Sorting of this column is done alphabetically. This column appears in a Case search.
Severity	The severity of the case ranging from Low to Urgent. Sorting of this column is done by level of severity. This column appears in a Case search.
Due on	The date on which the activity or case is expected to be completed. Sorting of this column is done chronologically. This column appears in an Activity and a Case search.
Salutation	The preferred title of the customer (Mr., Mrs., Ms., Miss). Sorting of this column is done alphabetically. This column appears in a Customer contact person search.
First name	The first name of the contact person. Sorting of this column is done alphabetically. This column appears in a Customer contact person search.
Middle name	The middle name of the contact person. Sorting of this column is done alphabetically. This column appears in a Customer contact person search.

Column	Description
Last name	The last name of the contact person. Sorting of this column is done alphabetically. This column appears in a Customer contact person search.
Customer name	The name of the customer associated with the contact person or contact point. Sorting of this column is done alphabetically. This column appears in a Customer contact person and contact point search.
Contact point type	The type of contact point, which is one of the methods of contacting a customer. This includes Email, Phone, Postal, and Web. Sorting of this column is done alphabetically. This column appears in a contact point search.
Contact person name	The full name of the contact person attached to the contact point. Sorting of this column is done alphabetically. This column appears in a contact point search.
Contact point data	The contact point registered to a customer. This is the email address, phone number, home address, web URL, etc. Sorting of this column is done alphabetically. This column appears in a contact point search.
Customer	The full name of the customer. Sorting of this column is done alphabetically. This column appears in a Customer search.
Type	The type of customer, such as Individual, Group, or Corporate. Sorting of this column is done alphabetically. This column appears in a Customer search.
Level	The customer priority level ranging from Standard to Premium. Sorting of this column is done based on priority level. This column appears in a Customer search.

What Can I Do With Search Results?

Once you have entered the values that you want to search, you can click the Start Search button to run the search. Also, you can save the search criteria using the Save button or the Save as option from the More Options menu.

In the Results pane of the Search window, the results of your search are displayed. Important details to consider when reviewing search results and attempting to pull or transfer the activities include:

- Is the activity open or closed?
- Is the activity already assigned to a user?
- Do you have pull/transfer permissions?

Depending on the objects that are displayed in the Results pane, these factors, and how the administrator has configured the application, the following toolbar buttons may be available. Your administrator may have set up the system, and your permissions, to allow you to search for only some of these objects.

Use	To
Pick	Pull the selected activities or cases into your inbox. You can pick multiple activities at once.
Transfer	Transfer the selected activities or cases to another department, queue, or user. You can transfer multiple activities at once.
Refresh	Refresh the contents of the Results pane; this is the same as re-running the search.
Export	Export search results to a CSV (comma separated values) file.
Print	Print out the search results.

Conducting Searches

There are two different levels at which you can search for activities. A Simple search, and if your search terms need to be more obscure and specific, you can escalate further to a Complex search.

Important: If your search is taking a while to complete or you have too many search results, try narrowing down your search with more detailed search parameters.

You can select the **Search** option from the sidebar to conduct a search. The Simple version allows you to search for specific details about the activity, case, etc. The Complex version allows you to add criteria to search for objects based on their relation to other attributes using the **Add New Criteria** button. The following table lists related objects for each type of object.

Use	To
Activity	▸ Activity ▸ Case ▸ Customer ▸ Customer contact person ▸ Customer contact point ▸ Email ▸ Classification
Case	▸ Activity ▸ Case ▸ Customer ▸ Customer contact person ▸ Customer contact point
Customer	▸ Activity ▸ Case ▸ Customer ▸ Customer contact person ▸ Customer contact point
Customer contact person	▸ Customer ▸ Contact Person
Customer contact point	▸ Customer ▸ Contact person ▸ Contact point

Important: Sorting of Advanced search results is enabled only for Activity ID, Case ID, Customer ID, Customer Name, First Name, Last Name, Created on, Due on, Subject, Queue name, Department name, Assigned To, Status, Substatus, and Contact point data.

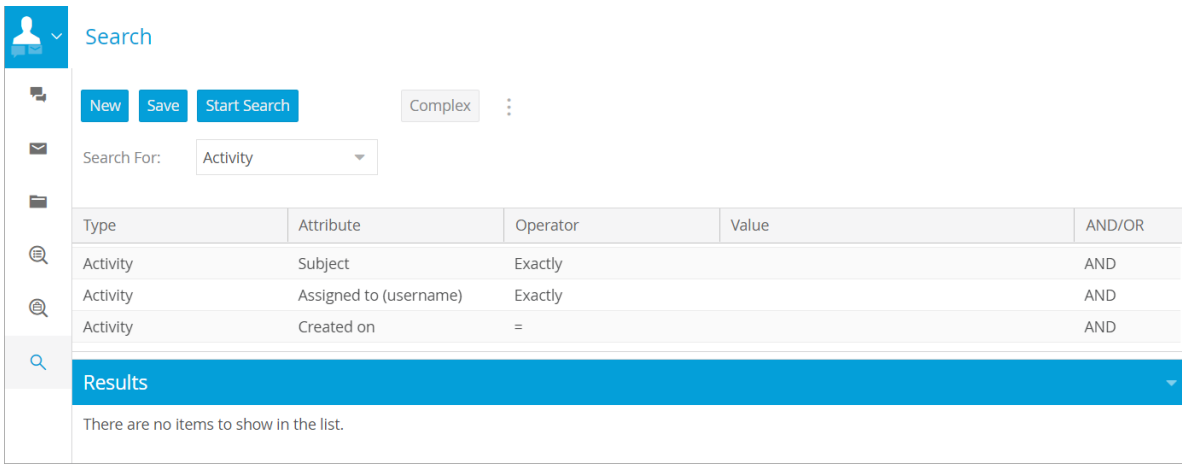
Running Simple Searches

To run a simple search:

1. In the console sidebar, click the **Search** button.
2. If a pre-existing search is already present in the window, click the **New** button in the toolbar to start a new search.

   You can also use a previously saved search to search for an activity. For more details, see "Running Saved Searches" on page 98.
3. From the **Search For** dropdown list, select from one of the following options depending upon what you want to search for:
   - **Activity**
   - **Case**
   - **Customer**
   - **Contact person**
   - **Contact point**
4. From the **Simple** view, provide the following to set the criteria for executing a search:
   - Select an **Attribute**. For example the Activity ID, Case ID, Customer Name, or Subject.
   - Select the **Operator** from the drop down list.

     Note, when searching for an Activity Subject with the "Contains" operator, you must use at least 5 characters and when searching a customer's name with the "Contains" operator, you must use at least 2 characters.
   - Enter the **Value** you want to search.
   - Enter the appropriate boolean character: **AND/OR**, to be used between words to specify the relationship.



Search for activities

5. After entering the search criteria, click **Start Search** to run the search.

6. Search results are displayed in the Results section. To view more information about the activity, click the object hyperlink. You can export the search results to a `.csv` format by clicking the **Export** button. You can also print your search results by clicking the **Print** button and using the browser's print options.

Running Complex Searches

To run a complex search:

1. In the console sidebar, click the **Search** button.
2. Click the **New** button in the toolbar to start a new search.
3. From the **Search For** dropdown list, select from one of the following options depending upon what you want to search for:
   - **Activity**
   - **Case**
   - **Customer**
   - **Contact person**
   - **Contact point**
4. Click the **Complex** view button. The page refreshes.
5. Click the **Add New Criteria** button. The Add New Criteria window opens.
6. In the Add New Criteria window, provide the following to set the criteria for executing a search:
   - From the **Type** dropdown, select the object type for the search criteria.
   - From the **Attribute** dropdown, select one of the available attributes. This list changes based on the type you selected.
   - Select an operator from the **Operator** dropdown. Operators include: Exactly, Begins with, Contains, Does not contain, Ends with, =, !=, <, <=, >, >=, Between, Not between.
   - Input a value. The inputs for this field change based on the attribute and operator you selected. You can search using special characters such as umlaut characters (Ö, ü, ï), : "" etc. If you are using the Exactly operator, you can also use the following special characters ($ & * ^ % _ ( ) # ") in your search criteria. Additionally, email searches can use the following special characters (+ ~ - ! |).
   - Select AND or OR from the **AND/OR** dropdown.
   - Click **OK**.
7. Repeat the process to add more search criteria as necessary. At least one search criteria is required to perform a search. You can edit your criteria by clicking the **Edit** icon. You can delete the criteria by click the **Delete** icon. When you have added all your necessary search criteria, click the **Start Search** button.
8. Search results are displayed in the Results section. To view more information about the activity, click the object hyperlink. You can export the search results to a .csv format by clicking the **Export** button. You can also print your search results by clicking the **Print** button and using the browser's print options.

Saving Searches

You can save the search criteria that you use most commonly. This helps you save time, as you can open the saved search criteria and run them quickly. Only users with the **Saved search - Create** action can create global searches. You do not need this action to create personal searches.

To save search criteria:

1. In the Search window, create a search by entering the search criteria that you wish to save.
2. To save the search, click the **Save** button. You can also use the **Save As** option from the **More Options** button.
3. In the Save Search As window, provide the following details.
   - **Name**: Type a name for the search criteria. Use a name that adequately represents the search attributes.
   - **Type:** From the dropdown list, select the type of search. The options available are:
     - **Global:** A global search is available to all users. This option is not available to agents who have not been assigned the **Saved search - Create** action.
     - **Personal:** A personal search is available only to the user who creates it.
4. Click the **Save** button to save the search criteria.

Running Saved Searches

To run a saved search, you must first locate it and open it.

To open a saved search:

1. In the Search window, click the **More Options** button.
2. From the More Options dropdown, select **Open**.
3. In the Open Search window, select the search that you want to open and click the **Open** button.

   The search criteria is displayed in the Search window. Now you can begin the search.
4. Click the **Start Search** button to begin the search.

Deleting Saved Searches

The system allows you to delete the search criteria that are no longer needed. Only users with the **Saved search - Delete** action can delete global and personal searches.

To delete a search criteria:

1. Select the search criteria in the Open Search, Save Search, or Save Search As window.
2. Press the **Delete** key on the keyboard or the **Delete** icon next to the saved search.

- A message appears asking to confirm the deletion. Click **Yes** to delete the search.

Creating Search Folders

Folders can be created to save any search you conducted for activities and cases. This search folders can be used as a quick reference, while searching for a particular activity or case.

To create folders under My Searches for Activities:

1. In the console sidebar, click **My Activity Search** button.
2. Click the **Add Folder** button in the Console toolbar. The New Search window opens.
3. Enter the Name and Description of the folder.
4. Enter the Search criteria for the folder from the Complex and Simple views.

   You can add **~~prompt** in the **Value** field, if you want to edit the value before you start a search. For more details, see "Running Simple Searches" on page 96 and "Running Complex Searches" on page 97.
5. Select the **Make this folder visible to all agents** checkbox if you want the folder to be visible to other agents.
6. Click **OK** to save the search folder.
7. In the console sidebar, hover your cursor on My Activity Search, select this saved search folder to start the search.

To create folders for Cases in My Searches:

1. In the console sidebar, click the **My Case Search** button.
2. Click the **Add Folder** button in the Console toolbar. The New Search window opens.
3. Enter the Name and Description of the folder.
4. Enter the Search criteria for the folder from the Complex and Simple views.

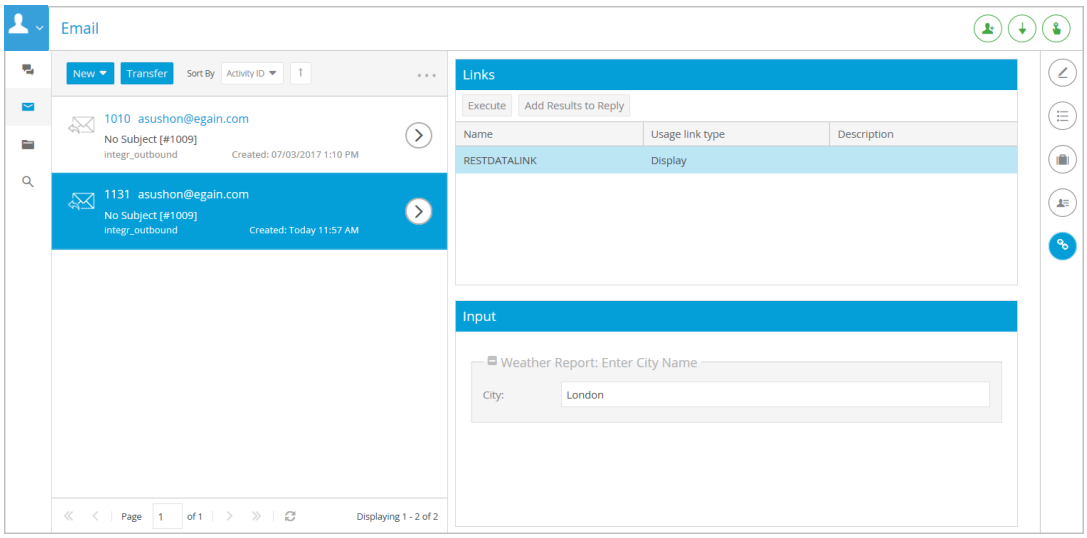
   You can add **~~prompt** in the **Value** field, if you want to edit the value before you start a search. For more details, see "Running Simple Searches" on page 96 and "Running Complex Searches" on page 97.
5. Select the **Make this folder visible to all agents** checkbox if you want the folder to be visible to other agents.
6. Click **OK** to save the search folder.
7. In the console sidebar, hover your cursor on My Case Search, select this saved search folder to start the search.

9 Data Links

- About Data Links
- Executing Data Links
- Adding Results to a Reply

About Data Links

Data links allow agents to access external resources and REST APIs to gather more information that may be pertinent to a customer inquiry. With this additional information at their disposal, agents are better equipped to handle activities.



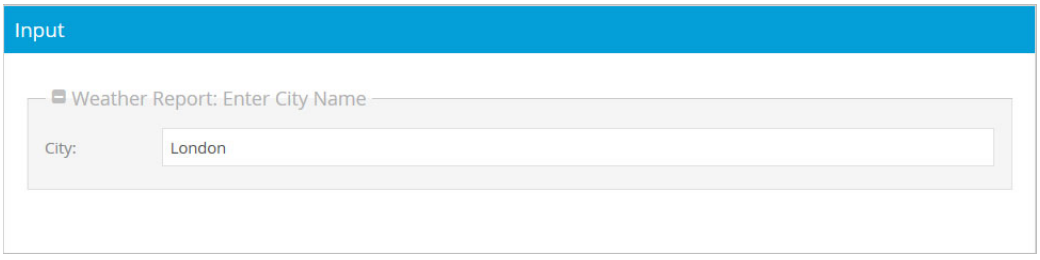
Data links are accessed from the Information bar

The types of data links that are available depend on how your deployment has been configured. Consult your administrator for more information.

Executing Data Links

To execute a data link:

1. While working on an activity, click the **Links** button in the information bar.
2. In the Links pane, select a data link from the list. The list displays the name, the link type, and a description of the link.
3. If the link has a variable that requires and input from you, enter the value in the Input field. For example, a weather report data link may require you to enter a city name for a more accurate result.



Provide the input value

4. With the desired link selected, click the **Execute** button.

Adding Results to a Reply

To add the results of a data link to a reply:

1. Execute a data link while working on an activity. For details, see "Executing Data Links" on page 101.
2. Click the **Add Results to Reply** button. The data link results are added to the reply pane of the chat or email.

10

Activity Monitors

- About Activity Monitors
- Reviewing Outbound Email Activities
- Monitoring Agent Chats
- Unblocking Blocked Chat Users

About Activity Monitors

While Supervision Monitors allows the supervisor to get an overview of the workload and service level adherence of various queues and users, Activity Monitors allow you to review on-going work of the agent. As the manager of a team, you have access to a read-only view of the inboxes of agents that report to you. You may also receive outgoing emails that need to be reviewed for quality.

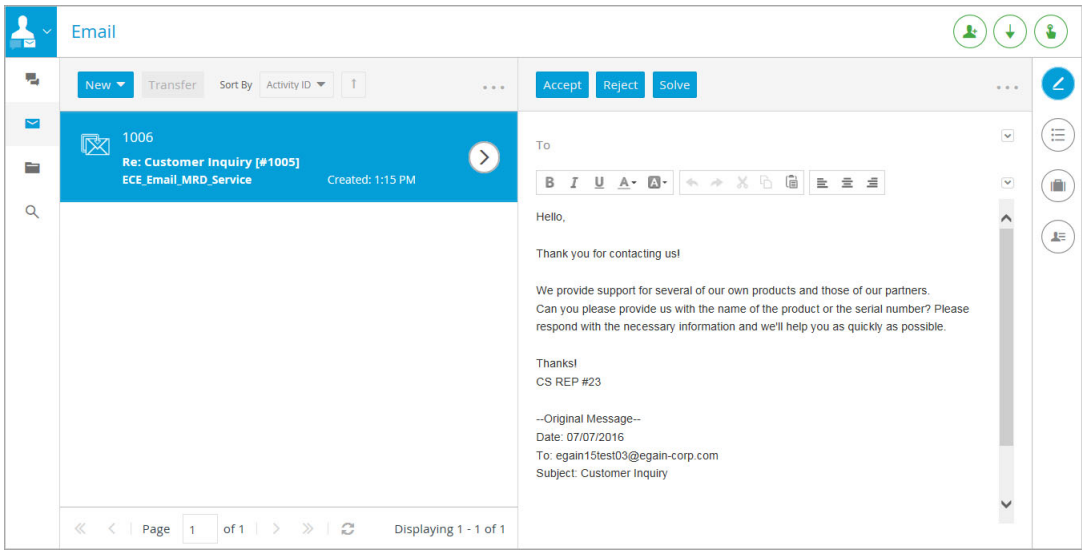
From the Activity Monitors, supervisors can also monitor chats as they come in to ensure that chats of higher priority are being handled by available agents quickly. Furthermore, if necessary, you may monitor chats and join the chat sessions of any agents that report to you.

Reviewing Outbound Email Activities

You may be a supervisor whose responsibilities include reviewing the content of outgoing emails. The system allows administrators to create an outbound workflow to facilitate this, in the form of a supervisory loop. Email activities can be processed through this outbound workflow before or after they are sent out of the system.

When an agent for whom this workflow has been configured clicks the **Send** or **Send and Complete** button, the reply, based on conditions, is sent to a queue from where you can pull the activity.

From the Agent Console, there are multiple options available, depending on how the administrator configured the outbound workflow. If the supervisory queue is configured to route the responses before the email is sent to the customer, you can **Accept** the reply, thus sending the email to the customer, or **Reject** it, returning it to the original agent for revision. Reviewers can edit replies, modify attachments and provide feedback to the agent as part of this process. If the queue is configured to route the responses after the email sent to the customer, you can mark it as Quality Met if the content of the response is satisfactory, or Quality Not Met if it is not. Typically, this method of review is used when SLAs have a higher priority than response content. Please note that the system records the SLA of an activity when the reply is dispatched. Thus, agents configured for supervisory loops can fail to meet an SLA if the supervisor does not verify their reply in a timely manner.



Review the response

Accepting Email Activities

To accept an activity:

1. Log in to the Agent Console via Finesse.
2. Pick or pull an activity for review from the Supervisory email queue.
3. Select the activity in the inbox.
4. In the Reply pane toolbar, click the **Accept** button.

   The reply is sent out of the system. Depending on the action performed by the initial agent (**Send** or **Send and Complete**), the activity may be completed when you accept the reply.

   As a supervisor of the activity, you can modify the text, or the attachments, and these changes are reflected in the reply that is sent to the customer. It is recommended that if you do make changes, you reject the reply and send it back to the agent for re-submission. This ensures that the agent receives appropriate feedback and is able to improve the quality of outgoing emails.

Rejecting Email Activities

To reject an activity:

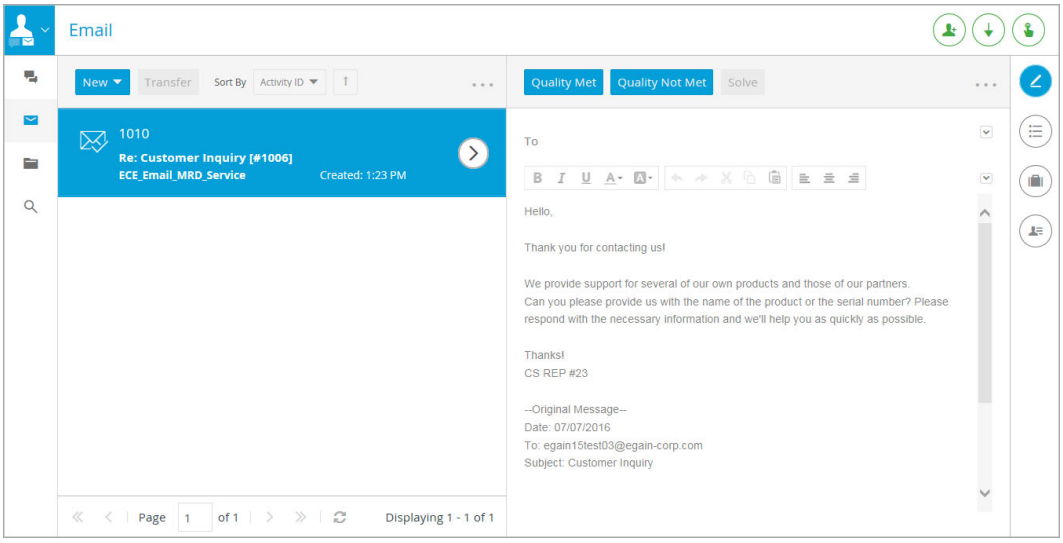
1. Select the activity in the inbox.
2. From the More Options menu in the Reply pane, select the **Notes** option to attach a note if required.
3. In the Reply pane toolbar, click the **Reject** button.

   The reply is not sent out of the system, and a new activity is sent back to the agent. The activity is tagged as a supervisory activity in the agent's inbox.

Marking the Quality of Emails

If the outbound workflow has been configured to route the activities to supervisor queues after a response has been sent, supervisors can review the emails and mark them as **Quality Met** or **Quality Not Met**. Reviewing

emails this way does not impact SLAs since the responses have already been sent by the time the activities appear in the supervisory queue.



Rate the quality of the response

To mark the quality of an activity:

1. Select the activity in the inbox.
2. From More Options menu in the Reply pane, select the **Notes** option to attach a note if required.
3. In the Reply pane toolbar, click the **Quality Met** button if the response is satisfactory, or **Quality Not Met** if it is not.

   Clicking the **Quality Met** button or **Quality Not Met** button completes the activity and the system identifies it as having been reviewed. The agent is not notified of any review performed on the activity.

Monitoring Agent Chats

Supervisors can monitor an agent's chat activities to provide additional assistance, review agent performance, or view the conversation in real-time. Conversations can be monitored from the Inbox in the Agent Console via the Monitors option. You can only monitor chats for agents or queues that you have been given permission to view.

To monitor an agent chat:

1. Log into the Agent Console for Finesse as a supervisor.
2. Hover over the Folders icon in the console sidebar and click the **Monitors** option. The Agent Console changes to display the Monitors area.
3. In the Inbox toolbar, click one of the filter options. Select if you want to filter by chat queue or by agent.
   - If you select the **Queue Filter** option, the Queue monitoring filter window opens. From here you can select the queue you want to monitor. Before selecting the queue you can view the number of activities in the queue that are unassigned, not started, and are in progress, as well as the priority of the queue.

Queue priority ranges from 1 (most urgent) to 9 (least urgent). You can also filter by the name of the queue. Multiple queues can be selected for monitoring.

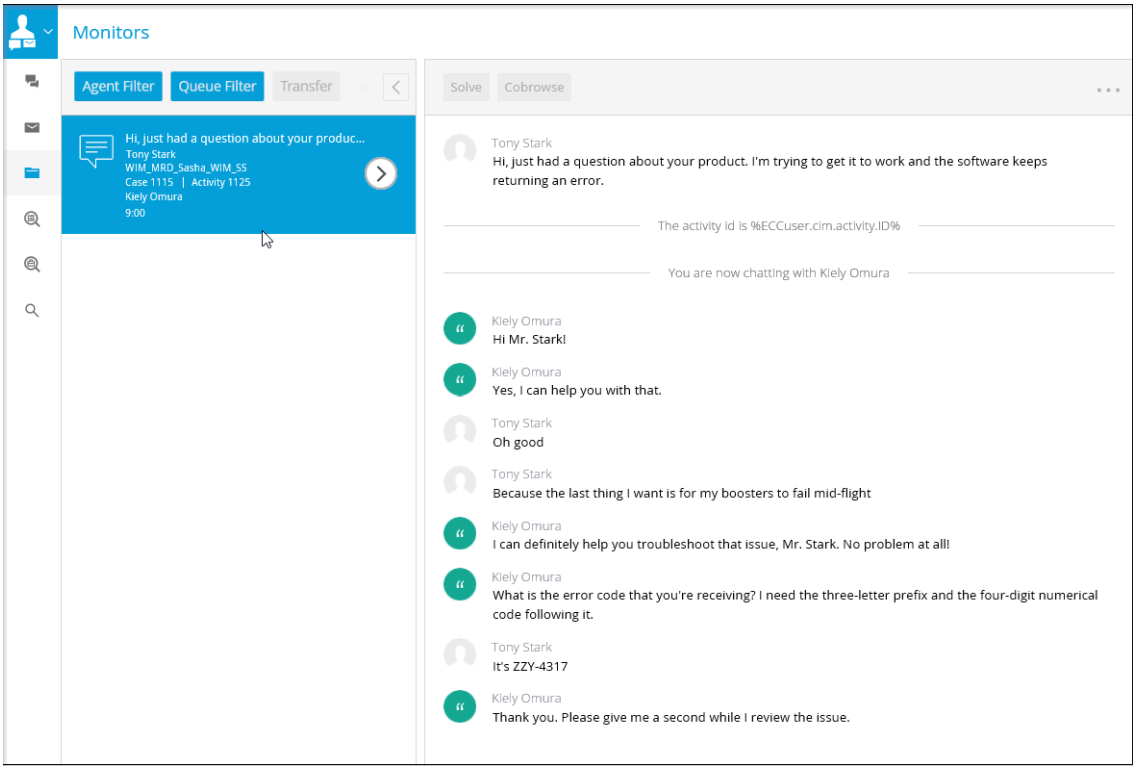
- If you select the **Agent Filter** option, the Agent monitoring filter window opens. From here you can select the agent that you want to monitor. Before selecting the agent, you can view the agent's screen name, the agent's chat availability, the number of chats in progress for that agent, and number of chats which have been assigned to that agent but not yet started. You can also filter by the User Name or Screen Name of a particular agent. Multiple agents can be selected for monitoring.

  Click the column headers to sort the results in ascending order or descending order, as well as remove any columns you don't want to use. Once a filter has been selected, the results are displayed in the Inbox. You can use the **Clear All** button to remove each selection across pages.

4. After selecting the desired queue or agent, click the **OK** button.
5. In the Inbox, select the activity you want to monitor. Active chats are displayed under the Monitors header with the chat feed itself being displayed on the right. The chat feed automatically updates every 30 seconds as new messages are added to it. You can change the rate at which the chat feed is updated by clicking the **User Options** button and then navigating to **Options > Settings > Monitoring**.

   The following information is displayed for each chat activity:

   - Customer name
   - Chat queue
   - Case ID number
   - Activity ID number
   - Agent name
   - Current duration of the chat



Monitoring an agent chat as a supervisor, showing the active chat in the Monitors area and the chat feed.

From here you can continue to monitor the chat, transfer it to another agent (page 88), or join the chat in progress and chatting with the customer and agent directly. You can still silently monitor chat activities without joining them, but if you wish to participate in an ongoing session, you can join the chat easily.

6. To join the chat, click the **More Options** button in the Chat pane and select the **Join** option.

Important: **When you join a chat, a system message is sent to the agent and the customer to inform them that you have joined.**

Once you join a chat, the **Join** option is removed from the **More Options** menu, the customer and agent are alerted to the fact that you have joined, and all other buttons in the Chat pane are enabled. You can then choose to send messages to everyone in the chat or messages to the agent that are not visible to the customer.

You can join a chat only after the agent to whom the chat is assigned has started chatting with the customer. You can also join chat sessions at the point at which the agent has left the chat session as long as the customer has not exited the chat. You can complete or leave chat activities. To rejoin a chat after leaving, click the **Join** option in the **More Options** menu again.

Unblocking Blocked Chat Users

If a customer has been blocked from the chat queue (page 89) by mistake, the block can be removed by the supervisor.

To unblock a chat user:

1. Log into the Agent Console as a supervisor.
2. Click the **User Options** icon and select **Blocked Visitors** from the dropdown menu. The Agent Console refreshes to show the Unblock screen.
3. Select the customer that you wish to unblock from the list and click the **Unblock** button.
4. The customer has now been removed from the Blocked Visitors list and can access the chat queue as normal. Note that no notification is sent to the customer informing them that they have been unblocked.

11 Supervision Monitors

- About Monitors
- Monitor Attributes
- Creating Monitors
- Starting Monitors
- Deleting Monitors

About Monitors

A monitor provides various perspectives on the information it tracks by presenting it in the form of tables, as well as pie and bar charts. For each business object, users and queues, you can select a number of attributes for monitoring. Monitors display real-time information, which is automatically refreshed every 30 seconds. Monitors created here can also be viewed from the Administration Console.

The monitors enable you to observe the functioning of three types of business objects in the system:

1. Queues
2. Users

While setting up a monitor users can:

- Configure it to run automatically, manually, or automatically whenever you are logged in to the system.
- Select the objects and their attributes that you want monitored.
- Create messages and alerts that are sent to specified recipients when certain conditions are met.

Monitor Attributes

Queue Attributes

You can monitor the following attributes of a queue.

General Attributes

- **Queue ID:** The unique ID assigned to the queue, usually a number.
- **Queue name:** Name of the queue.
- **Queue status:** Status of the queue. The status of the queue can be Active or Inactive.
- **Users - Number logged in:** Number of agents who are currently logged into the application and can be assigned activities from the queue. These are the agents who have pull permission on the queue and agents to whom email activities can be assigned or transferred from the queue.

Chat Activity Attributes

- **Chat - Current service level (%):** Number of serviced sessions currently in progress, which were picked up before the threshold setting configured for the department / Total number of serviced sessions currently in progress * 100.
- **Chat - Daily service level (%):** Chats answered before service level setting / sample set of chats completed on the day, till that point of time * 100.

- **Chat - Number in progress:** Number of chat activities assigned to agents and are being worked on (Status: Assigned- In Progress).
- **Chat - Number not started:** Number of chat activities assigned to agents, but on which work has not yet started (Status: Assigned - New).
- **Chat - Number of agents available:** Number of agents who are logged in and 'Available', who can either be assigned chat activities from the queue or can pull activities from the queue, and whose Chat - User max load setting is not exceeded.
- **Chat - Number unassigned:** Number of unassigned chat activities in the queue (Status: Assignment - Ready for Internal assignment).
- **Chat - Oldest in progress:** Age of the oldest chat activity in the queue - where the activity has been assigned and been worked upon (activity status 'Assigned-In Progress'). If your calender is set in business hours it does not effect this column.
- **Chat - Oldest unassigned:** Age of the oldest chat activity in the queue, where the activity has not been assigned (activity status 'Assignment-Ready for Internal assignment') If your calender is set in business hours it does not effect this column.
- **Chat - Oldest not started:** Age of the oldest chat activity in the queue, where the activity has been assigned but has not been worked on (Status: 'Assigned-New'). If your calender is set in business hours it does not effect this column.
- **Chat - Queue Priority:** The priority level of a queue. Activities that come in from high-level customers can be assigned to high-priority queues. The priority levels range from 1 to 9, with 1 being the most urgent level of priority, and 9 being the lowest level of priority.

Email Activity Attributes

- **Email - Number in progress:** Number of email activities assigned to agents and being worked on (Status: Assigned- In Progress).
- **Email - Number in wrapup:** Number of email activities assigned to agents and being wrapped up (Status: Assigned- Wrap Up).
- **Email - Number not started:** Number of email activities assigned to agents, but on which work has not yet started (Status: Assigned - New).
- **Email - Number unassigned:** Number of unassigned email activities in the queue. (Status: Assigned - Ready for Internal assignment)
- **Email - Oldest not started [hhh:mm]:** Age of the oldest email activity in the queue, where the activity has been assigned but has not been worked on (Status: Assigned - New). Age = Current date - created on date.

Important: Age is not calculated in business hours.

- **Email - Service Level:** This is calculated by using two configured items: sample size and response time limit. It indicates the percentage of emails for which response was sent before the time limit elapsed. (This does not include auto-acknowledgments).

Viewing Data As Bar And Pie Charts

Users can view information in the form of bar and pie charts.

The bar chart for queues is available only when one of the following attributes are selected (page 115) for monitoring:

- Queue name
- Users - Number logged in
- Email - Service level
- Email - Oldest not started

The pie charts for queues are available only when the following attributes are selected (page 115) for monitoring:

- Email - Number in progress
- Email - Number in wrap-up
- Email - Number unassigned
- Email - Number not started

User Attributes

You can monitor the following attributes of a user.

General Attributes

- **User name:** Name of the user.
- **User ID:** The unique ID assigned to the user, usually a number.
- **User status:** Status of the user, whether the user is logged in or not.
- **First Name:** First name of the user to be monitored.
- **Last Name:** Last name of the user to be monitored.
- **Screen Name:** Screen name of the user to be monitored.

Chat Activity Attributes

- **Chat - Available to handle:** Is the agent available to handle chats: **Yes** or **No**. If the value is No, the Not Ready code the agent selected for the reason why he is unavailable is displayed.

- **Chat - Number in progress:** Number of chat activities assigned to agent and being worked on (Status: 'Assigned - In Progress').
- **Chat - Number not started:** Number of chat activities assigned to agents, but on which work has not yet started (Status: ‘Assigned - New’).
- **Chat - Oldest in progress:** Age of the oldest open chat activity assigned to the agent and been worked upon (activity status 'Assigned-In Progress') If your calender is set in business hours it does not effect this column.
- **Chat - Oldest not started:** Age of the oldest open chat activity assigned to the agent but has not been worked on. (Status: 'Assigned-New') If your calender is set in business hours it does not effect this column.
- **Unavailable chat reason:** Reason for why the agent is unavailable for chat activities.

Email Activity Attributes

- **Email - Available to handle:** Is the agent available to handle emails: **Yes** or **No**. If the value is No, the Not Ready code the agent selected for the reason why he is unavailable is displayed.
- **Email - Number in progress:** Number of email activities assigned to this agent, which the agent is working on (Status: 'Assigned-In Progress').
- **Email - Number not started:** Number of email activities assigned to this agent, on which the agent has not yet started work (status: Assigned - New).
- **Email - Oldest in progress:** Age of the oldest email on which the agent is working (Status: Assigned-In Progress).
- **Email - Oldest not started:** Age of the oldest email on which the agent has not yet started work (Status: Assigned-New).
- **Unavailable email reason:** Reason for why the agent is unavailable for email activities.

Viewing Data As Bar Charts

The bar chart for users is available only when one of the following attributes are selected (page 115) for monitoring:

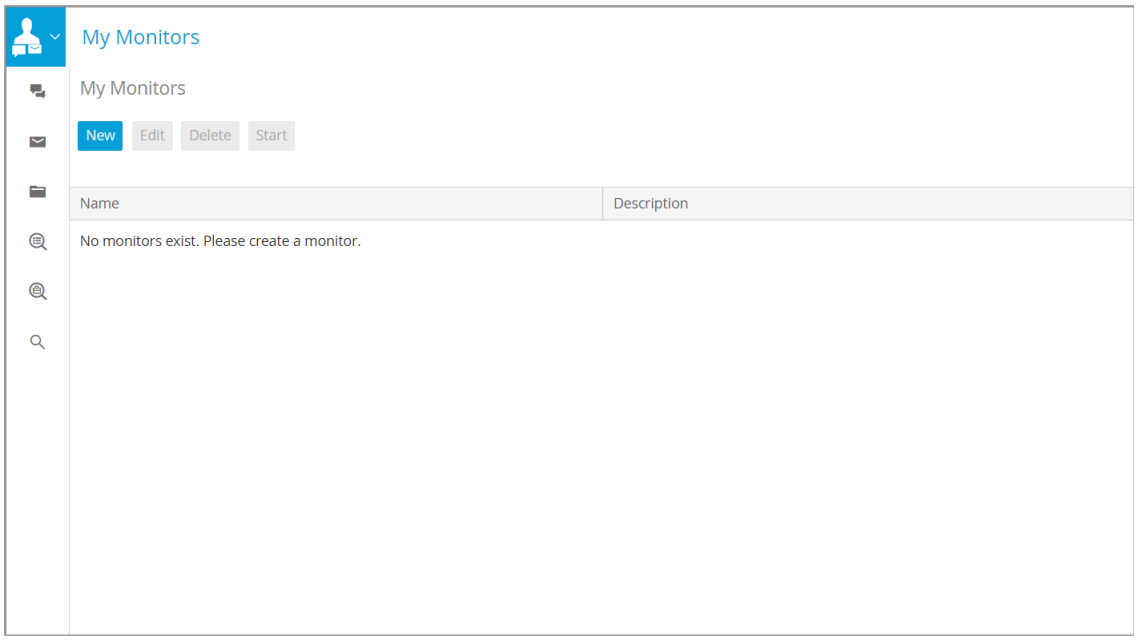
- User name
- Email - Available to handle
- Email - Number in progress
- Email - Number not started

Note: Pie charts are available only for monitoring Queue attributes.

Creating Monitors

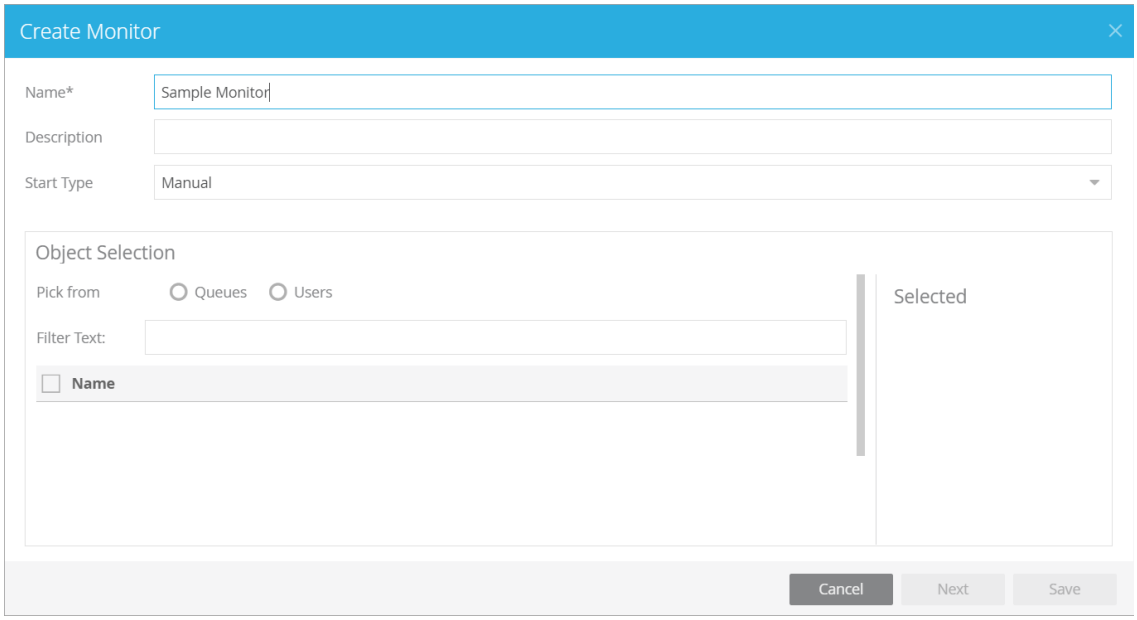
To create a monitor:

1. In the Console toolbar, click the **User Options** button.
2. From the dropdown, select the **My Monitors** option.
3. When the window refreshes to My Monitors, click the **New** button. The Create Monitor window opens up.



My Monitors window

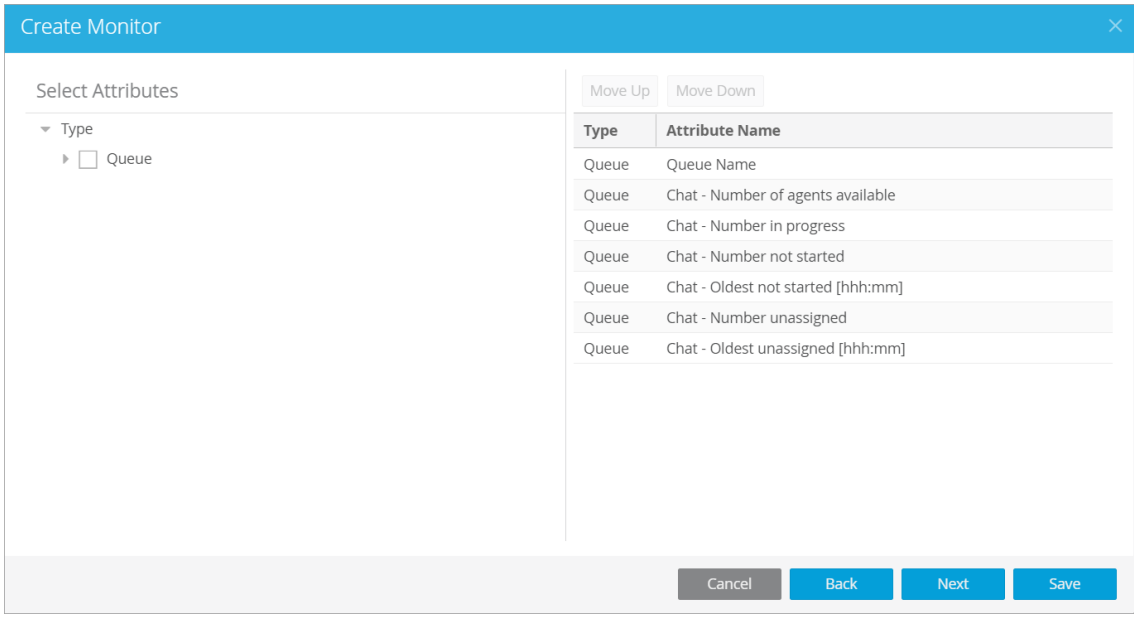
4. On the Create Monitor window, provide the following details.
   - **Name:** Type a name for the monitor. This is required information.
   - **Description:** Provide a brief description.
   - **Start type:** From the drop down list, select a start type for the monitor from the following options:
     - **Automatic:** The monitor runs automatically and if notification conditions are met, it sends alerts automatically at a fixed time interval, irrespective of whether the user who created the monitor is logged in or not.
     - **Manual:** The monitor has to be started manually by the user who created the monitor.
     - **On login:** The monitor starts automatically, once the user who created the monitor logs in. And if the notification conditions configured for the monitor are met, the alerts are sent automatically.
   - **Object Selection** section: Select objects to be monitored. Select from users and queues. Click the checkbox to make the selection. Once you are done selecting, click the **Next** button.



Create Monitor window

Important: The Next button is enabled only after you provide the name for the monitor and select the objects to be monitored.

5. On the next page, in the Select Attributes section, select the attributes of the Users and Queues to be monitored. For more details, see "Monitor Attributes" on page 110. Click the **Next** button.



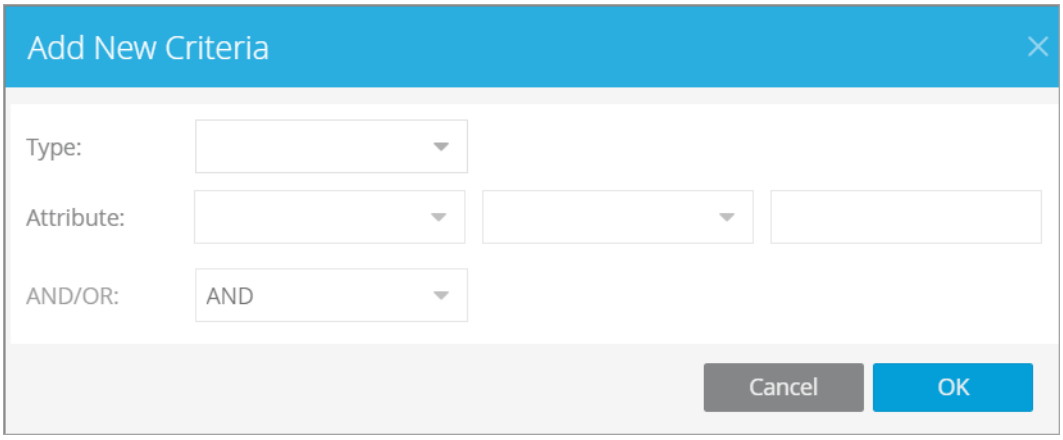
Select attributes to monitor

Important: Some attributes are selected by default. They can be removed from the list if required.

6. On the next page, perform the following:
   - In the Notification section, set the following:
     - **Enable Notification:** Click the checkbox to enable notifications
     - **Notification Frequency (Minutes):** Specify the time interval at which notifications should be sent when a condition specified in the monitor is met. The default value is set to 30 minutes.

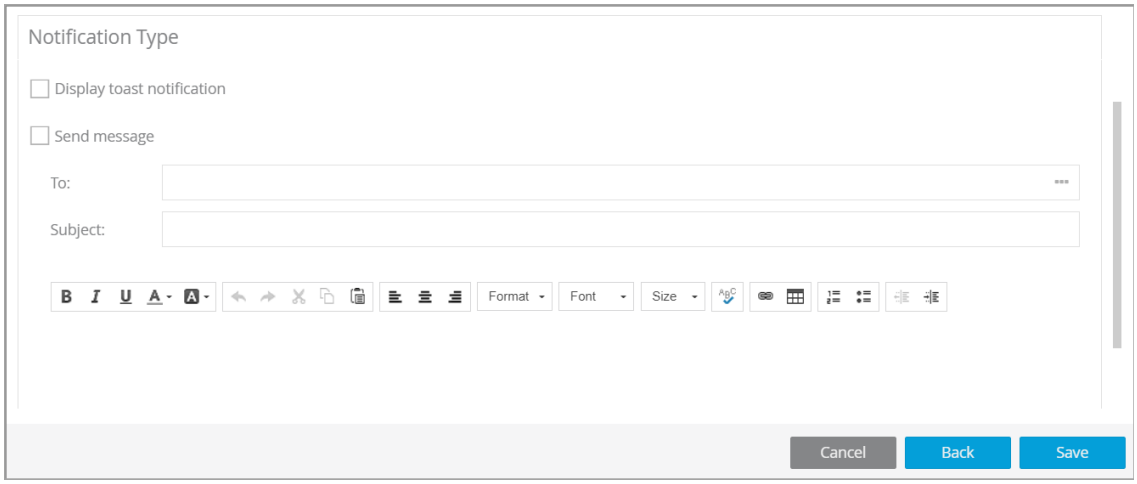
Enable notifications

   - In the Conditions section, set the conditions for sending notifications.
     i. Click the **Add New Criteria** button.
     ii. In the **Add New Criteria** window, specify conditions for raising alerts and sending notifications. Only objects and attributes that you have selected are displayed in the **Type** and **Attribute** field. Once you specify the condition, the Notification Type section is enabled.



Set conditions for sending notifications

- In the Notification Type section, perform the following:
  - Select the **Display toast notification** checkbox to configure the alert to be presented as a pop-up box on the monitor when an alert condition is met.
  - Select the **Send message** checkbox and set up internal messages or emails to be sent when an alert condition is met. Specify to whom you want to send the notifications, subject of the message and content of the message. You can send notifications to internal users and to external email addresses.



Set notification type and create a custom message

Important: It is always a good practice to enable notification for monitors. However, you can create and save a monitor without setting it up.

7. Click the **Save** button.

Starting Monitors

You can configure the monitor to keep running automatically all the time, or you can configure them to run automatically every time you log in to the application. If you do not want to run the monitors automatically, start them manually whenever you need them.

To start a monitor:

1. In the Console toolbar, go to the **User Options** button.
2. From the dropdown, select the **My Monitors** option. The window refreshes to **My Monitors**.
3. In the My Monitors window, select the monitor you want to start.
4. Click the **Start** button. The window refreshes.

   The monitor appears in a new window. View the information in table or chart format or both. The display is refreshed after every 30 seconds.

Deleting Monitors

Delete the monitor if you do not want to use it any more.

To delete a monitor:

1. In the Console toolbar, go to the **User Options** button.
2. From the dropdown, select the **My Monitors** option. The window refreshes to **My Monitors**.
3. In the My Monitors window, select the monitor you want to delete.
4. Click the **Delete** button.