Cisco Unified Web and E-Mail Interaction Manager Agent Console User's Guide

For Unified Contact Center Express

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Contents

Preface

Welcome to Cisco® Unified Web and E-mail Interaction Manager™, multichannel interaction software used by businesses all over the world to build and sustain customer relationships. A unified suite of the industry's best applications for web and email interaction management, Cisco Unified Web and E-Mail Interaction Manager is the backbone of many innovative contact center and customer service helpdesk organizations.

About this guide

Cisco Unified Web and E-Mail Interaction Manager Agent Console User's Guide introduces you to the Agent Console and helps you understand how to use it to handle customer queries and related tasks.

This guide is for installations that are integrated with Cisco Unified Contact Center Express (Unified CCX).

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`	A file name or command. Or, text that must be typed by the user.
Variable	User-specific text, provided by the user.

Document conventions

Other learning resources

Various learning tools are available within the product, as well as on the product CD and our web site. You can also request formal end-user or technical training.

Online help

The product includes topic-based as well as context-sensitive help.

Use	To view
Help button	Topics in *Cisco Unified Web and E-Mail Interaction Manager Help*; the Help button appears in the console toolbar on every screen.
F1 keypad button	Context-sensitive information about the item selected on the screen.

Online help options

Document set

The Cisco Unified Web and E-Mail Interaction Manager documentation is available in the `Documents` folder on the product CD. It includes the following documents:

- *Cisco Unified Web and E-Mail Interaction Manager Release Notes*
- *Cisco Unified Web and E-Mail Interaction Manager System Requirements*
- *Cisco Unified Web and E-Mail Interaction Manager Solutions Reference Network Design Guide*
- *Cisco Unified Web and E-Mail Interaction Manager Browser Settings Guide*
- *Cisco Unified Web and E-Mail Interaction Manager Administration Console User's Guide*
- *Cisco Unified Web and E-Mail Interaction Manager Agent Console User's Guide*
- *Cisco Unified Web and E-Mail Interaction Manager Knowledge Base Console User's Guide*
- *Cisco Unified Web and E-Mail Interaction Manager Reports Console User's Guide*
- *Cisco Unified Web and E-Mail Interaction Manager Supervision Console User's Guide*
- *Cisco Unified Web and E-Mail Interaction Manager System Console User's Guide*
- *Cisco Unified Web and E-Mail Interaction Manager Tools Console User's Guide*

1 Preferences and settings

Most settings are configured by administrators for the entire partition or department. The administrator can allow users to configure certain settings as individual preferences.

About preferences

By using this option, you can change your password, settings, personal dictionary, and pull preferences for activities.

Things to note

- Any preferences that are changed take effect with the next login. If you want the changed preferences to take effect immediately, then log off and log in again.

Changing settings

If you have the permissions, you can change the following settings of your inbox.

1. **Chat - Inbox sort column:** With this setting you can define the column on which the list in your chat inbox will be sorted. This setting will not impact the sorting in My Searches or My Monitor folders. The options available are – Shortcut key (default value), Activity ID, Case ID, When Created, Customer name, Subject, Activity sub status, Queue name.

> **Important:** If you specify a column that is not part of the agent's inbox list or if there is a tie between two activities with the same value for the sorting column, the inbox will then be sorted by the shortcut key.

2. **Chat - Inbox sort order:** This setting is related to the chat inbox sort column setting. This setting enables you to define the sort order of the list in the chat inbox. This setting will not impact the sorting in My Searches and My Monitor folders. The options available are – Ascending and Descending (default value).
3. **Inbox sort column:** With this setting you can define the column on which the list in your Activity and Case folder will be sorted by default. This setting will not impact the sorting in My Searches folder. The options available are – Activity ID (default value), Activity Priority, Case id, Contact point, Department name, Subject, When created, Activity type, Activity sub status.
4. **Inbox sort order:** This setting is related to the Inbox sort column setting. This setting enables you to define the sort order of the list in the Activities and Case

folders in your inbox. This setting will not impact the sorting in My Searches folder. The options available are – Ascending and Descending (default value).

5. **Mail user max load:** The number of activities, of the type Mail, that a user can work upon is limited. Hence, the system should check the current load of the user before assigning more emails. Through the Mail user max load setting you can set the maximum number of email activities that a user can be assigned. This setting is used by workflow to identify whether an activity can be assigned to a user. This setting will not be checked when the user pulls activities from queues or other users. It will be checked when other users transfer activities to this user. All open mails in the user's inbox will qualify for this setting. It can take any value. The default value is -1. A value of –1 denotes that infinite number of mails can be assigned.
6. **Max load for all other activities:** The number of activities, of the type other than Mail, that a user can work upon is limited. Hence the system should check the current load of the user before assigning more activities. Through the Max load for all other activities setting you can set the maximum number of activities (of type other than Mail) that a user can be assigned. This setting is used by workflow to identify whether an activity can be assigned to a user. This setting will not be checked when the user pulls activities or other users transfer activities to this user. It can take any value. The default value is -1. A value of –1 denotes that infinite number of activities can be assigned.
7. **Number of activities per page:** The number of activities that can be displayed on the UI at a time is based on a pagination model. The model will display the number of activities based on a formula. If you wish to see more number of activities then the model will make a call to the database to display the data. With this setting, you can decide the number of activities to be displayed in one page. It is to be noted that two other settings Inbox sort column and Inbox sort order also influence the activities that will be displayed. The default value is 20.
8. **Show current folder** You can auto select the current folder in the inbox. So that when logged in, you will view the Current folder and all its activities. The options available are:
   - Yes – When the user logs in the Current folder in the Inbox tree is selected automatically (default value).
   - No – When the user logs in none of the folders will be selected.
9. **Activity type for autopushback:** You can define the activities which you want to be pushed back from your inbox when you log out. The options available are:
   - None – No activities will be pushed back to the queues.
   - New activities only – Only Activities with sub-status New will be pushed back to the queues (default value).
   - Both new and incomplete activities – All the activities will be pushed back to the queues.

10. **Expiry time for autopushback (minutes):** You can define a time after which activities will be pushed back from your inbox to queues. Till this time is expired the activities will remain in your inbox even though you have logged out. The value for this setting is in minutes. The default value is 30.
11. **Notification for new activity:** You can define through this setting the times or scenarios when email notifications should be sent, each time an activity is assigned to you. The options available are:
    - Never – Email notification will not be sent (default value).
    - When Logged In – Email notification will be sent to the user's email ID when the user has logged into the application.
    - When not Logged in - Email notification will be sent to the user's mailid when the user has not logged into the application.
    - Always – Email notification will be sent to the user's mailid always, i.e. logged-in or not logged-in.
12. **Agent inbox preference:** This setting decides whether the chat inbox or the email inbox is to be displayed when you log in the Agent console. The options available are – Chat (default value) and Emal.
13. **Customer history view:** This setting allows you to decide the format in which you want to view the customer history. The options available are – Snapshot View (default value) and Tree View.
14. **Section to maximize in agent console:** It is possible to set a section to be maximized when you log in to the Agent Console. Currently only the Knowledge Base section can be set to be maximized. The options available are:
    - None – When the user logs in then the panes in the console will be set to the size that they had been when the user last logged off (default value).
    - Knowledge – When the user logs in then the Knowledge Base section will be maximized and the Reply pane will be minimized. The other two panes – Tree and List will remain at the same size that they had been when the user last logged off.
15. **Refresh interval (seconds):** The monitor windows in the supervision console have to be refreshed periodically to update them with real time data from the monitor tables. With this setting, you can define the time for the monitoring windows to be refreshed automatically. This setting takes values in seconds. The default value is 30.
16. **Auto blockcheck:** With this setting you can choose to let the spell checker automatically check for blocked words. The blocked words can be configured through the Administrator console under the Dictionaries node or through the Personal Dictionary preferences for a user. When the spell checker encounters blocked words in the mail it will not send the mail till the blocked words have been deleted or modified. Since the Auto block check works through the Auto spell check, enabling the Auto block check or Auto spell check the automatic

spell checker screen will be invoked. The options available are – Enable (default value) and Disable.

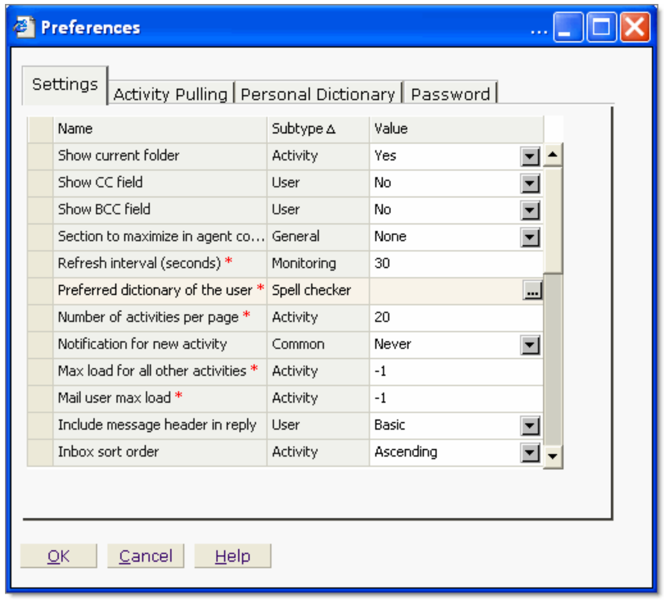
17. **Auto spellcheck:** You can choose to enable automatic spellcheck, in this setting. If enabled the spellcheck will be invoked when the Send button is clicked on the Agent Reply pane. The Auto block check, explained in a later setting, too will invoke the automatic spell checker. The options available are – Disable (default value) and Enable.
18. **Ignore web addresses and file names:** This settings helps you to enable the spell checker to ignore internet addresses and file names. The options available are:
    - Yes – the words will be ignored.
    - No – the words will NOT be ignored and will be displayed in the spelling checker with options for change (default value).
19. **Ignore words in caps:** With this setting, you can choose to let the spell checker ignore words in caps. The options available are:
    - Yes – the words will be ignored.
    - No – the words will not be ignored and will be displayed in the spelling checker with options for change (default value).
20. **Ignore words with digits mixed:** This setting allows you to let the spell checker ignore words that have mixed digits. For instance, name123@yahoo.com. The options available are:
    - Yes – the words will be ignored.
    - No – the words will NOT be ignored and will be displayed in the spelling checker with options for change (default value).
21. **Ignore words with numbers:** With this setting, you can choose to let the spell checker ignore words with numbers. The options available are:
    - Yes – the words will be ignored.
    - No – the words will NOT be ignored and will be displayed in the spelling checker with options for change (default value).
22. **Ignore words with unusual mixtures:** With this setting, you can choose to let the spell checker ignore words with unusual mixture of upper and lower case letters. For instance, myFirstWord. The options available are:
    - Yes – the words will be ignored.
    - No – the words will NOT be ignored and will be displayed in the spelling checker with options for change (default value).
23. **Preferred dictionary of the user:** With this setting, you can choose the dictionary for the spell checker to consider. The options available are - English (US) Dictionary, English (UK) Dictionary, German Dictionary, Spanish Dictionary, French Dictionary, Portuguese Dictionary, Dutch Dictionary, Italian

Dictionary, Norwegian (Bokmaal) Dictionary, Finnish Dictionary, Swedish Dictionary, Danish Dictionary.

24. **Default editor:** In this setting, you can choose the default editor for all your composed replies. The options available are – HTML editor and Plain text editor (default value).
25. **Include message header in reply:** An email contains header information that details the Sender's email address, Subject, Time of sending the mail, machine name, protocol type, client name etc. of the mail. Most of the header information is not of use to the agent. Thus it can be hidden in the Reply pane. With this setting, you can define the amount of header information that should be displayed in the Reply pane of the user. The options available are:
    - None – no header information will be displayed.
    - Basic – basic header information will be displayed. This information is of use to the agent (default value).
    - Complete – complete header information will be displayed in the Reply pane.
26. **Show BCC fields:** With this setting, you can select to view the bcc field in the Reply pane. The options available are – Yes and No (default value).
27. **Show CC field:** With this setting, you can select to view the cc field in the Reply pane. The options available are – Yes and No (default value).

To change the settings

1. In the Agent Console toolbar, click the **Preferences** button.
2. In the **Preferences** window, go to the **Settings** tab, and change the settings.



Configure the settings

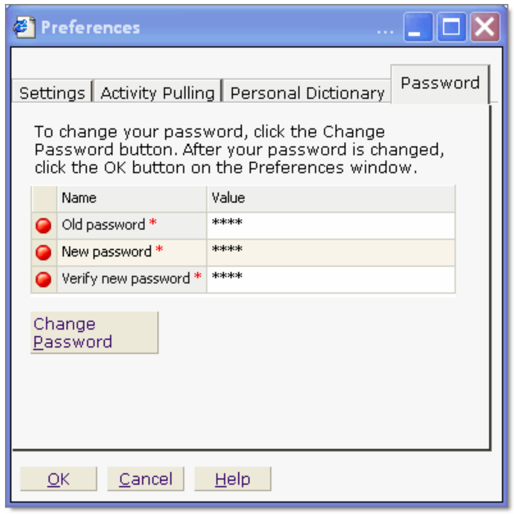
3. After changing the settings, click the **OK** button.

Changing your password

To change your password

1. In the Agent Console toolbar, click the **Preferences**  button.
2. In the **Preferences** window, go to the **Password** tab.

3. On the **Password** tab, first provide the old password. Then, provide the new password and verify the new password. Click the **Change Password** button.



Change your password

Updating your personal dictionary

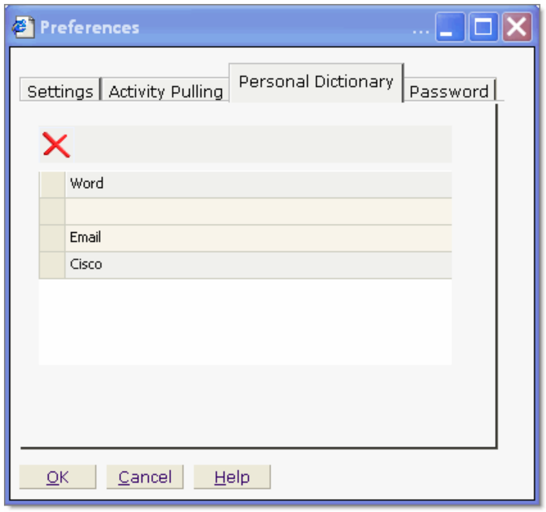
You can add words to your personal dictionary. There can be some words which are used in your organization that are not part of the regular dictionary. You can add such words to your personal dictionary, so that every time you run the spell-checker these words are ignored by the spell-checker.

Adding words to your personal dictionary

To add words to your personal dictionary

1. In the Agent Console toolbar, click the **Preferences** button.
2. In the **Preferences** window, go to the **Personal Dictionary** tab.

3. On the **Personal Dictionary** tab, type the word you want to add to your personal dictionary and press ENTER.



Add words to the personal dictionary

4. click the **OK** button.

Deleting words from your personal dictionary

To delete words from your personal dictionary

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

Changing your preferences for pulling activities

You can pull activities from queues according to the preferences set. You can specify from which queues to pull the activities, which activities to pull and how many activities to pull at a time.

In the activities to pull first, there are five options available:

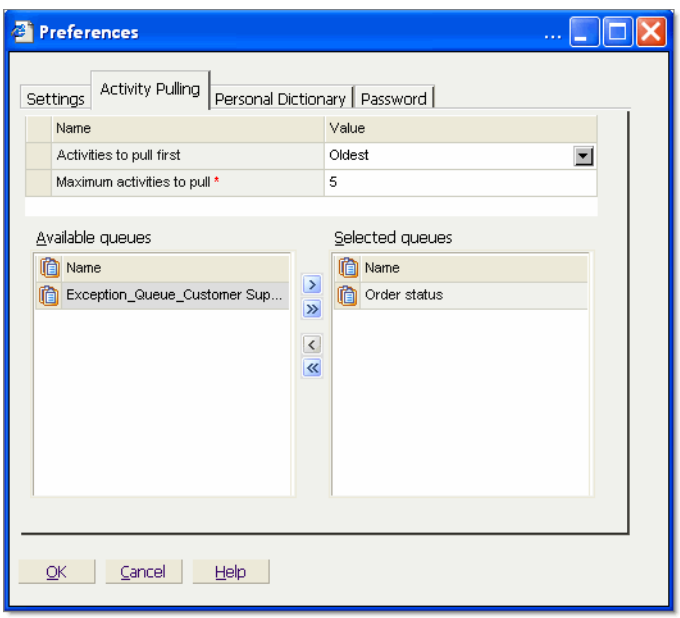
- **Due latest:** The activities that are late and are already overdue.
- **Due soonest**

- **Highest priority**
- **Newest**
- **Oldest**

Important: You can change your preferences for pulling activities only if you have the permission to change your preferences.

To set your preferences for pulling activities

1. In the Agent Console toolbar, click the **Preferences** button.
2. In the **Preferences** window, go to the **Activity Pulling** tab and provide the following details.
   - **Activity to pull first:** From the dropdown list select the type of activities that you want to pull. The options available are due latest, due soonest, highest priority, newest, and oldest.
   - **Maximum activities to pull:** Specify the number of activities you want to pull each time you click the **Pull Next** button.
   - From the list of queues select the queues from which you want to pull the activities.



Set preferences for pulling activities

3. Click the **OK** button.

2 Basic tasks

Managing your availability

If you are working on some activity and you think that you won't be able to handle any other incoming activities at that time, you can change your availability settings. This ensures that no new activities are assigned to you by the system, and if anyone is transferring an activity to you they will know that at present you are unavailable to handle the activity. This makes sure that if an activity needs immediate handling, it is not transferred to an unavailable agent. You can change your availability setting for all activities or individually for different types of activities.

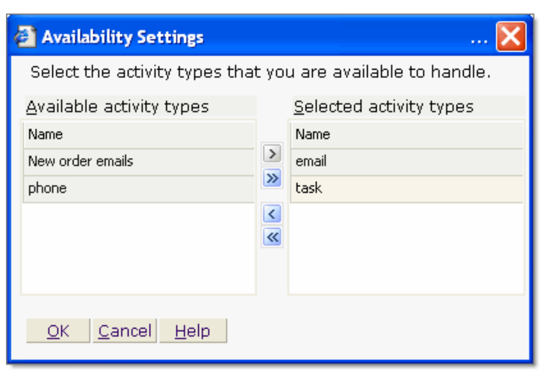
You can change your availability settings in two ways:

- If you want to change the settings for individual types of activities, use the **Availability settings** button. For example: You want to show yourself as available for email activity type and unavailable for phone activity type, you can use this option.
- If you are busy with some critical activity and can't handle any other activity for some time you can change your availability setting by using the available option on the inbox list pane toolbar. This is useful when you have to make yourself unavailable for a short time.

Configuring the availability setting

To configure your availability setting

1. Go to your main inbox.
2. In the Inbox pane toolbar, click the **Availability settings** button.
3. In the Availability Settings window, select the activities types for which you want to make yourself available. Click the **OK** button.



Configure your availability setting

Making yourself available

In the main inbox

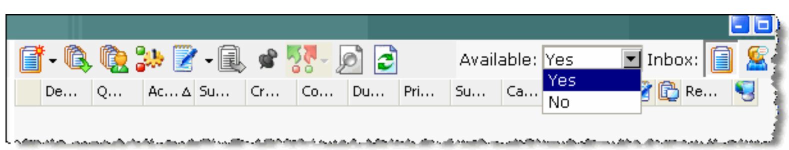
To make yourself available in the main inbox

1. Go to your main inbox.
2. In the Inbox pane toolbar, in the **Available** box select **Yes** to make yourself available for handling activities.
   - When you change the setting to **Yes** it will restore your settings set using the **Availability setting** option.
   - When you change your availability setting to **No** it will ignore your settings set by using the **Availability setting** option and will show you unavailable for all activities and tasks.

   For Example: Using your availability settings you have set your self available for email type activities.

   - When you change your **Available** option to **No**, it will ignore your settings set for individual activity types and you will be shown unavailable for all types of activities.
   - When you change your **Available** option to **Yes**, your availability setting will be restored i.e. you will be shown available for email type of activity only and not for other types of activities.

Important: When you login the agent console, you are logged in with the same availability settings you were working with at the time of log out.



Make yourself available in the main inbox

About pulling activities

Activities can be pulled in three ways:

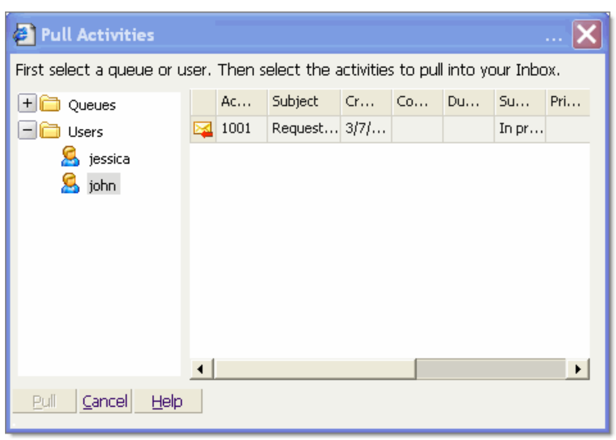
- You can pull selective activities from users and queues.
- You can set your pull preferences for queues, and every time you click the **Pull next** button the activities will get assigned to you based on your set preferences. To set your pull preferences, see the section on page 18.
- You can also search for specific activities and pull them from the search console.

Things to note

1. You have the ability to pull activities only if the Pull Activities action is assigned to you.
2. You can pull activities from the queues and users for which you have pull permission.
3. Activities that are locked or pinned by other users can’t be pulled. However, if you have the Unpin action assigned, you can pull the activities pinned by other users.

To pull selected activities from users or queues

1. In the Inbox pane toolbar, click the **Pull activities** button.
2. In the Pull Activities window, do the following.
   - Select the queue or user from whom you want to pull the activities.
   - From the list of activities, select the activities you want to pull and click the **Pull** button. The activities get assigned to you.



Pull activities from users and queues

To pull activities using preference settings

> **Important:** Make sure you set your pull preferences first before pulling the activities.

3. In the Inbox pane toolbar click the **Pull next** button.
4. According to the pulling preferences set, the activities are pulled and assigned to you. If there are no activities that meet the pull criteria you are notified that no activities were pulled.

To pull a specific activity

1. Go to the Search Console and search for the activity.
2. From the Results pane select the activity and click the **Pull** button. The activity gets assigned to you.

About pinning activities

Activities can be pinned to indicate that you wish to work on a particular activity and don't want it to get pushed back automatically to the queues, or pulled by other users. You can pin activities only if you have the Pin action assigned.

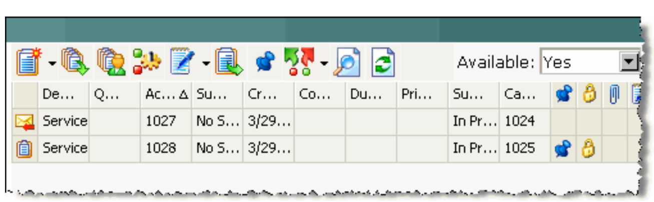
> **Important:** A pinned activity can be pulled by users who have Unpin action assigned to them.

Pinning activities

To pin an activity

1. In the Inbox pane, select the activity you want to pin.
2. In the Inbox pane toolbar, click the toggle **Pin** button.

   A **Pin** icon appears in the Inbox List pane indicating that the activity is pinned.



A sample pinned activity

Unpinning activities

To unpin an activity

1. Select the pinned activity from the Inbox pane.
2. In the Inbox pane toolbar, click the toggle **Pin** button. The activity is unpinned.

Transferring activities

Activities can be transferred to agents, queues, or departments. Before transferring the activities you can check the email load on the queue. For users, you can check if they are logged in and available to handle emails and tasks, and how many emails and tasks they have in their inbox.

While transferring activities, you can change their priority and add notes to them. When an activity is transferred from one user to another, the owner of the case doesn't change.

Important: You can transfer activities only if you have the transfer action. And you can transfer activities to only those queues, users, or departments for which you have transfer permissions.

You can transfer activities to:

- Departments
- Queues
- Users

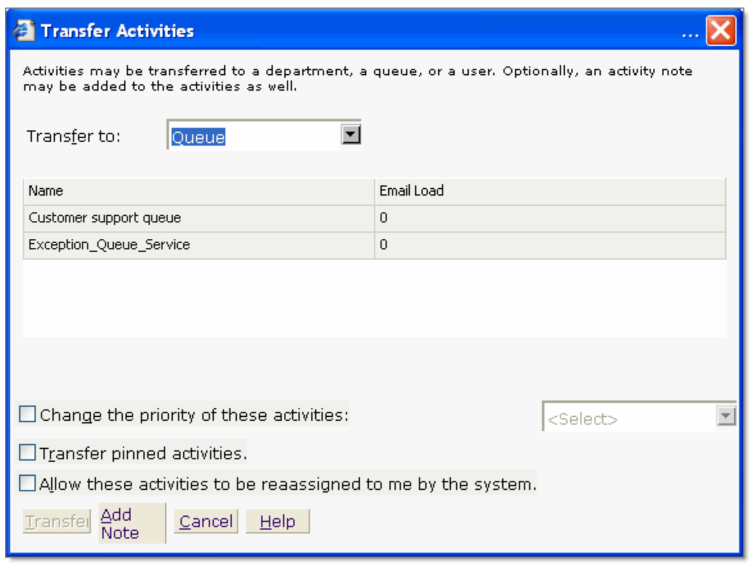
Transferring activities

To transfer an activity

1. In the inbox select the activity you want to transfer.
2. In the Reply pane or Inbox pane toolbar, click the **Transfer** button.
3. In the **Transfer Activities** windows, select if you want to transfer the activity to another agent, queue, or a department. From the list of available agents, queues, or departments select the one to which you want to transfer the activity.

Before transferring the activity you can change the priority of the activity and can add notes to the activity.

4. To change the priority of the activity select the **Change the priority of these activities** option, and from the dropdown list select the priority.
5. If you are transferring a pinned activity, then select the **Transfer pinned activities** option to unpin the activity before transferring.
6. If you don't want the activity to be re-assigned to you by the system, then clear the **Allow these activities to be re-assigned to me by the system** option.
7. Lastly, if you want to add a note to the activity, click the **Add Notes** button and in the **A**dd Note window that appears add the note and click the **OK** button.
8. Click the **Transfer** button to transfer the activity.



Transfer activities to users, queues, or departments

Managing new activities notifications

When you are logged in the application and working on another activity, a message is shown to notify that a new activity has been assigned to you. Choose to view the new activity or select to view it at a later time.

To manage new activities notifications

- When a new message appears notifying that a new activity has been assigned:
  - Click the **Now** button to view the activity. The new activity is selected in the List pane and you can view its details. If you have any unsaved content

in the activity you were working on earlier, you are notified to save the changes.

- Click the **Later** button, to continue working on the current activity.

3

Search for information

The easiest way to locate an item such as activities, cases, customers, and knowledge base articles is to search it. In this chapter, we look at different ways in which you could search for information in the Agent Console.

About searches

Search is a very useful feature in the Agent Console. Use this feature to search for customers, cases, and activities.

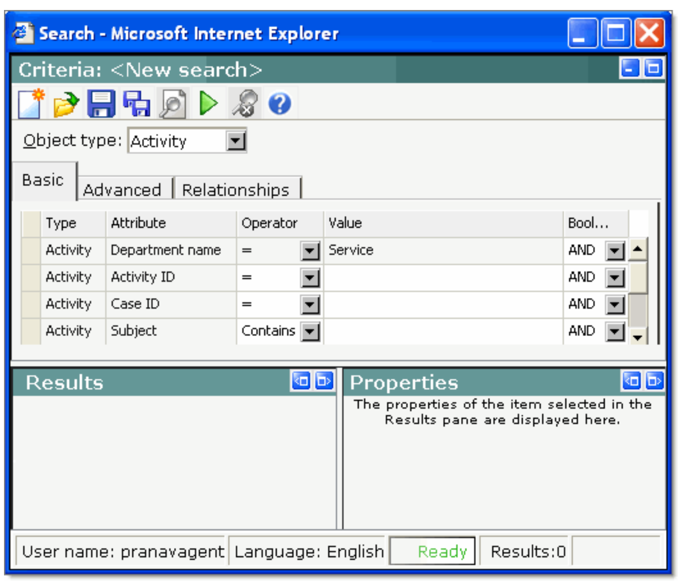
Creating searches

By default one global search is created in the system, and it can’t be deleted. In addition to it, you can create more searches.

Creating searches

To create a search

1. In the Agent Console toolbar, click the **Search**  button.



Create a new search

2. In the Search window, go to the Criteria pane toolbar and click the **New** button.

3. From the **Object type** list select the object you want to search.

   The Criteria pane refreshes to display a list of attributes available for search.

4. Now, in the Basic tab specify the search criteria.
5. Next, go to the Advanced tab and specify additional search criteria options.

   Advanced search narrows down the scope of search and you get only the most relevant results.

6. Lastly, go to the Relationships tab and defining the criteria that are related to classifications and attachments.

   This further narrows down the scope of search.

7. Click the **Run** button to run the search.

   You can view the results of the search in the Results pane. From the Results pane you can export search results, locate activities, cases, and customers in the Agent Console.

Deleting searches

If you want you can delete the searches.

To delete a search

1. Select the search in the Open Search, or Save Search, or Save Search As window.
2. Press the **Delete** key on the keyboard.
3. A message appears asking to confirm the deletion. Click **Yes** to delete the search.

Saving searches

You can save the search criteria that you use most commonly. This helps you save time, as you can open the saved searches and run them quickly.

To save a search

1. First, create a search.
2. To save the search, click the **Save** button in the Search window toolbar.
3. In the Save Search window, provide the following details.

- **Search name**: Type a name for the search. Use a name that adequately represents the search attributes.
- **Search type:** Select the type of search from the dropdown list. There are two options available.
  - **Global Searches:** A global search is available to all the users.
  - **Personal Searches:** A personal search is available only to the user who creates it.
- Click the **Save** button to save the search criteria.

Running saved searches

You can access saved searches anytime, by locating and opening them.

To open a saved search

1. In the Agent Console toolbar, click the **Search** button.
2. In the Search window toolbar, click the **Open** button.
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 run the search.
4. Click the **Run** button to run the search.

Stopping searches

You may want to stop a running search for multiple reasons such as to edit search parameters, limit search results, and so on.

To stop a search

- In the Search window toolbar, click the **Stop** button.

Creating a search from saved searches

You can also create new searches from already saved searches. For example, you have a saved search and you make changes to it. Now you want to keep the old search, and also want to save the new one. Or, if there is a search saved as a global search and you want to save it as personal search or vice versa.

To create a search from a saved search

1. First, open a saved search.
2. Click the **Save as** button in the Search window toolbar.
3. In the Save Search As window, provide the following details.
   - **Search name**: Type a name for the search. Use a name that adequately represents the search attributes.
   - **Search type**: Select the type of search from the dropdown list. There are two options available.
     - **Global Searches**: A global search is available to all the users.
     - **Personal Searches**: A personal search is available only to the user who creates it.
   - Click the **Save** button.

Locating items in the console

After you have run the search and get some search results, you can easily locate the items returned by the search in the Agent Console with a click of a button. You are automatically taken to the exact case, activity, article, or customer in the Agent Console.

To locate an item in the console

1. After you run the search, from the Results pane select the item you want to locate in the console.
2. In the Results pane toolbar, click the **Locate in console** button. You are taken to the exact location of the item in the console.

Exporting search results

You can save a local copy of the search results on your computer. Once you save the results on your local machine or network, you do not have to be logged in to the console to access the search results. The results are saved in EXCEL format.

To export the search results

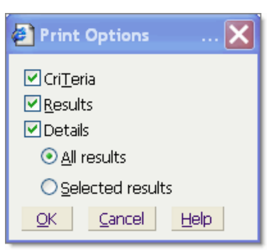
1. After you run the search, in the Results pane toolbar, click the **Export search results** button. A message appears asking, if you want to open or save the search results. Click the **Save** button.
2. A message appears asking where you want to save the results. Select the location where you want to save the results. The results are saved in EXCEL format.

Printing search results

Print search results for using it to circulate important data amongst other members or else in a presentation. With printed search data handy, you do not have to log in to the console to access the same information all the time.

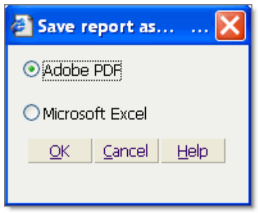
To print search results

1. After you run the search click the **Print Preview** button in the Criteria pane toolbar.
2. In the Print Options window, from the available options select what you want to print. The options available are - **Criteria, Results, Details.** And, specify if you want to print all the results, or selected results only. Click the **OK** button.



Configure print options

3. Search_Print window appears. It shows the details of all the items selected for printing. In the window, click the **Save As**  button. In the Save As window, select the format in which you want to save the search results. The options available are Adobe Acrobat PDF and Microsoft Excel. Click the **OK** button.



Select a format for printing search results

4

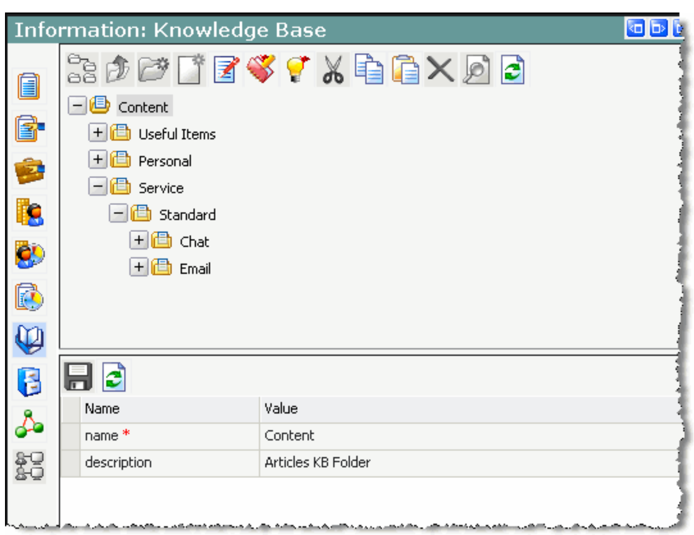
Information pane

About the Information pane

From the Information pane you can view the information about cases, activities, and customers. You can also view the articles in the Knowledge Base. The system consists of 11 predefined information pane sections. Out of them, eight are available to all the agents and three are available to only the agents with specific licenses.

- The following sections are available to all the agents.
  - Activity Body
  - Activity Details
  - Case Details
  - Customer
  - Customer History
  - Audit
  - Knowledge Base
  - Classification
- The Links section is available to only the agents with Data Adapter license.
- The following sections are available only to the agents with Cisco Unified Web Interaction Manager license.
  - Web Collaboration
  - Screen Capture

The order and number of these sections can be different based on how your administrator has configured the system. Also, there can be custom sections available.



A sample Information pane

From the Information pane you can view the details of the following business objects.

- Activity body and details; Audit information of activities
- Case details
- Customer information and customer history

You can also do the following:

1. Change priority of activities
2. Change severity of cases
3. Change due date of activities and cases
4. Create new cases and change cases of activities
5. Close cases
6. Print cases and activities details
7. Change preferred agent of customer
8. Change contact details of customer
9. Create new customers and change the customer associated with an activity
10. Delete customers
11. Change customer details

Shortcuts for information pane section toolbar

Your administrator can assign shortcut keys to different sections of the Information pane toolbar. You can toggle between the different sections by using the following shortcut keys.

- CTRL+SHIFT+ one of the following FUNCTION keys:
    - F2
    - F3
    - F4
    - F6
    - F7
    - F8
    - F9
    - F10
    - F11
    - F12

5 Cases

About cases

A case is used to group activities related to the same issue. It can contain activities of various channels such as email, chat, phone, and tasks.

A case can be in the open or closed state. If the case contains incomplete activities, then the status of the case remains open. A case is closed if the case holds activities that are completed. A closed case can be reopened by rules.

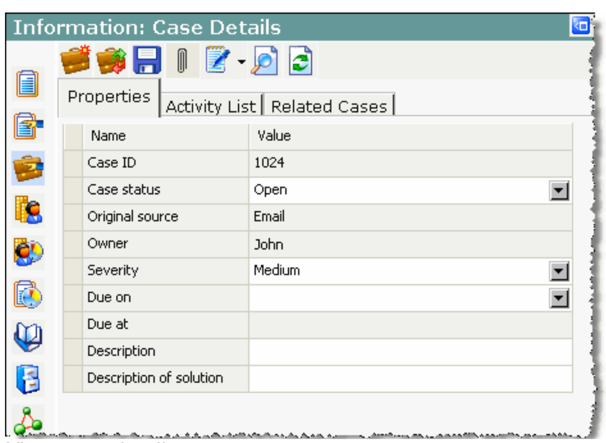
A case assists in the following:

- Maintain records of all customer activities.
- Hold together different channels of activities such as email, chat, phone, and tasks into one single entity in the form of a case.
- Provide information about the customer and related activities to the agent servicing the customer.
- Tracks service request by a customer with a company across multiple activities.

Viewing case information

To view the case information

1. In the Information pane, go to the Case Details section.
2. In the Case Details section, view the properties of the case, the list of activities associated with the case, and related cases, if there are any.

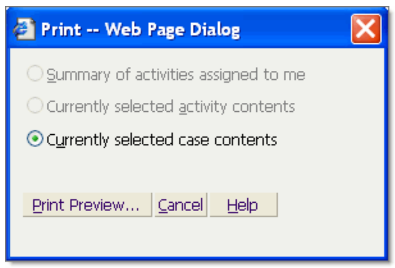


View case details

Printing case information

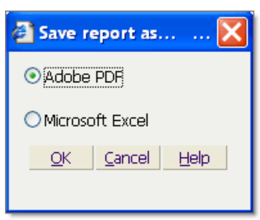
To print case information

1. In the Information pane, go to the Case Details section.
2. In the Case Details section, click the **Print** button.
3. The Print window opens. The **Currently selected case contents** option is selected. Click the **Print Preview** button.



Configure print options

4. The Case Content window opens. It shows the details of the case and activities contained in the case. Click the **Save As** button.
5. In the Save As window, select the format in which you want to save the contents of the folder. The options available are **Adobe Acrobat PDF** and **Microsoft Excel**. Click the **OK** button.



Select a format for saving case information

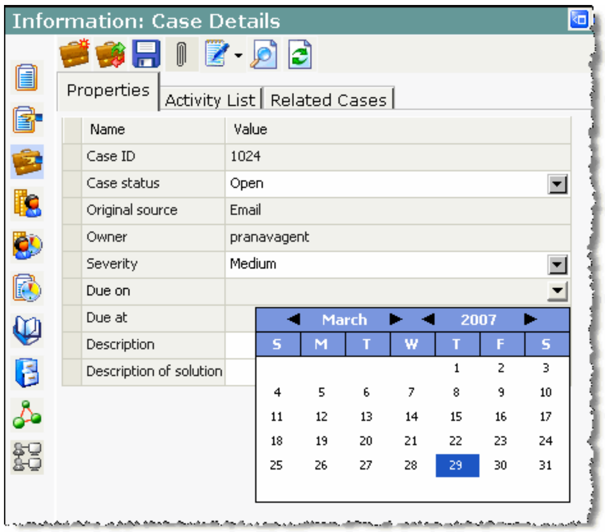
A copy of the case details is saved on the location you selected. You can print as many hard copies as you want.

Changing due date of cases

To change the due date

1. In the Information pane, go to the Case Details section.

2. In the Case Details section, in the **Due on** field, click the dropdown button. From the calendar select a date. You can also type the date in the field. The format of the date should be 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

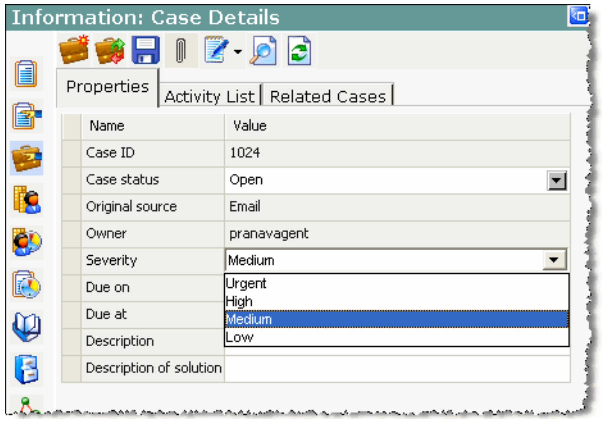
1. In the Information pane section toolbar, go to the Case Details section.
2. In the Case Details section, in the **Description of solution** field, provide a brief description of the solution of the case.
3. Click the **Save** button.

Changing severity

To change the severity of a case

1. In the Information pane, go to the Case Details section.

2. In the Case Details section, in the **Severity** field, select the severity of the case. You can set the severity level as low, medium, high, or urgent.



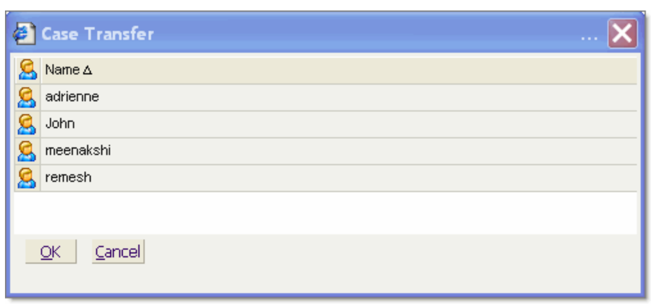
Change severity of a case

3. Click the **Save** button.

Transferring cases

To transfer a case

1. In the Information pane, go to the Case Details section.
2. In the Case Details section, in the **Owner** field, click the **Assistance** button.



Select a user

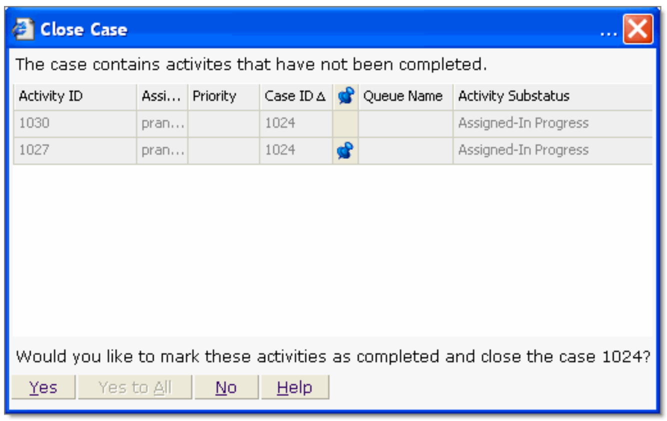
3. In the Case Transfer window, from the list of users select the user to whom you want to transfer the case.
4. Click the **Save** button.

Closing cases

To close a case

1. In the Information pane, go to the Case Details section.
2. In the Case Details section, 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 the activity and close the case.



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 create new cases and also change the case of an activity.

Can cases be reopened?

You can't reopen cases manually. However, a case gets reopened automatically when:

- The customer sends an email with the closed case number in the subject. This happens only if the administrator has configured the system in that way.
- The agent creates a new activity using a closed case number.

6 Activities

About activities

A task or any interaction with a customer is an activity. Interactions can be of various types—emails, chats, phone calls, or even custom-defined activities.

Activities related to the same issue can be grouped into a case. A case can contain activities of various channels.

The state of the activity is either Current or Completed. As long as the issue is unresolved, the activity remains in the Current state. When an issue is resolved, the activity state is Completed.

Types of activities

1. Email
2. Phone
3. Chat
4. Task

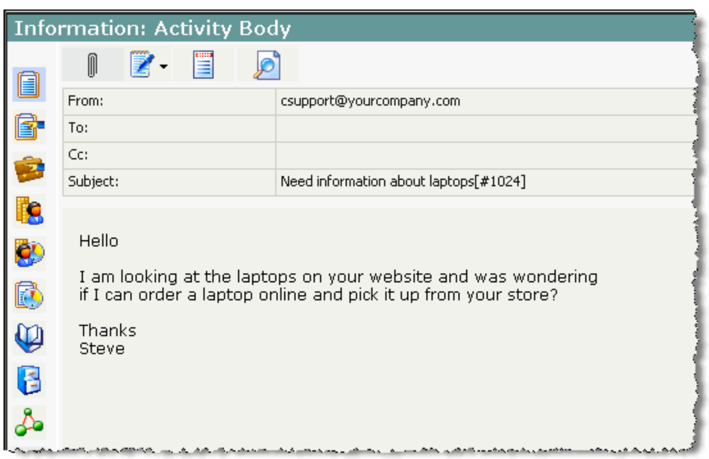
Viewing activity information

Viewing activity body

To view the activity body

- In the Information pane, go to the Activity Body section.

  In the Activity Body section, you can view the body of the activity.

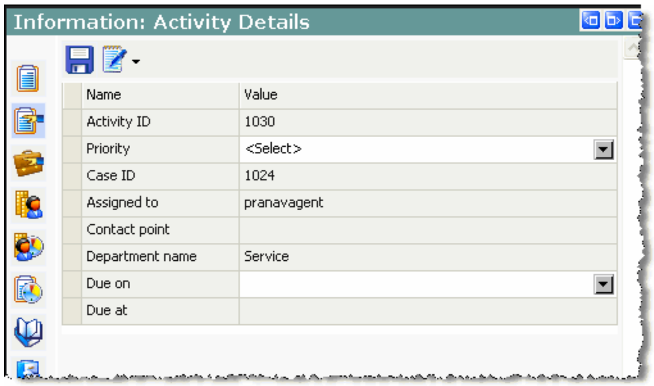


View activity body

Viewing activity details

To view the activity details

- In the Information pane, go to the Activity Details section. Here you can view the details of the activity and change the priority and due date of an activity.



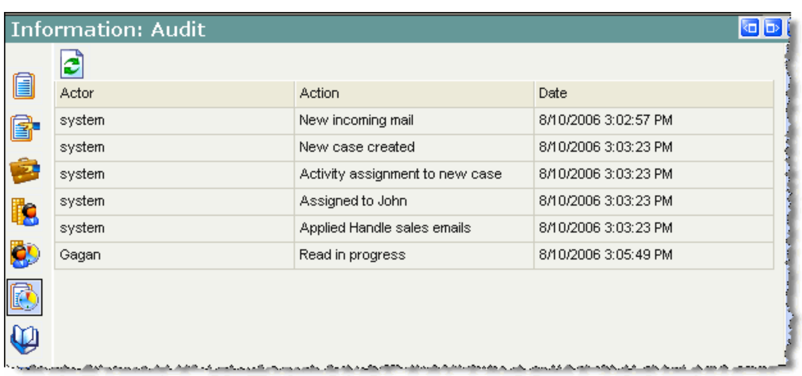
View activity details

Viewing audit information

Audit shows every single action that has occurred on an activity. It gives a complete information from the moment the activity was created to where the activity is at present.

To view the audit information

- In the Information pane, go to the Audit section. Here you can view the audit information.

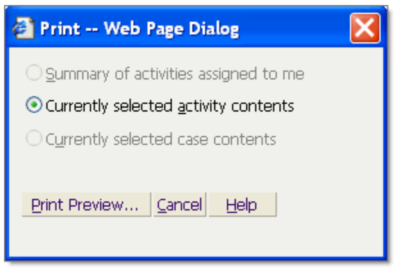


View audit details

Printing activity information

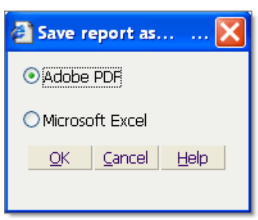
To print activity information

1. In the Information pane, go to the Activity Body section.
2. In the Activity Body section, click the **Print** button.
3. The Print window opens. The **Currently selected activity contents** option is selected. Click the **Print Preview** button.



Configure print options

4. The Activity Content window opens. It shows the details of the activity. Click the **Save As** button.
5. In the Save As window, select the format in which you want to save the contents of the activity. The options available are **Adobe Acrobat PDF** and **Microsoft Excel**. Click the **OK** button. A copy of the activity details is saved on the location you selected. You can print as many hard copies as you want.



Select a format for saving activity information

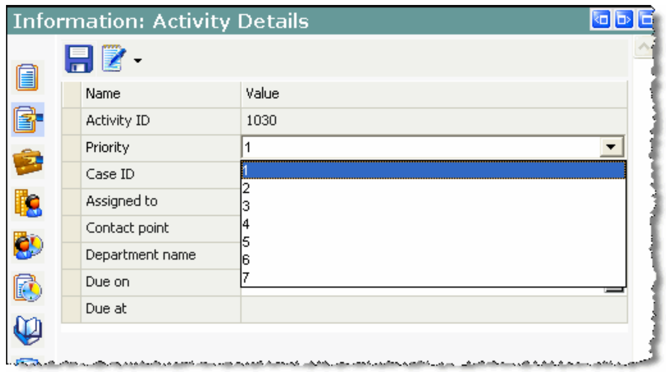
Changing priority of activities

For activities, you can set a priority from 1 to 7.

To change the priority

1. In the Information pane, go to the Activity Details section.

2. In the Activity Details section, go to the **Priority** field and from the dropdown list select the priority of the activity.



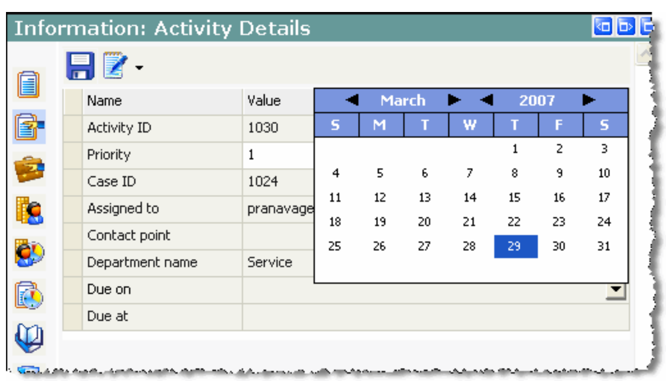
Set priority of an activity

3. Click the **Save** button.

Changing due date of activities

To change the due date

1. In the Information pane, go to the Activity Details section.
2. In the Activity Details section, in the **Due on** field, click the dropdown button. From the calendar select a date. You can also type the date in the field. The format of the date should be DD/MM/YYYY.



Set due date for an activity

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

Creating case for activities

To create a case

1. In the Inbox pane select the activity for which you want to create a case.
2. In the Information pane, go to the Case Details section.
3. In the Information pane toolbar, click the **Create case** button.

   The Case Details section refreshes to show the details of the case.
4. You can change the severity, due date and due time, and the solution description of the case.
5. After making the changes, in the Information pane toolbar, click the **Save** button.

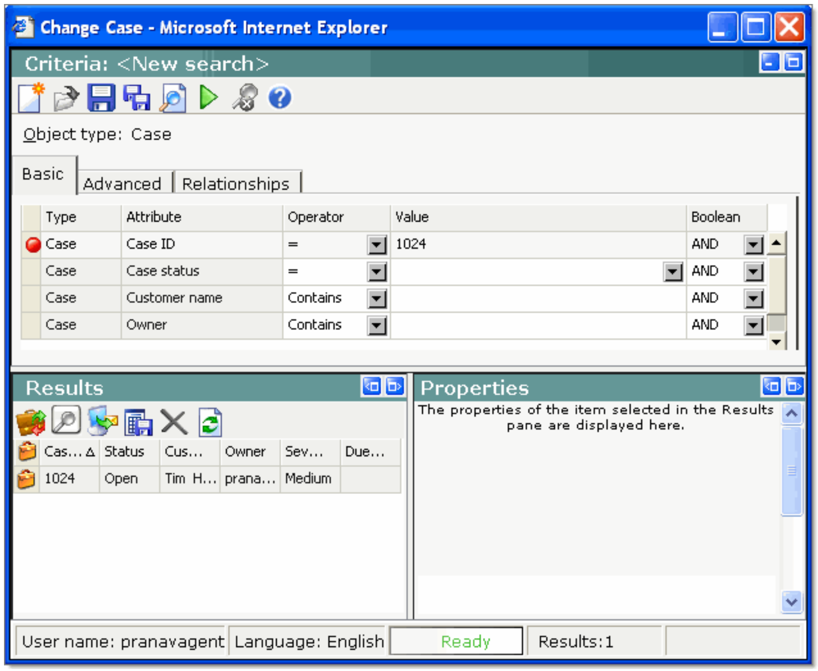
   A new case ID is created for the case and it is assigned to the activity.

Changing cases of activities

To change the case

1. In the Inbox pane select the activity for which you want to change the case.
2. In the Information pane, go to the Case Details section.
3. In the Information pane toolbar, click the **Change case** button.
4. In the Change Case window search for the case.

5. From the Result pane, select the case and click the **Change case**  button.



Change case of an activity

7 Customers

About customers

The customers are classified as follows:

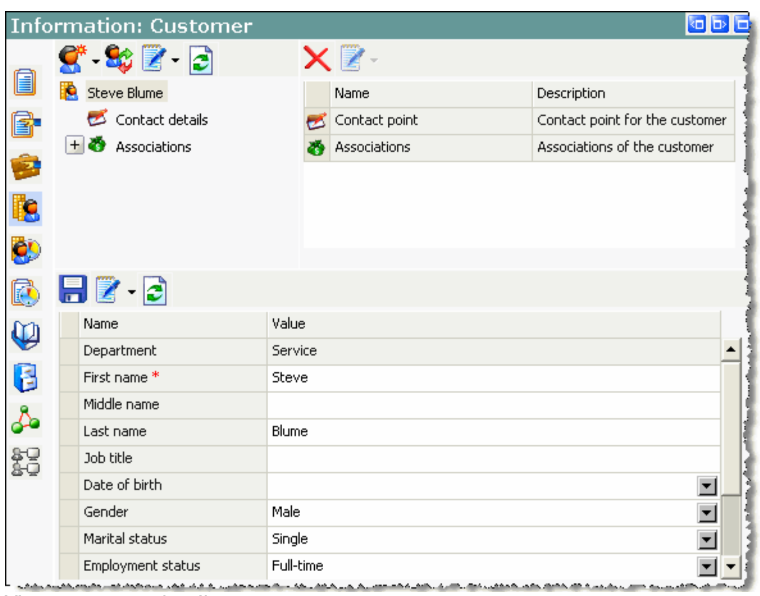
- Individual
- Corporate
- Group

Viewing customer information

Viewing customer details

To view the customer details

1. In the Information pane, go to the Customer section.
2. In the Customer section, you can view and change the customer details.



View customer details

Changing customer details

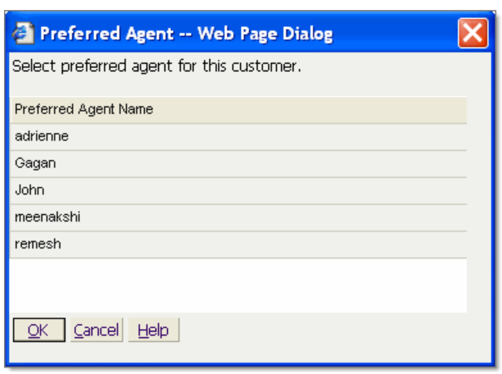
To change the customer details

1. In the Information pane, go to the Customer section.
2. In the Customer section, change the customer details. You can change the customer attributes, like customer name, job title, marital status, employment status etc.
3. Click the **Save** button.

Changing the preferred agent

To change the preferred agent

1. In the Information pane, go to the Customer section.
2. In the Customer section, in the **Preferred agent** field and click the **Assistance** button.
3. In the Preferred Agent window, from the list of agents select the preferred agent of the customer and click the **OK** button.



Select a preferred agent

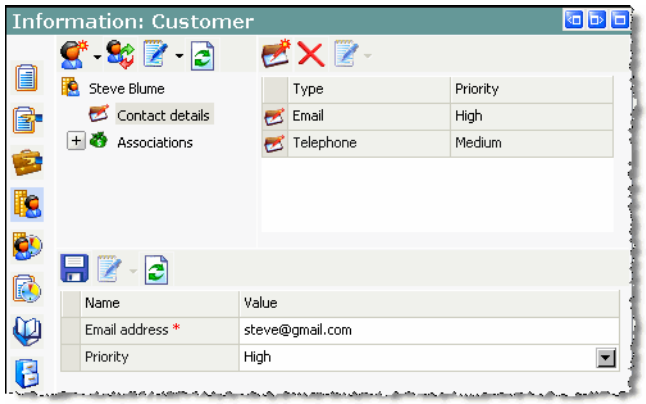
4. Click the **Save** button.

Changing contact details of customers

To change the contact details of a customer

1. In the Information pane, go to the Customer section.
2. In the Customer section, browses to the **Contact Details** node.

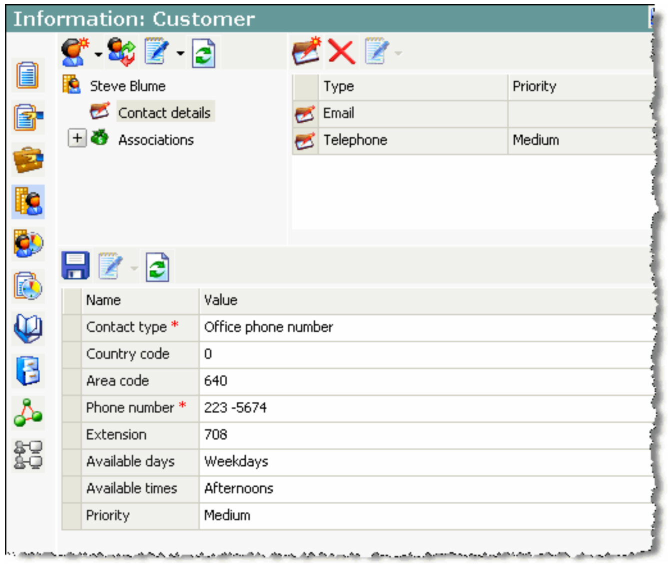
   You can view the contact information of the customer.



View contact details of a customer

3. To edit the contact information select the contact point from the list and edit it. Click the **Save** button.
4. To delete the contact information, select the contact point you want to delete and click the **Delete** button in the Information pane toolbar.

5. To create a new contact point click the **New** button in the Information pane toolbar. Select the contact point type you want to create, provide the details and click the **Save** button.



Create a new contact point

Creating customers

To create a customer

1. In the Information pane, go to the Customer section.
2. In the Information pane toolbar, click the arrow in the **New Customer** button. From the list displayed select the type of customer you want to create. The options available are, group, individual, and corporate customer.
3. The Information pane refreshes to show the details of the type of customer you select.
4. Provide the details of the customer and click the **Save** button.
5. Next, create the contact information of the customer. You can provide the phone number, email address, and postal address of the customer.
6. For corporate and group customers you need to create a contact person.

8 Tasks

- Assigning tasks
- Completing tasks

Tasks can be referred to as general activities which can be created for internal work allocation from a manager to an agent. An agent can create a task to mark out things that need attention or things that need to be done.

For example an agent is having a phone conversation and some brochures have to be sent to the customer. In this case the agent can create a task and can assign it to the system or queue or to another agent who is responsible for mailing out brochures to the customers. Or if the agent himself has to send a fax or other type of information to the customer then he can create a task and assign it to himself.

When a new task is created by default it is assigned to the creator. Tasks can be assigned to:

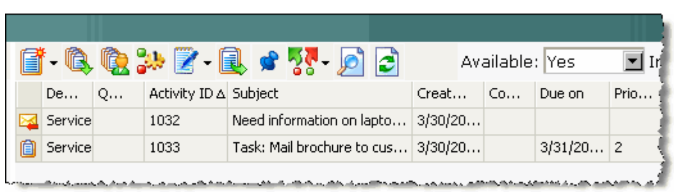
1. **User**: You can assign tasks to users on whom you have assign permissions.
2. **Queue**: You can assign the tasks to queues on which you have assign permissions
3. **System**: If you are not sure to which queue or user to assign the task or you do not have permission to assign to any of them then you can assign the task to the system. Then the system reassigns the task to the queue or user who is appropriate for handling the task. All agents have permission to assign a task to the system.

Assigning tasks

An agent can assign tasks to queues or users only if they have permission to do so.

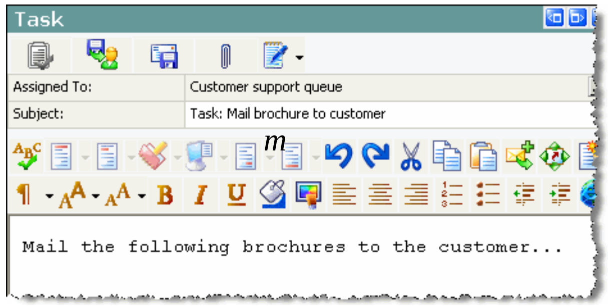
To assign a task

1. Create an activity with the **Activity type** as **Task.**
2. Select a task type activity from the inbox.
3. A task activity shows in the Inbox List pane.



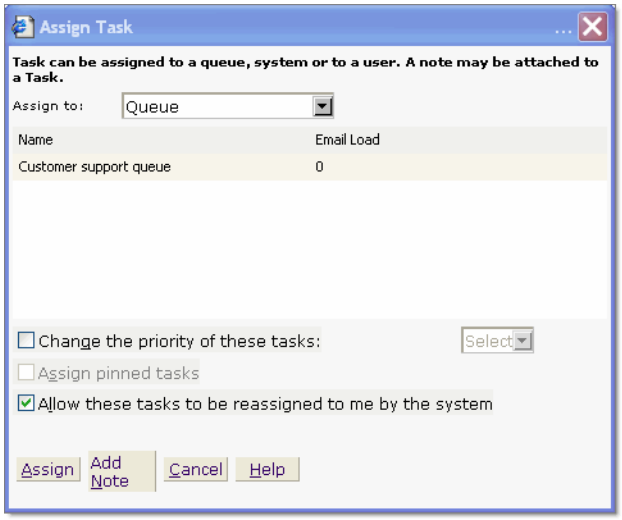
View the task in the List pane

4. In the Task pane, view the details of the task.



A sample task

5. Type a subject and content of the message you want to send.
6. Attach files to the task by using the **Attachment** button.
7. Add, view, or delete notes from the task by using the **Notes** button.
8. When you create a new task activity it is assigned to you. If you want to assign the activity to another user, queue, or system, in the **Assigned To** field, click the **Assistance** button. In the Assign Task window, provide the following details.
   - **Assign to**: You can assign the task to Queue, System or User on whom you have permissions to assign tasks. From the dropdown list select to whom you want to assign the task.
   - **Change priority of these tasks:** You can change the priority of the task before assigning it. Select the option if you want to change the priority of the task. From the dropdown list select the priority of the task.
   - **Assign pinned tasks**: You can assign pinned tasks. The option is enabled only if you are assigning a pinned task. Select the option if you want to assign pinned tasks.
   - **Allow these tasks to be re-assigned to me by the system:** If you are assigning a task to a queue, you can decide if you want the task to be re-assigned to you or not. This option is selected by default and is available only when you are assigning a task to a queue. Select the option if you want the activity to be re-assigned to you.
   - **Add note:** You can add a note to the task before assigning it.
   - Click the **Assign** button.



Assign task to user, queue, or system

The **Assigned To** field in the reply pane now shows the name of the person, queue, or system to whom you are assigning the task.

9. In the Task pane toolbar, click the **Assign to** button.

Completing tasks

Once you have done what ever was required to complete the task assigned, you must mark the activity as completed. Once you change the substatus of the activity as completed the activity goes in the **Completed** folder in the inbox. You can mark the task completed in two ways.

To complete a task

You can mark the task completed in two ways.

1. In the Inbox pane toolbar, click the click the arrow in the **Change status** button.From the list displayed select the status as **Complete**.

OR

2. Click the **Completed** button. The activity substatus will change to **Done** and it will move to the **Completed** folder in the Inbox.

9 Emails

Working with emails

Send

Send is used to send an email.

To send an email

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

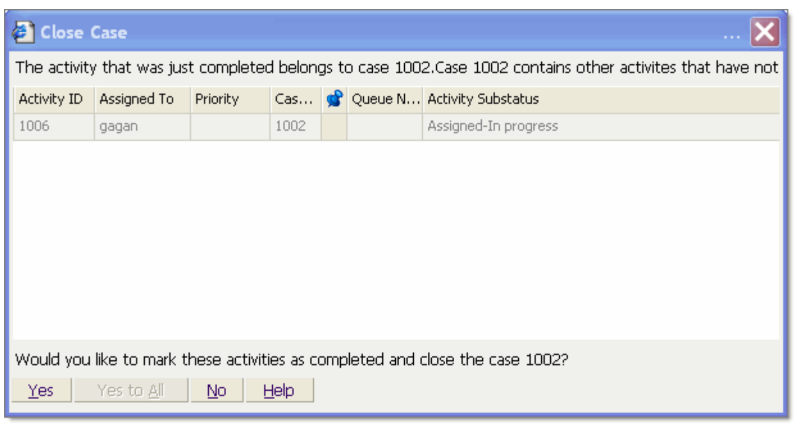
Complete

You can use this option if no email is to be sent to the customer and you have completed the activity assigned to you.

To complete an activity

- In the Reply pane toolbar, click the **Complete** button.

If any incomplete activities belong to the same case, you are prompted to complete that activity and close the case.



Complete activity and close case

Send and complete

When you are replying to a mail and your reply will complete the activity assigned to you then you can use **Send and Complete** button to send the reply and at the same time set the state of the activity to **Complete.**

For example: The customer had asked for some information regarding a product. Sending the information to the customer will complete the activity assigned to you.

To send and complete

- In the Reply pane toolbar, click the **Send and complete** button. It will send the reply and set the state of the activity to **Complete.**

Save draft

You are working on an activity and you have added a message in the reply pane and have made some more changes to the reply but you don't want to send or complete the message immediately but you want to come back to the activity and work on it later. Here you can use save draft to save the changes you have made.

Important: If you do not do save draft and go to another activity you will lose all the changes that you made.

Save draft has to be done:

1. After making changes to the reply.
2. After attaching a file.
3. Before transferring an activity.

Save draft is not to be done:

1. After adding note.
2. Before doing **Send** or **Send and complete** or **Complete.**

To do save draft

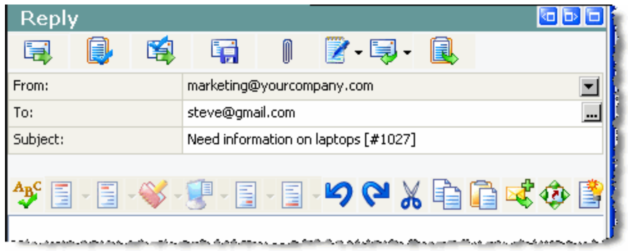
- In the Reply pane toolbar, click the **Save draft** button.

From field

The from field contains the address which will be shown in the from line when the mail is received by the customer. By default the field shows the originating entry point address.

To change the from email address

1. Type or select the address that you want to show in the from line. For example: The activity came in the queue and the email is being replied by an agent in accounts, so you can change the from field showing the email address of accounts department.

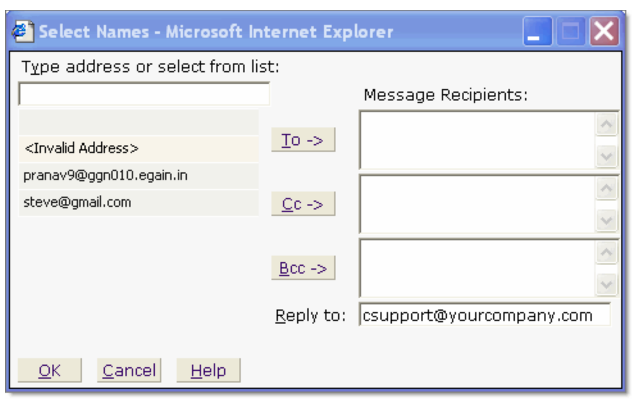


Change the From email address

If you want the reply from the customer to come to the address specified in the **From** field and want it to go to a different address then, do the following.

2. Click the **Assistance**  button in the **To** field.

3. In the Select Names window, in the **Reply to** field, type the address to which the reply email from the customer should go. By default the field shows the address selected in the **From** field. For example: You give a different address in the **From** field and a different address for **Reply to.** When the customer receives the email the **From** line will show the address you gave in the **From** field. When the customer replies to the email the **To** field will show the address you gave in **Reply to** field and the reply will go to this address.



Provide an address in the Reply to field

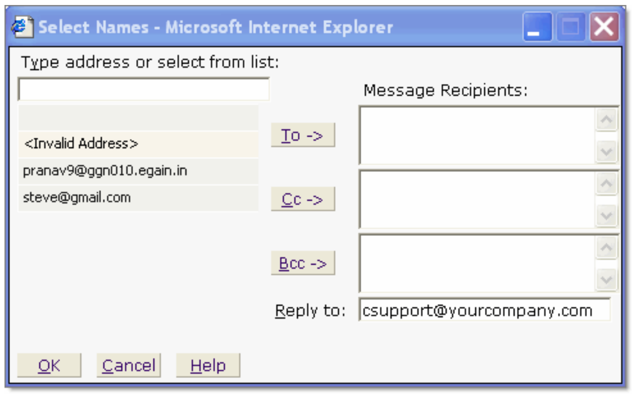
To, Bcc, and Cc field

When you are replying to an email the To field will show the email address from which the email came. If you are sending an outbound email the To field shows the address given while creating the activity.

To add addresses in To, Bcc, or Cc field

If you know the email addresses to which you have to send the email you can type them in the To, Bcc or Cc field. If you want to use the address book, then follow the following steps:

1. Click the **Assistance** button in the **To** field. Select Names window appears.



Specify the To, BCC, and CC addresses

2. In the Select Names window, do the following.

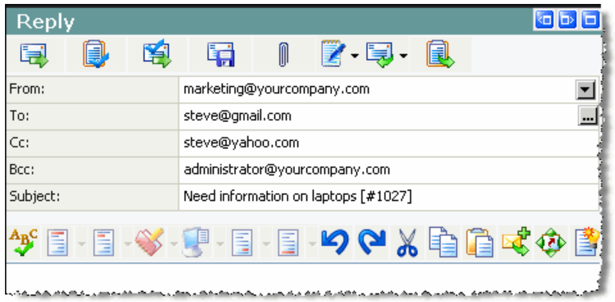
   a. **Type address or select from list:** The addresses in the list are arranged in alphabetic order. If you know the alphabet with which the email address starts you can type it in this field. For example: You want to Bcc the email to an email address which starts with "M". Type M in the field. The addresses will show as below: From the list of addresses select the addresses you want to add in To, Cc, or Bcc field. If you do not know, then scroll through the addresses and select the address to which you want to send the email.

   b. Click the **To, Cc,** or **Bcc** button to add the address in the appropriate field.

   c. Click the **OK** button.

Important: By default the reply pane has only To field. You can add the Bcc and CC field by changing preferences. For details, see *"Preferences and settings" on page 10*. If the reply pane does not have Bcc and Cc field and you select the addresses for Cc and Bcc field, the fields will be added automatically.

If the email address in the To field is different from the email address given in the contact point of the customer, you are notified about the same.



A sample Reply pane

Subject

The subject field of the email tells 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. It is recommended to use a subject that is concise and informative.

To add subject

- Type the subject in the subject field.

10 Chats

Chat basics

Chat activity indicator

When a new chat activity is assigned to you and you are in the main inbox the chat inbox button will blink in red.

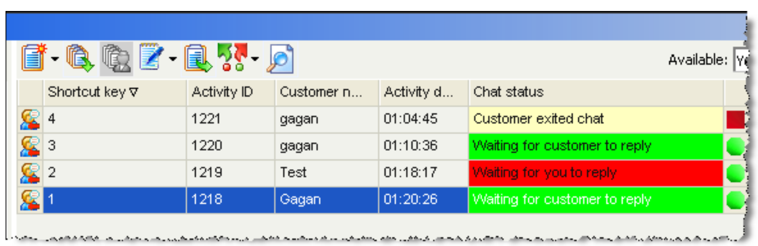
If you are in the Main Inbox, and a chat session is in progress, and the customers sends a new message, the Chat Inbox indicator will blink in red.

New chat activity indicator

If a new chat comes in a queue on which you have pull permissions, and you are working on some other application on your machine, the Agent console window will pop to the front.

Chat status

For all the open chat activities you can see the status of the chats in the List pane. The chat status is indicated using text and color coding.



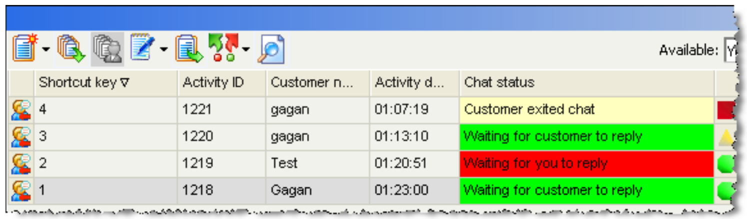
View chat status

The status of a chat can be one of the following.

- **Waiting for you to reply:** This means the last message was sent by the customer to the agent. This will be the default chat status when a new chat activity comes in the inbox. This status is shown in red color.
- **Waiting for customer to reply:** This means the last message was sent by the agent to the customer. This status is shown in green color.
- **Customer not connected:** This means that the customer got accidentally disconnected because of browser crash or some other error.
- **Customer exited chat:** This means that customer has exited the chat. This status is shown in off-white color.

Customer connection status

In the chat inbox list pane, you can see the connection status of the each customer.



Shortcut key	Activity ID	Customer n...	Activity d...	Chat status
4	1221	gagan	01:07:19	Customer exited chat
3	1220	gagan	01:13:10	Waiting for customer to reply
2	1219	Test	01:20:51	Waiting for you to reply
1	1218	Gagan	01:23:00	Waiting for customer to reply

View customer connection status

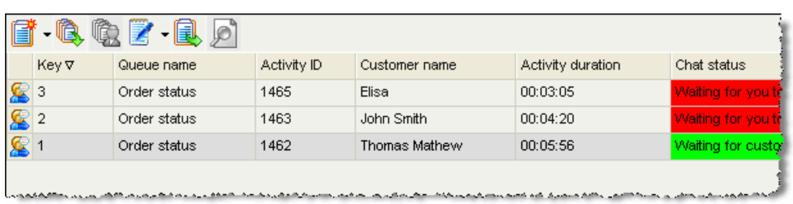
The customer connection status can be one of the following.

- **Fast, connected:** The customer is connected and the connection is fast. It is shown using a green circle.
- **Slow, but still connected:** The customer is connected but the connection is slow. It is shown using a yellow triangle.
- **Not connected:** The customer is not connected. It is shown using a red square.

Shortcuts for multiple chats

A number from one to nine is assigned as a key to every chat activity that arrives in the agent's inbox. The lowest available number is assigned to the new chat activity that comes in the inbox. Once a value is assigned to a chat activity it does not change till the activity is completed. Once the activity is completed, the key is freed and is assigned to the next chat coming to the inbox. The keys can be used to quickly toggle between the chat activities in the inbox.

Important: Shortcut keys are assigned only to chat activities and not to any other type of activity.



Key	Queue name	Activity ID	Customer name	Activity duration	Chat status
3	Order status	1465	Elisa	00:03:05	Waiting for you t
2	Order status	1463	John Smith	00:04:20	Waiting for you t
1	Order status	1462	Thomas Mathew	00:05:56	Waiting for custo

View keys assigned to chats

An example of how keys are assigned

A chat activity 1001 comes in an empty chat inbox, it is assigned the key 1. While chatting, another chat activity 1002 comes in the chat inbox, it is assigned the key 2. An email activity 1003 comes, it is not assigned any shortcut key. The agent completes chat activity 1002, and the shortcut key 2 becomes available for assignment. A chat activity 1004 comes in the chat inbox, it is assigned the shortcut key 2.

Important: For shortcut Keys you will not be able to use numbers from the Numeric pad because pressing the shift key overrides the Numeric lock.

Toggling between inboxes

The Agent Console has two inboxes. One is the chat inbox that shows the chat activities and the other the main inbox that shows all other activities. You can easily toggle between the two inboxes using a shortcut.

To toggle between the inboxes

- Use the shortcut key SHIFT+CTRL+SPACE to switch from one inbox to the other.

Conducting chat sessions

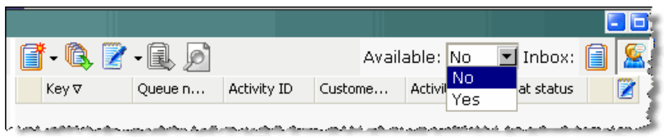
Making yourself available

For the system to be able to assign chat activities to you, you should make yourself available in the chat inbox. You can change this setting only if you have the permission to do so. If you make yourself unavailable you can still pull chat activities from the queues on which you have pull permissions. If your administrator has not given you the permission to change the availability setting, then you become available for handling chat activities as soon as you log in to the Agent Console and become unavailable when you logout.

Important: If you have the permission to change your availability setting, you have to make yourself available every time you log in to the Agent Console.

To make yourself available in the chat inbox

1. Go to your chat inbox.
2. In the Chat Inbox toolbar, in the **Available** box select **Yes** to make yourself available for handling chats.



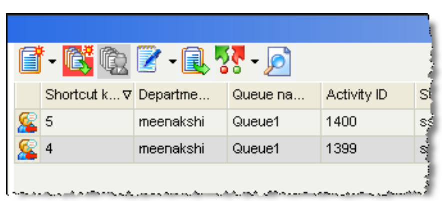
Change your availability

Pulling chats

You can pull chats from the queues on which you have pull permissions and if you have the action assigned to pull chat activities. When a chat activity comes in the queue the **Pull next** button blinks red. When you click the button when it is still blinking a chat gets assigned to you. You can pull chat activities even when you are in the main inbox. If you pull chat activities from the main inbox, you are taken to the pulled chat activity in the chat inbox and you can start working on it. But, if you are in the chat inbox and are working on a chat activity and you pull a new chat activity, the new chat activity comes in your inbox but your focus doesn't get shifted to the pulled activity. You can continue to work on the chat you were working on.

To pull chat activities

- In the Inbox List pane toolbar, click the **Pull next** button when it is blinking red. One activity with the maximum waiting time gets pulled in your inbox.



Click the Pull next button

Moving between chats

To move between chats

- Use the shortcut SHIFT+ CTRL + Key (1 to 9) to toggle between the chat activities.

For example: If you have selected a chat activity with key 1 and you want to go to activity with key 2 use the shortcut:

  - SHIFT + CTRL + 2

  And, to go back to activity with key 1 use the shortcut:

  - SHIFT + CTRL + 1

Sending messages to the customer

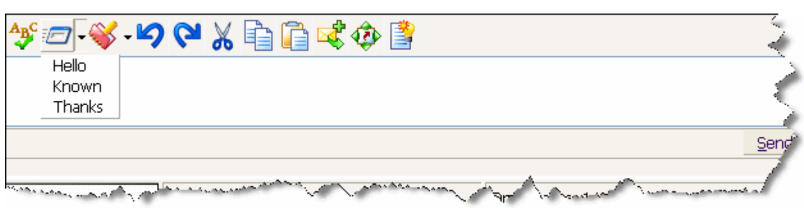
To send messages to the customer

1. In the Chat pane in the **Text box** type the message you want to send to the customer.

   If your administrator has configured quick responses for the common messages used in chat, then you can use them.

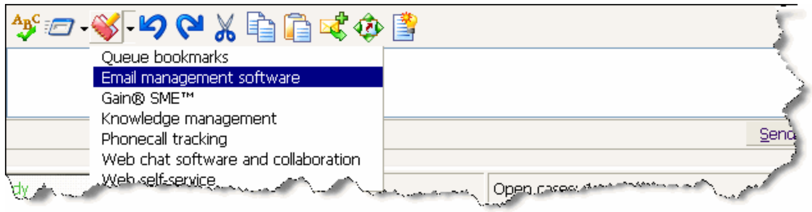
2. To use the quick responses, in the Text box toolbar click the arrow in the **Quick responses** button. From the list of quick responses select the one you want to use. The text of the quick response appears in the Text box. Review it and make any changes, if required. Click the **Send** button or press `ENTER` to send the message to the customer.

   Like quick responses, you can also use bookmarks to send canned messages quickly to the customers.

   Select a quick response

3. To use the bookmarks, in the **Text box** toolbar click the arrow in the **Bookmarks** button. From the list of bookmarked articles select the one you want to use. The text of the article appears in the **Text box**. Review it and make any changes, if required. Click the **Send** button or press `ENTER` to send the message to the customer.



Select a bookmarked article

Before sending the message to the customer you can also do a spell check.

4. To run a spell check, click the **Spell check** button in the Text box toolbar. If your administrator has configured auto spell check then every time you send a message the spell checker runs automatically.

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

Sending web pages to customers

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 page to the customer

1. In the Information pane, go to the Web Collaboration section.
2. In the Web Collaboration toolbar, in the **Address** box, type the URL you want to push to the customer.

   If your administrator has configured any quick links, you can use them to quickly send the web pages to the customer.

3. In the Web Collaboration toolbar click the arrow next to the **Quick links** button. From the drop down select the URL of the page you want to view.

Select a URL

   The page gets loaded in the Web collaboration section of the Information pane. If the web collaboration is configured in the pop-up mode, the web page opens in the pop-up window.

4. In the Web Collaboration toolbar, click the **Send page to customer** button.

If the administrator has blocked any web pages then you can’t send them to the customer. The blocked pages don’t get pushed to the customer but you can view them on your side.

Ending chat sessions

Transferring chats

Things to note

1. Chats can be transferred to users, queues, and departments.
2. Chats can be transferred only to the users who are available for handling chats.
3. Only one chat activity can be transferred at a time.
4. Chats cannot be transferred to agents who have reached their Chat - User Max Load.
5. Only open chat activities where the customer has not left the chat session can be transferred.

To transfer a chat

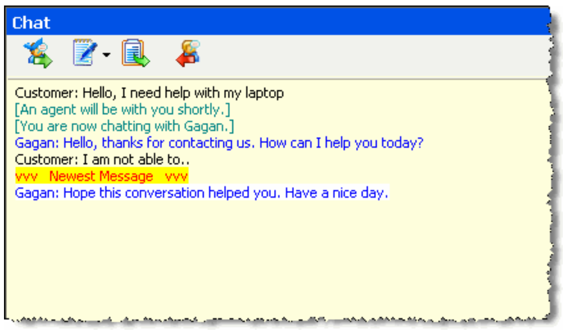
1. In the chat inbox select the chat you want to transfer.
2. In the Chat pane or Inbox pane toolbar click the **Transfer** button.
3. In the Transfer Activities windows, select if you want to transfer the chat to another agent, queue, or a department. From the list of available agents, queues, or departments select the one to which you want to transfer the chat and click the **Transfer** button.

Completing chats

After servicing the customer you can either leave the chat or complete it. When you click the **Complete** button, the activity gets completed and shows in the **Completed** folder of the inbox.

To complete a chat

- Click the **Complete** button in the Chat pane toolbar. When you complete the chat the customer is shown the exit template and a list of URLs sent to him, if any.



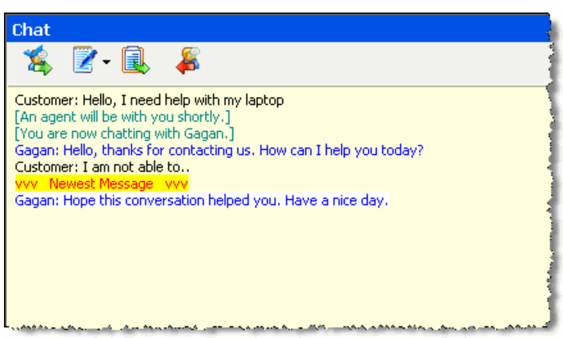
Click the Complete button

Leaving chats

After servicing the customer you can either leave the chat or complete it. When you click the **Leave** button, the activity is removed from your chat inbox but it gets completed only when the customer closes the chat session.

To leave a chat

- Click the **Leave** button in the Chat pane toolbar. When you leave the chat a message is shown to the customer that the agent has left the chat.



Click the Leave button

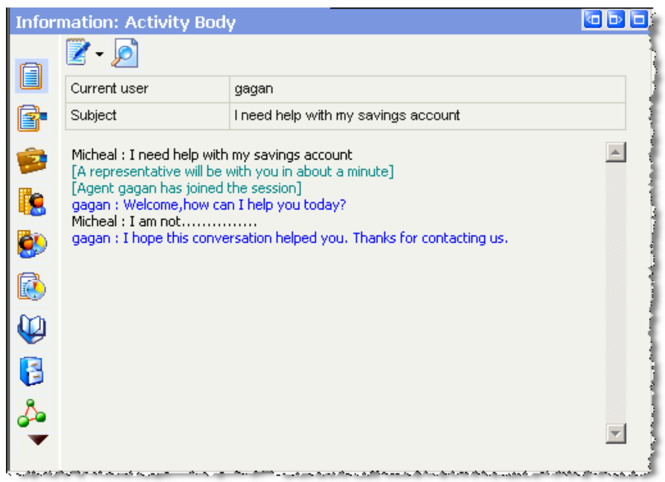
Viewing chat activity information

Viewing activity body

The activity body shows the transcript of the chat. You can view the activity body for only completed chat activities and not for chats that are in progress.

To view the activity body

- In the Information pane, go to the Activity Body section.



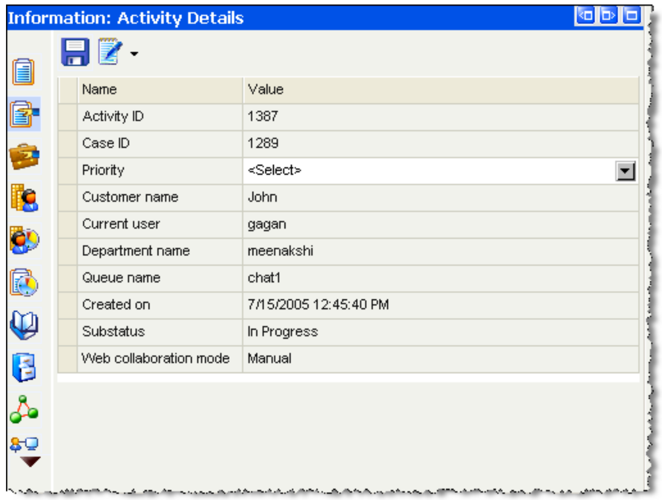
View chat transcript

The activity body shows the following details.

- **Current use**r: The name of the agent who serviced the chat.
- **Subject**: The subject is the first message sent by the customer before the agent joined the chat.
- **Text of the chat transcript**: The complete chat transcript.

Viewing activity details

You can view the details of the chat activities from the **Activities Details** section of the Information pane. You can view the case ID, activity ID, queue name, and certain more details about the activity. From here you can also change the priority of the activity. The information listed in this section can be more or less depending on what your administrator has configured for the department.



View chat details

To view the activity details

1. In the Information pane, go to the Activity Details section. By default the activity details section shows the following information.
   - **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**: It shows the priority of the activity. By default there is no priority set for the activity. You can set the priority from one to seven. Priority of completed chat activities cannot be changed.
   - **Customer name:** The name of the customer associated with the chat activity.
   - **Current user:** The name of the agent to whom the activity is assigned.
   - **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.
   - **When created:** The date and time when the chat was created.
   - **Substatus:** The substatus of an open chat activity is **In progress**, and of a completed activity is **Done**.
   - **Web collaboration mode:** It shows the web collaboration mode of the customer. The web collaboration mode can be **Manual, Basic,** or **Advanced.**

Viewing audit information

An Audit shows the complete life cycle of the chat activity from it’s creation to it’s completion.

The following table shows the audit details.

Actor	Action	Description
system	New incoming Chat activity	
system	New case created	
system	Activity assignment to new case	
system	Assigned to queue < queue name >	
system	Load balancing assigned to user <user name>	
< user name >	Pulled by user <user name>	
< user name >	Read in progress	
< user name 1 >	Transferred from user < user name 1 > to user < user name 2 >	
< user name >	Transferred from user < user name 1 > to queue < queue name >	
< user name >	Transferred from user < user name 1 > to department < department name >	
< user name >	User <user name> joined chat activity	When a supervisor joins a chat from the My Monitor node.
< user name 2 >	Transferred from user < user name 1 > to queue < queue name >	When a supervisor transfers a chat activity from an agent to a queue.
< user name 2 >	Transferred from user < user name 1 > to user < user name 3 >	When a supervisor transfers a chat activity from one agent to another agent.
Customer	Customer exited the chat	

Actor	Action	Description
< user name >	User < user name > left the chat	When a supervisor leaves a chat or when an agent leaves a chat.
system or < user name >	Activity completed	

View audit details

Chat monitors

About the chat monitors

Monitoring helps in reviewing the way agents handle chats and the type of responses they send. You can either monitor each agent individually or you can monitor selective queues and the chats coming through them.

You can provide guidance and assistance by joining the chat sessions, if required. While the monitoring in the Supervision console allows the supervisor to get an overview of the workload and service level adherence of various queues and users, the monitoring from the Agent Console allows to review the on-going chat sessions and join them, if required. Users who are assigned the action, Monitor Chat Activity, can monitor chats from the My monitor node in the Agent console. You can monitor all the users and queues on which you have view permission.

In the **Monitor** folder, you can view the following attributes of the chats.

1. **Screen name**: The screen name of the agent handling the chat.
2. **Queue name:** The name of the queue from which the chat came to the agent.
3. **Activity ID:** The activity ID of the chat.
4. **Customer name**: The name of the customer.
5. **Activity duration:** The duration of the chat.
6. **Substatus:** The substatus of the chat.
7. **Notes:** If there is a note added to the activity, a Note icon is shown in the List pane.
8. **Join indicators:** Two distinct icons, Joined and Not Joined, are used to indicate if you have joined the chat or not.

Monitoring chats

To monitor a chat

1. In the Inbox Tree pane, browse to **My work > Activities > My Monitor**.

Important: You can monitor only the queues and users on whom you have view permission.

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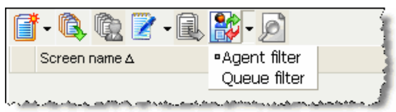
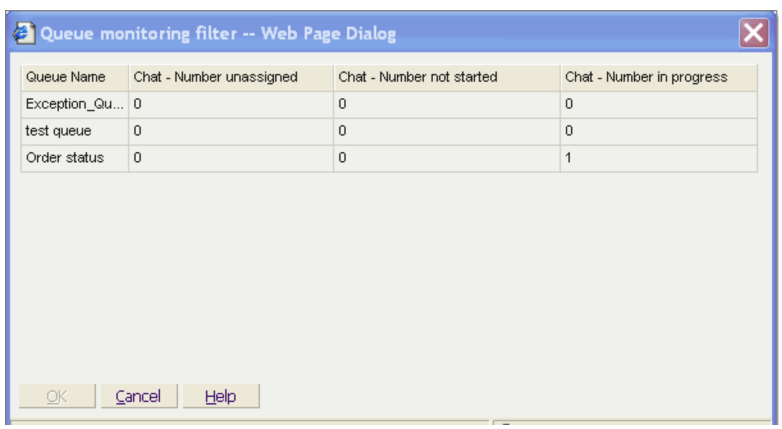
2. In the List pane toolbar, from the **Monitoring filter** button select if you want to monitor queues or agents.



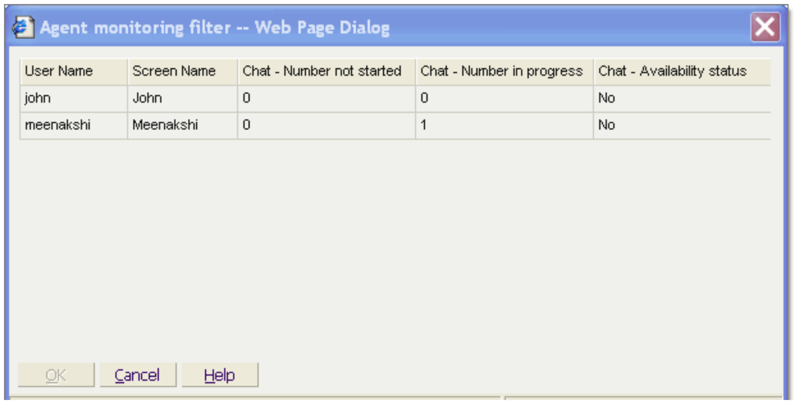
Select an object for monitoring

3. If you select the **Queue filter** option, the Queue monitoring filter window opens and 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.



Select a queue for monitoring

4. If you select the **Agent filter** option, the Agent monitoring filter window opens and from here you can select the agent you want to monitor. Before selecting the agent you can view the agent's screen name, if he has made himself available for handling chats, number of chats that are in progress, and number of chats on which he hasn't started working yet.



Select an agent for monitoring

If you have selected a user for monitoring, then in the List pane you can view the chats assigned to the user. And if you have selected

5. In the List pane, select the activity you want to monitor. The transcript of the chat appears in the Chat pane. The transcript in the Chat pane is refreshed automatically at specific time intervals.

   When you select a chat activity for monitoring, the Information pane is disabled and in the Chat pane only the Join button is enabled. You can silently monitor the chat activities without joining them. But, let us say for example, you are monitoring a chat activity and you find that the agent needs some help in handling the chat, or that you can provide additional information to the customer, you can easily join the chat session and participate in the chat. You cannot join the chats where the agent to whom the chat is assigned hasn't started chatting with the customer. You can join the chat where the agent has left the chat session.

6. To join the chat, click the **Join** button in the Chat pane toolbar. The number of chat activities that you can join as a supervisor is determined by a setting configured by your administrator.

Important: When you join a chat, no system message is sent to the agent or the customer to inform that you have joined.

Once you join a chat, the **Join** button is disabled, and all other buttons in the Chat pane are enabled. The Information pane is also enabled. The web page being co-browsed by the agent, appears in the Web Collaboration section of the

Information pane. You can now participate in the chat, by sending messages and by cobrowsing.

You can also join the chat sessions where the agent has left the chat session and the customer is still there. You can transfer, complete, or leave the chat activities. You can always join the chat again by clicking the **Join** button again.

11 Handling phone calls

Handling phonecall activities

Creating phonecall activities

To create a phonecall activity

1. In the Inbox pane toolbar, click the arrow in the **Create activity** button. From the list displayed, select the shortcut you want to use to create the phonecall activity.

   This list can contain shortcuts created for other departments. If such shortcuts use any custom attribute or self-service portal created only for a particular department, then you can't use such shortcuts.

2. In the search window that appears, provide the customer information using which you want to search or create a customer and click the **Go** button. If you provide more than one attributes and one of them is case ID then the search considers the case ID only.

   The search provides a list of matching customers, if there are any.

3. From the list select the existing customer that you are searching for. To confirm that you have selected the correct customer, you can view the customer details before creating the new activity. To view the customer details, click the **View Details** button. In the **View Details** window check the customer details, and click the **Yes** button if you want to use this customer to create the new activity, or click the **No** button to go back to the search window.

4. If the customer doesn't already exist, then select the option **Create a new customer for this activity**, and click the **OK** button.

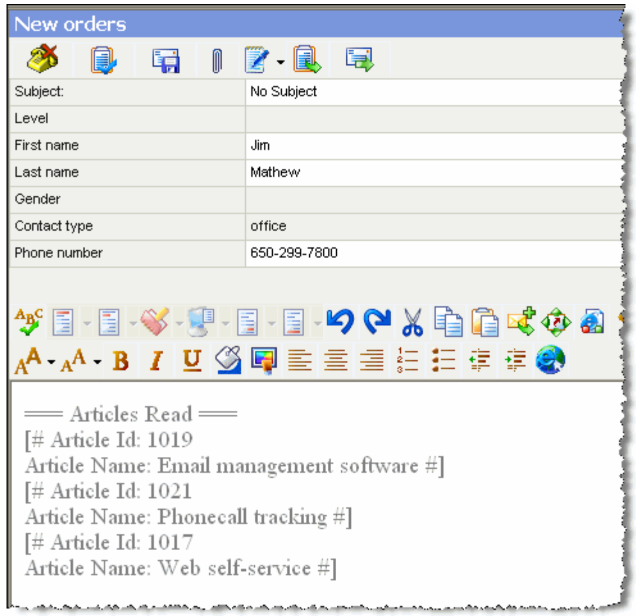
   Once you click the **OK** button the call log pane and the Information pane maximize to cover your work area. The Information pane shows the section that is configured for the particular activity type. And, the call log pane shows the customer information that is configured for the particular activity type.

Logging the call

To log a call

1. In the call log pane, in the text editor take notes of the call.

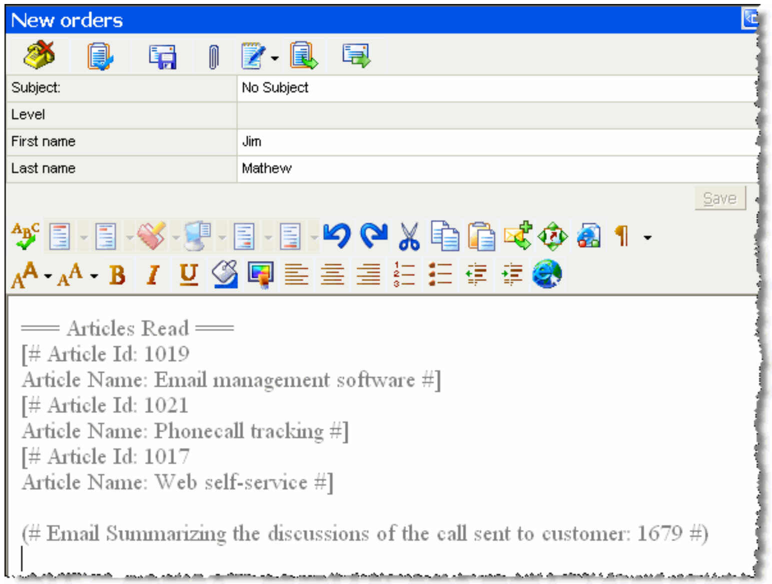
2. While handling the call, if you use any KB article to answer the customers query, you can add that article to the call log by clicking the **Add article to reply** button, in the toolbar. This adds the article ID and article name to the call log pane.



3. Also, if the setting **Allow classification to be added as text on reply pane for phone type activities** is enabled, then any classification associated with the activity type, or with the articles added to the call log, or the classification associated manually with the activity, automatically gets added in the call log.

4. And, while handling the call if you create another activity associated with the same case, then a note is added automatically to the call log indicating that a new activity was created. This happens only when the setting **Allow related activity details to be added as text on reply pane for phone type activities** is enabled.

5. Finally, if you send the call transcript email to the customer, then a note is added to the call log along with the activity ID of the email sent to the customer.



Updating customer information

To update the customer information

1. In the call log pane edit the customer information. If a field has no value, then it can't be edited from the call log pane. To edit such fields you need to go the **Customer** section in the Information pane and change the customer details.
2. After making the changes in the call log pane, click the **Save** button. If, for some reason you don't want to save the recent changes and want to revert to the previously saved changes, then click the **Reset** button. The **Reset** button is enabled only when you make some changes and don't click the **Save** button.

Sending phonecall transcript to the customer

Important: You can send the transcript email only if the Cisco Unified Email Interaction Manager licence is assigned to you.

To send the phonecall transcript to the customer

1. In the call log pane, click the **Send Email** button.

   The call transcript pane appears.
2. In the text editor the call log appears. Make changes to the call log, if required.

3. In the **From** and **To** field check the email addresses.
4. In the call transcript pane toolbar, click the **Send** button to send the transcript email. If you want to send the transcript and along with complete the phonecall activity, then click the **Send and complete** button.

   Once you send the transcript email, a note is added to the call log along with the activity ID of the email sent to the customer.

Transferring phonecall activities

To transfer a phonecall activity

1. In the inbox select the phonecall activity you want to transfer.
2. In the call log pane or Inbox pane toolbar, click the **Transfer** button.

   The **Transfer Activities** window appears.
3. In the **Transfer Activities** windows, select if you want to transfer the phonecall activity to another agent, queue, or a department. From the list of available agents, queues, or departments select the one to which you want to transfer the phonecall activity.

   Before transferring the activity you can change the priority of the activity and can add notes to the activity.
4. To change the priority of the activity select the option, **Change the priority of these activities**, and from the dropdown list select the priority.
5. If you are transferring a pinned activity, then select the option **Transfer pinned activities**, to unpin the activity before transferring.
6. If you don't want the activity to be re-assigned to you by the system, then uncheck the option, **Allow these activities to be re-assigned to me by the system**.
7. Lastly, if you want to add a note to the activity, click the **Add Notes** button and in the **Add Note** window that appears add the note and click the **OK** button.
8. Click the **Transfer** button to transfer the activity.

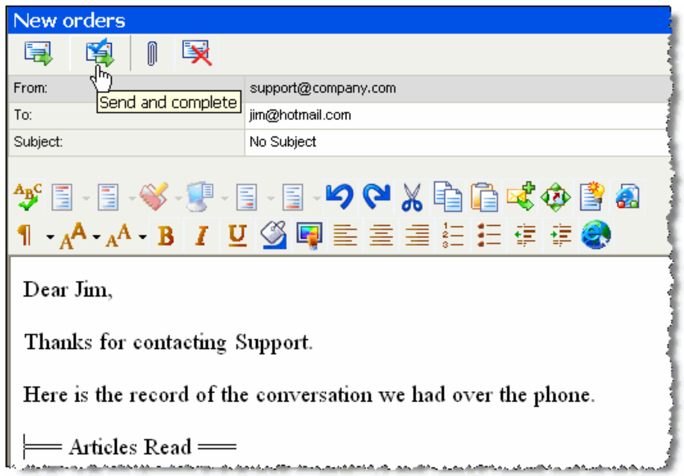
Completing phonecall activities

To complete a phonecall activity

1. In the call log pane click the **Complete** button. This completes the phonecall activity.

2. If you don't want to complete the activity, but want to assign it to the system for some further processing, then click the **Done** button.

3. You can also complete a phonecall activity by clicking the **Send and complete** button in the call transcript pane. This sends the call transcript email to the customer and completes the phonecall activity.



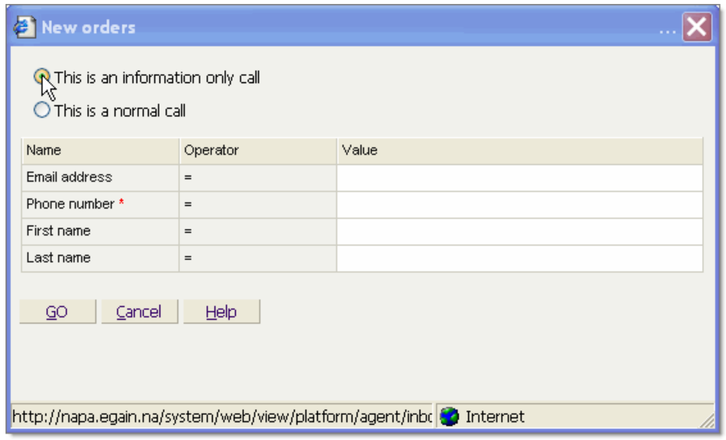
Creating information only calls

You can create information only calls when a customer calls in for some type of enquiry. For information only calls no case and customer is created.

To create an information only call

1. In the Inbox pane toolbar, click the arrow in the **Create activity** button. From the list displayed select the shortcut you want to use to create the phonecall activity.

2. In the search window that appears, select the option **This is an information only call** and click the **GO** button.



Once you click the **GO** button the Information pane maximize to cover your work area. The Information pane shows the section that is configured for the particular activity type.

Using self-service portal

From the Information pane you can use the self-service portal to answer the customers queries.

You can use self-service portal only if the KnowledgeAgent licence is assigned to you. And the Guided help link in the self-service portal is available to only the agents who have the KnowledgeAgent Advanced licence.

To use the self-service portal

1. In the Information pane section toolbar, select the self-service portal you want to you.
2. Browse through the articles in the self-service portal and use the articles to answer the customer queries.

   Whenever you use an article to answer the customer query, you can quickly add that article's details to the call log pane.
3. In the self-service portal click the **Article used for response** button to add the article ID and name to the call log pane.

4. Also, if the setting **Allow classification to be added as text on reply pane for phone type activities** is enabled, then any classification associated with the articles added to the call log pane, automatically gets added in the call log.