



## **Cisco Unified Web and E-Mail Interaction Manager Tools Console User's Guide**

**For Unified Contact Center Express**

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# Preface

- ▶ [About this guide](#)
- ▶ [Document conventions](#)
- ▶ [Other learning resources](#)

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

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*Cisco Unified Web and E-Mail Interaction Manager Tools Console User’s Guide* introduces you to the Tools Console and helps you understand how to use it to configure and extend business objects.

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

## Document conventions

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This guide uses the following typographical conventions.

Convention	Indicates
<i>Italic</i>	Emphasis, or the title of a published document.
<b>Bold</b>	Labels of items on the user interface, such as buttons, boxes, and lists. Or, text that must be typed by the user.
<b>Monospace</b>	A file name or command. Or, text that must be typed by the user.
<i>Variable</i>	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 <i>Cisco Unified Web and Email Interaction Manager Help</i> ; 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*



# 1

## Console basics

- ▶ [Key terms and concepts](#)
- ▶ [Elements of the user interface](#)

A highly specialized workspace for business analysts and programmers, Tools Console lets you configure Cisco Business Objects according to the needs of your organization. This console even lets you extend business objects by creating custom attributes and values. You can also customize screens through this console.

## Key terms and concepts

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Here are some of the key terms and concepts used in Tools Console.

### System Settings

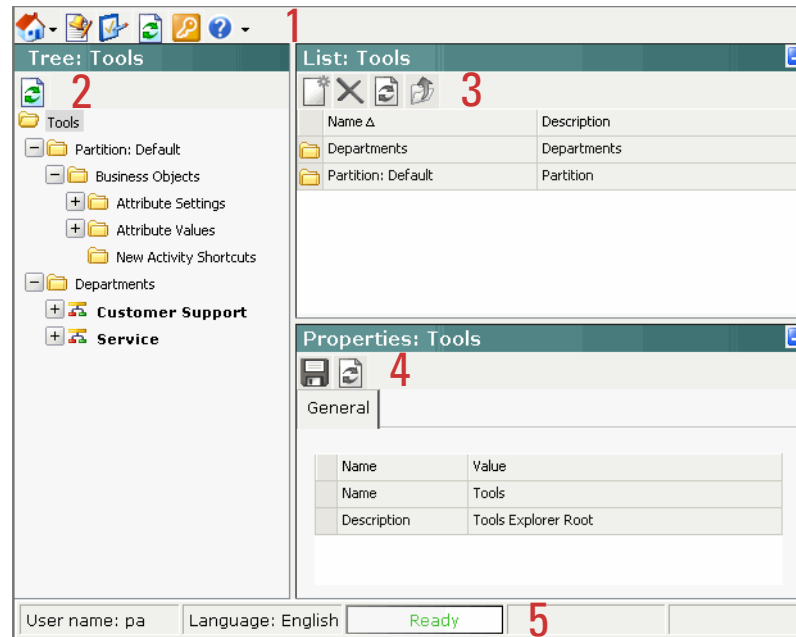
System Settings let you configure business objects for the entire system. Business objects, such as customer or user data, consist of numerous attributes. Based on the needs of your business, you can define the scope of an object by configuring which attributes to make available. You can also extend the objects in the system by adding custom attributes and values.

### Screen Settings

Screen Settings give you the flexibility to customize various screens according to your business needs. For each department you can customize some screens. You can enable, restrict, or reorder the attributes that can be viewed in these screens. You can also customize the Information pane of the Agent Console by adding, removing, or changing the order of the section toolbar buttons.

# Elements of the user interface

To get to know the console user interface better, let us begin by dividing it into five functional areas:



Elements of the console user interface

1. **Console toolbar:** The main toolbar of the console appears at the top of the screen. It provides quick access to commonly performed actions such as “refresh,” “view Help,” and “log out.”
2. **Tree pane:** The Tree pane presents the contents of your work area as a tree list, allowing you to select the node (folder) that you wish to work in. When you select a folder, its first-level contents are displayed in the List pane.

To expand all first and second level nodes with a single click, shift + click the plus [+] button next to the topmost node. The contents of all first and second level nodes are displayed in the Tree pane.

3. **List pane:** The List pane displays first-level contents of the folder selected in the Tree pane. You can view the name, description, date of creation, etc., of displayed items. In this pane, you can create items or select existing ones to modify or delete them.
4. **Properties pane:** The Properties pane displays the contents of the folder or article selected in the List pane. In this pane, you can edit the properties of the selected item.

5. **Status bar:** The status bar is present at the bottom of every screen. It displays the following information:
  - The user name with which the user has logged in to the system.
  - The language currently in use.
  - The status of the system (Loading, Ready, etcetera).



# Custom attributes

- ▶ [About business objects](#)
- ▶ [Creating custom attributes](#)
- ▶ [Adding custom attributes to screens](#)
- ▶ [Creating macros for custom attributes](#)

## About business objects

---

You can customize the business objects by adding custom attributes. You can add custom attributes to the following business objects.

- ▶ Activity data
  - Activity search data
  - Generic activity data
- ▶ Case data
  - Case search data
- ▶ Contact person data
  - Contact person search data
- ▶ Contact point data
  - Contact point search data
  - Email address contact point data
  - Phone number data
  - Postal address data
  - Web site data
- ▶ Customer association data
  - Customer association search data
- ▶ Customer data
  - Customer search data
  - Change customer data
  - Cooperate customer data
  - Group customer data
  - Individual customer data
- ▶ Customer group data
- ▶ Customer organization data
- ▶ KB article data
  - Article search data
  - Article summary for version and pending
- ▶ Routing queue
- ▶ User data
  - User search data

# Creating custom attributes

---




**Important:** Once you create a custom attribute it cannot be deleted and its properties cannot be changed.

---

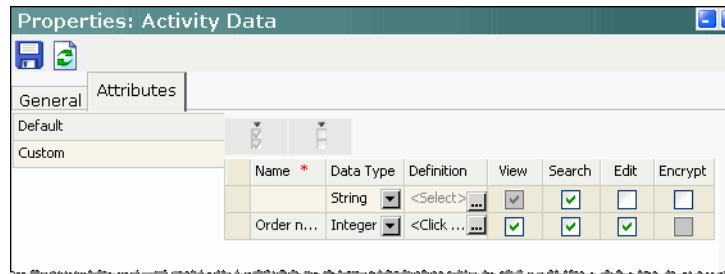
## To add a custom attribute

1. In the Tree pane, browse to **Tools** > *Partition name* > **Business Objects** > **Attribute settings** > **System**.
2. In the List pane, select the business object to which you want to add a custom attribute. You can add custom attributes to 11 business objects.

In the Properties pane, the Attributes tab is selected automatically.

3. In the Attributes tab go to the Custom section and provide the following details.
  - **Name:** Type a name for the custom attribute.
  - **Data Type:** Select the type of data for the custom attribute. The options available are **String and Integer**.
  - **Definition:** Click the **Assistance**  button. In the Define Custom Attribute window, different options are available for the integer and string data type. For integer data type, the data size nine is specified and it can't be changed. You can provide a default value for this field. For string data type, provide the following details.
    - i. Data size: You can specify the maximum characters the custom attribute can have. The default value is eight. You can give a value between one and 4000. For example, if you give a value 10, then you cannot enter data exceeding 10 characters, in the custom field.
    - ii. String type: This option gives you the flexibility to define how the data can be entered in the custom field. You have two options available:
      - User specified in a text box: You can provide an empty field where the user can type any data. You can also give a default value for the field.
      - User-selected in the list of choice below: Provide a list of possible values, from which the user can select one. You can specify a default value for the field. Also, you can allow users to select multiple values from the list.
  - **View:** Select this option if you want to show this attribute in the screens at the department level.
  - **Search:** This feature is not available yet.
  - **Edit:** Select this option if you want to allow the agents to edit this field.

- **Encrypt:** This option is enabled only if the data type selected is string.



Create a custom attribute

4. Click the **Save**  button.

## Adding custom attributes to screens

After creating the custom attributes make sure you add them to the screens where you want them to show in the system. For details on how to add custom attributes to the screens see the section on “Configuring screen attributes for departments” on page 35. And for a list of screens to which you can add the attributes, see the appendix.

## Creating macros for custom attributes

You can create macros for the custom attributes added to some of the business objects. For details, see *Cisco Unified Web and E-mail Interaction Manager Administration Console User's Guide*.





# Custom values

- ▶ [Creating custom values](#)
- ▶ [Creating custom product types](#)
- ▶ [Creating custom activity types](#)

According to your business needs, you can add custom values to the following attributes of the business objects.

- ▶ Activity mode
- ▶ Activity type
- ▶ Activity status
- ▶ Case status
- ▶ Customer contact person type
- ▶ Customer country
- ▶ Customer group type
- ▶ Customer industry
- ▶ Customer level
- ▶ Customer organization type
- ▶ Customer region
- ▶ Customer web type
- ▶ Contact person ID type
- ▶ Currency type
- ▶ Product type
- ▶ User type
- ▶ User unavailability reason
- ▶ Web templates session entries

### Things to note


- ▶ Once you save the custom value, the activity type, or its subtypes cannot be deleted. But you can add new subtypes to the custom values later.
- ▶ For product type you can make the subtypes active or inactive.

## Creating custom values

---

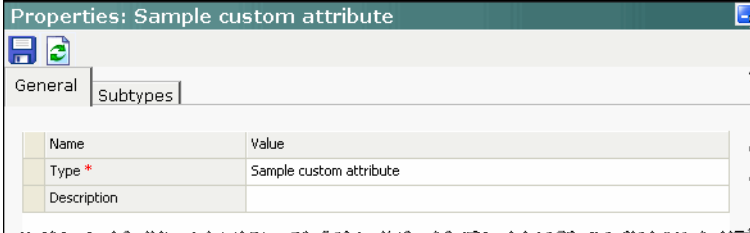
### To create a custom value

1. In the Tree pane, browse to **Tools** > *Partition name* > **Business Objects** > **Attribute values**.
2. Select the business object attribute to which you want to add a custom value.

3. In the List pane toolbar, click the **New**  button.

The Properties pane refreshes to show the properties of the new attribute value.

4. In the Properties pane, go to the General tab and provide the following details.
  - **Type:** Type a name of the new attribute value.
  - **Description:** Type a brief description.

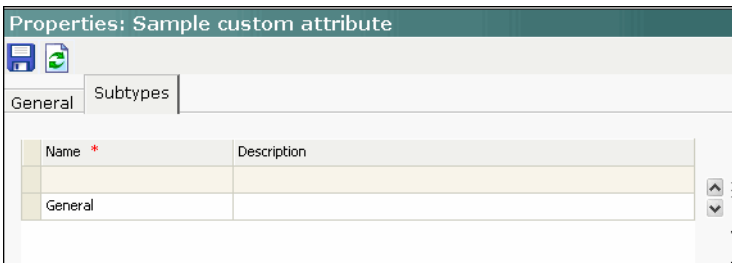


Name	Value
Type *	Sample custom attribute
Description	

Set the general properties

5. Next, go to the Subtype tab, and provide the following details.
  - **Name:** Type a name of the subtype.
  - **Description:** Type a brief description.

Press the ENTER key, and create additional subtypes.



Name *	Description
General	

Create a new subtype

6. Click the **Save**  button.


## Creating custom product types

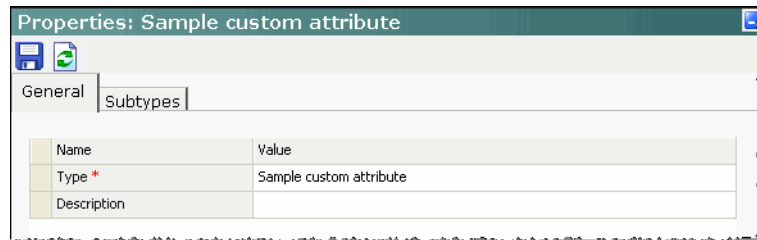
There are five predefined product types created in the system. They are:

- ▶ Credit Cards
- ▶ Finance
- ▶ Physical
- ▶ Software

- ▶ Wireless

### To create a custom product type

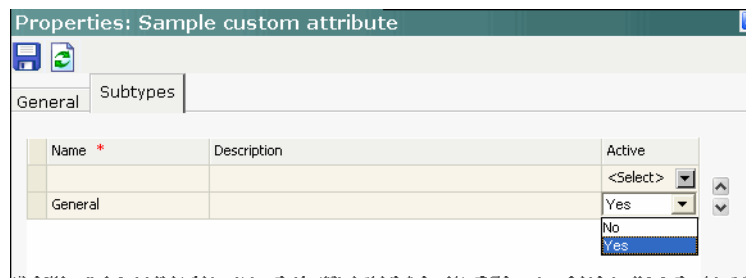
1. In the Tree pane, browse to **Tools** > *Partition name* > **Business Objects** > **Attribute values** > **Product: Type**.
2. In the List pane toolbar, click the **New**  button.  
The Properties pane refreshes to show the properties of the new attribute value.
3. In the Properties pane, go the General tab and provide the following details.
  - **Type:** Type a name of the new attribute value.
  - **Description:** Type a brief description.



Set the general properties

4. Next, go to the Subtype tab and provide the following details.
  - **Name:** Type a name of the subtype.
  - **Description:** Type a brief description.
  - **Active:** Select **Yes** to make the product subtype active. Only active subtypes are available for use in the system.

Press the ENTER key and create additional subtypes.



Create a new subtype


5. Click the **Save**  button.

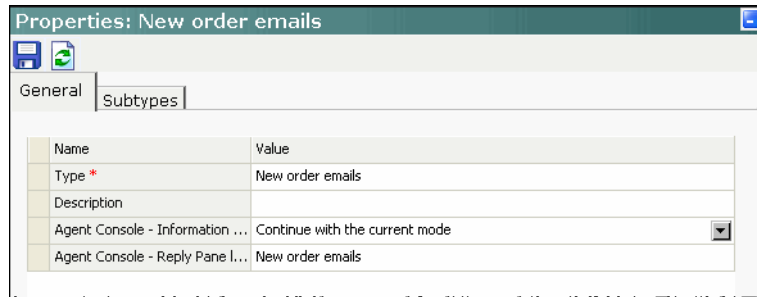
## Creating custom activity types

There are four predefined activity types created in the system. They are:

- ▶ Chat
- ▶ Email
- ▶ Phone
- ▶ Task

### To create a new activity type

1. In the Tree pane, browse to **Tools** > *Partition name* > **Business Objects** > **Attribute values** > **Activity: Type**.
2. In the List pane toolbar, click the **New**  button.
3. In the Properties pane, go to the General tab and provide the following details.
  - **Type:** Type the name of new activity type.
  - **Description:** Type a brief description.
  - **Agent Console - Information pane section:** From the dropdown select the information pane section that should open when the agent creates the activity.
  - **Agent Console - Reply pane label:** Type a label for the Reply pane.

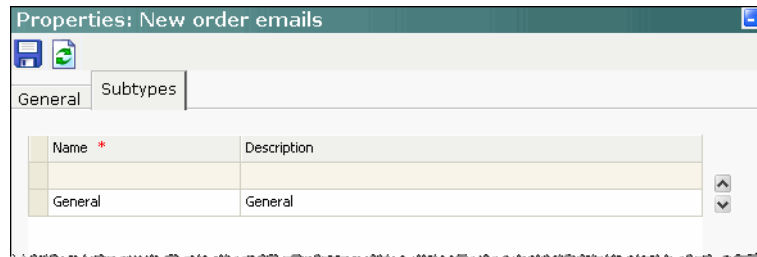


Name	Value
Type *	New order emails
Description	
Agent Console - Information ...	Continue with the current mode
Agent Console - Reply Pane I...	New order emails

Set the general properties

4. Next, go the Subtypes tab. Here you can create the subtypes of the new activity type. A predefined subtype, **General** is created for the activity type and it cannot be deleted. In addition to it you can add more subtypes.
  - **Name:** Type a name for the subtype.
  - **Description:** Type a brief description.

Press the ENTER key and create additional subtypes.



Create a new activity subtype

5. Click the **Save**  button.



**Important:** Once you save the custom value, the activity type, or its subtypes cannot be deleted.

## Associating classifications to activity types

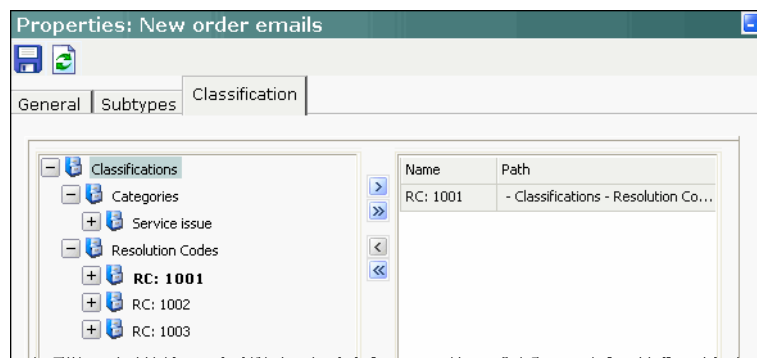
For each department you can associate different classifications to the activity types. Whenever the agent creates a new activity of this type, the classifications associated with the activity type will be assigned to the activity.

### To associate classifications to activity type

1. In the Tree pane, browse to **Tools > Department > Your Department > Activity: Type**.
2. In the List pane select the activity type with which you want to associate a classification.

The Properties pane refreshes to show the properties of the activity type.

3. In the Properties pane, go to **Classifications** tab and select the resolution code and category you want to assign to the activity type.



Assign categories and resolution codes

4. Click the **Save**  button.



# Customer associations

- ▶ [Configuring customer associations](#)
- ▶ [Deleting customer associations](#)



# Configuring customer associations


---

The system comes with a set of predefined customer associations. They are:

- ▶ Accounts: Predefined subtypes are saving, checking, and policy
- ▶ Contracts: Predefined subtypes are license, professional services, and non disclosure
- ▶ Products: You need to create the product catalog from the Administration Console.

## To create a custom customer association

You can create custom customer associations at the department level.

1. In the Tree pane, browse to **Tools > Departments > *Your department* > Business Objects > Relationships > Customer Associations**.
2. In the List pane toolbar, click the **New**  button.

The Properties pane refreshes to show the properties of the new customer association.

3. In the Properties pane, go to the General tab and provide the following details.
  - **Name:** Type a name of the customer association.
  - **Description:** Type a brief description.
  - **Articles:** Select **Yes** if you want to allow agents to add articles to customer associations. By default **No** is selected.
  - **Attachments:** Select **Yes** if you want to allow agents to attach attachments to customer associations. By default **No** is selected.
  - **Notes:** Select **Yes** if you want to allow agents to add notes to the customer association. By default **No** is selected.
  - **Source for association subtypes:** From the dropdown select the source for association subtypes. There are two options available:
    - **Product catalog**
    - **Subtype list**

- **Active:** Select **Yes** if you want to make the customer association active. Only active customer associations are available to agents in the Agent Console.

Name	Value
Name *	Accounts
Description	Accounts Description
Articles	Yes
Attachments	Yes
Notes	Yes
Source for association subtypes	Subtype list
Active	Yes

Set the general properties

4. Next, go to Subtypes tab and provide the following details.




**Important:** The Subtype tab is enabled only if you select the source for association subtype as Subtype list.

- **Name:** Type the name of the subtype.
- **Description:** Type a brief description.
- **Active:** Select **Yes** if you want to make the subtype active or not. Only active subtypes are available to agents in the Agent Console.

Name *	Description	Active
		<Select>
Saving	Saving Description	Yes
Checking	Checking Description	Yes
Policy	Policy Description	Yes

Create subtypes

5. Lastly, go to the Relationships tab and select the customer association to be associated with the customer association you are creating.
6. Click the **Save**  button.

# Deleting customer associations


---

## To delete a customer association



**Important:** The predefined customer associations cannot be deleted.

---

1. In the Tree pane, browse to **Tools > Departments > *Your department* > Business Objects > Relationships > Customer Associations**.
2. In the List pane, select the customer association you want to delete.
3. Click the **Delete**  button in the List pane toolbar.
4. A message appears, asking to confirm the deletion. Click **Yes** to delete the selected customer association.



# Screen attribute settings

- ▶ [About customizing screens](#)
- ▶ [Configuring information pane section toolbar](#)
- ▶ [Configuring screen attributes for departments](#)
- ▶ [Configuring screen attributes for users](#)

## About customizing screens

---

Tools Console provides you with the flexibility to customize various screens according to your business needs. For each department you can customize about 168 screens. You can enable, restrict, or reorder the attributes that can be viewed in these screens. You can also customize the Information pane section toolbar of the Agent Console by adding, removing, or changing the order of the section toolbar buttons. The customization of Information pane section toolbar can be done only at the partition level. The changes made at the partition level, take affect throughout the system.

## Configuring information pane section toolbar

---

The system consists of 11 predefined information pane section toolbar buttons. Out of them, eight are available to all the agents and three are available to only the agents with specific licenses.

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

You can make the following changes to the buttons of the Information pane section toolbar of the Agent Console.

- ▶ Change the order of buttons
- ▶ Remove buttons

- ▶ Add custom buttons
- ▶ Change the shortcut keys for buttons



**Important:** These changes are made at the partition level and take affect throughout the system.

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## Changing the order of buttons

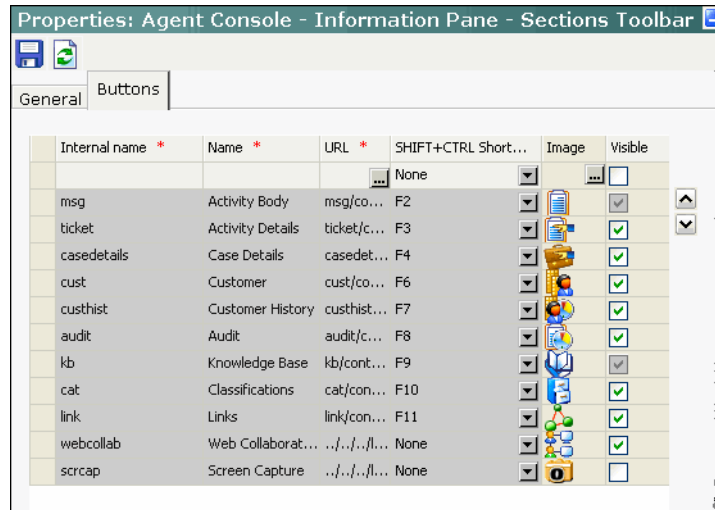
The default order of buttons is:

1. Activity Body
2. Activity Details
3. Case details
4. Customer
5. Customer History
6. Audit
7. Knowledge Base
8. Classification
9. Links
10. Web Collaboration
11. Screen Capture

### To change the order of buttons

1. In the Tree pane, browse to **Tools > Partition name > Business Objects > Attributes Settings > Screen > Toolbar**.
2. In the List pane select, **Agent Console - Information Pane - Sections Toolbar**.  
In the Properties pane, the Buttons tab is selected automatically. It shows a list of the Information pane toolbar buttons.

3. In the **Buttons** tab, select the button you want to move up or down the order, and click the **Move up** or **Move down** button.



Change the order of buttons

4. Click the **Save**  button.

## Removing buttons

You can remove buttons from the information pane section toolbar, if agents don't use them or you don't want them to use.

### Things to note

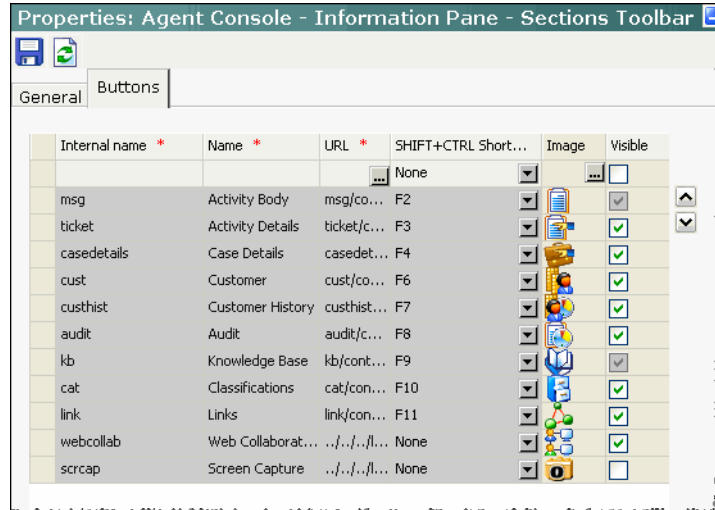
- ▶ The **Activity Body** and **Knowledge Base** buttons cannot be removed.
- ▶ The changes are made at the partition level and take affect throughout the system.

### To remove a button

1. In the Tree pane, browse to **Tools > Partition name > Business Objects > Attributes Settings > Screen > Toolbar**.
2. In the List pane select, **Agent Console - Information Pane - Sections Toolbar**.

In the Properties pane, the Buttons tab is selected automatically. It shows a list of the Information pane toolbar buttons.

3. In the Buttons tab, in the **Visible** field, clear the option for the buttons you want to remove from the Information pane section toolbar of the Agent Console.



Show or hide buttons

4. Click the **Save** button.

## Adding custom buttons

Before adding the buttons to the Information pane section toolbar, you need to first create the buttons and add them to the custom folder on the file server.

### Creating custom buttons

#### To create a button

1. First, create a button of size 24 x 24 pixels and save it as a GIF file (.gif).
2. Then, go to the file server and add the button to the custom folder at the following location.

*Server\_Name\CIM\_Home\web\image\platform\custom*

The added image becomes available in the Tools Console for adding in the Information pane section toolbar.

### Adding custom buttons to the information pane section toolbar



#### To add a button



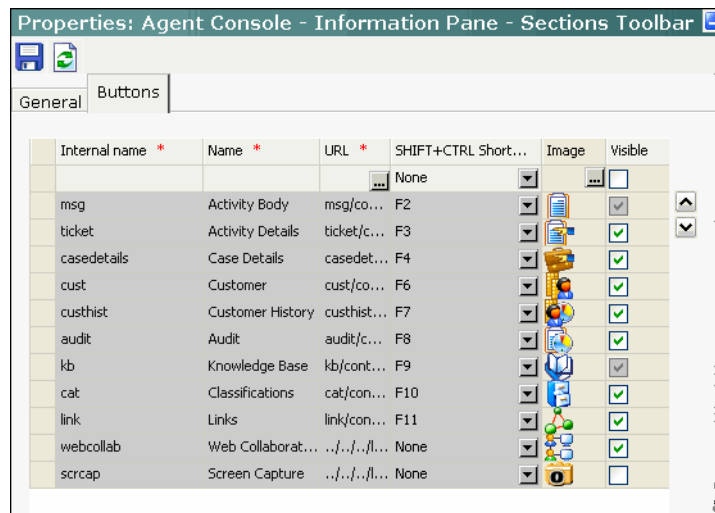
1. In the Tree pane, browse to **Tools > Partition name > Business Objects> Attributes Settings > Screen > Toolbar.**
2. In the List pane select, **Agent Console - Information Pane - Sections Toolbar.**  
In the Properties pane, the Buttons tab is selected automatically. It shows a list of the Information pane section toolbar buttons.
3. In the Buttons tab, provide the following details.
  - **Internal name:** Type the internal name of the button.



**Important:** The internal name cannot have only digits, and you can't use spaces in the internal name.

- **Name:** Type the name of the button as it should appear in the Agent Console.
- **URL:** Click the **Assistance**  button. In the Configure A Toolbar Section window, type the URL of the website or file that you want to access using this button. You can give the URL of a website such as *http://www.company.com.*
- **SHIFT+CTRL shortcut:** Select a shortcut key for the button.
- **Image:** Click the **Assistance**  button. From the Image window, select the image you want to use for the button and click the **OK** button.
- **Visible:** Select the option if you want to make the button visible in the Information pane, in the Agent console.

After providing all the values, press the ENTER key.



Add a new button


4. Click the **Save**  button.

## Deleting custom buttons



**Important:** The predefined buttons cannot be deleted.

### To delete a custom button

1. In the Tree pane, browse to **Tools > Partition name > Business Objects > Attributes Settings > Screen > Toolbar**.
2. In the List pane select, **Agent Console - Information Pane - Sections Toolbar**.  
In the Properties pane, the Buttons tab is selected automatically. It shows a list of the Information pane toolbar buttons.
3. Select the button you want to delete and press the DELETE key.  
The selected button is deleted.
4. Click the **Save**  button.

## Changing shortcut keys for buttons

The shortcut keys can provide quick and easy access to various sections of the Information pane section toolbar. Shortcut keys help to reduce the number of clicks saving your agents time. For example, you assign the shortcut key F4 to the Activity Body button, the agent can quickly access the Activity Body section using the shortcut key Ctrl + Shift + F4.


You can change the shortcut keys for the predefined buttons and also the custom buttons.

### Things to note

- ▶ You can use one of the following function keys in the shortcut key.
  - F2
  - F3
  - F4
  - F6
  - F7
  - F8
  - F9
  - F10
  - F11
  - F12

- ▶ The same function key cannot be assigned to multiple buttons.
- ▶ For the ease of the agents make sure that you don't change the shortcut keys too often because the agents would have to unlearn and learn the shortcut keys again and again. And, if you do need to change them any time, as a best practice you can notify them about the changes, so that they are aware of them.

### To change the shortcut keys of the buttons


1. In the Tree pane, browse to **Tools > Partition name > Business Objects > Attributes Settings > Screen > Toolbar**.
2. In the List pane select, **Agent Console - Information Pane - Sections Toolbar**.  
In the Properties pane, the Buttons tab is selected automatically. It shows a list of the information pane section toolbar buttons.
3. In the Buttons tab, in the **Ctrl + Shift shortcut** field, select the function key you want to assign to the button.
4. Click the **Save**  button.

## Configuring screen attributes for departments

---

For each department, you can customize 168 screens. You can specify which attribute you want to show in the screens and the order in which they should appear. In all the screens there are some attributes which cannot be removed from them.

### To customize a screen

1. In the Tree pane, browse to **Tools > Departments > Your Department > Business Objects > Attribute Settings > Screen**.
2. In the List pane, select the screen you want to customize. For a list of screens that can be modified see the Appendix.
3. In the Properties pane, go to the Attributes tab and do the following.
  - a. Select the attributes you want to add to the screen.
  - b. In the selected attributes list, specify if you want display the attribute or not.
  - c. Also, you can change the order of the attributes. Select the attribute you want to move up or down the order and click the Move up or Move down button.
4. Click the **Save**  button.

## Configuring screen attributes for users

---

These are department specific settings. They let you restrict or allow a particular user to view or edit a particular attribute of a business object. Using this tool, you can control the level of access a user has in the system.

You can create multiple user attribute settings for various users depending on the expected level of their functioning. For example; a normal user in the system will not have the level of access similar to his supervisor.

Agent, manager, supervisor, etc., can be user attribute settings with different access levels determined in the system. Whenever a new user is created in the system, the administrator can assign one of the pre-determined user attribute settings to the user to function accordingly.



# New activity shortcuts

- ▶ [Preparing for creating new activity shortcuts](#)
- ▶ [Creating new activity shortcut](#)
- ▶ [Deleting new activity shortcuts](#)

## Preparing for creating new activity shortcuts

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Before creating the new activity shortcut:

- ▶ Create the custom activity types for which you want to create new activity shortcuts.
- ▶ Create the activity modes you want to use for the new activity shortcuts.
- ▶ Create the custom attributes you want to use in the new activity shortcut. You can use the custom attributes added to the business objects customer, contact point, and contact person.
- ▶ For the custom attributes you use in the new activity shortcut, make sure that you make them visible at the department level. You need to add the custom attributes to the following screens.
  - Contact point: Search contact point criteria relationship name
  - Contact person: Search contact person criteria relationship name
  - Customer: Search customer criteria relationship name

If you don't add the custom attributes to the screens at the department level, then the agents of that department will not be able to use the new activity shortcut.

## Creating new activity shortcut


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The partition administrator can create new activity shortcuts from the Tools Console. The new activity shortcuts are created at the partition level and are available to all the agents in all the departments.

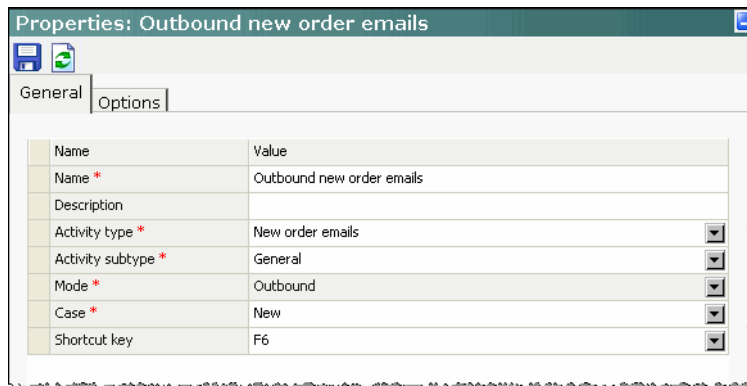
The predefined shortcuts are:

- ▶ Outbound email for current case
- ▶ Outbound email for new case
- ▶ Outbound email with no case

### To create a new activity shortcut

1. In the Tree pane, browse to **Tools** > *Partition name* > **Business Objects** > **New Activity Shortcuts**.
2. In the List pane toolbar, click the **New**  button.
3. In the Properties pane, go to the General tab and provide the following details.

- **Name:** Type a name of the new activity shortcut. Use a name that clearly indicates what the activity shortcut is for, so that the agents can identify them easily.
- **Description:** Type a brief description.
- **Activity type:** Select the activity type for which you want to create a shortcut.
- **Activity subtype:** Select the activity subtype.
- **Mode:** Select the activity mode. The options available are, inbound, outbound, and none. You can add custom modes to this list. For details see the chapter on “Custom values” on page 17.
- **Case:** Specify if you want to create a new case for the activity created using the new activity shortcut. The options available are:
  - **Current:** The case of the currently selected activity in the inbox is assigned to the new activity being created.
  - **New:** A new case is created for the activity.
  - **None:** No case is created to the activity.
- **Shortcut key:** Select a shortcut key for the new activity shortcut. You can assign a FUNCTION KEY from F2, F3, F4, F6, F7, F8, F9, F10, and F12. Select **None** if you don't want to assign a shortcut key to the new activity shortcut. For the ease of the agents make sure that you don't change the shortcut keys too often because the agents will have to unlearn and learn the shortcut keys again and again. And, if you do need to change them any time, as a best practice you can notify them about the changes so that they are aware of them and are prepared for it.



Set the general properties

4. Next, go to the Options tab and configure the attributes the agent should be asked to provide for creating new activities. To accurately identify the customer on the phone, multiple search attributes can be provided.



**Important:** The Options tab is enabled only if in the General tab you select the case as new or none.

---

- Select the attribute that the agent should be asked to provide when this new activity shortcut is used. The following attributes of the business objects are available.
  - **Case:** Case ID
  - **Contact point:** Email address, phone number, complete address, URL
  - **Customer:** Customer name, level
  - **Contact person:** First name, middle name, last name

You can also use the custom attributes added to the business objects contact point, contact person, and customer.



**Important:** If you are using any custom attributes in the new activity shortcut, make sure you add them to the screens at the department level.

---

- For the selected attributes specify the following.
  - **Operator:** The options available are, =, !=, >, <, begins with, contains, does not contain, and ends with. For case ID only the operator EQUAL TO (=) can be used.
  - **Required:** At least one attribute should be marked as required.
  - **Boolean:** Select from the boolean AND and OR.



**Important:** For best performance on searching these attributes they should be indexed in the database. Please contact your system administrator or database administrator for steps to index the specific attributes in the database.

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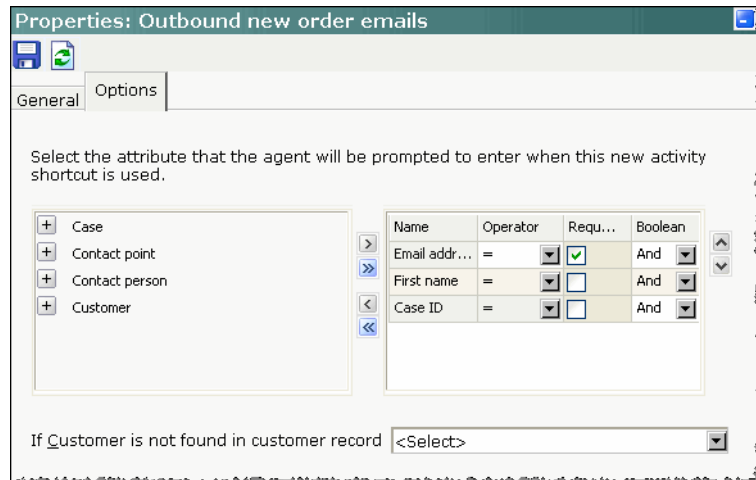
- **If customer is not found in customer record:** There are three options available:
  - **Create a customer and continue**
  - **Do not create a customer and continue**
  - **Show an error message**



**Important:** This option is available only if you select the attribute, email address.

---






5. Click the **Save**  button.

## Deleting new activity shortcuts

### To delete a new activity shortcut

1. In the Tree pane, browse to **Tools** > *Partition name* > **Business Objects** > **New Activity Shortcuts**.
2. In the List pane, select the new activity shortcut you want to delete.
3. In the List pane toolbar, click the **Delete**  button.

# Appendix: Reference information

- ▶ [Custom attributes](#)
- ▶ [Customizable screens](#)
- ▶ [Editable screens](#)
- ▶ [Predefined attribute values](#)

## Custom attributes

---

You can add custom attributes to the following business objects.

1. Activity data
  - Activity search data
  - Generic activity data
2. Case data
  - Case search data
3. Contact person data
  - Contact person search data
4. Contact point data
  - Contact point search data
  - Email address contact point data
  - Phone number data
  - Postal address data
  - Web site data
5. Customer association data
  - Customer association search data
6. Customer data
  - Customer search data
  - Change customer data
  - Cooperate customer data
  - Group customer data
  - Individual customer data
7. Customer group data
8. Customer organization data
9. KB article data
  - Article search data
  - Article summary for version and pending
10. Routing queue
11. User data
  - User search data

## Customizable screens

---

### Activity data

1. Admin workflow alarm activity
2. Admin workflow condition
3. Admin workflow modify object
4. Agent activity body chat general
5. Agent activity detail name
6. Agent activity details chat general
7. Agent activity details web activity general
8. Agent case details activity details name
9. Agent case details activity list name
10. Agent close case name
11. Agent customer history activity details
12. Agent customer history activity list
13. Agent inbox activity list
14. Agent inbox chat activity list
15. Agent monitor inbox chat activity list
16. Agent pull activity screen
17. Agent reply properties
18. Agent transfer activity name
19. Search customer activity result name

### Activity search data

1. Search activity criteria relationship name
2. Search customer service activity criteria advanced
3. Search customer service activity criteria basic

## **Generic activity data**

1. Agent activity body task general
2. Agent activity details phone general
3. Agent activity details task general
4. Agent activity body <custom activity type> general
5. Agent activity details <custom activity type> general
6. Agent reply <custom activity type> general

## **KB article data**

1. Agent KB article property
2. KB article general property
3. Q & A search solutions
4. Search customer article result name
5. Search knowledge article criteria result name
6. Web templates -configurations article attributes

## **Article search data**

1. Search customer article advanced criteria name
2. Search customer article criteria name
3. Search knowledge article criteria advanced name
4. Search knowledge article criteria basic name

## **Article summary for version and pending**

1. Agent KB pending article list
2. KB article all version list

## Case data

1. Admin workflow alarm case
2. Admin workflow condition
3. Admin workflow modify object
4. Agent case details case details name
5. Agent case details related cases name
6. Agent customer history case details
7. Agent customer history case list
8. Agent inbox case list
9. Search customer service case result

## Case search data

1. Search case criteria relationship name
2. Search customer service case criteria advanced
3. Search customer service case criteria basic

## Contact person data

1. Admin workflow condition
2. Admin workflow modify object
3. Agent customer details contact person details
4. Agent customer details contact person list
5. Agent inbox activity list
6. Agent inbox chat activity list
7. Agent monitor inbox chat activity list
8. Search contact person result name

## **Contact person search data**

1. Search contact person criteria advanced name
2. Search contact person criteria basic name
3. Search contact person criteria relationship name
4. Search contact point result name

## **Contact point data**

1. Agent customer details contact point list
2. Search contact point result name

## **Email address contact point data**

- ▶ Agent customer details contact point details for email

## **Phone number data**

- ▶ Agent customer details contact point details for phone

## **Postal address data**

- ▶ Agent customer details contact point details for postal

## **Web site data**

- ▶ Agent customer details contact point details for web

## **Contact point search data**

1. Search contact point criteria basic name
2. Search contact point criteria relationship name
3. Search contact point criteria advanced name

## Customer association data

1. Agent customer association details
2. Agent customer association list
3. Customer accounts details
4. Customer contract details
5. Customer product details

## Customer association search data

1. Search association types criteria relationship name
2. Search customer service association types criteria basic

## Customer data

1. Admin workflow condition
2. Admin workflow modify object
3. Search customer criteria result name
4. Search contact point result name

## Corporate customer data

- ▶ Agent customer detail cooperate customer details

## Group customer data

- ▶ Agent customer detail group customer name

## Individual customer data

- ▶ Agent customer details individual customer name

## Customer search data

1. Search customer basic criteria name
2. Search customer criteria relationship name



## Customer group data

1. Admin workflow condition
2. Admin workflow modify object

## Customer organization data

1. Admin workflow condition
2. Admin workflow modify object

## Routing queue

1. Admin workflow condition
2. Admin workflow queue property general
3. Agent inbox activity list
4. Agent inbox chat activity list
5. Agent monitor inbox chat activity list
6. Agent transfer activity name

## User data

1. Admin user property custom
2. Admin workflow condition
3. Agent transfer activity name
4. Agent monitor inbox chat activity list

## User search data

- ▶ Search admin criteria basic name

## Editable screens

---

1. Admin data usage link group property formatting
2. Admin data usage link property formatting
3. Admin workflow create object
4. Admin workflow queue property media
5. Admin workflow queue property phone media
6. Agent activity body attachment name
7. Agent customer association type list
8. Agent data usage link links
9. Agent KB article folder list
10. Agent reply web activity general
11. Bitmaps
12. CCB phone link list
13. CCB phone link property
14. Content adapter collections
15. Content adapter logging
16. Content adapter performance
17. Content adapters
18. KB article folder list
19. KB article tssevents list
20. KB folder general property
21. KB useful items folder properties
22. Release list
23. Release properties
24. Search attachment criteria relationship name
25. Search contact point 2 criteria relationship name
26. Search customer service classification criteria relationship

27. Search knowledge classification criteria relationship
28. Search knowledge attachment criteria relationship
29. Search knowledge cluster criteria advanced
30. Search knowledge cluster criteria basic
31. Search knowledge cluster criteria results
32. Search knowledge question criteria advanced
33. Search knowledge question criteria basic
34. Search knowledge question results
35. Setting agent console

## Custom attributes available in new activity shortcuts

- ▶ Contact point: Search contact point criteria relationship name
- ▶ Contact person: Search contact person criteria relationship name
- ▶ Customer: Search customer criteria relationship name

## Predefined attribute values

---

### Activity: Mode

1. Inbound
2. Outbound
3. None

### Activity: Type

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

## Activity: Status

1. Assigned
2. Assignment
3. Completed
4. New
5. Pre\_completion
6. Preworkflow
7. Workflow

## Case: Status

1. Closed
2. Open
3. Ready for closure

## Chat: Status

1. Agent not connected
2. Customer exited chat
3. Waiting for customer to reply
4. Waiting for you to reply

## Contact person: ID type

1. License
2. Passport
3. SSN

## Currency: Type

1. Euro
2. UK Pound
3. USD
4. Yen

## Customer: Contact person type

1. Billing
2. Legal
3. Shipping
4. Technical

## Customer: Country

1. Afganistan
2. Albania
3. Algeria
4. Andorra
5. Angola
6. Anguilla
7. Antarctica
8. Antigua and Barbuda
9. APO
10. Argentina
11. Armenia
12. Aruba
13. Australia
14. Austria

15. Azerbaijan
16. Bahamas
17. Bahrain
18. Bangladesh
19. Barbados
20. Belarus
21. Belgium
22. Belize
23. Benin
24. Bermuda
25. Bhutan
26. Bolivia
27. Bosnia AHerzegovina
28. Botswana
29. Bouvet Island
30. Brazil
31. British Industry Ocean Territory
32. British Virgin Islands
33. Brunei
34. Bulgaria
35. Burkina Faso
36. Burundi
37. Combodia
38. Cameroon
39. Canada
40. Cape Verde
41. Cayman Islands

42. Central African Republic
43. Chad
44. Chile
45. China
46. Christmas Island
47. Colombia
48. Cocos Island
49. Comoros
50. Congo
51. Cooks Islands
52. Costa Rica
53. Cote Dlvoire
54. Croatia
55. Cuba
56. Cyprus
57. Czech Republic
58. Denmark
59. Djibouti
60. Dominica
61. Dominican Republic
62. East Timor
63. Ecuador
64. Egypt
65. El Salvador
66. Equatorial Guinea
67. Eritrea
68. Estonia

69. Ethiopia
70. Falkland Islands
71. Faroe Islands
72. Fiji
73. Finland
74. FPO
75. France
76. French Guiana
77. French Polynesia
78. French Sourthern Territories
79. Gabon
80. Gambia
81. Georgia
82. Germany
83. Ghana
84. Gibraltar
85. Greece
86. Greenland
87. Grenasa
88. Guadeloupe
89. Guam
90. Guatemala
91. Guinea
92. Guinea Bissau
93. Guyana
94. Haiti
95. Heard and McDonald Islands



96. Honduras
97. Hong Kong
98. Hungary
99. Iceland
100. India
101. Indonesia
102. Iran
103. Iraq
104. Ireland
105. Israel
106. Italy
107. Jamaica
108. Japan
109. Jordan
110. Kazakhstan
111. Kenya
112. Kiribati
113. Kitts and Nevis
114. Kuwait
115. Kyrgyzstan
116. Laos
117. Latvia
118. Lebanon
119. Lesotho
120. Liberia
121. Libya
122. Liechtenstein

- 123.Lithuania
- 124.Luxembourg
- 125.Macau
- 126.Macedonia
- 127.Madagascar
- 128.Malawi
- 129.Malaysia
- 130.Maldives
- 131.Mali
- 132.Malta
- 133.Marshall Islands
- 134.Martinique
- 135.Mauritania
- 136.Mauritius
- 137.Mayotte
- 138.Mexico
- 139.Micronesia
- 140.Moldova
- 141.Monaco
- 142.Mongolia
- 143.Montserrat
- 144.Morocco
- 145.Mozambique
- 146.Myanmar
- 147.Namibia
- 148.Nauru
- 149.Nepal

150.Netherlands  
151.Netherlands Antilles  
152.New Caledonia  
153.New Zealand  
154.Nicaragua  
155.Niger  
156.Nigeria  
157.Niue  
158.Morfolk Island  
159.North Korea  
160.Northern Mariana Islands  
161.Norway  
162.Oman  
163.Pakistan  
164.Palau  
165.Panama  
166.Papua New Guinea  
167.Paraguay  
168.Peru  
169.Philippines  
170.Pitcairn Island  
171.Poland  
172.Portugal  
173.Puerto Rico  
174.Qatar  
175.Reunion  
176.Romnia

- 177.Russia
- 178.Rwanda
- 179.Saint Helena
- 180.Saint Kitts and Nevis
- 181.Saint Pierre and Miquelon
- 182.Saint Vincent and the Grenadines
- 183.Saint Lucia
- 184.Samoa American
- 185.Samoa Western
- 186.San Marino
- 187.Sao Tome and Principe
- 188.Saudi Arabia
- 189.Senegal
- 190.Seychelles
- 191.Sierra Leone
- 192.Singapore
- 193.Slovakia
- 194.Slovenia
- 195.Solomon Islands
- 196.Somalia
- 197.South Africa
- 198.South Georgia
- 199.South Korea
- 200.Spain
- 201.Sri Lanka
- 202.Sudan
- 203.Suriname

204.Svalbard and Jan Mayen Islands  
205.Swaziland  
206.Sweden  
207.Switzerland  
208.Syria  
209.Taiwan  
210.Tazikistan  
211.Tanzania  
212.Thailand  
213.Togo  
214.Tokelau  
215.Tonga  
216.Trinidad and Tobago  
217.Tunisia  
218.Turkey  
219.Turkmenistan  
220.Turks and Caicos Islands  
221.Tuvalu  
222.Uganda  
223.United Kingdom  
224.Ukraine  
225.United Arab Emirates  
226.United States Minor Outlying Islands  
227.Uruguay  
228.United States  
229.Uzbekistan  
230.Vanuatu

- 231. Vatican City
- 232. Venezuela
- 233. Vietnam
- 234. Virgin Islands
- 235. Walls and Futuna
- 236. Western Sahara
- 237. Yemen
- 238. Yugoslavia
- 239. Zambia
- 240. Zimbabwe

## Customer: Group type

- 1. Association
- 2. Club
- 3. Household
- 4. Joint account
- 5. Membership
- 6. Other

## Customer: Industry

- 1. Finance
- 2. Health care
- 3. Telecom

## Customer: Level

- 1. Gold
- 2. Platinum

3. Premium
4. Silver
5. Standard

## Customer: Organization type

1. Non-profit
2. Other
3. Partnership
4. Private
5. Public
6. Sole-proprietor

## Customer: Region

1. Asia Pacific
2. Europe
3. United States

## Customer: Webtype

1. AOL
2. MSN
3. URL
4. Yahoo

## Product: Type

1. Credit Cards
2. Finance
3. Physical

4. Software
5. Wireless

## User: Type

1. Anonymous user
2. Authenticated agent
3. Authenticated customer
4. Identified agent
5. Identified customer