

# Admin and Setup Guide

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# 1. About Digital Channels

Cisco Finesse is an Agent desktop for Contact Center Enterprise (CCE) customers and can support digital channels – SMS, Email, Livechat, Facebook Messenger, Apple Messages for Business (AMB), and WhatsApp with enhanced capabilities. Digital channels enhance the reach of any business. With changing demographics and individual habits, consumers expect to reach out to a business on the channels of choice—from anywhere, at any time.

## 2. Digital Channel Consoles

The digital channel administration is split into the following areas.

Consoles	Description
Admin console	Administrators can manage tenant-wide configurations for digital channel offerings, such as policies and channel asset configurations.
Customer Care console	Primarily used to access past conversation transcripts and user monitoring capabilities.

### 2.1. Admin Console

The following table describes the Admin Console components.

Component	Description
Dashboard	Displays information on conversations traffic and workforce-related metrics.
Groups	The Groups consist of a default team. The Users can configure triggers to invoke workflows on the back of conversation lifecycle events or manually trigger by your agents to invoke them on-demand during a conversation.
Settings	Enables tenant-wide configuration, such as attachment policies and email-related configuration.
Users	Presents a read-only view of users enabled with access to digital channels.
Assets	Enables configuration of channel assets and response templates (canned responses).

## 2.1.1. Dashboard

The real-time dashboard offers a glimpse into the inbound conversation traffic that the contact center is currently handling.

## 2.1.2. Groups

The Groups menu represents geographical sites. Although you can manage the sites on CCE' Admin, they aren't synced recursively into Webex Engage's Admin Console. By default, the Admin Console has one preconfigured group called Default. The Default group contains all users (admins and agents) with access to digital channels.

The following table describes the contents of the **Groups** menu:

Field Name	Description
Group name	Name of the group
Department	An alias to map the group to the physical org hierarchy.
No. of teams	Number of teams within the group.
No. of group admins	Number of group admins within the group.
Action	Edit or delete a group. Not applicable to Contact Center Enterprise.

### Note

You can't edit a group name.

### 1.1.1.1.1 Teams

The Teams menu represents a group of people working in a particular function in a specific group (site), for example, Sales or Complaints. Although the CCE manages teams, it doesn't sync them. By default, the Admin Console has one team within the Default group called Default. All users with access to digital channels are mapped to the Default team.

Column Name	Description
Team logo	Displays the default logo.
Team name	Displays the name of the team that is set to Default.
Channels	Set to SMS, Email, Livechat, Facebook Messenger, Apple Messages for Business (AMB) and WhatsApp.
No. of managers	Displays the number of administrators that manage this team.

Column Name	Description
No. of agents	Displays the number of users that are part of the team.
Others	Displays the number of users belonging to other roles, such as Analyst, which don't apply to Contact Center Enterprise (CCE) today.

When you click the team name link, you can view the following tabs:

- Users
- Events and Rules

## Users

The Users table displays a read-only view of the users mapped to the Default team.

Column Name	Description
Name	Name of the user (<First Name> <Last Name>) as configured on CCE.
Login ID	User's Login ID - Set to Cisco IDP User ID for administrators and the Login ID as configured on IDP for users.  <b>Note</b> This does not affect how users log in to Contact Center Enterprise (CCE).
Email	Email ID of the user as configured on IDP.
Role	Role of the user that can be Client Admin or Agent.
Status	Status of the user on the Agent Desktop, such as Active or Inactive.
Date	Date when the user was last updated.
Time	Time when the user was last updated.

## Events and Rules

Events and rules allow you to post conversational data to trigger workflows or any HTTP APIs on external systems. Events allow your users to trigger workflows on demand during an active conversation. The system triggers the rules on the back of various conversational lifecycle events.

### Add a New Event

#### Procedure

##### Step 1

Navigate to **Admin Console > Groups > Events and Rules**.

## Step 2

Click **Add New Event** on the top-right corner of the screen.

The Configure Events page appears.

## Step 3

Enter the **Name** of the event.

## Step 4

Enter the URL in the given field. The system calls this URL when the event is triggered.

## Step 5

Choose one of the following methods:

- Get
- Put
- Post
- Patch
- Delete

## Step 6

Set the type of response format in the **Expected Response Format** field to JSON.

## Step 7

Check the **Wait for Response** check box, which disables retriggering the same event until a response is received from the target system.

## Step 8

Check the Display Response on the chat console check box to enable the user to see the target system response in the chat console.

## Step 9

You can choose to pass the payload using either **Key Value Pair** or **Custom Payload**.

If you choose the **Key Value Pair** radio button, the key value pair settings appear on the screen.

Check the **Form Encode Request Body** check box to pass form encoded parameters in the request body.

Otherwise, you can configure the parameters and pass them in the API requests.

To add parameters, follow these steps:

- a. Click **Add Param**.

The **Add Parameter** pop-up window appears.

- b. Choose **Header/Query Param/Request Body** from the **Pass Through** drop-down list.

- c. Enter the **Parameter Name**.
- d. Check the **Mandatory Parameter** check box if the system must use this parameter when triggering an event.
- e. Choose the **Value** from the drop-down list.
- f. When you choose the **Custom Param** as the value from the list, choose one of these radio buttons:
  - o **Allow agent to enter value manually**: This option allows the user to enter the values manually before calling an external URL to post the data.
  - o **Allow agent to choose from a set of predefined values**: This option allows the user to choose preconfigured values before calling an external URL to post the data. When you choose this radio button, a text box appears on the screen. Enter the predefined values in the text box.
- g. Click the respective radio button and click **Add** to save the parameters.
- h. Use the **Edit** and **Delete** icons, respectively, to edit and delete the parameters.

## Add a New Rule

### Procedure

#### Step 1

Navigate to **Admin Console > Groups > Events and Rules**.

#### Step 2

Click **Add New Rule** on the top-right corner of the screen.

The **Configure Rule** page appears.

#### Step 3

Enter the **Rule Name**.

#### Step 4

Choose the condition from the **Fire When** drop-down list. The rules trigger automatically based on a certain preconfigured condition. The list includes the following conditions that are allowed in a Rule:

- **Message arrives**: This event is triggered whenever the user receives an incoming message.
- **Inbound message contains**: This event is triggered when an incoming message contains a keyword that was configured while creating an Inbound message contains rule. On the selection of this event, a text box is displayed. Enter the word (max 30 characters) in the text field.
- **Outbound message contains**: This event is triggered when an outgoing message sent by the user contains a keyword that was configured while creating an Outbound message contains rule. On the selection of this event, a text box is displayed. Enter the word (max 30 characters) in the text field.

- **Chat is closed:** This event is triggered when a conversation is closed using the REST APIs (Async REST API v1). The Chat is closed event is applicable when the event is fired By API option. The other options, Manually and By System (automatically), do not apply to CCE.
- **Chat created:** This event is triggered when a conversation is created. The Chat created event is applicable when the event is fired By API option. The other options, Manually and By System (automatically), do not apply to CCE.
- **Chat reopened:** This event is triggered when a conversation is reopened. The Chat reopened event is applicable when the event is fired By API option. The other options, Manually and By System (automatically), do not apply to CCE.
- **Message sent:** This event is triggered whenever the user sends an outgoing message to the customer.
- **Chat assigned:** This event is triggered when a conversation is assigned to the user. The Chat assigned event is applicable when the event is fired By API option. The other options, Manually and By System (automatically), do not apply to CCE.

**Note:**

Today, we support only conversation lifecycle events mentioned in **Step 4** on the Webex Engage application. Although users view agent lifecycle system events on Webex Engage's UI, they do not apply to CCE tenants.

**Step 5**

Choose one of the following methods:

- Get
- Put
- Post
- Patch
- Delete

**Step 6**

Enter the URL to make a request to in the given field when the event is triggered.

**Step 7**

Choose the type of response format in the Expected Response Format field as JSON.

You can choose to pass the payload using either Key Value Pair or Custom Payload.

If you select the Key Value Pair radio button, the key value pair settings appear on the screen.

## Step 8

Check the **Form Encode Request Body** check box to pass the form encoded parameters in the request body. Otherwise, you can configure the parameters and pass them in the API requests.

## Step 9

To add parameters, follow these steps:

- a. Click **Add Param**.  
The **Add Parameter** pop-up window appears.
- b. Choose **Header/Query Param/Request Body** from the **Pass Through** drop-down list.
- c. Enter the **Parameter Name**.
- d. Choose the **Value** from the drop-down list.
- e. Click **Add**.

## Step 10

Choose the **Custom Payload** radio button to pass the payload in JSON format.

The parameters should prefix with @@ and close in curly {} braces in the data field.

## Step 11

Click **Save Rule** to save the configured rule.

## Step 12

You can configure Rules through JavaScript code. To do this, turn on the **On/Off JavaScript Rule** toggle on the top-right corner of the **Configure Rule** page.

## Step 13

Click **Save Rule**.

## Edit Events and Rules

### Procedure

#### Step 1

Navigate to **Client Admin Console > Groups > Events and Rules**.

#### Step 2

Click the **Edit** icon in the Actions column of an Event or Rule.

The **Configure Event or Configure Rule** page appears.

#### Step 3

Make the required changes.

#### Step 4

Click **Save Event/Save Rule**.

## Delete Events and Rules

### Procedure

#### Step 1

Navigate to **Admin Console > Groups>Events and Rules**.

#### Step 2

Click the **Delete** icon in the Actions column of an Event or Rule.

A confirmation message appears on the screen.

#### Step 3

Click **OK** to delete the chosen Event or Rule.

## 2.1.3. Settings

Use **Settings** to manage tenant-wide configurations for the digital channel stream. You can configure the following parameters:

Field Name	Description
Enable attachments on Customer Care console	Use this toggle to enable or disable attachments on the Agent Desktop. Further, you can configure the allowable number of attachments, attachment sizes, and file formats.
Enable chat history in agent replies	Turn on the <b>Enable chat history in agent replies on email channel</b> toggle to allow users to send conversation history in their replies.
Account Dormancy	Users are marked as <b>Dormant</b> if they don't attend any digital channel contacts for consecutive 30 days.

## 2.1.4. Users

The Users section displays a read-only view of users that are mapped to a premium user license.

### Note

The synced list of users doesn't include the current logged in user or administrator.

### 2.1.4.1. Search Users

The users can search and quickly view the required results with the help of predefined filters like filter

by **Role type** (administrative/customer care) or **Status** (active/inactive) available on the Live agent's screen. After applying the required filters and clicking the **Search** button, the relevant results will display on the screen. Additionally, users can also directly enter a search criterion in the text field available below these filters to view the required results.

## 2.1.5. Assets

### 2.1.5.1. Channel Assets

Channel assets are business entry points for your customers to reach out to the business contact center. Channel assets registered with Contact Center Enterprise from the Webex Connect application appear here.

If you do not see your assets, such as SMS number, WhatsApp number, Facebook Messenger page name, Livechat App, Apple Messages for Business (AMB), or Business Email Account, in the Assets page, check the registration status of the asset on the Webex Connect application and ensure that it states **Registered** on <timestamp>.

#### Note

Don't edit any asset details directly on the **Channel Assets** page except the Livechat widget configuration. When you click the **Channel Assets** icon on the left menu, you see a list of current channel assets registered with Contact Center Enterprise (CCE). Each tab displays the channel and contains the channel assets.

Column	Description
Channel	Channel Icon that the asset belongs to
Asset Details	Business address of the asset, such as SMS number, WhatsApp number, Facebook Messenger page link, Livechat App ID, Apple Messages for Business ID, and Business Email ID
Asset Name	Name of the asset as configured on the Webex Connect application
ID	Internal ID generated for the asset by Webex Engage
Added on	Timestamp when the asset was registered with Contact Center Enterprise
Priority	Default priority that applies to the channel asset (currently not applicable to Contact Center Enterprise)

Column	Description
Action	Edit channel assets. Applicable only to the Livechat channel.

### 2.1.5.2. Livechat asset

The Livechat channel enables businesses to engage and support their website visitors and customers.

Customers can initiate a conversation with the contact center using the Livechat widget.

After creating a Livechat asset on Webex Connect application, you must follow the below steps to create a Livechat widget:

### 2.1.5.3. Configure Livechat Widget

#### Before you begin

The Livechat channel assets must be created in the Webex Connect application.

#### Procedure

##### Step 1

Navigate to **Admin Console > Assets > Channel Assets**.

##### Step 2

Click the **Livechat** tab.

##### Step 3

Click the **Edit** icon in the **Action** column of a Livechat asset.

##### Step 5

Configure the **General Settings** tab:

- a. Choose **Default Team** from the **Default** team drop-down list.
- b. Ensure the **Show chat conversation history to the end user on re-login** toggle is disabled.  
This toggle controls to show or hide conversation history to customers on revisiting the website.
- c. Turn on or off the **Allow customer to request for chat transcript from Livechat widget** toggle to enable or disable customers to request a conversation transcript from the Livechat widget.
  - You can configure the **agent name** or **generic alias** in the chat transcript as the agent identifier to protect the agents' privacy.
- d. Turn on the **Clear threads at end user's widget** toggle to clear conversations when the customer clicks on the **End chat**, navigates to a different browser, or closes the browser. Please note clearing threads on the widget does NOT close the conversations on the server end.
- e. Enable the **Notification sounds** toggle to play a chime sound when the end user receives a new

message.

- f. Enable the **Suppress Working Hours and Agent Present Checks** toggle to make the Livechat widget available 24X7 regardless of the team is out of scheduled working hours or no users are available.

**Note:**

The working hours and user presence states aren't synced between the Webex Engage and CCE today. So, we recommend keeping the **Suppress Working Hours and Agent Presence Checks** toggle **ON** permanently to allow Livechat customers to message in.

- g. Click **Save Changes**.

## Step 6

Configure the **Websites** tab:

- a. Click **Add Website**.  
The **Website Settings** page appears.
- b. In the **General** tab, configure the following fields.

Field Name	Description
Chat Widget Language	Choose a language from the <b>Chat Widget Language</b> drop-down list. The default language is English. All announcements, action button text, error notifications, and conversation transcripts display in the configured language on the widget.
Display Name	Enter the name that appears on the header of the widget.
Byline Text	Enter the support text that appears below the header.
Button Text	Enter the widget button text.
Greeting Message	Enter the personalized greeting message that customers will view on the end customer widget. The maximum character limit for this field is 500.
PCI Compliance Banner Message	Enter the message that a customer views when the message is not PCI-compliant.
Domain	Enter the domain name or subdomain name on which the widget must appear.
Set Wait Time	set an approximate wait time that customers see when they reach out on the widget. Turn on the <b>Display Approximate Wait Time</b> toggle and click one of the following

Field Name	Description
	radio buttons: Typically replies in a few minutes. Typically replies in a few hours. Typically replies in a day.

- c. In the **Set Chat Announcement** section, turn on the **Allow logging of chat announcement** toggle to configure personalized announcements on the widget.

You can choose to personalize or add more context to the announcement by using  $\$(agent)$  and  $\$(team)$  as variables in the text field. This announcement appears when a user sends the first outgoing message from the chat console. This field accepts all Unicode characters. The maximum character limit for the announcement field is 100 characters.

- d. In the **Email Transcript** section, enter the following details.

Field Name	Description
Subject	You can configure the Livechat transcript subject using $\$(transdate)$ and $\$(brandname)$ parameters. The subject will render in the configured language mentioned in the Subject field under the Email Transcript section. The maximum character limit for this field is 100.
Footer	You can configure the footer in the language you wish to render in the Email Transcript by entering the required footer text in the Footer field under the Email Transcript. The maximum character limit for this field is 1000 characters.

- e. Click **Save Changes**.

This activates the **Appearance** and **Widget Visibility** tabs.

- f. In the **Appearance** tab, configure the following fields.

Field Name	Description
Widget Color	Enter the <b>Color Code</b> for the widget. You can choose a color or provide a hex code.
Widget Button Type	Choose a conversation widget button design that appears on your website.

Field Name	Description
Logo	Upload a graphic file with your logo.
Message Composer	<p>configure the following settings on the Livechat message composer:</p> <p><b>Show composer when quick replies are sent:</b> You can turn on this toggle to allow users to compose new message in the composer if the suggested quick replies don't match the customer's intent. This setting is not currently applicable to Contact Center Enterprise.</p> <p><b>Show composer when carousels are sent:</b> You can turn on this toggle to allow users to compose new message in the composer when a carousel is sent. This setting is not currently applicable to Contact Center Enterprise.</p> <p><b>Allow Emojis:</b> You can turn on this toggle to allow customers to use emojis during the conversations on the widget. A default emoji list is provided on the widget. The customers can use any of the emojis available in the default list to communicate with the users.</p> <p><b>Allow Attachments:</b> You can turn on this toggle to allow customers to send attachments during the conversations on the widget.</p> <p><b>Note</b></p> <p>If you choose the <b>PCI compliance</b> option to drop attachments, the system overrides the Allow Attachments configuration.</p>

- g. Click **Save Changes**.
- h. In the **Widget Visibility** tab, define the visibility of the widget on the website.
  - Click the **Show without any restrictions** radio button to show the widget all the time, regardless of any restrictions set for the widget visibility. The setting is currently not applicable to Contact Center Enterprise.
  - Click the **Show with an OOO Banner** radio button to show the widget with an out of office (OOO) banner message. You can configure the OOO message in the message composer text box. The maximum length of a banner is 75 characters. Banners don't accept < and > parameters. The setting is currently not applicable to Contact Center Enterprise.
  - Click the **Hide completely** radio button to hide the widget completely. The setting is currently not applicable to Contact Center Enterprise.
  - Turn on the **Website Force Turn Off** toggle to force turn off the Livechat widget.
- i. Click **Save Changes**.

When you save this change, the existing customers can continue conversation. If the customer exits the conversation and clicks the list of threads, or tries to view or refresh the web page, the system hides the widget.

Any action on the **Force Turn Off** toggle is displayed to the customer without refreshing the browser.

Any changes that you make in the widget settings reflect only after the customers refresh the web page.

- j. In the **Banned Customers** tab, you can ban customers from reaching out to users on the Livechat widget. You can configure their IP addresses in the banned customer's list.

To add banned customer IP Addresses:

- a. Click **Add IP** on the banned customer's screen.
- b. Enter **IP Start Range**, **IP End Range**, and **Reason for banning a customer** in the respective text boxes.
- c. Click **Submit**.

A success message appears on the screen, and the system lists the IP details on the banned customer's screen.

- k. To edit a banned customer IP address:
  - a. Click the **Edit** icon in the **Actions** column of a specific customer.
  - b. Edit the required fields.
  - c. Click **Save Changes**.

To delete a banned customer IP address, click the **Delete** icon in the **Actions** column of a specific customer.

- l. Configure the **Installation** tab:

#### **LiveChat cookies consent**

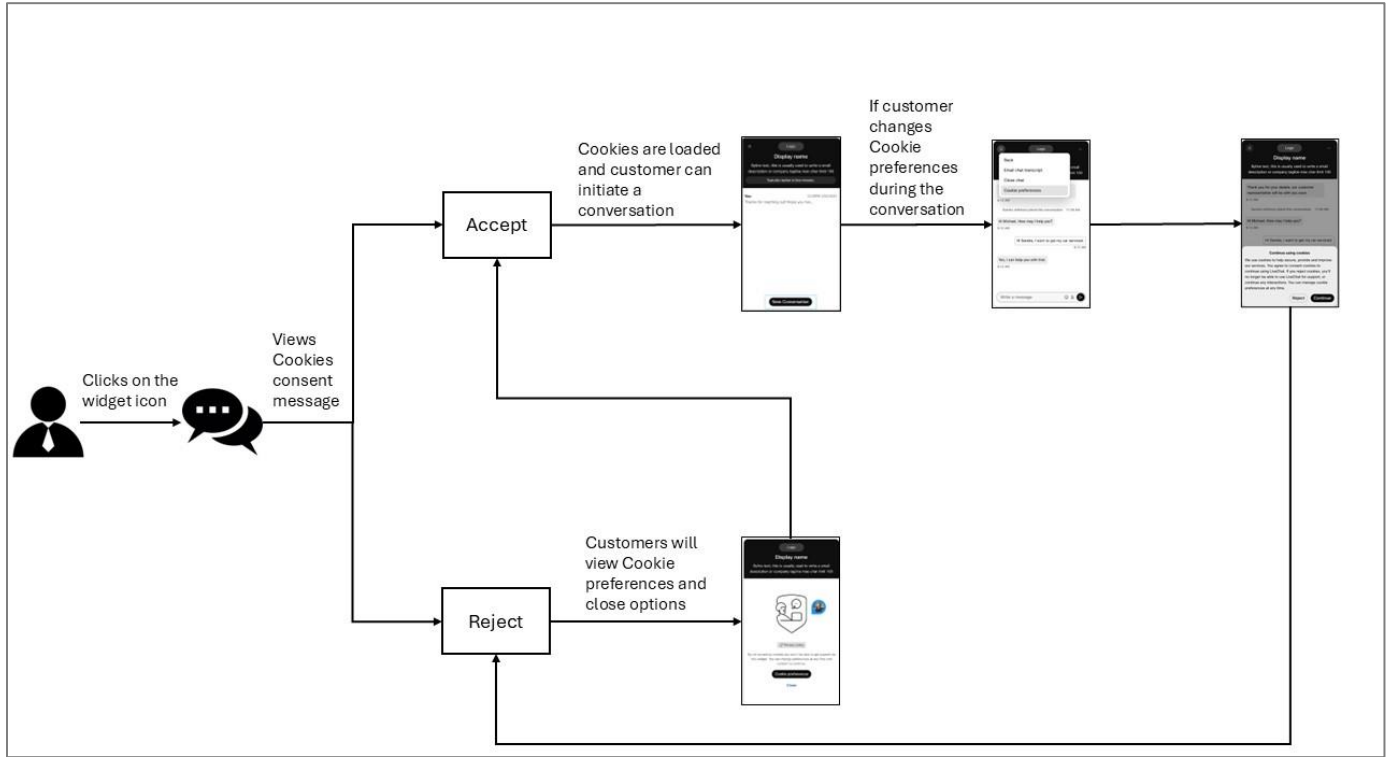
- a) Turn on the **Take consent from the customer** toggle to take manual consent from customers on Livechat widget.
- b) Click **Copy** to copy the widget script.
- c) Paste the script above the `</body>` tag in the HTML DOM. Note:

**Note:** We strongly advise against modifying the installation script of our Livechat widget within the client's code except for the Consent message and button labels. It is essential to embed the script exactly as provided, placing it beneath the body tag to ensure optimal functionality and to avoid

potential conflicts with the parent site.

### Customer experience on the Livechat widget

If Take consent from the customer setting is enabled for an asset, the customers will navigate through the following journey:



**Note:** End customers will see a weak network connection banner on the Livechat widget when the connection drops.

## 2.1.6. Templates

You can preset responses that users can use when they respond to customer queries. You can set up the responses in Templates, and group them in a Template Group to organize the content and make the templates easier to find.

### 2.1.6.1. Add a Template Group

#### Procedure

##### Step 1

Navigate to **Admin Console > Assets > Templates**.

##### Step 2

Click the + icon beside the **Template Groups** table header.

##### Step 3

In the **Group Name** field, enter the template group name. You can enter a maximum of 35 characters.

##### Step 4

Click **Add**.

### 2.1.6.2. Delete a Template Group

#### Step 1

Navigate to **Admin Console > Assets > Templates**.

#### Step 2

Click the delete icon beside the template group name.

#### Step 3

Click **OK** to delete the template group and all the templates stored in the group.

### 2.1.6.3. Upload Templates

Use the Upload Templates feature to perform bulk upload of templates. Bulk upload reduces the time taken to create templates.

#### Procedure

##### Step 1

Navigate to **Admin Console > Assets > Templates**.

##### Step 2

Select a template group from the **Template Group** list.

### Step 3

Click **Upload Template**.

### Step 4

Click the **Download sample file here** link to download the sample .csv file.

### Step 5

Rename the sample file with a unique name.

### Step 6

Open the sample file and enter the following details in the corresponding cells:

#### Note

All fields in the sample file are mandatory.

Don't edit or change the column header names. Ensure the team names are comma-separated in the TeamNames column.

- **Channel:** Enter the name of the channel, such as All, SMS, Email, AMB or Livechat.
- **TemplateGroup:** Enter the name of the template group.
- **TemplateName:** Enter the name of the template.
- **Text:** Compose the template text as per the configured character limit for each channel template.

Template Type	Maximum number of characters
All	320
SMS	320
Livechat	1000
Facebook Messenger	2000
WhatsApp	4096
AMB	10000
Email	No limit

#### Note

- The file size must not exceed 5 MB, with a maximum number of 1000 templates per sheet.
- The **Text** column supports all Unicode characters.
- Use the Pipe symbol (|) as a delimiter to enter multiline text in the **Text** column.
- In the upload templates file, even if a single record ends with a delimiter (|), all the records in that

file must end with the same delimiter.

- **Locked:** Enter **Yes** to lock the template or **No** to keep it unlocked.
- **TeamNames:** Enter the team names as comma-separated values. More than one team name means the templates are shared across the configured teams.

### Step 7

Delete the help notes in the .csv file before you upload it.

### Step 8

Save the file.

### Step 9

Click **Upload File**. Upload the file only in .csv format.

### Step 10

Click **Track Upload Status** to view the status of the files that you uploaded.

- a. In the **Show Activity Between** field, choose a date range and click **Apply**.
- b. Click **Search** to view all the files you uploaded during the chosen period.
- c. Optionally, enter a filename in the **Search** field to filter the table results.
- d. The **Status** column shows the status of the uploaded file as **Completed**, **Completed with errors**, or **Failed**.

### Step 11

If the status is **Completed with errors** or **Failed**:

- a. Click **Download Report** in the **Action** column.
- b. Fix the errors in the file based on the report's findings.
- c. Return to Step 9 to upload the file again.

#### 2.1.6.4. Add a Template

You can choose to create a common template for all channels or create channel-specific templates. You can create templates for the following channels:

- SMS
- Email
- Facebook Messenger
- WhatsApp
- Livechat

- Apple Messages for Business (AMB)

#### 1.1.1.1.2 Create a Common Template

You can create a common template for all channels.

#### Procedure

##### Step 1

Navigate to **Admin Console > Assets > Templates**.

##### Step 2

Select a template group from the **Template Group** list.

##### Step 3

Click **Add Template**.

##### Step 4

Click the **All** tab.

##### Step 5

Enter the template name in the **Template ID** field.

#### Note

The default **Sender ID** (a short code assigned to the team if SMS is enabled as a Channel) loads automatically when you create a template. This feature allows you to create and track the templates.

##### Step 6

Check the **Is End template** check box to set the template as a closing message of the conversation.

For example: Thank you for your time.

The users will not expect any response to this message from the customer.

##### Step 7

Check the **Is Start template** check box to set the template as an opening message to initiate a conversation.

For example: Hello <Customer>, how can I help you today?

##### Step 8

Check the **Is Follow-up template** check box to set the template as a follow-up message of the previous conversation.

For example: In line with our earlier conversation.

- **Custom Fields:** Enter custom fields in the template body using chevron brackets. For example: <customer name>. Custom fields are editable even in locked templates.

- **System Parameters:** Click the @@ icon or type @@ in the **Template Text** field to view the list of system parameters. You can choose any of these parameters and compose the template text. When you use these parameters in the template text, the corresponding values are dynamically substituted when a user selects these templates in a conversation.

#### Note

When the relevant values are not available for the configured parameters in the template body, these parameters are rendered in chevron braces and highlighted in yellow in the chat console.

#### Step 9

(Optional) Enter a customized message in the **Template Text** field. You can add emojis to the customized text. You can enter a maximum of 320 characters in the text box.

#### Step 10

Check the **Lock Template** check box to lock templates. When locked, users can edit only the custom or dynamic fields. A locked template displays the lock icon beside the template name.

#### Step 11

To share the template with other teams, choose the team from the **Shared Across** field.

#### Step 12

Click **Save Changes**.

The new template is displayed under the selected template group.

### 1.1.1.1.3 Create an SMS Template

#### Procedure

##### Step 1

Navigate to **Admin Console > Assets > Templates**.

##### Step 2

Select a template group from the **Template Group** list.

##### Step 3

Click **Add Template**.

##### Step 4

Click the **SMS** tab.

##### Step 5

Enter the template name in the **Template ID** field.

## Note

The default **Sender ID** (a short code assigned to the team if SMS is enabled as a Channel) loads automatically when you create a template. This feature allows you to create and track the templates.

## Step 6

Check the **Is End template** check box to set the template as a closing message of the conversation.

For example: Thank you for your time.

The users will not expect any response to this message from the customer.

## Step 7

Check the **Is Start template** check box to set the template as an opening message to initiate a conversation.

For example: Hello <Customer>, how can I help you today?

## Step 8

Check the **Is Follow-up template** check box to set the template as a follow-up message of the previous conversation.

For example: In line with our earlier conversation.

- **Custom Fields:** Enter custom fields in the template body using chevron brackets. For example: <customer name>. Custom fields are editable even in locked templates.
- **System Parameters:** Click the @@ icon or type @@ in the **Template Text** field to view the list of system parameters. You can choose any of these parameters and compose the template text. When you use these parameters in the template text, the corresponding values are dynamically substituted when a user selects these templates in a conversation.

## Note

When the relevant values are not available for the configured parameters in the template body, these parameters are rendered in chevron braces and highlighted in yellow in the chat console.

## Step 9

(Optional) Enter a customized message in the **Template Text** field. You can add emojis to the customized text. You can enter a maximum of 800 characters in the text box.

## Step 10

Check the **Lock Template** check box to lock templates. When locked, users can edit only the custom or dynamic fields. A locked template displays the lock icon beside the template name.

## Step 11

To share the template with other teams, choose the team from the **Shared Across** field.

## Step 12

Click **Save Changes**.

The new template is displayed under the selected template group.

### 1.1.1.1.4 [Create an Email Template](#)

## Procedure

### Step 1

Navigate to **Admin Console > Assets > Templates**.

### Step 2

Select a template group from the **Template Group** list.

### Step 3

Click **Add Template**.

### Step 4

Click the **Email** tab.

### Step 5

Enter the template name in the **Template ID** field.

### Step 6

Check the **Is End template** check box to set the template as a closing message of the conversation.

For example: Thank you for your time.

The users will not expect any response to this message from the customer.

### Step 7

Check the **Is Start template** check box to set the template as an opening message to initiate a conversation.

For example: Hello <Customer>, how can I help you today?

### Step 8

Check the **Is Follow-up template** check box to set the template as a follow-up message of the previous conversation.

For example: In line with our earlier conversation.

- **Custom Fields:** Enter custom fields in the template body using chevron brackets. For example: <customer name>. Custom fields are editable even in locked templates.
- **System Parameters:** Click the @@ icon or type @@ in the **Template Text** field to view the list of

system parameters. You can choose any of these parameters and compose the template text. When you use these parameters in the template text, the corresponding values are dynamically substituted when a user selects these templates in a conversation.

### Note

When the relevant values are not available for the configured parameters in the template body, these parameters are rendered in chevron braces and highlighted in yellow in the chat console.

### Step 9

(Optional) Enter a customized message in the **Template Text** field. You can add emojis to the customized text. You can apply the rich formatting styles to the text as described in the table.

Icon	Description
Bold	Bolds the text.
Italics	Italicizes the text.
Underline	Underlines the text.
Strikethrough	Strikes the text.
Font color	Changes the font color.
Ordered list	Creates an ordered list.
Unordered list	Creates an unordered list.
Link	Inserts a hyperlink on the text selected.
Paragraph (Headings)	Applies preset heading or paragraph styles to the text.
Table	Inserts a table.

### Step 10

Check the **Lock Template** check box to lock templates. When locked, users can edit only the custom or dynamic fields. A locked template displays the lock icon beside the template name.

### Step 11

To share the template with other teams, choose the team from the **Shared Across** field.

### Step 12

Click **Save Changes**.

The new template is displayed under the selected template group.

### 1.1.1.1.5 Create a Facebook Messenger Template

#### Procedure

##### Step 1

In the Management Portal navigation bar, choose **New Digital Channels** to launch the default console.

##### Step 2

Choose **Assets>Templates**.

##### Step 3

Click **Add Template**.

##### Step 4

Click **Facebook** to create a Facebook Messenger template.

##### Step 5

In the **Template Name** field, enter the name of the template.

**Step 6** Choose **Text** as a template type to configure a Text template.

#### Note

- The Template text field supports a maximum of 2000 characters.
- **Custom Fields:** Enter custom or editable fields in the template body using chevron(<>) brackets. Custom fields are editable fields even in locked templates.
- **System Parameters:** Click the @@ icon or type @@ in the **Template Text** field to view the list of system parameters. You can choose any of these parameters and compose the template text. When you use these parameters in the template text, the corresponding values are dynamically substituted when an agent selects these templates in a conversation.

#### Note

In the absence of relevant values for the configured parameters, the application renders the parameters in chevron braces and highlights them in yellow.

##### Step 7

Select the **Lock Template** checkbox to lock Text templates. Agents can edit only custom or dynamic fields when you lock a template.

##### Step 8

In the **Team excluded** field, select teams you don't want to share the template with.

##### Step 9

Click **Save Changes** to save the template.

### 1.1.1.1.6 Create a WhatsApp Template

#### Procedure

##### Step 1

In the Management Portal navigation bar, choose **New Digital Channels** to launch the default console.

##### Step 2

Choose **Assets>Templates**.

##### Step 3

Click **Add Template**.

##### Step 4

Click **WhatsApp** to create a WhatsApp template.

**Step 5** In the **Template Name** field, enter the name of the template.

**Step 6** In the **Template text** field, enter the text.

#### Note

- The Template text field supports a maximum of 4096 characters.
- **Custom Fields:** Enter custom or editable fields in the template body using chevron(<>) brackets. Custom fields are editable fields even in locked templates.
- **System Parameters:** Click the @@ icon or type @@ in the **Template Text** field to view the list of system parameters. You can choose any of these parameters and compose the template text. When you use these parameters in the template text, the corresponding values are dynamically substituted when an agent selects these templates in a conversation.

#### Note

In the absence of relevant values for the configured parameters, the application renders the parameters in chevron braces and highlights them in yellow.

##### Step 7

Select the **Lock Template** checkbox to lock Text templates. Agents can edit only custom or dynamic fields when you lock a template.

##### Step 8

In the **Team excluded** field, select teams you don't want to share the template with.

##### Step 9

Click **Save Changes** to save the template.

### 1.1.1.1.7 Create a Livechat Template

#### Procedure

##### Step 1

Navigate to **Admin Console > Assets > Templates**.

##### Step 2

Select a template group from the **Template Group** list.

##### Step 3

Click **Add Template**.

##### Step 4

Click the **Livechat** tab.

##### Step 5

Enter the template name in the **Template ID** field.

##### Step 6

Check the **Is End template** check box to set the template as a closing message of the conversation.

For example: Thank you for your time.

The users will not expect any response to this message from the customer.

##### Step 7

Check the **Is Start template** check box to set the template as an opening message to initiate a conversation.

For example: Hello <Customer>, how can I help you today?

##### Step 8

Check the **Is Follow-up template** check box to set the template as a follow-up message of the previous conversation.

For example: In line with our earlier conversation.

- **Custom Fields:** Enter custom fields in the template body using chevron brackets. For example: <customer name>. Custom fields are editable even in locked templates.
- **System Parameters:** Click the @@ icon or type @@ in the **Template Text** field to view the list of system parameters. You can choose any of these parameters and compose the template text. When you use these parameters in the template text, the corresponding values are dynamically substituted when a user selects these templates in a conversation.

#### Note

When the relevant values are not available for the configured parameters in the template body, these parameters are rendered in chevron braces and highlighted in yellow in the chat console.

### Step 9

(Optional) Enter a customized message in the **Template Text** field. You can add emojis to the customized text. You can enter a maximum of 2000 characters in the text box.

### Step 10

Check the **Lock Template** check box to lock templates. When locked, users can edit only the custom or dynamic fields. A locked template displays the lock icon beside the template name.

### Step 11

To share the template with other teams, choose the team from the **Shared Across** field.

### Step 12

Click **Save Changes**.

The new template is displayed under the selected template group.

#### 1.1.1.1.8 Create an Apple Messages for Business(AMB) Template

##### Procedure

##### Step 1

Navigate to **Admin Console > Assets > Templates**.

##### Step 2

Select a template group from the **Template Group** list.

##### Step 3

Click **Add Template**.

##### Step 4

Click **Apple Message for Business** tab.

##### Step 5

Enter the template name in the **Template ID** field.

##### Step 6

Choose a template type from the Template type drop-down list.

##### Note

You can create **Text**, **Text with Attachment**, **Time Picker**, **List Picker**, **Rich Link**, **Quick Reply**, and **Form** template types for the AMB channel.

## Step 7

Choose **Text** as a template type to configure a Text template.

## Step 8

In the **Template text** field, enter the text.

### Note

The Template text field supports a maximum of 10000 characters.

**Custom Fields:** Enter custom or editable fields in the template body using chevron(<>) brackets. Custom fields are editable fields even in locked templates.

**System Parameters:** Click the @@ icon or type @@ in the **Template Text** field to view the list of system parameters. You can choose any of these parameters and compose the template text. When you use these parameters in the template text, the corresponding values are dynamically substituted when an agent selects these templates in a conversation.

### Note

In the absence of relevant values for the configured parameters, the application renders the parameters in chevron braces and highlights them in yellow.

## Step 9

Choose **Text with attachments** as a template type to configure and support text with attachment templates.

## Step 10

In the **Upload Attachment** section, click **Choose File** or **Drop Files Here** to upload an attachment.

### Note

The Upload Attachment field supports a maximum limit of ≤ 5 MB.

## Step 11

Select the **Lock Template** checkbox to lock Text and Text with attachment template types. Agents can edit only custom or dynamic fields when you lock a template.

## Step 12

Choose the **Time Picker** template type to configure time slots for the customers.

- Configure **Received Message preview**.
  - Choose a **Message preview** bubble size from the **Style** radio buttons.
  - In the **Title** field, enter the title.
  - (Optional) In the **Subtitle** field, enter the subtitle.
  - Click **Choose File** or **Drop Files Here** to upload an attachment.

- (Optional) Configure Event Details.
- Enable the **Pre-fill event details** toggle to prefill event details.
  - In the **Event title** field, enter the title.
  - (Optional) In the **Location** details field, enter the location information.
  - (Optional) In the **Show on map** fields, enter the coordinates.
  - In the **Time Slots** fields, select date, time, and duration from the respective fields.
  - Click the **Add** icon, to add time slots further.
- Configure **Reply Message preview**.
  - Choose a **Message preview** bubble size from the **Style** radio buttons.
  - In the **Title** field, enter the title.
  - (Optional) In the **Subtitle** field, enter the subtitle.
  - Click **Choose File** or **Drop Files Here** to upload an attachment.

### Step 13

Choose the **Time Picker** template type to configure a list of items and information regarding them.

- Configure **Received Message preview**.
  - Choose a **Message preview** bubble size from the **Style** radio buttons.
  - In the **Title** field, enter the title.
  - (Optional) In the **Subtitle** field, enter the subtitle.
  - Click **Choose File** or **Drop Files Here** to upload an attachment.
- Configure **List Details**.
  - In the **Section title** field, enter the title.
  - To configure multiple sections, select the **Allow multiple selections for section** checkbox.
  - Click **Drop files here to upload**, to upload image files.
  - In the **Item Title** field, enter the title.
  - (Optional) In the **Item Subtitle** field, enter the subtitle.
  - Click **the Add** icon adjacent to the Item name field to add multiple items.
  - Click **Add Section** to save the list.
- Configure **Reply Message preview**.
  - Choose a **Message preview** bubble size from the **Style** radio buttons.
  - In the **Title** field, enter the title.
  - (Optional) In the **Subtitle** field, enter the subtitle.

- Click **Choose File** or **Drop Files Here** to upload an attachment.

#### Step 14

Choose the **Rich Link** template type, to configure and send rich links to the consumer device.

- Configure **Received Message preview**.
  - In the **Title** field, enter the title.
  - In the **URL** field, enter the rich link URL.
  - Select a media type from the drop-down list.

##### Note

- The media field supports Image or Video files.
  - When you select the Video as media type, upload the thumbnail image for easier identification and visibility. The video file must be in MP4 format.
- Click **Choose File** or **Drop Files Here** to upload an attachment.

#### Step 15

Choose the **Quick Reply** template type to configure questions and options.

- In the **Title** field, enter the question.
- In the **Add options** field, enter the options.

##### Note

In the Add options field, you can configure a minimum two and a maximum of five options.

#### Step 16

Choose **Form** template type to configure rich, multi-page interactive flows for users on iOS and iPadOS devices using a single JSON payload.

- In the **Description** field, enter the form description to provide additional information to the agents using a form template.
- Click **Load sample in editor** to load a sample JSON and customize it, or you can enter a valid JSON.
- Click **Beautify** adjacent to the Load sample in editor to format and make the JSON readable.

#### Step 17

In the **Team excluded** field, select teams you don't want to share the template with.

#### Step 18

Click **Save changes** to save the template.

## 2.2. Customer Care Console

### 2.2.1. Dashboard

Use the dashboard to view the list of conversations awaiting a user's reply. The dashboard helps identify any waiting customers in the queue.

The dashboard contains the following tabs:

- Conversations
- Workforce

#### 2.2.1.1. Conversations

You can view the open conversations count under the **Conversations** tab. The open conversation count is the total count of conversations in the **Queue**, **Active**, and **On Hold** status of a particular team. You can view each status on its own card to see the specific conversation count for that status. You can click on each of these cards to view the details of the conversations under the selected status.

#### Note

The Contact Center Enterprise (CCE) doesn't support the On Hold status.

The Active status card groups conversations into those waiting for agent responses and those waiting for customer responses.

Based on the status card selection, you can view conversation details such as chat ID, customer ID, priority, agent ID, average response time, handle time, and last updated on.

### View Conversation Transcript

#### Procedure

	Command or Action	Purpose
<b>Step 1</b>	Click the Profile icon on the top-right corner of the dashboard and click <b>Switch to Customer Care</b> .	
<b>Step 2</b>	Click the <b>Chat Log</b> icon in the Action column of a conversation.	The conversation log dialog box appears on the screen.

## Search Conversations Based on Specific Filters

	Command or Action	Purpose
<b>Step 1</b>	Click the Profile icon on the top-right corner of the dashboard and click <b>Switch to Customer Care</b> .	
<b>Step 2</b>	Click the <b>Add Filter</b> on the dashboard screen.	
<b>Step 3</b>	Create conditions on the <b>Filter Chats</b> screen.	
<b>Step 4</b>	Click <b>View Results</b> to view conversations that satisfy the filter conditions.	The search results table displays all the results that match the filter conditions.

## Search and View Transcripts

### Procedure

#### Step 1

Click the Profile icon on the top-right corner of the dashboard and click **Switch to Customer Care**.

#### Step 2

You can search and view conversation transcripts in the Search page based on the following field values.

Field	Description
Name	Full name of the customer as received from the channel and configurations in the Create Conversation node in the flow. Applies to Livechat channel. For email: set to the primary customer's email address (from address) by default. For SMS: set to the customer's mobile number by default. <b>Note</b> Partial searches are not supported. Search is case insensitive.
Mobile Number	SMS mobile number of the customer. Useful to search for SMS conversations.
Email ID	Email ID of the customer. Useful to search for email conversations.
Chat ID (Conversation ID)	Unique identifier of a conversation.
Livechat ID	A unique UUID—set on the customer's browser by the Livechat widget.

Field	Description
Apple Messages for Business (AMB)	Number or Email ID associated with the Apple ID.
WhatsApp Mobile Number	Registered mobile number of the customer.
Tags	Not applicable to Contact Center Enterprise
Priority	Not applicable to Contact Center Enterprise
Agent ID	Agent ID is configured to CI User ID. Not for use currently.
Customer ID	Unique identifier of the customer as defined by the business. Not applicable to Contact Center Enterprise.

### 2.2.2. Blocklist Words

You can configure the blocked words that users should refrain from using in the conversations. If these words appear in the customer's message, they are replaced with an asterisk (\*) before they are sent to the users. This feature supports English and the full range of Unicode characters that covers most languages in the world.

You can perform the following actions on this screen:

- Configure the blocked words that must be filtered out of the messages, or search for preconfigured blocked words.
- Configure Email IDs of the recipients to whom a report is sent if blocked words are found in the outbound messages that the user tries to send to the customer.
- If the user types a message that contains any of the blocked words, the system displays a warning, and it doesn't send the message until that user removes that word.
- Manage the Blocklist

### Manage the Blocklist

#### Procedure

##### Step 1

Click the Profile icon on the top-right corner of the dashboard and click **Switch to Customer Care**.

##### Step 2

Navigate to **Settings > Manage > Blocklists**.

The **Default Blocklist** section displays the default blocked words. You cannot delete these words, but you can activate and deactivate them.

### Step 3

To deactivate a word:

- a. Choose the word from the Active list.  
Optionally, use the search field to filter the list.

#### Note

You can choose multiple blocked words using the SHIFT key and inactivate them at once.

- b. Click the **Right Arrow** icon to move the blocked word to the Inactive list.
- c. Click **OK** to move the word from the Inactive to the Active list.

### Step 4

To activate a word:

- a. Choose the word from the Inactive list.  
Optionally, use the search field to filter the list.
- b. Click the **Left Arrow** icon to move the blocked word to the Active list.
- c. Click **OK** to move the word from the Inactive to the Active list.

### Step 5

In the **Custom Blocklist** section, add your own list of words to the blocklist.

- a. Enter the blocked word in the **Enter word to blocklist** field beside the **Add Word**.
- b. Click **Add Word**.

The word is displayed in the text box. Similarly, you can configure any number of words.

### Step 6

In the **Escalations** section, you can enable escalations.

- a. Check the **Escalations** check box.
- b. Enter comma-separated Email IDs in the text box. All the configured Email IDs are notified if blocked words occur in outbound messages. Check the **Allow the agent to unmask blocked words that appear in inbound messages** check box to provide access permission to users to unmask blocked words in inbound messages.

## Step 7

Click **Save Changes**.

### Note

It is mandatory to click **Save Changes** at the bottom-right corner of the screen to apply any actions performed on the blocklists screen.



### For more information

Please visit [cisco.com/c/en/us/products/contact-center](https://cisco.com/c/en/us/products/contact-center)