Webex Engage Admin and Setup Guide

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Contents

1. About New Digital Channels

Webex Contact Center supports new digital channels—Facebook Messenger, Livechat, Email, SMS, 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 through any channels of their choice. Businesses must be available through all the popular channels of communication.

2. New Digital Channel Consoles

The new digital channel administration portal is split into the following areas:
- Admin console–Administrators can manage tenant-wide configurations for digital channel offerings such as policies and channel asset configurations. In the Management Portal navigation bar, click New Digital Channels to launch the default console.
- Customer Care console–Primarily used to access past conversation transcripts and agent monitoring capabilities.

2.1. Admin Console

The following table describes the Admin Console components.

Component	Description
Dashboard	Displays information on chats traffic and workforce-related metrics.
Groups	Allows you to configure entry points to a workflow that invokes on the back of conversation lifecycle events, or manually triggered 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 omnichannel access or licensed as a premium agent synced from Control Hub.
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.

2.1.1.1. Groups

The Groups menu represents geographical sites. Although you can manage the sites from Control Hub, you can't sync these sites in the Admin Console. By default, the Admin Console has one preconfigured group called Default. The Default group contains all agents with premium agent licenses.

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.

Note
You can't change 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 Webex Contact Center Management Portal manages teams, the Management Portal doesn't sync teams. By default, the Admin Console has one team within the Default group called Default. All premium agent-licensed agents 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, Facebook Messenger, Livechat, and Email, and WhatsApp
No. of managers	Displays the number of administrators that manage this team.
No. of agents	Displays the number of agents that are part of this team.
Others	Displays the number of users belong to other roles, such as Analyst, that aren't applicable to Webex Contact Center today.

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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 in Control Hub
Login ID	User's Login ID – Set to Cisco CI User ID. **Note** This has no bearing on the way users log in to Webex Contact Center.
Email	Email ID of the user as configured in Control Hub
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 active
Time	Time when the user was last active

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 agents 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

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

Step 2

Choose **Groups** > **Events and Rules**.

Step 3

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

The Configure Events page appears.

Step 4

Enter the **Name** of the event.

Step 5

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

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Step 6

Choose one of the following methods:

- Get

- Put

- Post

- Patch

- Delete

Step 7

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

Step 8

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

Step 9

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

Step 10

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 agent 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 agent to choose preconfigured values before calling an external URL to post the data. When you choose this radio button, a text box appears

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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

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

Step 2

Choose Groups > Events and Rules.

Step 3

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

The **Configure Rule** page appears.

Step 4

Enter the **Rule Name**.

Step 5

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**: Rule is triggered for an inbound message.
- **Inbound message contains:** Rule is triggered when an inbound message contains a configured word. On the selection of this condition, a text box is displayed. Enter the word (max 30 characters) in the given text field.
- **Outbound message contains:** Rule is triggered when an outbound message contains a configured word. On the selection of this condition, a text box is displayed. Enter the word (max 30 characters) in the given text field.
- **Chat is closed:** Rule is triggered when the chat is closed. Select an option, to trigger the rule Manually, By API, or By System. You'll need to choose By API for this rule to work on your tenant.
- **Chat created:** Rule triggers automatically when a chat is created. A post request can be made (third-party URL), whenever a chat is created. You need to choose By API for this rule to work on your tenant.
- **Chat reopened:** Rule triggers when a chat is reopened. Select an option, to trigger the rule Manually or By API or By System. You'll need to choose By API for this rule to work on your tenant.
- **Message sent:** Rule triggers when a message is sent.

Step 6

Choose one of the following methods:

- Get

- Put

- Post

- Patch

- Delete

Step 7

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

Step 8

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 9

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 10

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 11

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 12

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

Step 13

You can configure Rules through JavaScript code. To do this, turn on the **On/Off JavaScript Rule** toggle button on the

top-right corner of the **Configure Rule** page.

Step 14

Click **Save Rule**.

Edit Events and Rules

Procedure

Step 1

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

Step 2

Choose Client Admin Console > Groups > Events and Rules.

Step 3

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

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

Step 4

Make the required changes.

Step 5

Click **Save Event/Save Rule**.

Delete Events and Rules

Procedure

Step 1

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

Step 2

Choose **Client Admin Console** > **Groups**>**Events and Rules**.

Step 3

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

A confirmation message appears on the screen.

Step

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

2.1.2. Settings

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

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Field Name	Description
Enable attachments on Customer Care console	Use this toggle button 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 **Enable chat history in agent replies on email channel** toggle button to allow agents to send chat history in their replies.
Account Dormancy	Users are marked as **Dormant** if they don't attend any digital channel contacts for consecutive 30 days.

2.1.3. Users

The **Users** section displays a read-only view of users that are mapped to a premium agent license. If any users mapped to a premium agent license are not listed here, resynchronize users manually using Control Hub.

Note

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

2.1.4. Assets

This section covers the following:

- Channel Assets
- Configure Livechat widgets

2.1.4.1. Channel Assets

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

If you do not see your asset, such as SMS number, Facebook Messenger page, Livechat App, WhatsApp, 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 Webex Contact Center. Each tab displays the channel and contains the channel assets.

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Column	Description
Channel	Name of the user (<First Name> <Last Name>) as configured in Control Hub
Asset Details	Business address of the asset, such as SMS number, WhatsApp number or Facebook page link
Asset Name	Name of the asset as configured on the Webex Connect application
ID	Internal ID generated for the asset by Webex Contact Center
Added on	Timestamp when the asset was registered with Webex Contact Center
Priority	Default priority that applies to the channel asset (currently not applicable to Webex Contact Center)
Action	Edit

2.1.4.2. Configure Livechat Widgets

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.

Before you begin

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

Procedure

Step 1

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

Step 2

Choose Assets > Channel Assets.

Step 3

Click the Livechat tab.

Step 4

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 button is disabled.

   This toggle button controls to show or hide chat 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 button to enable or disable customers to request a chat transcript from the Livechat widget.

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d. Turn on the **Clear threads at end user's widget** toggle button to clear chats when customer clicks End chat, or navigates to a different website, or closes the browser.

e. You can configure either an agent name or generic alias in the chat transcript as the agent identifier to protect the privacy of agents.

f. Ensure that the **Close chats on the server upon chat abandonment** toggle button is disabled. This toggle button instructs the application to automatically close chats on the server when customers abandon the chats. This feature doesn't apply yet to Webex Contact Center tenants.

g. Enable the **Notification sounds** toggle button to play a chime sound when the end user receives a new message.

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

i. 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 **Chat Widget Language** drop-down list. The default language is English. All announcements, action button text, error notifications, and chat 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 call-to-action (CTA) button name. The maximum number of characters allowed in the button text field is 30.
First Message	Enter the message that a customer views on the widget.
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.

c. In the Set Wait Time section, set an approximate wait time that customers see when they reach out on the widget.

Turn on the Display Approximate Wait Time toggle button and click one of the following radio buttons:

- Typically replies in a few minutes.

- Typically replies in a few hours.

- Typically replies in a day.

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

Compose the announcement using $(agent) and $(team) as variables in the text field. This announcement appears when an agent sends the first outgoing message from the chat console. This field accepts all Unicode characters. The maximum character limit for the chat announcement field is 100 characters.

e. 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.

f. Click **Save Changes**.

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

g. In the **Appearance** tab, configure the following fields.

Field Name	Description
Widget Color	Enter the **Color Code** for the widget. You can choose a color or provide a hex code.
Widget Button Type	Choose a chat widget button design that appears on your website.
Logo	Upload a graphic file with your logo.
Message Composer	configure the following settings on the Livechat message composer: **Show composer when quick replies are sent**: You can turn on this toggle button to allow agents 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. **Allow Emojis**: You can turn on this toggle button 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

Field Name	Description
	of the emojis available in the default list to communicate with the agents.
	Allow Attachments: You can turn on this toggle button to allow customers to send attachments during the conversations on the widget.
	Note
	If you choose the **PCI compliance** option to drop attachments, the system overrides the **Allow Attachments** configuration.

h. Click **Save Changes**.

i. 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.

- 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.

- Click the **Hide completely** radio button to hide the widget completely.

- Turn on the **Website Force Turn Off** toggle button to force turn off the Livechat widget. Configure the following settings:

    o   In the **Unavailability Banner Message** text field, enter a message about the unavailability of the widget. The system displays this message to the customers who try to access the widget.

    o   Turn on the **Hide widget for new customers or when existing customers refresh the browser** toggle button to hide the widget for the new customers without displaying the banner message.

        Existing customers can view the banner message when they refresh their browser.

j. Click **Save Changes**.

When you save this change, the existing customers can continue chatting. 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 button 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.

k. In the **Banned Customers** tab, you can ban customers from reaching out to agents 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.

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       b.   Enter **IP Start Range**, **IP End Rage**, 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.

   l.   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.

   m. Configure the **Installation** tab:

       a.   Click **Copy** to copy the widget script.

       b.   Paste the script above the \</body> tag in the HTML DOM.

2.1.5. Templates

You can preset responses that agents 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.

2.1.5.1. Add a Template Group

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

Step 4

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

Step 5

Click **Add**.

2.1.5.2. Delete a Template Group

Step 1

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

Step 2

Choose **Assets**>**Templates**.

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Step 3

Click the delete icon beside the template group name.

Step 4

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

2.1.5.3. Upload Templates

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

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 **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, Facebook, SMS, Email, Livechat, or WhatsApp.

- **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

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Template Type	Maximum number of characters
Facebook Messenger	2000
Livechat	1000
Email	No limit
WhatsApp	4096

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.

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2.1.5.4. 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
- Facebook Messenger
- Email
- Livechat
- WhatsApp

1.1.1.1.2   Create a Common Template

You can create a common template for all channels.

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 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 chat conversation.

For example: Thank you for your time.

The agents 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 the chat 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 chat

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conversation.

For example: In line with our earlier chat.

- **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 an agent 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, agents 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

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 the **SMS** tab.

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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 chat conversation.

For example: Thank you for your time.

The agents 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 the chat 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 chat conversation.

For example: In line with our earlier chat.

- **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 an agent 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, agents 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

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 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 chat conversation.

For example: Thank you for your time.

The agents 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 the chat 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 chat

conversation.

For example: In line with our earlier chat.

- **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 an agent selects
  these templates in a conversation.

  Note

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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, agents 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 Livechat 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 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 chat conversation.

For example: Thank you for your time.

The agents 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 the chat 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 chat conversation.

For example: In line with our earlier chat.

- **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 an agent 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, agents 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.

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Step 12

Click **Save Changes**.

The new template is displayed under the selected template group.

1.1.1.1.6 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 the **Facebook** 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 chat conversation.

For example: Thank you for your time.

The agents 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 the chat 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 chat conversation.

For example: In line with our earlier chat.

- **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 an agent selects these templates in a conversation.

  Note

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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

Click the Text Template radio button to create a Text template. You can enter a maximum of 2000 characters in the text box. You can add emojis to the customized text.

Step 10

Click the **Action Template** radio button to create an Action template. Use this option when the customer expects a quick response. The system sends the message with images and buttons to enable the customer to respond with a click of a button.

- Click **Upload Image** to browse and choose the required image.
- Enter **Button Names** and choose **Button Type** from the drop-down list.
- If you choose the **Web URL** button type, enter the **Call URL**.
- Compose the **Template Text**.

Step 11

Click the **Multimedia Template** radio button to create a Multimedia template. The system supports the following multimedia types:

- Image
- Audio
- Video
- File

Step 12

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

Step 13

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

Step 14

Click **Save Changes**.

The new template is displayed under the selected template group.

1.1.1.1.7   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 the **WhatsApp** 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 chat conversation.

For example: Thank you for your time.

The agents 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 the chat 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 chat conversation.

For example: In line with our earlier chat.

- **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 an agent 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

Click the **Text** radio button to create a text template. You can enter a maximum of 4096 characters in the text box.

  Note

  Attachments and WAB Registered Message template types are not applicable for Webex Contact Center tenants.

Step 10

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Check the **Lock Template** check box to lock templates. When locked, agents 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.

2.2. Customer Care Console

2.2.1. Dashboard

Use the dashboard to view the list of chats awaiting an agent'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 chats 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 chat count for that status. You can click on each of these cards to view the details of the chats under the selected status.

Note

Webex Contact Center doesn't support the On Hold status.

The Active status card groups chats into those waiting for agent responses and those waiting for customer responses. Based on the status card selection, you can view chat details such as chat ID, customer ID, priority, agent ID, average response time, handle time, and last updated on.

View Conversation Transcript

By default, the digital channel users can view the latest six months live data on the UI and via API. If you want to view data beyond six months, contact the support team. The support team can provide up to 24 months of data offline.

Procedure

Step 1

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

Step 2

Click the **Switch to Customer Care** button at the top-right corner of the dashboard.

Step 3

Click the **Chat Log** icon in the Action column of a chat.

The chat log dialog box appears on the screen.

Search Chats Based on Specific Filters

Procedure

Step 1

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

Step 2

Click the **Switch to Customer Care** button at the top-right corner of the dashboard.

Step 3

Click the **Add Filter** button on the dashboard screen.

Step 4

Create conditions on the **Filter Chats** screen.

Step 5

Click **View Results** to view chats 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

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

Step 2

Click the **Switch to Customer Care** button at the top-right corner of the dashboard.

Step 3

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 Facebook Messenger and Livechat channel. For email: set to the primary customer's email address (from address) by default.

Field	Description
	For SMS: set to the customer's mobile number by default. **Note** 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.
WhatsApp Mobile Number	Registered mobile number of the customer.
Tags	Not applicable to Webex Contact Center
Priority	Not applicable to Webex Contact Center
Agent ID	Agent ID is configured to CI User ID as part of the initial phase and cannot be used in this phase.
Customer ID	Unique identifier of the customer as defined by the business. Not applicable to Webex Contact Center.

2.2.2. Blocklist Words

You can configure the blocked words that agents 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 agents. 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 agent tries to send to the customer.

- If the agent types a message that contains any of the blocked words, the system displays a warning, and it doesn't send the message until that agent removes that word.

Manage the Blocklist

Procedure

Step 1

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

Step 2

Switch to the **Customer Care Console**.

Step 3

Choose **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 4

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 5

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 6

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** button.

    b.   Click **Add Word**.

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

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Step 7

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.

    c.   Check the **Allow the agent to unmask blocked words that appear in inbound messages** check box to provide access permission to agents to unmask blocked words in inbound messages.

Step 8

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

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