

Anonymous Webchat with Link Customer Feature in Agent Console

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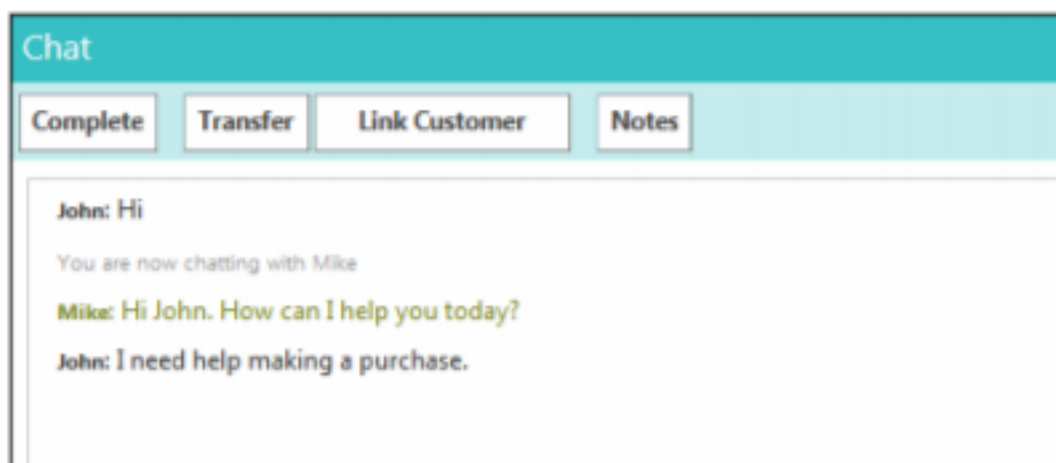
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Introduction

This document describes the instruction on how to display different options on link customer window when anonymous webchat is implemented. This document is a complementary to the Cisco Unified Web and E-Mail Interaction Manager Agent's Guide, release 11.0(2) Link Customers section.

Anonymous chats allow customers to chat with agents with no provision of any personal details e.g. name, email address, phone number. When the customer clicks the chat link or button, they are not displayed with the log in page.

Such visitors are created as anonymous customers in the system, and no customer record is created for the chat activity. If at a later point the visitor is identified as a customer, or you need to create a new customer record for the visitor, you can do so with **Link Customer** button available in the Chat pane.



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Prerequisites

Requirements

Cisco recommends that you have knowledge of these topics:

- Unified Contact Center Enterprise (UCCE)
- Cisco Unified Web and E-Mail Interaction Manager (WIM/EIM)

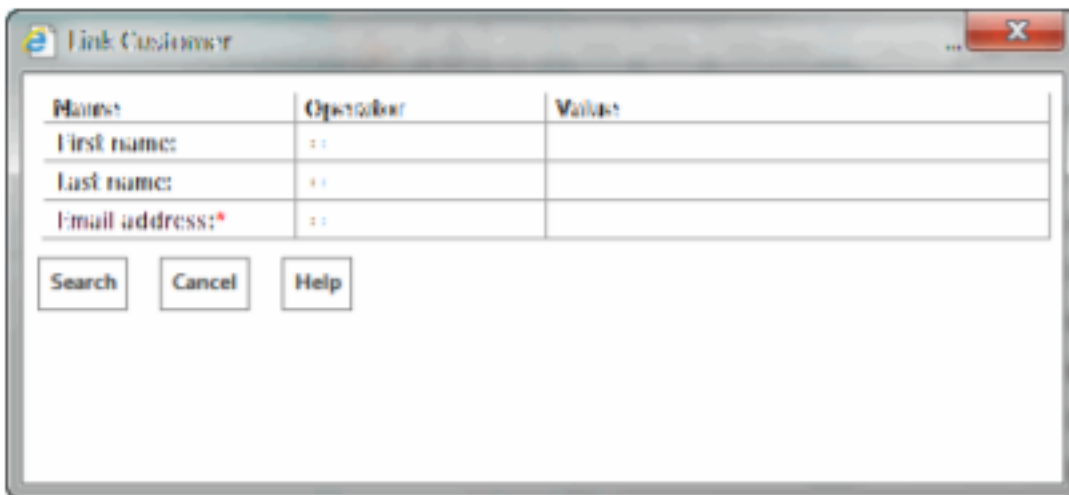
Components Used

The information in this document is based on these software and hardware versions:

- WIM/EIM 11.0(2)

Background Information

In the Link Customer window, use the available options to search for a customer. By default, the window asks for the first name, last name, and the email address, but it can display different options based on how your administrator has set up the window. If the search returns a matching result, the chat activity is associated with the customer. If the customer does not exist, a new customer record is created for the activity. In order to configure additional options to default options in Link customer window, there are steps must be taken to configure these additional options. This document provides steps on how to configure these additional options.



The screenshot shows a window titled "Link Customer" with a search form. The form has three columns: "Name", "Operator", and "Value". The "Name" column has three rows: "First name:", "Last name:", and "Email address:". The "Operator" column has three rows, each with a double asterisk "**". The "Value" column is empty. Below the form are three buttons: "Search", "Cancel", and "Help".

| Name | Operator | Value |
|----------------|----------|-------|
| First name: | ** | |
| Last name: | ** | |
| Email address* | ** | |

Search Cancel Help

Fill in customer details

Configuration Steps

Step 1. Log in as Partition Administration (Partition Id = 1).

<http://<ip of webserver>/system/web/view/platform/common/login/root.jsp?partitionId=1>

Step 2. Select **Tools console**.



Consoles

AUTHORING



Knowledge Base

MANAGEMENT



Administration



Reports



Supervision



Offers

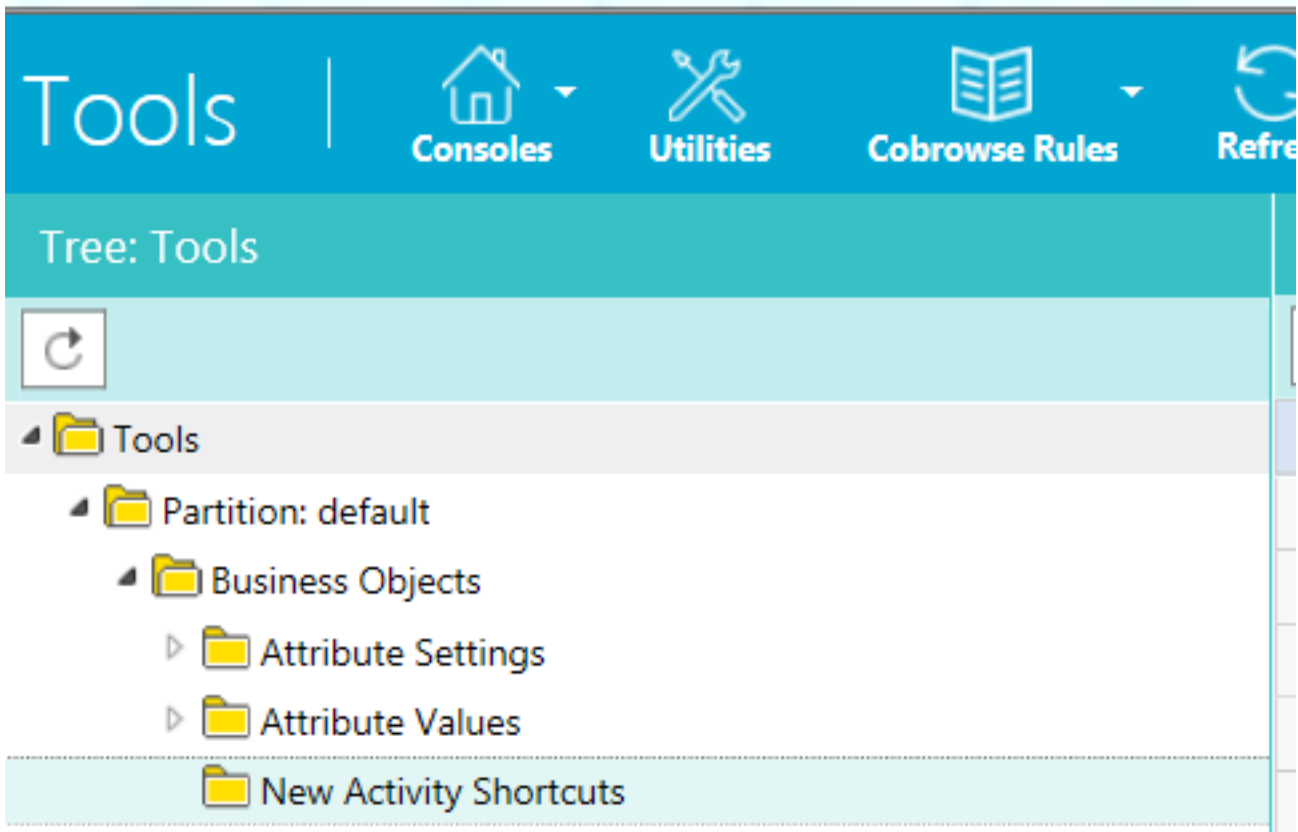


System

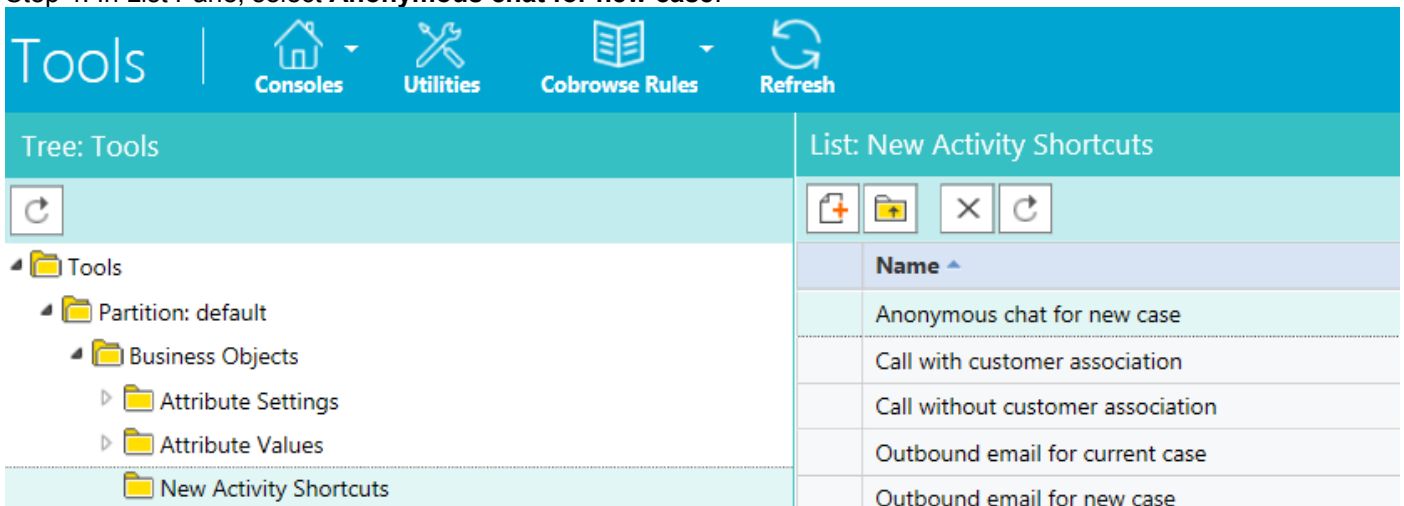


Tools

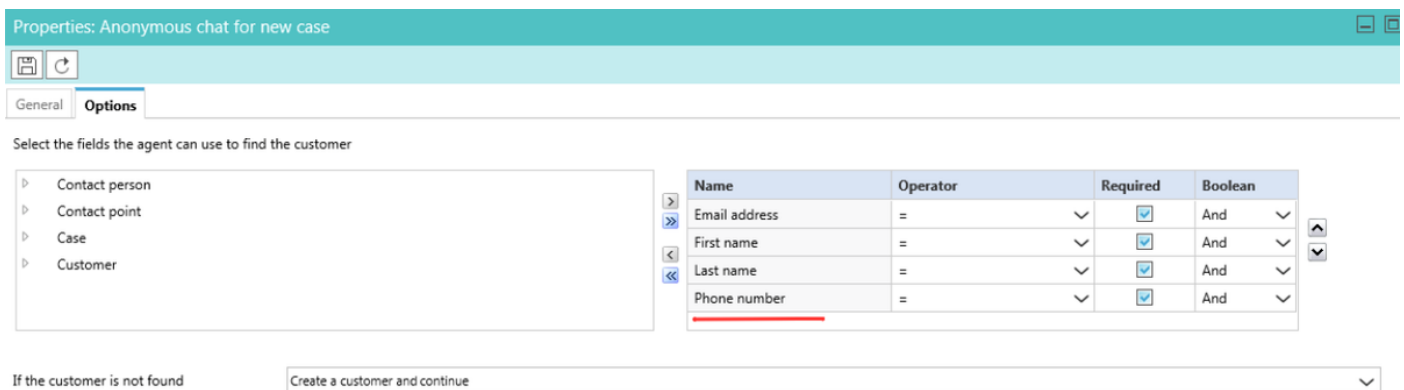
Step 3. In Tree pane select **Tools>Partition:default>Business Objects>New Activity Shortcuts**.



Step 4. In List Pane, select **Anonymous chat for new case**.



Step 5. In Properties pane, select **options**.



Step 6. Under options select necessary options that you want to be displayed when Link Customer button is clicked.

Step 7. Click **Save**.

Step 8. Select **Utilities** ☉ **Clear SCAP cache** ☉ click on **Run** button.

| Utility Name | Description | Action |
|-------------------|---|--------|
| Clear SCAP cache | Clear SCAP cache. | Run |
| Clear topic cache | Clear topic cache. This cache stores the topic tree for a department. | Go |

Verification Steps

Step 1. Log in as agent and initiate anonymous chat.

Step 2. Click on **Link customer** and verify newly added options appear on window.

Main Inbox | Chat Inbox | Available for Chat Mail

| Key | Activity ID | Customer Name | Activity Duration | Chat Status | Time Waiting For Reply | Queue Name |
|-----|-------------|---------------|-------------------|--------------------------|------------------------|------------|
| 1 | 1067 | | 00:01:35 | Waiting for you to reply | 00:01:09 | Chat queue |

Complete Transfer Leave Link Customer Notes

System (03:47 AM): Chat has been initiated by anonymous customer.
Customer (03:47 A): hello
Customer (03:47 A): hello

Link Customer

| Name | Operator | Value |
|-----------------|----------|-------|
| Email address:* | = | |
| First name:* | = | |
| Last name:* | = | |
| Phone number:* | = | |

Search Cancel Help

Send