Chat and Email Related Tasks

Chat and Email Control Gadget

The Chat and Email Control gadget provides the following functionality:

- Chat and Email state: The Chat and Email state is different from the Voice state that is displayed below the agent name. The following are the states:

  - Not Ready:

    - You are set to this state by default when you sign in to the Cisco Finesse desktop.

    - If you refresh the browser, all the active chat sessions are cleared, email sessions are requeued, and you are moved to this state.

    - You can move to this state when you are not ready to handle chat and email.

  - Ready: You can move to this state when you are ready to handle chat and email.

  - The agent must be in Not Ready state to Logout from Finesse.

  - When an agent accepts the chat, the state of the agent changes to Reserved.

- Time-to-accept counter: When you receive an incoming chat, the time counter is displayed in the pop-over notification and you must accept the chat within the specified time. If you do not accept the chat within the specified time, your state changes to Not Ready.

- Customer details: When an incoming chat arrives on your desktop, the customer details are displayed.

The buttons in the control area:

- When an incoming chat request arrives, the Accept button, time-to-accept counter, and customer details appear for you to accept the chat.

Accept a Chat

When a customer initiates a chat session from a website, Unified CCX Web Chat:

- Sends incoming chat to an available agent.

- Plays an audio alert.

- Displays contact details of the customer.

- Prompts agent to accept chat before the time counter expires.

- Sends incoming chat from Facebook Messenger to an available agent with a distinct icon that differentiates Facebook Messenger chat from a regular chat.

  - Only agents can end Facebook Messenger chats. Customers can't end chat.

  - Agent can't see typing indicator from the Facebook user. However, Facebook user can see typing indicator from the agent.

  - Facebook user sees the business entity name in the chat. Agent name is not displayed to the Facebook user.

  - Group chat is supported in Facebook Messenger chat, however Facebook user continues to see the business entity name.

You are presented with incoming chats until you reach the maximum active chat sessions that are set by administrator.

Note   The maximum length of a chat message from the agent is 1500 unicode characters.

Procedure

Step 1   Click **Accept** in the incoming chat pop-over notification box within the specified time to accept the chat.

The Manage Chat and Email gadget opens, chat session starts, and you are connected to the customer.

Note   Repeat Step 1 when you are presented with a new incoming chat.

A new tab opens for the chat session and new chat session becomes the current session.

Step 2   To end the chat session, click **End**.

When an Agent does not accept the chat, state of the digital channels changes to Not Ready. When the chat is timed out, the state automatically changes to Not Ready with a warning badge as **Chat Not Accepted**.

What to do next

Note   Customer can rate the chat experience. The chat rating is updated in an Activity (POD) in Context Service. The prerequisite is that the organization must be registered for Context Service.

Accept an Email

You must be in Ready state to receive an email contact. When an email contact arrives on your desktop, it is automatically accepted and you would be notified by a pop-over notifictaion.

To view the contact, you must click the **Manage Chat and Email** tab to go to the Manage Chat and Email gadget. If you have more than one contact assigned to you, in the left panel, click the tab for the email contact that you want to view.

Manage Chat and Email Gadget

The following figure shows the Cisco Finesse Manage Chat and Email gadget for agents.
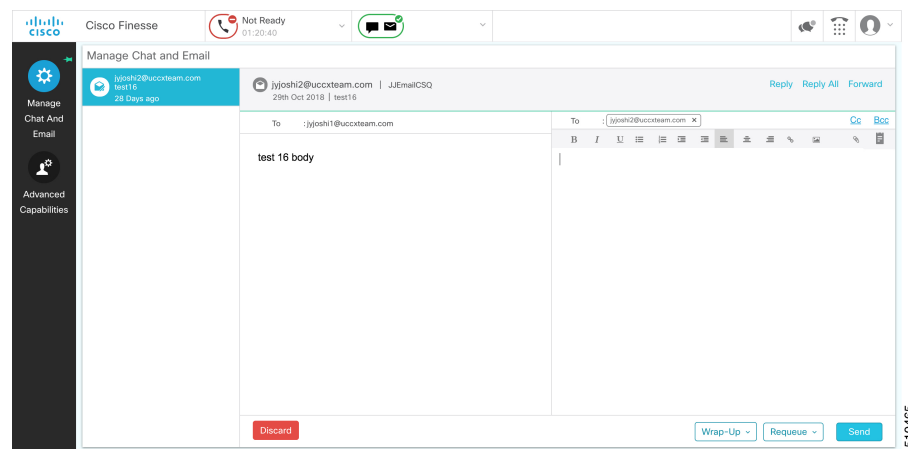
The Manage Chat and Email gadget allows you to manage chat and email contacts. Chat and email contacts that are assigned to you appear in tabs on the left. You can click each individual tab to view and reply to the contact.

Chat contacts are denoted by a chat icon. The following information appears on each chat contact tab:

- Customer name

- Total chat time: Indicates the duration of the chat session.

- New message indicator: If you receive a message on a chat contact that is not your current contact, the tab flashes for a few seconds. A number appears on the tab that indicates how many messages the customer sent since you last replied.

Email contacts are denoted by an envelope icon. When you begin typing a reply to the email contact, a pencil icon appears on the envelope icon.

The following information appears on each email contact tab:

- Customer information: Customer email address, customer name (if available).

- Email timestamp: Indicates the time that the system received the email contact.

- Email subject: Hovering the mouse over the email tab, displays the subject of the email in a tool tip.

Note	When you accept a chat request, Finesse automatically switches to the Manage Chat and Email tab and the chat becomes the active contact. When you are assigned an email contact, Finesse does not switch tabs and the contact does not become the active contact.

Chat Interaction Panel

The following figure shows the Chat Interaction panel of the Manage Chat and Email gadget.

Figure 1: Chat Interaction Panel
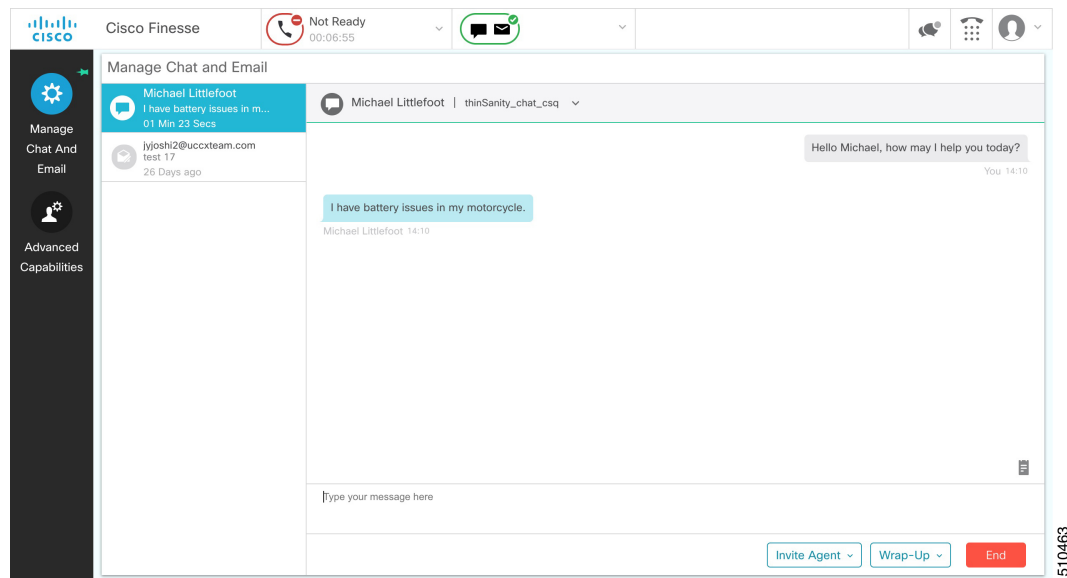
The Chat Interaction panel provides the following functionality:

- Typing area: Type your message in the typing area. Right-click to perform basic clipboard operations, and to check spelling.

- The typing awareness indicator shows when the other participant is typing.

- Group Chat icon: Allows you to initiate a group chat with another agent or supervisor.

- Group Chat invite appears for the agent to accept or decline the invite.

- In Group Chat, an agent can click **Leave** to leave the group chat whenever required.

- Predefined responses: Click ▤ to select a predefined response from the list. When you insert a predefined response, it is placed at the position of your cursor.

- End chat session: Click **End** to end a chat session.

- Customer details area: Click the drop-down arrow next to the customer details to minimize or maximize this area.
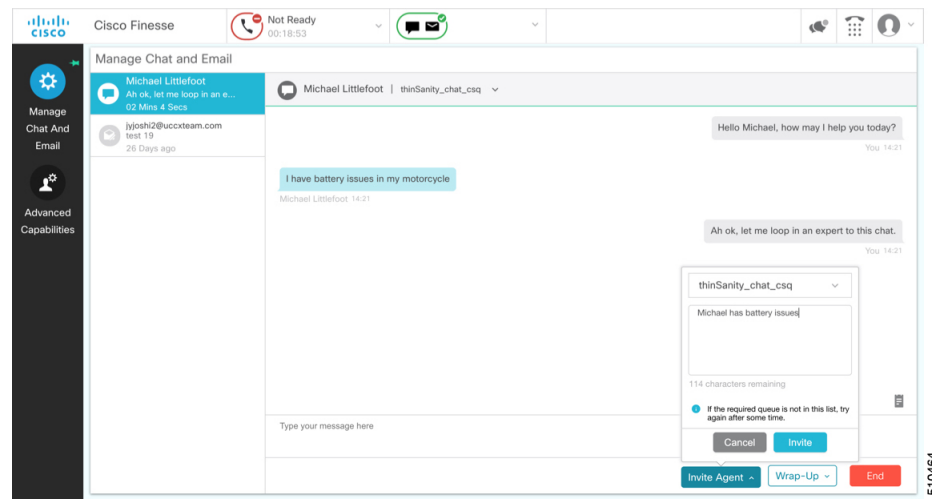
Initiate a Group Chat

You can initiate a Group Chat when you wish to involve another agent in an ongoing chat session to support the customer. This can be used for seeking further information or support for the ongoing chat. A group chat enables you to:

- Send a chat invite to an available agent of the selected CSQ.

  The CSQ names are displayed with the number of available agents in that CSQ.
- Enter the summary of the ongoing chat for the invited agent. This helps the invited agent to understand the context of the ongoing chat.

Figure 2: Initiate Group Chat Invite Interface

Procedure

Step 1   Click **Invite Agent** icon to initiate a group chat with another agent or supervisor.

Step 2   **Select a Queue** from the list to invite any available agent to join the chat session.

Step 3   You may enter a summary of the chat in the **Enter Notes** text box. This helps the invited agent to know the context of the chat. This is optional.

Note   The summary notes are visible only when the first agent enters the notes when the chat session was initiated.

The notes entered by the invitee is displayed only to the invited agent.

Step 4   Click **Invite Agent**.
The available agent gets a notification to **Accept** or **Decline** the chat. When an available agent accepts the group chat, the three participants (the two agents and the customer) may exchange information in the chat window.

Step 5   To leave the chat session, click **Leave**.

When there is only one agent and the customer in the chat session, the chat can be ended by the Customer or the Agent by clicking **End**.

Accept a Group Chat

You will receive an incoming group chat notification on the Finesse desktop. You may see the notes of the ongoing chat along with the invite. This helps you to understand the issue for which the group chat was initiated by the inviting agent.

Procedure

Step 1	Click **Accept** when you see the new group chat pop-over notification to join the chat session.
	The agent can see chat history upto 100 messages after joining the group chat.
Step 2	You may now exchange information with the other two participants (inviting agent and the customer).

Note
- The **Invite Agent** icon is disabled till the time there are two agents in the ongoing chat. Only when one agent chooses to leave the chat session, the **Invite Agent** icon will be enabled again. The agent who wishes to leave the chat session may choose to click **Leave**. The agent who is still active in the group chat session can initiate another group chat by following the steps detailed in the **Initiate a Group Chat** section.

- The maximum number of participants in a Group Chat including the customer is three (3).

- The notes are not persisted for any subsequent chat sessions with the same customer.

Decline a Group Chat

You will receive an incoming group chat notification on the Finesse desktop. You may also see a summary of the ongoing chat along with the invite. This will help you to know the issue for which the group chat was initiated by the inviting agent.

Procedure

Click **Decline** when you see the new group chat pop-over notification to decline the chat invite.

Note The agent who declined the group chat invite is not offered any successive group chat invites for the same chat session till another agent accepts a group chat invite for the same chat session.

Apply Wrapup Reasons for Chat and Email

Wrap-Up Reasons are the logical explanations that you can apply when you wrap up the chats and emails handled by you. If your administrator has assigned Wrap-Up Reasons for you, the Wrap-Up Reasons appear in the drop-down list that can be selected. If there are no Wrap-Up Reasons configured by the administrator, it appears blank.

Wrap-Up Reasons that your administrator modifies is available only to the new contacts and not for the contacts that you are currently handling.

Procedure

Step 1   Click **Wrap-Up**.

In a chat interaction panel you see the **Wrap-Up Reasons(0)** beside the **End** and in a group chat interaction panel beside the **Leave**. In an email reply panel, this is found beside the **Send**. The number in brackets indicates the count of Wrap-Up Reasons selected. This dynamically changes based on your selection.

Step 2   Select the appropriate Wrap-Up Reasons from the drop-down list.

Step 3   Click **OK** to close the Wrap-Up Reasons selection pane.

You can change your selection at any time. Click **Wrap-Up Reasons(0)**; to open the Wrap-Up Reasons selection pane. You can select a maximum number of five (5) Wrap-Up Reasons.

Email Reply Panel

The customer email appears on the left. The area where you type the response appears on the right. After you begin your reply, Finesse automatically saves a draft of your message every 3 minutes.

Note   Do not close or reload the browser when you reply to an email or when the email loads on the desktop.

The Email Reply panel provides the following functionality:

Name	Description
Requeue	Requeues an email contact to a new CSQ.
Discard	Discards an email.
Reply	Sends a reply to the email address of the customer.
Reply All	Sends a reply to the customer and to all other email addresses that the customer had included in the original email.
Cc	Allows to include other email addresses to send a copy of the email to them.
Bcc	Allows to include other email addresses to send a blind copy of the email to them.

Name	Description
Forward	Forwards an email to other email addresses.
Bold	Applies bold to the selected text.
Italic	Applies italics to the selected text.
Underline	Underlines the selected text.
Bulleted List	Inserts a bulleted list.
Numbered List	Inserts a numbered list.
Increase Indent	Increases the space between the left margin and the content.
Decrease Indent	Decreases the space between the left margin and the content.
Align Left	Aligns the content to the left margin.
Align Center	Aligns the content to the center.
Align Right	Aligns the content to the right margin.
Add/Edit Link	Creates or modifies a hyperlink of the selected text to the specified URL.
Add Image	Adds a specified image to your reply.
Attach a file	Attaches a specified file to the email reply.
Predefined Response	Inserts a predefined response into your reply. **Note** If a Predefined Response is not configured, this button is disabled. If the email is in Plain text format, this button is disabled.
Send	Sends your reply to the customer.

Reply to an Email Contact

Procedure

Step 1   On the Manage Chat and Email gadget, click the email contact that you want to reply to.

Step 2   Click **Reply/Reply All** to reply to the email address of the customer or to any other email addresses copied by the customer. You may modify or add email addresses in the **To** field. You may also include **Cc** and **Bcc** to include more email addresses by clicking the respective fields.

The maximum number of recipients allowed per field (**To**, **Cc**, and **Bcc**) is 20.

Step 3   In the Email Response area, enter your response to the customer.

You can use a predefined response or type your own response.

Note	If you select a predefined response, then the existing content of the reply is overwritten by the predefined response text.
	If **Email Signature** is configured, this is appended at the end.

Step 4   When you are finished, click **Send**.

Forward an Email

Procedure

Step 1   On the Manage Chat and Email gadget, click the email contact that you want to reply to.

Step 2   Click **Forward** to forward an email to add any other email addresses that you may want to send the email to. You may modify or add email addresses in the **To** field. You may also include **Cc** and **Bcc** to include more email addresses by clicking the respective fields.

Note	• The maximum number of recipients allowed per field (**To**, **Cc**, and **Bcc**) is 20.
	• No further attachments can be attached to the outgoing emails.
	• The **Reply To** field is modified appropriately such that the recipient of the forwarded email can reply to the original sender of the email directly and not send it back to the Contact Center.
	• The **Requeue** is disabled if you have initiated to forward the email. You must cancel **Forward** and click **Reply/Reply All** to requeue the email.

Step 3   In the Email Response area, enter your response.

You can use a predefined response or type your own response.

Note	If you select a predefined response, then the existing content of the reply is overwritten by the predefined response text.
	Email Signature is appended to the outgoing email as configured by the Administrator.

Step 4   When you are finished, click **Send**.

Download Customer Attachments

If a customer includes attachments in an email, the attachment filenames appear under the subject of the email. Finesse imposes the following limitations on customer email attachments:

• The total file size limit in an agent's reply is 20 MB.

Note	Images within the body of the email are counted as attachments.

• The size limit of a single file attachment is 10 MB.

• The total size limit of attachments in the incoming email from the customer is 20 MB.

Procedure

Step 1	Click the filename of the attachment you want to open or download. You are prompted to open or save the file.
Step 2	Choose whether to open the file or save the file to your computer.
Step 3	Repeat Step 1 and Step 2 for each attachment that you want to open or download.

Insert a Hyperlink to an Email

Procedure

Step 1	In your email reply, select the text that you want to turn into a hyperlink.
Step 2	Click the **Insert/Edit Link** icon. A dialog box opens where you can enter the URL for the link.
Step 3	In the dialogue box, enter the URL for the link.
Step 4	Click **Add**.

Insert an Image to an Email

Procedure

Step 1	Place your cursor where you want the image to appear.
Step 2	Click the **Insert Image** icon. A dialog box opens where you can enter a URL for the image.
Step 3	In the dialogue box, enter the URL.
Step 4	Click **Add**. The image appears inline in the email response. You can also copy and paste an image into the email response.

Add an Attachment to an Email

You can add up to 10 attachments to an email reply to a customer. The following limitations apply:

      • The size of a single attachment must not exceed 10 MB.

      • The total size of all attachments must not exceed 20MB.

Procedure

Step 1	Click the **Attach File** icon.
Step 2	Navigate to the file that you want to attach to the email.
Step 3	Click **Open**. The file appears below the reply panel.
Step 4	Repeat Step 1 and Step 2 for each file that you want to attach (up to 10).

If you want to remove an attachment, click the **X** to the right of the attachment filename.

Requeue an Email Contact

You can requeue an email contact either to the same Contact Service Queue (CSQ) or to any other CSQ. After you initiate the requeue from the agent desktop, the contacts are requeued to a CSQ.

Last-agent email routing is a mechanism to route an email message to the agent who last handled the email conversation. When you requeue an email, the email will be routed to the intended CSQ to be handled by any available agent, and last-agent email routing is not considered.

Note The requeued contact is not requeued to the same agent even if the agent is part of the requeued CSQ and is available to handle more contacts.

When you sign out or refresh your browser, any contacts that you were handling are disassociated from you and requeued to the same CSQ.

Procedure

Step 1	Select the email that you want to requeue.
Step 2	Click **Requeue**. The list of CSQs is displayed with a search option.
Step 3	Type the CSQ name in the **Search** box to select the desired CSQ from the list. A confirmation dialog appears.
Step 4	Click **Yes** to confirm.

The email is removed from the chat and email navigation pane and requeued to the selected CSQ.

Discard an Email Message

Procedure

Step 1 On the **Manage Chat and Email** gadget, select the email message that you want to discard.

Step 2 Click **Discard** icon on the Email Reply panel.

You are prompted to discard the selected email message.

Step 3 Click **Yes** to confirm.

The email message is discarded.

When you discard an unsent reply that has attachments, the draft of the reply from the agent and the attachments are deleted. The original email message sent by the email contact remains in the Exchange mailbox.