Manage Chat Contacts

About the Chat Channel

You can use Agent Desktop to receive and respond to customer chat requests depending on the permissions in your multi-media profile setting. These permissions are managed by the Organization Administrator using the multi-media profile setting in the Webex Contact Center administration portal.

Respond to a Chat Contact

When you receive a chat request from a customer, a notification dialog box appears in the **Active Contact List** under the **Chat** tab. You can also view the request under the **All** tab in the Agent Desktop. The dialog box displays the name of the customer, the queue that routed the chat to you, and a timer indicating how long the chat is awaiting your acceptance.

Note The system assigns the chat to you based on the configuration of the chat bot. For more information on chat bot configuration, see Configure Cisco Webex Contact Center Customer Virtual Assistant.

Before you begin

Your status should be **Available** to receive any chat request.

Procedure

Step 1 In the **Active Contact List**, click **Accept**.

The chat conversation appears. The chat label displays the name of the customer you are chatting with. It also displays the conversation that the chat bot had with the customer before the system assigned the chat to you.

Step 2 (Optional) Click **Info** to view the contact information of the customer.

Step 3 (Optional) Click **History** to view the contact history of the customer.

Step 4 Enter your response in the editor and click **Send** or press **Return** on your keyboard. You can also use the following settings to configure your response before sending:

Note **Security Compliance**

If the content is identified as containing data that violates the Payment Card Industry Data Security Standard (PCI DSS), then:

- The chat attachment is not sent.
- The chat conversation is masked.

As part of security compliance, the PCI DSS does not permit you to send sensitive information such as credit card data and other personally identifiable information (PII).

Setting	Description
Attachment	**Note** • If you cannot see the **Attachments** icon, contact your We Contact Center administrator.. Click the **Attachments** icon to add attachments to your res You can upload multiple files and the total file size must b than 35 MB. • The supported file formats are: .html .mhtml .mht .odt .pd .pdfxml .rtf .shtml .xps .xml .xhtml .txt .eml .msg .ods .do .dothtml .dotx .dotm .pot .pothtml .ppthtml .pptmhtml .pp .potm .potx .pps .ppam .ppsm .ppsx .pptx .pptm .ppt .pub .pubhtml .pubmhtml .xls .xlshtml .xlthtml .xlt .xlsm .xltx .xlam .xlsb .xlsx
Predefined Chat Responses	Click the **Predefined Chat Responses** icon. A list of standard responses p Scroll down or use the search box to find the appropriate response. Hover o response to view the detailed message. Click any response to insert it in the You can edit the response before sending it to the customer. Click outside the pop-up window to close it. **Note** You can add only one response at a time. The system enables the **Predefined Chat Responses** icon only if your admin has configured any chat responses for your queue.

Step 5 (Optional) You can also do the following:

- Transfer the chat to another agent. For more information, see Transfer a Chat, on page 5.
- Add another agent to start a chat conference. For more information, see Start a Conference with Another Agent, on page 3.

Step 6 Close the chat after you help your customer with their queries. For more information, see End a Chat Session, on page 3.

The Organization Administrator can configure the time within which you have to accept the chat request from your customer. If you exceed the configured time, then the notification dialog box blinks for some time in the Active Contacts List. Then the system changes your status to Ring On No Answer or RONA. RONA is based on the timeout setting that your Organization Administrator configures. If you want to receive new contacts of any media channels, including chat, you have to manually change your status to Available.

Note You can manually change your status to an idle state, for example, when you complete any other task, such as chat with a customer, or when you are wrapping-up the chat request. For more information, see About Agent States.

End a Chat Session

After you have helped your customer with their queries, it is a best practice to ask the customer to close the chat session. When the customer closes a chat session, a message appears in the chat conversation indicating that the customer has left the chat. You must close the chat session in the Agent Desktop and enter the wrap-up information. If necessary, you can also end the chat. In that case, the customer sees a message saying that the agent has left the chat.

To close a chat session in the Agent Desktop:

Procedure

Step 1 In an active chat session, click **End**.
The **WRAP UP** page appears.

Step 2 From the **Select Wrap Up** drop-down, select the reason for ending the conversation.
When you select the reason, the conversation ends.

For more information, see Wrap-Up Email and Chat Conversations.

Start a Conference with Another Agent

You can request assistance from a colleague during a chat session by setting up a chat conference between the customer, yourself, and the other agent.

To invite other agents to join an active chat session:

Procedure

Step 1 Click **Conference**.
The **Conference Request** dialog box appears.

Step 2 Select an agent from the **Choose an agent** drop-down list.

Note You can only invite agents who are currently available in your queue. If the agent does not accept the conference chat request, the system assigns it to any other available agent from your queue.

Step 3 Click **Start Conference**.

A message will be displayed to you and the customer, indicating that the agent has joined the chat.

The following table records the actions that each user can perform during a conference chat:

Agent 1—Refers to the agent who starts a conference chat.

Agent 2 —Refers to the consulted agent who is part of the conference chat.

Role	Summary
Customer	• A customer cannot initiate a conference chat. • The customer can drop from an ongoing chat with Agent 1 and Agent 2, thereby ending the interaction.
Agent 1	• Agent 1 can start and end a conference chat. • Agent 1 can end a conference chat by clicking the **End Conference** button. The customer and Agent 2 are dropped from a conference chat. • When a customer drops from a conference chat, the interaction ends, and the compose box is disabled for the agents. Agent 1 to end the conference by clicking the **End Conference** button, and Agent 2 is dropped from a conference chat.
Agent 2	• Agent 2 cannot end a conference chat. • Agent 2 cannot apply a wrap up reason for a conference chat. • Agent 2 can end a conference chat by clicking the **Exit Conference** button. The chat continues between Agent 1 and the customer. • If a customer drops from a conference chat, the interaction ends. Agent 2 is dropped from the chat without wrap up.

End a Chat Conference with an Agent

After you get assistance from your colleague, you can end the conference.

To end an active chat conference:

Procedure

Step 1 Click **Conference**.

The consulting agent can also end the conference by clicking **Conference**.

A message appears in the chat conversation that an agent has left the chat. The customer sees a message that an agent has left the chat.

Step 2 Click **End** to end the chat session with the customer.
The **WRAP UP** page appears in your window. The customer sees a message that an agent has left the chat.

The customer sees the display name of the agent in their screen. For more information on your display name contact your administrator.

Step 3 From the **Select Wrap Up** drop-down, select the reason for ending the conversation.
When you select the reason, the conversation ends.

Note Only the consulting agent can end the chat conference and not the consulted agent.

Transfer a Chat

If you cannot resolve a customer query and want to escalate the chat session to a different agent or supervisor, you can transfer the chat. The current transfer is blind transfer, where once you transfer you cannot track the chat. You can transfer the chat to an agent within your queue or to another active queue.

You can also transfer the chat to another queue. When you choose to transfer the chat to another queue, you can see all the queues in your enterprise.

To transfer an active chat session to another agent or a queue:

Procedure

Step 1 Click **Transfer**.
The **Transfer Request** dialog box appears.

Step 2 Do one of the following:

- Select the **Agent** radio button to transfer the chat to an agent.

  Note You can only transfer to agents who are currently available in your team. If the agent does not accept the chat request, the chat ends and the customer sees a message that the agent has left the chat.

  The agent should accept the transfer request within the RONA timeout setting. Else the system ends the chat, and the customer sees a message that the agent has left the chat.

- Select the **Queue** drop-down to transfer the chat to another queue.

  You can hover the mouse over a queue name to view the description of the queue.

  When you choose to transfer the chat to another queue, you can see all the queues in your enterprise.

Step 3 Click **Transfer**.

The **WRAP UP** page appears in your window. The customer sees a message that the original agent has left the chat and a new agent has joined the chat.

Step 4 From the **Select Wrap Up** drop-down, select the reason for ending the conversation.

When you select the reason, the conversation ends.

End a Video Call with Customer

You can end the video call after helping the customer, but it is a best practice to ask your customer to close the video call.

To end a video call with a customer:

Procedure

Click the cross in the video call window.
The customer sees a message that the agent has left the video call. If the customer ends the video call, you see a message that the customer has left the video call.

You can continue chatting with the customer after ending the video call.