Manage Chats and Emails (Deprecated)

Manage Chats

You can use the desktop to receive and respond to customer requests through chats. Your administrator defines the permissions in your multimedia profile settings to access chats.

Respond to a Chat

When you receive a chat request from a customer, the contact request popover displays the (Chat) icon, the name of the customer or unique id, the email address, the queue that routed the chat to you, and a timer indicating how long the chat has been awaiting your acceptance.

If the customer is using a chatbot, it provides preset answers before an agent responds to the customer. If you do not accept the chat request within the maximum available time, the chat request is returned to the queue and the system changes your state to **RONA**. A popover appears with options to change your state to either **Available** or **Idle**. For more information on RONA popover, see Agent Availability States.

Note When you are in the **RONA** state, you cannot receive any more contact requests. To receive requests of any media channels including new chats, you must manually change your state from **RONA** to **Available**.

Security Compliance

To ensure security compliance, the Payment Card Industry Data Security Standard (PCI DSS) does not permit you to receive or send sensitive information such as credit card data and other personally identifiable information (PII). If the content is identified as containing data that violates the PCI DSS, then:

- The chat attachment is not sent (dropped).

- The chat conversation is redacted (masked).

Note Based on the configuration defined by your administrator (redact or drop), the chat message including the attachment is dropped, or the specific content is redacted.

Before you begin

You must be in the **Available** state to receive any chat request.

Procedure

Step 1 In the chat request, click **Accept**.

The chat conversation and the Interaction Control pane appears. The Workspace pane displays the details of the customer with whom you are chatting. It also displays the conversation that the chatbot had with the customer before the system routed the chat request to you.

Note The chatbot response is displayed with the label. For example, **Customer Virtual Assistant**. You can scroll through the customer's chat to view the chat history.

Step 2 Enter your response in the compose box.

Note Your message cannot exceed the 1000 character limit.

Step 3 Click **Send** or press **Enter** on your keyboard.
The customer receives the response along with the agent's name.

Note If your administrator has configured predefined chat templates, you can use these templates to communicate with the customers. For more information, see Predefined Chat Responses, on page 3.

Step 4 (Optional) Click **Attach Files** to upload files along with your response in the compose box.

a) To remove an uploaded file, click ✕.

Note • Your chat conversation and the attachments must be PCI compliant. For more information, see Security Compliance.

• The **Attach Files** icon is available if your administrator has enabled you to send attachments. You can upload multiple files and the total file size must be less than 35 MB. The supported file formats are:

.html .mhtml .mht .odt .pdf .pdfxml .rtf .shtml .xps .xml .xhtml .txt .eml .msg .ods .dot .dothtml .doc .dotx .dotm .pot .pothtml .ppthtml .pptmhtml .pptxml .pps .ppam .ppt .pub .pubhtml .pubmhtml .xls .xlshtml .xlthtml .xlt .xlsm .xltx .xltm .xlam .xlsb .xlsx

• If you try to navigate away when you have an unsent attachment or text in the compose box, you are alerted by a message.

Step 5 (Optional) Click the **Contact History** tab in the Auxiliary Information pane to view the contact history of the customer. For more information on the **Contact History** tab details, see Auxiliary Information Pane.

Step 6 (Optional) You can perform the following tasks in the Interaction Control pane:

• Transfer a chat request to a queue or an agent. For more information, see Transfer a Chat, on page 3.

- Initiate a three-way communication between you, the customer and another agent. For more information, see Start a Chat Conference, on page 4.

Step 7 Click **End**. For more information, see End a Chat, on page 5.

Predefined Chat Responses

The administrator defines the predefined chat messages that you can use to communicate with the customer.

Procedure

Step 1 Click **Predefined Chat Responses**.

Step 2 You can either select the required message from the drop-down list or use the search field to filter the list.

Note You can add multiple predefined responses to compose a single response during your chat with a customer.

Step 3 (Optional) You can edit the response before sending it to the customer.

Transfer a Chat

If you cannot resolve a customer query and want to escalate the chat request, you can transfer the chat request to another agent or supervisor.

To transfer an active chat request to a queue or an agent:

Before you begin

You must have accepted the chat request. For more information, see Respond to a Chat, on page 1.

Procedure

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

Step 2 Choose from one of the following:

- **Queue**—You can either select the required queue from the drop-down list or use the search field to filter the list. The drop-down list displays the queues that are available to transfer the chat request.

- **Agent**: You can either select an agent from the drop-down list, or use the search field to filter the list. The drop-down list displays the names of available agents. The agent name is preceded by a green icon. For more information, see Agent Availability States.

Step 3 (Optional) Click the ↻ (**Refresh the List**) icon to retrieve the most recent list of queues and agents.

The retrieved list displays the current agent availability states.

Step 4   Click **Transfer**.
The transfer request is initiated and the **Wrap Up Reasons** dialog box appears. For more information, see Apply a Wrap-Up Reason.

Note   Once you transfer the chat request to an agent, if the agent does not accept the chat request, the chat request is dropped.

Start a Chat Conference

To create a three-way conference chat request between you, the customer and another agent:

Before you begin

You must have accepted the chat request. For more information, see Respond to a Chat, on page 1.

Procedure

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

Step 2   You can either select a specific agent from the drop-down list or use the search field to filter the list. The agent name is preceded by a colored icon indicating the current availability state. For example, the **Available** state is preceded by a green icon. For more information, see Agent Availability States.

Step 3   Click **Conference**.

When the conference chat request is accepted by an agent, the Interaction Control pane changes the state from **Conference Requested** to **Conference**. The customer and you can see a message that an agent has joined the chat.

Step 4   Click **End Conference**.
The **Wrap Up Reasons** dialog box appears. For more information, see Apply a Wrap-Up Reason.

Note   • Only you can end the chat conference and not the agent with whom you have conferenced.

• The conferenced agent can exit the chat conference by clicking **Exit Conference**. The chat continues between you and the customer.

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

After you have helped your customer with queries, it is a good practice to ask the customer to end the chat session. When the customer ends the chat session, a message appears in the chat conversation indicating that the customer has left the chat.

When you end the chat session, the **Wrap Up Reasons** dialog box appears. 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:

Before you begin

You must have accepted the chat request. For more information, see Respond to a Chat, on page 1.

Procedure

Step 1	In the active chat session, click **End**. The **Wrap Up Reasons** dialog box appears.
Step 2	You can either select the required reason from the drop-down list or use the search field to filter the list. You can select more than one wrap up reason at a time.
Step 3	Click **Submit Wrap Up**. For more information, see Apply a Wrap-Up Reason.

Manage Emails

You can use the desktop to receive and respond to customer email requests. Your administrator defines the permissions in your multimedia profile settings to access customer emails.

Respond to an Email

When you receive an email from the customer, the contact request popover displays the (Email) icon, the name of the customer, the queue that routed the email to you, the email ID of the customer, and a timer indicating the time that has elapsed since you received the email request.

If you do not accept the email request within the maximum available time, the request is returned to the queue and the system changes your status to **RONA**. A popover appears with options to change your state to either **Available** or **Idle**. For more information on RONA popover, see Agent Availability States.

> **Note** When you are in the **RONA** state, you cannot receive any more contact requests. To receive requests of any media channels including new emails, you must manually change your state from **RONA** to **Available**.

Security Compliance

To ensure security compliance, the Payment Card Industry Data Security Standard (PCI DSS) does not permit you to receive or send sensitive information such as credit card data and other personally identifiable information (PII). If the content is identified as containing data that violates the PCI DSS, then:

- The email attachment is not sent (dropped).

- The email conversation is redacted (masked).

> **Note** Based on the configuration defined by your administrator (redact or drop), the email including the attachment is dropped, or the specific content is redacted.

Before you begin

You must be in the **Available** state to receive an email request.

Procedure

Step 1 In the email request, click **Accept**.
The email request opens in the email compose box, and the Interaction Control pane is displayed.

Step 2 You can respond to the email in one of the following ways:

- Quick replies provide an instant way to respond to simple queries. For more information, see Send a Quick Reply, on page 7.

- Standard replies allow you to format your text, add images to the message, attach files, and so on. For more information, see Send a Standard Reply, on page 8.

Note   If your administrator has configured a predefined email template, you can use this template to communicate with the customer. By default, the predefined response is populated in the compose box. For more information, see Predefined Email Template, on page 7.

Step 3   (Optional) Click the **Contact History** tab in the Auxiliary Information pane to view the contact history of the customer. For more information on the **Contact History** tab details, see Auxiliary Information Pane.

Note   To view an email correspondence in the **Contact History** tab, click **View email message**.

Step 4   (Optional) Transfer the email request to a queue. For more information, see Transfer an Email, on page 10.

Step 5   (Optional) Click **End**.
The **Wrap Up Reasons** dialog box appears. For more information, see Apply a Wrap-Up Reason.

Predefined Email Template

The administrator defines the predefined email template that you can use to communicate with the customer. When you click **Reply** or **Reply All**, the email body displays the predefined text (based on the configured variables) with the following details:

- Customer name

- Predefined email body

- Agent name (your name as displayed in the profile)

You can edit the template message to provide a complete and accurate response to the customer.

Note   You cannot use the predefined email template for quick-reply emails.

Send a Quick Reply

When an incoming email request requires simple response, you can send a quick reply.

Note   You cannot use a predefined email template for quick-reply emails.

To send a quick reply:

Before you begin

You must be in the **Available** state to receive an email request.

Procedure

Step 1	In the email request, click **Accept**. The email request opens in the email compose box, and the Interaction Control pane is displayed.
Step 2	Enter your response in the **Quick reply here** text box.

Note	• Your email conversation must be PCI compliant. For more information, see Security Compliance.
	• If you navigate away from the email compose box when you have content in the email body, your draft is saved.
	• The **Quick reply here** supports only plain text formatting style. For more information on rich text formatting style, see Send a Standard Reply, on page 8.

Step 3	Click **Send**. The **Wrap Up Reasons** dialog box appears. For more information, see Apply a Wrap-Up Reason.

Send a Standard Reply

You can send a standard reply if you want to format your email response, add images, attach files, or add more recipients.

To send a standard reply:

Before you begin

You must be in the **Available** state to receive an email request.

Procedure

Step 1	In the email request, click **Accept**. The email request opens in the email compose box, and the Interaction Control pane is displayed.
Step 2	Select **Reply** to send a reply only to the sender, or select **Reply All** to respond to all recipients.
	The reply email body appears. The **To** and **Subject** fields are automatically populated. You cannot edit these fields.
Step 3	(Optional) Click **Cc** to send a carbon copy of your email to more recipients.
Step 4	Enter your reply message in the email body.

Note	If your administrator has configured a predefined email template, you can use this template to communicate with the customer. By default, the predefined response is populated in the compose box. For more information, see Predefined Email Template, on page 7.

Step 5	You can customize your reply message using the rich text formatting styles. The following are the options to format your reply message:

Icons	Description
Heading 1	Applies a preset font and style to the text.
Bold	Makes your text bold.
Italic	Italicizes your text.
Underline	Underlines your text.
Strikethrough	Draws a line across your text.
Text Color	Changes the color of your text.
List By Ordered	Creates a numbered list.
List By Bullet	Creates a bulleted list.
Blockquote	Indents your text and marks it as a quotation with a vertical line at the left margin.
Table	Inserts a table in the text area. You can add or delete rows and columns in the table.
Link	Inserts a hyperlink on the selected text.
Indent Right	Indents your text to the right.
Indent Left	Indents your text to the left.

Step 6 Click **Attach Files** to upload files along with your email reply. The administrator configures the maximum file size and the maximum number of files that you can send. You can upload a maximum of ten files, and the total file size must be less than 25 MB.

a) To remove an uploaded file, click ✕.

Note
- Your email conversation and attachments must be PCI compliant. For more information, see Security Compliance.

- The supported file formats are:

  .html .mhtml .mht .odt .pdf .pdfxml .rtf .shtml .xps .xml .xhtml .txt .eml .msg .ods .dot .dothtml .doc .dotx .dotm .pot .pothtml .ppthtml .pptmhtml .pptxml .pps .ppam .ppt .pub .pubhtml .pubmhtml .xls .xlshtml .xlthtml .xlt .xlsm .xltx .xltm .xlam .xlsb .xlsx

- If you navigate away from the email compose box when you have content in the email body, your draft is saved.

Step 7 (Optional) Click **View Original Email** to view the customer email.

Note While composing an email, if you switch between **View Original Email**, and **Reply** or **Reply All**, your draft is saved.

Step 8 (Optional) Click the ellipsis button to **Show Previous Thread** or **Hide Previous Thread** conversations with the customer.

| Step 9 | Click **Send**.
The **Wrap Up Reasons** dialog box appears. For more information, see Apply a Wrap-Up Reason. |

Transfer an Email

If an email is misclassified or you cannot resolve a customer query, you can transfer the email to another queue. When you initiate the email transfer, you can select an email queue from the list of email queues in your enterprise. You cannot transfer an email to any specific agent or supervisor.

To transfer an email request to a queue:

Before you begin

You must have accepted the email request. For more information, see Respond to an Email, on page 6.

Procedure

Step 1	Click **Transfer**. The **Transfer Request** dialog box appears.
Step 2	You can either select the required queue from the drop-down list or use the search field to filter the list. The drop-down list displays the queues to which you can transfer the email request.
Step 3	(Optional) Click the ↻ (**Refresh the List**) icon to retrieve the most recent list of queues.
Step 4	Click **Transfer**. The transfer request is initiated and the **Wrap Up Reasons** dialog box appears. For more information, see Apply a Wrap-Up Reason.