



Enterprise Chat and Email Agent's Guide, Release 12.0(1) ES1

**For Unified Contact Center Enterprise and Packaged Contact Center
Enterprise**

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Preface

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Welcome to the Enterprise Chat and Email (ECE) feature, which provides multichannel interaction software used by businesses all over the world as a core component to the Unified Contact Center Enterprise product line. ECE offers a unified suite of the industry’s best applications for chat and email interaction management to enable a blended agent for handling of web chat, email and voice interactions.

About This Guide

Enterprise Chat and Email Agent’s Guide introduces you to the Agent Console and helps you understand how to use it to handle customer queries and respond to them quickly and effectively.

Change History

This table lists changes made to this guide. Most recent changes appear at the top.

Change	See	Date
Update of Document for Release 12.0(1) ES1		April 2019
Added sections on new functionality with searching for activities and cases. Buttons for these sections added to Basics chapters	“Creating Activity Search Folders” on page 70 , “Creating Case Search Folders” on page 83 , and “Console Sidebar” on page 16	
Restored ability to print case details. Description added.	“Viewing Case Information” on page 79	
Notes can be added during the process of transferring activities. Steps and descriptions of transferring chats and emails updated	“Transferring Emails” on page 49 and “Transferring Chats” on page 63	
Document Updated for Release 12.0(1)		February 2019
Added section on merging customer functionality	“Merging Customers” on page 96	
Initial Release of Document for Release 12.0(1)		January 2019
Updated link in Related Documents section to correct URL	“Related Documents” on page 10	

Related Documents

The latest versions of all Cisco documentation can be found online at <https://www.cisco.com>

Subject	Link
Complete documentation for Enterprise Chat and Email, for both Cisco Unified Contact Center Enterprise (UCCE) and Cisco Packaged Contact Center Enterprise (PCCE)	https://www.cisco.com/c/en/us/support/contact-center/enterprise-chat-email-12-0-1/model.html

Communications, Services, and Additional Information

- ▶ To receive timely, relevant information from Cisco, sign up at [Cisco Profile Manager](#).
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- ▶ To obtain general networking, training, and certification titles, visit [Cisco Press](#).
- ▶ To find warranty information for a specific product or product family, access [Cisco Warranty Finder](#).

Cisco Bug Search Tool

[Cisco Bug Search Tool](#) (BST) is a web-based tool that acts as a gateway to the Cisco bug tracking system that maintains a comprehensive list of defects and vulnerabilities in Cisco products and software. BST provides you with detailed defect information about your products and software.

Field Alerts and Field Notices

Cisco products may be modified or key processes may be determined to be important. These are announced through use of the Cisco Field Alerts and Cisco Field Notices. You can register to receive Field Alerts and Field Notices through the Product Alert Tool on Cisco.com. This tool enables you to create a profile to receive announcements by selecting all products of interest.

Log into www.cisco.com and then access the tool at <https://www.cisco.com/cisco/support/notifications.html>

Documentation Feedback

To provide comments about this document, send an email message to the following address:
contactcenterproducts_docfeedback@cisco.com

We appreciate your comments.

Document Conventions

This guide uses the following typographical conventions.

Convention	Indicates
<i>Italic</i>	Emphasis. Or the title of a published document.
Bold	Labels of items on the user interface, such as buttons, boxes, and lists. Or text that must be typed by the user.
Monospace	The name of a file or folder, a database table column or value, or a command.
<i>Variable</i>	User-specific text; varies from one user or installation to another.

Document conventions

1 Basics

- ▶ [Terms and Concepts](#)
- ▶ [Signing In and Out](#)
- ▶ [Elements of the User Interface](#)

Enterprise Chat and Email helps businesses set up multichannel customer engagement hubs to provide consistent high-quality service across all interaction channels such as email, chat, and phone.

The Agent Console is a service console and is designed specifically for use by customer service agents to handle service interactions. As an agent, this console is the only work area that you are likely to need; it provides you with all the tools and information that you need to complete activities. In this console, you can:

- ▶ Manage and respond to activities such as emails and chats
- ▶ View customer records and interaction history
- ▶ Manage cases

This chapter introduces the Agent Console and the basics of working in it. This includes:

- ▶ Logging in to the system
- ▶ Getting to know the user interface
- ▶ Setting some options as a first step towards working with activities
- ▶ Managing your availability to make sure that activities are routed to you in a way that maximizes your efficiency

Common aspects of working with activities are discussed in [“Activities” on page 65](#). Details about working with specific types of activities, such as email and chat, are discussed in the chapter dedicated to that activity type. See [“Emails” on page 34](#) and [“Chats” on page 52](#).

Terms and Concepts

- ▶ **Activity:** A unit of work, an interaction between a customer and an agent, or an interaction between a supervisor and an agent.
- ▶ **Case:** Used to group activities related to the same issue. Activities are tied to a case using a single identification number, the Case ID. A case can contain activities of various channels such as email, chat, and phone.
- ▶ **Chat:** A real time interaction between an agent and a customer where the participants exchange text messages. As part of a chat, agents can also share web pages with customers.

A chat activity is created for each chat session between a customer and an agent.

- ▶ **Customer:** A business object in the application that corresponds to a person who contacts the organization to purchase products and services, request support or information, or lodge complaints.

In the Agent Console, there is a pre-defined Customer page that displays the customer’s name, email address, phone number, etc.

- ▶ **Email:** An electronic communication. There are two types of emails in the application.
 - **Inbound emails:** Emails received by the company from customers.
 - **Outbound emails:** Emails sent by agents or the system on behalf of the company to customers.

An email activity is created for each email that comes in to, or leaves, the system. Separate activities are also created for emails that go through supervisory loops that allow supervisors to review outbound email.

- ▶ **Notes:** Brief comments added to a business object. Notes are added to activities, cases, and customer profiles. They are meant for internal use and can be used to share tips and information with other agents or supervisors.

Signing In and Out

Before Signing In

Before signing in to the ECE Agent Console, you may need to configure your computer and browser settings.

- ▶ Make sure that JavaScript is enabled. Consult your administrator for further assistance.
- ▶ Make sure that your browser's pop-up blocker be disabled.
- ▶ Ensure that your browser is configured to allow all third-party cookies.
- ▶ Configure your browser to accept the Finesse server URL as a trusted URL. For more information about how to configure this, see *Cisco Finesse Desktop User Guide for Unified Contact Center Enterprise*.

Signing In

Once everything is properly configured, to sign in to the ECE Agent Console, you can sign in to Finesse and access the ECE gadget in the Finesse toolbar.

You can also access the agent gadget outside of Finesse, however, please be aware of the following:

- ▶ Agents can mark themselves available or unavailable in the gadget. For more information about availability, see [“Managing Availability” on page 24](#).
- ▶ Notifications for email and chat should be enabled in the settings instead of using Finesse popover and toaster notifications. The **Alert Agent When Activity Is Assigned** setting in the Administration Console is enabled by default. For more information, see *Enterprise Chat and Email Administrator's Guide to Administration Console*.
- ▶ Finesse SSO configurations for agents are not supported outside of Finesse. Agents who are SSO-enabled cannot sign into the ECE Agent Console outside of Finesse.

To sign in to the Agent Console through Finesse:

1. Access the Finesse URL from a browser and sign in to Finesse: `https://Finesse_Server_Name/desktop`.
2. Click the **Manage Chat and Email** tab in the Finesse toolbar. If single sign-on is enabled, you are logged in automatically. If single sign-on is not enabled, enter your username and password in the appropriate fields. These fields are case sensitive. Once you have entered your credentials, click the **Sign In** button.


If Knowledge is enabled in your system, the Solve gadget in the Finesse toolbar may also be available for you to access upon signing in. This can also be accessed by clicking the **Solve** button in the Reply area while responding to emails or chats. For more information about Solve, contact your Cisco account manager.

To sign in to the Agent Console outside Finesse:

- ▶ Access the ECE URL from a browser and sign in in: `https://ECE_Web_Server_Name/desktop`.

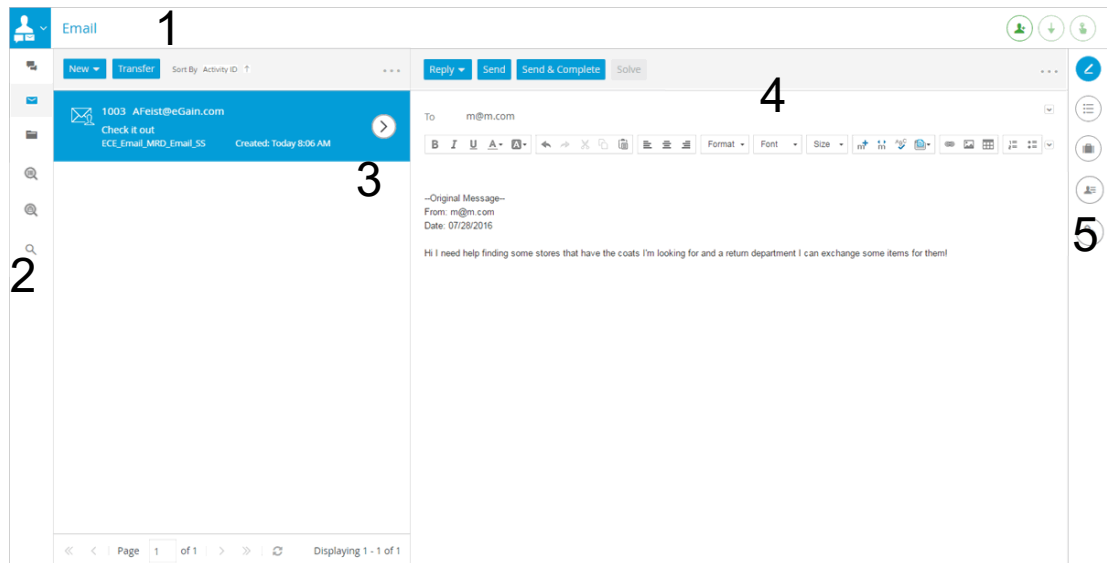
Signing Out

To sign out of the Agent Console:

- ▶ Perform one of the following:
 - To sign out of the ECE Agent Console while in Finesse, you must sign out of Finesse. For more information about signing in and out of Finesse, consult your Finesse User Guide.
 - To sign out of the ECE Agent Console outside of Finesse, click the **User Options**  button and select the **Sign Out** option.

Elements of the User Interface

The Agent Console screen has five elements or functional areas.







The Agent Console

1. Console toolbar
2. Console sidebar
3. Inbox
4. Reply area
5. Information bar

Console Toolbar

The Console toolbar provides methods of getting work, adjusting personal settings, updating customer information, and logging out of the console. Agents can pick individual activities or pull activities from a queue or user with the corresponding buttons available. They can also create new customers in the system and provide the necessary details about customers between email and chat activities.





The different sections of the application that are accessed from the Console toolbar are explained here.



Use	To
 User Options button	Perform the following tasks <ul style="list-style-type: none">▶ Adjust your preferences and options▶ Toggle the sidebar
 Pick button	Manually select the email activities to pull into your inbox list. You may be able to select activities from a specific queue or user, depending on the MRD to which you belong. For details, see “Picking and Pulling Emails” on page 35
 Pull button	Pull the next set of email activities into your inbox list. The activities that get pulled are determined by selections made in the Pull Options tab of the Options window. For details, see “Picking and Pulling Emails” on page 35
 New Customer button	Create a new customer and provide basic customer details to add to the system. For details, see “Creating Customers” on page 95 .

Console Sidebar

The console sidebar provides access to the Chat inbox, Email inbox, Search page, and Folders list. The inbox, Information bar, and Reply area have their own toolbars for tasks that you would perform in these areas.

The different sections of the application that are accessed from the console sidebar are explained here.

Use	To
	Open the Chat inbox. The inbox refreshes to show all chat activities currently assigned to the user. From here, the agent can select chat activities and begin working on them in the Reply area.
	Open the Mail inbox. The inbox refreshes to show all email activities currently assigned to the user. From here, the agent can select email activities and begin working on them in the Reply area.
	Open the Folders list. Through the list Folders list, agents can look over various activities they sent or completed, as well as their open and close cases assigned to them.
	Open the Search page. In the Search window, you can run searches to locate activities, cases, customers, etc.

Use	To
	Open the My Activity Searches folders menu. Folders created here act as saved searches for activities that can be accessed again by the agent at any time. In the top menu, create new, edit, and delete search folders.
	Open the My Cases Searches folders menu. Folders created here act as saved searches for activities that can be accessed again by the agent at any time. In the top menu, create new, edit, and delete search folders.

Inbox

The inbox displays a list of email or chat activities depending on the selection made in the sidebar.

Buttons displayed in the inbox list change based on the selected activity type. For example, the buttons that are available for Chat activities are different from those available for Email activities.

Email Inbox

The inbox toolbar includes the following buttons.

Use	To
New button	Create a new outbound email activity. Activities can be created using the this button or using one of the following items or their shortcut keys: <ul style="list-style-type: none"> ▶ Outbound Email for Current Case (Shortcut key: F4) ▶ Outbound Email for New Case (Shortcut key: F3)
Sort By button	Select one of the numerous variables by which to sort the email activities in the inbox, such as Activity ID, Case ID, Priority, etc.
Transfer button	Transfer a selected activity. You may be able to transfer the activity to another queue or user, depending on the MRD to which you belong. For details, see “Transferring Emails” on page 49.
More Options button	Perform other functions like: <ul style="list-style-type: none"> ▶ Refresh: Refresh the inbox. ▶ Pin/Unpin: Pin or unpin activities. ▶ Notes: Open the Notes window to manage internal notes that are attached to activities, cases and customers.

Chat Inbox

The inbox toolbar includes the following buttons.

Use	To
Transfer button	Transfer a selected activity. You may be able to transfer the activity to another queue or user, depending on the MRD to which you belong. For details, see “Transferring Chats” on page 63.
Notes button	Only visible in Chat Inbox Open the Notes window to manage internal notes that are attached to activities, cases and customers.

Reply Area

The Agent Console has a comprehensive set of tools to help you easily respond to customer queries. This area changes based on the type of activity on which you are working.

The Reply area includes the following toolbar buttons.

Use	For these Activity Types	To
Reply Type button	Email	Select the type of reply to be sent. Reply types are Reply , Reply to all , Forward , and Redirect .
Send and Complete button	Email	Send the reply and complete the activity.
Send button	Email	Send the reply.
Complete button	Chat	Complete the Chat activity
Link Customer button	Chat	Links chat activity of an anonymous customer to a customer already in the system. This button is only available if the customer accessed a chat entry point that allows for visitors to create chat activities anonymously.
Solve button	All	This button is currently disabled.
More Options button	All	Perform less frequently performed functions like: <ul style="list-style-type: none"> ▶ Notes: Add a note to an activity, case or customer. (Email only) ▶ Complete: Complete the activity. (Email only) ▶ Save: Save a draft of the email. (Email only) ▶ Attachment: Attach a file to the reply. (Email only) ▶ Transfer: Transfer an activity to another queue or user, based on permissions. (Chat only) ▶ Page Push: Share a web page with customers. This button is enabled only when a Chat activity is selected. (Chat only)

Text Editor Toolbar

The text editor toolbar contains the various buttons agents can use to further enhance their responses to customer inquiries. The following buttons are located directly above the text area in the Reply area. The buttons that are available differ based on what type of activity the agent is answering.






Use	For these Activity Types	To
Spell Check button	All	Run the spelling checker. If block check is configured, then your message is checked for any blocked words, any of which found in your message prompts you to delete them before sending the message to the customer.
Headers button	Email	Inserts a pre-written header into the text area.
Greetings button	Email	Inserts a pre-written greeting into the text area.
Signatures button	Email	Insert a pre-written signature into the text area.
Footers button	Email	Insert a pre-written footer into the text area.
Undo button	Email	Undo the previous action.
Redo button	Email	Redo the previous action.
Cut button	All	Cut the selection from the text area.
Copy button	All	Copy the selection from the text area.
Paste button	All	Paste the selection into the text area.
Insert Macro button	All	Insert a macro into the text area.
Expand Macro button	All	Expand the macros currently in the text area.
Paragraph Styles button	Email	Change the paragraph styles of your text (Header, Normal, Address, etc)
Font button	Email	Change the font of the selected text.
Size button	Email	Change the size of the selected text.
Bold button	All	Embolden the select text.
Italics button	All	Add emphasis to the selected text.
Underline button	All	Underline the selected text.
Font Color button	Email	Change the font color of the selected text.
Highlight button	Email	Change the color around the selected text.
Align Left button	Email	Align the selected paragraph to the left.
Center button	Email	Align the selected paragraph to the center.
Align Right button	Email	Align the selected paragraph to the right.
Numbering button	Email	Add a numbered list to the text area.
Bullets button	Email	Add a bulleted list to the text area.
Decrease Indent button	Email	Decrease the indent of the selected text.

Use	For these Activity Types	To
Increase Indent button	Email	Increase the indent of the selected text.
Insert Hyperlink (or Link) button	All	Insert a URL link into the text area.
Insert Table button	Email	Insert a table into the text area. You may choose the number of rows & columns, as well as the width and layout of the table.
Insert Picture button	Email	Insert an image into the text area.
Quick Responses button	Chat	If your administrator has configured quick responses for the common messages used in chat, then you can use them. From the list of quick responses, select the one you want to use. The text of the quick response appears in the Text box.
Text Color button	Chat	Same function as the Font Color button: Change the font color of the selected text.
Smiley button	Chat	Insert a smiley into your message to add flair and personality to your response.

Information Bar

The Information bar provides details about the activity selected in the inbox. From this bar, you can view and edit details about customers, audit activities, view customer and case history, and so on.

The Information bar consists of the following buttons.

Use	To
 Reply button	View the Reply area to work on your response for the selected chat or email activity.
 Case button	Get information about the case to which the selected activity belongs.
 Activity button	View the content of the selected activity. Attachments and headers are also displayed. Also view the field properties of the activity such as the activity ID, the case ID, the priority of the activity, and the date by which the activity should be completed. Generate an audit report to know about the actions performed on the selected activity. Associate classifications such as categories and resolution codes with the selected activity
 Customer button	Get details about the customer associated with the selected activity. Get information about all the activities and cases associated with the customer.
 Links button	Access external applications and databases. Information gathered from these resources can be added to activity replies.

From the tools in the Information bar, you can view details of the following business objects:

- ▶ Activity: body, details, classifications, notes, and audit information
- ▶ Case: details, related cases, classifications, notes

- ▶ Customer: details and history

You can also do the following:

- ▶ Change priority of activities
- ▶ Change severity of cases
- ▶ Change due date of activities and cases
- ▶ Create new cases and change cases of activities
- ▶ Close cases
- ▶ Access external applications and databases
- ▶ Change contact details of customer
- ▶ Change the customer associated with an activity
- ▶ Delete customers
- ▶ Change customer details

The screenshot shows a 'Case Details' form with the following fields and values:

Case ID	1017
Case Status	Open
Original Source	Email
Owner	priyanka1 pri
Severity	Medium
Due On	[Calendar icon]
Due At	[Dropdown]
Description	[Text input]
Description Of Solution	[Text input]

Buttons: Save

Related Cases: No related cases

Classifications: No classifications

Notes: [Text input]

Use the Information bar to view information about the items in your inbox



Getting Started

- ▶ [Getting Work](#)
- ▶ [Doing My Work](#)
- ▶ [Finding Information](#)
- ▶ [Personalizing the System](#)

This chapter provides an overview of working in the Agent Console, and outlines the various settings and options that can be configured to improve your productivity.

Getting Work

As an agent, there are different ways in which work may be assigned to you. This section outlines the various ways in which the work you need to perform is routed to you in the form of activities. Depending on the type of activities you handle, you may experience one or more of the routing methods outlined here.

When a new activity is assigned to you, a message is shown to notify you that a new activity is assigned to you.

Routing

Routing Emails

Emails are retrieved from the mail server and placed into the database. Workflows act on them, creating an activity for each email, and applying the business rules configured by a system administrator. Workflows can then route the email activity directly to a queue.

While in a queue, emails can then be automatically assigned to available agents. They can also be picked or pulled manually by agents. For more information, see [“Picking and Pulling Emails” on page 35](#).

Routing Chats

Chats are initiated from entry points and are routed directly to the queue associated with that entry point. From queues, activities are routed to agents marked as available.

Setting Pull Options

You can specify the queues from which you want to pull activities, which activities to pull, and how many activities to pull at a time. Agents are able to see and select any queues that were imported from the same MRD to which their skill group belongs. Pull options are set from the Options window which is launched using the **Option** button in the console sidebar.

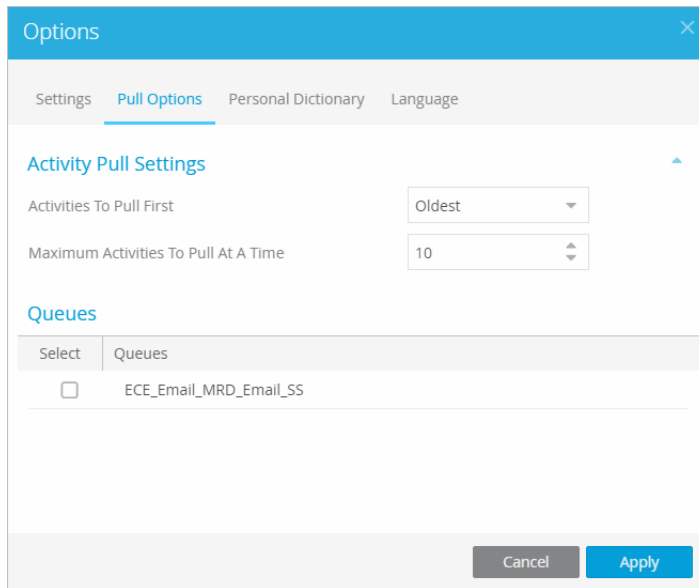


Important: You can change your options for pulling activities only if your administrator has configured you to do so.

To set your pull options:

1. In the console sidebar, click the **Options** button.
2. In the Options window, go to the Pull Options tab and provide the following details.
 - **Activity to pull first:** From the dropdown list select the type of activities to pull. The options available are:

- **Due soonest:** Activities that are not late, but are due the soonest.
 - **Highest priority:** Activities that are marked with the highest priority.
 - **Most overdue:** Activities that are late and are already overdue.
 - **Newest:** Activities that have the most recent creation date and time.
 - **Oldest:** Activities that have the oldest creation date and time.
- **Maximum activities to pull:** Specify the number of activities you want to pull each time you click the **Pull** button. This value cannot be above the agent’s concurrent task limit.
 - From the list of queues, select the queues from which you want activities to be pulled when you click the **Pull** button in the inbox toolbar.



Set options for pulling activities

3. Click the **OK** button.

Managing Availability

In the ECE Agent Console, there are two activity types you are expected to service.

- ▶ Mail
- ▶ Chat

In the Finesse desktop, you can make yourself available for Email and Chat independently. You may still pick, pull, and be transferred email activities while marked unavailable for emails; for more information, see [“Picking and Pulling Emails” on page 35](#). However, chats are automatically assigned to you by the system. The system cannot assign chat activities to you, if you are not marked available. To receive chat activities from your chat queue, you must make yourself available.



Important: You must make yourself available for chat every time you log in to the Agent Console before you can begin receiving incoming chat activities.

If you do not want new chats assigned to you, such as when you are at the end of your shift, you must make yourself unavailable before completing the last chat activity assigned to you. This ensures that new chat assignments waiting in the queue are not assigned to you. Depending on how your system is configured, you may be required to provide a “Not Ready” reason code as to why you are no longer available. The reason codes available are configured by your administrator and may include the following:

- ▶ Break
- ▶ Lunch
- ▶ Training / Coaching
- ▶ One on One
- ▶ Meeting / Huddle
- ▶ Personal
- ▶ Reading
- ▶ End of Shift

To change your availability status:

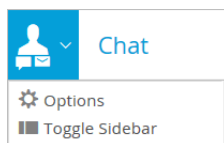
1. In the Finesse desktop toolbar, click the availability dropdown.



Click the Chat and Email availability dropdown

2. In the menu that appears, select one of the following options:
 - **All:** Select **Ready** to mark yourself available for Chat and Mail channels. Select **Not Ready** to mark yourself unavailable for Chat and Mail channels.
 - **Chat:** Select **Ready** to mark yourself available for Chat. Select one of the Not Ready reason codes specific to the Chat channel to mark yourself unavailable.
 - **Email:** Select **Ready** to mark yourself available for Mail. Select one of the Not Ready reason codes specific to the Mail channel to mark yourself unavailable.


Your availability status for the channels is shown by the color of the icons in the Finesse toolbar and in the User menu icon in the ECE Agent Console toolbar.



Your availability is shown in the console toolbar

Notifications

With ECE, Finesse popovers are supported. While you are marked available for activities, notifications appear whenever a new activity is assigned to you. The ECE gadget does not need to be the active application for this to occur. You can be in another Finesse gadget or working outside of Finesse entirely. Selecting the notification brings you directly to the incoming activity in your ECE inbox.

While working in ECE, when a new chat activity is assigned to you, a red dot indicator  is shown on the Chat Inbox button and a notification is displayed in the bottom right corner of the application. This notification is displayed again if two or more minutes have passed and you have not responded to the chat request. If you are not viewing the chat session in the Reply area when the customer sends a new message, a notification is displayed in the bottom right corner of the application.

To configure similar notifications for emails, Finesse workflows are supported.

Doing My Work

Cases and Activities

A majority of the work you do in the Agent Console involves working with activities and cases.

- ▶ Cases are discussed in the chapter [“Cases” on page 78](#).
- ▶ Common aspects of working with activities are discussed in [“Activities” on page 65](#).
- ▶ Details about working with specific types of activities such as email and chat are discussed in the chapter dedicated to that activity type. See [“Emails” on page 34](#) and [“Chats” on page 52](#).

Resources

The application provides easy access to several resources that help you to quickly respond to emails, complete chats, and work on other types of activities. The Agent Console is designed so that most of these resources are

available from the buttons in the Information bar, allowing you to easily access these resources while working in the Reply area.

Case Details Case History

Case Details

Case ID 1017

Case Status Open

Original Source Email

Owner priyanka1 pri

Severity Medium

Due On

Due At

Description

Description Of Solution

Save

Related Cases +

No related cases

Classifications

No classifications

Notes +

Information bar with Case selected

Finding Information

The easiest way to locate objects like activities, cases, and customers is to search for them. Objects that are listed in the Inbox can be located quickly using the **Search** feature in the console sidebar.

You can locate completed activities, as well as open and closed cases assigned to you by clicking viewing the Folder feature in the console sidebar. This is a quick and easy method of reviewing your work, or seeing what else needs to be done to close a case.

Personalizing the System

About Options and Settings

Most settings are configured by administrators for the business partition or for each department. The administrator may allow users to configure certain settings as individual options. In the Options window, you can modify settings and create personal dictionary attributes.



Important: Changes made to options take effect on the next login. If you want the changed options to take effect immediately, you must log out of the system and log in again.

Configuring Settings

If you have been assigned the required permissions, you can change the following settings for your inbox.

Activity

1. **Chat - Inbox Sort Column:** Use this setting to define the field (column name) by which the list in the Chat Inbox should be sorted. The options available are – Key (default value) which refers to the shortcut key, Activity ID, Case ID, When Created, Customer name, Subject, Activity sub status, and Queue name.



Important: If you specify a column name that is not part of your inbox list, or if there is a tie between two activities with the same value for the sorting column, the inbox is then sorted by the shortcut key.

2. **Chat - Inbox Sort Order:** Use this setting to define the sort order of the list in the Chat Inbox. The options available are – Ascending and Descending (default value). This setting does not affect the sorting in My Searches and My Monitor folders.
3. **Inbox Sort Column:** Use this setting to define the field (column name) by which the list in the Activities and Cases folders should be sorted by default. The options available are – Activity ID (default value), Activity Priority, Case ID, Contact point, Department name, Subject, When created, Activity type, and Activity sub status. This setting does not affect the sorting in the My Searches folder.
4. **Inbox Sort Order:** Use this setting to define the sort order of the list in the Activities and Cases folders in your inbox. The options available are – Ascending and Descending (default value). This setting does not affect the sorting in the My Searches folder.
5. **Number Of Activities Per Page:** The number of activities that can be displayed in the inbox at a time is based on a pagination model. Each page displays a certain number of records. With this setting, you can decide the number of activities to be displayed on one page. The default number of activities displayed on a page is 4. Note that two other settings, the Inbox sort column and Inbox sort order also influence the activities that are displayed on a page.

Activity Pushback

1. **Activity Type For Autopushback:** You can define which activities should be pushed back from your inbox when you log out. The options available are:
 - **None:** No activities are pushed back to queues.
 - **New activities only:** Only activities with the sub-status **New** are pushed back to queues (default value).
 - **Both new and incomplete activities:** All activities in the inbox are pushed back to queues.
2. **Autopushback Time (Minutes After Logout):** You can define a time period after which activities should be pushed back from your inbox to queues. This time period begins when you log out of the system. Activities will remain in your inbox for this period of time after you log out of the system. The value for this setting is in minutes. The default value is 30.

Common

- ▶ **Send Agent An Email When Activity Is Assigned:** Use this setting to define when email notifications of new activities should be sent to you. The options available are:
 - **Always:** Email notifications are sent every time a new activity is assigned, irrespective of whether you are logged in to the application or not.
 - **Never:** No email notification about new activities are sent (default value).
 - **When Logged In:** Email notifications are sent to your email address when you are logged into the application.
 - **When Not Logged In:** Email notifications are sent to your email address when you are not logged into the application.

General

1. **Chat - Enable Sound Alert:** Use this setting to define if you want the system to play a sound when a chat is assigned, and every time a chat message is received. To minimize distraction, the alert sounds only when the focus is not in the chat inbox.
2. **Email - Enable Sound Alert:** Use this setting to define if you want the system to play a sound when an email is assigned to you. To minimize distraction, the alert sounds only when the focus is not in the main inbox.

Monitoring

- ▶ **Refresh Interval (Seconds):** The monitor windows in the Supervision Console have to be refreshed periodically to update them with real time data from the monitor tables. Use this setting to define how often the monitoring windows should be refreshed automatically. This setting takes values in seconds. The default value is 30.

Spell Checker

1. **Auto Blockcheck:** With this setting you can choose to let the spelling checker automatically check for blocked words. Blocked words are configured in the Administrator Console in the Dictionaries node. They can also be defined in the Personal Dictionary options of a user. If this setting is enabled, emails that contain

blocked words are not sent until the blocked words have been deleted or modified. Since the Auto blockcheck works through the Auto spell check setting, enabling the Auto block check means that the spelling checker is automatically invoked before an email is sent out.

2. **Auto Spellcheck:** Enable this setting to automatically invoke the spelling checker before an email is sent out of the application.
3. **Chat - Auto Blockcheck:** With this setting you can choose to let the spelling checker automatically check for blocked words. Blocked words are configured in the Administrator Console in the Dictionaries node. If this setting is enabled, chat messages that contain blocked words are not sent until the blocked words have been deleted or modified. Since the Auto blockcheck works through the Auto spell check setting, enabling the Auto block check means that the spelling checker is automatically invoked before a chat message is sent.
4. **Chat - Auto Spellcheck:** Enable this setting to automatically invoke the spelling checker before a chat message is sent to the customer. This setting is not used for emails.
5. **Ignore Web Addresses And File Names:** This setting helps you to enable the spelling checker to ignore internet addresses and file names. The options available are:
 - Yes: The words are ignored.
 - No: The words are not ignored and are displayed in the spelling checker for correction (default value).
6. **Ignore Words That Contain Numbers:** This setting allows you to let the spelling checker ignore words with numbers. The options available are:
 - Yes: The words are ignored.
 - No: The words are not ignored and are displayed in the spelling checker with options for correction (default value).
7. **Ignore Words With Only Upper Case Letters:** With this setting, you can choose to let the spelling checker ignore words in all uppercase letters. The options available are:
 - Yes: The words are ignored.
 - No: The words are not ignored and are displayed in the spelling checker with options for correction (default value).
8. **Ignore Words With Only Numbers Or Special Characters:** This setting allows you to let the spelling checker ignore words that have mixed digits. For instance, name123@yahoo.com. The options available are:
 - Yes: The words are ignored.
 - No: The words are not ignored and are displayed in the spelling checker with options for correction (default value).
9. **Ignore Words With A Mixture Of Upper And Lower Case Letters:** With this setting, you can choose to let the spelling checker ignore words with unusual mixture of upper and lower case letters. For instance, myFirstWord. The options available are:
 - Yes: The words are ignored.
 - No: The words are not ignored and are displayed in the spelling checker with options for correction (default value).
10. **Include Original Message Text During Spell Check:** Use this setting to decide if the content of the original email message should be checked when the spelling checker is run.

11. **Preferred Dictionary Of The User:** Use this setting to choose the dictionary used by the spelling checker. The options available are - English (US) Dictionary, English (UK) Dictionary, German Dictionary, Spanish Dictionary, French Dictionary, Portuguese Dictionary, Brazilian Portuguese Dictionary, Dutch Dictionary, Italian Dictionary, Norwegian (Bokmaal) Dictionary, Finnish Dictionary, Swedish Dictionary, Danish Dictionary.



Important: The application does not have dictionaries for the following languages: Chinese (Simplified), Chinese (Traditional), Czech, Greek, Japanese, Korean, Norwegian (Nynorsk), Portuguese (Brazilian), and Turkish.

12. **Split Contracted Words:** The spelling checker considers correct contracted words as misspelled while using the French and Italian dictionaries. Configure the value of this setting to **Yes** to ensure that contracted words in these languages are not misidentified by the spelling checker. This setting affects only French and Italian. Options available are: **Yes** and **No**.

User

- ▶ **Include Message Header In Reply:** An email contains header information that details the sender's email address, subject of the email, time at which the email was sent, machine name, protocol type, client name etc. Use this setting to define the type of header information that should be included in the reply. The options available are:
 - **None:** No header information is displayed in the Reply area and hence included in the reply.
 - **Basic:** Only basic header information is displayed in the Reply area and hence included in the reply. (default value).
 - **Complete:** The complete header information is displayed in the Reply area.

To change settings:

1. In the console sidebar, click the **Options** button.

2. In the Options window, go to the Settings tab, and change the desired settings.

The screenshot shows the 'Options' dialog box with the 'Settings' tab selected. The 'Activity' section contains the following settings:

Setting	Value
Chat - Inbox Sort Column	Key
Chat - Inbox Sort Order	Descending
Inbox Sort Column	Activity id
Inbox Sort Order	Ascending
Number Of Activities Per Page	4

The 'Activity pushback' section contains the following setting:

Setting	Value
Activity Type For Autopushback	New activities only

Buttons: Cancel, Apply

Configure settings

3. After making your changes, click the **Apply** button.

Updating the Personal Dictionary

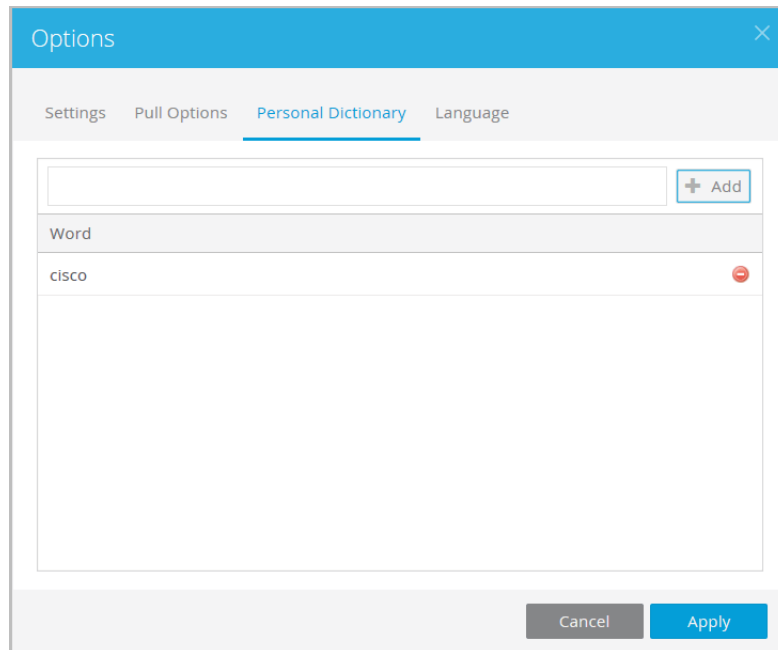
To prevent the spelling checker from highlighting words that are specific to your organization, but not part of a standard dictionary, you can update the personal dictionary.

Adding Words to Personal Dictionary

To add words to your personal dictionary:

1. In the console sidebar, click the **Options** button.
2. In the Options window, click the Personal Dictionary tab.

3. On the Personal Dictionary tab, click in the field below the Word column heading, type the word you want to add to your personal dictionary and press ENTER or click the **Add** button.



Add words to the personal dictionary

4. When you have added all the desired words, click the **Apply** button.

Deleting Words From Personal Dictionary

To delete words from your personal dictionary:

1. In the console sidebar, click the **Options** button.
2. In the Options window, on the Personal Dictionary tab, select the word you want to delete and click the **Delete** button.

Setting the KB Language

In deployments configured for more than one language, you can set the KB language for a session.

To set the language:

1. In the console sidebar, click the **Options** button.
2. In the Options window, go to the Language tab.
3. Select the language.
4. Click **Apply**. The language is set for the user session, that is, until you log out of the system.





Emails

- ▶ [Picking and Pulling Emails](#)
- ▶ [Viewing Emails](#)
- ▶ [Multitasking with Phone Activities](#)
- ▶ [Reply Types](#)
- ▶ [Email Address and Subject](#)
- ▶ [Composing Replies](#)
- ▶ [Email Reply Tools](#)
- ▶ [Pinning Email Activities](#)
- ▶ [Saving Drafts](#)
- ▶ [Sending Replies](#)
- ▶ [Composing an Outbound Email](#)
- ▶ [Resubmitting an Activity](#)
- ▶ [Completing Email Activities](#)
- ▶ [Transferring Emails](#)

Picking and Pulling Emails

There are different ways in which you can actively assign to your inbox:

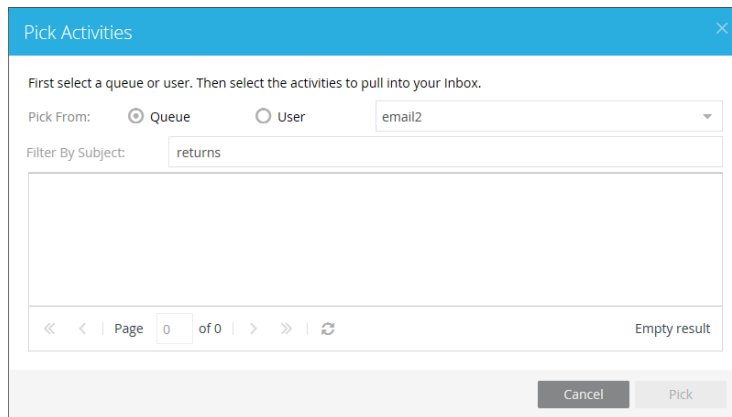
- ▶ You can pick specific emails from users and queues using the **Pick**  button.
- ▶ You can configure your pull options and pull emails to the inbox using the **Pull**  button.

Picking Emails From Users or Queues

To pick selected emails from users or queues:

1. In the Main Inbox toolbar, click the **Pick** button.
2. In the Pick Activities window, Select the queue or user from where you want to get activities.
3. From the list of activities, select the activities you want to get and click the **Pick** button. You can reduce the number of activities that appear in the **Pick Activities** window by typing keywords in the **Filter By Subject** field. Use the page buttons at the bottom of the results to cycle through the pages of search results if necessary.

Once you have selected the activities and clicked the **Pick** button, the activities are assigned to you, and displayed in the inbox.



Pick activities from users and queues

Pulling Emails Using Pull Options

- ▶ You can set your pull options for queues, and every time you click the **Pull** button, activities are assigned to you based on these options. To set your pull options, see [“Setting Pull Options” on page 23](#).

To pull emails using options:

1. In the Main Inbox toolbar click the **Pull** button.
2. Activities are pulled and assigned to you according to the pull options set in the Options window. If there are no activities that meet the pull criteria, you are notified that no activities were pulled.

Important Things to Note About Picking and Pulling:

- ▶ Agents can pick emails from other agents that belong to the same set of skill groups.
- ▶ Only agents who are part of a skill group that is associated with the queue can pick or pull from that queue.
- ▶ Only agents who match the attributes of a Precision Queue (PQ) that is associated with the ECE queue can pick or pull from that queue.
- ▶ Based on the **Maximum Assignment Beyond Concurrent Task Limit** setting, agents who have reached their concurrent task limit can pick additional activities. The maximum number of activities is defined as part of the setting.



Important: If the application is integrated with a version prior to Unified CCE 12.0(1), agents cannot pick activities beyond the concurrent task limit.

- ▶ When working on a non-interruptible chat or voice call:
 - Agents can pick or pull interruptible emails from queues and other agents.
 - Agents cannot pick or pull non-interruptible emails from queues or other agents.



Important: If the application is integrated with a version prior to Unified CCE 12.0(1), agents cannot pick activities while working on non-interruptible chats or voice calls.

- ▶ Agents with the Administrator Role can pick from the Default exception queue.



Important: Emails with exception keywords that are routed to the Default exception queue should not be transferred to other queues. These emails cannot be picked or pulled upon being transferred to other queues.

Viewing Emails


Email activities are displayed in the Email Inbox which can be accessed from the Console sidebar. These activities could be assigned to you automatically based on your availability ([page 24](#)) or from picking or pulling the emails ([page 35](#)). Once activities are assigned to your inbox, you can select the activity to view it and work on it in the reply area.

You can select and view more than one email at a time. When more than one email activity is selected in the inbox, the following bulk actions are available:


- ▶ **Transfer:** Click the **Transfer** button in the reply area to transfer the selected activities to another user or queue. ([page 49](#))
- ▶ **Reply:** Click the **Reply** button in the reply area to compose a reply for all the selected activities. ([page 39](#))
- ▶ **Complete:** Click the **Complete** button in the reply area to complete the selected activities. ([page 49](#))
- ▶ **Pin:** Click the **Pin** option in the **More Options** menu of the inbox to pin the selected activities to your inbox. ([page 46](#))

Depending on the way your system is configured, you may be able to view the content of the incoming email in the text box in the Reply area, or in the Activity Body section under the Activity page. Some of the information a customer may share with you (birth dates, credit card numbers, etc.) can be masked to maintain confidentiality.

To view an email:

1. In Console sidebar, click the **Email inbox**  button.
2. In the Email Inbox, select the activity by clicking on it.

The Reply area refreshes to display the contents of the email activity. You may need to click the **Activity** button in the Info bar to view the content.

3. If there are any attachments, the attachments are displayed above the body of the activity. You may need to expand area by clicking the **Expand**  icon next to the To address to see them.

Multitasking with Phone Activities

Since phone is a real-time activity, when on a phone call, you have limited access to other work during that time. This is controlled by administrators using the department level setting “Service email and phone activities at the same time”.

- ▶ When the setting is enabled: During a phone call, you can continue to respond to emails that are already assigned to you. The **Send** and **Send and Complete** buttons are enabled for emails. However, no new emails get assigned to you while you are on a phone call. If you are associated with an outbound MRD, you can create outbound emails during a phone call.
- ▶ When this setting is disabled: During a phone call, you *cannot* respond to email activities that are already assigned to them. The **Send** and **Send and Complete** buttons are disabled for emails. Also, no new emails get assigned to you while you are on a phone call. You cannot create outbound emails while you are on a phone call.

Reply Types

While working on an email activity, you can change the type of reply to send by clicking the **Reply Type** button in the Reply area and selecting the appropriate option from the menu. By default, the reply type chosen is **Reply**. The available reply types are:

- ▶ **Reply**: Email is sent only *to* the original sender.
- ▶ **Reply to all**: Email is sent to all the addresses in the To, CC, and BCC fields.
- ▶ **Forward**: Email is sent from the alias at which the incoming email was received to all the address entered in the To, CC, and BCC fields.
- ▶ **Redirect**: Email is sent from the original sender of the email to all the addresses entered in the To, CC, and BCC fields. Use this option only if you wish to make the email appear as if it is from the original sender, and not from the system.

Upon selecting a reply type, the To, From, CC, and Subject fields expand to allow you to make the necessary changes.

Email Address and Subject


Editing the From, To, CC, or BCC Fields

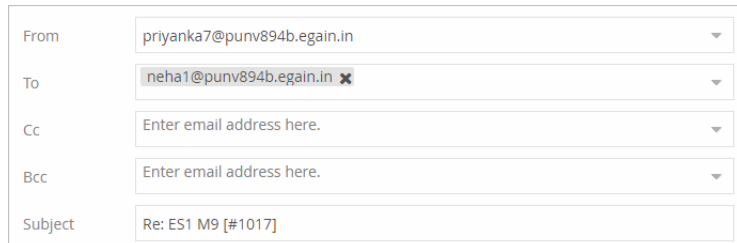
Upon first accessing the email, the To field and the email body are displayed. To edit the From, To, CC, BCC, and Subject fields, you can click the down-arrow button to the right to expand the area.

The From field contains the address displayed in the From field of the email header when the mail is received by the customer. By default, this field shows the address of the email aliases at which this email was received, but you may wish to change this under certain circumstances.

This is also the address that becomes the To address when a customer replies to the email. If you do not want the reply from the customer to come to the address specified in the From field, but want it to go to a different address, you can specify that email address in the **Reply to** field.

To edit the From, To, CC, or BCC fields:

1. Click the **Expand**  icon by the To address.
2. Type or select the address that you want to use as the From address for your reply email to the customer.



The screenshot shows an email composition interface with the following fields:

- From:** priyanka7@punv894b.egain.in
- To:** neha1@punv894b.egain.in (with a small 'x' icon to the right)
- Cc:** Enter email address here.
- Bcc:** Enter email address here.
- Subject:** Re: ES1 M9 [#1017]

Change the From email address

3. Type or select the address that you want to use as the To address to which your email will be sent.
4. Type or select the address that you want to use as the CC address to which your email will be sent.
5. Type or select the address that you want to use as the BCC address to which your email will be sent.

Editing the Subject

The subject field of the email indicates what the email is about. If the activity belongs to a case, it also contains the Case ID to which the activity belongs. When you send an email to the customer the system automatically adds the Case ID to the subject of the email. Make sure to use a subject that is concise and informative.

To edit the subject:

1. Click the **Expand**  icon by the To address.

2. Type the subject in the subject field.

Composing Replies

Replying to an Email

Once you have selected the email, you can begin writing your reply in the reply area. There is no character limit for email replies and you can add and remove content as needed.

To reply to an email:

1. Select an email activity from your Email Inbox.
2. In the Reply area, type the content of the reply in the text box. You can add or enhance content with the tools in the Reply area. For more information, see [“Email Reply Tools” on page 40](#).

Depending on the way your system is configured, you may be able to view, edit, and delete the message of the incoming email here.



Important: Your reply is autosaved every 2 seconds. If you edit the contents of the text box and go to another activity before the autosave, you will lose your changes.

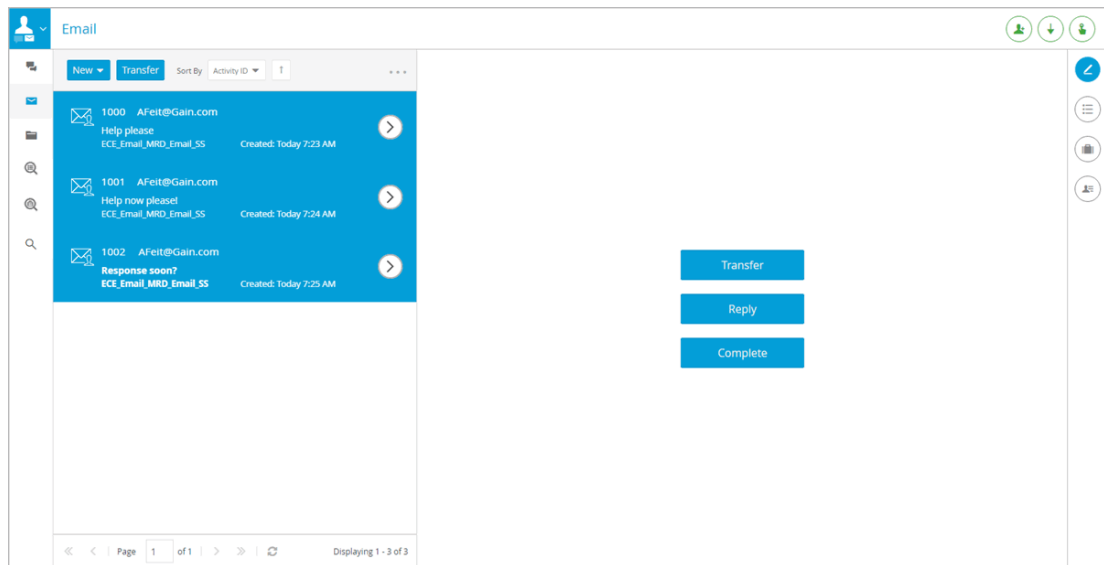
Replying to Multiple Emails

You can select multiple emails in your inbox and service them at the same time.

To reply to multiple emails:

1. Select more than one email in your email inbox.

2. In the Reply area, click the **Reply** button.



The reply area displays options for servicing multiple emails at once

3. The Reply area refreshes. Now you can select a reply type and compose a common reply that will be sent to all the selected email activities. You can add or enhance content with the tools in the Reply area. For more information, see [“Email Reply Tools” on page 40](#).

The email addresses for all the selected activities are added to the **To** field. While replying to multiple emails at once, the email addresses in this field cannot be changed or removed.

Email Reply Tools

There are also a multitude of tools available to further enhance your reply. These tools can help you enhance the presentation of your reply, as well as provide additional resources to the recipient, such as attachments or hyperlinks. You can adjust the content of your replies by:

- ▶ [Altering Content Styles](#)
- ▶ [Adding Articles](#)
- ▶ [Adding Macros](#)
- ▶ [Adding Hyperlinks](#)
- ▶ [Adding Images](#)
- ▶ [Adding Tables](#)
- ▶ [Adding Attachments](#)
- ▶ [Performing Spell Check](#)

Altering Content Styles

When responding to emails your reply defaults to a format, font, and size. You can adjust this using the style dropdown menus, the alignment buttons, and the format buttons.




You can also change the color of the text or the color of the space behind it to highlight the text.





Resolving Issues the Right Way

Contact Service Plus is a service that provides you with the best and fastest responses to your inquiries. Our response time is guaranteed to be within **24 hours** of your **initial** email.

Adding Articles

Headers, Greetings, Signatures, and Footers are optional features that provide access to special KB articles for use in replies. If the activity belongs to a queue that has any such article associated with it, the text editor toolbar displays the options under the **Articles**  button which can be used to add the content of these articles to a reply.

To add articles replies:

1. In the text box toolbar, click the **Articles** button.
2. Hover your mouse over one of the following options: Header , Greeting , Signature , and Footer . Any articles that have been added to the corresponding knowledge base folders appear.
3. Select the article you wish to add.


The system may also be set up to automatically populate the reply email with the contents of the header, greeting, signature and footer.

Adding Macros


Macros are shortcuts that contain paragraphs, simple sentences, or references to customer or user-specific information, such as names, addresses, and phone numbers.

There are multiple methods of adding macros to your responses. In the Text box toolbar, click the **Add macro** button to add macro. To prevent the macro from expanding right away, type the macro name with only two single-opening accent marks. The macro is expanded only when the message is sent.

To add macros to replies:

1. In the text box toolbar, click the **Insert Macro**  button.
2. In the Add Macro window, navigate to and select a macro category, such as Combination, Formats, Case Data, etc.
3. In the list that appears on the right, select the desired macro.

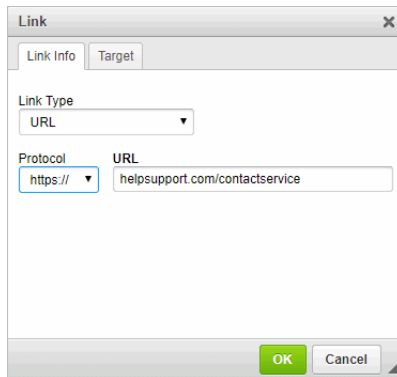
4. Click **OK**.

The macro is added to the response with two opening quotes. The macro automatically expands upon sending the reply. However, if you wish to expand the macro prior to sending the reply, click the **Expand Macro**  button.

Adding Hyperlinks

To add hyperlinks to replies:

1. In the text box toolbar, click the **Insert Hyperlink**  button in the Text box toolbar and in the Explorer User Prompt window, type the hyperlink you want to add.




Type the web address

2. Under the Target tab, select the target behavior for the hyperlink from the dropdown menu. Adjusting this changes the link behavior so that when a user clicks the hyperlink, the link opens in the same window, a new window, as a popup, etc.
3. Under the Upload tab, you can upload an image for the link if you wish to present the hyperlink as an image. Click the **Browse...** button and navigate to the desired image and click the **Send it to the Server** button.
4. Under the Advanced tab, specify additional details for the link such as style, language, etc.
5. Click **OK**.

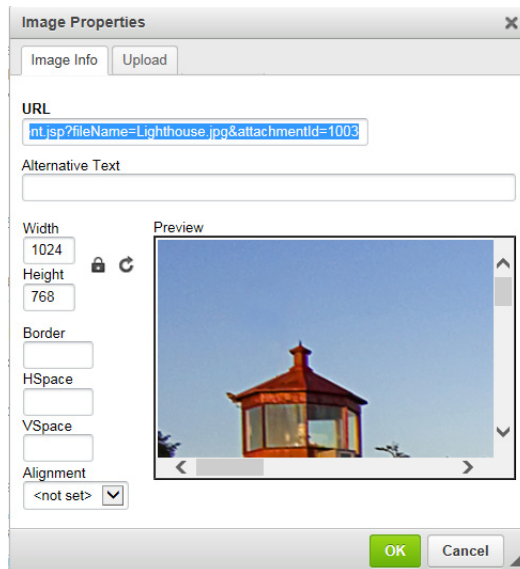
Adding Images

When adding images to your reply, follow the steps provided below. Do not copy and paste the image.

To add an image to a reply:

1. In the text box toolbar, click the **Insert image**  button. In the Insert Image window, there are three tabs:
 - **Image Info:** Provide the basic information for an image, such as the image URL, alternative text, and size dimensions. If using an image URL, the image should be stored at a location that is accessible to an external user. If the image is removed from this external resource or the address is changed, the inserted image will no longer be visible.
 - **Upload:** If the image you want to use is not publicly available via URL, you can upload.

- i. Click the **Browse...** button to locate an image from your computer.
- ii. When you've selected an image, click the **Send it to the Server** button to make the image publicly available.
- iii. In the Image Info tab, you can see the new URL for the image.




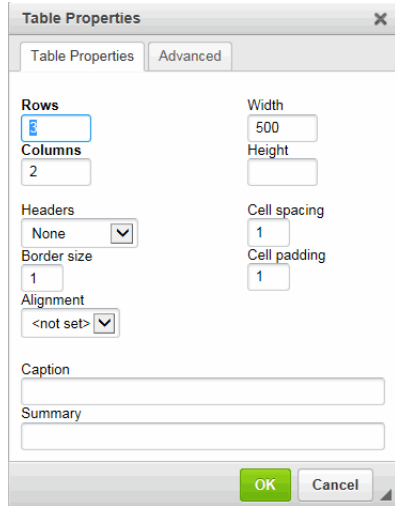
Type the URL of the image

2. Once you have provided the image, a preview appears in the Thumbnail preview section. In the image details section, you can adjust the height and width of the image as well as the vertical and horizontal padding to the image. To add the image to your response, click the **OK** button.

Adding Tables

To add tables:

1. In the text box toolbar, click the **Insert table**  button.




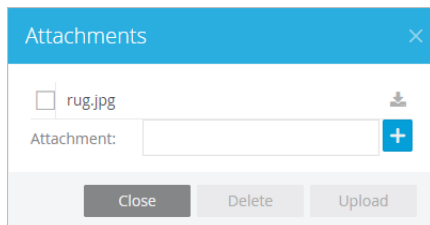
Edit the table properties

2. In the Table Properties window, specify the dimensions, properties, subject, and caption of the table.
3. On the Advanced tab, specify any additional details.

Adding Attachments

To add attachments:

1. Select the email to which you want to attach a file.
2. In the Email Inbox or in the Reply area, click the **More Options** menu.
3. Select the **Attachment** option.
4. Click the **Add**  button.



Add attachments to the reply

5. Browse to the desired file and select it.
6. Click the **Upload** button to attach it to the activity.

Note that the system replaces any special characters, like &*,\$, % and so on, in the file name of attachments with an underscore before it is displayed in the Email Inbox. For example, a file named *info&feedback.doc* is renamed *info_feedback.doc*.

You can attach more than one file at a time to an activity. Click the **Delete** button to remove any selected attachments from the activity.

7. When you are finished attached files to the activity, close the Attachments window.

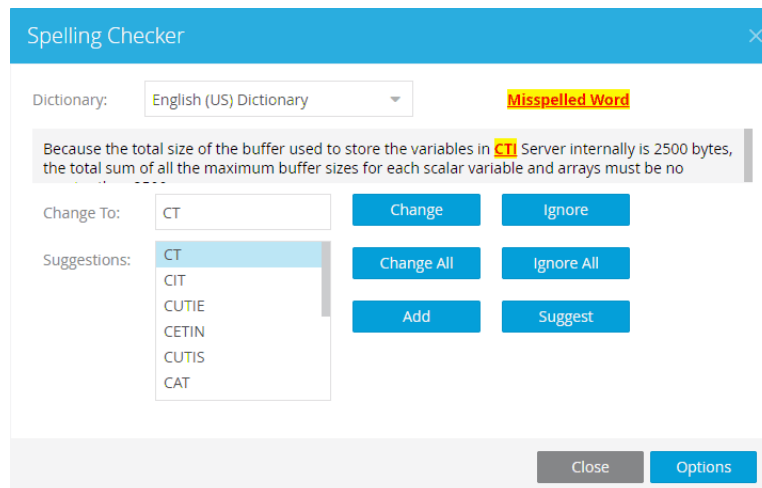
Once you have attached the file, the attachments you have added to the email are added to the area below the email subject line. Click an attachment if you wish to view or download it.

Performing Spell Check

If your administrator has configured auto spell check, the spelling checker runs automatically every time you send a reply.

To run the spelling checker:

1. In the text box toolbar, click the **Spell Check** ^{ABC} button.
2. If errors are found, The Spelling Check window appears. This button is disabled if the article content is in a language that does not have spell-checker support. The Not in dictionary section shows the misspelled words in red and the Suggestions section shows the suggested words for them. You can either ignore the suggestions or you can change the misspelled word to the suggested words. You can also suggest the word to be added to the dictionary by using the Suggest button. You can also add a word to your personal dictionary by clicking the **Add** button.



Add, change, suggest, or ignore checked words

3. Click the **Options** button to adjust your personal dictionary or spell check settings.
4. When spelling check is complete, click the **OK** button.

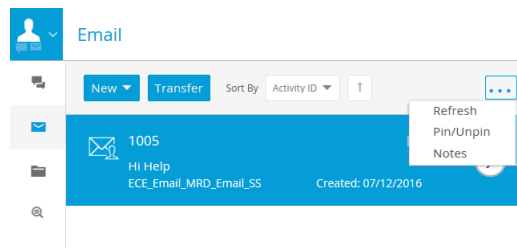
Pinning Email Activities

Email activities can be pinned to your inbox to indicate that you wish to continue to work on a particular activity, and do not want it to be moved to a queue or another user. Pinned activities are not pushed back automatically to queues. You can pin activities only if you have the Pin action assigned to you. A pinned activity can be pulled, but only by users who have the Unpin action assigned to them.

Pinning an Email Activity

To pin an email activity:

1. In the Email Inbox, select the email you want to pin. You can select multiple emails to pin at the same time.
2. From the **More options** dropdown, select **Pin/Unpin**.



Pinning an activity

A **Pin**  icon appears in the inbox list indicating that the activity is pinned.

If you cannot see the **Pin** icon, contact your system administrator.

Unpinning an Activity

To unpin an activity:

1. Select the pinned activity from the inbox list.
2. In the Main Inbox toolbar, from the **More** button, select **Pin/Unpin**. The activity is unpinned.

Saving Drafts

You may wish to save a draft of your message in the Reply area without sending the reply or completing the activity. The application allows you to save a draft of your reply.

Always save a draft under the following circumstances:

- ▶ After making changes to a reply
- ▶ After attaching a file
- ▶ Before transferring an activity

Under the following circumstances, you do not need to save a draft:

- ▶ After adding a note to an activity
- ▶ Just before clicking the **Send**, **Send and Complete**, or **Complete** buttons

To save a draft:

- ▶ In the Reply area toolbar, click the **Save** button.

Sending Replies

The **Send** button is used to send your reply. When you send a reply to an incoming email and do not complete the activity, the original email stays in your Email Inbox and a new email activity is created and is sent to the customer. When you compose an outbound email, and send the email without completing the activity, the activity is removed from your Email Inbox while the reply is being sent to the customer. Once the email is sent to the dispatcher for processing, the original outbound activity is displayed in the Email Inbox again.

To send an email:

- ▶ In the Reply area toolbar, click the **Send** button.

The reply is sent, but the activity remains open until it is completed. Sent replies for activities that have and have not been completed can be viewed in the **Sent Activities** folder.

Sending Replies and Completing Activities

To send and complete an activity:

- ▶ In the Reply toolbar, click the **Send and Complete** button. It sends the reply and sets the state of the activity to **Complete**.

Composing an Outbound Email

To create a new outbound email:

1. In the Inbox toolbar, point to the **New** button and select the activity shortcut you want to use to create the outbound email activity. You can choose from:
 - **Outbound Email for Current Case** (Shortcut key: F4)
 - **Outbound Email for New Case** (Shortcut key: F3)

If you select **Outbound Email for Current Case**, the Reply area refreshes and you can begin composing your reply. Composing the content of an outgoing email is similar to replying to an incoming email. For details, see [“Composing Replies” on page 39](#).

If you select **Outbound Email for New Case**, a search window appears.

2. In the search window, provide the email address of the customer to whom you wish to send the outbound email.



Search for customer

3. Click the **Search** button. If no match is found, the system is configured by default to create a new customer automatically and display the email activity in the Email Inbox.
4. The Reply area refreshes and you can begin composing your reply. Composing the content of an outgoing email is similar to replying to an incoming email. For details, see [“Composing Replies” on page 39](#).

Resending an Email

In the event when an email is sent to the customer and the customer contacts back saying he did not get an email, an email can be resent the customer without having to recreate a response.



Important: Only composed outbound emails can be resent. Responses to incoming emails cannot be resent.

To resend an email:

1. Use the console Search, or browse the **Sent Activities** folder to find the sent response.
2. In the Reply area, click the **Resend** button. If the case associated with the activity has been closed, the case is then reopened, the email is sent, and the case is closed again.

Resubmitting an Activity

If an activity was rejected by a supervisor, as part of the Outbound Email Review workflow, you may need to modify your reply and resubmit it.

To resubmit an activity:

- ▶ In the Reply area toolbar, click the **Resubmit** button. It sends the reply back to the supervisor for review.

If the supervisor accepts the reply, it is sent to the customer. If your original action was a **Send and Complete**, the activity is closed. If your original action was **Send**, the reply is sent, but the activity is not closed.

Completing Email Activities

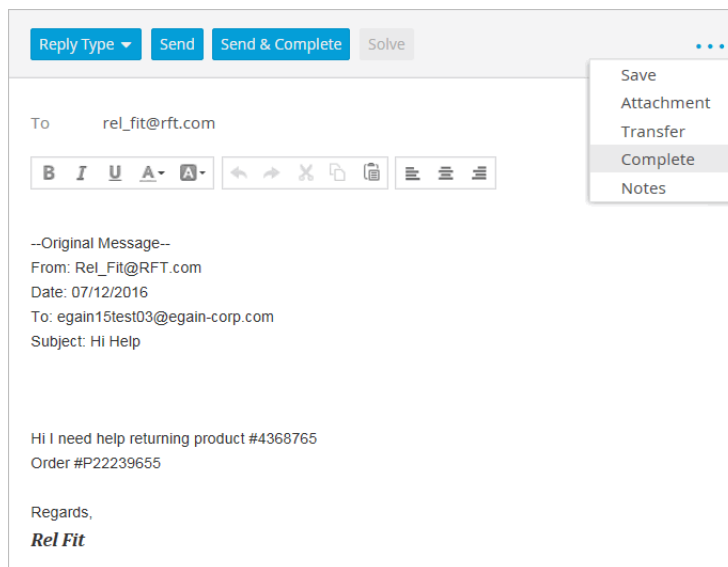
You can use this option if you have finished working on the email assigned to you and no reply needs to be sent to the customer. Multiple emails can be selected and completed at the same time.

When an activity is completed, it is removed from your inbox and sent to the Completed Activities folder. Once it is completed, a majority of the details pertaining to the activity can no longer be edited. If there are no other open activities in the same case, the case is closed. If, however, there are still other activities belonging to the same case that are still open, the case remains open, while this activity is marked completed.

Completed activities, open cases, and closed cases can all be viewed in the Folders list via the console sidebar. From here, you can review your work or see what else needs to be done to close the associated case.

To complete an activity:

- ▶ In the Reply area, in the More Options menu, click the **Complete** button.



Complete the email activity

Transferring Emails

Emails can be transferred to users or queues depending on the MRD to which you belong. Before transferring an activity, you can check the number of emails in a queue and add notes to the activity in the Transfer Activities window.



Important: ECE only supports interruptible email MRDs.

To transfer an activity:

1. In the inbox, select the activity you want to transfer.

2. In the Reply area or Inbox toolbar, click the **Transfer** button.
3. In the Transfer Activities window, set the following:
 - In the **Transfer to** field, from the dropdown list, select **user** or **queue**.
 - In the **Filter Text** field, enter text to reduce the number of results.

From the list of available users or queues, select the one to which you want to transfer the activity. In the Transfer Activities window, the queue from which the activity was assigned to you is tagged with the text *Original* and is displayed at the top of the list.

- Add any necessary notes to the activity in the **Add Notes** field.
- Click the **Allow these activities to be reassigned to me by the system** box if you wish to allow the activity to be reassigned to you in the event that it is not assigned to another available user.
- Click the **Transfer pinned activities** box to allow the application to transfer the activity if the activity is pinned in your inbox.
- If applicable, click the Change Priority dropdown to set the priority of the activity.

Transfer an email

4. Click the **Transfer** button to transfer the activity.

Important Things to Note About Transferring Emails:

- ▶ Multiple emails can be selected and transferred to another user or queue at the same time, so long as the emails are new and have no draft responses. If an email has any draft responses, or is not a new incoming email, it must be transferred individually.
- ▶ Outbound emails created by agents can only be transferred to users and not to queues.
- ▶ Disabled users are not listed in the list of users to whom you can transfer activities.
- ▶ You can transfer activities only if you have the Transfer action. For more information about actions, see the *Enterprise Chat and Email Administrator's Guide to the Administration Console*.

Transferring to Queues:

- ▶ An email can be transferred to any queue that belong to the same media class. From there, the activity is routed based on the queue-to-script mapping.

Transferring to Agents:

- ▶ Agents can transfer emails to other agents that belong to the same set of skill groups.
- ▶ Based on the **Maximum Task Limit** setting, agents can transfer additional activities to agents who have reached their concurrent task limit. The maximum number of activities is defined as part of the setting.
- ▶ Emails cannot be transferred to departments directly. If the **Allow Transfer of Activities to Integrated Queues in Other Departments** setting is enabled, agents can transfer activities to queues of other departments.
- ▶ If the **Allow email transfer to agents who are not available** setting is enabled, agents can transfer activities to other agents who are not available to work on new activities. To be able to transfer an email to an agent, the agent must be logged in to the application, should not have met the concurrent task limit, and should not be working on a non-interruptible activity. If these requirements are not met, the agent is not displayed in the Transfer Activities window.
- ▶ If the **Allow email transfer to agents who are not logged in** setting is enabled, agents can transfer activities to other integrated agents who are not logged in to the application. To be able to transfer an email to an agent, the agent should not have met the concurrent task limit. If this requirement is not met, the agent is not displayed in the Transfer Activities window.
- ▶ An agent can transfer interruptible email activities to another agent. An agent cannot transfer non-interruptible email activities to another agent. The concurrent task limit of the agent is considered in these instances.

4 Chats

- ▶ [About Chats](#)
- ▶ [Chat Inbox](#)
- ▶ [Multitasking With Chat Activities](#)
- ▶ [Servicing Chat Activities](#)
- ▶ [Chat Reply Tools](#)
- ▶ [Completing Chats](#)
- ▶ [Viewing Chat Transcripts](#)
- ▶ [Linking Customers](#)
- ▶ [Transferring Chats](#)

About Chats

Chat allows you to service online customer requests in real time. A customer clicks on a link or button on a web page to initiate a chat session. Clicking this button or link takes the customer to an entry point (a page) from which the customer can chat with an agent. An agent responds to a customer’s query from the Agent Console.

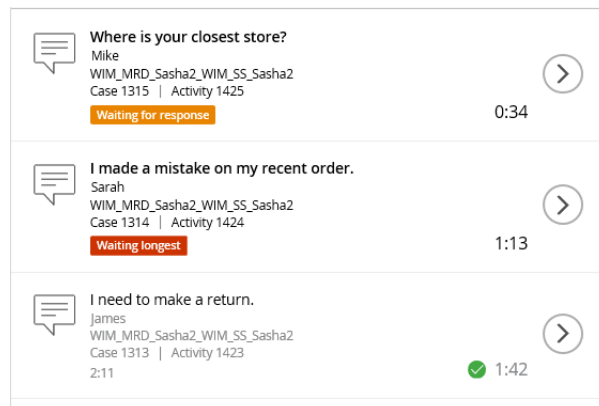
During a chat activity, along with exchanging text messages, an agent can send web pages to a customer.

Depending on the configuration of your system, some of the information a customer may share with you (birth dates, credit card numbers, and so on) can be masked to maintain confidentiality. Customers may also have the option of making their chat interactions go off-record in the event they need to share this sensitive data with the agent. While off-record, the chat transcript is not saved in the system.

Chat Inbox

Chat Status

You can see the status of all the open chat activities in the Chat Inbox. The chat status is indicated using color coding.



View chat status

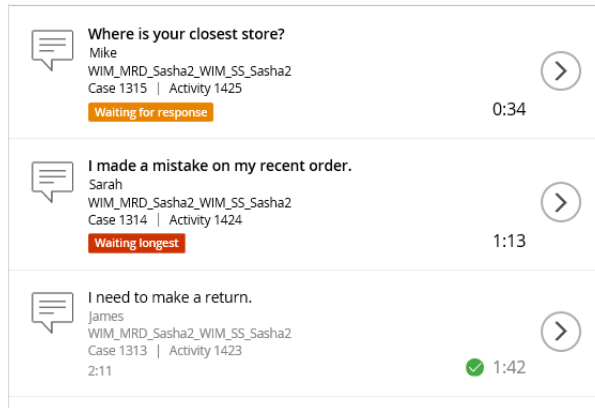
The meaning of each color code is as follows:

- ▶ **Orange:** This means the last message was sent by the customer to the agent . This can be caused by a network error, a problem with the browser, or the customer closing the chat session.
- ▶ **Red:** This means the last message was sent by the customer to the agent and has been waiting the longest for a response from the agent. This is the default chat status when a new chat activity comes into the inbox.
- ▶ **Green (checkmark):** This means the last message was sent by the agent to the customer and the customer has not yet responded to the latest message.

Wait Time Indication

The time next to the clock symbol in the Chat Inbox indicates how long it has been since the last message in the chat session was sent. This clock is reset each time a message is sent.

The time below the wait time indicator is the session duration, and indicates how long the chat session has remained open. This timer begins when the customer's message is first replied to.



View Time waiting for reply


Multitasking With Chat Activities

Chat is a real-time activity. While in a chat session, you have limited access to other work. This is controlled by administrators using the department level setting **Service email and chat activities at the same time**.

- ▶ When the setting is enabled: During a chat, you can continue to respond to email activities that are already assigned to you. The **Send** and **Send and Complete** buttons are enabled for emails. However, no new emails can be assigned to you while you are in a chat session. If you are associated with an outbound MRD, you can create outbound emails during a chat session.
- ▶ When this setting is disabled: During a chat session, you cannot respond to email activities that are already assigned to you. The **Send** and **Send and Complete** buttons are disabled for emails. Also, no new emails can be assigned to you while you are in a chat session. You cannot create outbound emails during a chat session.

Servicing Chat Activities

To send messages to the customer:

1. In the Console sidebar, click the **Chat inbox**  button.
2. Select an activity from your Chat inbox.
3. In the Reply area, type your response and press ENTER on the keyboard to send the message to the customer. Press SHIFT + ENTER to add a line break.

You cannot type more than 800 characters into your response before sending it. There is no limit on the number of messages you or the customer can send to each other during a chat session.

4. The activity remains open until it is completed. For more details, see [“Completing Chats” on page 61](#).

Chat Reply Tools

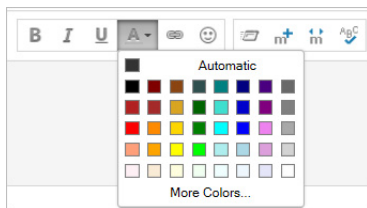
There are multiple methods in which you can add to or improve your replies to customers as you chat with them. From simply changing the color of your font, to pushing pages to customers, there are a variety of tools available to add to and improve your interaction with customers. You can affect your interactions with customers by:

- ▶ [Changing the Text Color](#)
- ▶ [Adding Smileys](#)
- ▶ [Sending Quick Responses](#)
- ▶ [Adding Links](#)
- ▶ [Adding Macros](#)
- ▶ [Performing Spell Check](#)
- ▶ [Pushing Pages](#)
- ▶ [Sending Chat Attachments](#)
- ▶ [Going Off the Record](#)

Changing the Text Color

To change the text color:


- ▶ Select the text in the text box and click the **Text color**  button. Choose the color you want.

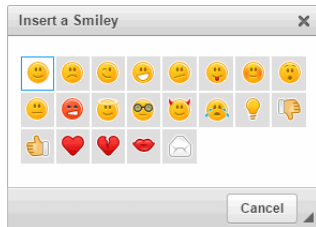


Change the color of the reply text

Adding Smileys

To add a smiley to your message:

- ▶ Click the **Smiley**  button and, from the Insert a Smiley window, select the desired emoticon for your message.




Insert a smiley

Sending Quick Responses

If your administrator has configured quick responses for commonly used chat messages, you can use one to quickly send a page or text reply to the customer.


To send quick responses to the customer:

1. In the text box toolbar, click the **Quick responses**  button.
2. Select the quick response you wish to use. The text of the quick response then appears in the Text box.
3. Review the contents of the quick response and make any changes, as required.
4. Press ENTER to send the message to the customer.

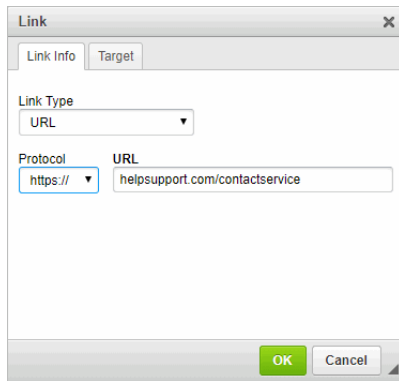
Adding Links

A link can be inserted into the text body of an agent response.

To add links to your message:

1. In the text box toolbar, click the **Add link**  button.

2. In the Link window, from the Link Type menu, select URL.



Type the web address


3. In the URL field, type in the complete URL.
4. Click **OK**.


Adding Macros

Macros are shortcuts that contain paragraphs, simple sentences, or references to customer or user-specific information, such as names, addresses, and phone numbers.

There are multiple methods of adding macros to your responses. In the Text box toolbar, click the **Add macro** button to add macro. To prevent the macro from expanding right away, type the macro name with only two single opening accent marks. The macro is expanded only when the message is sent.

To add macros to replies:


1. In the text box toolbar, click the **Insert Macro**  button.
2. In the Add Macro window, navigate to and select a macro category, such as Combination, Formats, Case Data, etc.
3. In the list that appears on the right, select the desired macro.
4. Click **OK**.

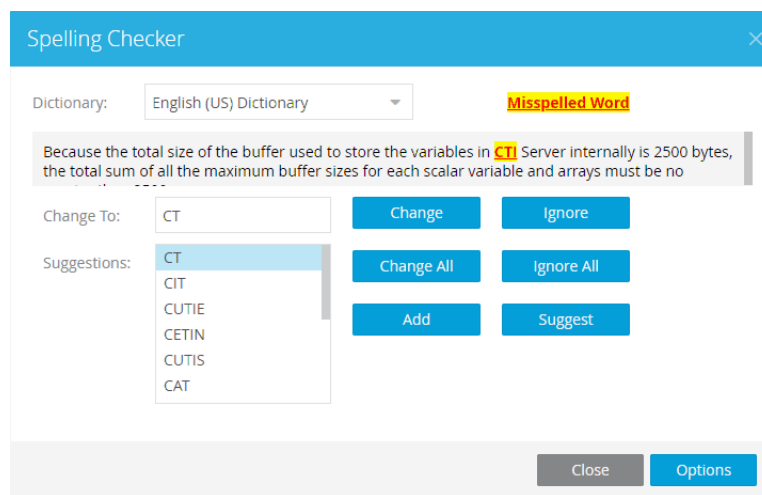
The macro is added to the response with two opening quotes. The macro automatically expands upon sending the reply. However, if you wish to expand the macro prior to sending the reply, click the **Expand Macro**  button.

Performing Spell Check

A spell check can be performed before sending a message to the customer. If your administrator has configured auto spell check, the spelling checker runs automatically every time you send a reply.

To run the spelling checker:

1. In the text box toolbar, click the **Spell Check**  button.
2. If errors are found, The Spelling Check window appears. This button is disabled if the article content is in a language that does not have spell-checker support. The Not in dictionary section shows the misspelled words in red and the Suggestions section shows the suggested words for them. You can either ignore the suggestions or you can change the misspelled word to the suggested words. You can also suggest the word to be added to the dictionary by using the Suggest button. You can also add a word to your personal dictionary by clicking the **Add** button.



Add, change, suggest, or ignore checked words

3. Click the **Options** button to adjust your personal dictionary or spell check settings.
4. When spelling check is complete, click the **OK** button.

If block check is configured, then your message is checked for any blocked words before sending. If the message contains any blocked words, you are displayed a prompt to delete those words before sending the message to the customer.

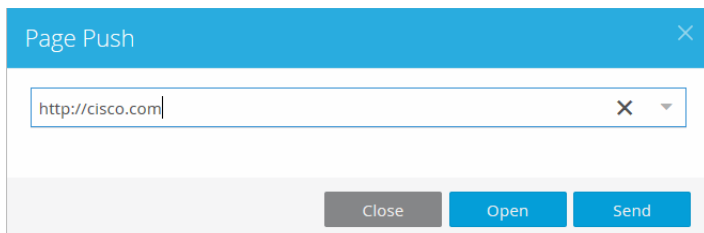
Pushing Pages

During a chat session you can send web pages to customers. You can send web pages only for those chats that come through the entry points for which your administrator has enabled page pushing.

To send a web page to the customer:

1. In the top right corner of the Reply area, click the **More Options** icon and select **Page Push**.
2. In the Page Push dialog window, select or enter the URL of the page you want to send to the customer.

If your administrator has configured any quick links, you can use them to quickly send the web page to the customer. Any pages you have already pushed to customers also appears in this dropdown.



Select a URL

You can preview the page by clicking Open. If this section is configured for pop-up mode, the web page opens in a pop-up window or a new tab.

3. In the Page Push dialog window, click the **Send** button. The customer receives this page and views its contents.
4. To send another page, repeat steps 2-4.

If the administrator has blocked any web pages then you cannot send them to the customer. The blocked pages do not get pushed to the customer, but you can view them in your view port.

Sending Chat Attachments

During a chat session, agents and customers can send file attachments to one another. Once the attachment has been sent by either the agent or the customer, the recipient can accept or deny the file. The recipient must accept the attachment in order to download the file.

If the accepted attachment file is an image, it appears in-line in the chat transcript while the chat interaction is active. You can view all the received and sent attachments in the Activity Body section.

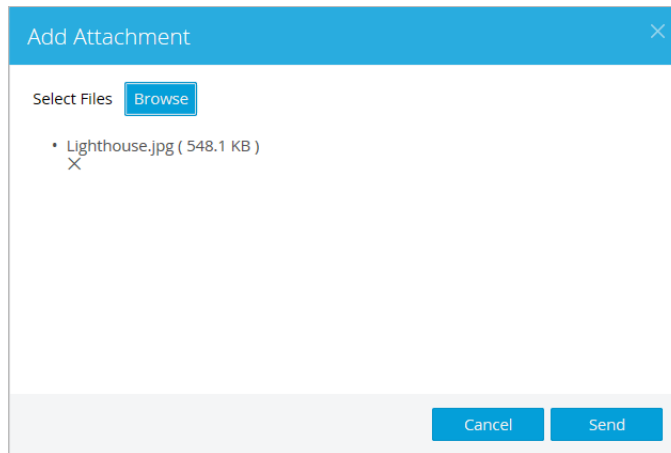


Important: Chat attachments must be enabled at the partition level and configured for the queue in order to send and receive attachments during chats. Depending on the configuration of your deployment, certain file types may be restricted.

To send attachments during a chat:

1. In the top right corner of the Reply area, click the **More Options** icon and select **Attachment**.
2. In the Add Attachment window that appears, click the **Browse** button.


3. In the Choose File to Upload window that appears, navigate to the desired file and click **Open**. The window closes.



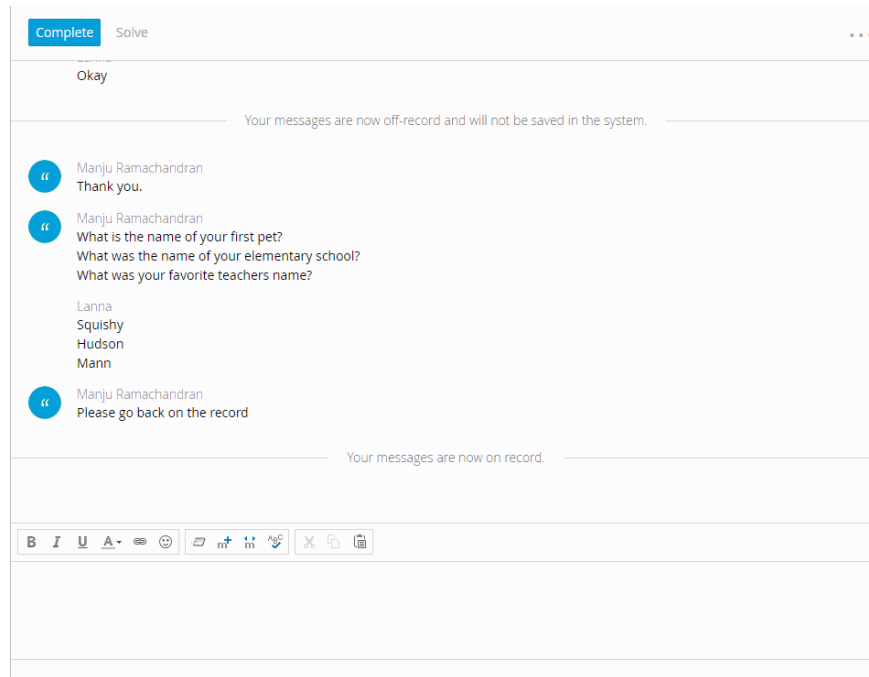
Select a file attachment to send during a chat

4. In the Add Attachment Window, click the **Send** button to send the attachment. If you want to change the file you have selected before sending it, you can browse to a different file and select it or click the **Delete** button to remove the file. You can only send one file at a time.

Going Off the Record

If data masking is enabled, sensitive information you share with the customer (credit card info, etc) may be censored during the chat. The customer can disable the data masking by going “Off the Record”. When the customer clicks the **Go Off Record**  button in the chat window, the data can be shared between the agent and customer, but any messages sent while off the record are not saved in the transcript when the activity is

completed to keep the customer's sensitive information confidential. Customers can go back on-record if they wish to re-enable the masking of sensitive data.



Data is masked in chats until the customer clicks the Go Off Record button

Completing Chats

After when the customers' needs have been met and you wish to end the chat session, you can click the **Complete** button to complete the activity. When you click the **Complete** button, the activity is completed, the Reply area for the activity closes, and the activity appears in the **Completed** folder of the inbox.



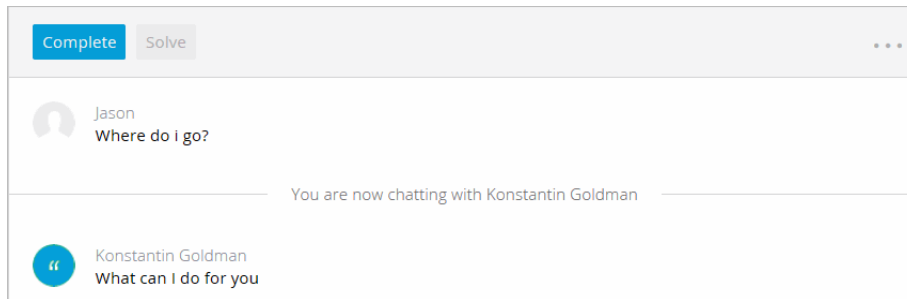
Important: You must complete all chats before logging out of the application.

Once it is completed, a majority of the details pertaining to the activity can no longer be edited. If there are no other open activities in the same case, the case is closed. If, however, there are still other activities belonging to the same case that are still open, the case remains open, while this activity is marked completed.

Completed activities, open cases, and closed cases can all be viewed in the Folders list via the console sidebar. From here, you can review your work or see what else needs to be done to close the associated case.

To complete a chat:

- ▶ In the Reply area toolbar, click the **Complete** button to complete the activity. When you complete a chat the customer is shown a Survey form.



Click the **Complete** button

Viewing Chat Transcripts

In the Activity Body tab of the Activity page, you can view the full transcript of the chat session. The activity transcript can only be viewed for completed chat activities and not for chats that are in progress. The chat transcript contains the complete text of the chat as well as any links to web pages and attachments that were sent during the chat session.

Linking Customers

Your website might be configured to allow visitors to start chat sessions without providing any personal details, such as name, email address, etc. 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 by going to the Customer section and clicking the **Change** button available in the Customer Details tab. Customers must be linked to an activity before the agent completes the activity.

To link a chat activity to a customer:

1. In the Reply area, click the **Link Customer** button.
2. In the Link Customer window, provide the necessary search terms to locate a customer in the system to which you want to associate the activity. By default, the window asks for the name, email address, and phone number, 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.

Transferring Chats

Chats can be transferred to users or queues for which you have been granted transfer permissions. Before transferring an activity, you can check the number of activities in a queue and add notes to the activity in the Transfer Activities window. The customer wait time for a queue is also displayed in the Transfer Activities window.

To transfer a chat:

1. In the Chat Inbox, select the chat you want to transfer.
2. In the Reply area, click the **More Options** button. Select **Transfer** from the dropdown menu.
3. In the Transfer Activities window, set the following:
 - In the **Transfer to** field, from the dropdown list, select **user** or **queue**.
 - In the **Filter Text** field, enter text to reduce the number of results.

From the list of available users or queues, select the one to which you want to transfer the activity. In the Transfer Activities window, the queue from which the activity was assigned to you is tagged with the text *Original* and is displayed at the top of the list.

- Add any necessary notes to the activity in the **Add Notes** field.

Transfer Activities

Activities may be transferred to a queue or a user.

Transfer To: Queue

Filter Text: nc2

Name	Chat Load	Customer Wait Time
MM_MRD_NC2_MM_NC2_DN (Ne...	0	1 minutes

Add Notes:
Possible charge-back issue

Cancel Transfer

Transfer the activity to a new queue

4. Click the **Transfer** button.

Important Things to Note About Transferring Chats:

- ▶ Only one chat activity can be transferred at a time.
- ▶ Only open chat activities, in which the customer has not left the chat session, can be transferred.
- ▶ Disabled users are not listed in the list of users to whom you can transfer activities.

- ▶ You can transfer activities only if you have the Transfer action. For more information about actions and permissions, see the *Enterprise Chat and Email Administrator's Guide to the Administration Console*.

Transferring Chats to Queues:

- ▶ Only agents who match the attributes of a Precision Queue (PQ) that is associated with an ECE queue can transfer chats to that queue.
- ▶ Chats cannot be transferred to departments directly. If the **Allow Transfer of Activities to Integrated Queues in Other Departments** setting is enabled, agents can transfer activities to queues of other departments.
- ▶ A chat can be transferred to any queue that belong to the same media class. From there, the activity is routed based on the queue-to-script mapping.
- ▶ To be able to transfer a chat to a queue, at least one agent who can receive work from that queue must be logged in, must be available, and must not have met the concurrent task limit. The queue must also not be at its maximum task limit.

Transferring Chats to Agents:

Agents who do not meet these conditions are not displayed in the transfer window.

- ▶ Agents can transfer chats to other agents that belong to the same set of skill groups.
- ▶ Only agents who are part of a skill group that is associated with a queue can transfer chats to that queue.
- ▶ The receiving agent must be logged in to the application.
- ▶ The receiving agent must be available, depending on how the **Allow chat transfer to agents who are not available** setting is configured.
- ▶ The receiving agent should not have met the concurrent task limit, unless you are working on non-interruptible chat activities. This may be affected by the **Override CTL** setting.
- ▶ Based on the **Override CTL** setting, agents can transfer additional activities to agents who have reached their concurrent task limit. The maximum number of activities is defined as part of the setting.
- ▶ If the **Allow chat transfer to agents who are not available** setting is enabled, agents can transfer activities to other integrated agents who are not available to work on new activities. To be able to transfer a chat to an agent, the agent must be logged in to the application. Also, the agent should not be at the concurrent task limit (CTL), and the queue associated with the agent should not be at its maximum task limit (MTL). If the CTL and MTL for the agent have been reached, or if the agent is not logged in, the agent is not displayed in the Transfer Activities window.
- ▶ An agent can transfer chat activities to another agent who is working on an interruptible email activity or a non-interruptible chat activity. If the receiving agent is working on a non-interruptible voice call, only interruptible chat activities can be transferred to that agent. Agents working on non-interruptible voice calls cannot be transferred non-interruptible chats.



Activities

- ▶ [About Activities](#)
- ▶ [Searching for Activities](#)
- ▶ [Viewing Activity Information](#)
- ▶ [Modifying Activity Details](#)
- ▶ [Changing the Case of an Activity](#)
- ▶ [Adding Notes to Activities](#)
- ▶ [Adding Classifications to Activities](#)

About Activities

An activity is a unit of work. It may be an interaction between a customer and an agent, or, in the case of a supervisory loop, an interaction between a supervisor and an agent. Interactions can be through email and chat channels. Activities related to the same issue are grouped into a case. A case can contain activities of more than one type.

The state of an activity is either **In Progress** or **Completed**. As long as the issue is unresolved, the activity remains in the **In Progress** state. When the issue is resolved, the activity state is updated to **Completed**.

Types of Activities

- ▶ **Email:** Email activities are created for each electronic mail communication from or to a customer. For more information on working with email activities, refer to [“Emails” on page 34](#).
- ▶ **Chat:** A chat activity is created for each real time interaction with a customer using the chat channel. For more information on working with chat activities, refer to [“Chats” on page 52](#).
- ▶ **Callback:** A callback activity is created each time a chat interaction is initiated from a callback entry point, and the system successfully places a call to the customer.
- ▶ **Delayed callback:** A delayed callback activity is created each time a chat interaction is initiated from a delayed callback entry point, and the system successfully places a call to the customer.

For more information on chat, callback, and delayed callback, refer to [“Chats” on page 52](#).

Working with Activities

All activities, irrespective of type, have certain common elements, and common methods of working with these elements. Such information is presented in this chapter. Functionality that is specific to a particular type of activity is discussed in the chapter dedicated to that activity type. Information about replying to emails is presented in the [Emails](#) chapter and information about working on chats is in the [Chats](#) chapter.

The majority of your work with activities that is not related to replying to emails or chats is performed in the Console toolbar, Console sidebar, and Information bar.

- ▶ View activity details including the body of the activity. See [“Viewing Activity Details and Body” on page 71](#).
- ▶ Change the priority of an activity. See [“Changing Priority of Activities” on page 73](#).
- ▶ Set the due date of an activity. See [“Changing Due Date of Activities” on page 74](#).

Searching for Activities

Activities can be assigned and located within the Agent Console in multiple ways. One of the most convenient methods of locating an activity to view its information is by using the console search. You can use any of the following parameters to locate activities and archived activities:

- ▶ Activity ID

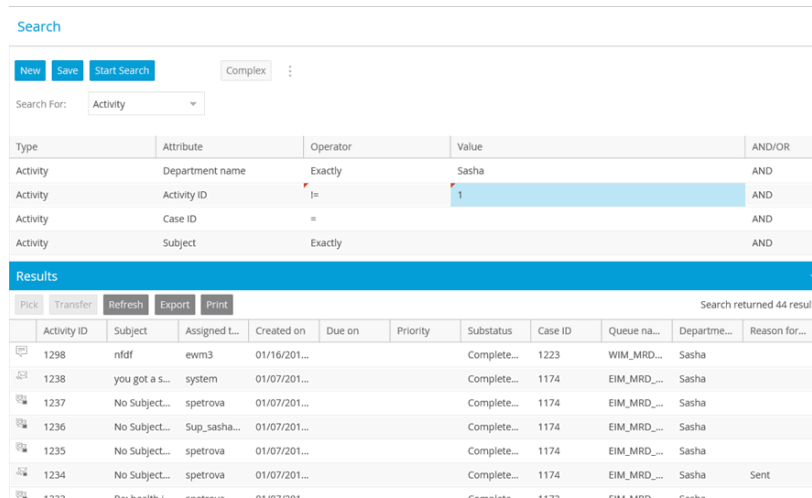
- ▶ Activity Subject
- ▶ Case ID
- ▶ Customer Name
- ▶ Customer Email Address
- ▶ Customer Phone Number

When running a search, you have the option of performing a Simple search or a Complex search. A Simple search conducts a search based on the different criteria that is directly related the search subject, while a Complex search allows you to add multiple criteria as a method of cross-referencing information to find activity you are looking for.

Running Simple Searches for Activities

To run a simple search for activities:

1. In the console sidebar, click the **Search** button.
2. From the **Search For** dropdown menu, select **Activity**.
3. The Search page refreshes to display the list of attributes available. Input an operator for the search criteria. Operators include: Exactly, Begins with, Contains, Does not contain, Ends with, =, !=, <, <=, >, >=, Between, Not between.
4. Input a value for the search criteria. You can search for special characters such as umlaut characters (Ö, ü, ï), : "" etc. If you are using the Exactly operator, you can also use the following special characters (\$ & * ^ % _ () # ") in your search criteria. At least one search criteria is required to perform a search.



Create a new search

5. Click the **Start Search** button.
6. Search results are displayed in the Results section. To view more information about the activity, click the object hyperlink. You can export the search results to a . csv format by clicking the **Export** button. You can also print your search results by clicking the **Print** button and using the browser's print options.

At any point, you can change the search parameters and click the **Start Search** button again to run a new search. Or you can click the **New** button to start the process over.

Running Complex Searches for Activities

To run a complex search for activities:

1. In the console sidebar, click the **Search** button.
2. From the **Search For** dropdown menu, select **Activity**.
3. Click the **Complex** button. The page refreshes.
4. Click the **Add New Criteria** button.
5. The Options window opens. From the **Type** dropdown, select the object type for the search criteria.
6. From the **Attribute** dropdown, select one of the available attributes. This list changes based on the type you selected.
7. Select an operator from the **Operator** dropdown. Operators include: Exactly, Begins with, Contains, Does not contain, Ends with, =, !=, <, <=, >, >=, Between, Not between.
8. Input a value. The inputs for this field change based on the attribute and operator you selected. You can search using special characters such as umlaut characters (Ö, ü, ï), : "" etc. If you are using the Exactly operator, you can also use the following special characters (\$ & * ^ % _ () # ") in your search criteria.
9. Select **AND** or **OR** from the **Boolean** dropdown.
10. Click **OK** to close the Options window.
11. Repeat the process to add more search criteria as necessary. At least one search criteria is required to perform a search. You can edit your criteria by clicking the **Edit** icon. You can delete the criteria by click the **Delete** icon. When you have added all your necessary search criteria, click the **Start Search** button.

The screenshot shows the Search interface. At the top, there are buttons for 'New', 'Save', and 'Start Search', along with a 'Simple' dropdown. Below this is a 'Search For:' dropdown set to 'Activity'. An 'Add New Criteria' button is visible. The main area contains a table for search criteria with columns: Type, Attribute, Operator, Value, and AND/OR. One criterion is shown: Type 'Case', Attribute 'Case status', Operator '=', Value 'Closed', and AND/OR 'AND'. Below the criteria table is a 'Results' section with a blue header and buttons for 'Pick', 'Transfer', 'Refresh', 'Export', and 'Print'. A message indicates 'Search returned 44 results'. The results table has columns: Activity ID, Subject, Assigned To, Created on, Due on, Priority, Substatus, Case ID, Queue na..., Departme..., and Reason for... The table lists several activities, including those with subjects like 'nfd', 'you got a s...', 'No Subject...', and 'Sup_sasha...'. Each row shows the activity ID, subject, assigned to (e.g., 'ewm3', 'spetrova', 'Sup_sasha...'), creation date (01/07/201...), due date (01/07/201...), priority, substatus (Complete...), case ID (1223, 1174), queue name (WIM_MRD...), department (Sasha), and reason for... (Sent).

Add search criteria to the complex search as needed.

- Search results are displayed in the Results section. To view more information about the activity, click the object hyperlink. You can export the search results to a .csv format by clicking the **Export** button. You can also print your search results by clicking the **Print** button and using the browser's print options.

Saving and Reopening a Search for Activities

You can save the search criteria that you use most commonly. This helps you save time, as you can open the saved search criteria and run them quickly.

To save search criteria:

- In the Search view, create a search by entering the search criteria that you wish to save.
- To save the search, click the **Save** button. You can also use the **Save As** option from the **More** button.
- In the Save Search window, provide the following details.
 - Name:** Type a name for the search criteria. Use a name that adequately represents the search attributes.
 - Type:** From the dropdown list, select the type of search. The options available are:
 - Global:** A global search is available to all users. This option is not available to agents who have not been assigned the **Saved search - Create** action.
 - Personal:** A personal search is available only to the user who creates it.

Name	Type	User	Modified on
Activity Search	Personal	sasha1_chestakova	2019-02-21 19:20:20

Name:

Type:

Provide the name and type for the saved search

- Click the **Save** button to save the search criteria.



To open a saved search:

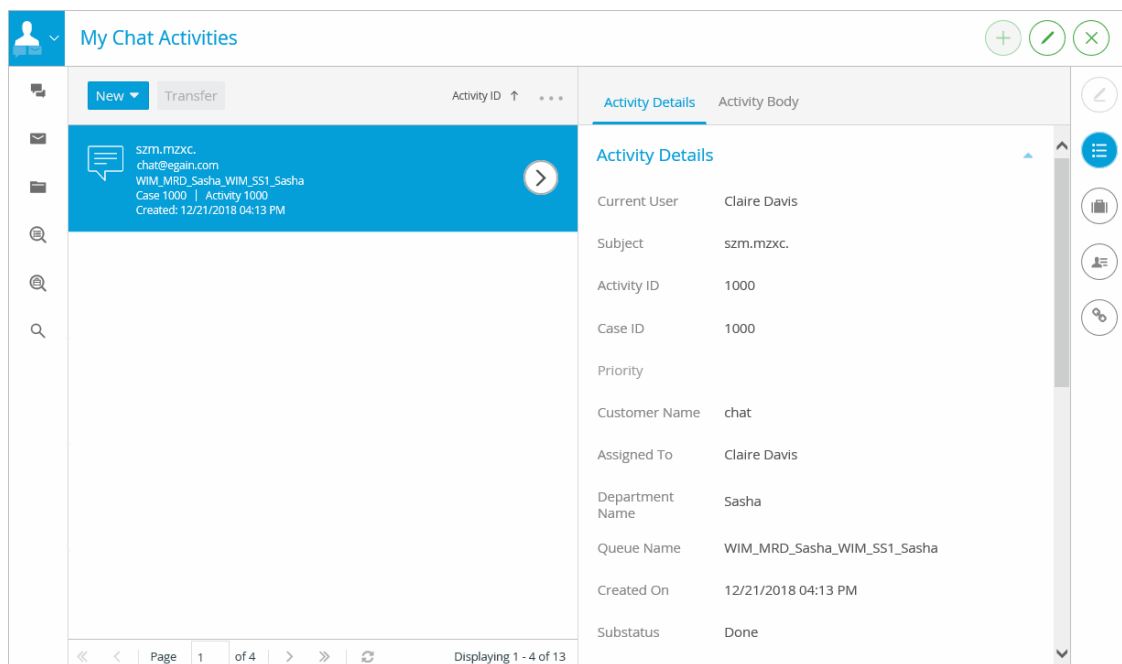
- In the Search view, click the **Open** option from the **More** button.
- In the Open Search window, select the saved search.
- Click the **Open** button.

Creating Activity Search Folders

Folders can be created to save any search you have conducted for activities. These search folders can be used as quick references when searching for activities.



To create folders under My Searches for activities:

1. In the console sidebar, click the **My Activity Search**  button.
2. Click the **Add Folder**  button. The New Search window opens.
3. Enter the Folder Name and Folder Description.
4. Enter the Search criteria for the folder from the Complex and Simple views. For more details about running searches, see [“Running Simple Searches for Activities” on page 67](#) and [“Running Complex Searches for Activities” on page 68](#).
5. Select the **Make this folder visible to agents** checkbox if you want the folder to be visible to other agents.
6. Click **OK** to save the search folder. The folder can now be accessed in the My Searches folder at any time. When the folder is selected, the search results appear in the inbox, where you can select an activity to display its details.





View the details of the search results

To edit a search folder for activities:

1. In the console sidebar, click the **My Activity Search**  button.
2. Click the **Edit Folder**  button.
3. In the Edit Search window, make your changes to the search criteria.
4. Click the **OK** button


To delete a search folder for activities:

1. In the console sidebar, click the **My Activity Search**  button.
2. Click the **Delete Folder**  button.
3. In the window that appears, click the **Yes** button to confirm your decision to delete the folder.

Viewing Activity Information

Viewing Activity Details and Body

To view the activity details and body:

- ▶ In the Information bar, click the **Activity**  button. The Activity section appears. Here you can view the details of the activity, including:
 - **Activity ID:** The activity ID of the chat selected in the inbox.
 - **Case ID:** The case ID of the case associated with the activity. If there is no case associated with an activity, then this field is blank.
 - **Priority:** The priority of the activity. By default there is no priority set for the activity.
 - **Customer Name:** The name of the customer associated with the chat activity.
 - **Assigned To:** The name of the agent to whom the activity is assigned.
 - **Contact Point:** The contact point associated with the activity.
 - **Department Name:** The name of the department to which the activity belongs.
 - **Queue Name:** The name of the queue from which the chat came to the agent.
 - **Created On:** The date and time when the chat was created.
 - **Substatus:** The current status of the chat activity, such as In Progress, Abandoned, etc.
 - **Due On:** The due date for completion of the activity.

- **Due At:** The time of the due date at which the activity is due. Select from the 30-minute intervals in dropdown menu or type in the specific time at which the activity is due. The due date must be established in order to set a due time.

Activity Details	
Activity ID	1005
Priority	<input type="text"/>
Case ID	1005
Assigned To	Goldman Konstantin
Contact Point	rel_fit@rft.com
Department Name	Service
Due On	<input type="text"/>
Due At	<input type="text"/>

Save

View activity details and body

Depending on how your system is configured, some custom attributes configured by your administrator may also be present in the activity details for you to view and edit.

- ▶ In the Activity Body section, you can view and print the content of the activity. If the selected activity is a chat activity, you can scroll through the chat transcript. The chat transcript is not available for viewing in the Activity Body section until the activity has been completed.

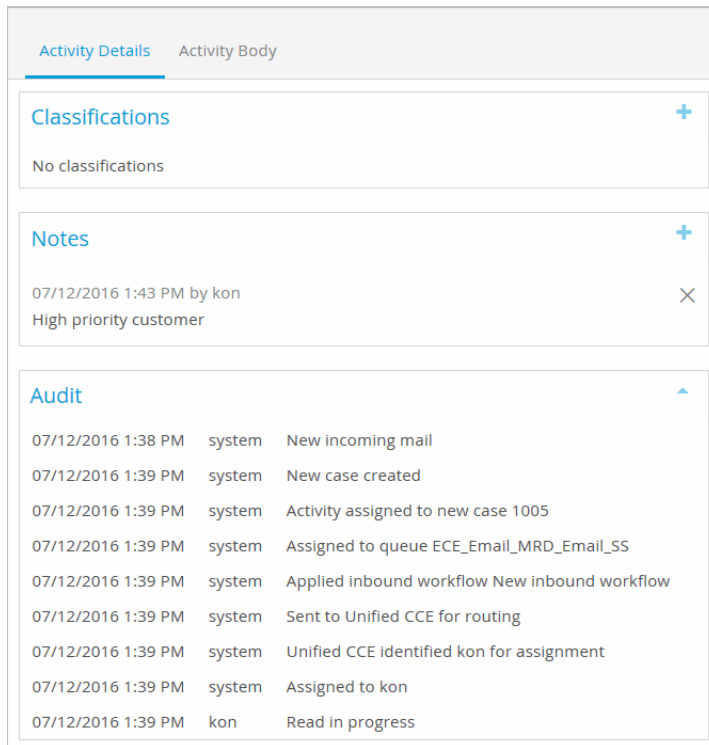
To print the body of the activity, click the **Print**  button and use the browser's print options.

Viewing Audit Information

The audit of an activity shows every single action that has occurred on an activity. It gives complete information from the moment the activity was created to where the activity is at present. Supervisory activities are also included in the audit information.

To view the audit information:

- ▶ In the Activity Details page, go to the Audit section and expand the area. Here you can view the audit information.



The screenshot shows the 'Activity Details' page with the 'Activity Body' tab selected. The 'Audit' section is expanded, displaying a list of audit events. The events are as follows:

Timestamp	User	Action
07/12/2016 1:38 PM	system	New incoming mail
07/12/2016 1:39 PM	system	New case created
07/12/2016 1:39 PM	system	Activity assigned to new case 1005
07/12/2016 1:39 PM	system	Assigned to queue ECE_Email_MRD_Email_SS
07/12/2016 1:39 PM	system	Applied inbound workflow New inbound workflow
07/12/2016 1:39 PM	system	Sent to Unified CCE for routing
07/12/2016 1:39 PM	system	Unified CCE identified kon for assignment
07/12/2016 1:39 PM	system	Assigned to kon
07/12/2016 1:39 PM	kon	Read in progress


View audit details

Modifying Activity Details

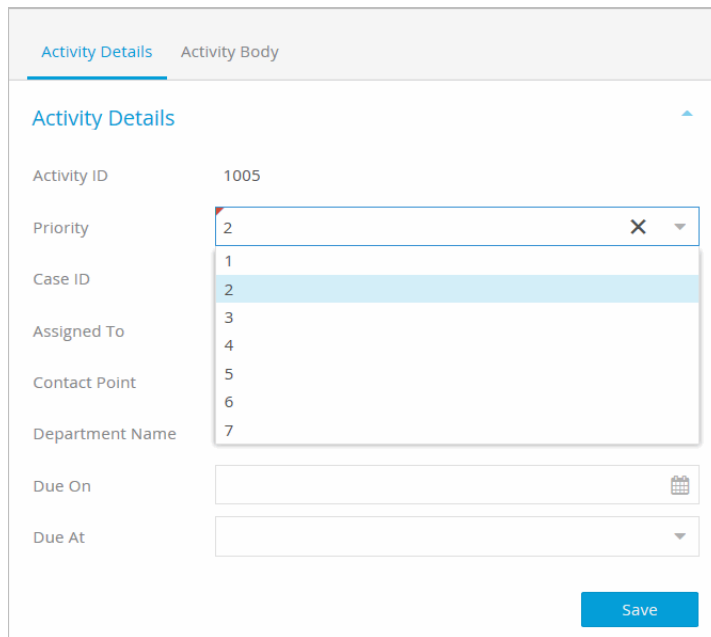
Changing Priority of Activities

For activities, you can set a priority from 1 to 7, where 1 is the highest priority and 7 is the lowest priority.

To change the priority:

1. In the Information bar, click the **Activity**  button.

2. In the Priority field of the Activity Details page, select the priority of the activity from the dropdown list.




The screenshot shows the 'Activity Details' page for an activity with ID 1005. The 'Priority' field is currently set to 2, and a dropdown menu is open, displaying a list of priority options from 1 to 7. The option '2' is highlighted in blue. Other fields include 'Case ID', 'Assigned To', 'Contact Point', and 'Department Name', all of which are currently empty. There are also 'Due On' and 'Due At' fields, with 'Due On' having a calendar icon and 'Due At' having a dropdown arrow. A blue 'Save' button is located at the bottom right of the form.

Set a priority of the activity

3. Click the **Save** button.

Changing Due Date of Activities

To change the due date:

1. In the Information bar, click the **Activity**  button.

2. In the Activity page, in the **Due on** field, click the dropdown button. From the calendar select a date. You can also type the date in the field, in the format dd/mm/yyyy.

The screenshot shows the 'Activity Details' page for Activity ID 1005. The 'Due On' field is currently empty and has a calendar icon to its right. A calendar dropdown is open, showing the month of July 2016. The date 13 is highlighted with a red box. The calendar includes a 'Today' button at the bottom. Other fields visible include Priority (2), Case ID (1005), Assigned To (Goldman Konstantin), Contact Point (rel_fit@rft.com), and Department Name (Service). A 'Save' button is located at the bottom right of the form.


Set a due date for the activity

3. In the **Due at** field, specify the time when the activity is due.
4. Click the **Save** button.

Changing the Case of an Activity

The system allows you to manually change the case associated with an activity to another existing case. If your administrator has enabled it in the inbound workflows, all new cases assigned to the activity become associated with each other and can be found in the Related Cases tab of the Case section in the Information bar.

To change the case:

1. In the inbox, select the activity for which you want to change the case.
2. In the Information bar, click the **Case**  button.
3. On the Case Details page, click the **Change case** button.

4. On the Search page, search for the case with which you wish to associate the activity.

Search

Search for new case for activity 1005

[Cancel](#) [Start Search](#)

Type	Attribute	Operator	Value	Boolean
Case	ID	>	1000	AND
Case	Status	=		AND
Customer	Name	Exactly		AND
Customer	Email Address	Exactly		AND

Results

[Change case](#) [Refresh](#)

Case ID	Status	Customer ID
1005	Open	Ariel Feist
1004	Open	Ariel Feist
1003	Closed	Paula Winkirk
1002	Closed	John
1001	Open	Kunal01



Change the case of the activity

5. From the Results area, select the case.
6. Click the **Change Case** button.

Adding Notes to Activities

Notes are a collaborative tool for agents and supervisors. Meant for internal use, notes are used to share tips and information with other agents or supervisors. Notes added to the activity stay with it if the activity is transferred to another user or queue. Other users can then view these previous notes, as well as add their own.

To add a note to an activity:

1. In the inbox, select the activity to which you want to add a note.
2. In the Information bar, click the **Activity**  button.
3. In the Notes section, click the **Add**  button.
4. Enter your note in the text area.
5. When your note is complete, click the **Add Notes** button.
6. Click the **Delete** button next to the note to remove it from the activity.



Important: You can also add and remove notes to email activities via the More Options menu.

Adding Classifications to Activities

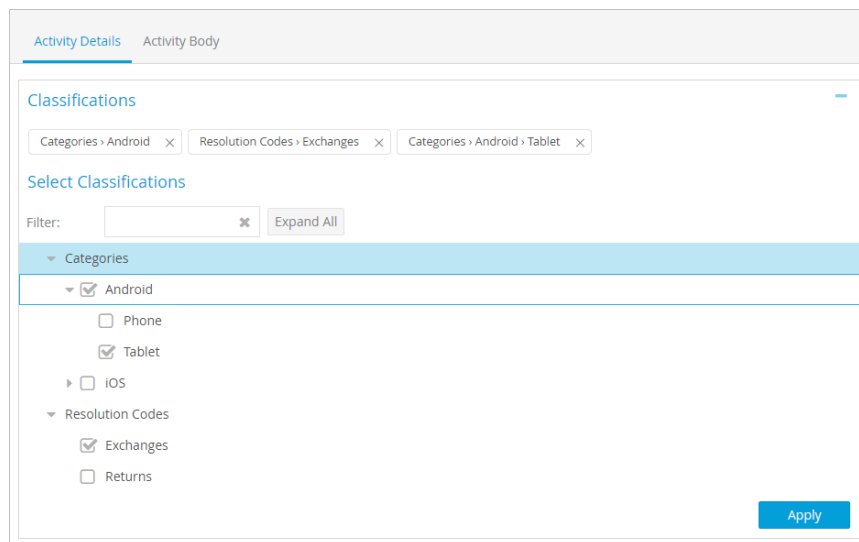
Classifications are an arrangement of resources to identify activities and their solutions. As you work on an activity, you can view, add, and remove classifications to help supervisors and administrators track activities through the system. Classifications are of two types:

- ▶ Categories
- ▶ Resolution codes

Depending on how your administrator has configured the system, activities may be automatically assigned categories and resolution codes before the activities are assigned to you.

To add classifications to an activity:

1. In the Information bar, click the **Activity**  button.
2. In the Activity Details page, expand the Classifications section by clicking the **Add**  button.



Locate and add classifications


3. In the Select Classification section, expand the categories or resolution codes lists and choose the desired classifications. You can filter the classifications with the search bar, or click the **Expand All** button to quickly locate the classifications.
4. With the classification selected, click the **Apply** button. All the selected classifications appear as tags at the top of the section. If you need to remove a classification, click the Delete icon in the tag.

6 Cases

- ▶ [About Cases](#)
- ▶ [Viewing Case Information](#)
- ▶ [Searching for Cases](#)
- ▶ [Changing Due Date of Cases](#)
- ▶ [Changing Solution Description of Cases](#)
- ▶ [Changing Severity](#)
- ▶ [Closing Cases](#)
- ▶ [More About Cases and Activities](#)

About Cases

A case is used to group activities related to the same issue. Activities are tied to a case using a single identification number, the Case ID. A single case can contain activities of email and chats.


A case is in one of two states: open or closed. If the case contains any open activities, then the status of the case remains open. When all the activities held within a case are completed, the case is closed. Open cases, closed cases, and recent cases (cases that were closed within the past 14 days) can be viewed under the Folders list by clicking the **Folders**  button in the Console sidebar.

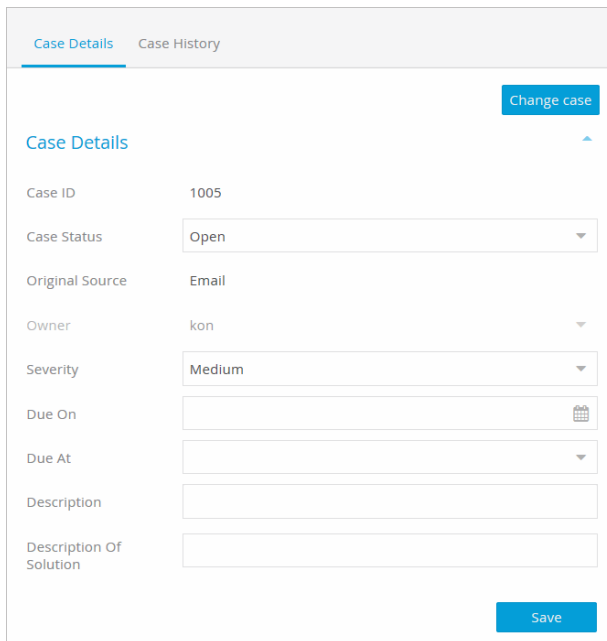
A closed case is reopened when a new activity is associated with it. For example, if an agent creates a new activity using a closed case number, the system automatically reopens the case. It can also be reopened using the workflow. A case can be configured to reopen automatically when a customer sends an email with the closed case number in the subject line of the email. You cannot reopen cases manually.

For each Callback and Delayed Callback activity, the application creates a new activity and a new case for that activity. This case is closed automatically when the application gets a message from Unified CCE that the outgoing call was placed successfully.

Viewing Case Information

To view case information:

1. In the Information bar, click the **Case**  button.
2. In the Case details page, view the properties of the case, the due dates, and related cases, if there are any.



Case Details		Case History
Change case		
Case Details		
Case ID	1005	
Case Status	Open	
Original Source	Email	
Owner	kon	
Severity	Medium	
Due On	<input type="text"/>	
Due At	<input type="text"/>	
Description	<input type="text"/>	
Description Of Solution	<input type="text"/>	
Save		

View case details

3. In the Case Details page, you can also print the details of the case. To print the case details, click the **More options** button and select the **Print** option. Then, use the browser's print options.

Searching for Cases

Cases can be assigned and located within the Agent Console in multiple ways. One of the most convenient methods of locating cases to view its information is by using the console search. You can use any of the following parameters to locate cases and archived cases:

- ▶ Case ID
- ▶ Case Status
- ▶ Customer Name
- ▶ Customer Email Address
- ▶ Customer Phone Number

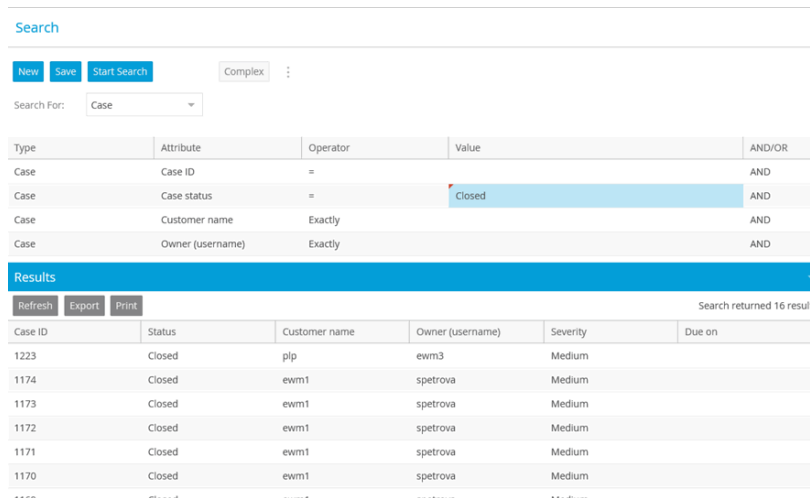
When running a search, you have the option of performing a Simple search or a Complex search. A Simple search conducts a search based on the different criteria that is directly related the search subject, while a Complex search allows you to add multiple criteria as a method of cross-referencing information to find the case you are looking for.

Running Simple Searches for Cases

To run a simple search for cases:

1. In the Console sidebar, click the **Search** button.
2. From the **Search For** dropdown menu, select **Case**.
3. The Search page refreshes to display the list of attributes available. Input an operator for the search criteria. Operators include: Exactly, Begins with, Contains, Does not contain, Ends with, =, !=, <, <=, >, >=, Between, Not between.

- Input a value for the search criteria. You can search for special characters such as umlaut characters (Ö, ü, ï), : “” etc. If you are using the Exactly operator, you can also use the following special characters (\$ & * ^ % _ () # ") in your search criteria. At least one search criteria is required to perform a search.



Create a new search

- Click the **Start Search** button.
- Search results are displayed in the Results section. To view more information about the case, click the object hyperlink. You can export the search results to a . csv format by clicking the **Export** button. You can also print your search results by clicking the **Print** button and using the browser’s print options.

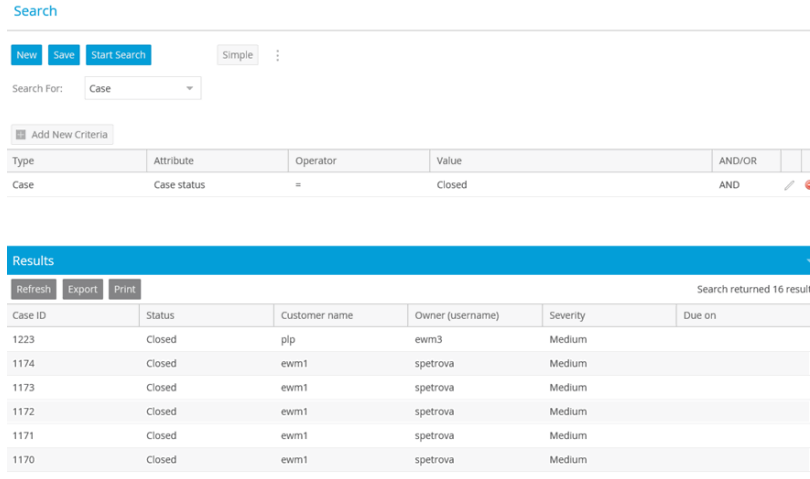
At any point, you can change the search parameters and click the **Start Search** button again to run a new search. Or you can click the **New** button to start the process over.

Running a Complex Search for Cases

To run a complex search for cases:

- In the console sidebar, click the **Search** button.
- From the **Search For** dropdown menu, select **Case**.
- Click the **Complex** button. The page refreshes.
- Click the **Add New Criteria** button.
- The Options window opens. From the **Type** dropdown, select the object type for the search criteria.
- From the **Attribute** dropdown, select one of the available attributes. This list changes based on the type you selected.
- Select an operator from the **Operator** dropdown. Operators include: Exactly, Begins with, Contains, Does not contain, Ends with, =, !=, <, <=, >, >=, Between, Not between.
- Input a value. The inputs for this field change based on the attribute and operator you selected. You can search using special characters such as umlaut characters (Ö, ü, ï), : “” etc. If you are using the Exactly operator, you can also use the following special characters (\$ & * ^ % _ () # ") in your search criteria.
- Select **AND** or **OR** from the **Boolean** dropdown.

10. Click **OK** to close the Options window.
11. Repeat the process to add more search criteria as necessary. At least one search criteria is required to perform a search. You can edit your criteria by clicking the **Edit** icon. You can delete the criteria by click the **Delete** icon. When you have added all your necessary search criteria, click the **Start Search** button.



Add search criteria to the complex search as needed.

12. Search results are displayed in the Results section. To view more information about the case, click the object hyperlink. You can export the search results to a .csv format by clicking the **Export** button. You can also print your search results by clicking the **Print** button and using the browser's print options.

Saving and Reopening a Search for Cases

You can save the search criteria that you use most commonly. This helps you save time, as you can open the saved search criteria and run them quickly.

To save search criteria:

1. In the Search view, create a search by entering the search criteria that you wish to save.
2. To save the search, click the **Save** button. You can also use the **Save As** option from the **More** button.
3. In the Save Search window, provide the following details.
 - **Name:** Type a name for the search criteria. Use a name that adequately represents the search attributes.
 - **Type:** From the dropdown list, select the type of search. The options available are:
 - **Global:** A global search is available to all users. This option is not available to agents who have not been assigned the **Saved search - Create** action.

- **Personal:** A personal search is available only to the user who creates it.

Name	Type	User	Modified on	
Activity Search	Personal	sasha1_chestakova	2019-02-21 17:59:14	

Name:

Type:

Provide the name and type for the saved search

4. Click the **Save** button to save the search criteria.

To open a saved search:

1. In the Search view, click the **Open** option from the **More** button.
2. In the Open Search window, select the saved search.
3. Click the **Open** button.

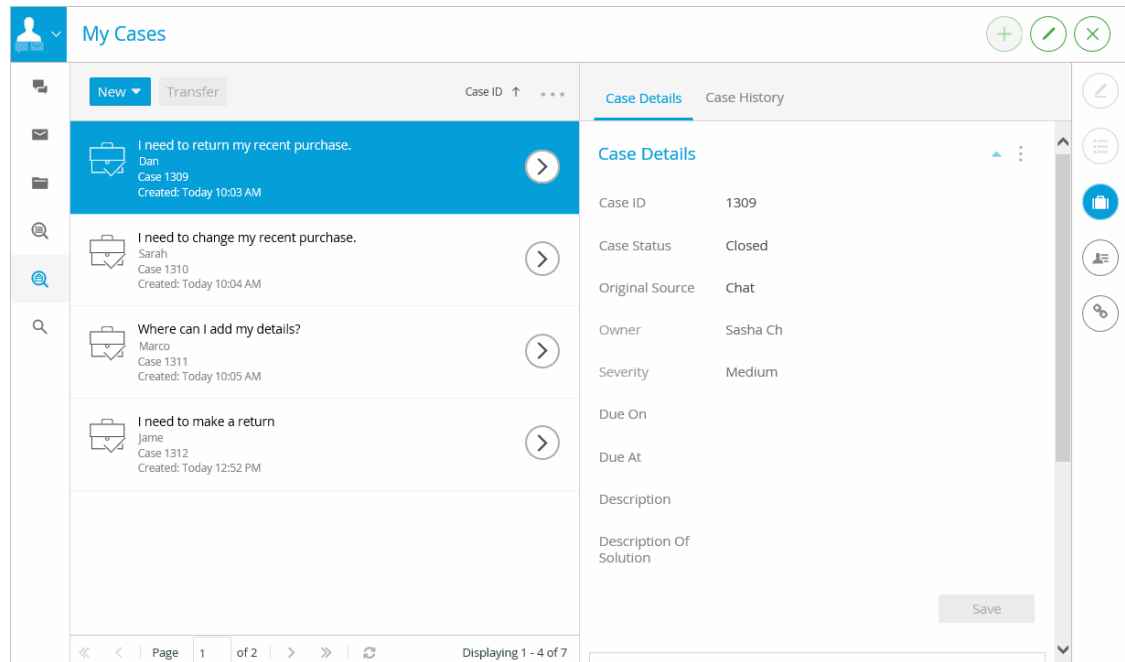
Creating Case Search Folders

Folders can be created to save any search you have conducted for cases. These search folders can be used as quick references when searching for cases.

To create folders under My Searches for cases:



1. In the console sidebar, click the **My Case Search** button.
2. Click the **Add Folder** button. The New Search window opens.
3. Enter the Folder Name and Folder Description.
4. Enter the Search criteria for the folder from the Complex and Simple views. For more details about running searches, see [“Running Simple Searches for Cases” on page 80](#) and [“Running a Complex Search for Cases” on page 81](#).
5. Select the **Make this folder visible to agents** checkbox if you want the folder to be visible to other agents.

- Click **OK** to save the search folder. The folder can now be accessed in the My Searches folder at any time. When the folder is selected, the search results appear in the inbox, where you can select an activity to display its details.





View the details of the search results

To edit a search folder for cases:


- In the console sidebar, click the **My Case Search**  button.
- Click the **Edit Folder**  button.
- In the Edit Search window, make your changes to the search criteria.
- Click the **OK** button

To delete a search folder for cases:

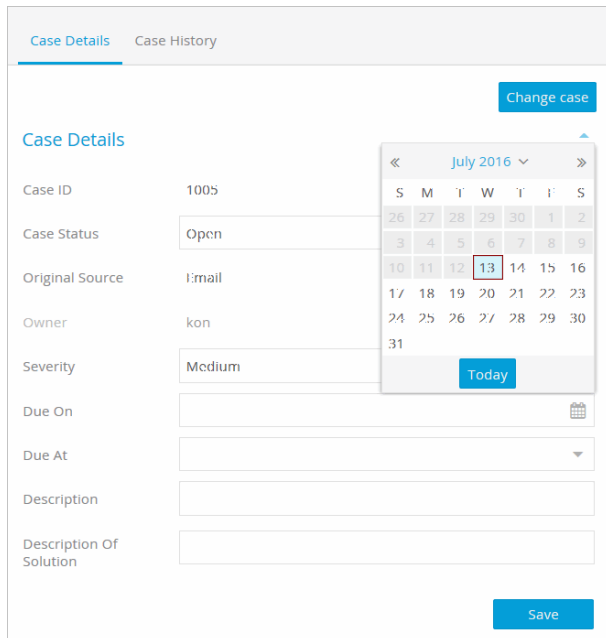
- In the console sidebar, click the **My Case Search**  button.
- Click the **Delete Folder**  button.
- In the window that appears, click the **Yes** button to confirm your decision to delete the folder.

Changing Due Date of Cases

To change the due date:

- In the Information bar, click the **Case**  button.
- In the Case Details page, in the **Due on** field, click the dropdown button.

From the calendar select a date. You can also type the date in the field, in the format dd/mm/yyyy.




The screenshot shows the 'Case Details' form with a calendar overlay. The form fields are: Case ID (1005), Case Status (Open), Original Source (Email), Owner (kon), Severity (Medium), Due On (empty), Due At (dropdown), Description (text area), and Description Of Solution (text area). A 'Change case' button is at the top right, and a 'Save' button is at the bottom right. The calendar overlay shows July 2016 with the 13th highlighted. A 'Today' button is at the bottom of the calendar.

Set due date for a case

3. In the **Due at** field, specify the time when the case is due.
4. Click the **Save** button.


Changing Solution Description of Cases

To change the solution description:

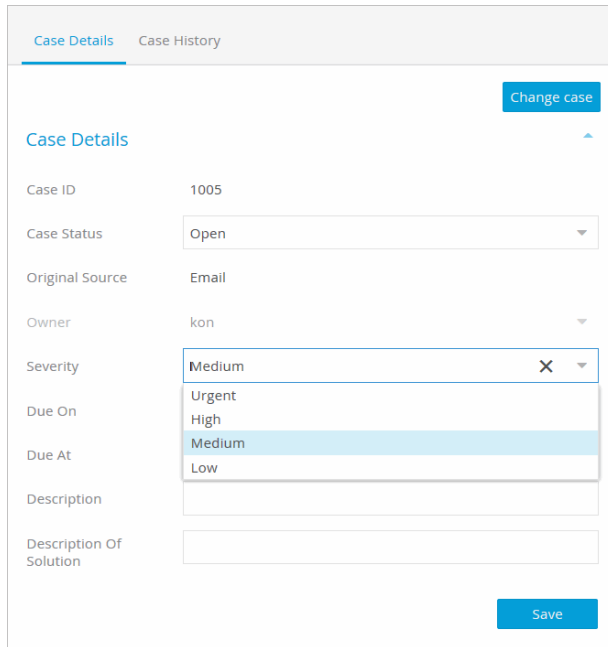
1. In the Information bar, click the **Case**  button.
2. In the Case Details page, in the **Description of solution** field, provide a brief description of the solution.
3. Click the **Save** button.

Changing Severity

To change the severity of a case:

1. In the Information bar, click the **Case**  button.
2. In the Case section, in the **Severity** field, select the severity of the case.

You can set the severity level as low, medium, high, or urgent.



The screenshot shows a web interface for editing a case. At the top, there are two tabs: "Case Details" (active) and "Case History". A "Change case" button is in the top right. The "Case Details" section contains several fields: Case ID (1005), Case Status (Open), Original Source (Email), Owner (kon), Severity (Medium), Due On, Due At, Description, and Description Of Solution. The Severity dropdown menu is open, showing options: Urgent, High, Medium (highlighted), and Low. A "Save" button is at the bottom right.


Change severity of a case

3. Click the **Save** button.

Closing Cases

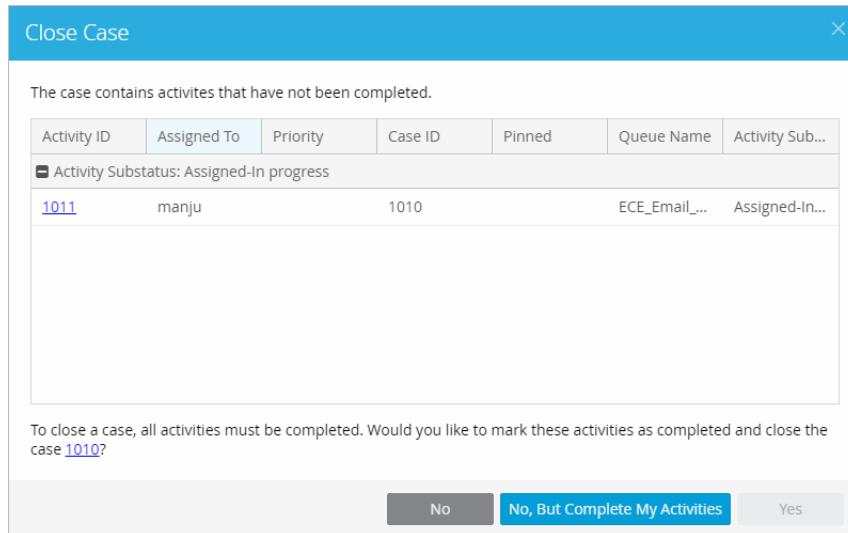
You cannot close a case if the only open activities for the case are outbound activities.

To close a case:

1. In the Information bar, click the **Case**  button.
2. On the Case Details page, in the **Case status** field select **Closed**.
3. Click the **Save** button.

If the case has any activities that are not completed, a Close Case window appears.

4. In the Close Case window click the **Yes** button to complete all activities assigned to you, and close the case. If there are any activities of the same case assigned to other agents, and you wish to complete all of the activities assigned to you, click the **No, But Complete My Activities** button. The Close Case prompt appears only if the open activities belong to the same MRD to which the agent belongs.



*Click **Yes** to complete the activities and close the case*

More About Cases and Activities

In addition to the tasks listed in this chapter, you can also change the case associated with an activity. For more information, refer to [“Changing the Case of an Activity” on page 75](#).



Customers

- ▶ [About Customers](#)
- ▶ [Viewing Customer Information](#)
- ▶ [Searching for Customers](#)
- ▶ [Changing Customer Details](#)
- ▶ [Changing Contact Details of Customers](#)
- ▶ [Creating Customers](#)
- ▶ [Adding Notes to Customers](#)
- ▶ [Changing Customers](#)
- ▶ [Merging Customers](#)
- ▶ [Deleting Customers](#)

About Customers


In the Agent Console, customers are the individuals who contact an organization. These individuals can be defined by agents in the Agent Console through the Create Customer button, or automatically by the system through inbound email and chat information. Each customer is listed as an individual, but may actually be a designated contact person for a company.

Viewing Customer Information

The Agent Console allows you to view detailed information on each customer. Information that may be populated for the customer include, but is not limited to, their age, gender, date of birth, occupation, and any relevant contact points such as phone numbers and emails.

There are multiple methods of viewing customer information. You can look directly at customer details via search, or you can look at the customer information as it relates to an activity you are currently working on. The steps below discuss how to view customer information while working on activities. For more information on accessing customer details through searches, see [“Searching for Customers” on page 90](#).

To view the customer details:

1. Select an activity that is attached to the customer you wish to view. The activity can be an open chat or email activity you’re currently working on, or a completed activity you’re editing via the Folders list or search option. For more information about activities, see the following:
 - For accessing activities through searches, see [“Searching for Activities” on page 66](#).
 - For accessing completed activities, see [“Activities” on page 65](#).
 - For working on email activities, see [“Emails” on page 34](#).
 - For working on chat activities, see [“Chats” on page 52](#).
2. With an activity selected, click the **Customer**  button.

3. In the Customer Details section, you can view the customer details such as name, contact details, notes, and the number of cases they have had. From here you can further review the customer information and history, as well as edit their contact information.

Customer Details Customer History

Mike Delete

Open Cases	Closed Cases	Recent Cases
1	0	1

Notes +

No notes

Contact information

First Name	Mike
Last Name	Ike
Date Of Birth	07/12/1988
Gender	Male

Contacts

Email	Mike@m.com	X
Home Address	123 Street Ln., The Big City	X

View the customer details

Searching for Customers

Customers can be assigned and located within the Agent Console in multiple ways. One of the most convenient methods of locating a customer to view its information is by using the console search. You can use any of the following parameters to locate customers:

- ▶ Customer Name
- ▶ Customer Email Address
- ▶ Customer Phone Number

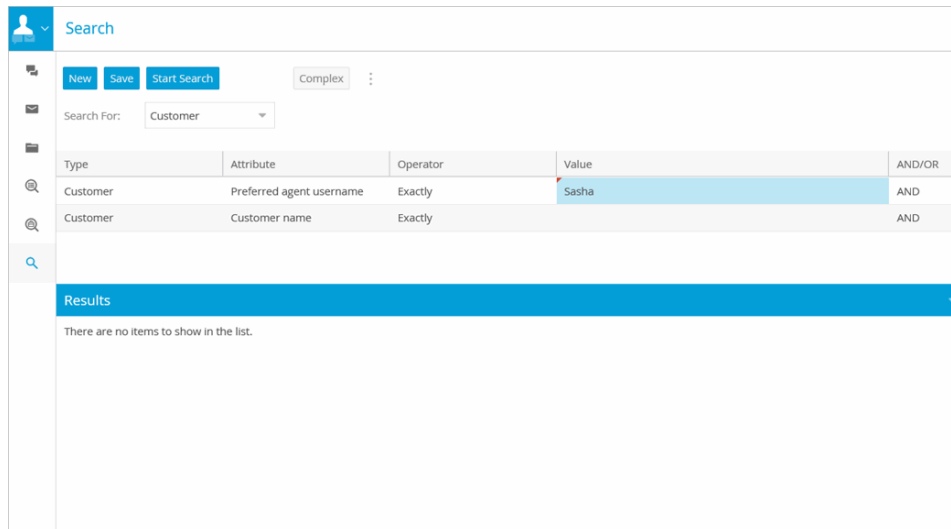
When running a search, you have the option of performing a Simple search or a Complex search. A Simple search conducts a search based on the different criteria that is directly related the search subject, while a Complex search allows you to add multiple criteria as a method of cross-referencing information to find the customer you are looking for.

Running Simple Searches for Customers

To run a simple search for customers:

1. In the Console sidebar, click the **Search** button.
2. From the **Search For** dropdown menu, select **Customers**, **Contact Persons**, or **Contact Points**.

- The Search page refreshes to display the list of attributes available. Input an operator for the search criteria. Operators include: Exactly, Begins with, Contains, Does not contain, Ends with, =, !=, <, <=, >, >=, Between, Not between.
- Input a value for the search criteria. You can search for special characters such as umlaut characters (Ö, ü, ï), : “” etc. If you are using the Exactly operator, you can also use the following special characters (\$ & * ^ % _ () # ") in your search criteria. At least one search criteria is required to perform a search.



Create a new search

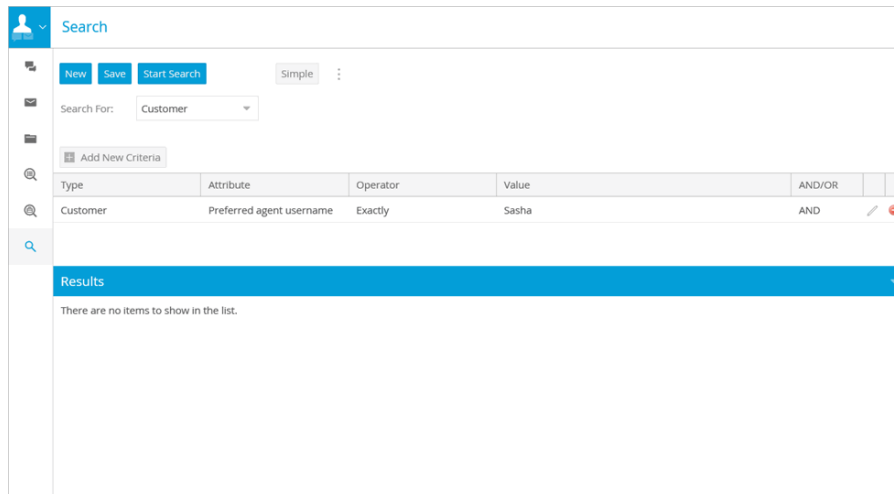
- Click the **Start Search** button.
- Search results are displayed in the Results section. To view more information about the customer, click the object hyperlink. You can export the search results to a .csv format by clicking the **Export** button. You can also print your search results by clicking the **Print** button and using the browser’s print options.

Running Complex Searches for Customers

To run a complex search for customers:

- In the console sidebar, click the **Search** button.
- From the **Search For** dropdown menu, select **Customers, Contact Persons, or Contact Points**.
- Click the **Complex** button. The page refreshes.
- Click the **Add New Criteria** button.
- The Options window opens. From the **Type** dropdown, select the object type for the search criteria.
- From the **Attribute** dropdown, select one of the available attributes. This list changes based on the type you selected.
- Select an operator from the **Operator** dropdown. Operators include: Exactly, Begins with, Contains, Does not contain, Ends with, =, !=, <, <=, >, >=, Between, Not between.

8. Input a value. The inputs for this field change based on the attribute and operator you selected. You can search using special characters such as umlaut characters (Ö, ü, ï), : “” etc. If you are using the Exactly operator, you can also use the following special characters (\$ & * ^ % _ () # ") in your search criteria.
9. Select **AND** or **OR** from the **Boolean** dropdown.
10. Click **OK** to close the Options window.
11. Repeat the process to add more search criteria as necessary. At least one search criteria is required to perform a search. You can edit your criteria by clicking the **Edit** icon. You can delete the criteria by click the **Delete** icon. When you have added all your necessary search criteria, click the **Start Search** button.




Add search criteria to the complex search as needed.

12. Search results are displayed in the Results section. To view more information about the customer, click the object hyperlink. You can export the search results to a .csv format by clicking the **Export** button. You can also print your search results by clicking the **Print** button and using the browser's print options.


Changing Customer Details

Details of a customer can be changed in the Agent Console at any time. Reasons to do so may include changes in the customer's home address or phone number, or updates to their occupational or marital status.

To change the customer details:

1. With an activity selected, click the **Customer**  button.

2. In the Customer Details section, click the **Edit Details** button.

Customer Details	Customer History
First Name	<input type="text" value="Mike"/>
Middle Name	<input type="text"/>
Last Name	<input type="text" value="Ike"/>
Job Title	<input type="text"/>
Date Of Birth	<input type="text" value="07/12/1988"/> 
Gender	<input type="text" value="Male"/> ▼
Marital Status	<input type="text"/> ▼
Employment Status	<input type="text" value="Full-time"/> ▼
Level	<input type="text"/> ▼
ID Type	<input type="text"/> ▼
ID Value	<input type="text"/>


Update customer details

3. Update the customer's information.
4. Click the **Save** button.

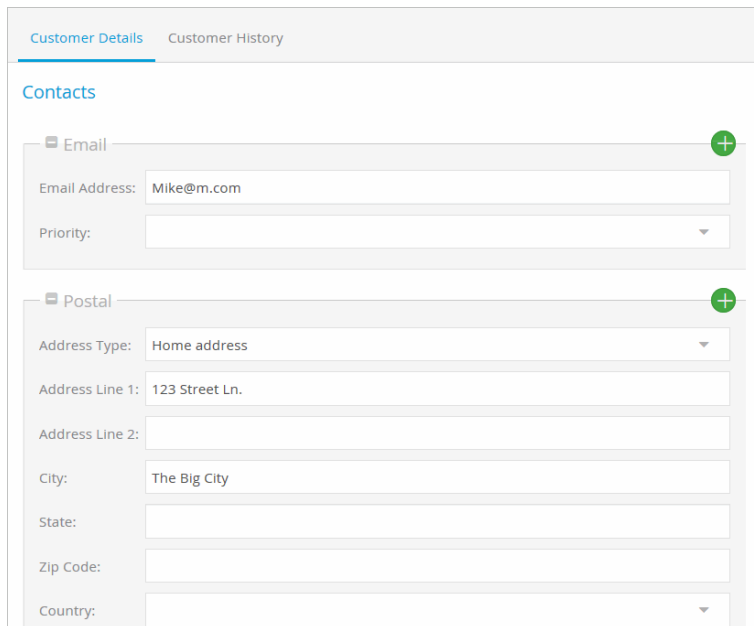
Changing Contact Details of Customers

A customer's contact details may change over time. The Agent Console allows you to update each customer's contact details to reflect changes in their preferred method of contact.

To change the contact details of a customer:

1. With an activity selected, click the **Customer**  button.

2. In the Customer Details page, click the **Edit Details** button.



The screenshot shows the 'Customer Details' page with two contact sections. The 'Email' section has a 'Collapse' button (minus sign) on the left and a 'New Contact Point' button (plus sign) on the right. It contains an 'Email Address' field with 'Mike@m.com' and a 'Priority' dropdown menu. The 'Postal' section also has a 'Collapse' button on the left and a 'New Contact Point' button on the right. It contains fields for 'Address Type' (set to 'Home address'), 'Address Line 1' (set to '123 Street Ln.'), 'Address Line 2', 'City' (set to 'The Big City'), 'State', 'Zip Code', and 'Country'.


View contact details of a customer


3. Scroll to the Contacts section of the Customer Details page. Locate the desired contact information and make your changes.

Note: changing an email address in the contact information only modifies the customer details. The **To** address associated with an activity is not updated. To change the **To** address, see [“Email Address and Subject” on page 38.](#)

4. Click the **Save** button.


To create a new contact point:

1. In the Customer Details page, click the **Edit Details** button.
2. Scroll to the desired type of contact, such as telephone, and click the **New Contact Point**  button. This generates a contact point of that type.

Each new section is added to the bottom of the page. If you need to collapse the fields to make the page easier to view, click the **Collapse**  button.


3. Provide the new contact details of the customer.
4. Click the **Save** button.

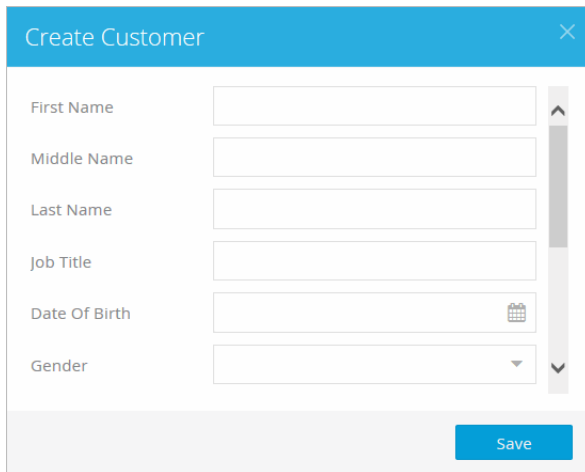
To delete a contact point:

1. If a contact point you have added is incorrect, you can immediately edit the information, or while on the Customer Details page, click the **Delete**  button to remove it.
2. In the window that appears, click **Yes**.

Creating Customers

To create a customer:

1. In the Console toolbar, go to the **Create Customer**  icon.
2. In the Create Customer dialog window, enter the customer's information.
3. Click the **Save** button.




Create new customer

4. The new customer profile is automatically displayed in the Console. Click the **Edit Details** button to continue adding information.
5. Provide the details of the customer, including contact information.
6. Click the **Save** button.

Adding Notes to Customers

Notes are a collaborative tool for agents and supervisors. Meant for internal use, notes are used to share tips and information with other agents or supervisors. Other users can then view these previous notes, as well as add their own.

To add a note to a customer:


1. In the Notes section of the Customer Details page, click the **Add**  button.
2. Enter your note in the text area.
3. When your note is complete, click the **Add Notes** button.
4. Click the **Delete** button next to the note to remove it from the activity.

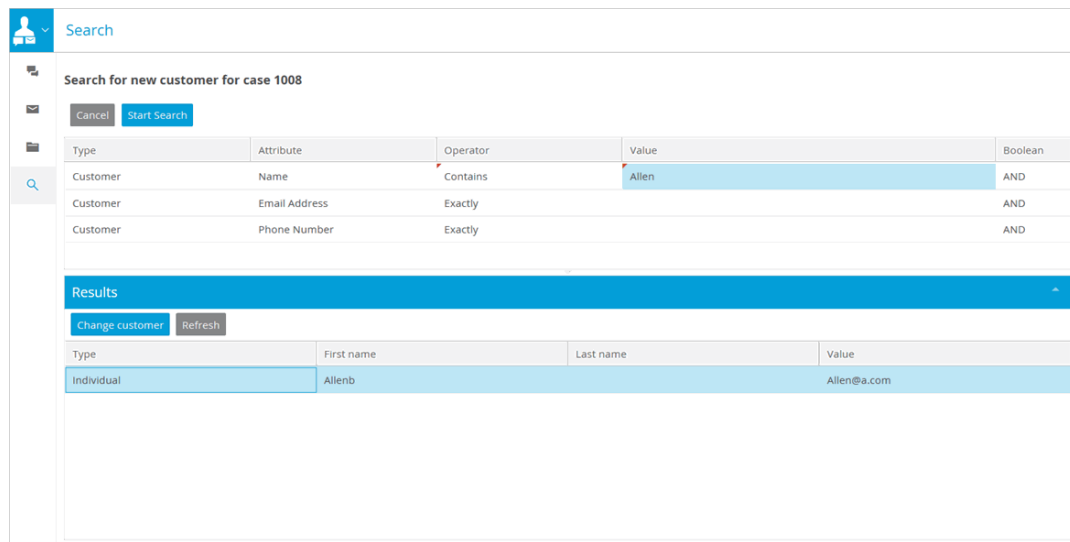


Important: You can add notes to customers while working on an associated activity or via customer search.

Changing Customers

To change the customer associated with an activity:

1. Navigate to the activity to which you wish to reassign the customer.
2. In the Information Bar, click the **Customer**  button.
3. In the Customer Details page, click **Change**. This button is disabled for closed cases and completed activities.
4. In the search for new customer page, conduct a search for the customer you want to associate with the activity. For details about search, see [“Searching for Customers” on page 90](#).



Type	Attribute	Operator	Value	Boolean
Customer	Name	Contains	Allen	AND
Customer	Email Address	Exactly		AND
Customer	Phone Number	Exactly		AND

Type	First name	Last name	Value
Individual	Allenb		Allen@a.com

Select the new customer for the activity

5. In the Results section, select the customer and click the **Change Customer** button.
6. A window appears asking you to select a new contact point for the activity. Choose the desired contact point and click **Change Contact Point**.

When a customer contact point is changed, the original contact point still appears in the inbox. Contact points for activities appear in the inbox with an asterisk (*) next to it to indicate that the contact point has been changed. This ensures activities can be found at both the original contact point and the new contact points. This prevents activities associated with either the new or old contact points from becoming lost.

Merging Customers

Customers can contact support through a variety of different communication channels. They can also provide information in varying degrees and certainty. As a result, it is quite common for there to be multiple entries for the same customer in a system.

For example, a customer named Meghan may contact support about a return she would like to make through the chat channel and provide her primary email address.

1. First, the advisor takes down her information and helps her resolve the issue.
2. A few days later, Meghan contacts support again about an order she placed to see if she can change the order. However, this time she contacts support through an alternative email to what she provided during the chat. It is the same customer, but the contact information is different.
3. The next time Meghan contacts support, it's through the phone. She tells the advisor her name, but the advisor spells her name "Megan" in the call log instead.

With this many contact points for the same person, it is quite possible that Meghan has three different customer entries in the company's database.


To help facilitate the management of extensive customer records, advisors can merge customers in the application. Merging allows advisors to take the information of multiple separate customers in the application and bring it together into one target customer entry. This enables advisors to eliminate extraneous customer entries, thus reducing the amount of customer management required.

When customers are merged into one target customer, conflicting information is overwritten. Therefore, it is important to remember that merging customer is a permanent action and cannot be undone. Once the customer entries are merged, the customer information that was not chosen to carry over is discarded. Once the entries have been merged, advisors can begin adding any customer details that may still be pertinent, such as alternative email addresses.

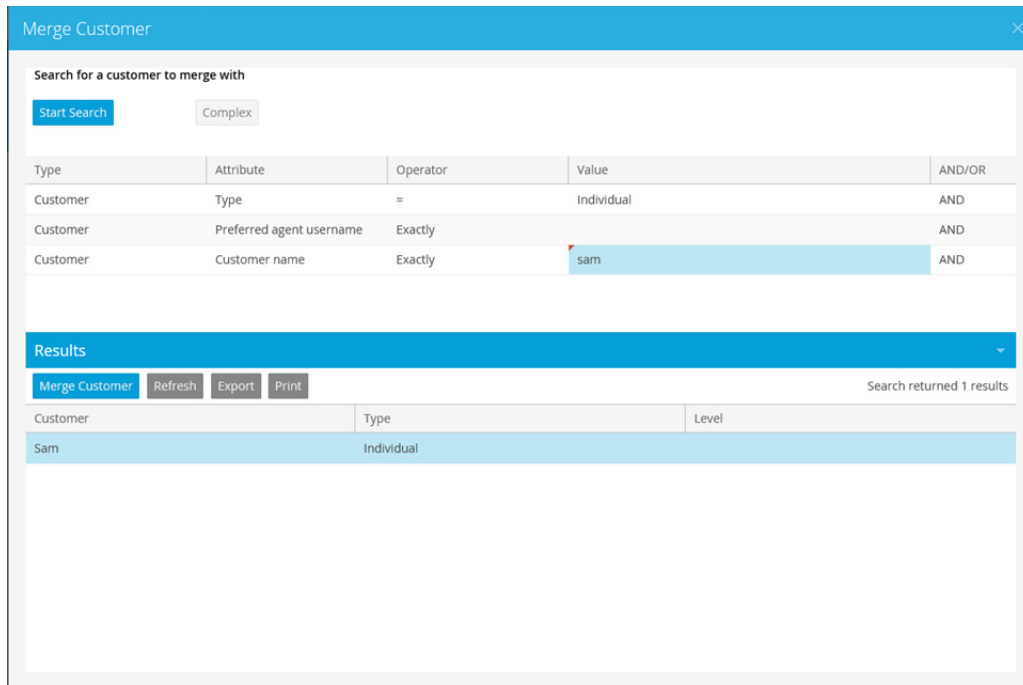
Important things to note about merging customers:

- ▶ The customers you are merging must already exist in the application. New customers that have not been saved cannot be merged. For more information about new customers, see ["Creating Customers" on page 95](#).
- ▶ The customers you are merging must have no activities locked by other users in the application.
- ▶ Customers cannot be merged if they have open activities in the application that are in a transit state. The activities must be closed or have the following statuses: "in queue waiting to be assigned" or "assigned to a user".

To merge customers:

1. Navigate to the activity to which you wish to merge the customer.
2. In the Information Bar, click the **Customer**  button.
3. In the Customer Details tab, click the **More** button.
4. Select the **Merge** option.
5. In the Merge Customer window, provide search terms to locate the customers with which you want to merge the current customer. The simple options for search terms include:
 - Customer Preferred Agent Username
 - Customer Name

- You can also use the **Complex** button to use alternative methods of searching for customers. For more information, see [“Searching for Customers” on page 90](#).



Provide the search terms necessary to find the other customer

- When you have provided the desired search terms, click **Start Search**.
- From the Results pane, select the customer with whom you want to merge the current customer.
- Click **Merge Customer**. The window refreshes to show the details of the customer records for both customer entries.
- From the customer record, click the radio buttons next to the details that you want to mark as the correct information for the target customer. The information that will be retained appears in the column on the right.
Note that when a customer ID is selected for the target customer, all other customer entries not selected are deleted in the merging process.
- The contact info section displays the contact methods for the customer entries that have already been provided. These values are merged into the target customer and none are deleted to ensure there is always an entry in the application for these contact points.

12. Click the **Yes, merge records** checkbox to confirm that you are aware that the action is irreversible and you would like to continue.

Merge Customer

Customer Record
Select which customer record and related information to retain.

Customer ID 1070 1069

First name Dave Sam

Merged record 1070
Dave

Contact Info
All contact information is merged and retained.

sd@ave.org S@amukay.com sd@ave.org S@amukay.com

This action is irreversible. Would you like to continue?
 Yes, merge records.

Cancel Merge

Select the details for the target customer and click Merge.

13. Click the **Merge** button. The details are merged into the target customer.

Deleting Customers

If extraneous customers have been created in the system at some point that cannot be merged with existing customers, you can still tidy up the system by deleting the extra customers. However, note that customers can only be deleted if the activities they're associated with have been closed or they are not associated with any activities. You cannot delete customers attached to an open chat activity.

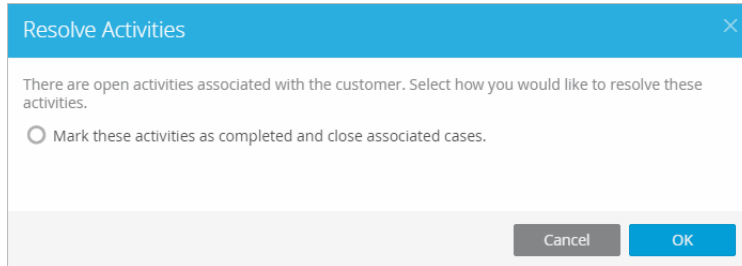
To delete a customer:

1. Locate the customer you wish to delete.
2. In the Customer Details page, click the **Delete** button.



Important: A customer associated with an open chat activity cannot be deleted.

3. A message appears asking you to confirm the deletion. This message varies based on if the customer is attached to an activity, the type of activity, if the activity is open or closed.
 - If you are deleting a customer who is not attached to an activity, click the **Yes** button.
 - If you are deleting a customer from a closed activity, click the **Yes** button.
 - If you are deleting a customer from an open email activity, click the **Yes** button and then select **Mark these activities as completed and close the associated cases**. This completes the activity, closes its case, and deletes the customer associated with it.



Select an option before deleting the customer

4. Click **OK**.

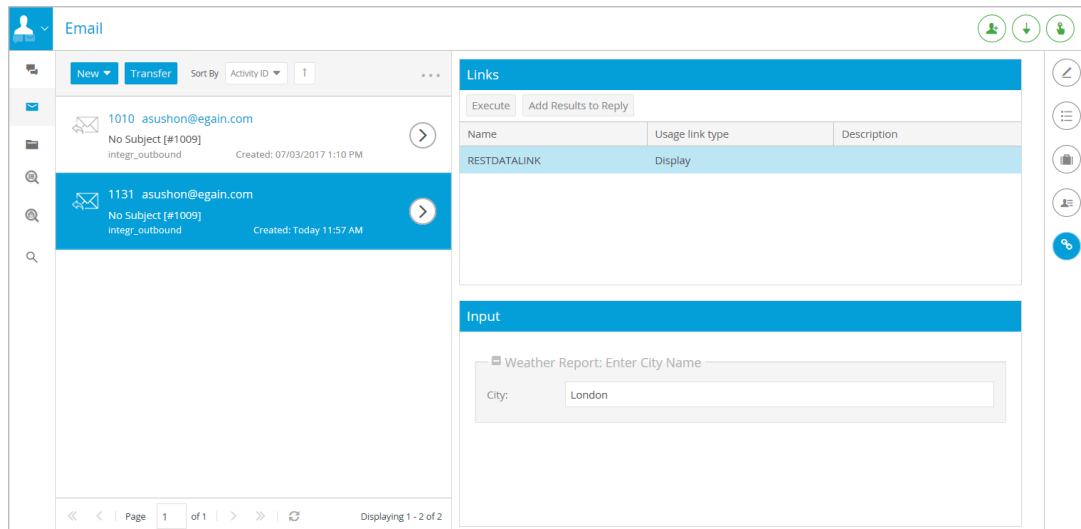


Data Links

- ▶ [About Data Links](#)
- ▶ [Executing Data Links](#)
- ▶ [Adding Results to a Reply](#)

About Data Links

Data links allow agents to access external resources and REST APIs to gather more information that may be pertinent to a customer inquiry. With this additional information at their disposal, agents are better equipped to handle activities.




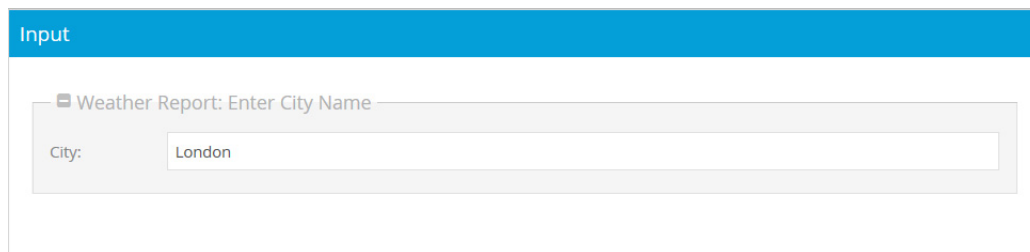
Data links are accessed from the Information bar

The types of data links that are available depend on how your deployment has been configured. Consult your administrator for more information.

Executing Data Links

To execute a data link:

1. While working on an activity, click the **Links**  button in the information bar.
2. In the Links pane, select a data link from the list. The list displays the name, the link type, and a description of the link.
3. If the link has a variable that requires and input from you, enter the value in the Input field. For example, a weather report data link may require you to enter a city name for a more accurate result.



Provide the input value

4. With the desired link selected, click the **Execute** button.

Adding Results to a Reply

To add the results of a data link to a reply:

1. Execute a data link while working on an activity. For details, see [“Executing Data Links” on page 102](#).
2. Click the **Add Results to Reply** button. The data link results are added to the reply pane of the chat or email.