

Microsoft Dynamics CRM

MS Dynamics CRM Omnichannel Flinders University

Domestic Recruitment Live Chat for the Agent

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Overview

Live Chat and Omnichannel for Customer Service

MS Dynamics Live Chat enables a Student to digitally message Flinders University Staff (referred to as Agents) via a Chat Widget on selected Flinders University web pages. The Chats are received as conversations in the Omnichannel which is accessed in MS Dynamics CRM by the Agent.

Live Chat has the following abilities for Agent and Student

- Ability to engage with Students via a Live Chat channel.
- Ability to assign Agent/Staff to respond to student Chat sessions.
- Ability to use quick response to Frequently Asked Questions.
- Ability to associate Chat sessions to student Contact records.
- Ability to create Contact records where Contact records do not exist.
- Ability to create Cases against Contact records.
- Ability to allow Students to download Chat transcript.
- Ability to send attachment/s to student via Live Chat window.
- Ability to restrict students from sending attachment/s via Live Chat window.

Webpages with a Chat Widget

The Student can see the Chat widgets in the following web page and this is where they chat with the Agent: <u>www.Flinders.edu.au/study</u>

The Student will see the following icon



Operating Hours

The Domestic widget will be available to the Student Monday to Friday, 9:00am-4:45pm (excluding public holidays).

Agent working in Omnichannel

The term Agent is synonymous with Staff.

The Agent will see the Chat request in the top right hand corner of the Omnichannel screen, similar to below **OR** will appear as a Desktop notification pop up if Ominichannel is not the active screen. Refer to **Windows Settings for Notifications** on Page 21. As of November, 2020 a **Sound Notification** can be configured when Chat is assigned to the Agent. Refer to **Conversation Chimes – Sound Notifications when Chat is assigned** to the Agent on Page 23. After Accepting the incoming Chat popup, a conversation between Agent and Student begins. The name is displayed if the First name, Last name and Email address match a CRM Contact Record. Otherwise **Visitor 1** is displayed.

Chat request from Diana Prince	Chat request from Visitor 1	
Comment Incoming conversation Wait time 114 sec	CommentIncoming conversationWait time110 sec	
Accept Reject	Accept Reject	

Wait time

If the Agent does not Accept or Reject the chat within 5 minutes the Chat is timed out and deemed as rejected by the Agent. If the Agent is at full capacity, the incoming chat session request will automatically be routed to the next available agent. If no Agents are available to chat, the request will wait in the queue for the next Agent to become available.

The Agent should Accept or Reject instead of ignoring it.

Agent Capacity

Live Chat works on Agent capacity; not on picking up or assigning chat sessions to Staff. This means that an Agent has capacity to work on 5 chat sessions simultaneously. Each time a chat session is finished a new chat session will pop up (incoming) to fill their capacity back to 5. This avoids the need to manage work assignment and is the usual way Live Chat works in CRM. At present the number of Chats allocated to each Agent is 5.

Quick Replies

A database of quick response to the Student has been created and these can be accessed by clicking on the Send quick replies icon at the bottom of the Chat window as circled below or typing /q (include a space) and scrolling down and clicking on a response or, for example, /q covid will display all quick replies with covid in the quick reply list. Click on the correct one to select and click the Send arrow pointing to the right to send.

A list of Keyboard Commands are on Page 27.



Overview of what the Student can see and do

1. To initiate a chat session the Student will click on the widget, as shown below. <u>https://stage.flinders.edu.au/study</u>



 The Chat with us about your study options form will be displayed. The student will Complete the mandatory fields - Your Name and Email Address fields and click Submit.

Q Chat with us about your study options
Please answer below questions.
* Full Name
* Email
How can we help?
Fields marked with * are mandatory.
Submit

3. The following screens will be displayed in the order below. The first name of the Agent is displayed when the chat has been Accepted.

-	Q Chat with us about your study options	Q Chat with us about your study options
	×	– ×
Welcome to live chat support!		
Loading	An agent will be with you in a moment.	An agent will be with you in a moment. Emina has joined the conversation. ••• Emina is typing
	🛙 Type your message 🏼 🏱	🕅 Type your message 🏼 🏱

4. The Student will type information adjacent to **Type to your message** and click the **Send** arrow to the right to send.

Download Chat Transcript

5. Click the **arrow pointing down** (download chat transcript) at the bottom of the chat window.



6. The **ChatTranscripts.html** file is located in the bottom left of the screen, depending upon the browser being used, and can be clicked to open.

e	ChatTranscripts	(1).html	

Email Chat Transcript

7. Click the **envelope** (email transcript) at the bottom of the chat window.



8. Complete the email address in the field as shown below and click **Send**.

Email this o	hat transcript
This will be se	t after your chat ends.
Send	Cancel

End the Chat

- 9. The Student can end the chat themselves by clicking the X in the top right hand corner of the Chat window. The following message is displayed and **Close** is clicked.
- Note: The Agent also needs to click End at the top of the Communication Panel.

Q Chat with us about your s	study options
	- ×
An agent will be with you in a moment.	
Emina has joined the conversation.	
EM What topic can I help you with	?
Want a copy of this of Select Cancel and then sel download or email ico Close Cance EM Em	chat? lect the on.
	thank you.
	15:23:58 - Sent
Type your message	

Live Chat for the Agent in Omnichannel Overview of the Omnichannel Agent Dashboard

- 1. Open MS Dynamics Student CRM.
- 2. Click on Student CRM in the Navigation Menu.



3. The Apps window is displayed. Click on **Omnichannel for Custom...**



4. As of November, 2020 the following information is displayed. This is enabling Live Chat and may not appear every time.

24/11/2020 12:55 PM Wrap-up	~ *		Closed
Connecting to Omnicha	nnel for Customer Service	e 25% - Getting conve	rsation control ready
			24/11/2020 12:021101
24/11/2020 12:55 PM		•	Closed
Wrap-up	<u>^</u>		Closed
Connecting to Omnicha	annel for Customer Servio	ce 63% - Preparing to	receive notifications
/2020 12-55 PM			
2020 12.33 1 1	· · · · · · · · · · · · · · · · · · ·		Closed
up	· ·		Closed
Connecting to Omnic	hannel for Customer S	Service 91% - Gettin	g presences ready

5. The Omnichannel Agent Dashboard is displayed.

 Once logged in, the Agent will start receiving chat sessions from 'Students'. When a Student has initiated a chat session the Agent will see the Incoming Chat notification pop up as below.



Omnichannel Agent Dashboard

- 7. Click Home Home at the top of the Session Panel to display the Omnichannel Agent Dashboard.
- 8. Three columns are displayed in the Omnichannel Agent Dashboard. Each of the columns can be sorted on the field names by clicking on the field name.

Omnichannel Agent Dashboard ∨		
My work items	Open work items	Closed work items
🖄 0 \downarrow Modified On \checkmark	🖄 0 \downarrow Modified On \checkmark	🖄 1 \downarrow Modified On \checkmark

My work items

Chat conversations the Agent is actively working on are displayed.
--

Click on the	(elipses) and click on	🖸 Open	Open to work on the item
--------------	------------------------	--------	--------------------------

Open work items

Chat conversations which are Open are displayed.

Click on the (elipses) and click on **Assign to me** work on the item. This starts the session with the Student and moves the Chat conversation in to the Agent's My work items.

Wrap-up

Refer to Wrap up on Page 11 for an explanation.

Closed work items

Chat conversations the Agent has closed in the past 24 hours are displayed. Click on the

(elipses) and click on **Open** to view the details of the Chat.

Status Indicator (Presence)

The Status indicator is located in the Navigation Menu, right hand side of the screen and explained below.



Offline



The Agent is not logged into the Omnichannel.

Appear away



The Agent is not available.

Do not disturb



The Agent does not want to be disturbed.

Busy

A Chat cannot be allocated to the Agent's queue.

Available



A Chat can be allocated to the Agent's queue.

Timers and Sound Notification

The Timer in the incoming Chat request indicates how long the incoming Chat has been waiting in the queue. If the sound notification is turned on a sound will be played.



Accept or Reject a Chat

Accept

Clicking on Accept will accept the Chat with the Student.

Reject

Clicking on **Reject** should place the Chat in the queue of another Agent,

Chat Conversation Status in OmniChannel

There are five types of Chat conversation states which are described below:

Open

A Chat which is in the queue (Work items) but not assigned to you, the Agent is classified as **Open**.

A Chat is also classified as Open when:

- An Agent disconnects the Chat but does not reconnect within the time-out limit;
- When the Agent rejects a chat;
- When the Chat is transferred to another queue.

Active

When an Agent accepts a Chat it is classified as **Active**.

Wrap up

Wrap-up is the state between ending the Conversation and moving it into **Closed** State. During **Wrap-up**, located in the My work items panel, the Agent can complete 'after Chat' activities, for example Linking the Conversation to the Contact Record or creating a Case. The Agent's Status Indicator appears **Busy** during this time.

- When an Agent clicks End on the Chat with the Student it is classified as Wrap-up.
- When the Student ends the Chat by clicking the **X** it is classified as **Wrap-up**.
- When Wrap-up is completed the agent needs X adjacent to the Student's name in the Navigation Pane. The Chat then moves from Wrap up to Closed and therefore from My work items to Closed work items.

=		—
û Home	Diana Prince Š 01:11	End
DP Diana Prince		
	=	
	命 Home	
	Diana Prince	

• Note that the following prompt may be displayed when clicking the **X** adjacent to the Contact name. Click **Close**.



• Any Chats in My Work items can be opened and completed.



Waiting

If the Agent navigates away from the Chat **without** selecting End and the Student is still active in Chat, the Chat is classified as **Waiting**. For example, if the Agent is waiting for information from the Student and does not want to end the Chat. The Agent appears as available.

Closed

The Student or Agent ends the Chat. The Agent clicks the **X** to the right of the name in the Session Panel. This is classified as **Closed**.

When the Chat is closed it cannot be reactivated or reopened again.

An overview of the Customer Summary

- When a Chat is accepted by the Agent the Pre-Chat Summary is always displayed in the Conversation summary pane.
- If the First name, Last Name and Email address entered in the **Pre-Chat Summary** match an **existing** Contact Record, the name of the Contact is displayed adjacent to the Details, Search customer field and as well as some Contact details.

If a Customer Summary Page is not displayed, the Search **issue field** enables a search of CRM Contact Records using the Full Name or Email Address completed in the Pre-chat summary.

- Recent Cases are displayed.
- The Contact Timeline including linked Chat Conversations or Chat Notes.
 New Conversation

conversation \cdot Customer summary $ imes$				
Details				
Search customer 🕅 Diana Prince	Search issue	Lin	ked records Contact	
Contact Diana Prince	。 Search for or create a new	issue, and link	eline Search timeline	+ 7 :
2 ☑ diana.prince@flinders.edu.au ☑ Any	+ New Case	Enter	Conversation from Diana Prince: Domesti	n Wendy James c Recruitment 4:48
Conversation summary Pre-chat survey Visitor details Full Name Diana Prince	Class Registration CAS-31156-Z1V7Y8 Phone Changing subjects CAS-12817-D1T0C3 Web			
diana.prince@flinders.edu.au	onversation summary Pre-chat survey Visitor details			
	Full Name Diana Prince Email diana.prince@flinders.edu.au			
	How can we help? Hello, Where are the printers, p	ease?		
	Conversation details Engagement channel Live Ch	at		
	Waiting time 1 mins	12 secs		
	Queue Domes	tic Recruitment C		
	Start time 23/04/	2020 4:47 PM		

Search for a Contact Record

If the First Name, Last Name and Email address entered in the Pre-Chat Summary do not match a CRM Contact, the Customer (Contact) Summary pane will not be populated. Before creating a new Contact Record, request the **FAN** or **Student ID** and then search the CRM Contact Records using the information provided to ensure a duplicate Contact Record is not created.

1. Rest the mouse under **New Conversation**, **Details**, adjacent to Search customer. The prompt **Look for Records** is displayed. Click on Look for Records.

	-	Customer Summary	Knowledge article +
🔂 Home 🏹 Visitor 1 💆 🖉 55:09	End	\leftarrow	
Visitor 1		New Conversation	
DP Dianne Prince		Conversation Customer sumn	nary 🔪
		Details	
Two Chats are in progress with Agent.		Search customer	
The blue line adjacent to Visitor 1 indicates this is the Chat and details		Search for or c	R reate a new customer, and link
currently displayed.	Wendy James, 2:27 PM		

2. Type the FAN, Student ID, full name of the Student OR Email address and click to select from the list.

The Contact Record is displayed with the Chat still on the left hand side of the screen under the **Omnichannel** tab; the Contact details under the **Customer Summary** tab. The name of the student (in this case Visitor 1) is displayed on the left hand side of the screen.

Linking the Chat conversation to the Contact's Record

The Chat conversation is automatically linked to the Contact's record. The Chat conversation is displayed in the Contact Record Timeline but is **Active** and unable to be opened until the Conversation has moved into the Closed work state. The Conversation is then Completed and can be opened by clicking on the Open Record icon.

Unlink the Chat conversation and change to another Contact's Record if needed

Refer to Business Processes as this will need to be resolved by logging a ServiceOne ticket.

When it is necessary to create a New Contact Record

Business Processes need to be followed before creating a new Contact Record.

It is necessary to create a new Contact record when the Student initiating the Chat does not have a CRM Contact Record. This can be confirmed searching for the Full Name and Email address the Student entered in the Chat. If the Contact Record does not exist a new Contact Record can be created. Refer to **An overview of the Customer Summary** on page 13.

Create a new Contact Record

This is using the existing CRM Contact form.

- 1. Search for the Contact as per to An overview of the Customer Summary on page 13.
- 2. Do not select a Contact Record.
- 3. Click on + New Contact and complete the details.

New Conversation Conversation · Customer summary ~			
Details			
Search customer	dianne prince	٩	
	No records found. Create a new record.		
	+ New Record	Change View	
	Search for or create a new	customer, and link	
	+ New Organisa	+ New Contact	

4. A new tab with the Contact Details is displayed the top of the screen. This can be closed by clicking the **X** to the right hand side of the tab name.



Create a new Case for the Contact

This is using the existing CRM Case form.

- 1. Click on + New Case.
- 2. Complete the details as per your Business Processes.



3. A new tab with the Contact Details is displayed the top of the screen. This can be closed by clicking the X to the right hand side of the tab name.

Customer Summary	Knowledge article	Dianne Prince		\times
🔶 🔚 Save 💕	Save & Close + Ne	ew 🗋 Deactivate	°§ Co	nnect

Consult another Agent /c

Consulting with another Agent on your team

Very Important Note

If the conversation is NOT to be displayed to the Student in the Chat conversation, type /i (include a space) or click on Internal at the bottom of the Chat window. The conversation will be on an orange background.

If left on Public the Student will see all of the conversation.



Domestic Recruitment Live Chat for the Agent

1. At the bottom of the Chat window, click on the **P** Initiate consult with other agents or supervisors icon, as circled below or type /c (include a space). The following Consult window is displayed.

·	\$		····	
Consult			×	
	Loading			
				Indicates it is a
/< □ 2 □		Public	► Iternal	Public conversation and the Student will see this in their Chat window.

- 2. Type the first name of your Staff member adjacent to */c* (include a space).
- 3. Click on their name in the list of names displayed. The message **Consult with 'Agent'** has been initiated is displayed.
- 4. Type **/p (include a space** or click on **Public** to include the Student in the Chat conversation.

Transfer a Chat to another Agent /t

1. Click on the Transfer icon as circled below or type /t (include a space).



- 2. Type and select the name of the Staff member.
- 3. Ensure the Staff member has joined the Chat, indicated by the message in the Student's Chat window: Another Agent has joined the Conversation. Agent's chat window: 'name of Agent' has joined the Conversation.
- 4. Click the **X** adjacent to the Student's name in the Navigation Pane to exit the Chat conversation.

Note: It is also possible to transfer to another Queue by typing /tq (include a space) OR /t (include a space), clicking on Queue and clicking to select the Queue.

View previous chat session transcripts

The Chat conversations can be viewed:

1. If still displayed in the **Omnichannel Agent Dashboard**, any of the three columns

(**My work items**, **Open work items**, **Closed work items**, Click on the (elipses) and click on **Open** to work on the item.

Click the Go back arrow in the top left hand corner of the menu bar to return to the Omnichannel Dashboard.



2. From the Contact Record Timeline, after the Conversation has been closed.

Send/Upload a File to the Student

Very Important Note

Once the file has been selected and Open clicked it is AUTOMATICALLY uploaded. There is NOT a confirmation step involved.

1. Click on the elipses and click on Attach File. The Open window is displayed.



- 2. Locate the file to be attached and click to select.
- 3. Click on **Open** in the bottom right hand corner of the Open window. **THE FILE IS IMMEDIATELY UPLOADED**.

Sending a URL to Student

1. Click in the message area, type the web address and click the \triangleright Send arrow on the right hand side to send.

Take Notes Specific to the Chat

The Note cannot be added if the Person involved in the Chat conversation does not have a Contact Record. Refer to **Create a new Contact** Record on Page 15

1. Click on the **Note** icon in the Communication Panel. Type the information.



2. The Add note column will be displayed on the screen.

Add note	×
Dianne is a keen user of the Library and likes to borrow books	
Add note	Cancel

3. Click **Add note** . The Note will be added to the Contact Record Timeline.

Display the Flinders Student CRM

1. Click on **Omnichannel for Customer Service** in the Navigation Menu.

2. The Apps window is displayed. Click on Student CRM.

lir	nders Omnichannel f
Ар	ps
	Detault Publisher for orgf
	UNIFIED INTERFACE
	 Student CRM
	Provides access to

3. The following prompt is displayed. Click on Leave.

Changes that you made may not be saved.		
	Leave	Cancel

Windows Settings for Notifications

When Omnichannel is open but not the 'active screen', the Chat request will appear as a Desktop notification, similar to below. This notification depends upon these Windows settings.



- 1. Click on the **Windows Start** button in the bottom left hand corner of the screen. The Start menu pops up.
- 2. Click on the **Settings** icon.



3. The **Windows Setting** window is displayed. Click on **System**.

Sr.



4. The **Settings** window is displayed.

Notifications & actions

5. Click on Notifications & actions in the System menu, left hand side of the screen.

ŝ	Home
Fi	nd a setting $ ho$
Syst	em
Ţ	Display
	Notifications & actions
Ċ	Power & sleep

- 6. The **Notifications & actions** information is displayed.
- 7. Ensure the setting for **Notifications**: **Get notifications from apps and other senders** is turned on.

← Settings	
வ் Home	Notifications & actions
Find a setting ρ	Quick actions
System	You can add, remove, or rearrange your quick actions directly in action center.
🖵 Display	Edit your quick actions
다)) Sound	Notifications
Notifications & actions	Catactifications from some and other and on
J Focus assist	On

Focus assist

- 1. Click on Focus assist in the System menu, left hand side of the screen.
- 2. Ensure Off is selected.1

← Settings	
命 Home	Focus assist
Find a setting	Choose which notification you'd like to see and hear so you can stay focused. The rest will go straight to action center where you can see
System	them any time.
🖵 Display	• Off Get all notifications from your apps and contacts.
印》 Sound	O Priority only See only selected notifications from the priority list. The rest will go straight to action center.
Notifications & actions	Customize your priority list
	O Alarms only Hide all notifications, except for alarms.

3. Click the X in the top right hand corner to close the Settings window.

Conversation Chimes – Sound Notifications when Chat is assigned to the

Agent

When a Chat is accepted by or assigned to an Agent a sound can enabled. The instructions below explain how to turn on sound notifications and select a sound.

1. Click the Home Home icon in the Session Panel, left hand side of the Omnichannel Agent Dashboard.



2. Click on the \square Open site map item in a new tab icon in the Application tab panel.

On	Omnichannel for Customer S			Q	Ø	Q		
Omnichannel Agent D Omnichannel +		+						
\leftarrow	🕏 Save As	+ New	\checkmark	√ Set As De	Open site	e map item in a	^{new tab}	All

3. Click on **Personalisation** from the drop down menu.



- 4. The **Sound Settings** tab and information is displayed.
- 5. **Turn on sound notifications** the slider needs to be set to **Yes**. If set to No, click the slider once.

Omnic	hannel Omni	channel Personaliz	at n × H	÷					
(E	🛿 Save 📓 Save 8	& Close 🕐 Refresh	Check Access						
Perso User :	onalization settings								
Perso	nal quick replies	Sound Settings R	ed						
Т	urn on sound notifications	Tes Yes							
Ň	When you're done,	select save and refresh	the browser to app	bly your settings.					Reset to default settings
	Entity Records								
	Play sound	Yes	Sound	🖾 Xylophone ring	Repeat until answered	Yes	Volume	100	
	Live chat								
l	Play sound	Yes	Sound	🐼 Wood bounce	Repeat until answered	Yes	Volume	100	
	Incoming message	ges for open sessions							
	When this is on,	your sound will play wh	en you receive a m	essage in an open live chat or s	ocial channel session.				
	Play sound	Yes	Sound	🖾 Hello			Volume	100	

Change the sound, Live chat group

- 5. Rest the mouse on the current sound and click on the ^D magnifying glass.

 Live chat

 Play sound
 Yes

 Sound
 Wood bounce ×

 Repeat until
 Yes

 Volume
 100
- 6. Click to select from the list. The Sound settings screen is automatically displayed.

\textcircled{W} Wood bounce \times \checkmark				
Aud	dio Files	F	Recent rec	ords
쑸	At the door 14/09/2020 12:05	PM		A
ŝ	Bedtime call 14/09/2020 12:05	5 PM		
ŝ	Bubble pop 14/09/2020 12:05	5 PM		
	Comina up			-
+	New Audio File	0	Change \	View

7. Click Save Save in the top left hand corner of the screen. The following prompt is displayed at the bottom of the screen.



8. Click the X adjacent to Personalisation to close this tab.

Omnichannel for Customer S				
Omnichannel	Omnichannel	Personalization		

Play a sound

- 1. Refer to step 4 on page 24.
- 2. Click on the sound. A new tab is displayed with the name of the sound.
- 3. Click **b** on the play icon to hear the sound.
- 4. Click the Go back arrow in the top left hand corner of the menu bar to return to the to display the Sound Settings.



Explaining the Agent Interface

The main parts of the Agent Interface are as below.

			5 Status in	dicator (Presence)
🖩 Flinder	S Omnichannel for Customer S		م	Ø Q + 7 @ ? (DP)
=	-	Customer Summary Knowledge ar	+ 3 Application	Panel
命 Home	Susan Holton 00:15:04 © Neutral End	Copy URL		allel
Susan Holton	2 Communication	New Conversation Conversation · Customer summary ~ Details	Unified Interface	application area
Session	Panel	Search customer 🛛 🕅 Susan Holton	Search issue	Linked reco Contact
Fanel		Contact Susan Holton	B	Timeline + T I ✓ Search timeline
		Σ	link	Enter a note
	Hello, Are food outlets open at Uni,	≌ susan.holton@flinders.edu.a ☞	+ New Case	Closed 12:56 PM V
	Diease? Customer - 12:56:20		Recent Cases	Closed 19/11/2020 11:1
	Yes - here are some attachments	Conversation summary Pre-chat survey Visitor details	CAS-46554-X3H9H8	Conversation from Wendy Susan Holton: Library
	Sent - 12:56:35	Sent - 12:56:35 Full Name Bus timetable CAS-A4550-V2V0P. Phone	Bus timetable CAS-46550-V2V0P6 Phone	Closed 18/11/2020 2:16 V
	Type your public message	Email	ENIOL No.2 CAS-46549-L3K6V9 Face To Face	 UA1:06540000230 hello me what size and type Closed 12/11/2020 2:03 >
		Open		🗟 Save

1 Session Panel

List of all chat sessions for an Agent.

2 Communication Panel

Where the Agent interacts with the Student. This is hidden until a Chat is accepted. The Communication Panel can be collapsed and displayed at the bottom of the screen by clicking the **Collapsible side panel** icon.

Ũ	•	
	🖪 Susan Holton	
The Communication Pa	nel can be expanded by then clicking	Expand side panel
icon at the bottom of th	e screen	
	🛋 Susan Holton	Tool .

3 Application Panel

Located at the top of the screen beneath the Navigation Menu. At least one tab is not closable and is referred to as an Anchor tab. Clicking the \square sign enables another Dashboard to be opened.

4 Unified Interface application area

Displays the current information for the selected Chat.

Click **Home** in the Session Panel and the work streams My work items; Open work items; Closed work items are displayed (refer to **Omnichannel Agent Dashboard** on Page 9.

5 Status Indicator (Presence)

Change your status which determines if Chats can be received. Refer to **Status Indicator** (**Presence**) on Page 10.

Keyboard Commands

The following keyboard commands can be used instead of selecting the icon at the bottom of the communication panel.

Command	Description	Communication Panel Icon	Keyboard Command (type a space after the letter)
Consult	View the list of available Agents to be able to consult	₽,	/c
Internal	Send a message to only the Agent. The Student will not see this in their Chat conversation.	Internal	/i
Public	The message is sent to the Student in the Chat conversation as well as any Agent who has joined the Chat conversation.	Public	/р
Quick Replies	Displays the list of Quick Replies which have been created by Flinders University's CRM Teams using Live Chat.	~	/q Type a key word to display any Quick Reply with that word Click on the Quick Reply to insert it.
Quick Replies with Tags	Displays the list of Quick Replies which have been created by Flinders University's CRM Teams using Live Chat and grouped by tabs.		/q #Tagname
Transfer to Agent	Type the name of the Agent and click to transfer the Chat conversation	$\stackrel{\longrightarrow}{\leftarrow}$	/t
Transfer to Queue	Type the name of the Queue and click to transfer the Chat conversation		/tq

Version Control

Version Number	Version Date	Changes
0.1	April, 2020	Draft notes
1.0	April, 2020	Notes uploaded to FLO.
2.0	July, 2020	Footer updated as AssystNET has been replaced by Service One. Uploaded to FLO.
3.0	September, 2020	Updated information about Quick Replies on Page 5. Included information about turning the pop ups on if Omnichannel is not the active screen, Windows Settings for Notifications on Page 20. Uploaded to FLO.
4.0	October, 2020	Updated for the Unified User Interface. Uploaded to FLO.
5.0	November, 2020	Updated for the Microsoft November upgrade including: Information displayed when opening Live Chat, step 4 on Page 8. Reference to sound notification on page 10. Prompt when closing a Conversation note on Page 11. Conversation Chimes – Sound Notifications when Chat is assigned to the Agent on Page 21 and Explaining the Agent Interface on Page 24. Uploaded to FLO.
6.0	January, 2021	Updated to reflect minor changes in Live Chat and Windows. Uploaded to FLO.