MS Dynamics CRM Omnichannel Flinders University

Library Live Chat for the Agent

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Version 7.0

Contents

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

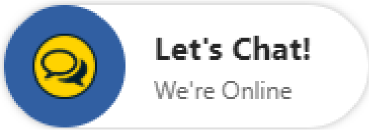
- Ability to chat to Students using Live Chat channel;
- Ability to assign Agent/Staff to respond to Student Chat sessions;
- Ability to use quick response to frequently asked questions;
- Ability to create Contact records where Contact records do not exist;
- Ability to associate a Chat sessions to the Student's Contact record;
- Ability to restrict Students from downloading Chat transcripts;
- Ability to restrict Chat transcript from being visible via Ask Flinders;
- Ability to receive attachment/s from Student via Live Chat window;
- Ability to set auto responses based on chat questions.

Webpages with a Chat Widget

The Student can see the Chat widgets on the following web pages and this is where they can initiate a chat session with a Staff member, referred to as the Agent.

https://libraryflin.flinders.edu.au/	https://libraryflin.flinders.edu.au/about/contact
Main FLO Student Support landing page	FLO Student Support contact page

The Student will see the following icon:



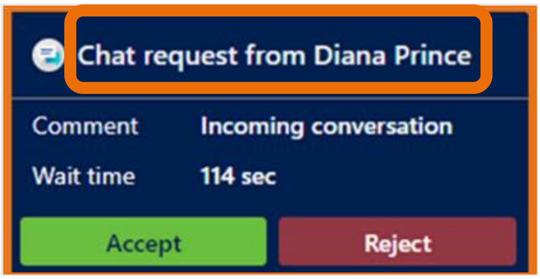
Operating Hours

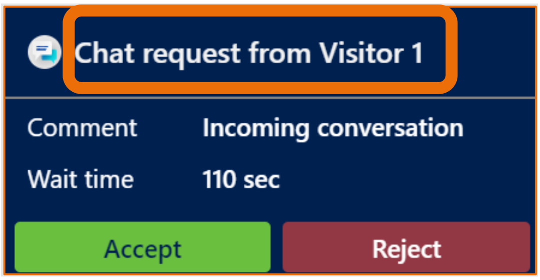
The Library widget will be available to the Student Monday to Friday, 9:00am-4:45pm (excluding public holidays).

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.





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.

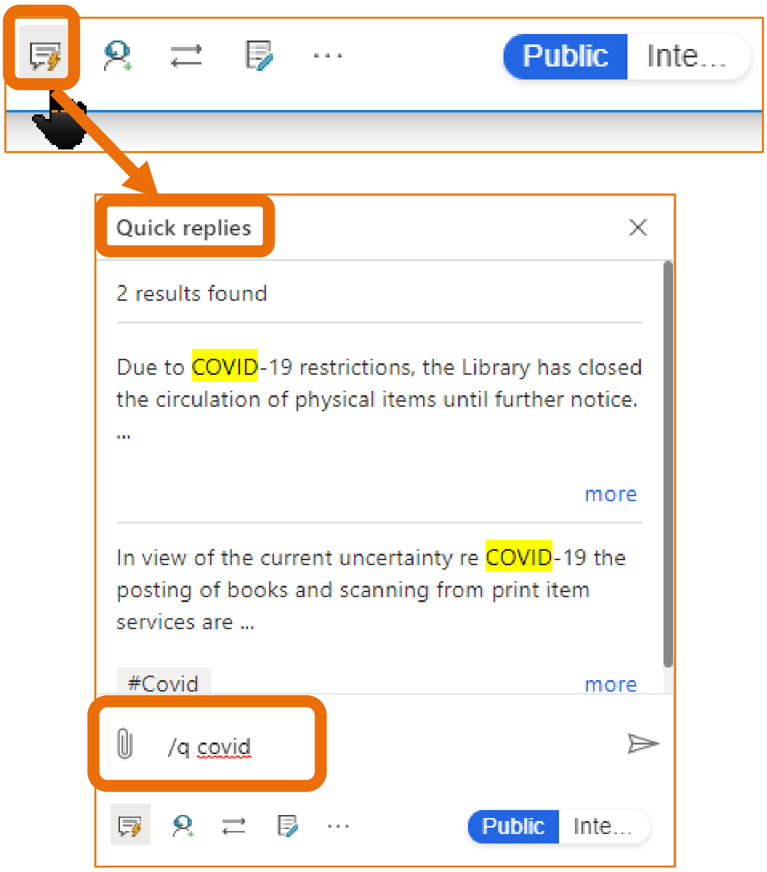
Agent Capacity

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

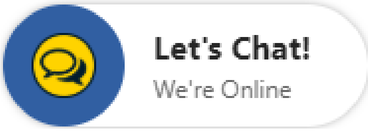
A database of quick response to the Student has been created and these can be accessed by clicking on the **Send quick replies** icon at the bottom of the Chat window as circled below or typing **/q (include a space)** and scrolling down and clicking on a response or, for example, **/q covid** will display 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.

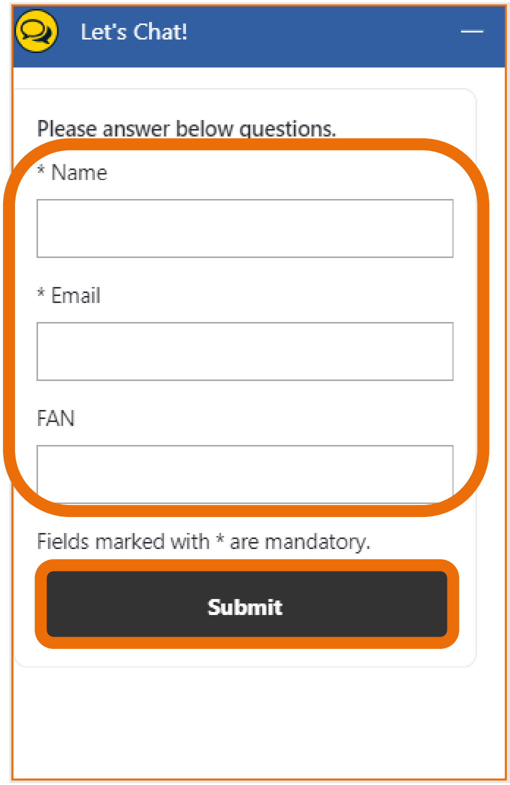


Overview of what the Student can see and do

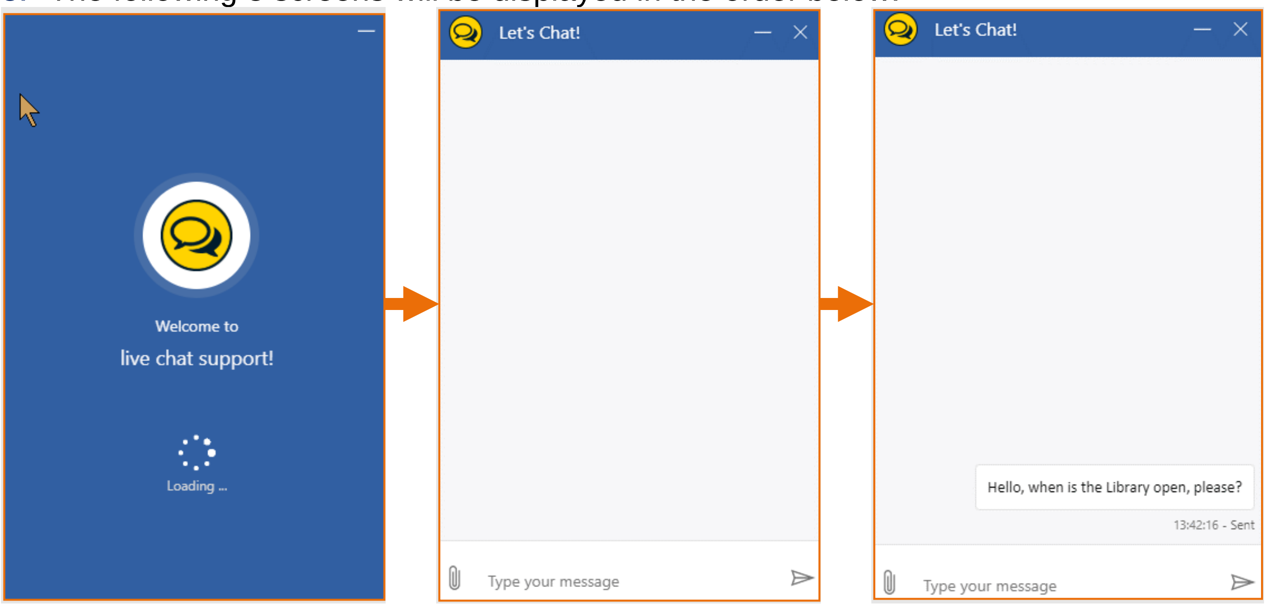
1. To initiate a chat session the Student will click on the widget, as shown below.
   https://library.flinders.edu.au



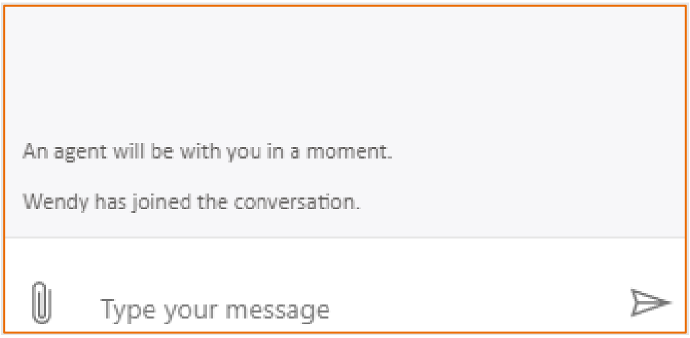
2. The **Let's Chat!** form will be displayed.
   The student will Complete the mandatory fields - **Your Name** and **Email Address** fields and click **Submit**.



3. The following 3 screens will be displayed in the order below.



4. The first name of the Agent is displayed when the chat has been Accepted, as shown below.

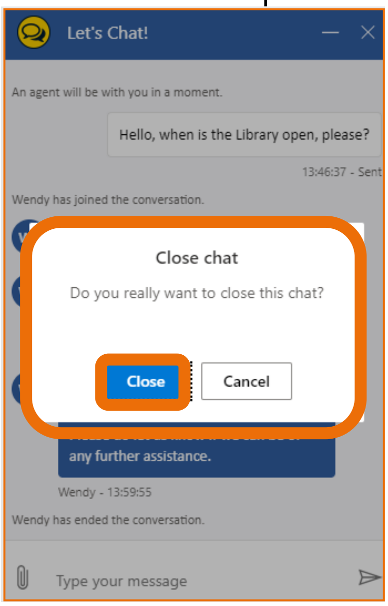


5. The Student will type information adjacent to **Type to your message** and click the  **Send** arrow to the right to send.

End the Chat

6. 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. **Close** is clicked.

Note: The Agent also needs to click **End** at the top of the Communication Panel.

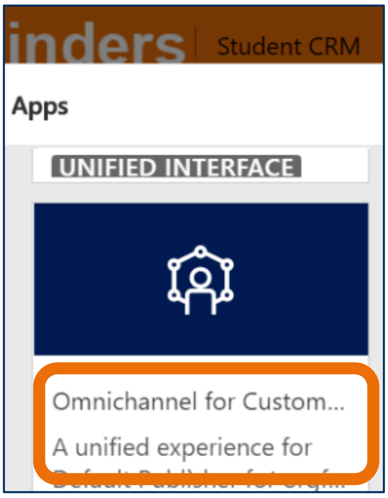


Live Chat for the Agent in Omnichannel

Overview of the Omnichannel Agent Dashboard

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

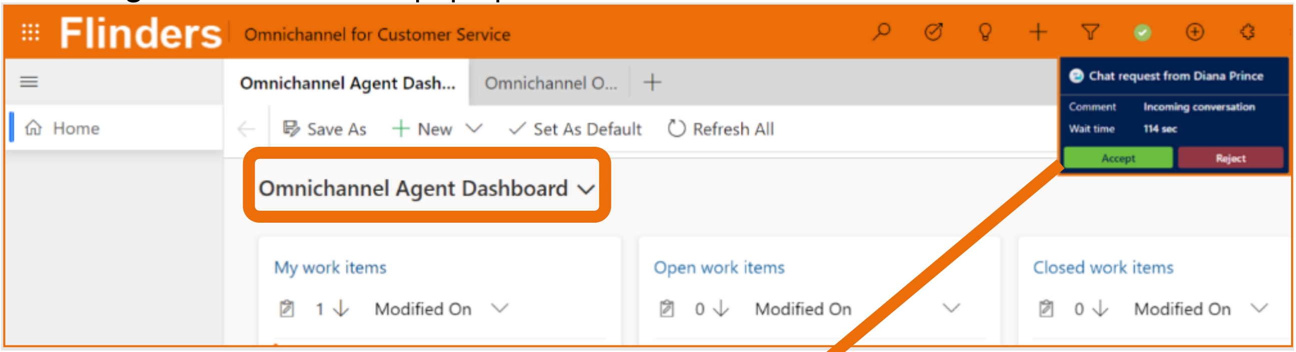
3. The Apps window is displayed. Click on **Omnichannel for Custom….**



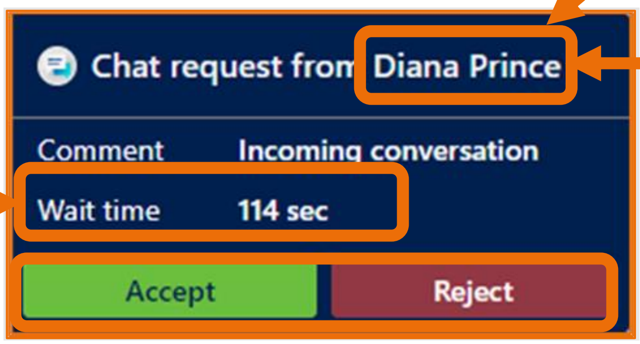
4. As of November, 2020 the following information is displayed. This is enabling Live Chat and may not appear every time.

5. The **Omnichannel Agent Dashboard** is displayed.

6. 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.



Wait time – the Chat will be timed out and deemed ‘rejected’ after 300 seconds (5 minutes). Also, it will go to the next Agent or Queue.

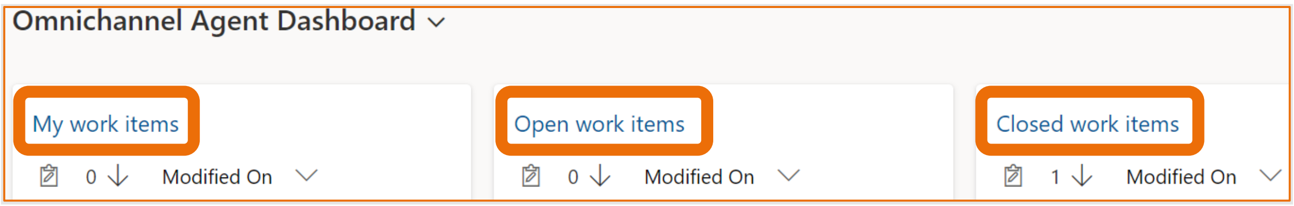


The Agent should **Accept** or **Reject** the Chat.

The name indicates there is a match of First name, Last name **AND** Email Address. If **Visitor 1** is displayed it indicates the person chatting **may** not have entered their information correctly or have a CRM Contact Record. The match is based on the First Name, Last Name **AND** Email address entered and matched with a Contact record.

Omnichannel Agent Dashboard

7. Click **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.



My work items

Chat conversations the Agent is actively working on are displayed.

Click on the (elipses) and click on **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

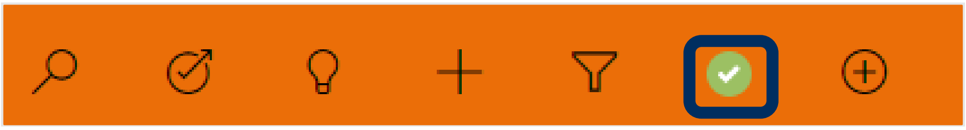
Refer to **Wrap up** on Page 11 for an explanation.

Closed work items

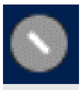
Chat conversations the Agent has closed in the past 24 hours are displayed. Click on the  (elipses) and click on **Open** to view the details of the Chat.

Status Indicator (Presence)

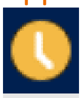
The Status indicator is located in the Navigation Menu, right hand side of the screen and explained below.



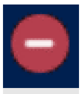
Offline

 The Agent is not logged into the Omnichannel.

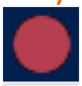
Appear away

 The Agent is not available.

Do not disturb

 The Agent does not want to be disturbed.

Busy

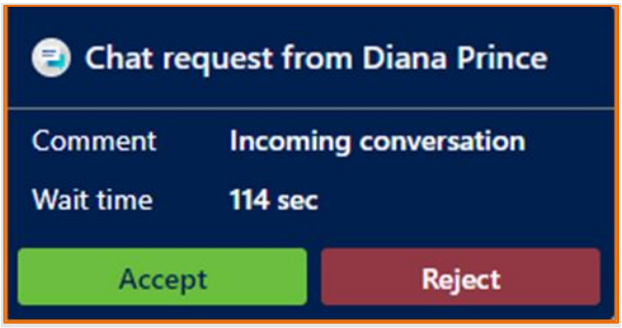
 A Chat cannot be allocated to the Agent's queue.

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 States 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.

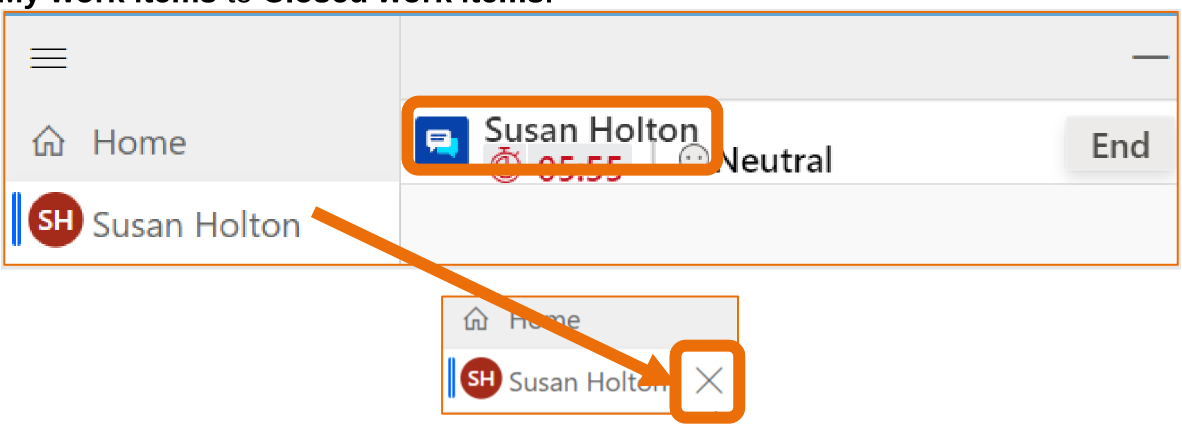
Active

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

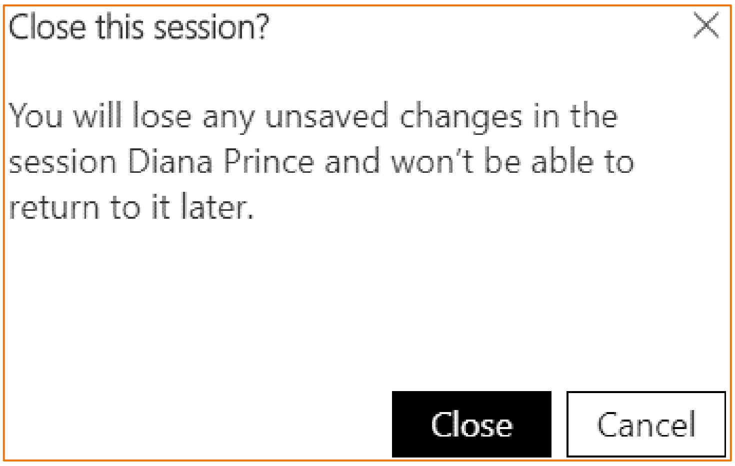
Wrap up

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.

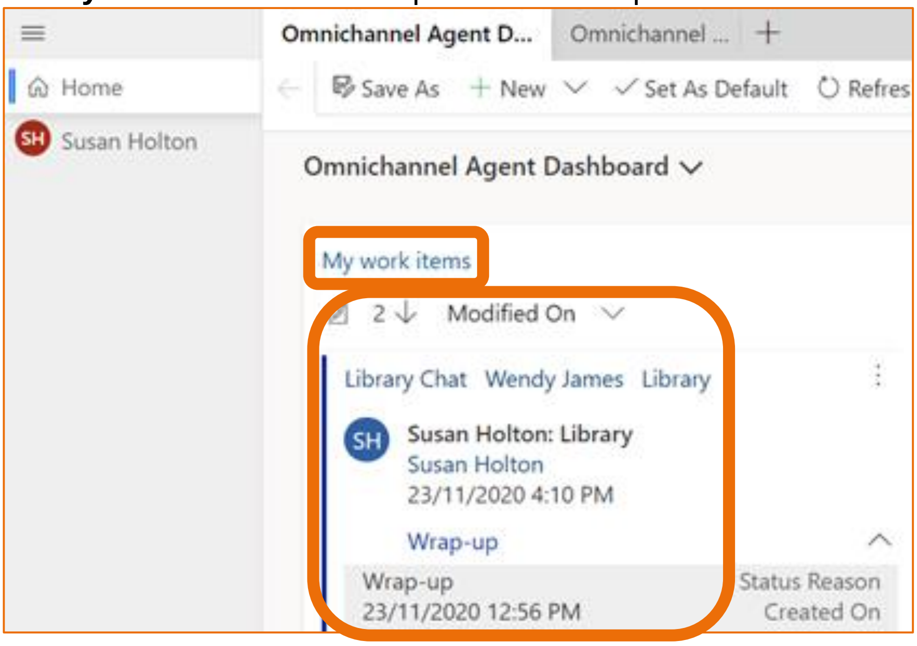
- When an Agent clicks **End** on the Chat with the Student it is classified as **Wrap-up**.
- When the Student ends the Chat by clicking the **X** it is classified as **Wrap-up**.
- When Wrap-up is completed the agent needs **X** adjacent to the Student's name in the Navigation Pane. The Chat then moves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



- 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.

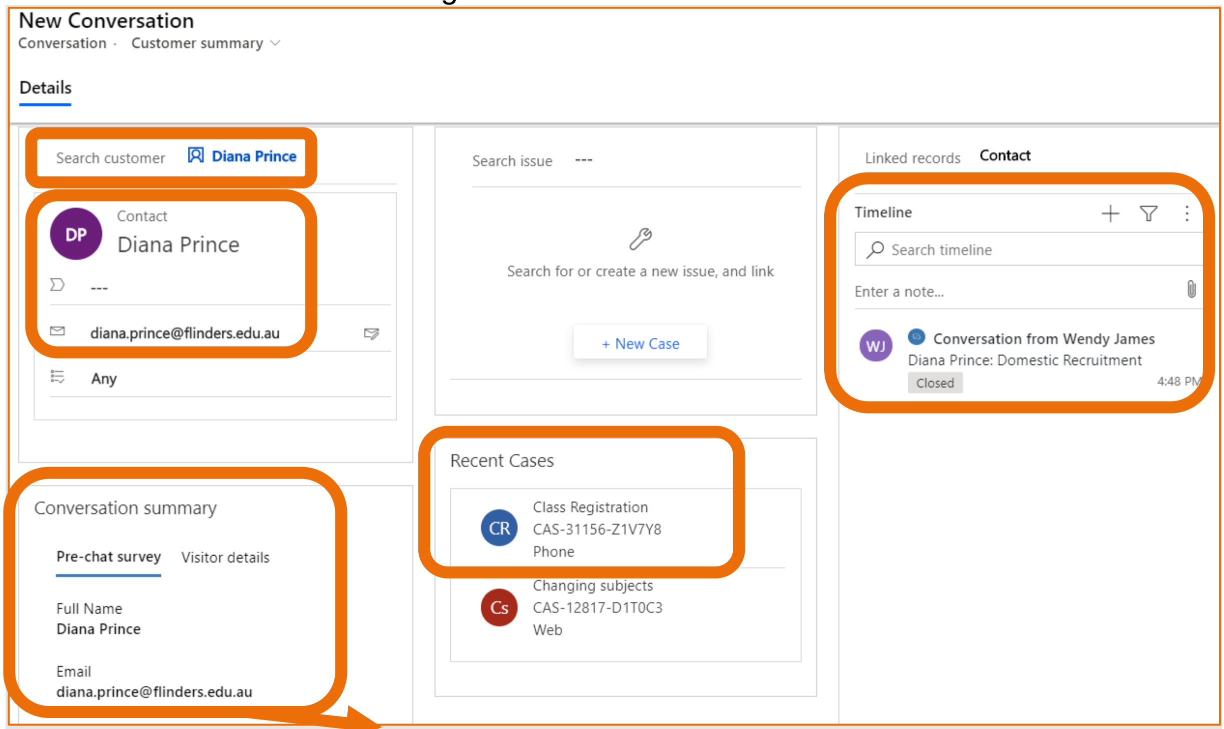
An overview of the Customer Summary

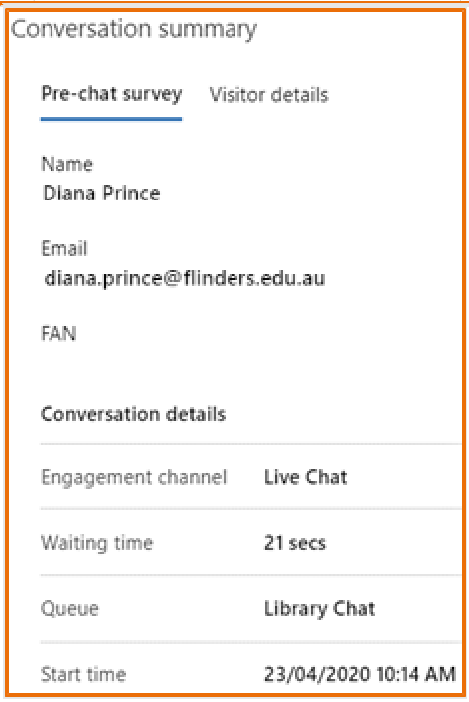
- When a Chat is accepted by the Agent the Pre-Chat Summary is always displayed in the Conversation summary pane.

- 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.

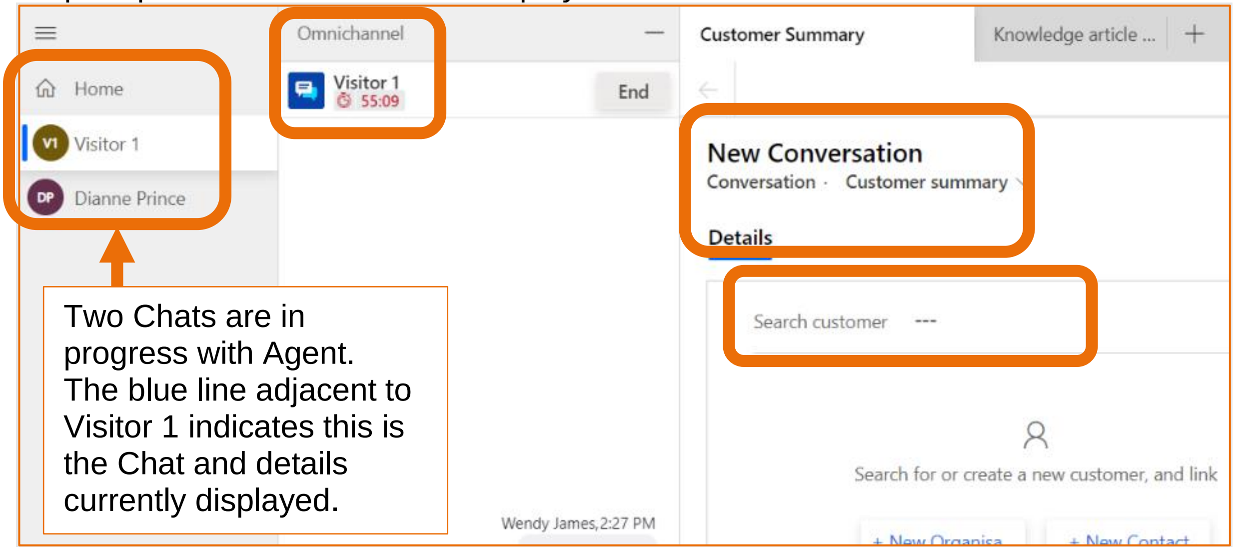




Search for a Contact Record

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.



2. Type FAN, Student ID, the 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.

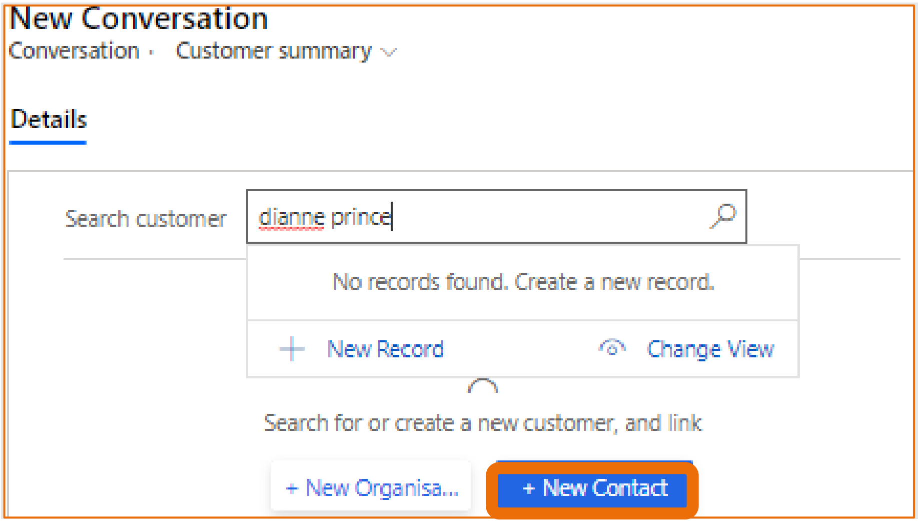
Create a new Contact Record

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.



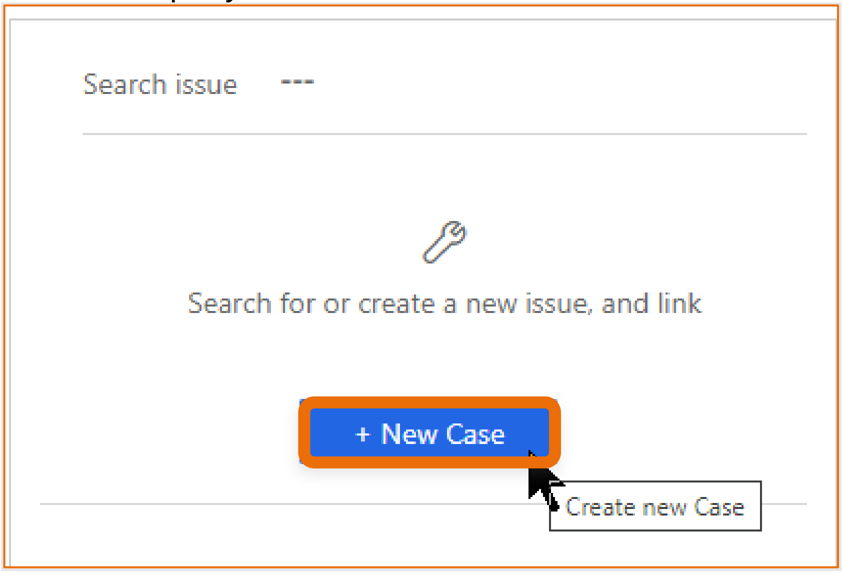
4. A new tab with the Contact Details is displayed the top of the screen. This can be closed by clicking the **X** to the right hand side of the tab name.

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.

Consult another Agent /c

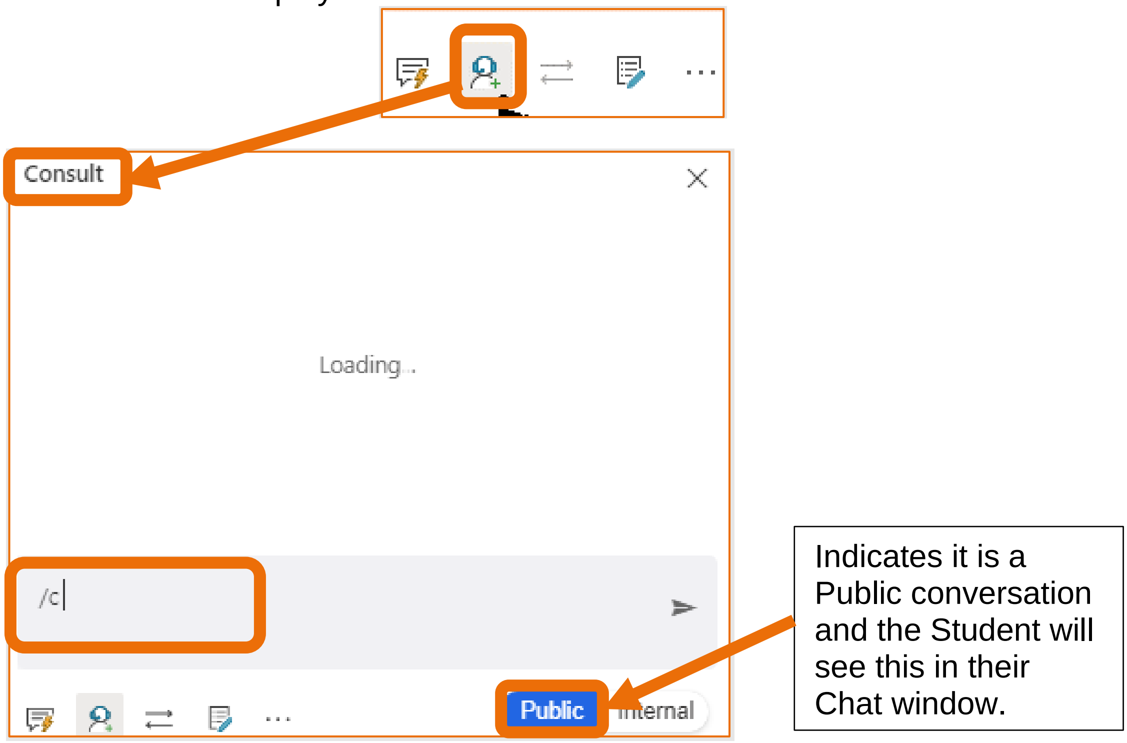
Consulting with another Agent on your team

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.

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



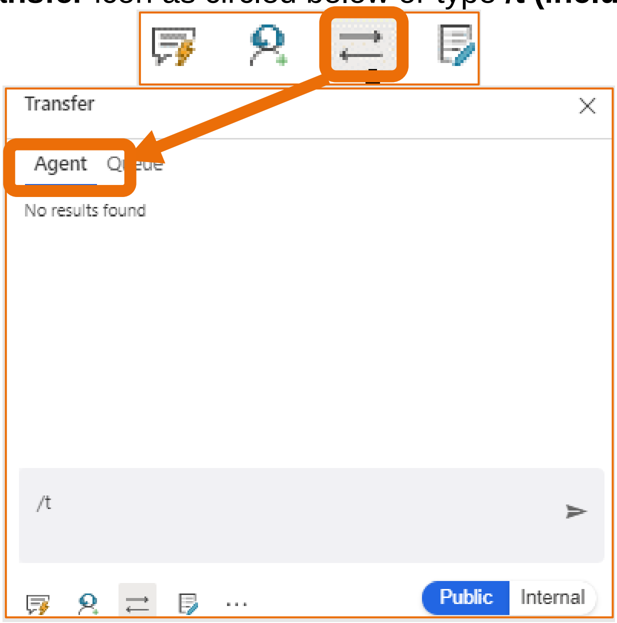
2. Type the first name of your Staff member adjacent to **/c (include a space)**.

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 **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.

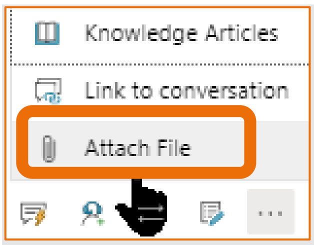
2. From the Contact Record Timeline, after the Conversation has been closed.

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.

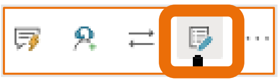
Sending a URL to Student

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

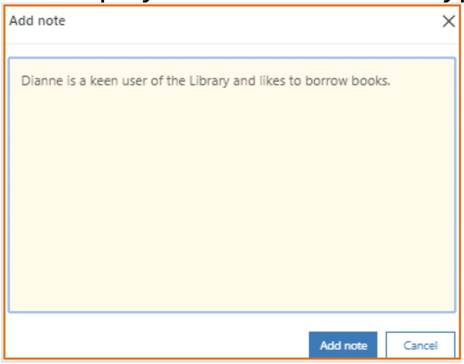
Take Notes Specific to the Chat

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.



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

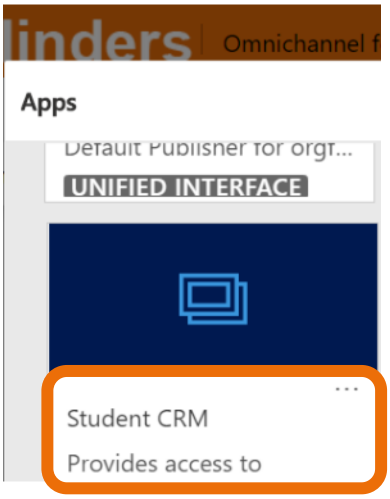


3. Click **Add note** . The Note will be added to the Contact Record Timeline.

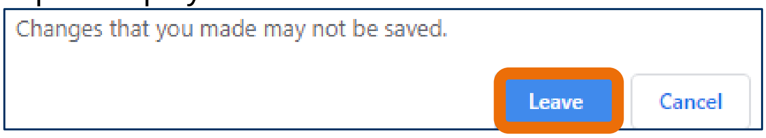
Display the Flinders Student CRM

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

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

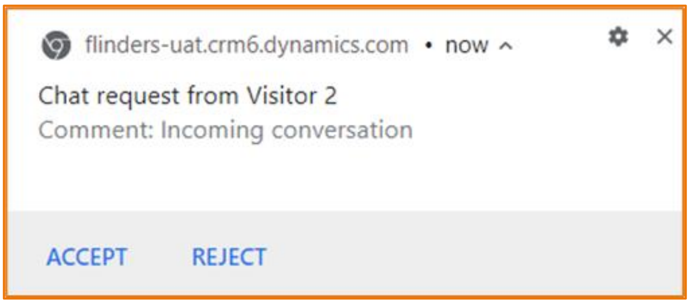


3. The following prompt is displayed. Click on **Leave**.

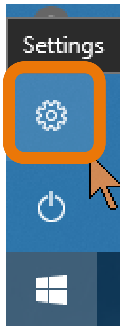


Windows Settings for Notifications

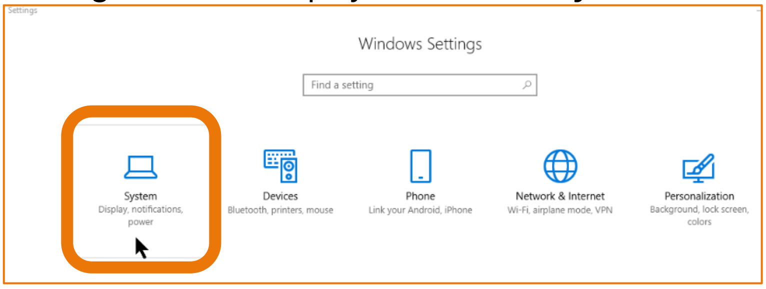
When Omnichannel is open but not the 'active screen', the Chat request will appear as a Desktop notification, similar to below. This notification depends upon these Windows settings.



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.



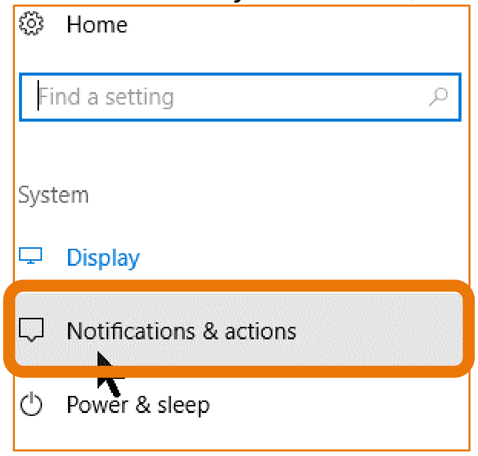
3. The **Windows Setting** window is displayed. Click on **System**.



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

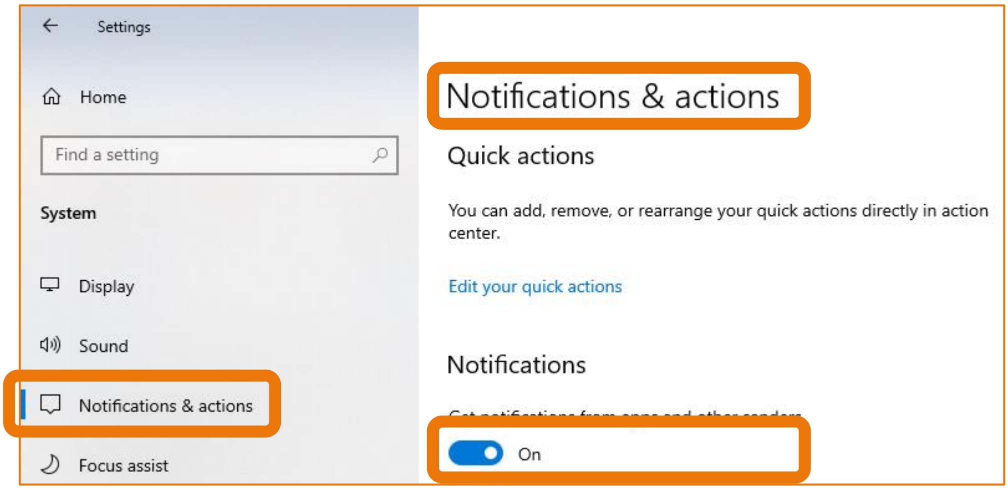
Notifications & actions

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



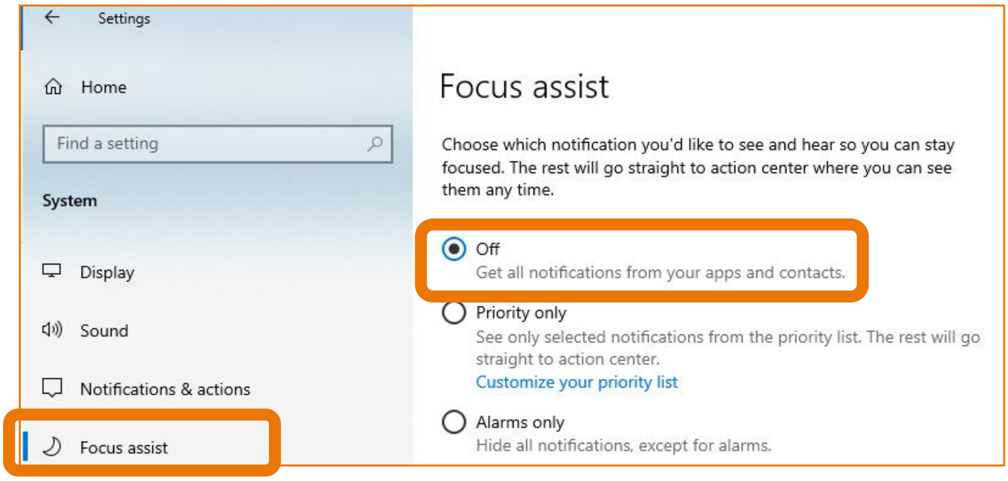
6. The **Notifications & actions** information is displayed.

7. Ensure the setting for **Notifications**: **Get notifications from apps and other senders** is turned on.



Focus assist

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



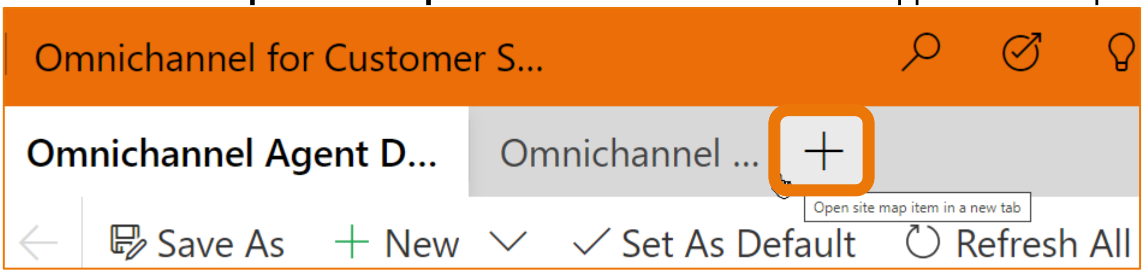
3. Click the **X** in the top right hand corner to close the Settings window.

Conversation Chimes – Sound Notifications when Chat is assigned to the Agent

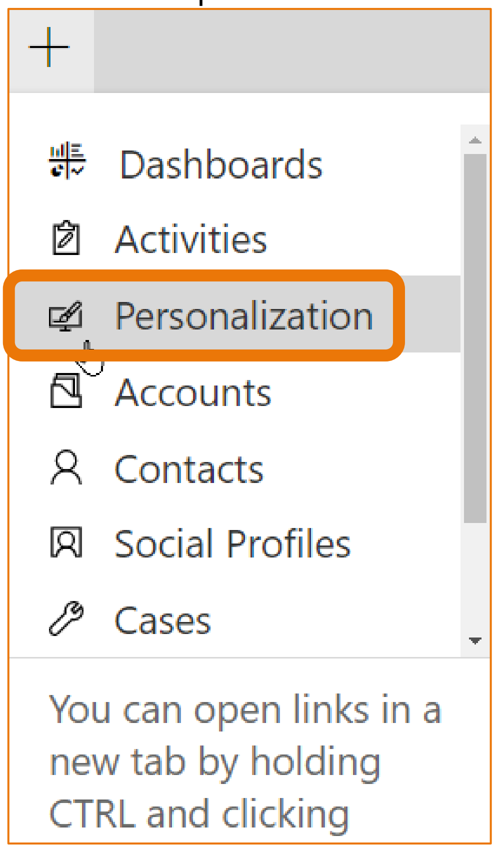
When a Chat is accepted by or assigned to an Agent a sound can enabled. The instructions below explain how to turn on sound notifications and select a sound.

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

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

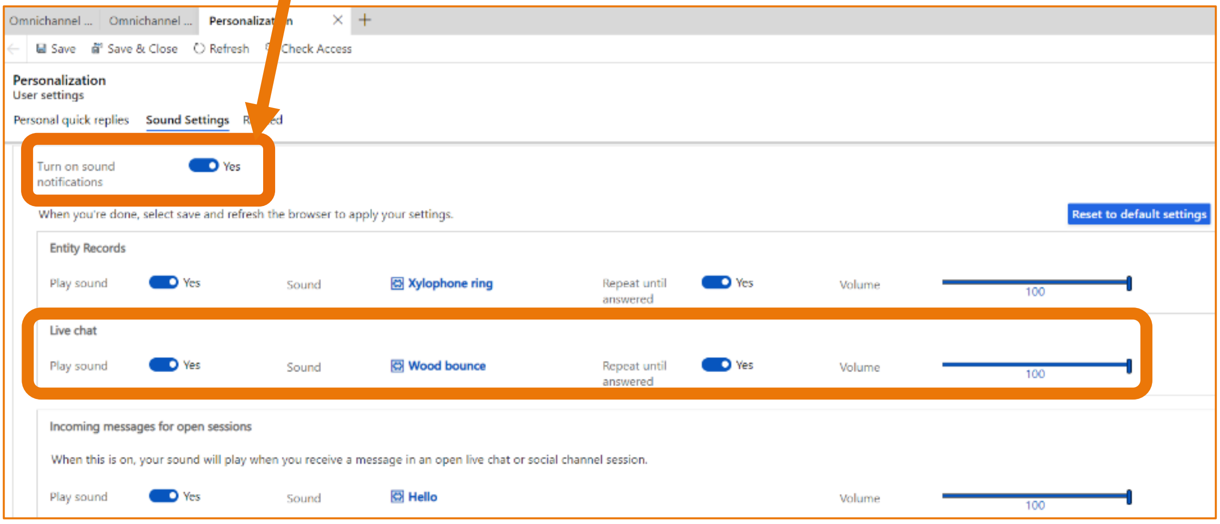


3. Click on **Personalisation** from the drop down menu.



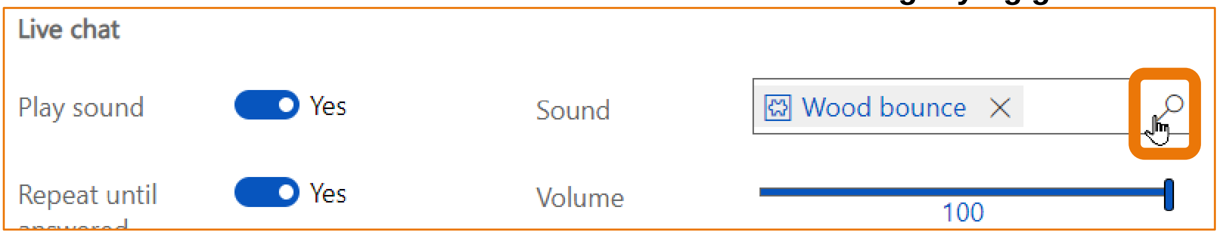
4. The **Sound Settings** tab and information is displayed.

5. **Turn on sound notifications** – the slider needs to be set to **Yes**. If set to No, click the slider once.

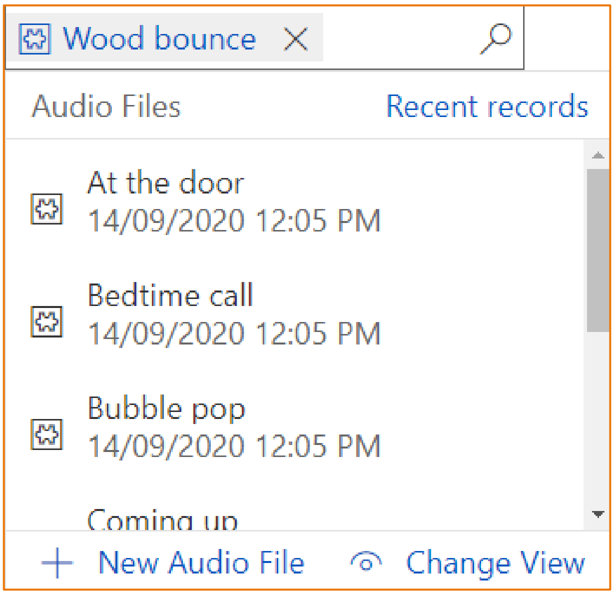


Change the sound, Live chat group

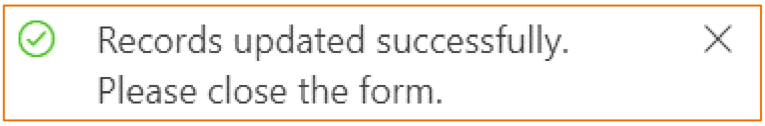
5. Rest the mouse on the current sound and click on the  **magnifying glass**.



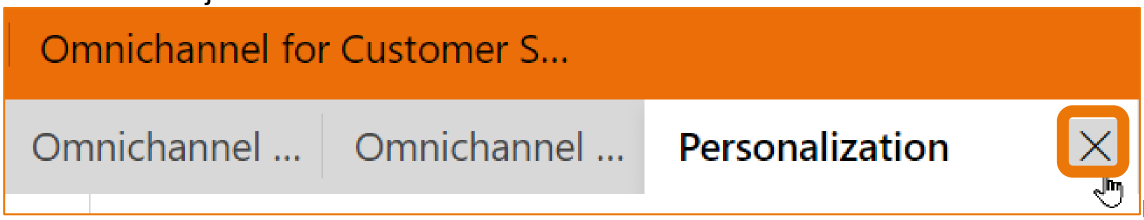
6. Click to select from the list. The Sound settings screen is automatically displayed.



7. Click 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.



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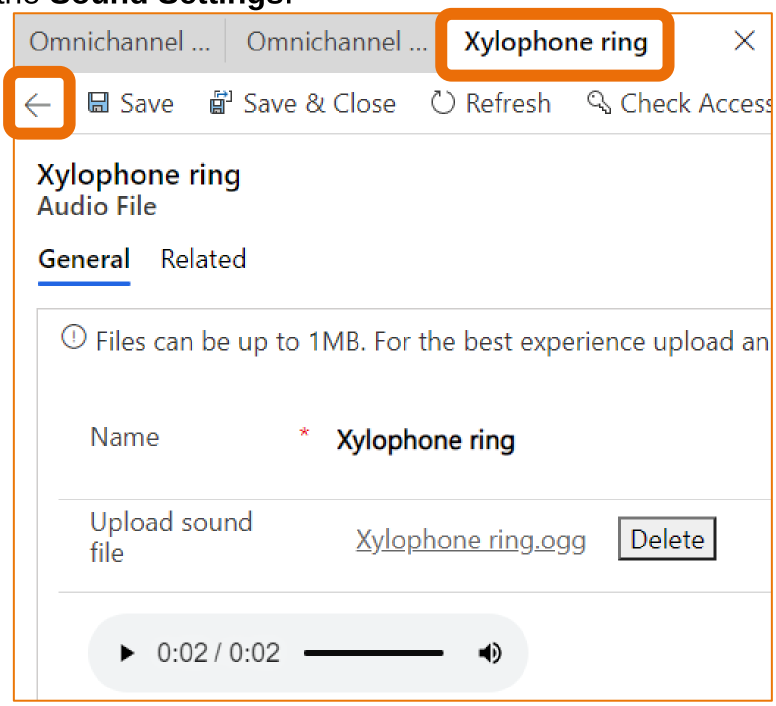
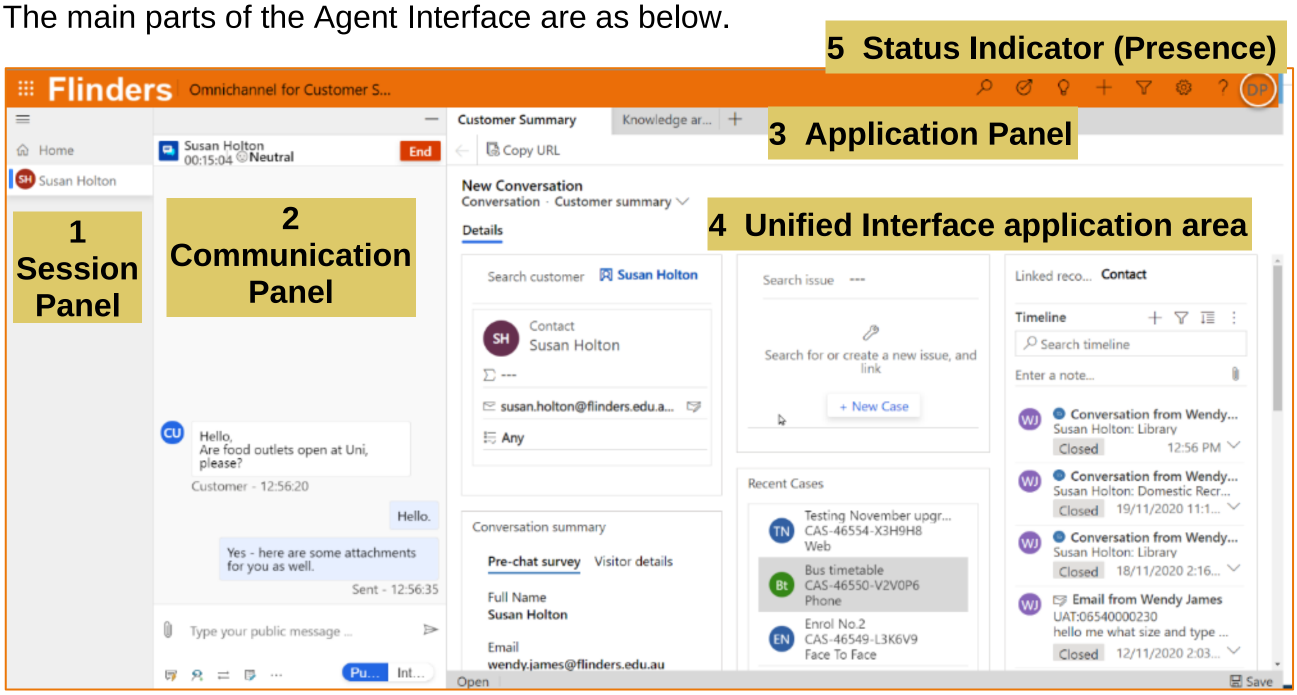
Play a sound

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 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.

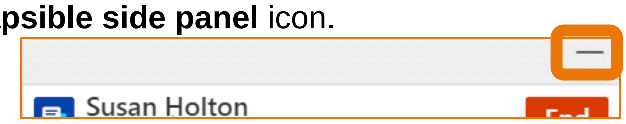


1 Session Panel

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.



The Communication Panel can be expanded by then clicking **Expand side panel** icon at the bottom of the screen

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 + sign enables another Dashboard to be opened.

4 Unified Interface application area

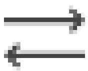
Displays the current information for the selected Chat.
Click **Home** in the Session Panel and the work streams My work items; Open work items; Closed work items are displayed (refer to **Omnichannel Agent Dashboard** on Page 9.

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.		**/i**
Public	The message is sent to the Student in the Chat conversation as well as any Agent who has joined the Chat conversation.		**/p**
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		**/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
1.0	April, 2020	Original notes. Uploaded to FLO.
2.0	June, 2020	Updated the **Webpages with a Chat Widget** on Page 4 with the following links: Main FLO Student Support landing page FLO Student Support contact page
3.0	July, 2020	Footer updated as AssystNET has been replaced by Service One. Uploaded to FLO.
4.0	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.
5.0	October, 2020	Updated for the Unified User Interface. Uploaded to FLO.
6.0	November, 2020	**Updated for the Microsoft November upgrade including:** **Information displayed when opening Live Chat, step 4 on Page 8.** **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.**
7.0	January, 2021	Updated to reflect minor changes in Live Chat and Windows. Uploaded to FLO.