MS Dynamics CRM Omnichannel
Flinders University

Live Chat
for the Supervisor

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October, 2020

Version 4.0

Contents

Omnichannel Administration for Customer Service

Omnichannel Roles

The Omnichannel includes 3 roles described below:

Administrator

This is a System Administration role and only members of the CRM Team are given this permission.

Supervisor

Permissions are as below and instructions on how to complete these tasks are included in this How to Guide.

- Can view the Queue Ongoing Conversations (in Active and Wrap-up states) as well as join the Conversation (refer to **Omnichannel Ongoing Conversations Dashboard** on Page 4;
- Can manually assign Conversations to an Agent or another Queue if the Conversation is open and not yet assigned. The Agents also have this ability.
- Can view / add / edit / delete Quick Replies (refer to **Quick** on Page8).
- Refer to **Omnichannel Administration** on Page 8 for a description of available features.

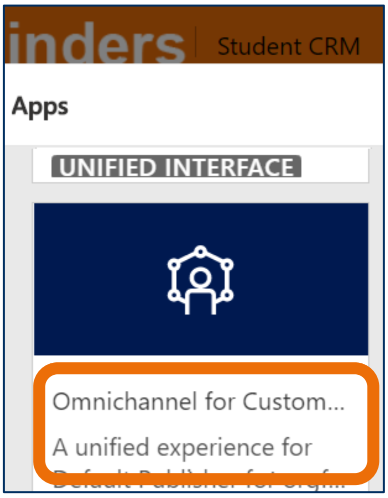
Agent

Agent is the term used for Staff in each Business who answer questions via Chat with Students using Live Chat.

Omnichannel Ongoing Conversations Dashboard

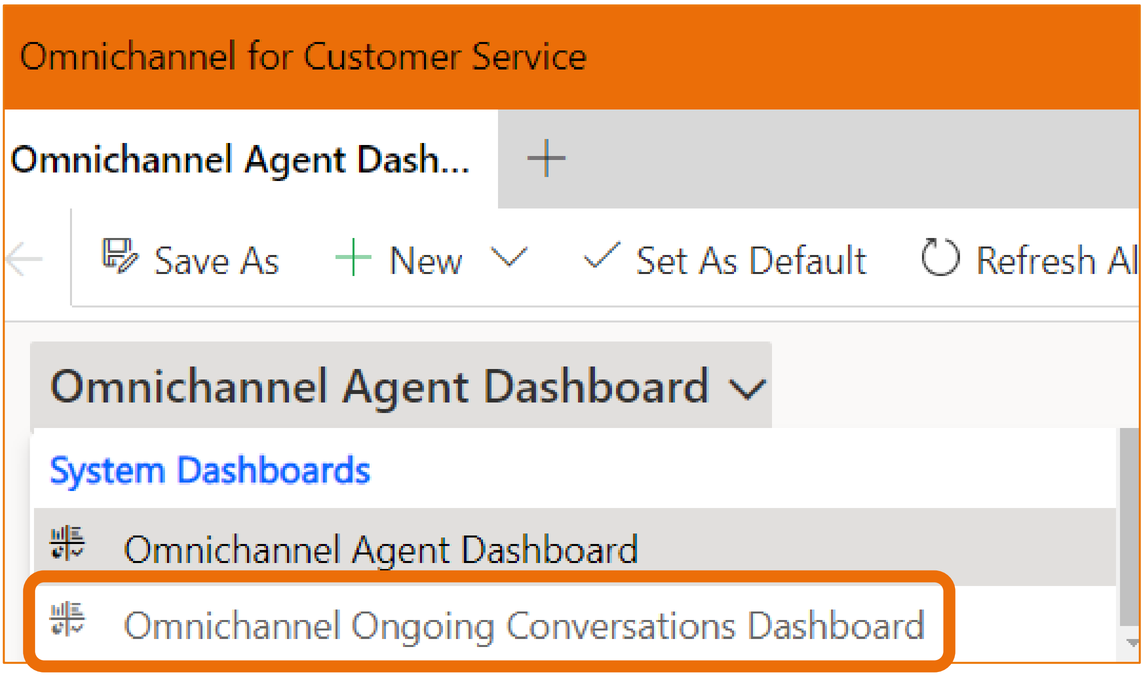
1. Open MS Dynamics Student CRM.
2. Click on **Student CRM** in the Navigation Menu.

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

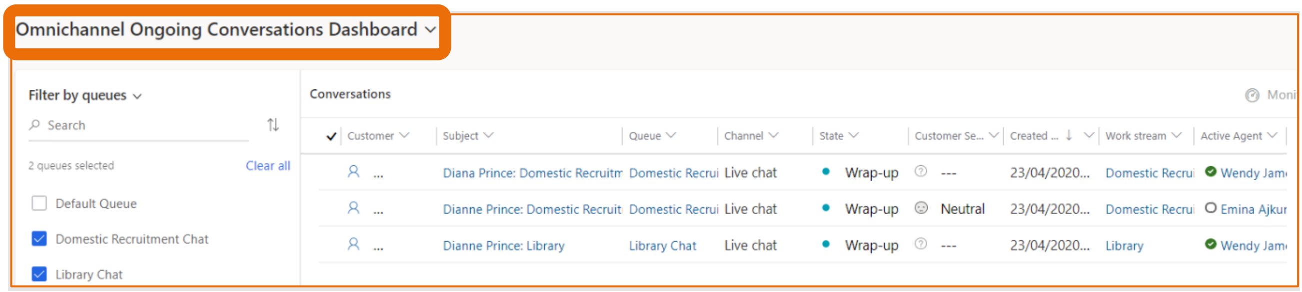


4. The **Omnichannel Agent Dashboard** is displayed.
   Click the drop down arrow adjacent to **Omnichannel Agent Dashboard**. Two System Dashboards are available to the Supervisor – **Omnichannel Agent Dashboard** and **Omnichannel Ongoing Conversations**.

5. Click on the **Omnichannel Ongoing Conversations** which displays the current Conversations.



6. The **Omnichannel Ongoing Conversations Dashboard** is displayed.

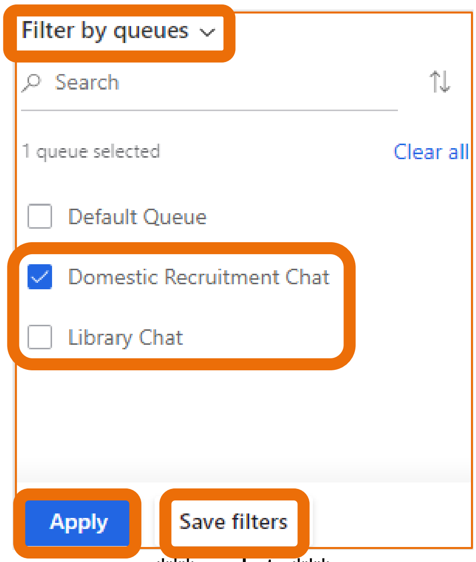


update

Filter by Queues

7. Click adjacent to your Queue.

8. Click on **Apply** and then click on **Save filters** at the bottom of the **Filter by queues** pane to save the setting.



update

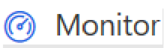
Monitor the Conversation

The Supervisor can monitor the Conversation without the knowledge of the Agent or Student until **Join chat** is selected. The Supervisor can see the current Conversation, Contact information and saved Conversations.

1. Select the Omnichannel Ongoing Conversations Dashboard.

2. The list of Conversations which are Open or in Wrap-up are displayed.

3. Click to the left of a Conversation to select it. A tick is inserted in the left hand column and the Record covered in blue.

4. Click on 

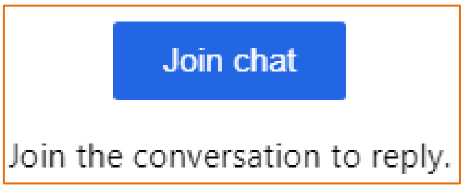
Monitor in the top right hand corner of the screen.

5. The conversation page opens with a prompt at the bottom of the screen '**Monitoring of conversation initiated: name of Student and Team**'.

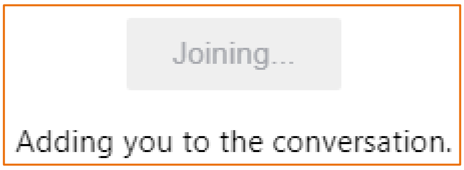
6. The Communication Panel is displayed with the conversation displayed.

Join the Conversation.

7. Click on Join chat **Join chat** in the bottom left hand corner of the screen.

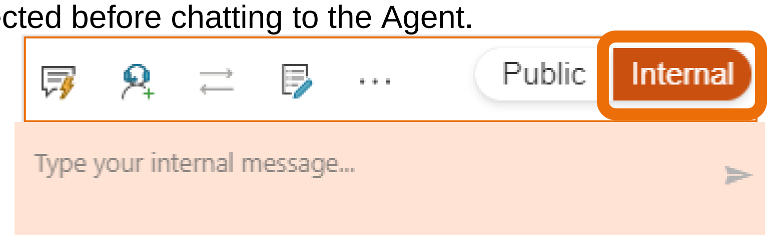


8. The following may appear for a short while.



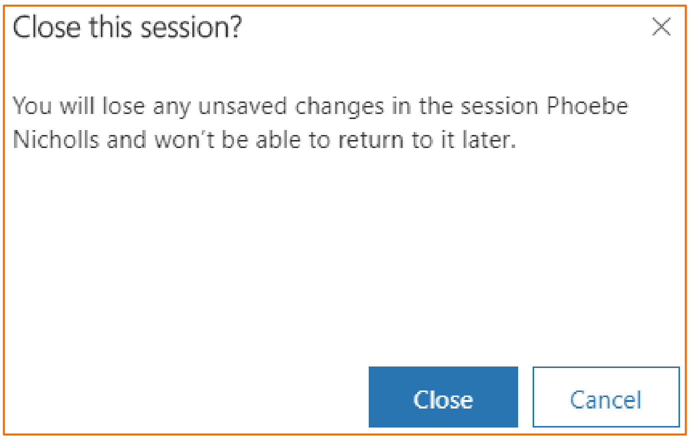
9. When the Supervisor has joined the conversation a notification is sent to **both the Agent and Student** advising the Supervisor (first name only displayed to the Student) has joined.

10. By default, the conversation mode is **Internal** meaning the Student will not see the information typed between Agent and Supervisor. This is indicated by an orange background for the text and **Internal** selected as shown below, though always check Internal is selected before chatting to the Agent.



11. Click the **X** adjacent to the Student's name in the **Session Panel**, on the left hand side of the screen to exit the Conversation. The Conversation is still open with the Agent.

12. The following prompt is displayed. As the Agent is still assigned to the Conversation, the Supervisor is only exiting and the Agent still 'owns' the Conversation.



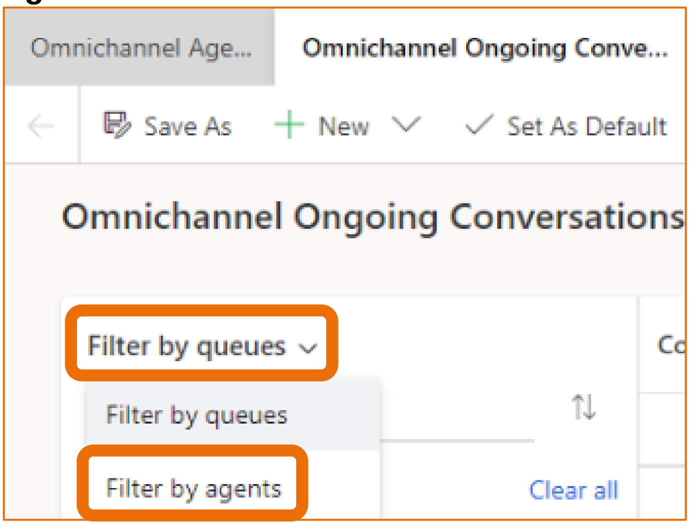
Filter by Agents

The facility to view the Status (Available, Busy, Offline, Appear Away, Do not disturb) of Agents at one glance, is via the **Ominchannel for Ongoing Conversations**, **Filter by agents**.

Refer to **Omnichannel Ongoing Conversations Dashboard**, steps 1 to 5 on page 4.

5. Click the drop down arrow adjacent to **Filter by queues**.

6. Click on **Filter by agents**.

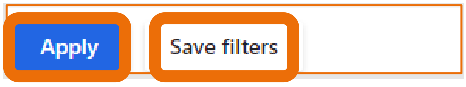


7. Filter by agents displays all of the Flinders University Agents using Live Chat.

Filter your Team's Agents

8. Click adjacent to each Agent in your Team to select them.

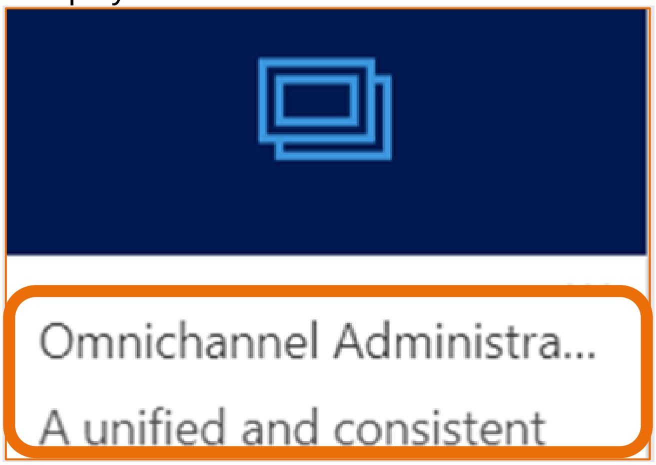
9. Click on **Apply** and then click on **Save filters** at the bottom of the **Filter by queues** pane to save the setting.



Omnichannel Administration

1. Click on **Student CRM** (or Omnichannel for Customer Service) in the Navigation Menu.

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

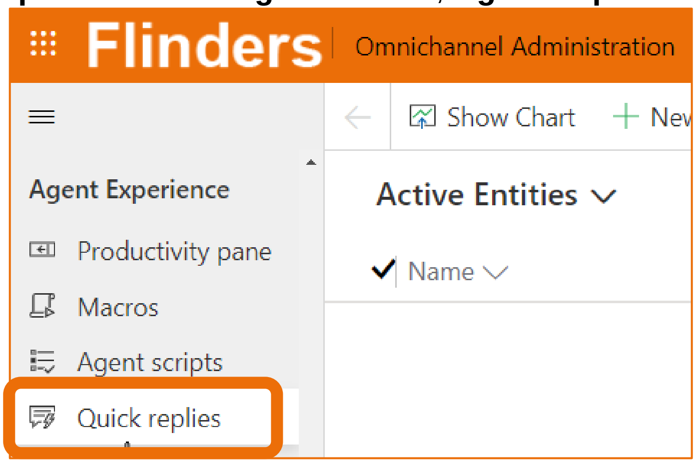


Quick Replies (previously Quick Responses)

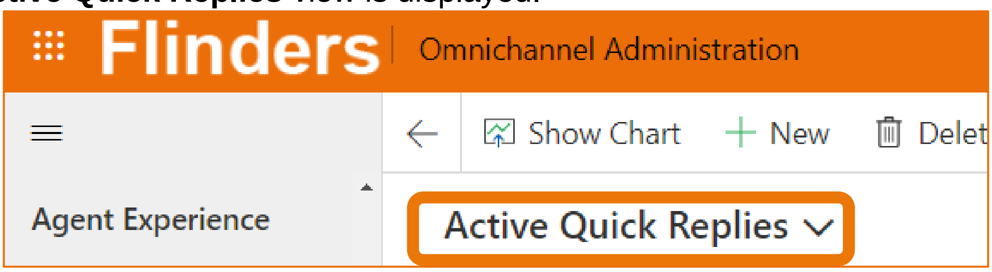
Live Chat Quick Replies are used by all the Teams. The Supervisor can edit the Quick Replies with the awareness this will affect all Agents. There is a facility to tag Quick Replies into categories to assist with unique replies for each Team.

Display Quick Replies

1. Click on **Quick Replies** in the **Navigation Pane**, **Agent Experience**.

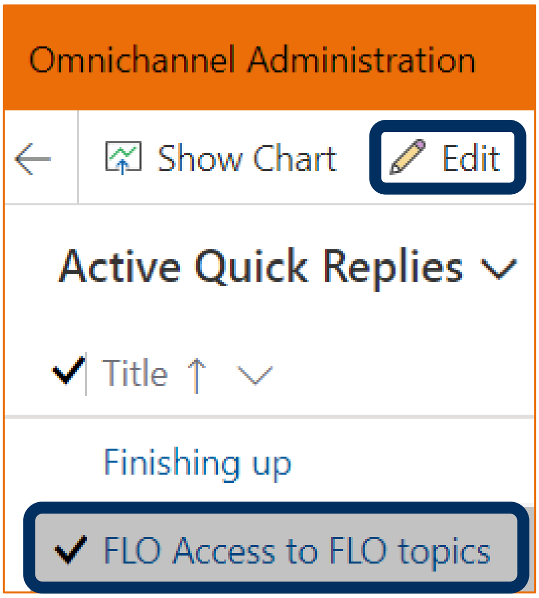


2. The **Active Quick Replies** view is displayed.



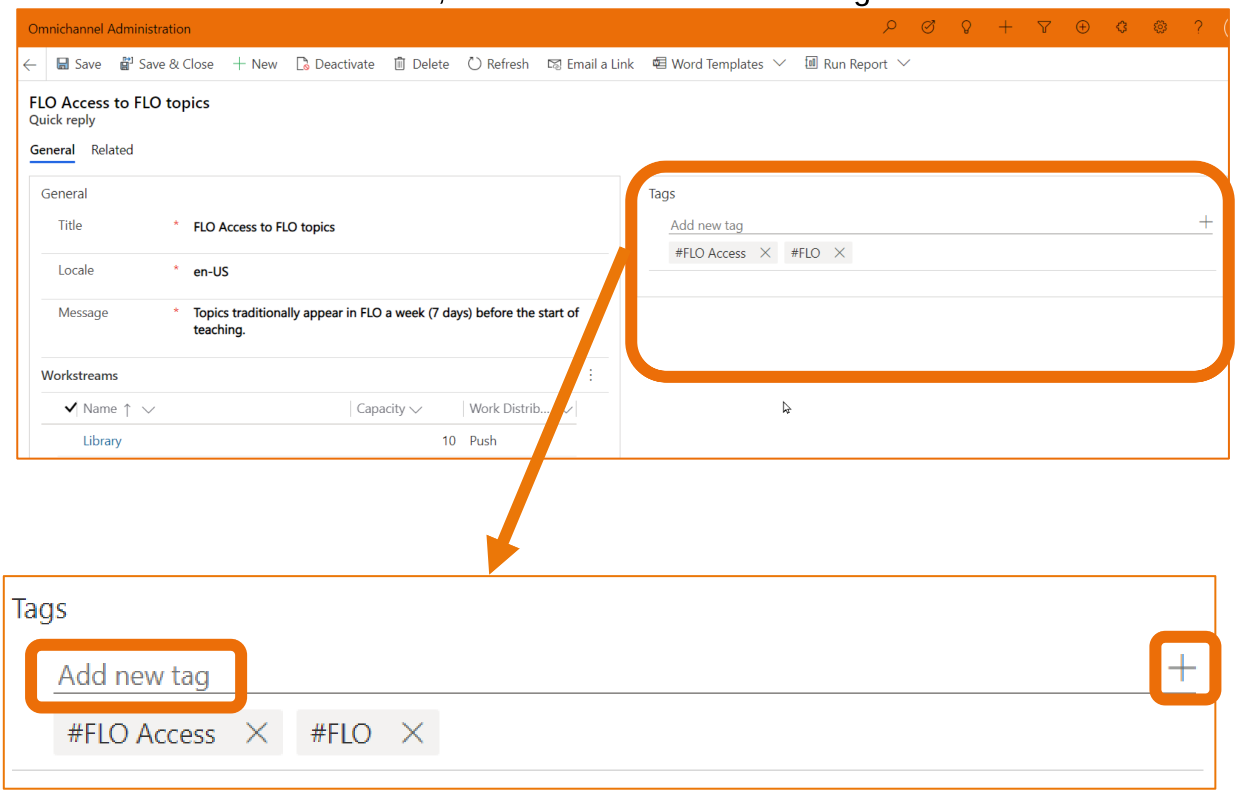
3. Click to the left of the Quick Reply Title.

4. A tick is inserted, the line is covered in blue and the  **Edit** icon is displayed in the menu bar.



Tag a Quick Reply

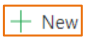
5. The is Quick Reply is displayed.
   Click in the **Add new tag** field and type the tag. If the tag already exists, click on it the list below the field. Otherwise, click the **+** to add the new tag.



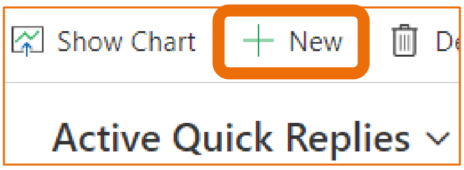
6. Click  **Save & Close** in the menu bar. The Active Quick Replies view is displayed.

Create a Quick Reply

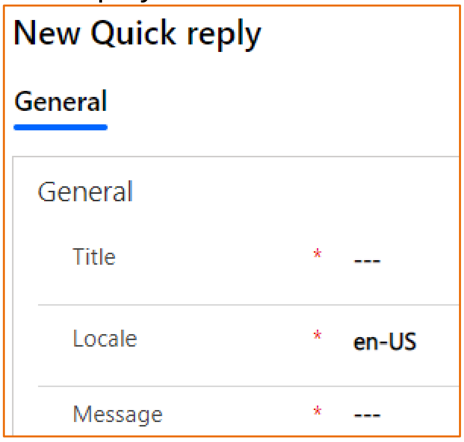
Refer to **Quick Replies (previously Quick Responses)**, steps 1 and 2 on Page 8 to display the **Quick Replies** view.

3. Click on 

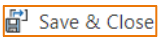
+ New in the menu bar.



4. The **New Quick** reply form is displayed.



5. Complete the **Title** and **Message** information.

6. Click 

Save & Close in the menu bar. The **Active Quick Replies** view is displayed.

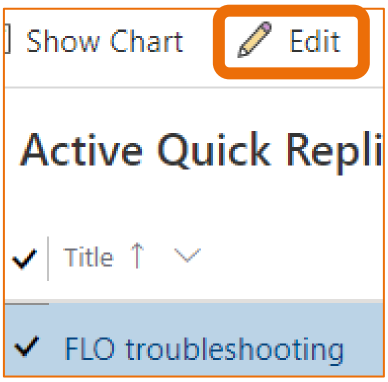
Edit a Quick Reply

Refer to **Quick Replies (previously Quick Responses)**, steps 1 and 2 on Page 8 to display the **Quick Replies** view.

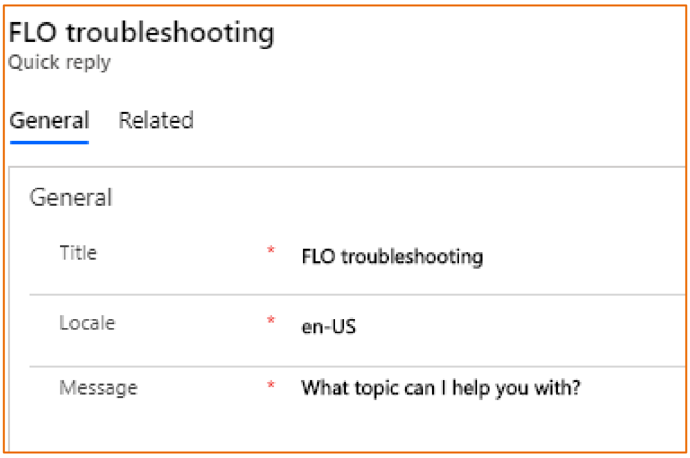
3. Click to the left of the Quick Reply Title.

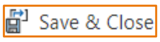
4. A tick is inserted, the line is covered in blue and the 

Edit icon is displayed in the menu bar.



5. Edit the information.



6. Click 

Save & Close in the menu bar. The Active Quick Replies view is displayed.

Version Control

Version Number	Version Date	Changes
1.0	May, 2020	Original notes. Uploaded to FLO.
2.0	May, 2020	Added **Filter by Agents** on Page 7
3.0	July, 2020	Footer updated as AssystNET has been replaced by Service One. Uploaded to FLO.
4.0	October, 2020	Updated for Unified User Interface. Uploaded to FLO.
5.0	January, 2021	Updated to include reference to O'Week.