



# MS Dynamics CRM Omnichannel Flinders University

# Live Chat for the Supervisor

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Contents	
Omnichannel Administration for Customer Service	3
Omnichannel Roles	3
Administrator	3
Supervisor	3
Agent	3
Omnichannel Ongoing Conversations Dashboard	4
Filter by Queues	5
Monitor the Conversation	5
Join the Conversation	6
Filter by Agents	7
Filter your Team's Agents	7
Omnichannel Administration	8
Quick Replies (previously Quick Responses)	8
Display Quick Replies	8
Tag a Quick Reply	9
Create a Quick Reply	.10
Edit a Quick Reply	.10
Version Control	.12

# **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.

Omnichannel Ongoing Co	nversatio	ons Dashboard 🕥								
Filter by queues $\checkmark$		Conversations								Ø Moni
♀ Search	î↓	$\checkmark$ Customer $\checkmark$	Subject $\vee$	Queue $\vee$	Channel $\checkmark$	State $\checkmark$	Customer Se $\vee$	Created $\downarrow$ $\checkmark$	Work stream $\vee$	Active Agent $\smallsetminus$
2 queues selected	Clear all	A	Diana Prince: Domestic Recruitm	r Domestic Recru	i Live chat	• Wrap-up	o	23/04/2020	Domestic Recru	Wendy Jame
Default Queue		A	Dianne Prince: Domestic Recruit	t Domestic Recru	i Live chat	<ul> <li>Wrap-up</li> </ul>	Over the second seco	23/04/2020	Domestic Recru	O Emina Ajkur
Domestic Recruitment Chat		A	Dianne Prince: Library	Library Chat	Live chat	• Wrap-up	o	23/04/2020	Library	Wendy Jame
Library Chat										
			***u	pdate*	**					

#### 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.

Filter by queues $\sim$								
⊘ Search								
1 queue selected Clear all								
Default Queue								
Domestic Recruitment Chat								
Library Chat								
Apply Save filters								
***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* 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** in the bottom left hand corner of the screen.



8. The following may appear for a short while.

	Joining	
Adding	you to the conversa	ation.

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.

Consult with Wendy James has started.							
Тур	oe you	ır inter	nal m	essage	·	>	
<b>7</b>	Q+	$\stackrel{\longrightarrow}{\leftarrow}$	P		Public	Internal	

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.

<b>F</b>	<b>P</b> ‡	$\stackrel{\longrightarrow}{\leftarrow}$	P		Public	Internal
Type y	your int	ernal m	iessage	<u></u>		≻

- 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.

Close this session?			$\times$
You will lose any unsaved chang Nicholls and won't be able to ret	es in the sessio turn to it later.	n Phoebe	
	Close	Cancel	

#### 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.

Om	nichannel Age	Omnichanne	el Ongoing Conve	e
$\leftarrow$	Save As	+ New $ \smallsetminus $	🗸 Set As Defa	ult
C	Omnichanne	l Ongoing	Conversatio	ons
	Filter by queue	es ~		Co
	Filter by queue	es	î↓	
	Filter by agent	s	Clear all	

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.

Flinders	On	nnichannel Admini	stration	
=	$\leftarrow$	🛱 Show Chart	+ New	🗓 Delet
Agent Experience	A	Active Quick Re	eplies 🗸	

October, 2020 Version 4.0

CRM How to Guide Live Chat for the Supervisor.docx Need help with the CRM? Use the Okta, Service One web form. Find the appropriate form for a Request or Incident and

complete the details.

- 3. Click to the left of the Quick Reply Title.
- 4. A tick is inserted, the line is covered in blue and the *Ldit* **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.

Omnichannel Administration	٩	Ø	8	+	7	÷	\$ ÷	?
🔶 🖶 Save 📽 Save & Close 🕂 New 🗋 Deactivate 📋 Delete 🕐 Refresh 🖾 Email a Link 🖷 Word Templates 🗸 🗐 Run Repc	ort 🗸							
FLO Access to FLO topics Quick reply General Related								
General								
Title * FLO Access to FLO topics Add new tag								+
Locale en-US #FLO Access × #FLO ×								
Message * Topics traditionally appear in FLO a week (7 days) before the start of teaching.								
Workstreams :								
✓ Name ↑ ∨     Capacity ∨     Work Distrib     ✓								
Library 10 Push								
Tags								
Add new tag							 E	F
#FLO Access $\times$ #FLO $\times$								

6. Click Save & Close 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.

New Quick reply						
General						
General						
Title	*					
Locale	*	en-US				
Message	*					

- 5. Complete the **Title** and **Message** information.
- 6. Click Save & Close 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 *L*dit Edit icon is displayed in the menu bar.



5. Edit the information.

FLO troubleshootin Quick reply	ng	
General Related		
General		
Title	*	FLO troubleshooting
Locale	*	en-US
Message	*	What topic can I help you with?

6. Click Save & Close 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.