SmartAgent Training

e-mail Chat & Queued Tasks Module

Version	Date	Author	Changes
2.31	18/04/2023	Paul Egan	Email chat & Queued tasks Module

Introduction

The purpose of this guide is to provide you with an introduction to using SmartAgent for email Chat and managing Queued tasks.

There are some training modules to work through and each is supported by a talk-through and demonstration by your SmartAgent Trainer.

You're welcome to ask questions throughout the session and there'll be an opportunity at the end of the course for any further questions or comments.

Pre-requisites for this training

To successfully complete this training you will require the following:

1. Access to a workstation
2. Access to the internet
3. Google Chrome browser
4. Your SmartAgent username

We also recommend that you have completed the Agent Training guide for core navigation and logging into the system.

About SmartAgent Email chat and Queued Task management

SmartAgent is an agent application for Amazon Connect. It runs in your browser and simply requires an internet connection and a headset to enable contact.

When used for email chat it will be configured for your organisation and will pickup themes and settings of the mailbox a particular queue is linked to. Therefore the screenshots in this guide are used for illustrative and training purposes and so do not represent the compete content of emails that your customers will receive.

This guide also covers Queued task management which allows you to reply in bulk to emails, add attachments or move emails to different queues. This feature will need to have been configured for your organisation and access to particular aspects can be further tweaked by changing permissions within security profiles to add or remove the ability to add attachments, end tasks as needed by your organisation.

Agenda

Module 1: Email Chat - Core Navigation

By the end of this module you will be able to:

- Answer an email Chat contact (inbound)
- Use the Quick reply function and formatting tools
- Understand **A**fter **C**all **W**ork (ACW) mode and how to use it

Answering an inbound email Chat

Just as with a voice contact, Inbound email chat contacts are distributed to you based on your **Routing Profile** which has been applied by your Supervisor. Contacts are queued in the order they are received, and you will be offered the next chat in the queue as soon as your status is set to **Available**.

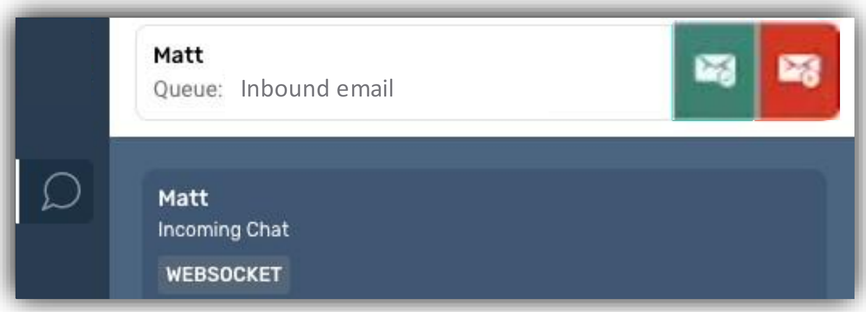
When a new contact arrives, SmartAgent:

- Changes your status to **Inbound contact**
- Displays the contact information in the header

There are call answering options, and your Admin will have chosen which option applies to you:

1. Auto-answer: This means an email Chat will be accepted automatically.

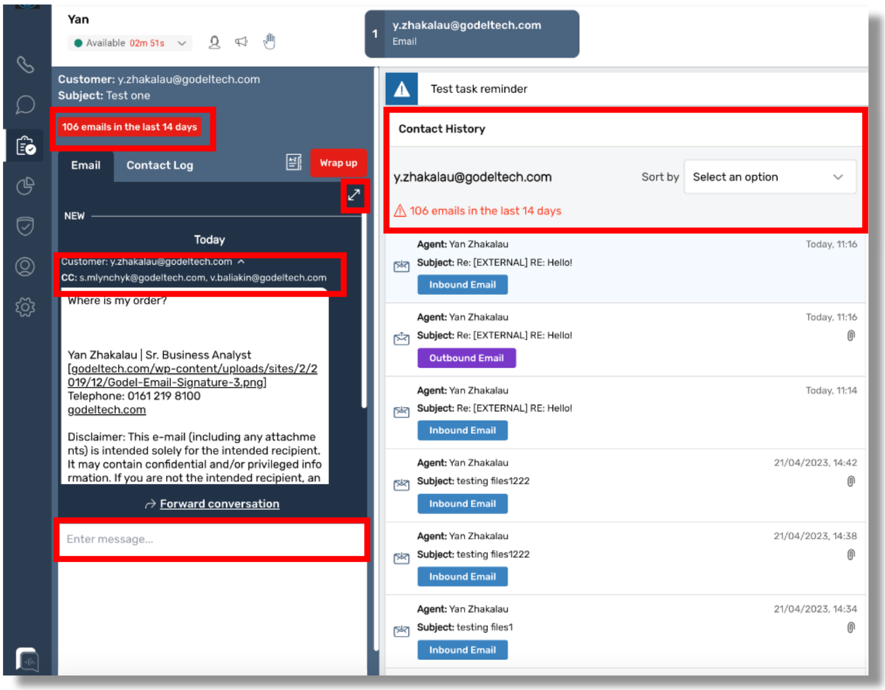
2. Manual-answer. You will need to click the **green button** in the heard to respond to a chat.



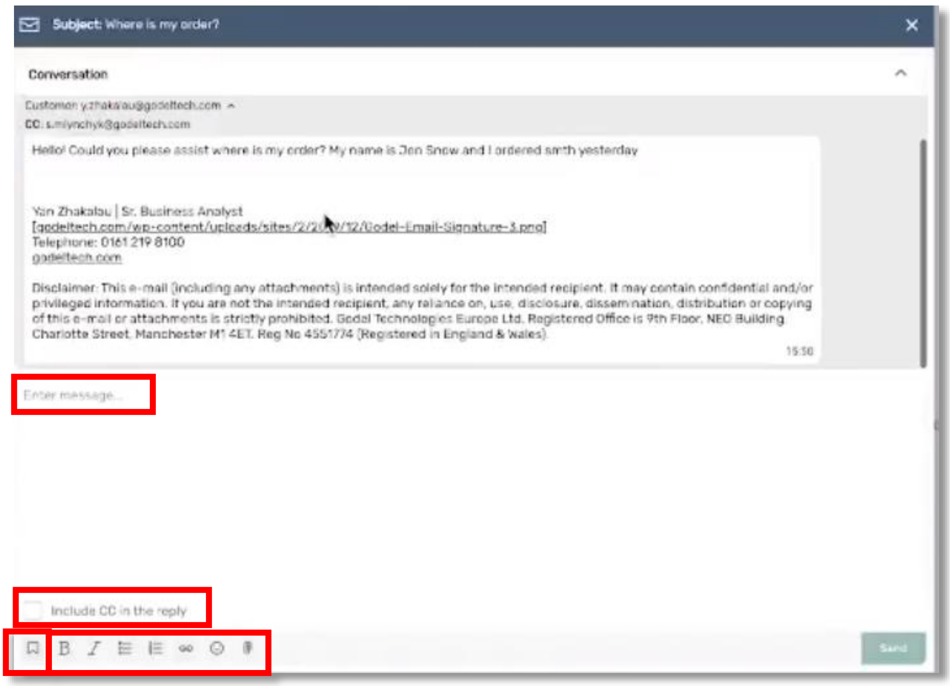
When an email chat is answered, SmartAgent:
- Changes your status to **In contact**

- Displays the in-chat controls

You may receive onscreen prompts if a customer has been in regular contact within a set period and you may also be able to access the contact history from that email address if that feature has been enabled for your organisation.



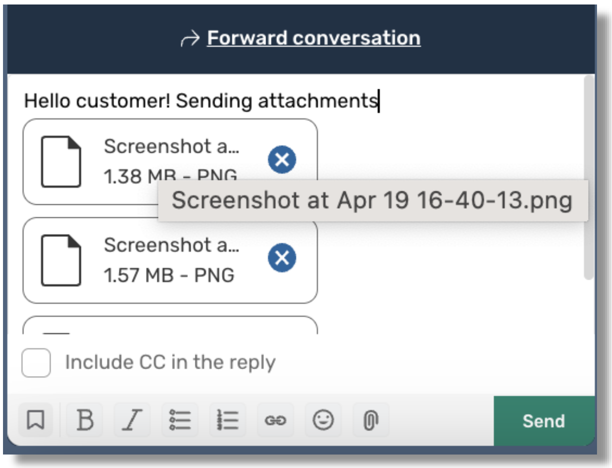
You can click into the email address field to review who has been CC'd into the email and can use the diagonal arrow in the top right to open the email into a larger window to see the whole email while writing your response.



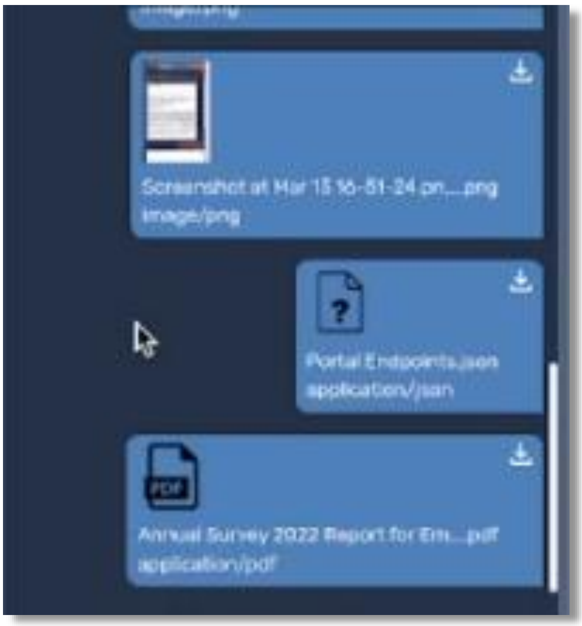
Within this view, just as in the normal chat view you can click on the Quick reply button on the bottom left to access any of your organisations Quick Replies. You can also select the button to include the CC'd email addresses in your response.

You also have access to a range of formatting options, emoticons, and attachments if these have been enabled for you to use.

If you select the add attachment icon you will need to browse your files to find the attachment and select it. These attachments will then be viewable in the chat message, for you to check before sending your message. If you hover your mouse over the file icon you will be shown the full file details to ensure you are sending the correct attachment.

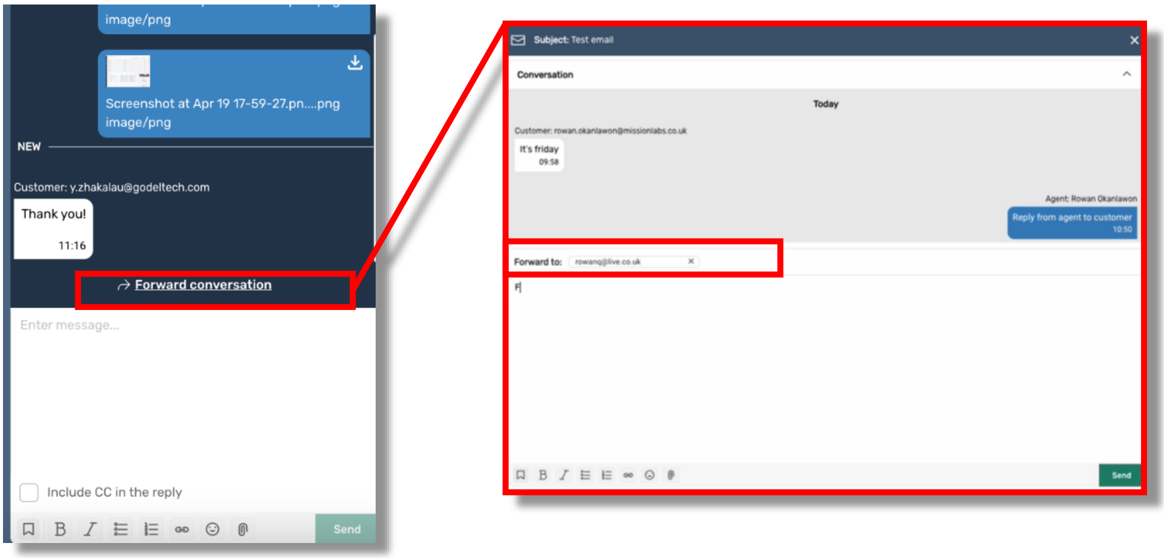


Once sent, each attachment will appear as a separate item within the chat window with a matching icon , based on the file type, but the addressee will receive one email with multiple attachments.



Forwarding an email conversation

If you have the Forwarding email feature enabled in email, an Agent will have the option to forward an ongoing email conversation to a specified email address.

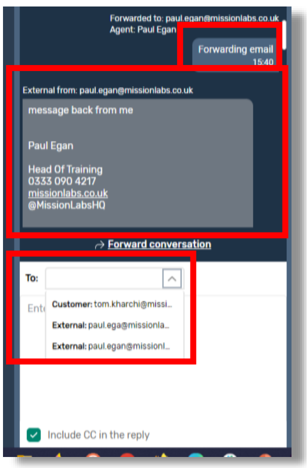


In order to do this, select the “Forward email Conversation” link and a new screen appears where they can review the email conversation.

The Agent then inputs an email address in the “forward to” field.

They can add a message to the forwardee, if required, before hitting the send button to forward the email to that person.

If the person who the mail has been forwarded to responds to the email, this message is placed back into the Queue marked as coming from an external source.

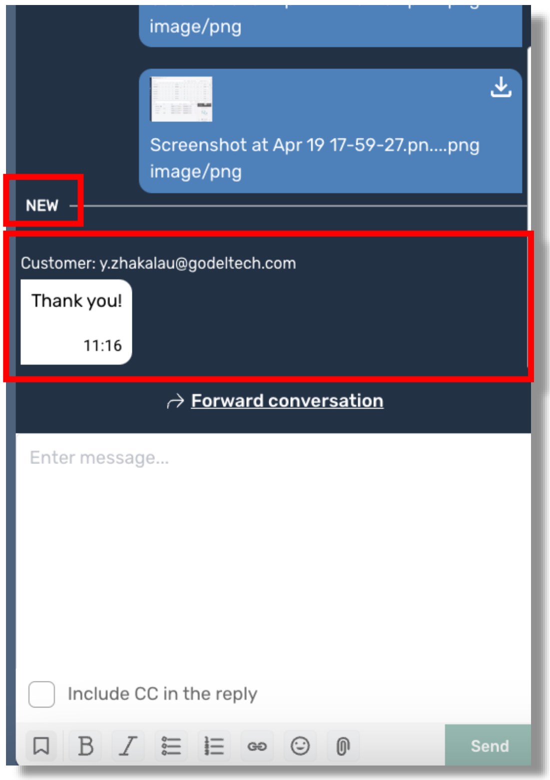


The Agent can then choose to converse with the forwardee or the customer by selecting their email address in the dropdown field as required.

Response back to same agent

If you have the threaded response feature enabled in email, if a customer responds to the email straight away, or within an agreed period, the email response will be presented to the agent as a “new” interaction within the email chat, just like a normal chat interaction.

The Agent will get an onscreen notification of a new element in the chat and the response from the customer.



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If the response comes outside of the agreed time parameters, the response will be presented to the next available agent, however the agent will be able to see the previous discussion and email conversation and pick up the conversation thread.

After Contact Work (ACW)

If the agent believes that the email conversation has reached a conclusion you can select the option to end the chat and enter wrap up a by clicking on “wrap up” and the After contact work section will appear.

You will have the opportunity to add any notes or other preconfigured info in the contact log and then click the **Finish wrap up** button. To make yourself available for further contacts

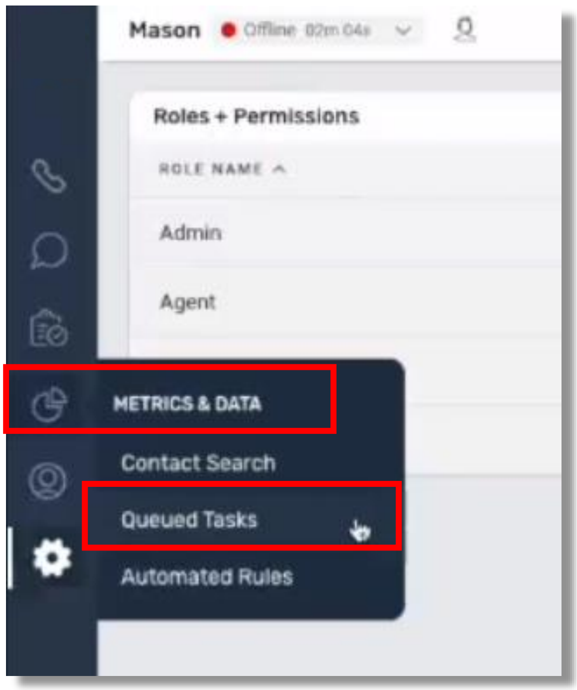
Module 2: Queued Tasks

By the end of this module you will be able to:

- Utilise the Queued tasks menu options to manage email queues
- Understand the configuration options available and how to amend these for particular security profiles

Queued Tasks Navigation

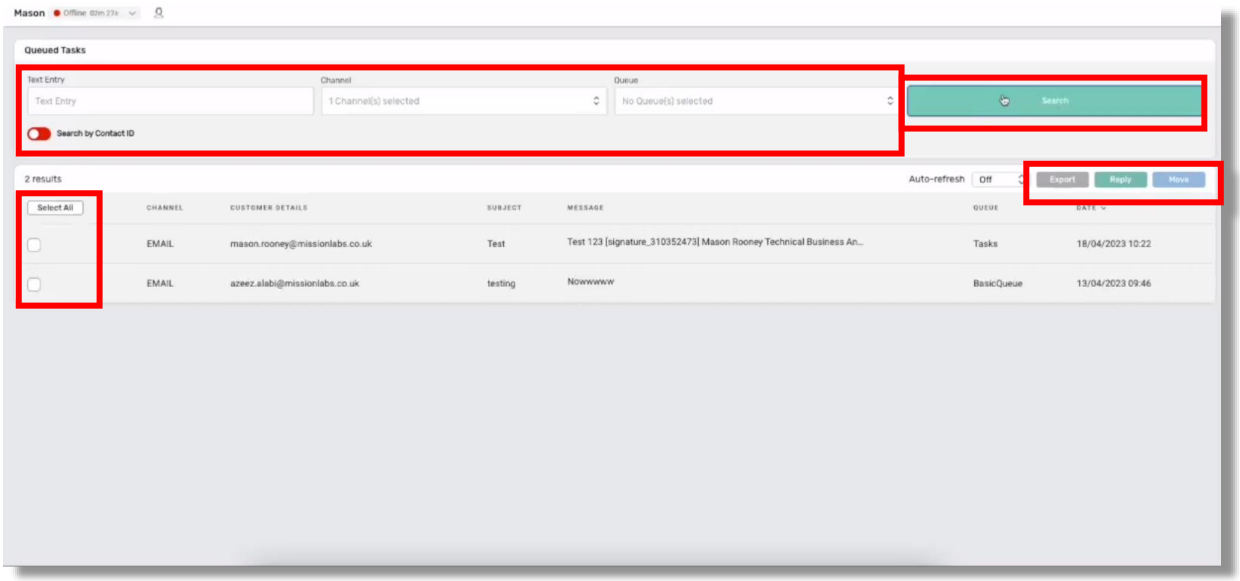
Queued tasks are normally managed by a distinct group of users, often those who may have supervisor access, so Queued Tasks is located under the metrics and data menu option



Within the Queued tasks screen you can search for a task containing particular text, from a specific channel or queue or by enabling the toggle switch to search for a specific contact ID. Once you have entered your search parameters hit the search button and the filtered results will appear in the field below.

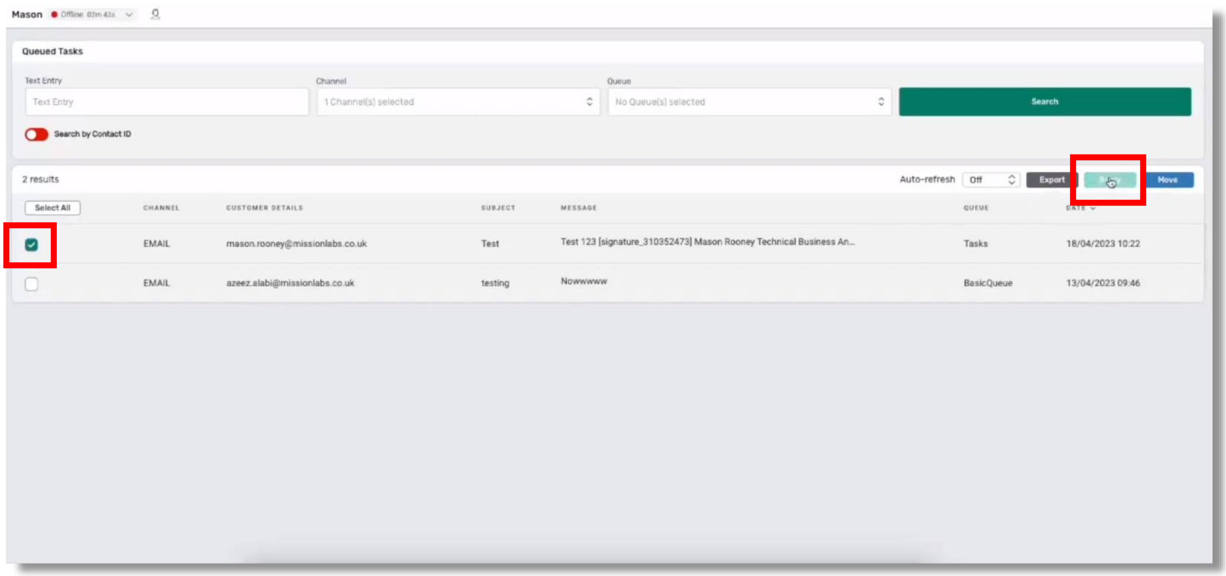
Within this field you can use the "select all" button or specific items by clicking the tickbox next to the item.

Once you have selected items you can then bulk export, move or reply to all the selected items.



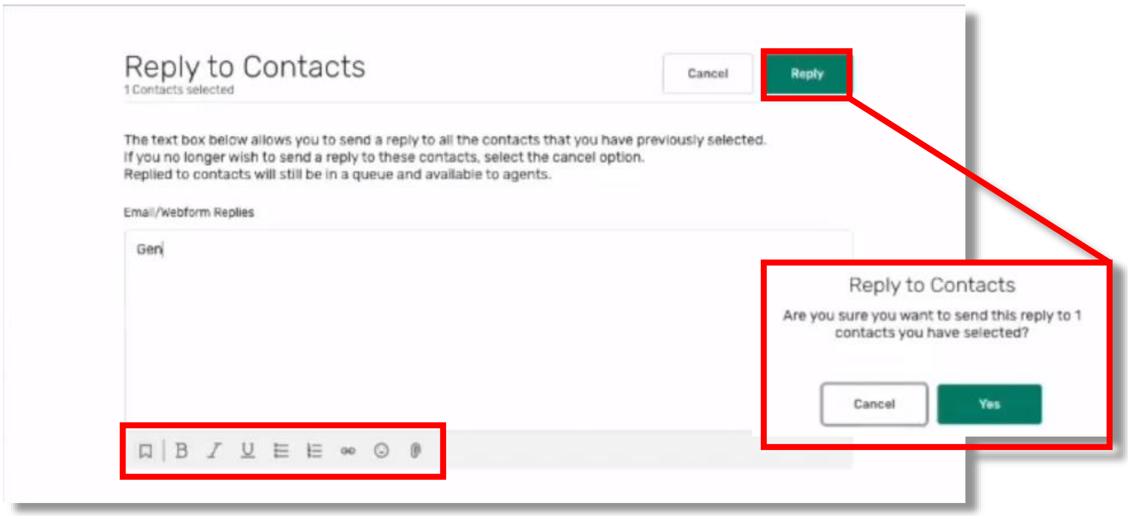
Using Queued tasks menu to reply / bulk reply

Once you selected the item or items you want to reply to select the reply button.



You will then be given a text box where you can write a response to all the selected tasks. You can access any Quick replies or formatting options. If you have been given permission you will also see the attachment icon to add attachments.

Once you select the reply button you will be asked to confirm if you want to send this reply to the



number of selected contacts.

Using Queued tasks menu to end a contact

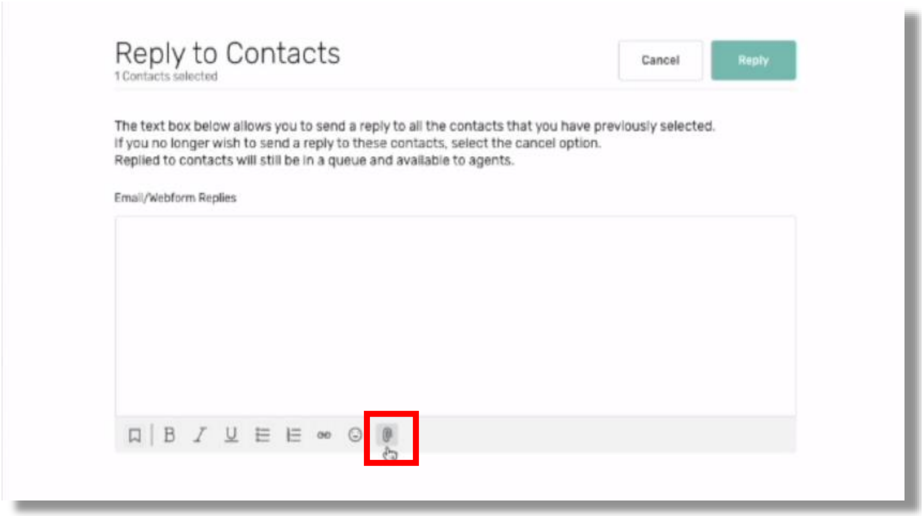
Once you have replied to contacts, if you have permission, you will be offered the opportunity to end these contacts. You can enter notes, add a reason for the contact and then choose the yes option to end the contact, or No option for the contacts to remain in the queued task list.

You will get an onscreen progress report as the selected tasks are processed and ended. This may take upto 30 seconds to complete and any errors or issues will be highlighted.

Adding an attachment to a reply in queued tasks

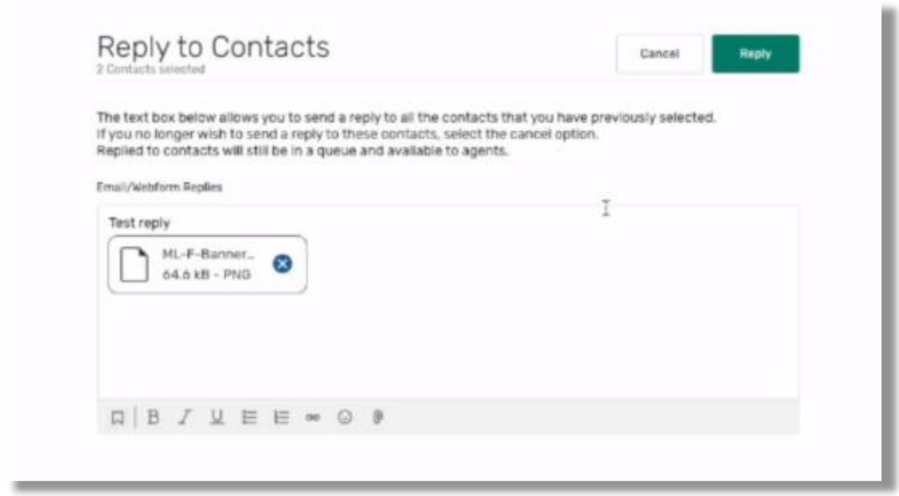
If you have the permission you can add an attachment to a either a single queued task or a number of queued tasks (bulk queued tasks). These permissions are separated, so the attachment icon will appear depending on how many tasks you have selected.

Namely if you select multiple tasks, you need to have the "bulk attachment" permission for the icon to appear. If you only have permission to just "add attachment" then this icon will only occur if you reply to one task at a time.



In order to add an attachment, select the attachment icon and search for the attachment within your file management system.

You can select multiple attachments but need to consider any capacity / file size restrictions within your mailbox settings. The attachment will show onscreen with a file icon, allowing you to check it is the correct attachment and it's size before sending out.

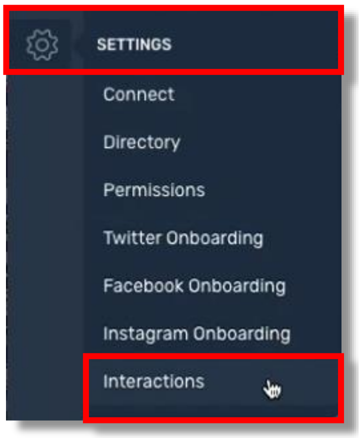


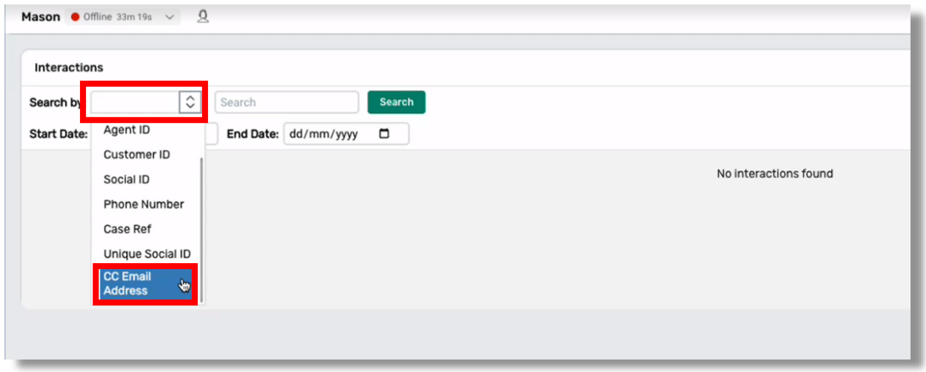
Searching for a contact with only a CC'd email address

As the Contact Search Record captures the customer and agent details it will not return a result for a contact where you enter an email address that has only been CC'd into an email rather than the primary contact.

So if you need to search for a contact based only on a cc'd email address this can be done using the Interactions search menu.

Go to Settings Menu and select Interactions. Within the interactions page select CC'd email address from the dropdown menu.

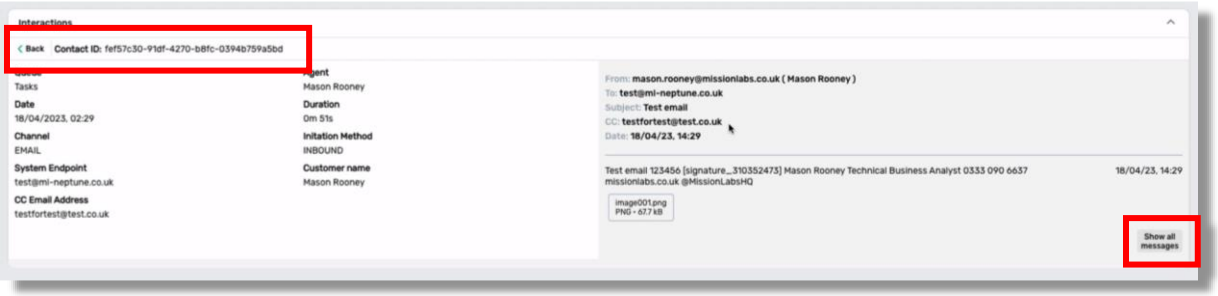




In the search field type in the email address you want to search for and click the search button.

You will then be presented with a list of all interactions involving that cc'd email address.

Click on the item to expand the details of the item you want to check.

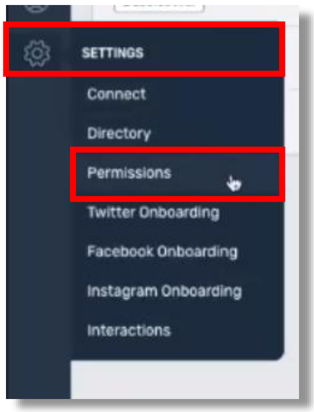


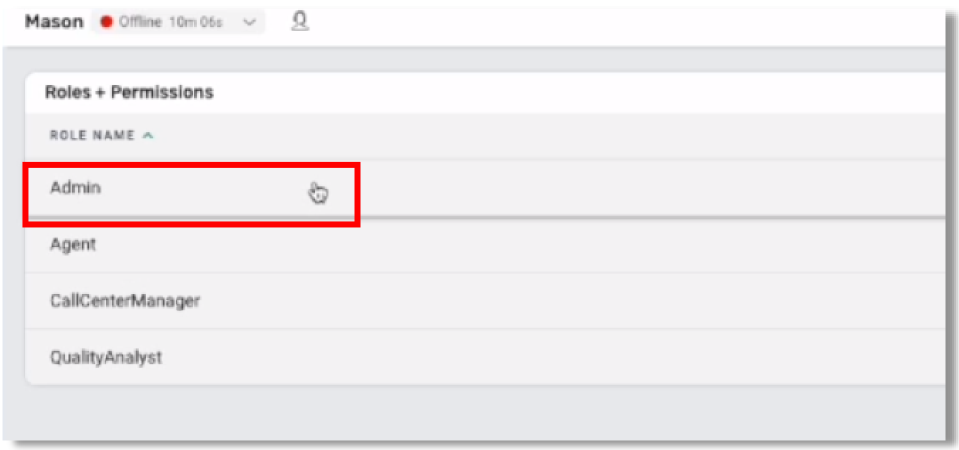
You will then have access to the details, including the CTR reference and all messages associated with that contact.

Configuration of Permissions menu to restrict access to particular Queued task functions

You can configure specific permissions in the Queued task by amending the permissions within a security profile so that for example, one security profile would allow a user to only attach a document to an individual task reply. Whereas another user might be allowed to attach a file to multiple tasks as a "bulk response"

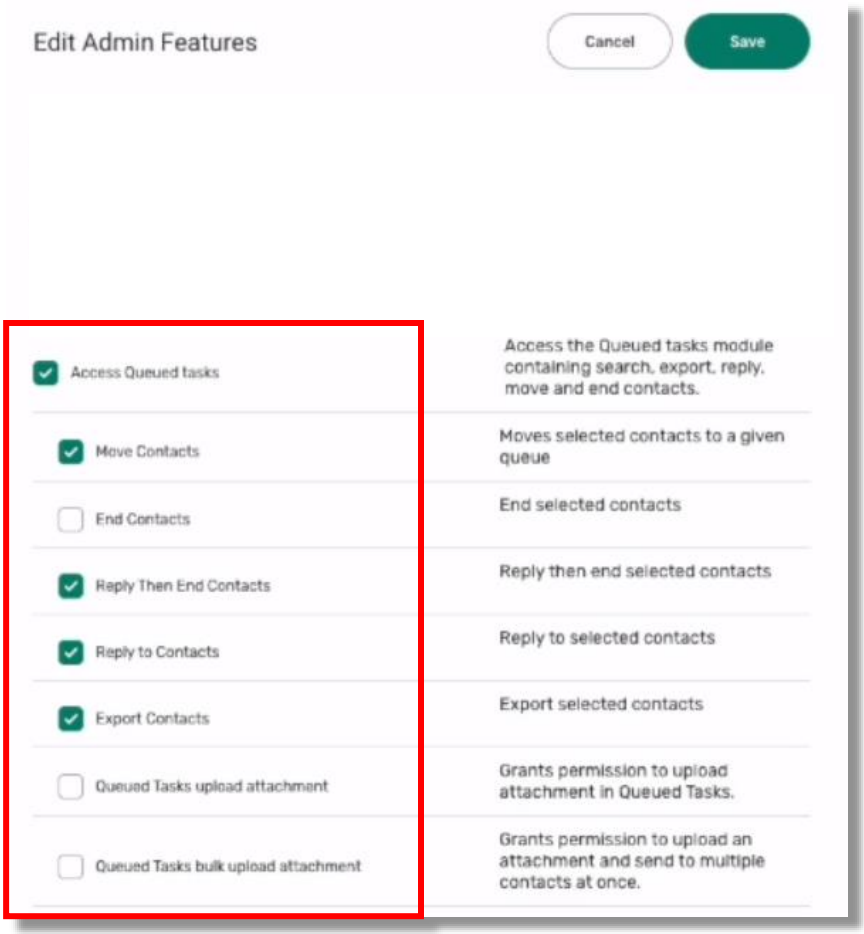
Go to Settings Menu and select Permissions. Then select the Security profile that you want to amend access from those listed.





You are then able to amend the details of the security profile to reflect the access and permissions you want them to have when dealing with Queued tasks

So they must have "Access Queued Tasks".to see the menu option for Queued tasks



"Move Contacts".allows users to move tasks to different queues.

"End Contacts" allows users end selected contacts without having to reply first.

"Reply then end contacts" users must reply and will then be prompted to end contacts.

"Reply to Contacts" allows users to reply, but they aren't asked if they want to end contacts.

"Export Contacts" allows users to export tasks.

"Queued task upload attachment" allows users to reply with attachments to only one task at a time.

"Queued task bulk upload attachment" allows users to reply to multiple tasks with attachments.

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