



CHIME

Instant Chime for Teams **ADVANCED AGENT TRAINING**



Last Update: 5/11/2022

Last Author: BM

@teaminstant | 1 (844) 330-3440 | info@instant-tech.com | www.instant-tech.com



- Agent chat settings
- Agent Chat UI Features
 - History
 - Standard replies (use default or edit)
 - Language translation
 - Notes
 - QnA
 - MetaData
- Deflection feature - Display a message or card back to the guest
- Legacy Agent dashboard



Chat Settings:

- Chat window settings are available on the agent dashboard

Notification Settings:

- Chat notification settings are available on the agent settings dropdown menu

Menu

Active Chat Sessions 0 Active Refresh

No active sessions

No Session Selected

Monitoring Panel

Session Started	Queue	Guest	Question	State	Wait Time	Connected Time	Agent	Pick Chat
No Sessions								

Last updated May 10, 2022 1:51:35 PM. Next update in 16 seconds.

End session after closing agent web client: True
 Enable agent web client's auto translate: True
 Enable agent web client's new message sound: True

Home My Guest Dashboard My Agent Dashboard My Manager Home Admin

Hello, Peyton McManus

- DoNotDisturb
- My Dashboard
- Queue Dashboards
- Cummins (Load)
- Italian Helpdesk
- SLB May2022
- Sanofi Bot Test Queue(Demo)
- Sanofi Hungarian(QA)
- Shell Testing Queue
- iSolv(QA)
- Notification Modal (ON)
- Notification Sound (OFF)
- Notification Ringtone (OFF)
- Only Display Chat Notification UI Once per Incident (OFF)

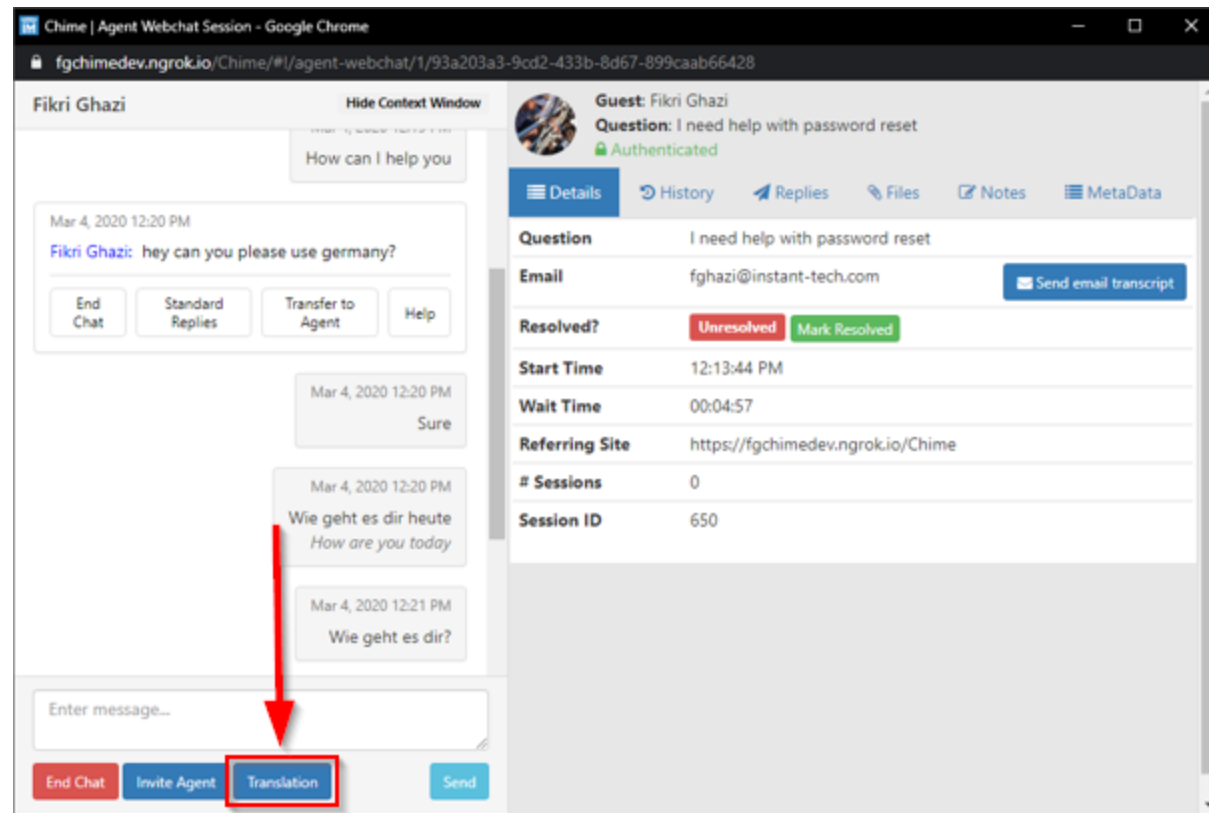
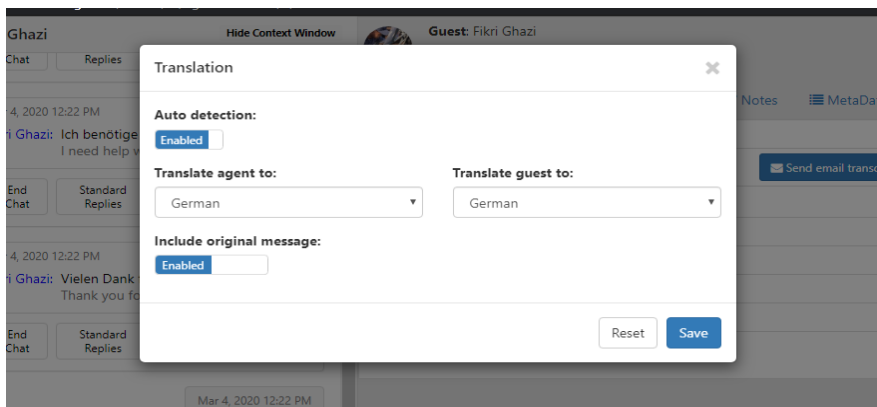
End session after closing agent web client

Enable agent web client's auto translate

Enable agent web client's new message sound

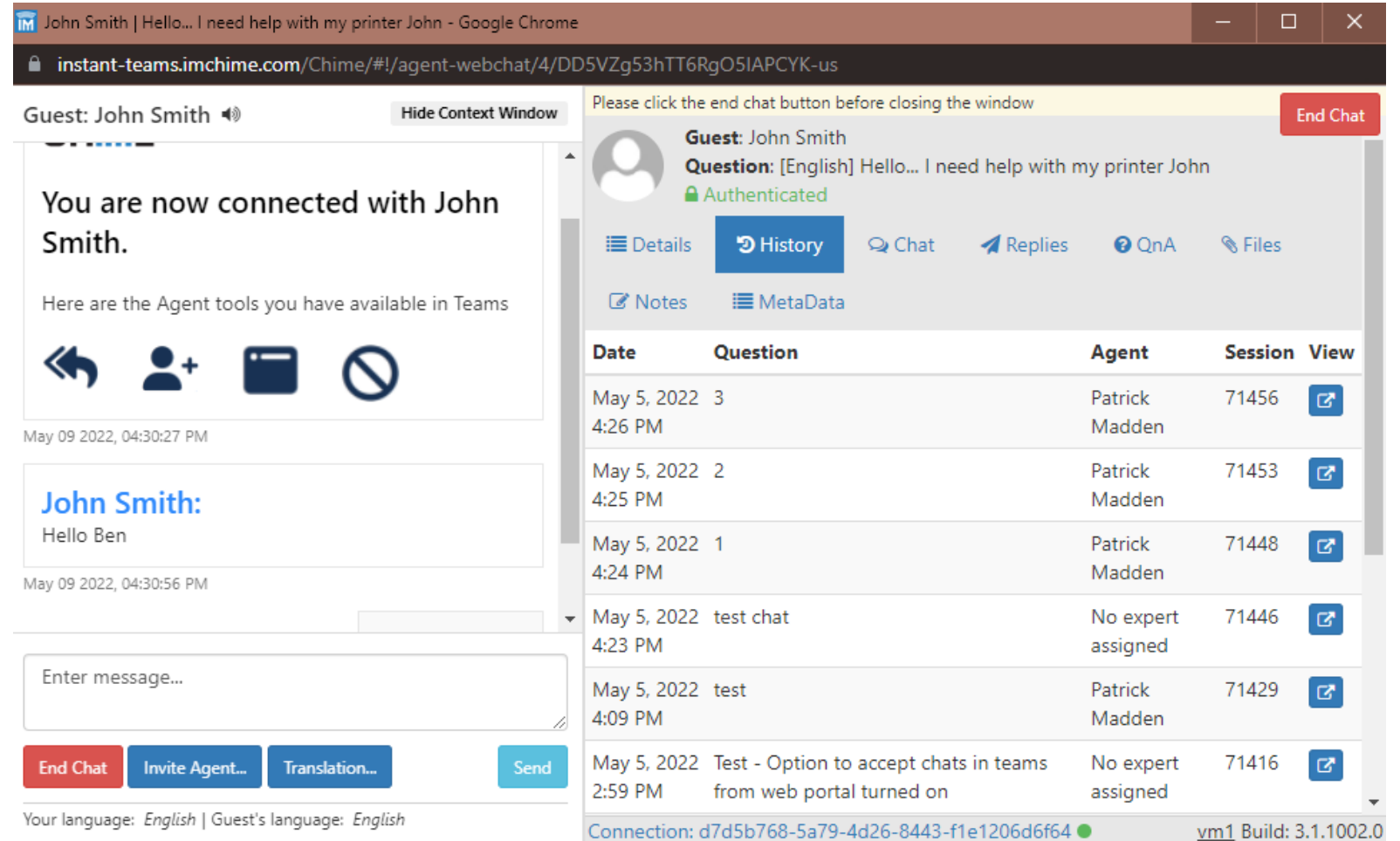
Language Translate:

- Agents may use translation on a per conversation basis
- Translation service is provided by Azure translation service and monitored and metered using Microsoft Azure



History:

- Basic information about past sessions for guest user
- Option to view past session chat transcript



The screenshot shows a web browser window with the URL `instant-teams.imchime.com/Chime/#/agent-webchat/4/DD5VZg53hTT6RgO5IAPCYK-us`. The chat interface includes a header for "Guest: John Smith" and a "Hide Context Window" button. The main chat area displays a message from John Smith: "Hello Ben" (timestamped May 09 2022, 04:30:56 PM). Below the message is an input field with the placeholder "Enter message..." and buttons for "End Chat", "Invite Agent...", "Translation...", and "Send".

On the right side, a "History" panel is open, showing a table of past chat sessions. The table has columns for Date, Question, Agent, Session, and View. The sessions listed are:

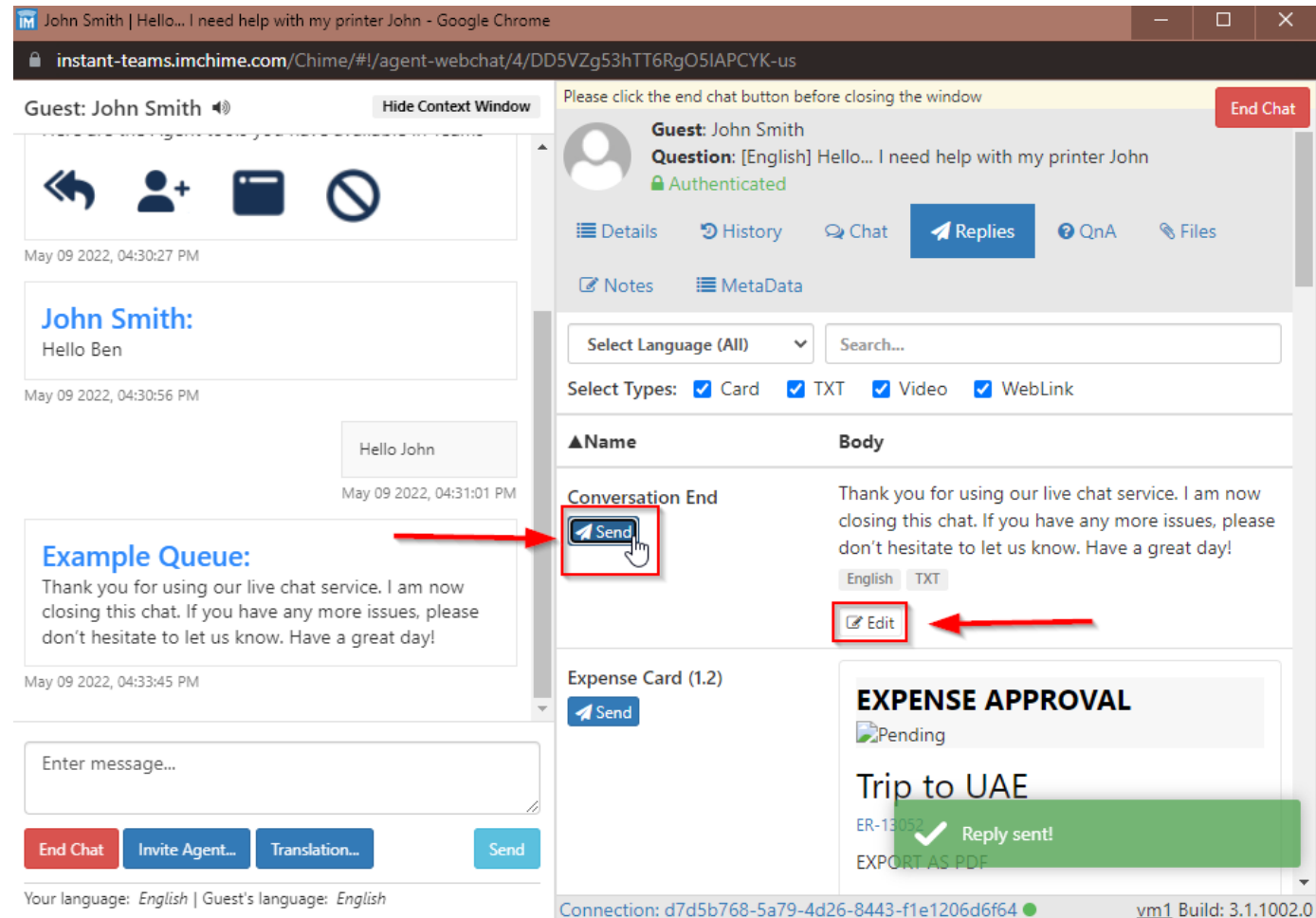
Date	Question	Agent	Session	View
May 5, 2022 4:26 PM	3	Patrick Madden	71456	View
May 5, 2022 4:25 PM	2	Patrick Madden	71453	View
May 5, 2022 4:24 PM	1	Patrick Madden	71448	View
May 5, 2022 4:23 PM	test chat	No expert assigned	71446	View
May 5, 2022 4:09 PM	test	Patrick Madden	71429	View
May 5, 2022 2:59 PM	Test - Option to accept chats in teams from web portal turned on	No expert assigned	71416	View

At the bottom of the history panel, there is a connection ID: `d7d5b768-5a79-4d26-8443-f1e1206d6f64` and build information: `vm1 Build: 3.1.1002.0`.

Agent Context Window - Replies

Standard Replies:

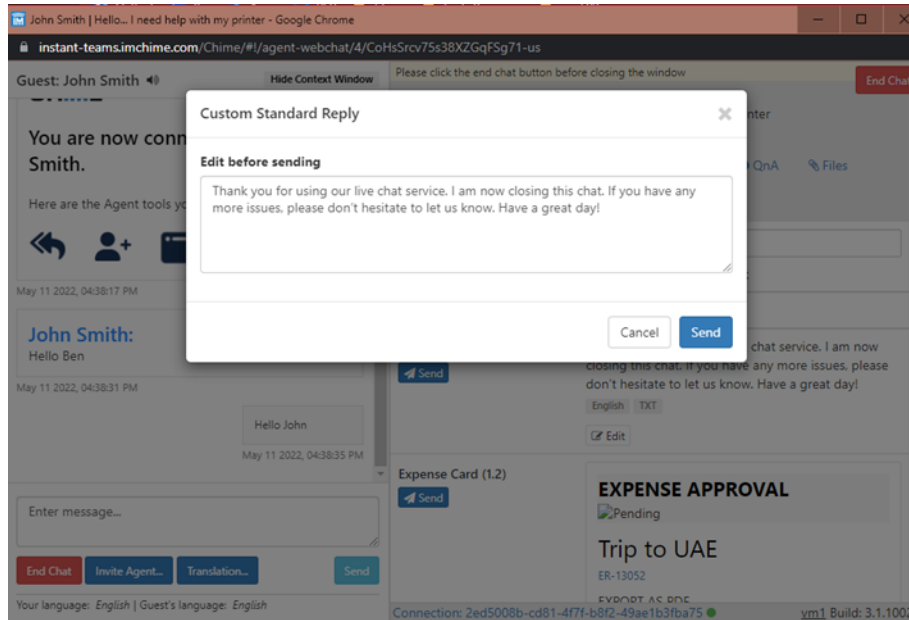
- Premade messages for Agent
- Select send button on one of the listed replies
- Replies can be edited before being sent
- Standard replies must be added to Queue Settings by a Manager or Administrator



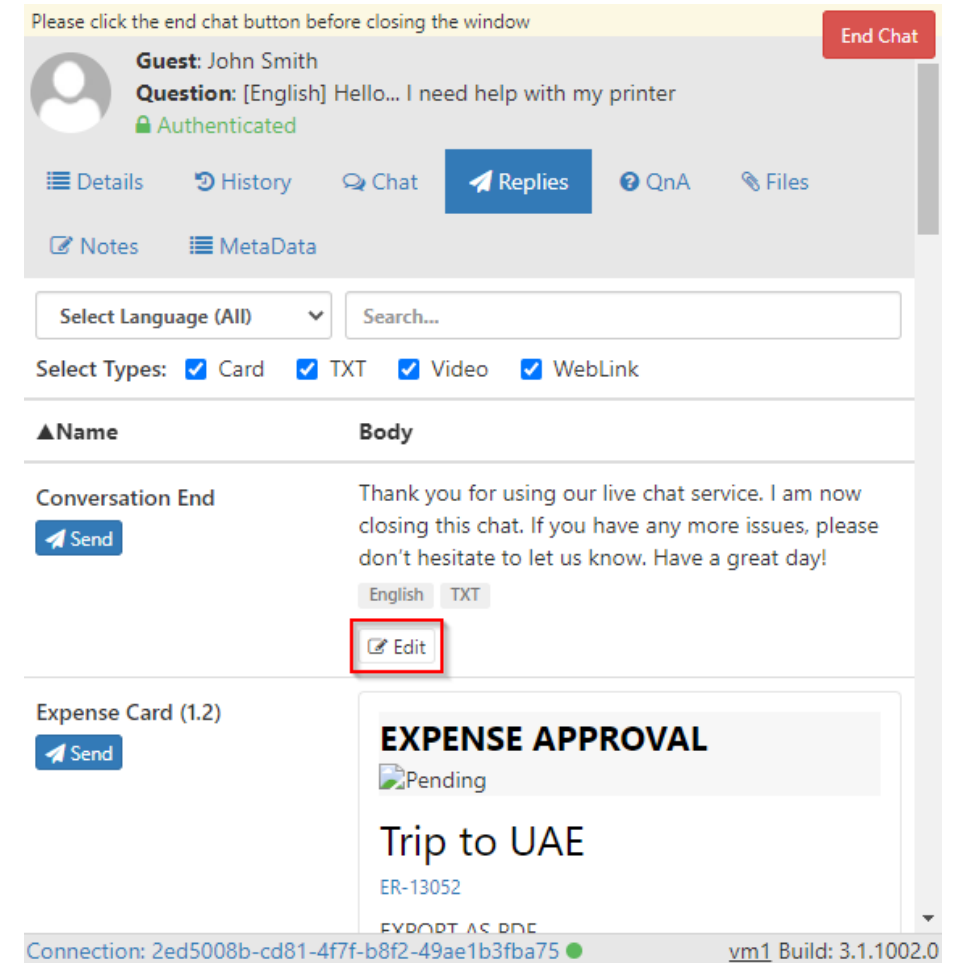
The screenshot displays the CHIME webchat interface. On the left, a chat window shows a conversation with 'John Smith'. The chat history includes messages from the guest and the agent. The agent's response is highlighted, and a red arrow points to the 'Send' button next to it. On the right, the 'Agent Context Window' is open, showing a list of replies. The first reply is 'Conversation End' with a body text: 'Thank you for using our live chat service. I am now closing this chat. If you have any more issues, please don't hesitate to let us know. Have a great day!'. This reply is selected, and a red arrow points to the 'Edit' button next to it. Below the list, there is an 'Expense Card (1.2)' section with a 'Send' button. At the bottom of the context window, a green notification bar says 'Reply sent!' with a checkmark and 'EXPORT AS PDF' link. The interface also includes a search bar, language selection, and various navigation buttons like 'Details', 'History', 'Chat', 'Replies', 'QnA', and 'Files'.



Edit Replies:
Agents can edit standard replies
before sending to guest



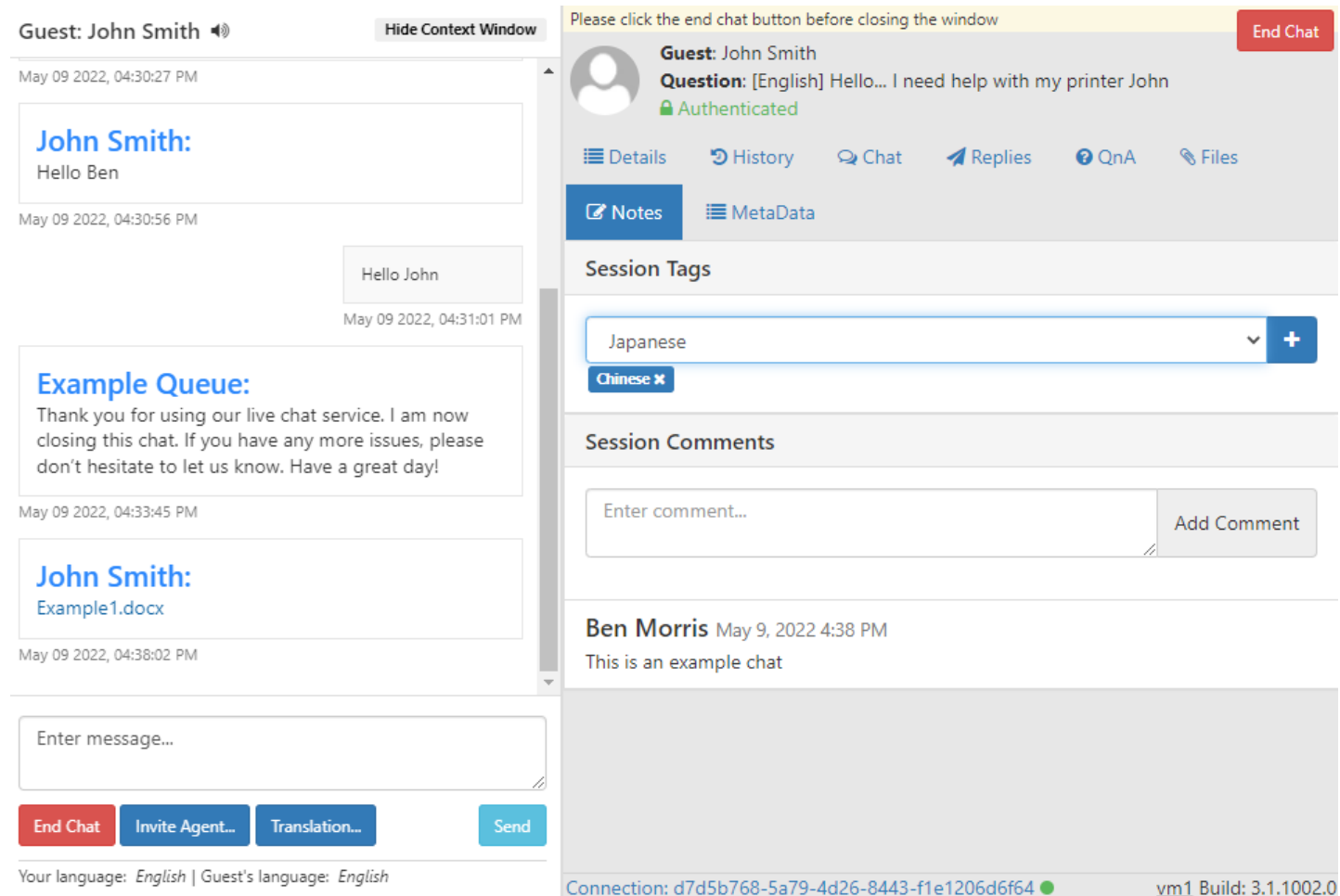
Edit Standard Replies



Agent Context Window - Notes

Session Notes:

- Agents can attach session tags such as 'Japanese' or 'Resolved Issue'
- Agents can write session comments for additional information

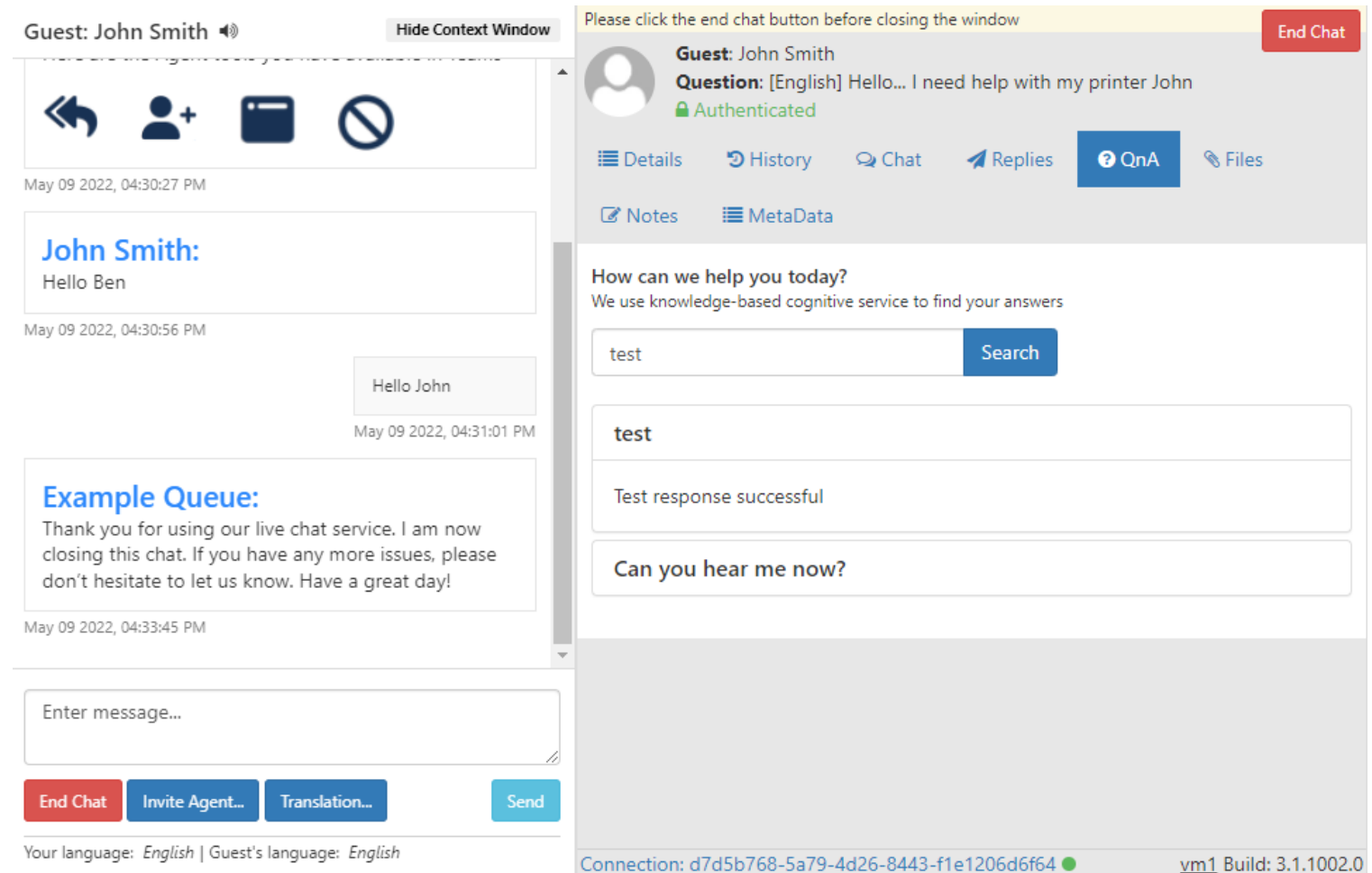


The screenshot displays the CHIME agent interface. On the left, a chat window shows a guest message from John Smith: "Hello Ben" (May 09 2022, 04:30:27 PM). Below it, a session note is visible: "John Smith: Hello Ben" (May 09 2022, 04:30:56 PM). Another message from John Smith follows: "Hello John" (May 09 2022, 04:31:01 PM). A second session note is shown: "Example Queue: Thank you for using our live chat service. I am now closing this chat. If you have any more issues, please don't hesitate to let us know. Have a great day!" (May 09 2022, 04:33:45 PM). A third message from John Smith is attached to a document: "John Smith: Example1.docx" (May 09 2022, 04:38:02 PM). The chat input field contains "Enter message...". At the bottom, buttons for "End Chat", "Invite Agent...", "Translation...", and "Send" are visible. The language is set to English for both the agent and the guest.

On the right, the agent's context window is shown. It includes a "Hide Context Window" button and a warning: "Please click the end chat button before closing the window". The guest information is: "Guest: John Smith", "Question: [English] Hello... I need help with my printer John", and "Authenticated". Navigation options include "Details", "History", "Chat", "Replies", "QnA", and "Files". The "Notes" tab is active, showing "Session Tags" with "Japanese" and "Chinese" selected. Below that is a "Session Comments" section with an input field "Enter comment..." and an "Add Comment" button. The chat history shows a message from "Ben Morris" on May 9, 2022 at 4:38 PM: "This is an example chat". At the bottom, the connection ID is "d7d5b768-5a79-4d26-8443-f1e1206d6f64" and the build version is "vm1 Build: 3.1.1002.0".

Question and Answer:

- Access to knowledge base
- Knowledge base must be added by a Manager or Administrator by queue



The screenshot displays two overlapping windows from the CHIME chat interface. The left window is a chat window for a guest named John Smith. It shows a message history with three messages: a greeting from John Smith at 04:30:27 PM, a response from Ben at 04:30:56 PM, and a closing message from Ben at 04:33:45 PM. The chat window includes a 'Hide Context Window' button and a 'Send' button. The right window is a QnA context window. It features a search bar with the text 'test' and a 'Search' button. Below the search bar, it displays the results: 'test' and 'Test response successful'. The QnA window also includes a 'Can you hear me now?' section and a 'Connection' status at the bottom.



Agent Context Window - MetaData

Session MetaData – View additional information

- Entry Point
- RefferrerURL
- Skill tags
- Etc.

Guest: John Smith Hide Context Window

May 09 2022, 04:30:27 PM

John Smith:
Hello Ben

May 09 2022, 04:30:56 PM

Hello John

May 09 2022, 04:31:01 PM

Example Queue:
Thank you for using our live chat service. I am now closing this chat. If you have any more issues, please don't hesitate to let us know. Have a great day!

May 09 2022, 04:33:45 PM

John Smith:
Example1.docx

May 09 2022, 04:38:02 PM

Enter message...

End Chat Invite Agent... Translation... Send

Your language: *English* | Guest's language: *English*

Please click the end chat button before closing the window End Chat

Guest: John Smith
Question: [English] Hello... I need help with my printer John
Authenticated

Details History Chat Replies QnA Files

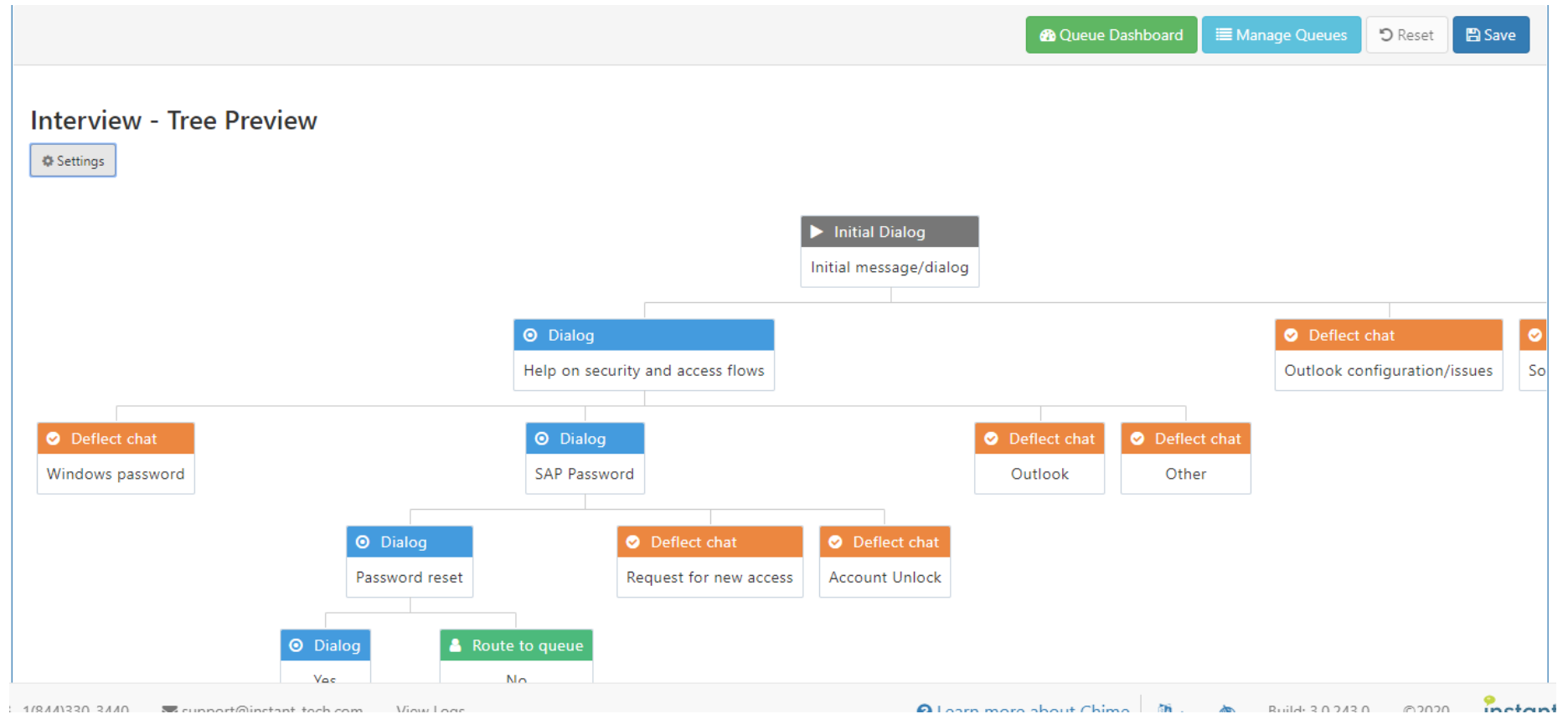
Notes MetaData

Key	Value
chatType	WebClient
chimeWebClient	True
domainAuthenticated	True
email	john.smith@instant-tech.com
entryPoint	Queue-Dispatcher-1@1oquBt9OiMA
firstName	John
hostname	c-24-34-46-8.hsd1.nh.comcast.net
ip	24.34.46.8
lastName	Smith
platform	Win32
samaccountname	bmorris@instant-tech.com

Connection: d7d5b768-5a79-4d26-8443-f1e1206d6f64 ● vm1 Build: 3.1.1002.0

Interviews allow user chat interaction 'work-flows' or decision trees to be attached at the queue level

When going through the chat interview workflow the chat status shown in the agent dashboard will change to reflect



- Option to deflect incoming chat sessions
- Automatically (for some managed shutdown of queue)
- Based on conditions (Razor with variables)
 - Too many waiting guests
 - Not enough agents
 - Time of day
- Display a message or card back to the guest
- Attach a comment automatically to the session

Auto-Deflection Settings

No Automatic Deflection

Deflect All Chats

Conditionally Deflect Chats

Chat will deflect if this expression evaluates to True

```
@{
//Deflection based on total session count
var deflect = false;
var totalsessions = @Model.TotalSessionCount;

if(totalsessions > 30)
    deflect = true;
}
```

@deflect

Deflection Feature

Message When Chat is Automatically Deflected

Chat Has Been Automatically Deflected

There are currently too many people waiting

There are already @Model.TotalSessionCount people ahead of you in line. Please come back later when the service desk has more availability

We have your initial question and email to follow up with you. If you would like to enter a longer question, please enter it below

Please enter your question here

Submit

Auto-Deflection Comment

Comment Recorded in Chat Session Metadata When Automatically Deflected

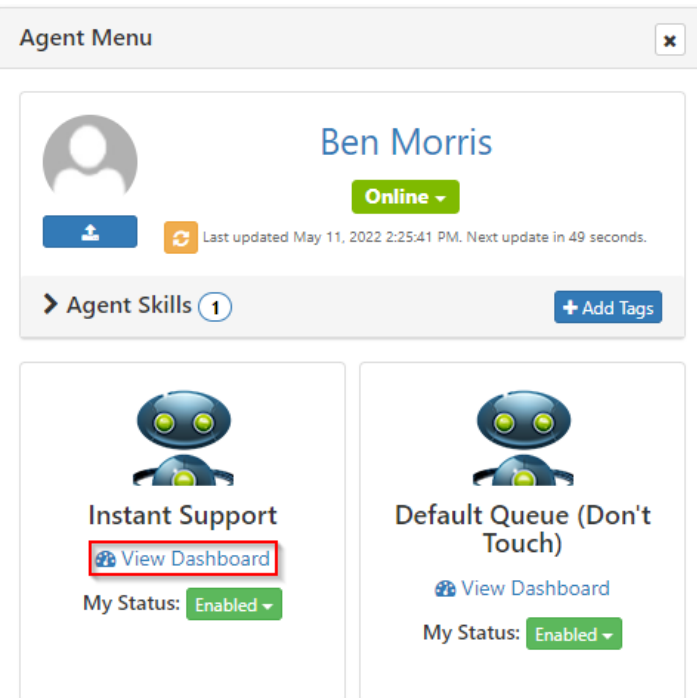
User @Model.SeekerFullName (@Model.SeekerEmail) came in at (@Model.CurrentTime) asking: @Model.SeekerQuestion while there were already @Model.TotalSessionCount users in the queue

If you are enabling auto-deflection to deal with increased chat volumes because of a known issue, consider creating an Outage message to help inform users about current conditions.

Create Outage

Legacy Dashboard:

- Shows more information on single page
- Shows agent statistics & history by queue



Agent Menu

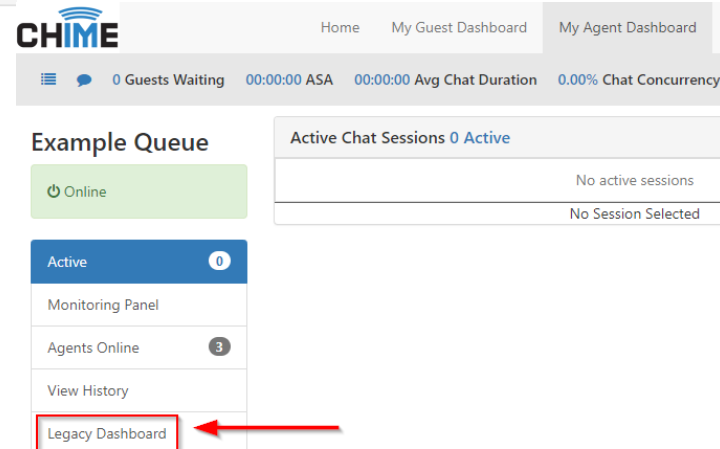
Ben Morris
Online

Last updated May 11, 2022 2:25:41 PM. Next update in 49 seconds.

Agent Skills 1

Instant Support
View Dashboard
My Status: Enabled

Default Queue (Don't Touch)
View Dashboard
My Status: Enabled



CHIME

Home My Guest Dashboard My Agent Dashboard

0 Guests Waiting 00:00:00 ASA 00:00:00 Avg Chat Duration 0.00% Chat Concurrency

Example Queue

Active Chat Sessions 0 Active

Online

No active sessions
No Session Selected

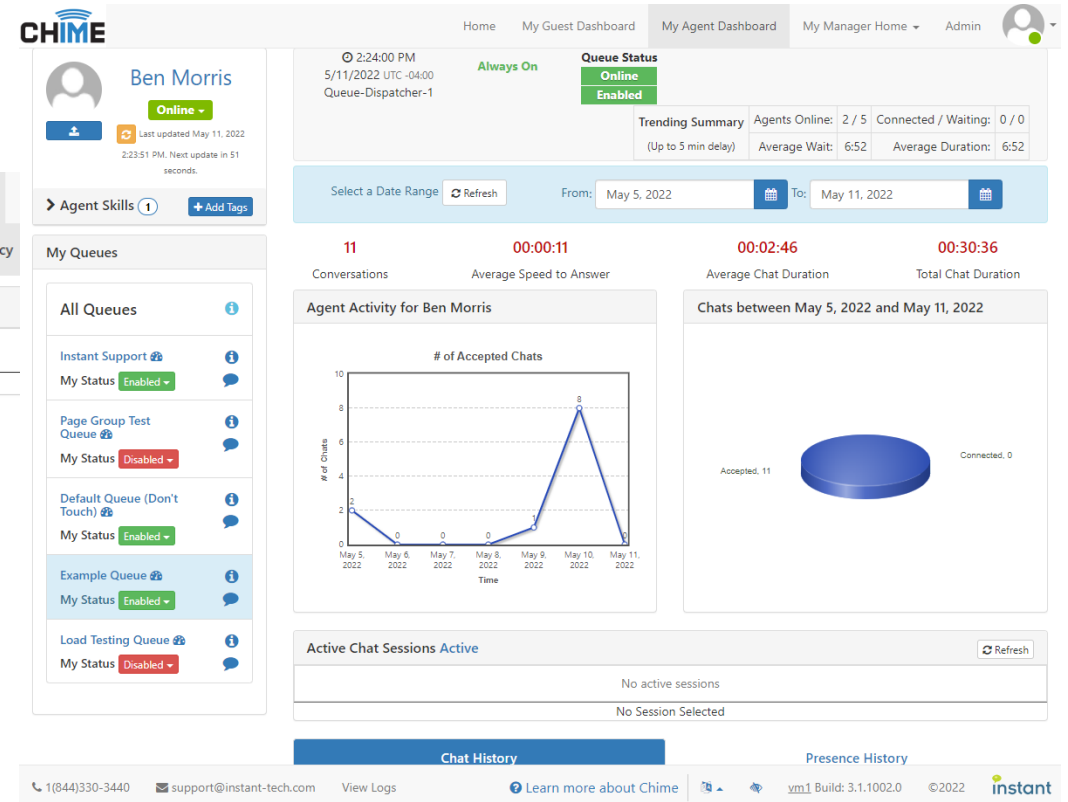
Active 0

Monitoring Panel

Agents Online 3

View History

Legacy Dashboard



CHIME

Home My Guest Dashboard My Agent Dashboard My Manager Home Admin

Ben Morris
Online
Last updated May 11, 2022 2:23:51 PM. Next update in 51 seconds.

Queue Status: Always On, Online, Enabled

Trending Summary: Agents Online: 2 / 5, Connected / Waiting: 0 / 0
Average Wait: 6:52, Average Duration: 6:52

Select a Date Range Refresh From: May 5, 2022 To: May 11, 2022

11 Conversations, 00:00:11 Average Speed to Answer, 00:02:46 Average Chat Duration, 00:30:36 Total Chat Duration

Agent Activity for Ben Morris: # of Accepted Chats (Line Graph)

Chats between May 5, 2022 and May 11, 2022: Accepted: 11, Connected: 0 (Pie Chart)

Active Chat Sessions Active: No active sessions, No Session Selected

Chat History Presence History

1(844)330-3440 support@instant-tech.com View Logs Learn more about Chime vm1 Build: 3.1.1002.0 ©2022 instant



- Search for standard replies
- Agents can edit standard replies before sending to guest
- Agent chat window footer includes:
 - Chime build number
 - Machine hosting Chime
 - SignalR session ID



CHIME

Additional Resources

- For additional support please contact: support@instant-tech.com
- For additional information go to our page: <https://www.addchime.com/team-agent-training.html>