



CHIME

Instant Chime for Teams **BASIC AGENT TRAINING**



Last Update: 5/11/2022

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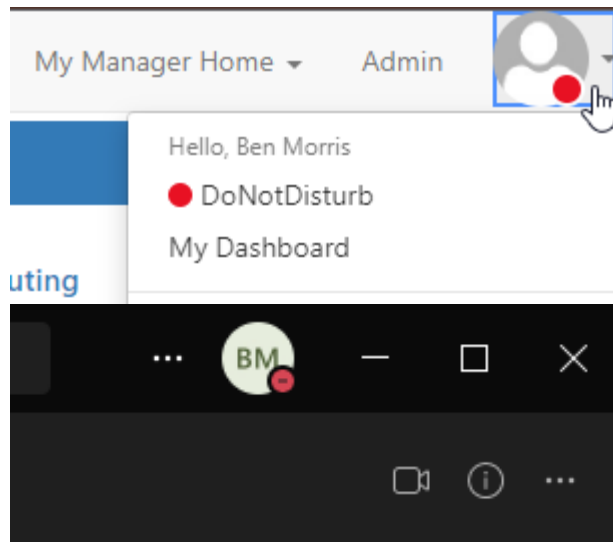
instant



- Chime UI for agent
- Guest Interaction/UI
 - Chat interview/workflow
- Accepting a chat
 - Agent status, active sessions, agent dashboard
- Agent UI
 - Details
 - Chat transcript
 - Upload files/Screenshots
 - Invite additional agent

- Agent login – login to Chime on web and login to Teams
- Accept a chat – Queue channel, Agent Dashboard, Browser pop-up notification
- Update agent status (Teams presence & Agent Dashboard menu)
- Agent ends a chat

- Agent status can be updated via Teams presence or enabled/disabled in the agent dashboard menu.
- Agents need online/enabled status to receive notification both on Teams and browser



The CHIME Agent Dashboard for Ben Morris. The dashboard shows the agent's name, status (Online), and last updated time. It features an 'Agent Skills' section with four skill cards: 'Instant Support' (Enabled), 'Page Group Test Queue' (Disabled), 'Default Queue (Don't Touch)' (Enabled), and 'Example Queue' (Enabled). A table on the right shows the agent's current state and session details.

State	Wait Time	Connected Time	Agent	Pick Chat
Connected	00:00:49	01:21:47	Fikri Ghazi	

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



CHIME

We are using adaptive cards as new text resource option to provide more descriptive options

CHIME logo and chat interface. The interface includes a header with the CHIME logo and an 'End Chat' button. Below the header, there are input fields for names (Ben, Morris) and an email address (bmorris@instant-tech.com). A text area contains the message 'Hello... I need help with my printer'. Below the text area, there is a link 'OR: Please search our Knowledge Base' and a blue 'Start Chat' button with a mouse cursor hovering over it. At the bottom, there is a 'Just now' timestamp and a 'Type your message' input field.

Chat history list with the following entries:

- Eric Richards 2/26: They are bristling a little bit that things th...
- IT Service Desk 6/6: Sent a card
- Service Desk Europe 7/10: Unfortunately, there are no agents availa...
- Vivek Garg 12/23: Hi Good Afternoon!
- Patrick Madden 2/4: You: and then I'll show the dashboards
- Chime Helpdesk 2/21: Expert Peyton McManus has closed their ...
- Recent
- InstantDemo 11:42 AM: Sent a card
- Discussion and status 3/4: You: I wil invite you
- Jake Kelley 3/3: You: it's crazy - the market sent a signal th...
- Fikri Ghazi 3/3: Seems like we are having issue with webex
- fgchimedev 2/20: Sent a card
- fgchimedev2 2/20: Sent a card
- ChimeHelpdesk-Test2 2/20: Expert Peyton McManus has closed their ...
- Eric, Jake, Patrick, +2 2/19: Eric: Still going with Sanofi, they are tr...

Guest Chat UI

Guest chat UI showing an adaptive card. The card is titled 'InstantDemo 11:40 AM' and contains the following content:

- Welcome to the help desk**
- Your first name: Peyton
- Please provide additional details about your request. If your request looks accurate, then just click continue
- I need my password reset please
- Continue

Below the card, there is a message: 'Thank you for contacting Ternium's Chat support. Please select what can we help you with?' followed by a dropdown menu 'Select an option' and a 'Submit' button.

At the bottom, there is a text input field 'Type your questions here' and a row of icons for chat actions.

- Agent Teams presence will need to be set to online to be actively notified
- For browser notifications agents will need to be logged into the Chime UI
- Agents notified via MS Teams Channel
 - Notify in form a card (could be customized) and allow agent to accept
 - Chat then 1 to 1 with guest and bot is in the middle
- Agents may also monitor via new tab – displays waiting guests
 - Agents may pick guest from waiting list
 - Chat is then 1 to 1 with guest and bot is in the middle

Accept a Chat using Web UI

Accept chats in Agent Dashboard or web pop-up

Incoming Session from Queue: Example Queue

Ben Morris

Waiting

Waiting Time
00:00:01

Question:
Hello... I need help with my printer

How would you like to accept the chat?

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
72489	May 9, 2022 4:02 PM	Instant Support	Ben Morris		Waiting	00:00:08			<input checked="" type="button" value="Pick Chat..."/>

Refresh Last updated May 9, 2022 4:03:51 PM. Next update in 52 seconds.

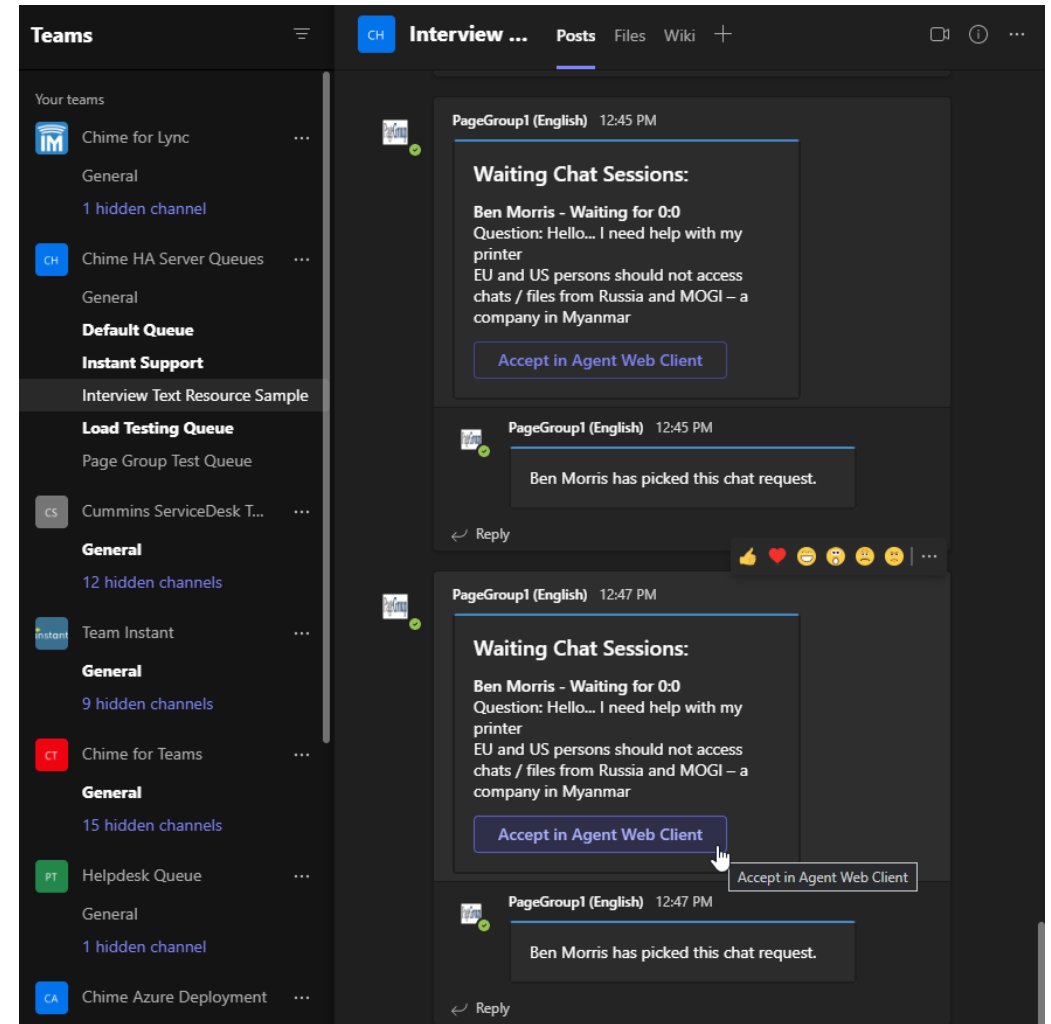
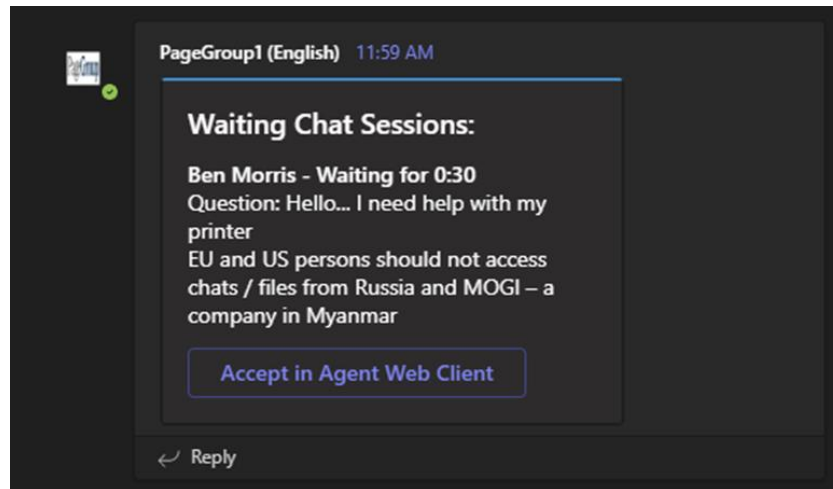
End session after closing agent web client: True

Enable agent web client's auto translate: True

Enable agent web client's new message sound: True

Accept a Chat using Teams UI

Agents using the Teams client will be added to the Team and channel for any queues they are in





Agent accepts notification → Chat Loading → Agent opens chat

Incoming Session from Queue: Example Queue

Ben Morris

Waiting

Waiting Time
00:00:12

Question:
Hello... I need help with my printer

How would you like to accept the chat?

✓ WEB CLIENT ✗ DECLINE

Initiating session

Checking session's state... **Success**

Checking if session is already connected... **Success**

Activating current session...

Guest: Ben Morris

CHIME

You are now connected with Ben Morris.

Here are the Agent tools you have available in Teams

May 10 2022, 02:03:18 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

Guest: Ben Morris
Question: [English] Hello... I need help with my printer
Authenticated

Details History Chat Replies QnA Files

Notes MetaData

Question: [English] Hello... I need help with my printer

Email: bmorris@instant-tech.com Send email transcript

Resolved? **Unresolved** Mark Resolved

Start Time: 2:03:00 PM

Wait Time: 00:00:06

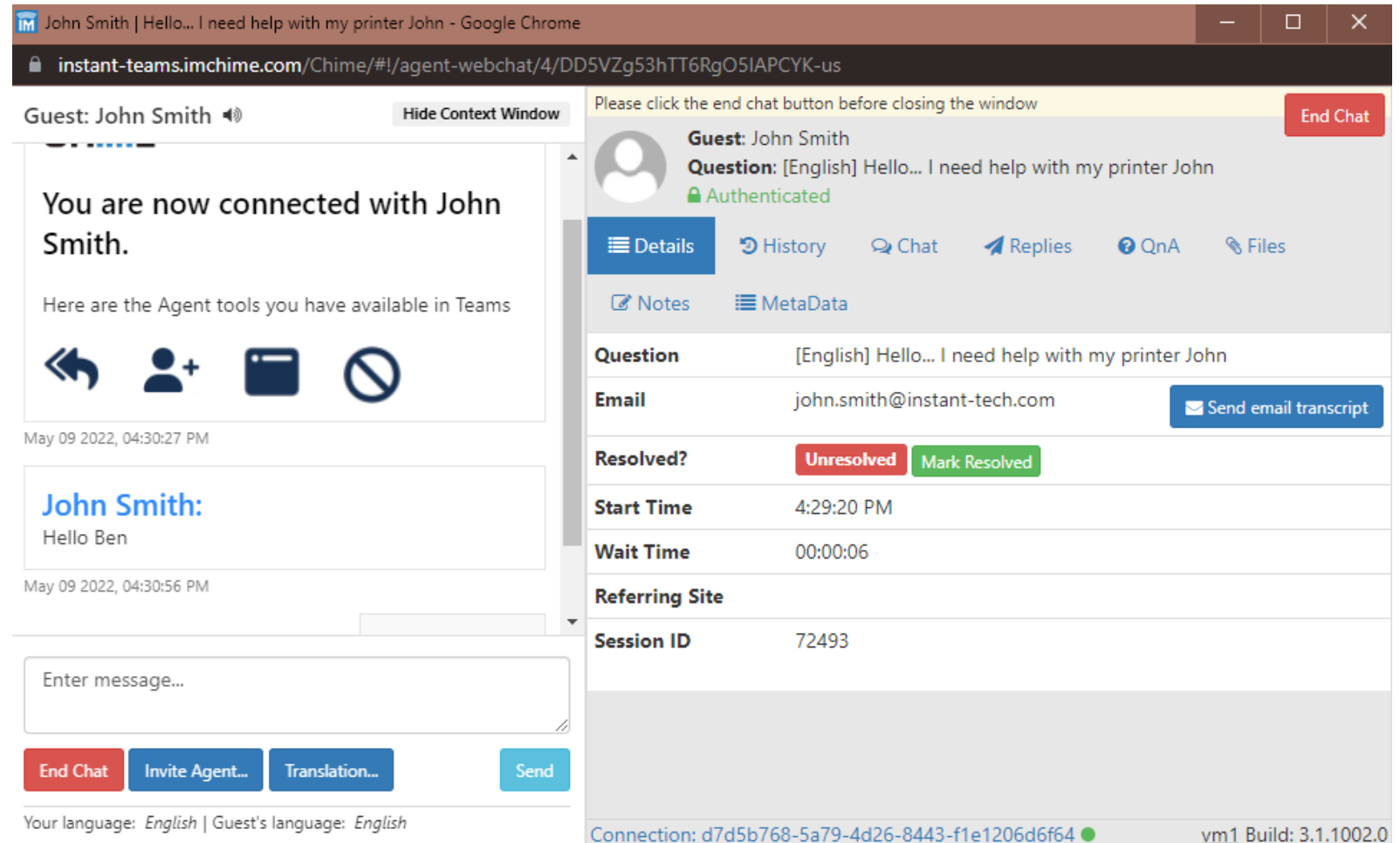
Referring Site

Session ID: 72510

Connection: f452da56-24ad-4661-b7af-165eb29ac199 vm1 Build: 3.1.1002.0

Basic User & Session Details:

- Full Name
- Question
- Contact Information
- Wait Time
- Session ID



The screenshot displays the CHIME Agent Chat interface. The main chat window shows a message from John Smith: "Hello Ben". Below the message is a text input field with the placeholder "Enter message..." and buttons for "End Chat", "Invite Agent...", "Translation...", and "Send".

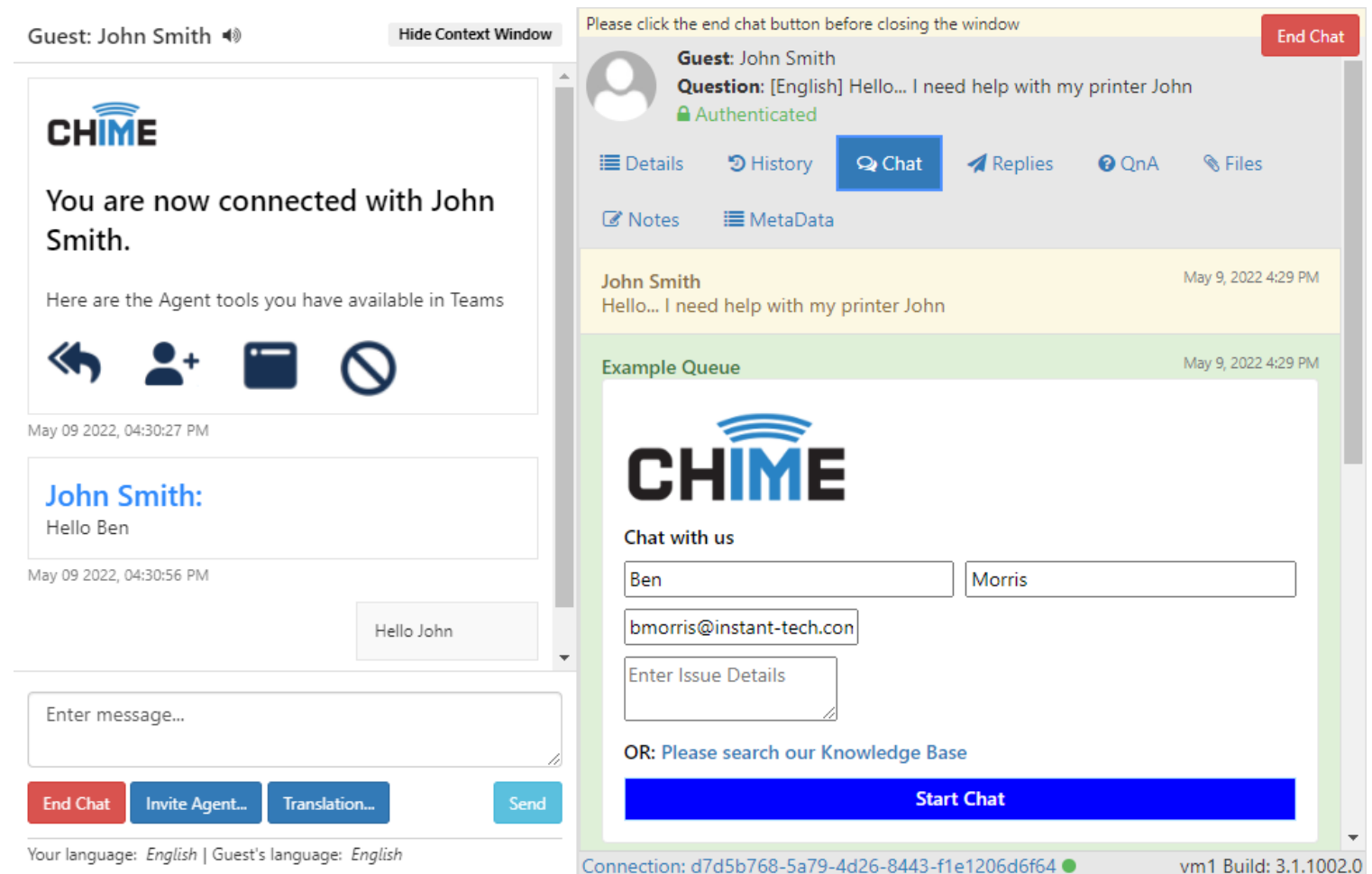
The details sidebar on the right provides the following information:

- Guest:** John Smith
- Question:** [English] Hello... I need help with my printer John
- Resolved?:** Unresolved (with a "Mark Resolved" button)
- Start Time:** 4:29:20 PM
- Wait Time:** 00:00:06
- Referring Site:** (empty)
- Session ID:** 72493

At the bottom of the sidebar, the connection ID is shown as "d7d5b768-5a79-4d26-8443-f1e1206d6f64" and the build version is "vm1 Build: 3.1.1002.0".

Chat history of current chat session:

- Review past workflow
- Pre-chat information



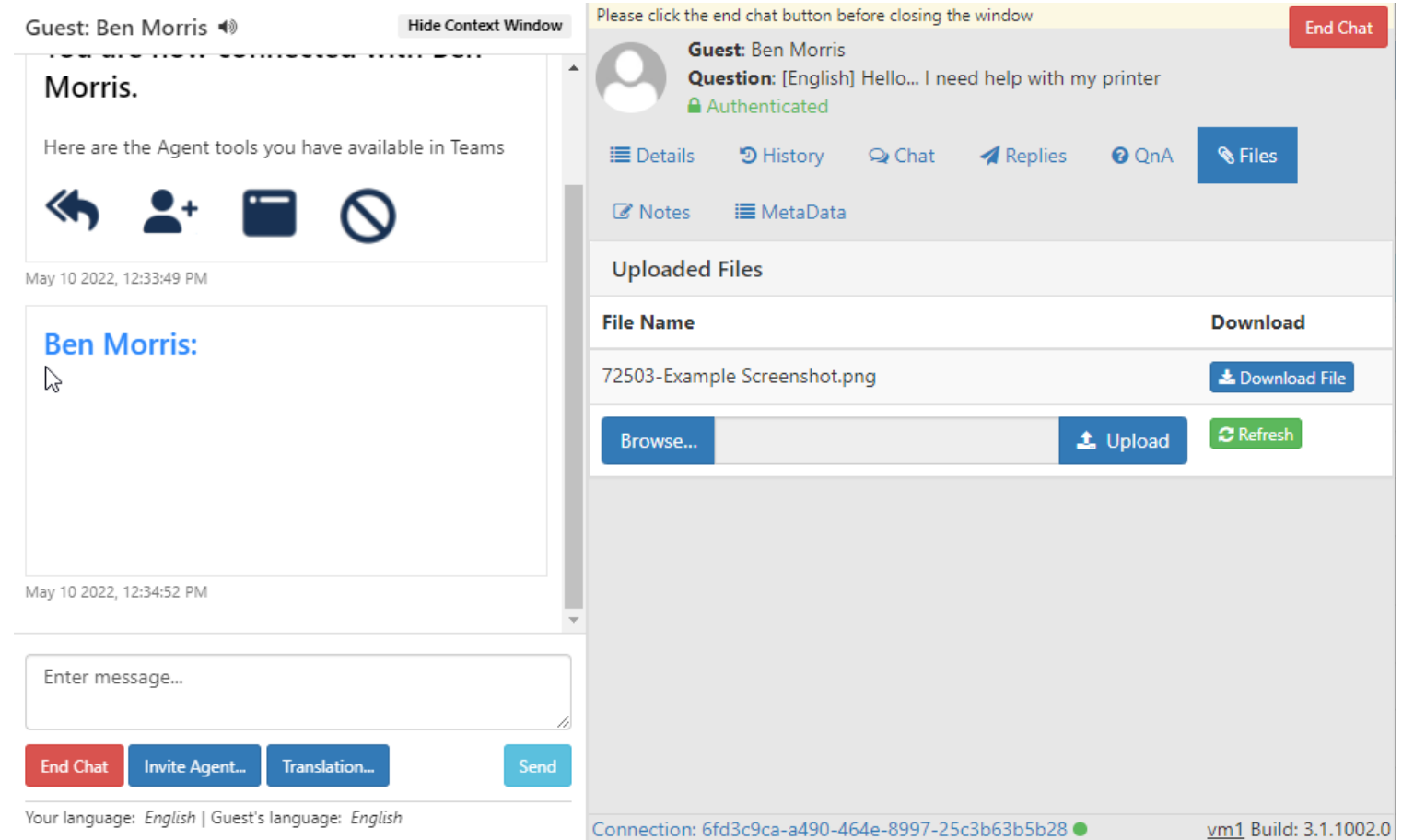
The screenshot displays the CHIME Agent Chat interface. On the left, a chat window shows a message from John Smith: "Hello Ben" (sent May 09, 2022, 04:30:56 PM) and a response "Hello John" (sent May 09, 2022, 04:30:27 PM). The chat window includes a "Hide Context Window" button and a "Send" button. Below the chat window, there are buttons for "End Chat", "Invite Agent...", and "Translation...".

On the right, a pre-chat form is shown. It includes a "Please click the end chat button before closing the window" warning, a "Guest: John Smith" header, and a "Question: [English] Hello... I need help with my printer John" field. The form also displays "Authenticated" status and navigation options: Details, History, Chat, Replies, QnA, and Files. Below these are "Notes" and "MetaData" options. The form shows a message from John Smith: "Hello... I need help with my printer John" (sent May 9, 2022 4:29 PM). An "Example Queue" section shows the CHIME logo and a "Chat with us" form with fields for "Ben" (value: Ben), "Morris" (value: Morris), and "bmorris@instant-tech.com". There is also an "Enter Issue Details" field and a "Start Chat" button. At the bottom, it says "OR: Please search our Knowledge Base" and "Connection: d7d5b768-5a79-4d26-8443-f1e1206d6f64" and "ym1 Build: 3.1.1002.0".

Agent Chat UI – Files/Screenshots

Session Files:

- Shows all files sent during session
- Agents can browse and upload files in this tab to send to guest user
- Screenshots will show within the chat and will be available for download in the files tab

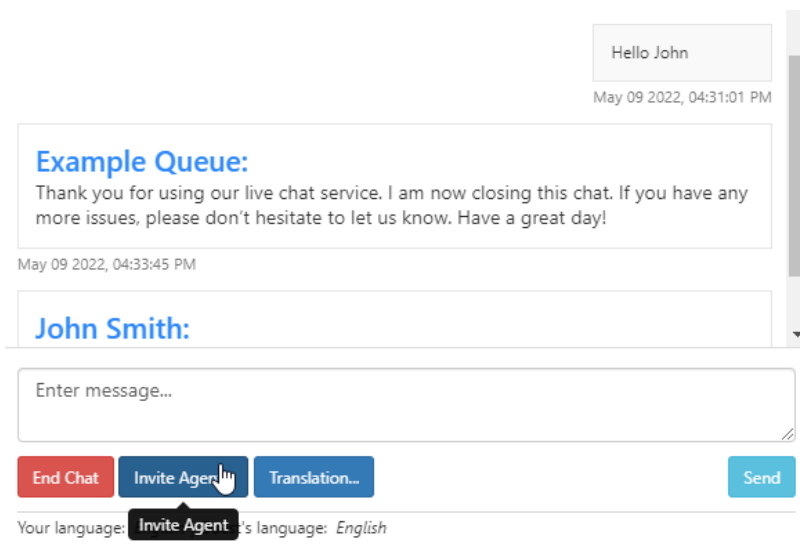


The screenshot displays the CHIME Agent Chat interface. On the left, a chat window shows a message from 'Morris' with a timestamp of 'May 10 2022, 12:33:49 PM' and a message from 'Ben Morris' with a timestamp of 'May 10 2022, 12:34:52 PM'. The chat window includes a 'Hide Context Window' button and a 'Send' button. On the right, the 'Files' tab is active, showing a list of uploaded files. The file list has the following structure:

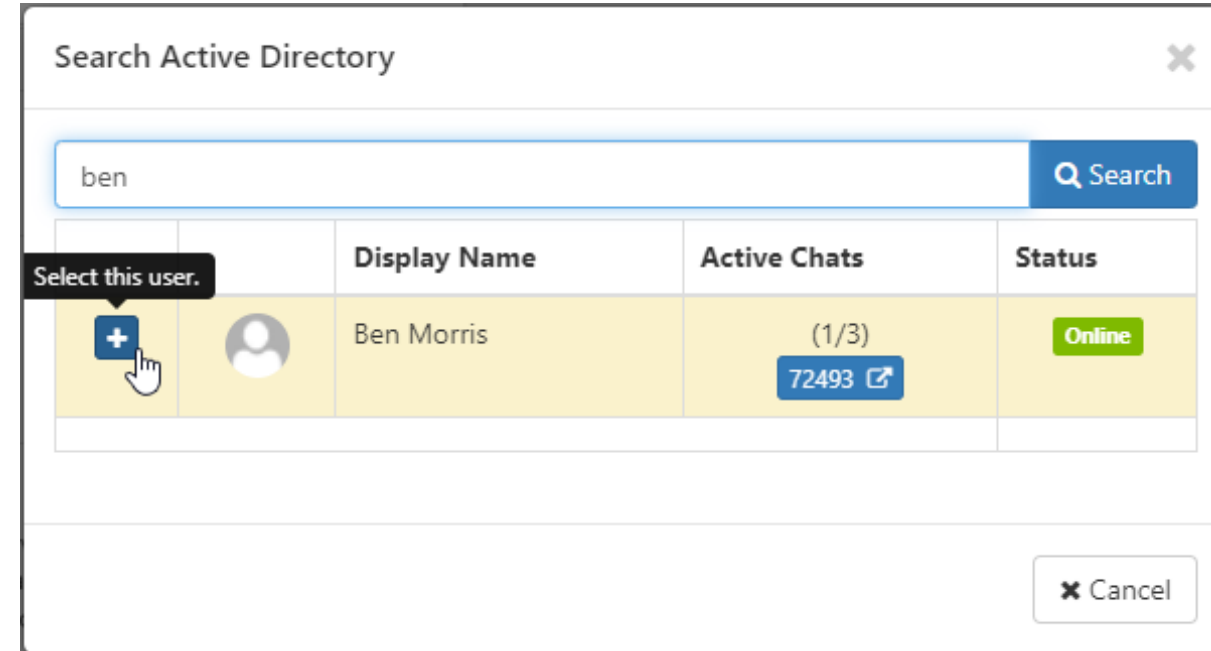
File Name	Download
72503-Example Screenshot.png	Download File

Below the file list, there are buttons for 'Browse...', 'Upload', and 'Refresh'. At the bottom of the chat window, there is a text input field labeled 'Enter message...' and buttons for 'End Chat', 'Invite Agent...', 'Translation...', and 'Send'. The bottom status bar shows 'Your language: English | Guest's language: English' and 'Connection: 6fd3c9ca-a490-464e-8997-25c3b63b5b28 | vm1 Build: 3.1.1002.0'.

- Additional Agents can be added using the Invite Agent button in the chat window
- When selected a directory search window will show so the agent can search for another agent in the queue and see their current status

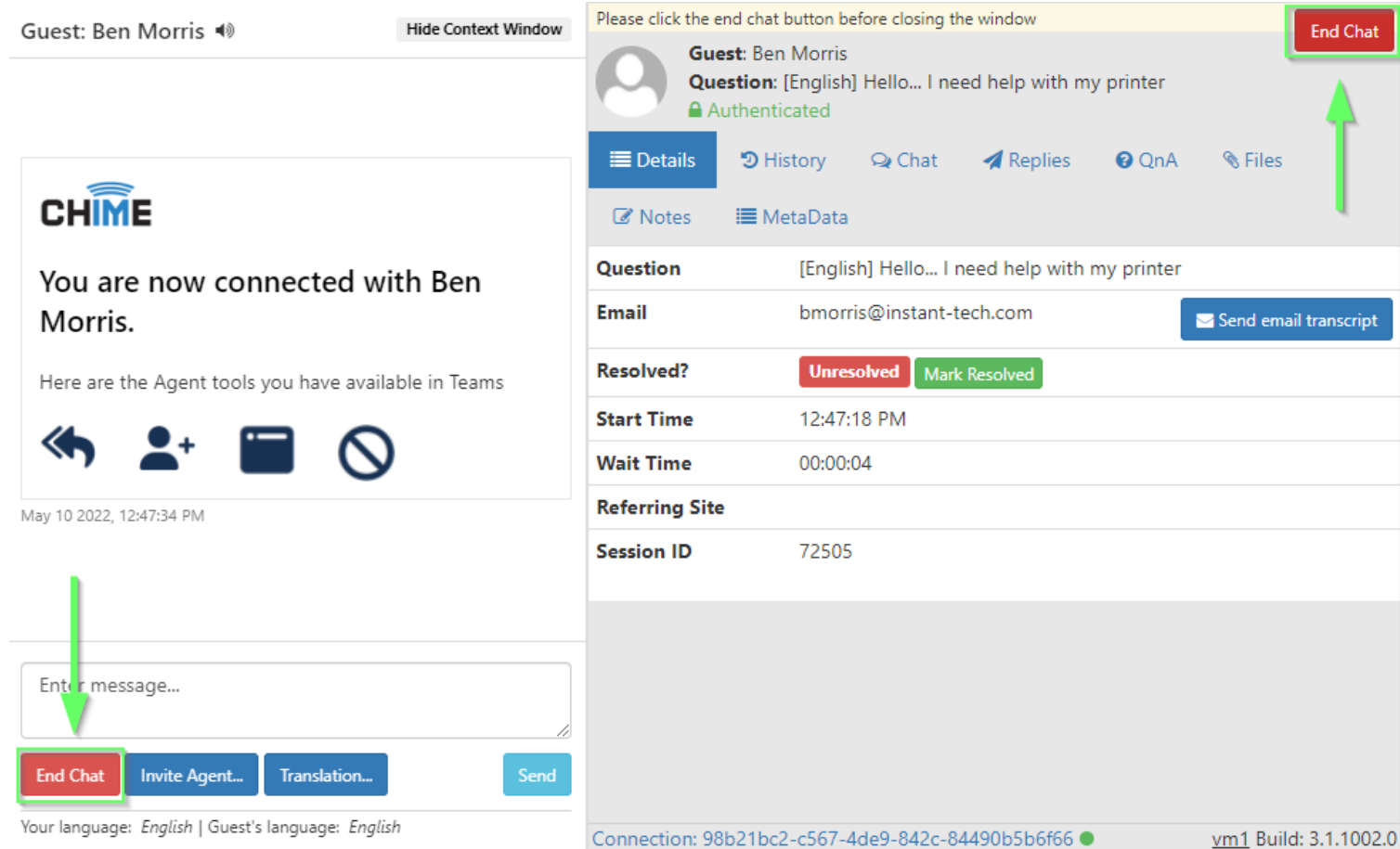


Invite Additional Agent



Agent is ready to end a chat

- The web UI has two end chat buttons.
- Agent can type the /end command to end the chat.



The screenshot displays the CHIME chat interface. On the left, the main chat area shows a message from Ben Morris and a set of agent tools. A green arrow points to the 'End Chat' button located below the message input field. On the right, a detailed chat window is open, showing the guest's question and various metadata. A green arrow points to the 'End Chat' button in the top right corner of this window. A yellow banner at the top of the detailed window reads 'Please click the end chat button before closing the window'.

Guest: Ben Morris Hide Context Window

CHIME

You are now connected with Ben Morris.

Here are the Agent tools you have available in Teams

May 10 2022, 12:47:34 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: Ben Morris
Question: [English] Hello... I need help with my printer
Authenticated

Details History Chat Replies QnA Files
Notes MetaData

Question [English] Hello... I need help with my printer

Email bmorris@instant-tech.com **Send email transcript**

Resolved? **Unresolved** Mark Resolved

Start Time 12:47:18 PM

Wait Time 00:00:04

Referring Site

Session ID 72505

Connection: 98b21bc2-c567-4de9-842c-84490b5b6f66 vm1 Build: 3.1.1002.0

- Don't try to update your presence on Chime – Update on Teams only
- If an agent is in a meeting and Teams shows status as in meeting/busy the agent will not receive any chat notifications
- If chat windows in Teams client are popped out, notifications are easier to manage
- Agent options are in two places, one is the bottom agent dashboard and the user dropdown menu
- Agent taking a break have two options
 - Disable themselves from the queue
 - Set Teams presence to away/busy



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>