InstantService™
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# Account Administration
# User Manual

*Account Administration User Manual*



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# Table of Contents

# How to Use this Manual

InstantService provides this manual as supplemental support once you have completed training as an InstantService administrator.

We recommend that you:

- Review the Table of Contents to become familiar with the topics covered in the manual.
- Familiarize yourself with techniques for navigating through the InstantService system.
- If you have any questions, feel free to direct them to our InstantService Support team:

  **Support Direct Phone:** 206.812.0524 (7:00 AM to 5:00 PM Monday – Friday PST/PDT)

  **Email:** support@instantservice.com (general questions/issues; include your phone number and extension in your email)

  **Chat:** www.instantservice.com (7:00 AM to 5:00 PM Monday – Friday PST/PDT)

  **After Hours Priority Support:** 877.857.2428 (5:00 PM – 7:00 AM Monday – Friday; Friday 5:00 PM to Monday 7:00 AM)

  Please provide the following information when leaving a message for call back:

  - Company Name
  - Account ID
  - Agent Name
  - Direct Call Back Number
  - Email Address
  - Issue Description

  **Support Portal:** www.clickaskanswered.com

# Chapter 1: Overview

Account Administration is the web-based system used to manage all aspects of your InstantService account. With this one interface, you can:

- Create departments and users (agents).
- Set preferences for department and user (agent) interactions with the system.
- Set user administration permissions.
- Define pro-active rules and invitations.
- View department, agent, customer, and status reports on chat and mail activity.

This powerful tool can support even large sites, yet it is easy to understand and use.

## System Requirements

### InstantService Agent Console

- Windows 2000 (SP3), XP (SP1, SP2, SP3), Vista (SP1) 32-bit [see **Note**] or Mac OSX 10.4 and 10.5

**Note:** For agents running Microsoft Windows Vista, to use the Agent Console with the Integration Panels and Agent Console Customer History Lookup reports, you must first disable the Microsoft Vista UAC. See Online Help > FAQ > How Do I Disable Microsoft Vista UAC?

- Java Runtime Environment Version 5.0 update 6+ or 6.0 update 1+
- 512 Megabytes of computer memory (1 Gigabyte recommended)
- Graphics card capable of 800x600 resolution at 16bits (1024x768 recommended)
- High speed dial-up Internet connection (broadband connection recommended)
- Compatible sound card (recommended)

### InstantService Account Administration Utility

- Internet Explorer 6, 7, and 8 (Windows), Firefox 3 (Windows or OSX), or Safari 3.2.1 (Windows and OSX)
- Java Runtime Environment Version 5.0 update 6+ or 6.0 update 1+
- High speed dial-up Internet connection (broadband connection recommended)

### InstantService Customer Chat Client

- Windows 2000, XP, Vista, Mac OSX
- Modern versions of most browsers including Internet Explorer, Firefox, Safari, and Opera
- High speed dial-up Internet connection

# Chapter 2: Navigation

This chapter provides a quick review of the types of navigation you can expect to encounter as you configure the system to meet your business requirements.

Movement throughout the InstantService system is based on tabbed pages and links, similar to the applications and websites with which you are already familiar:

- You enter Account Administration through the InstantService Customer Login page.
- Once logged in, you encounter the InstantService Customer Portal.
- From the Customer Portal, you can:
  - Review current InstantService announcements and the Support FAQ.
  - Launch Account Administration and the Agent Console.
  - Access policies, system requirements, downloads, user manuals, and an InstantService Sales and Support contact directory.
  - Communicate with an InstantService customer service representative via chat, phone call, or mail.

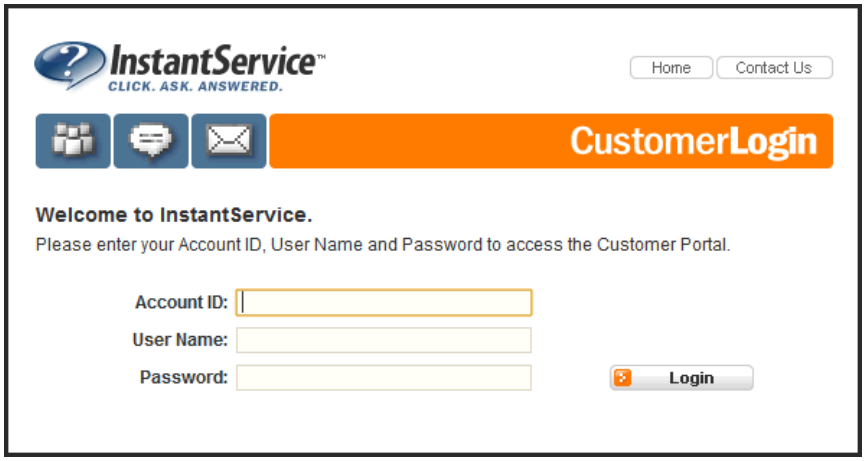
## Logging In

Prior to logging into the InstantService system, make sure you have your assigned account ID, user name, and password.

**Note:** If you do not have your login information, contact your local InstantService System Administrator, for example, your call center manager.

### To access the Customer Portal:

1. Using your internet browser, go to https://login.instantservice.com/



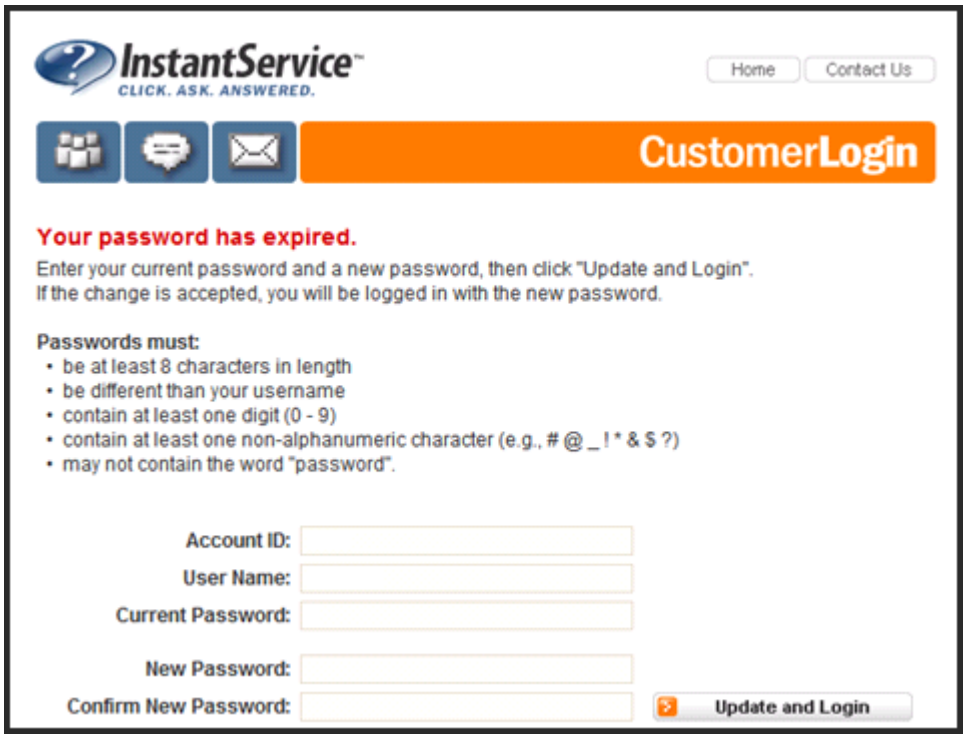

2. In the associated boxes, type your account ID number, user name, and password.

**Note:** Initially upon engaging with InstantService, you are sent an introductory email that includes your super user login, password, and support manuals.

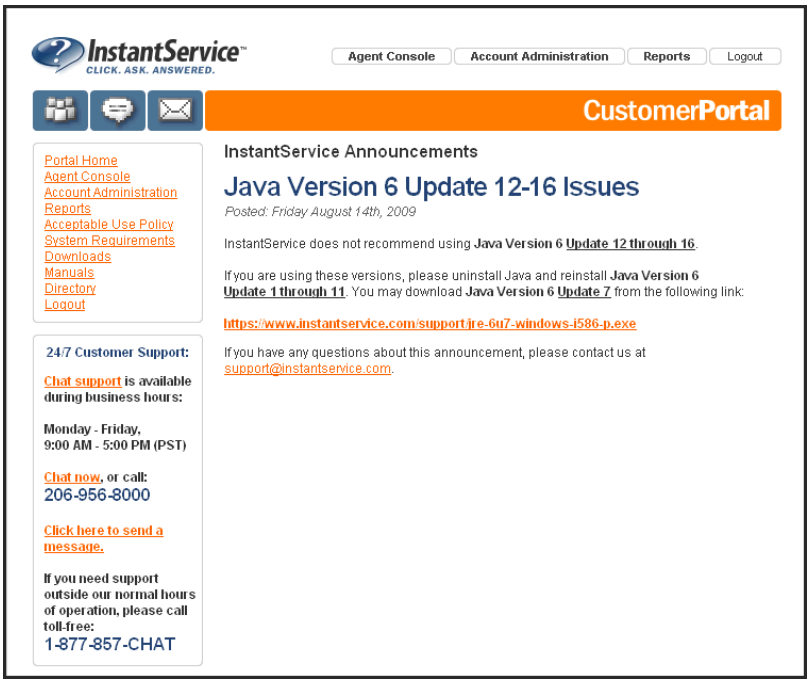
3. Click **Login**. If you have successfully logged in, the InstantService Customer Portal appears.

**Important:** If, during login, you use an incorrect password four (4) times, the system locks you out of Account Administration and the Agent Console for 30 minutes.

4. If the administrator forces you to enter a new password or your password expires, type the account ID, user name, current password, and a new password. If the new password is accepted, the Customer Portal appears.



# The Customer Portal



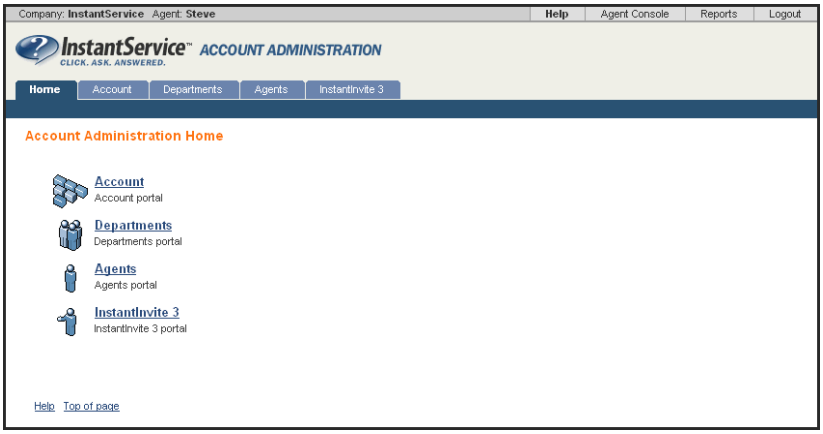

From the Customer Portal, you can access Account Administration.

> **Note:** Depending on your permissions for your account, the **Reports** button may or may not be available to access the Reports Portal directly from the Customer Portal.

# Accessing Account Administration

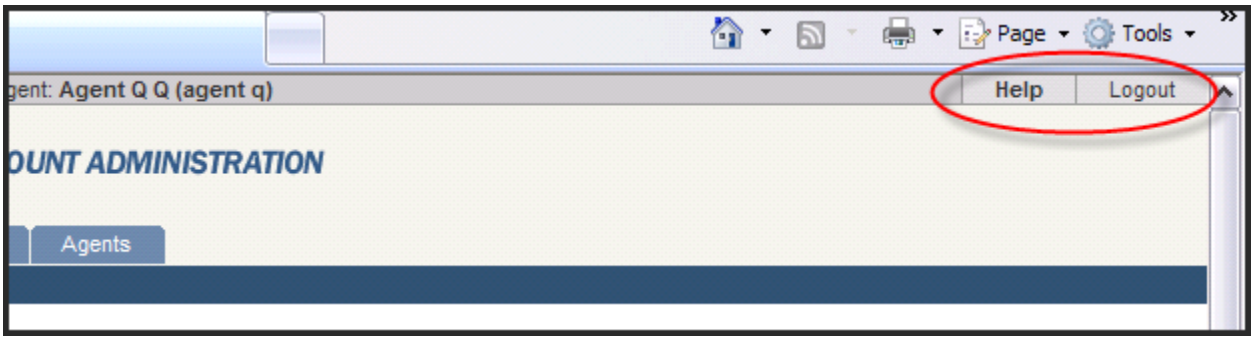
### To access Account Administration:

- At the top of the Customer Portal or from the menu on the left, click **Account Administration**. The Account Administration home page appears. This page contains links to all areas of Account Administration for which you have permissions.



- At the top of the page, click the buttons to do the following:
  - Access the **Help** file for the current page and all Help pages for Account Administration topics.
  - Access the **Agent Console**.
  - Access the **Reports Portal**. A new window opens to display the page.
  - **Logout** from Account Administration.

**Note:** Depending upon how your permissions are set, you only see those Account Administration page elements (for example, tabs or links) and navigation choices for which you have access. The following graphic shows how the Account Administration page would look if you did not have permission to run reports or access the Agent Console.



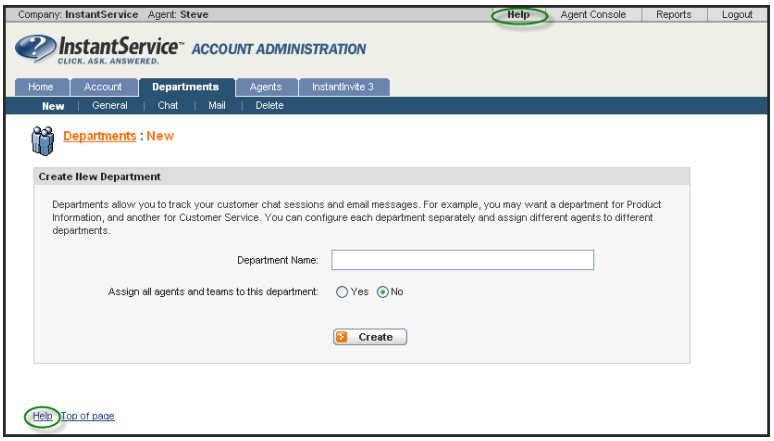

## Online Help System

Account Administration provides online Help in the following modes:

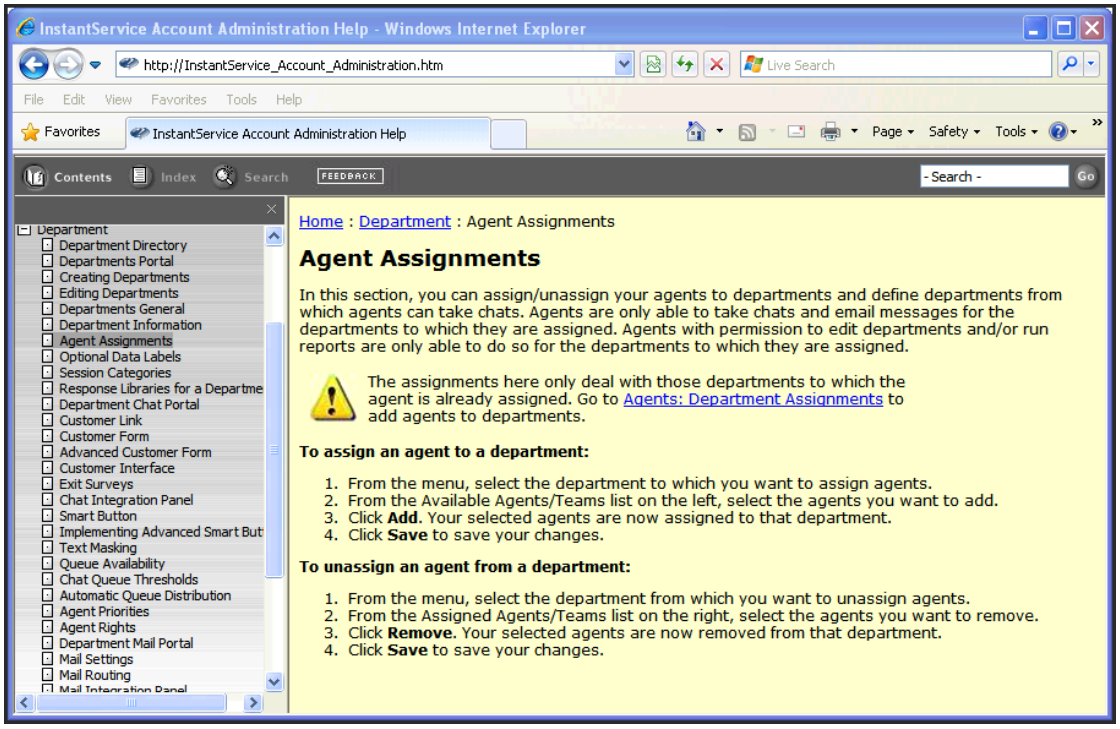
- Page-specific Help accessed from links on each Account Administration page.
- A complete Help topic system accessed once you open the page-specific Help.

### To access page-specific Help:

1. Once you have successfully logged into Account Administration, click the **Help** link at the top or bottom of any page.



Clicking the link opens the Help topic created specifically for that page. In the following example, the Help link was clicked from the **Departments: General: Agent Assignments** page.




**Note:** At this point, you have total access to the complete InstantService online Help system which includes Agent Console Help.

2. Using the online Help system, you can:
   - View any Help topic by using the tree structure in the left pane. Click the ⊞ icons to expand the tree diagram. Click the title to view it in the main Help pane.
   - View an index of all Help keywords by clicking the Index button at the top of the left pane. You can search for keywords or click a listed keyword to view an associated topic in the main Help pane.
   - View a glossary of terms used in Account Administration and the Agent Console by clicking the Glossary button at the top of the left pane.
   - Search for a word or phrase in all the titles by using one of the following methods:
     - Type the words in the Search field at the top of the Help window, and click the **Go** button.
     - Click the **Search** button at the top of the left pane, type the words in the field, and click the **Go** button.

   A list of titles appears in the left pane. Click the title to view it in the main Help pane. By default, the search words are **highlighted** for easy recognition.

**Note:** The words you type into the Search field are used in an **OR** search. For example, if you type **`agent chat`**, results bring up pages containing the word **`agent`** and the word **`chat`**. Using the index may be a better alternative for looking up word combinations.

### Help Icons

A number of help icons appear on the Online Help pages to provide quick access to special information about your topic:

Provides useful context for understanding the topic.

Identifies helpful hints or best practices to make your experience with InstantService more productive.

Alerts you to vital information and warnings.

## Navigation from the Account Administration Portal

From this point on, you can access any of the portals that align with activities you need to accomplish.

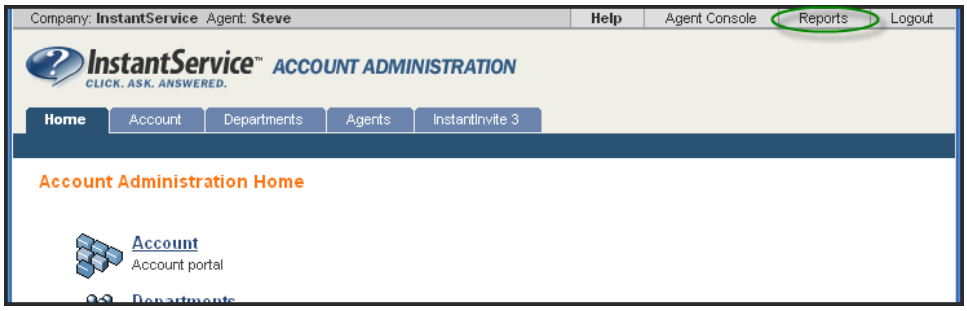
**Note:** Depending upon how your permissions are set, you only see those Account Administration page elements (for example, tabs or links) and navigation choices for which you have access.

The portals are:

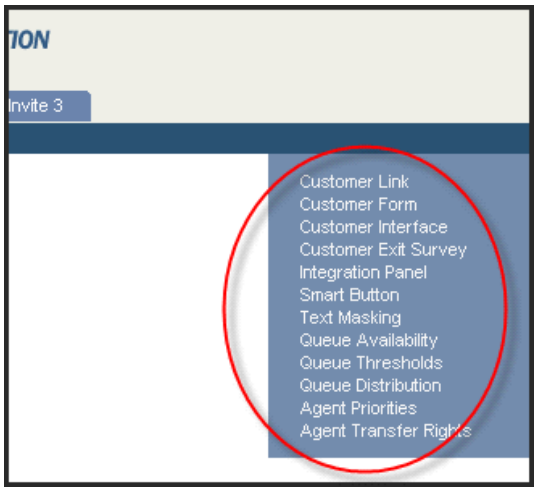
- Account
- Departments
- Agents
- InstantInvite
- Reports

Use one of the following methods to access the portals:

- Along the top of the page, click the tab associated with the portal you want to access.
- On the page, click the associated link to the portal you want to access.
- With proper permissions, to access the Reports portal, click the **Reports** button at the top of any page.




Once you access a portal, InstantService provides additional navigation using a menu located in a blue rectangle on the right side of the page. Click the associated menu item to access corresponding pages within the portal.



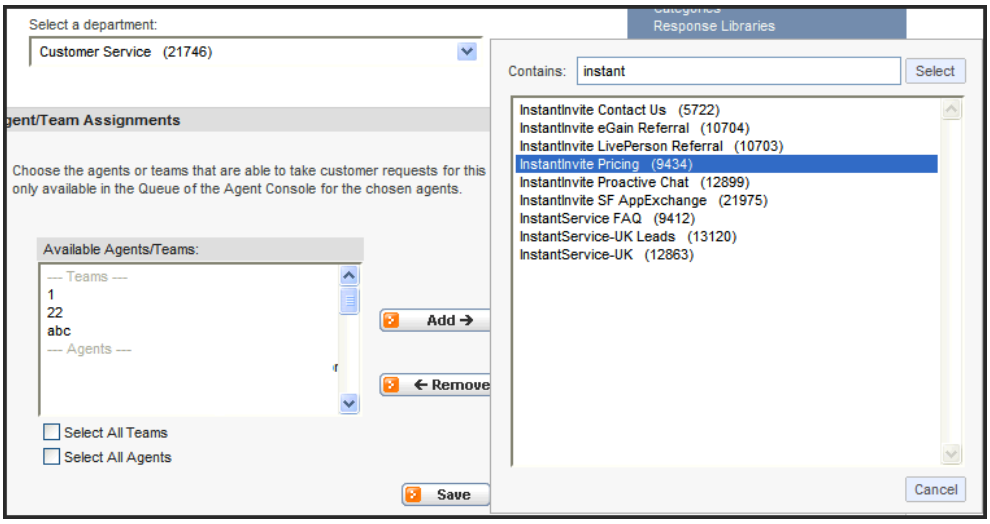

**Note:** If, after consulting this manual, you still have questions, contact the InstantService support team. See the *How to Use this Manual* section for details.

## Agent and Department Lists Search Capability

Selection of the department or agent name you want to edit in Account Administration uses contains search capability. The agent or department list is dynamically filtered to display only names containing the text you type. This search capability is available for any department or agent menu.

For example, on the **Departments: General: Agent Assignments** page, do the following:

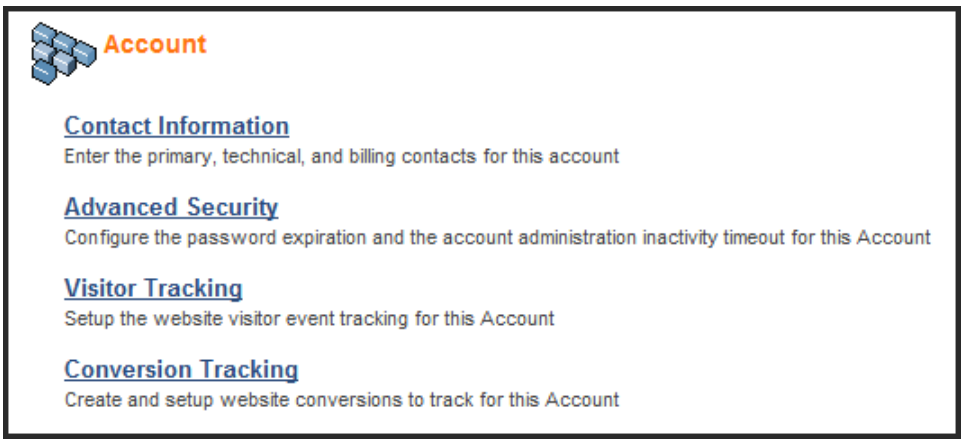
1. Click the **Search** button, and begin typing the first letters of a department in the list. The choices are narrowed until you can click the department you are looking for.
2. Click to highlight your choice, and click **Select**. Your department choice now appears in the Select a Department field.



# Chapter 3: Account

In the Account Portal, you can edit the following InstantService account information:

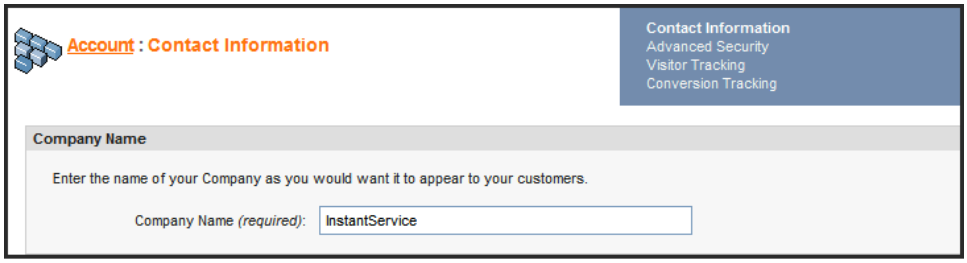
- Contact information
- Security settings
- Visitor and conversion tracking



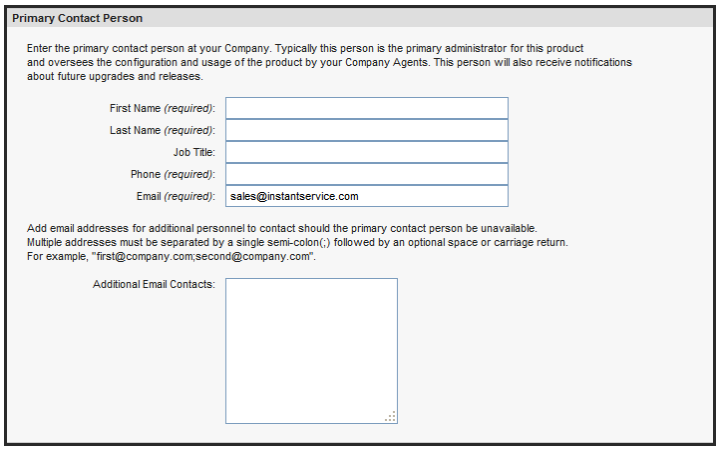
# Contact Information

Use the Contact Information page of the Account Portal to type:

- Your company name

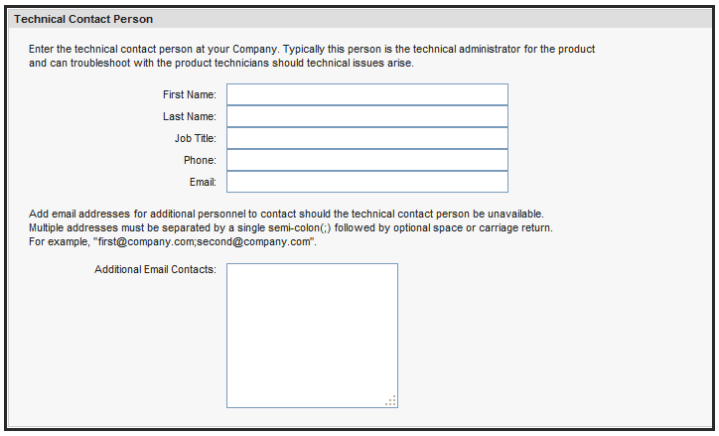



- Primary company contact

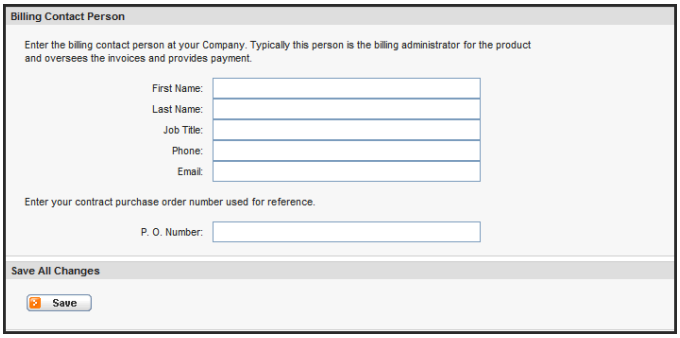



**Important:** Even though the person identified as your primary company contact is often your primary Account Administrator, typing a name here does not provide any administrative rights to the system. You must grant Administrative permissions using the Agents Portal. For more information, see *Chapter 5: Agents*.

- Technical contact



- Billing contact

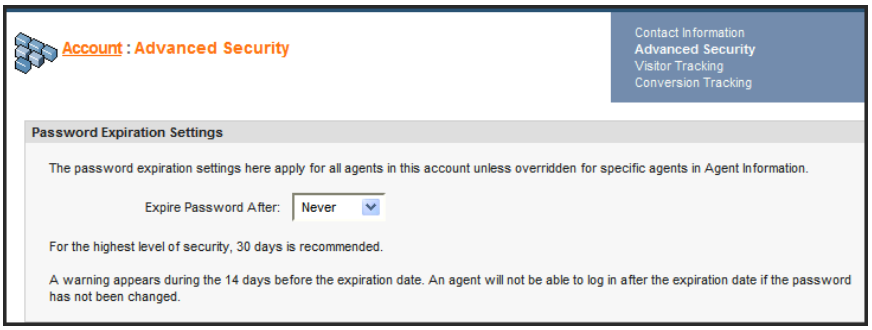



**Important**: Regularly update the Contact Information page. InstantService uses it to send out system notifications, alerts, announcements, and assist in password change administration.

## Advanced Security

The Advanced Security page of the Account Portal allows you to:

- Change password expiration settings.

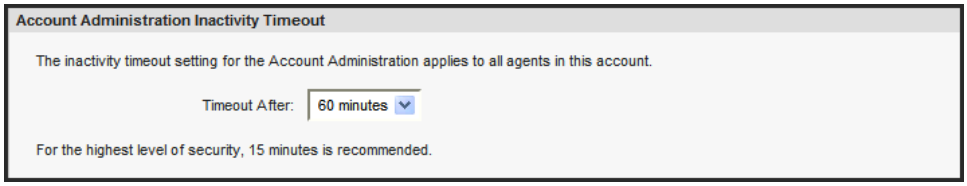



You may choose how long your agents keep their passwords before needing to generate a new one. Select your desired limit from the menu. Choices include:

- Never
- 30 days
- 45 days
- 60 days
- 90 days
- 120 days

Once you have completed your changes, click **Save**.

- Set the agent inactivity timeout limit.



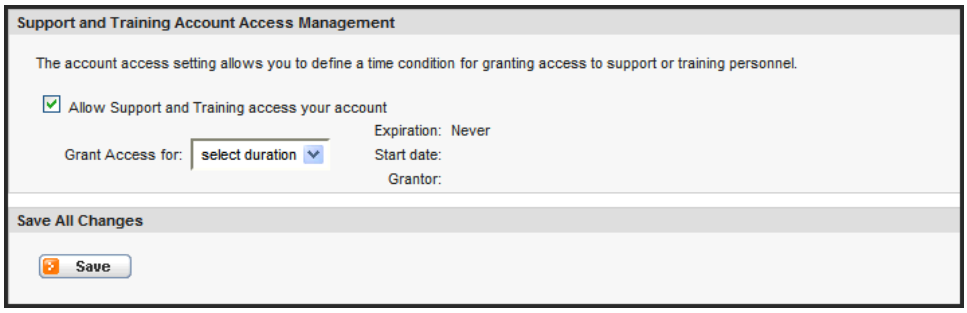

You can choose the time limit after which inactive agents are automatically logged out of Account Administration.

Select your desired timeout limit using the menu. Account Administration can be set to timeout after **15**, **30**, or **60 minutes**. This setting applies to all agents for the account.

Once you have completed your changes, click **Save**.

- Define the time conditions for granting account access to InstantService support or training personnel. The default setting **allows** InstantService access until you either change the setting to allow access for a given amount of time or you deny access.

**Note:** Once the access you set up expires, access is revoked for InstantService support or training personnel.




Access can be granted for the following durations:

- Never
- Always
- 1 day
- 3 days
- 7 days
- 14 days
- 30 days

**Note:** The system-generated agent used by InstantService Support and Training personnel to access your account is named **`INSTANTSERVICE SUPPORT (issupport)`**. The **`issupport`** agent is created the first time you grant any Support access other than the default access. It appears in all Agent lists in Account Administration—for example, on the Agents: Access: Permissions page. The agent cannot be deleted and remains in the Agent lists whether access is granted or denied.

**Important:** Prior to setting up Support and Training Access Management settings, ensure the correct information recorded on the Account: Contact Information page is up-to-date. Otherwise, system-generated email messages sent to all addresses listed in the Primary Contact Person section—including all additional email contacts—will not be received by the correct personnel.

The following actions produce the system-generated email messages:

- When you click **Save** in this section to either grant or deny access.
- If an access grant expires.

**To grant access for any time period:**

1. Select the **Allow Support and Training Access to Your Account** check box. When granting access, the Expiration, Start Date, and Grantor descriptions show the start and end dates of the access, and who granted the access.
2. Click **Save**.

**To deny access:**

1. Clear the **Allow Support and Training Access to Your Account** check box. In this case, the Expiration description reads **Never**, and the Start Date and Grantor descriptions are blank.
2. Click **Save**.

## Visitor and Conversion Tracking

For information on visitor and conversion tracking, contact your InstantService Account Administrator or the InstantService *Visitor and Conversion Tracking User Guide*.

# Chapter 4: Departments

The Departments Portal allows you to configure global department assignments for agents, create new departments, and edit existing ones. Creating departments for your account can:

- Provide routing for incoming chats and mail messages.

  Each department can have a unique link on your site to allow your agents to identify a customer entry point.

- Facilitate multiple tiers of support.

  You have the option to create departments with no direct links on your site, only receiving chats and mail messages via transfer from other agents.


**Important**: After completing activities on these pages, remember to click **Save**. If not, your additions and changes are lost.

# Account (Default) Department

The Account (Default) department is created by InstantService when your account is activated, and cannot be renamed or deleted. It can be used to set up global agent assignments for all departments created afterwards.

If you choose not to use the Account (Default) department, you can bypass it by not assigning any mail or chat traffic to it.

**Note:** Administrators can still modify the Account (Default) department even when they do not have Modify Department permissions as long as they have Modify Account permissions enabled. For more information, see Permissions.

## Using the Account (Default) Department

- Prior to creating new departments, we recommend you develop a set of global assignments, and response libraries and articles that apply and are accessible to all agents.

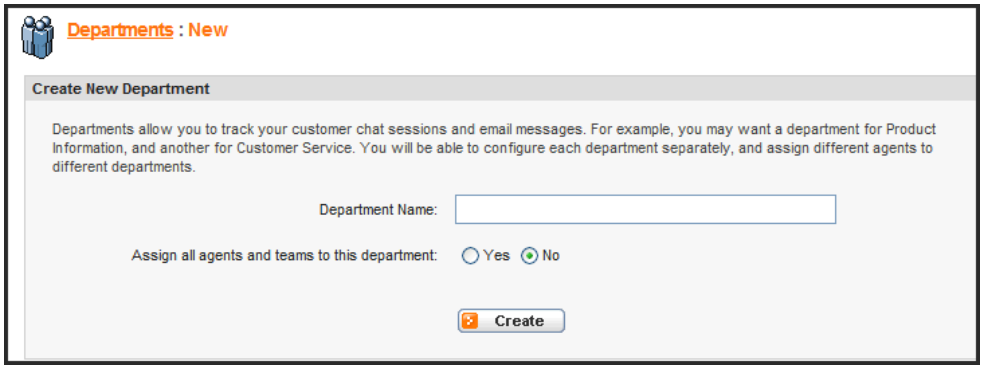
**Note:** Once set, these global assignments are a part of all newly created departments. However, once you have created new departments, if you make additional changes to the Account (Default) department, the changes do not retroactively apply to the departments already created. Only those departments created after the change reflect the updated global assignments.

- For a list of pages you can use to configure the Account (Default) department, see Appendix 5: Account (Default) Department Configuration Pages.
- Make changes to all pages to reflect the global assignments using the Account (Default) department as your template.
- Once you have completed the setup, create new departments. The global assignments are now a part of the new departments.

## New

This page allows you to create new departments within your company account.

### To create a new department:

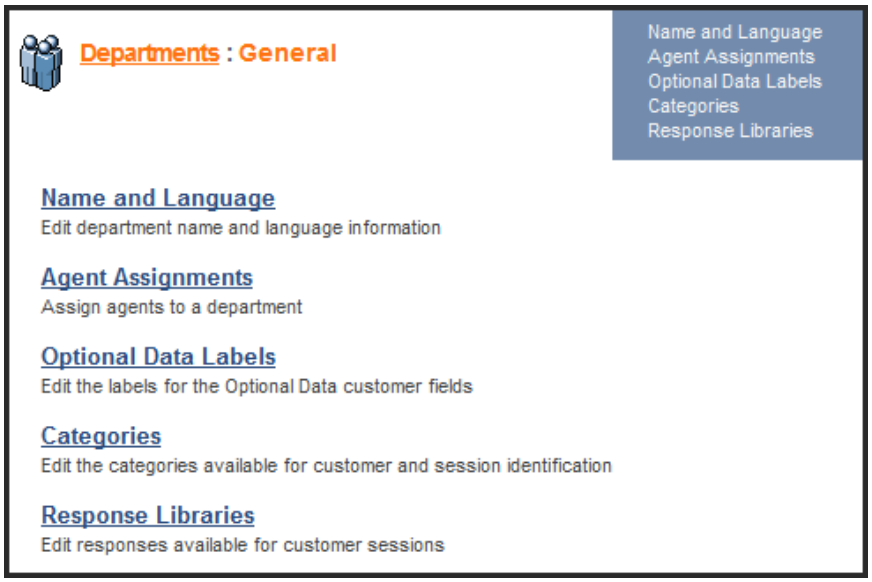



1. On the Departments menu or page link, click **New**. The Create New Department page appears.
2. In the box, type your desired department name.

   **Note:** The character length for your department name is limited to 100 characters. Avoid using apostrophes (‘) as this results in an error message.

3. Click the **Yes** option to assign all agents and teams to the new department.
4. By clicking the **No** option, no other agents are assigned to the new department at this point. You as the department creator are the only agent assigned to the department at this time. Additional agents can be assigned to this department in the future using the Departments: General: Agent Assignments page.

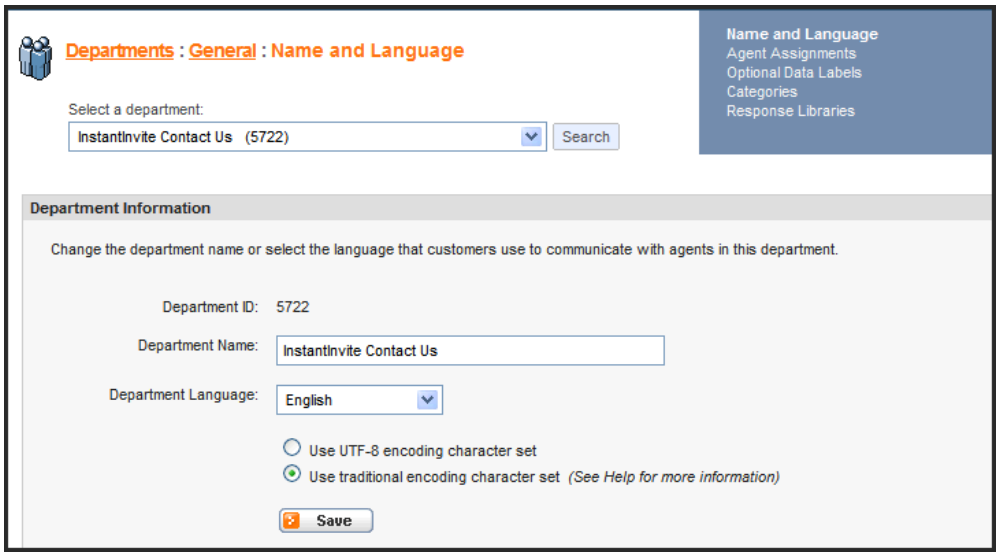
# General




The General page allows you to:

- Edit your department name and select the language your customers use to communicate with agents in that department.
- Assign agents to departments and define departments from which agents can take chats and mail messages.
- Define custom labels applied to the 26 optional data field values available for custom integration.
- Create and edit the categories into which your agents place chats and mail messages for the selected department.
- Create and edit pre-defined responses available to your agents for use when responding to customers.

## Name and Language




The **Department ID** lists the unique identifier for this department. This is used to identify the department for both the chat and mail queues. The ID number is view-only. The **Department Name** is the name your agents and customers see for this department in the application. You can rename the department by typing in a new name.

**Department Language** affects how chat text characters (see **Note**) are encoded and decoded within the Customer Form and Customer Interface. This is achieved by identifying a character encoding set. For each language, the character encoding set may be the traditional one specific for that language, or it may be universal, which many different languages use.

For example, if you set the department language to Japanese, text characters sent by the customer browser to this department may be decoded using Shift-JIS (the character set traditionally associated with the Japanese language) or the more universal UTF-8.

> **Note:** Text characters in mail messages are encoded and decoded using the encoding character set already identified within the customer's mail message. Only agent-originated mail messages use the encoding character set identified by the department language setting.

The following is a list of available languages shown with their traditional character sets:

| Language | Traditional Character Set |
|---|---|
| Chinese (Simplified) | gb2312 |
| Chinese (Traditional) | big5 |
| Dutch | iso-8859-1 (also known as Latin1) |
| English | iso-8859-1 |
| French | iso-8859-1 |
| German | iso-8859-1 |
| Greek | iso-8859-7 |

| Language | Traditional Character Set |
|---|---|
| Italian | iso-8859-1 |
| Japanese | shift-jis |
| Korean | ksc5601 |
| Polish | iso-8859-2 (also known as Latin2) |
| Portuguese | iso-8859-1 |
| Spanish | iso-8859-1 |
| Swedish | iso-8859-1 |

If the communication sent between you and your customer strictly uses the one language, then select the Use Traditional Encoding Character Set option. This is the default setting.

**Important:** The Traditional encoding character set is specific to the language and limits your browser's ability to understand text from other languages. For example, if you are using the traditional character set for Traditional Chinese (big5), and someone sends a chat text in French (which requires iso-8859-1), then unintelligible characters appear in the chat session.

The UTF-8 (8-bit UCS/Unicode Transformation Format) encoding character set recognizes a broader range of characters. By choosing this option, the selected department interprets received text characters using UTF-8 instead of the character set that is traditionally associated with the language.

**Important:** Use the UTF-8 option if there is a chance chat communication in the department may occur in more than one language.

Changes to the Department Language option on the Name and Language page dynamically changes the code snippet tag displayed on the **Departments: Chat: Customer Form: Advanced Customer Form** page under **Language Support**. If you choose to create your own Advanced Customer Form to host on your servers, you must include this associated tag at the top of the HTML page in order for text characters in form values to be encoded and decoded correctly by InstantService servers. For example, if you have chosen **`Spanish`** as the department language with **Traditional encoding**, then the corresponding tag would look like this:

```
<META HTTP-EQUIV="Content-Type" CONTENT="text/html; charset=ISO-8859-
1">
```

While the tag for UTF-8 encoding would look like this:

```
<META HTTP-EQUIV="Content-Type" CONTENT="text/html; charset=UTF-8">
```

**Important:** Language changes only affect Customer Client Chat. It is not a translation application. Agents must still type using the required language and understand the customer responses for themselves. Agent Console labeling is also not translated.

### To use this page, do the following:

1. Use the **Select a Department** menu to choose the department you want to edit.

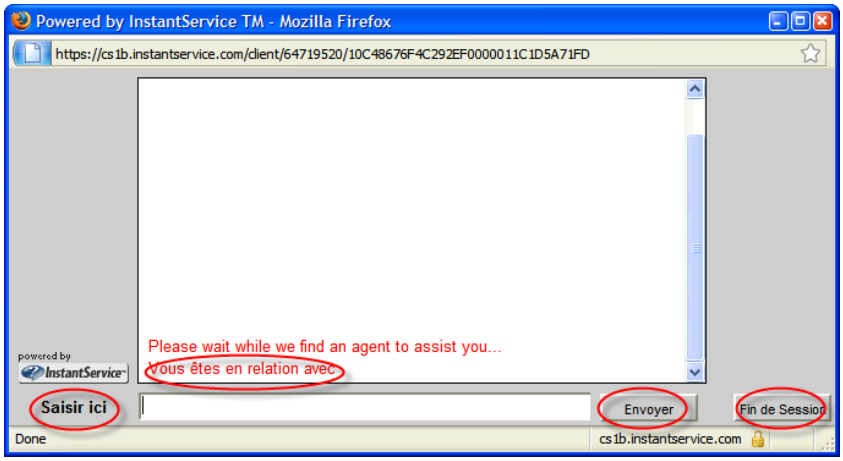
   **Note:** The **Department ID** is a unique identifier assigned to each department in your account. The ID is used throughout the system, for example, in the department chat link and mail address.

2. Edit the Department Name box.
3. Choose from the following languages in the Department Language menu:

   - Chinese (Simplified)
   - Chinese (Traditional)
   - Dutch
   - English
   - French
   - German
   - Greek
   - Italian
   - Japanese
   - Korean
   - Polish
   - Portuguese
   - Spanish
   - Swedish

   **Note:** The selection you make for the Department Language localizes text presented on the Advanced Customer Form, Exit Survey, and Customer Client. **This setting does not translate text typed into fields or the Response Library information.** It merely localizes the text on, for example, field names, buttons, and other labels.

   The following graphic shows the client chat window localized for French.




4. If communication between you and your customer strictly uses the UTF-8 (Unicode) character set, click the **Use UTF-8 Encoding Character Set** option.

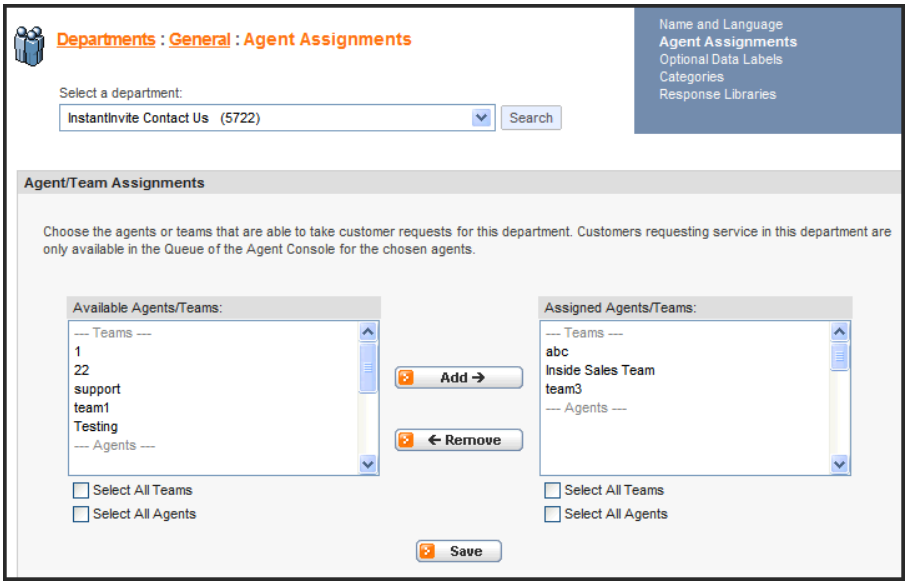
   **Note:** InstantService supports both traditional and Unicode character sets.

5. Once you have completed your edits, click **Save**.

## Agent Assignments

Agent assignments are department-specific. Agents can only take chats and mail messages, edit departments, or run reports for the departments to which they are assigned.

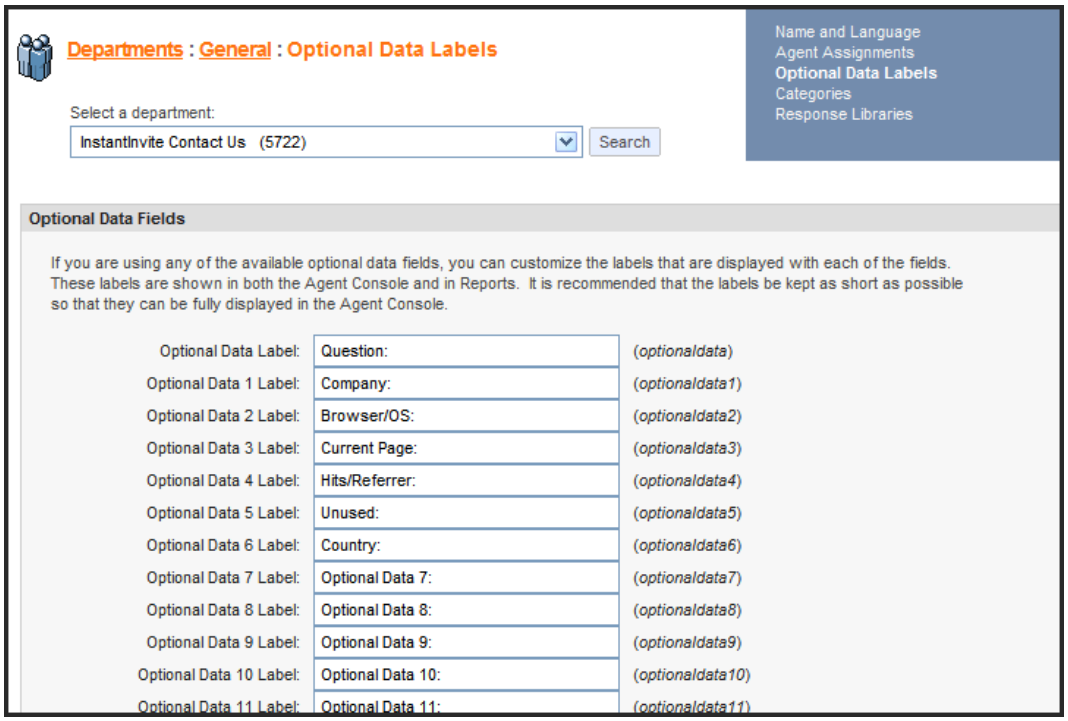
### To assign or remove an agent:




1. Select the department for which you want to assign or remove agents.
2. To assign an agent to the department, click the agent or team name in the Available Agents/Teams panel, and click **Add**. The agent or team is now assigned to the department.
3. To remove an agent, click the agent or team name in the Assigned Agents/Teams panel, and click **Remove**. The agent or team is now removed from the department.
4. Click **Save**.

**Note:** To do bulk additions or removals, click the **Select All Teams** or **Select All Agents** check boxes located under each panel. Use the key combinations **Shift+Click** or **Ctrl+Click** to select multiple agents and teams.

## Optional Data Labels




You can define data labels for all of the optional data field values. The labels appear in both the Agent Console and within any reports that use these fields. The values apply to:

- Chat Customers

  The values can be sent with customer information if you are using an advanced customer form. The labels are not sent with the values; they are pre-defined on the Optional Data Labels page and applied to the corresponding values sent with the customer information.

- Mail Messages

  If mail is available for your account, the field labels are applied to custom mail headers that can be defined within a mail message.

- Defaults

  The default values for the optional data labels are used when no custom label has been defined. For each label, the default value is **Optional Data X**, where **X** is the number of the optional data field. However, this is not the case with the first field, which is simply **Optional Data**.

### To use this page, do the following:

1. Select a department from the menu.
2. Click the data label you want to edit, and type the label name.
3. Click **Save**.

### Using special attributes with the data labels:

- Add the identifier (**read-only)** to the optional data label for that box.

  Agents are unable to change the value of this field in the Agent Console if the identifier is present in the label.

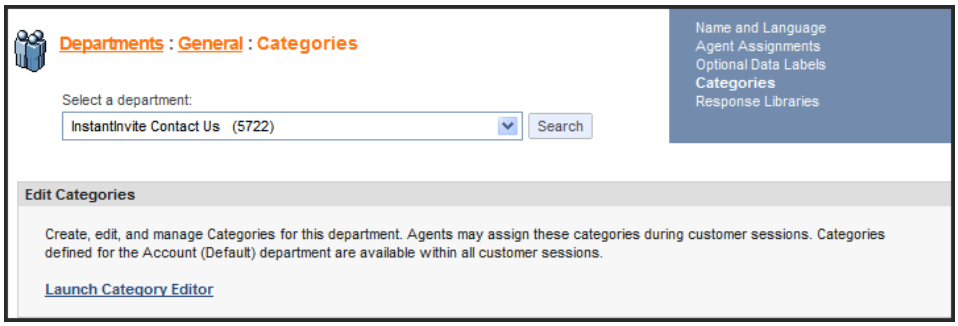
- Add the identifier (**display-only)** to the optional data label for that field.

  Any data stored in an optional data field with this identifier is only accessible during the agent's session with the customer. The value in the field is not stored in the database and is not retrievable via any mechanism including reports.

- Add the identifier (**hidden)** to the optional data field label for that field.

  The optional data field is not displayed in the Agent Console.

## Categories




Use the Session Categories Editor to create and edit the categories into which agents place chats and mail messages for a specific department. Create up to three levels of folders; each folder may contain as many categories as you need to satisfy your business requirements.

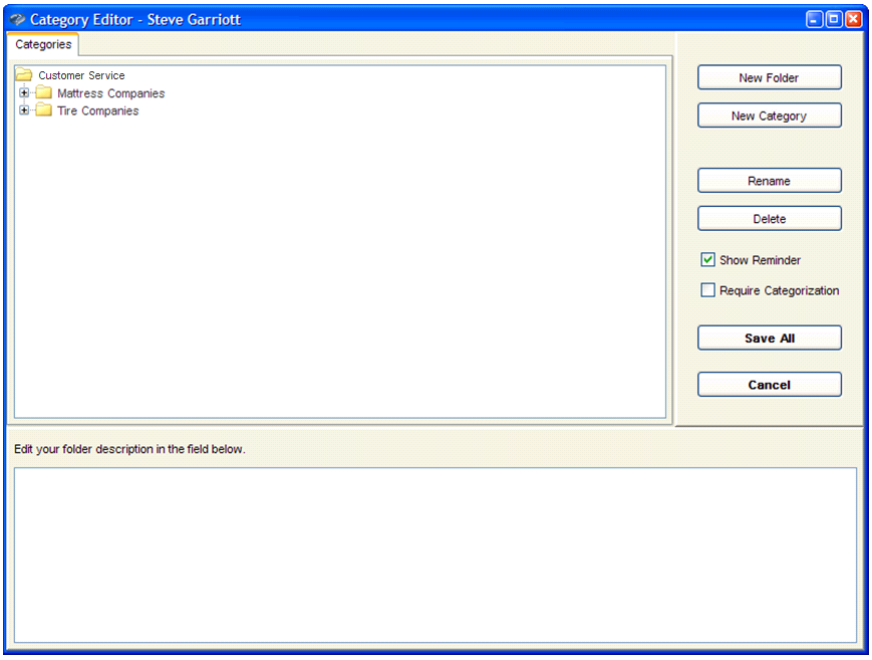
The Editor requires the same Sun Java Runtime Engine (JRE) that runs the Agent Console.

> **Note:** If the JRE is not installed on your machine, you receive a prompt to download.

### To create a new category or edit an existing category:

1. Select a department from the menu, and click **Launch Category Editor**. The Category Editor window appears.

> **Note:** When using the Firefox browser, you may encounter the following: an Opening Category Editor window may appear. If so, click the **Open With** option, select **Java Web Start Launcher** from the menu, and click **OK**. The Category Editor window appears.




2. You can do the following:

   - Click **New Folder** to create a container for new categories. You can type a description of the folder in the panel at the bottom of the editor.

**Note:** A folder is not a category. To avoid any confusion, avoid having folders without categories

   - Click **New Category** to create a new category within a folder. Click a folder under the department folder to make this button active. Use the panel at the bottom of the editor to type a category description.

**Note:** The system displays the description as a tool tip in the Agent Console.

   - Click **Rename** to edit any of the names in the Categories panel: folder or category. Click a folder or category under the department folder to make this button active. Type the changes as you typed in the original name.

**Note:** You can also triple-click an item within the panel to rename it.

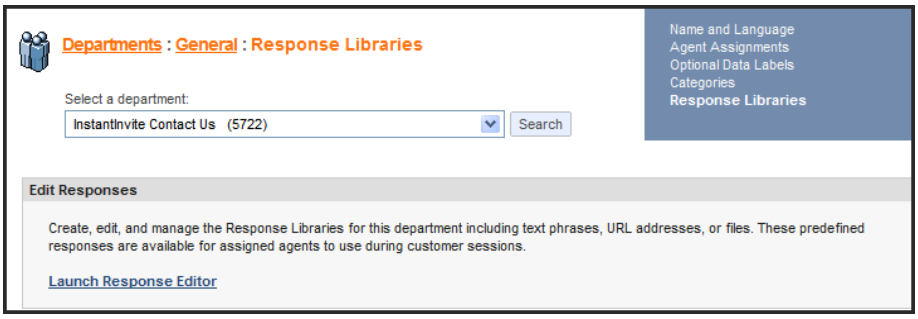
   - Click **Delete** to remove a selected folder or category from the Editor panel. Click a folder or category under the department folder to make this button active.

**Important:** Deleting a folder deletes all sub-folders and categories.

3. Click **Save All**, or click **Cancel** to avoid saving changes.

**Note:** If you have created categories for a department, agents can view a Categories Integration Panel tab in the Agent Console on the Customer Chat or Mail Details window.

## Response Libraries




The Response Library page allows you to create and edit pre-defined responses available for agent use when responding to customers. The editor allows you to create and edit pre-defined text, URL, or file responses and organize the responses into folders for each department or agent.

In addition, HTML tags are available for use in the response libraries. For more information, see *Appendix 3: HTML Tags*.

> **Important:** As a best practice, **`<img>`** (image) tag links used in response libraries should use **`HTTPS`** (secure HTTP) instead of **`HTTP`**. This is to prevent warning dialogs from appearing to the customer during a chat session.

You may create up to ten (10) levels of folders. Each folder may contain as many responses as you require. The editor displays the folders and responses exactly as they appear in the Agent Console.

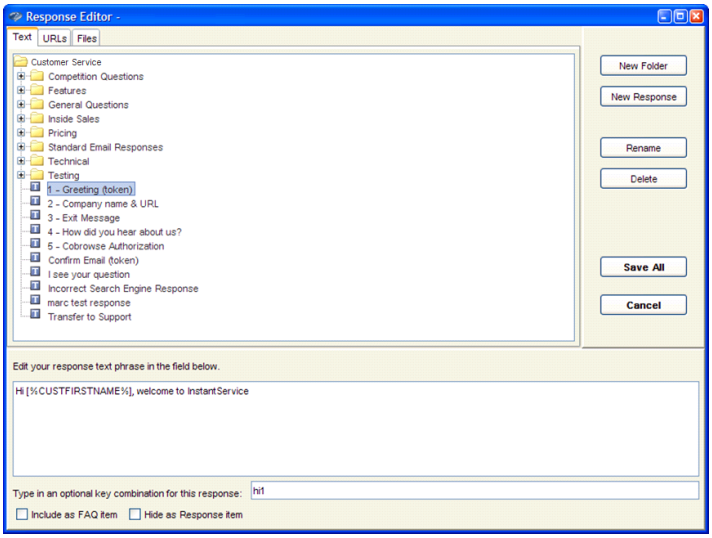
The Editor requires the same Sun Java Runtime Engine (JRE) that runs the Agent Console.

> **Note:** If the JRE is not installed on your machine, you receive a prompt to download.

### To create a new response library or edit an existing library:

1. Select a department from the menu, and click **Launch Response Editor**.

> **Note:** When using the Firefox browser, you may encounter the following: an Opening Category Editor window may appear. If so, click the **Open With** option, select **Java Web Start Launcher** from the menu, and click **OK**. The Category Editor window appears.




2. You can do the following:

   - Click **New Folder** to create a container for associated responses. Use the panel at the bottom of the editor to type a folder description.

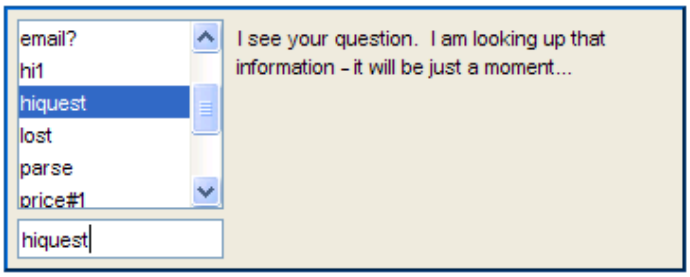
**Note:** As a best practice, use folders to organize your responses. This aids your agents in finding appropriate responses quickly. Folders, however, are not a prerequisite for creating responses.

   - Click **New Response** to add an agent response to a folder. Type the name and type the response in the box at the bottom of the editor.

**Note:** At this time, you can also add key word associations to allow your agents to quickly insert responses into a chat or mail message.

   - To assign a hot key combination to a response:
     - Ensure you have selected the response for which you want a key word association. At the bottom of the editor window, an optional response box is now active.
     - Type the key word in the box.

**Note:** To access the list of responses in the Agent Console, press **`CTRL + /`**. The following graphic shows the response window that appears. Click the response shortcut abbreviation to view the associated response. For more information, see the *Agent Console User Manual*.




- Click **Rename** to edit the name of a folder or response. The department name is not editable from this window.
- Click **Delete** to remove a folder or response from the library.

3. Click the corresponding check box to include a response in your FAQ section and hide it as a response item for this department.
4. Click **Save All**, or click **Cancel** to avoid saving changes.

## Chat

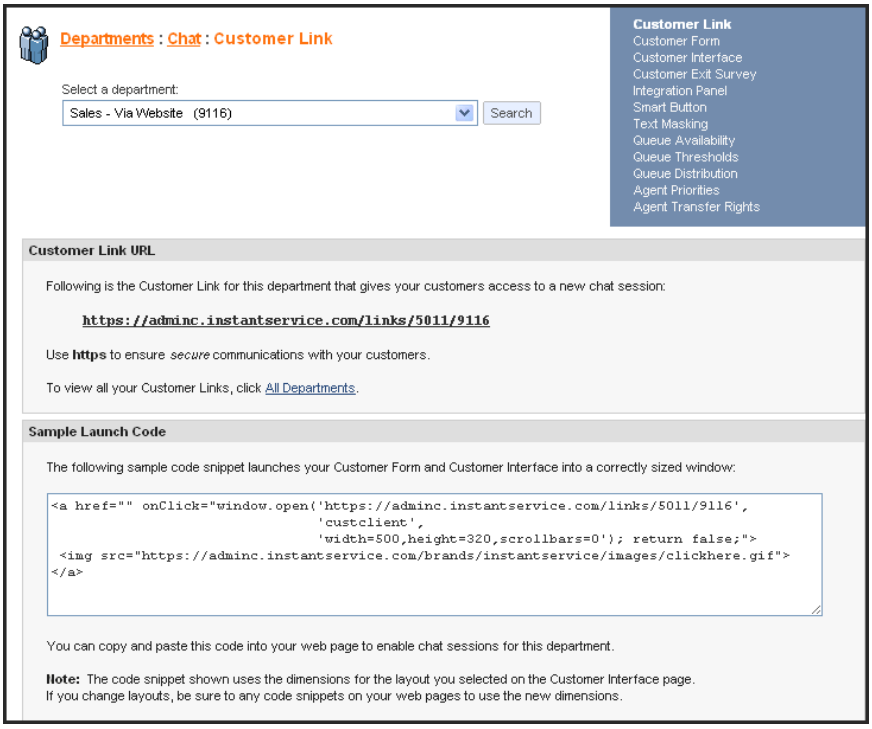
Use the Chat section to create and edit the chat properties for your departments. Only agents with the proper permissions can view this page.


Chat property areas are:

- Customer Link
- Customer Form
- Customer Interface
- Customer Exit Survey

- Integration Panel
- Smart Button
- Text Masking
- Queue Availability
- Queue Thresholds
- Queue Distribution
- Agent Priorities
- Agent Transfer Rights

## Customer Link

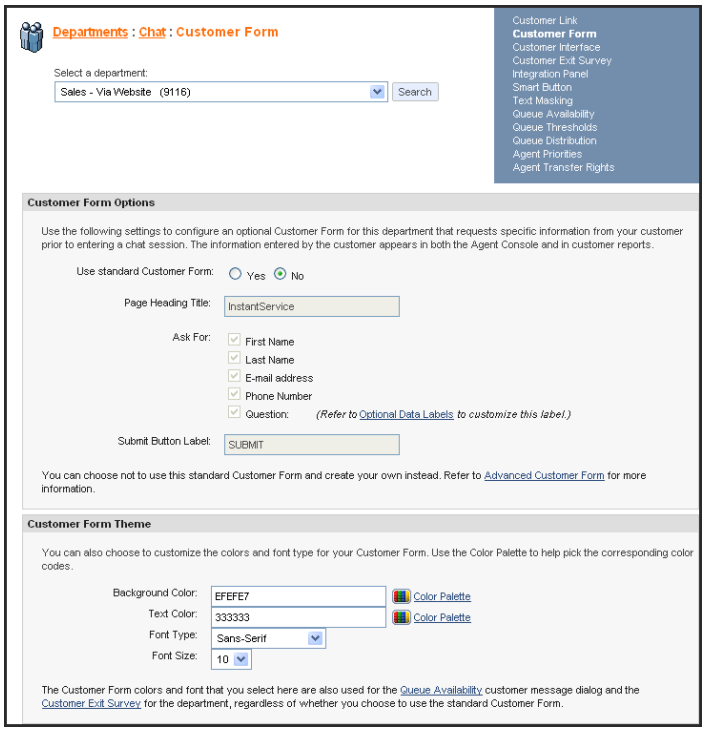



This page provides the URL and associated sample HTML code you use on your website to allow a customer to initiate a chat session. The customer link is different for each department.

### To place the link on your site:

1. Select a department from the menu.
2. Copy the customer link sample code.
3. Create a link on your website using the sample code.

## Customer Form




The customer form allows you to collect information before customers enter a chat session. This form appears when customers click the customer link you have copied to your site.

You can choose either the standard customer form or an advanced customized form. To access the Advanced Customer Form, click the link under Customer Form Options.

> **Note:** If you choose to create your own form, see Advanced Customer Form in this chapter.

With the Standard Customer Form, you can indicate what data to collect from the customers and customize the functionality of the form. If you do not want to collect any information, customers bypass this form and go directly to a chat session.

If you select one or more check boxes indicating information to collect from your customers, your customers encounter the form when they click the customer link. You can create separate customer forms for each department.

> **Note:** If you click the **Yes** option for Use Customer Form and clear all the check boxes, the **No** option is automatically selected.

### To customize the Customer Form:

1. Select a department from the menu.
2. Click **Yes** to make the form boxes available.
3. Type a title for the form.

4. Click the check boxes for the information you want to collect:
    - First Name
    - Last Name
    - Email Address
    - Phone Number
    - A unique question created using optional data labels
5. Type the label for the Submit button.
6. Under Customer Form Theme, make changes to background and text color, and font type and size.

**Note:** Changes to the Customer Form Theme also affect the look and feel of the Exit Survey and Queue Unavailable Message.

7. Click **Preview** to review the changes.
8. Click **Save**.

## Advanced Customer Form


InstantService provides you with basic control over the look of your customer form hosted on our servers. However, there are a few circumstances where you may want to create and host your own version of the form directly on your own site rather than linking to the customer form provided by InstantService.

The Advanced Customer Form allows you to:

- Better control the form display and layout.
- Use customer data already collected on your site. You can have hidden HTML form boxes filled in with that data rather than requiring your customers to enter the data again manually.

The Advanced Customer Form page provides you with the HTML form field names required to submit the form to the InstantService site.

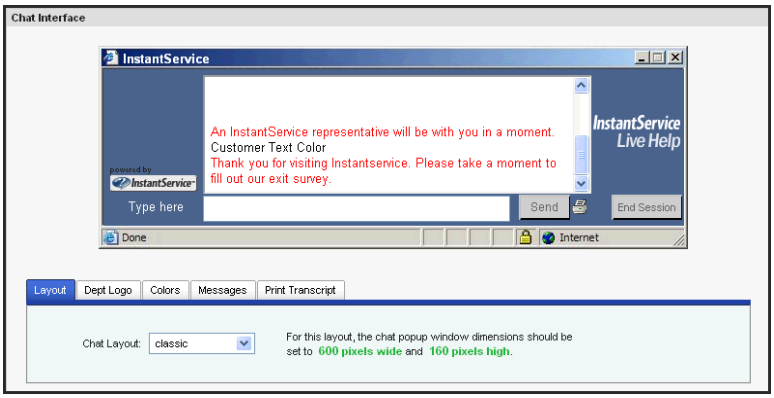
> **Note:** Other than the required **ai** (Account ID) and **di** (Department ID) fields, remaining parameters are optional, and you can use them in any fashion to achieve your business requirements.

## Customer Client Interface

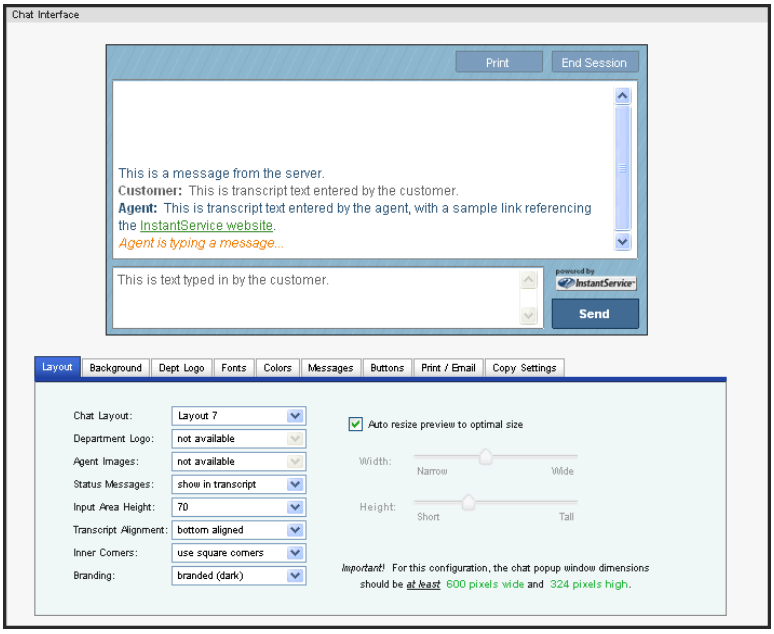
Use this page to create customized functionality for the customer client interface seen by your customers. Changes made to the interface settings are reflected in the preview in the Chat Interface section. For example, on the Layout tab, select a different layout type or number. The interface changes to reflect the new interface settings.

There are two customer client interfaces you may encounter in administering your department chat presence. They are:

- **Legacy**




- **New**

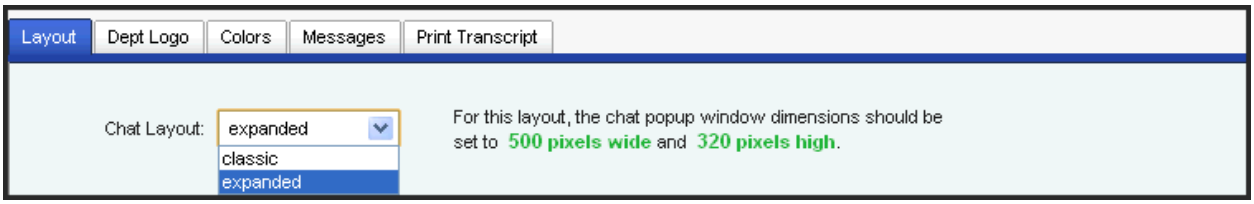


**Note:** HTML tags are supported in the customer client. For more information, see *Appendix 3: HTML Tags*.

## Using the Legacy Customer Client Customization

Customization areas for the legacy customer client have been arranged on the following tabs:

- **Layout:** Select the **Classic** or **Expanded** version of the customer client. The expanded version provides larger transcript and agent response panes.




- **Department Logos:** Upload a department logo for your layout. Click **Choose File** to move to the location of your department logo file. Upload or remove images using the buttons.

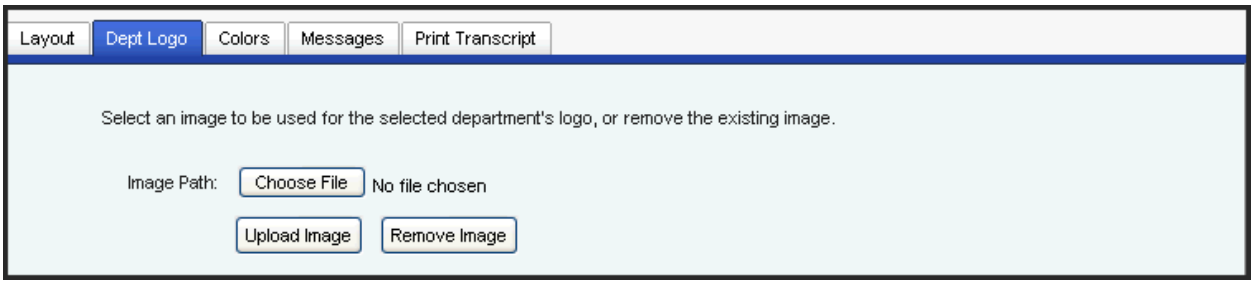
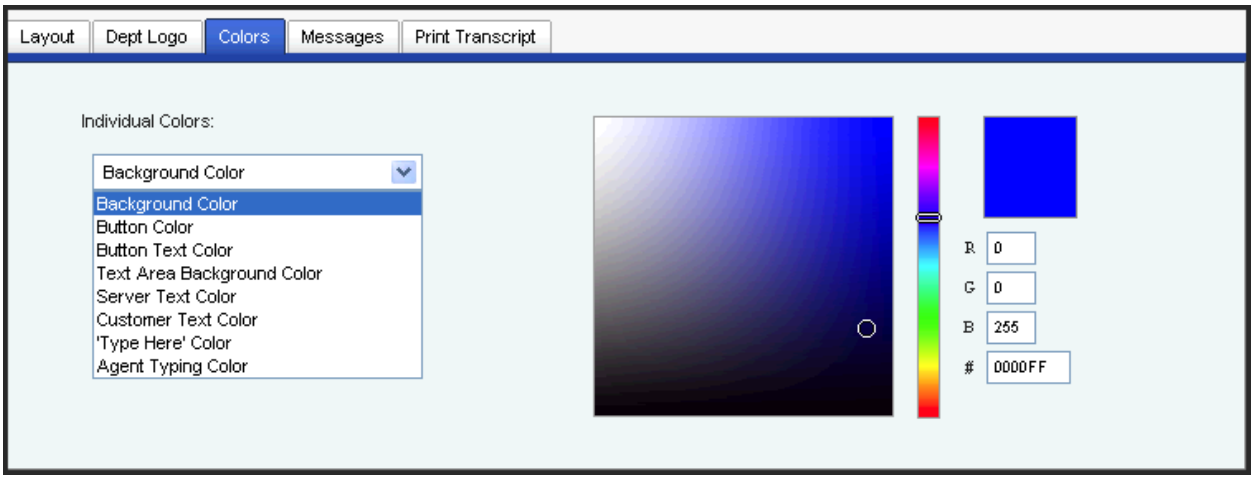


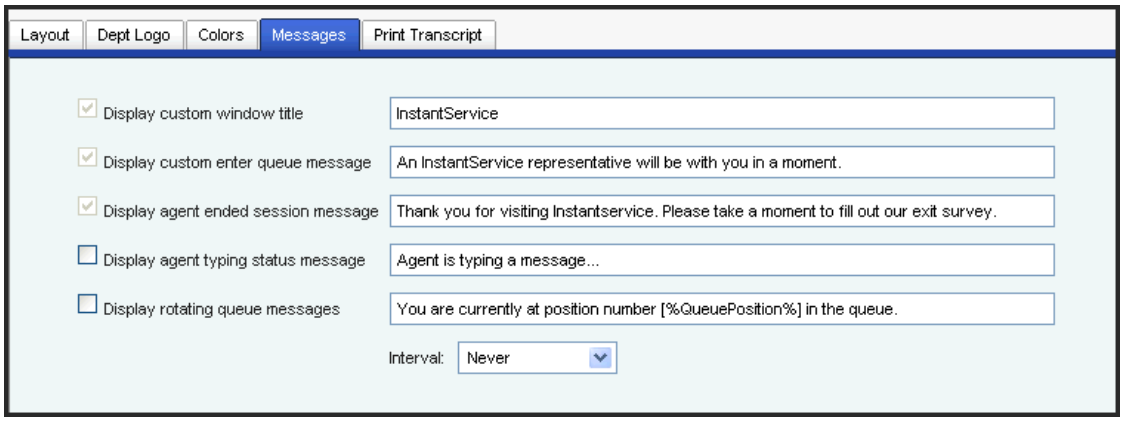

Image requirements consist of the following:

- Must be in **`.gif`**, **`.jpg`**, **`.bmp`**, or **`.png`** format.
- Size must be less than **50K**.
- Displayed in an area **90 x 120** (width x height) pixels.

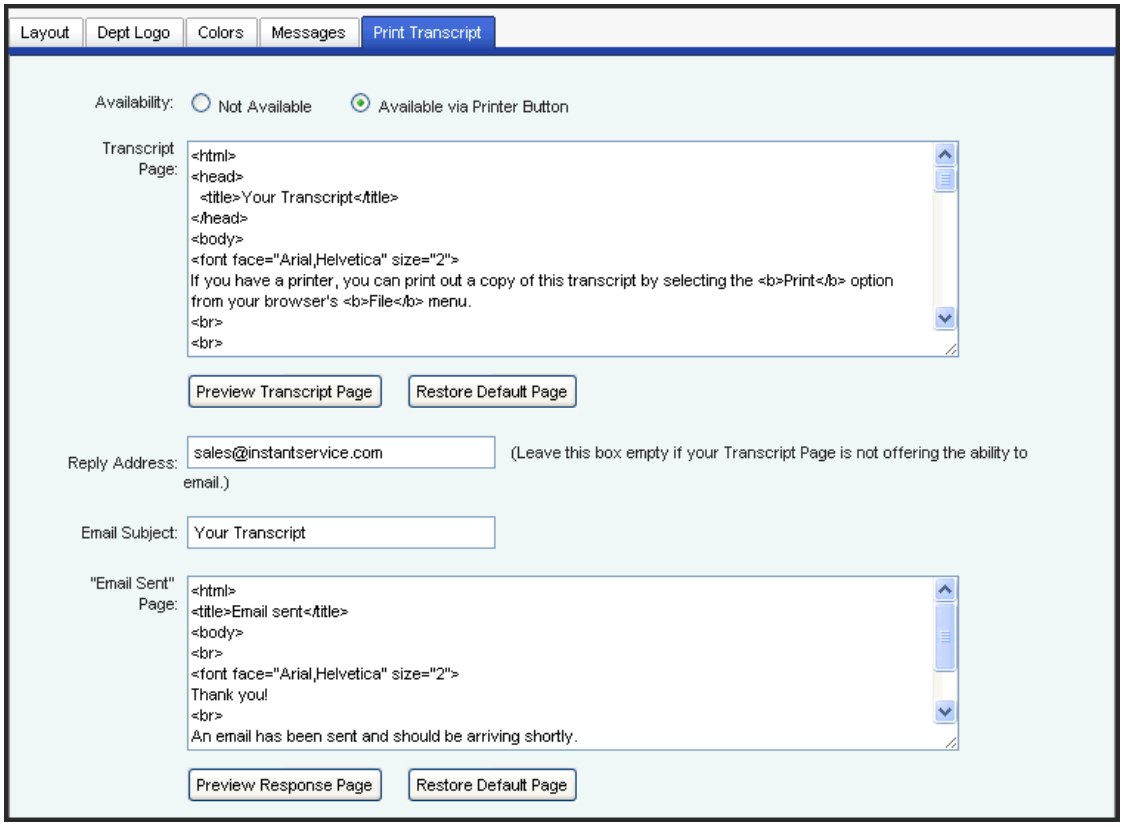
- **Colors:** Choose a color for any or all of eight (8) elements in the customer client interface. Either type the RGB numbers for the color you want to use, type the hexadecimal number in the # field, or use your mouse to select a color from the color field and slider.




- **Messages:** Create and manage the title for the browser window, and the enter queue, agent ended session, agent typing status, and rotating queue messages. For the rotating queue message, select the interval for this message from **Never** to **Every 5 Minutes**.




- **Print Transcript:** Use this tab to do the following:
  - Allow or deny the option for customers to print a copy of the chat transcript.
  - Use or edit HTML to allow for the printing of the chat transcript.
  - Use or edit the reply address, subject, and HTML for the email sent to the customer including the transcript.
  - Preview the page and restore the page to its original defaults.




## Using the New Customer Client Customization

Customization areas for the new customer client have been arranged on the following tabs:

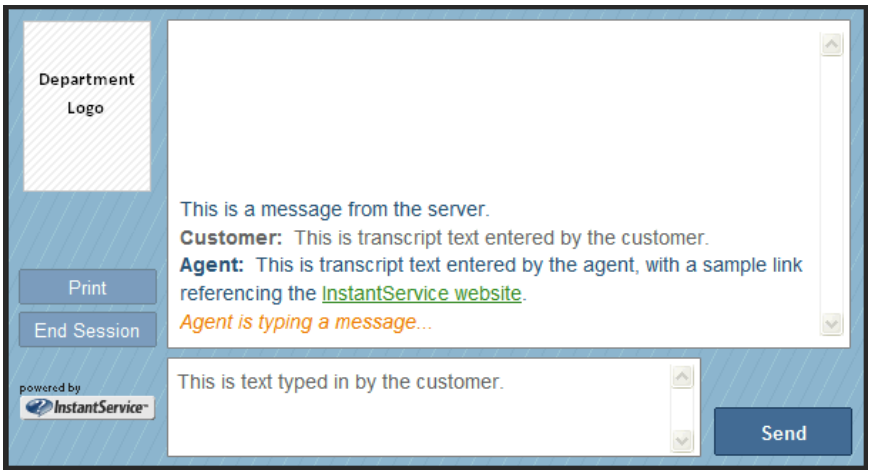
- **Layout:** Select from ten (10) pre-defined layouts. Changes can be made to seven (7) aspects of each layout, and manually or auto-resizing the width and height of the customer client window. Layouts can include company logos and agent images.
- **Background:** Select an image from the included library, upload your own background image, or choose no image. You can also choose how the pattern is repeated on the customer client interface.
- **Department Logos:** Upload a department logo for those layouts that allow logos.
- **Fonts:** Choose the font types and sizes for the transcripts, and customer and agent inputs, and button fonts and weights.
- **Colors:** Choose a font scheme for the customer client interface or select individual colors for 23 different aspects.
- **Messages:** Create and manage the title for the browser window, and the transcript and status messages. The transcript messages support HTML and tokens.
- **Buttons:** Configure the Send button with a custom label or a logo. Create up to five (5) optional buttons associated with pre-defined or custom JavaScript events.

- **Print / Email:** If you allow customers to print or receive a copy of the chat transcript, use or edit HTML to allow for the printing of the chat transcript. Use or edit the reply address, subject, and HTML for the email sent to the customer including the transcript.
- **Copy Settings:** Once you have configured the customer client interface to your specifications, you can copy these settings to some or all of the available departments in the list.

## Layout Tab

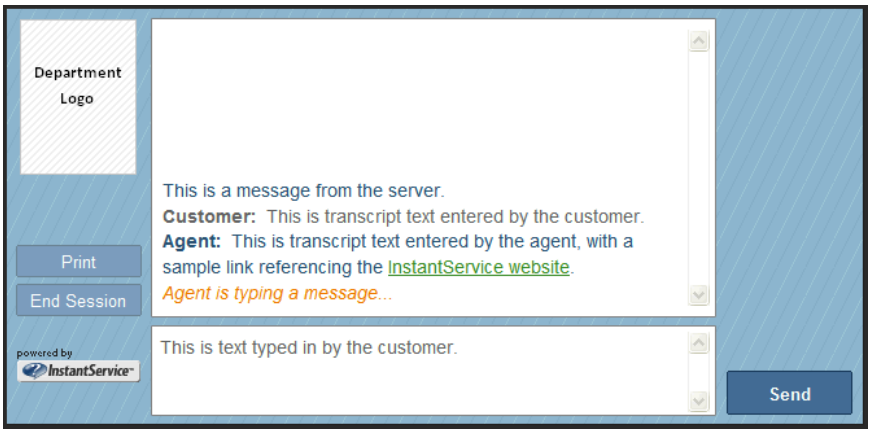
The following are examples of the ten (10) layout schemes available on this tab.

**Note:** Once you select a layout from the menu, you can still make changes to the layout schemes by using the other tabs on this page.



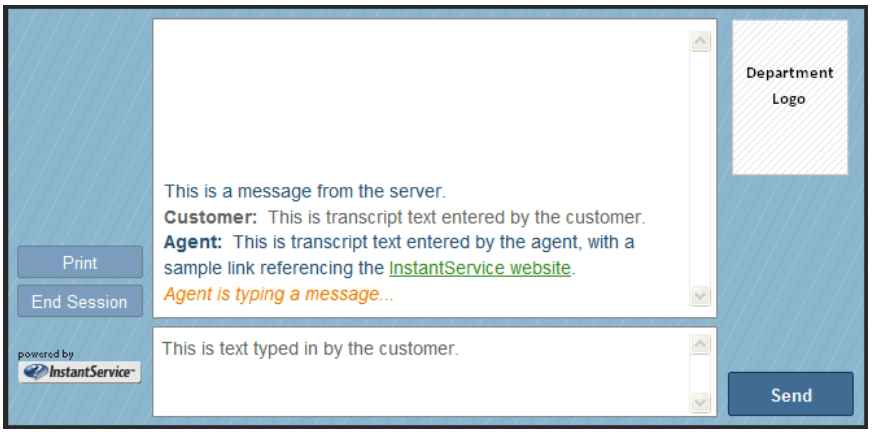

**Layout 1**

- Department Logo at top left
- Optional Buttons at left
- No Agent Image
- Wider Transcript pane; narrower Agent Response pane




**Layout 2**

- Department Logo at top right
- Optional Buttons at left
- No Agent Image
- Narrower Transcript and Agent Response panes




**Layout 3**

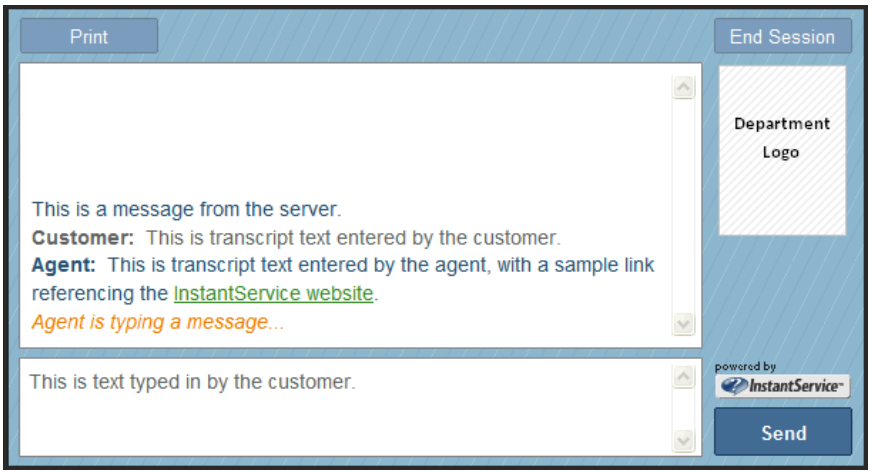
- Department Logo at top right
- Optional Buttons at left
- No Agent Image
- Narrower Transcript and Agent Response panes


**Layout 4**

- Department Logo at top right
- Optional Buttons at right
- No Agent Image
- Wider Transcript and Agent Response panes

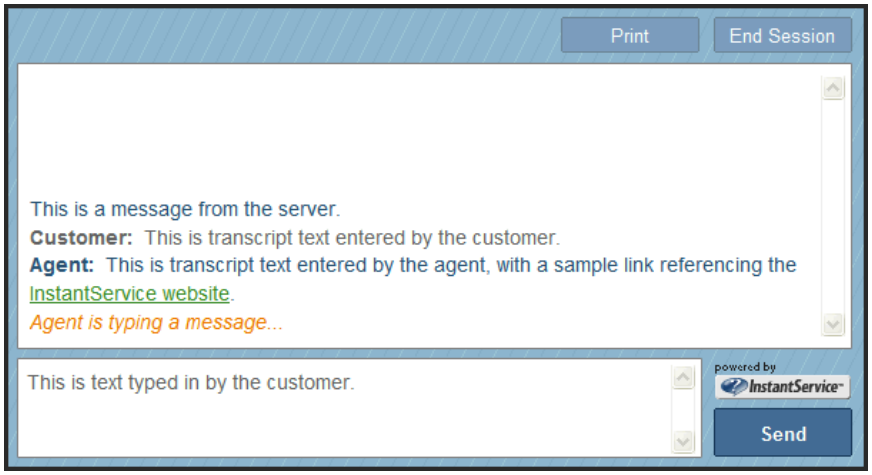

**Layout 5**

- Department Logo at right
- Optional Buttons at top right
- No Agent Image
- Wider Transcript and Agent Response panes



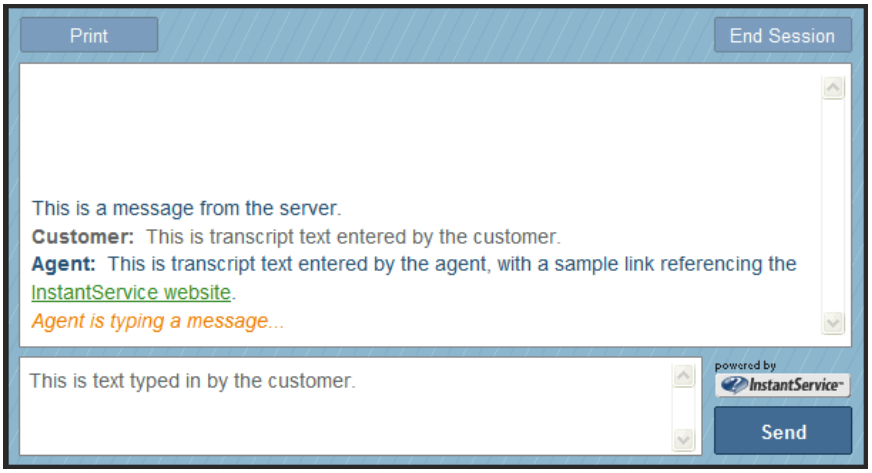

**Layout 6**

- Department Logo at right
- Optional Buttons at top, split
- No Agent Image
- Wider Transcript and Agent Response panes



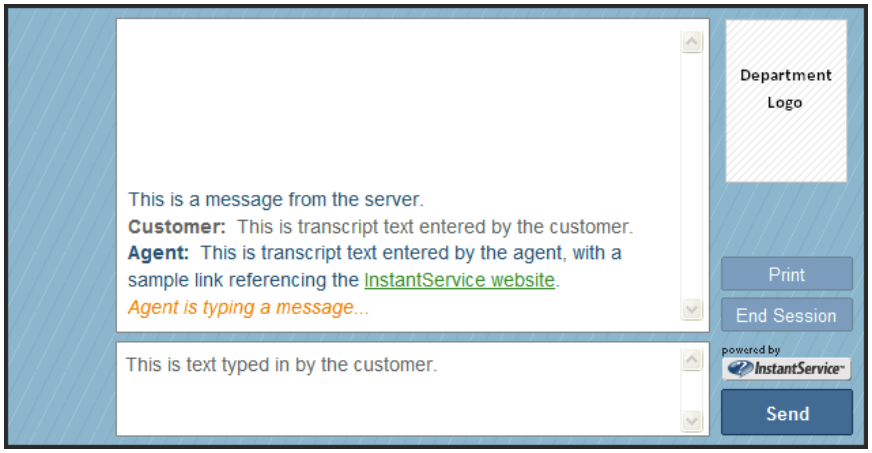

**Layout 7**

- No Department Logo
- Optional Buttons at top
- No Agent Image
- Wider Transcript and Agent Response panes



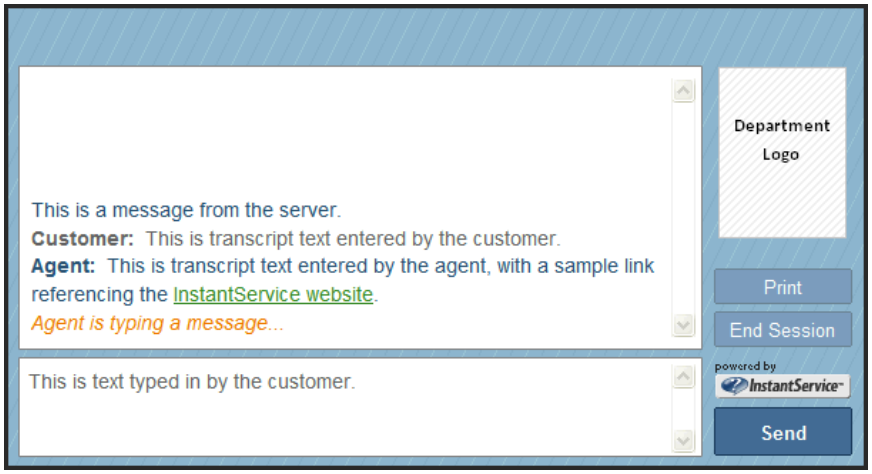

**Layout 8**

- No Department Logo
- Optional Buttons at top, split
- No Agent Image
- Wider Transcript and Agent Response panes




**Layout 9**

- Department Logo at top right
- Optional Buttons at right
- No Agent Image
- Narrower Transcript and Agent Response panes




**Layout 10**

- Department Logo at right
- Optional Buttons at right
- No Agent Image
- Wider Transcript and Agent Response panes

### To configure the Customer Client Interface layout:

1. If you have not already done so, at the top of the page, from the menu, select the department whose configuration you want to change.
2. If not already open, click the **Layout** tab. The active tab is highlighted in blue.
3. From the Chat Layout menu, select a layout from the ten (10) available. The differences in the layouts deal with:
   - Size and positioning of the transcript and input fields.
   - Inclusion and exclusion of the Department Logo and Agent Image fields.

   **Note:** For information on uploading an agent image, see Agents: Personal: Image.

   - Positioning of the **Print** and **Send** buttons.

   **Note:** Take some time to review the different layouts. Realize that the layouts can be regarded as the beginnings of your customization for your customer client interface. Settings for the customer client interface layouts are customizable.

4. Once you have selected an appropriate layout, do one of the following:
   - Click **Save** to accept the layout as is.
   - Use the additional menus to make changes to the layout.
5. If you decide to make additional changes to the layout, use the following menus:
   - **Department Logo:** If available, show or hide the department logo.
   - **Agent Image:** If available, show or hide the agent image. The agent image is uploaded on the Agents: Personal: Image page.
   - **Status Message:** Display non-transcript status in a dedicated user interface (UI) location or display inline in Transcript pane, for example, Agent is Typing text or network connectivity. You can also choose to hide any status messages.
   - **Input Area Height:** Adjust the height of the pane from **70** to **130**.
   - **Transcript Alignment:** Have the transcript text appear from the bottom of the transcript pane upward or from the top downward.
   - **Inner Corners:** Select the corners of the Transcript and Input panes to be squared or rounded in appearance.
   - **Branding:** Select dark or light lettering for branding, if available.

   **Note:** If branding has been disabled for your account, this choice is absent from the tab. Contact InstantService Professional Services for details.

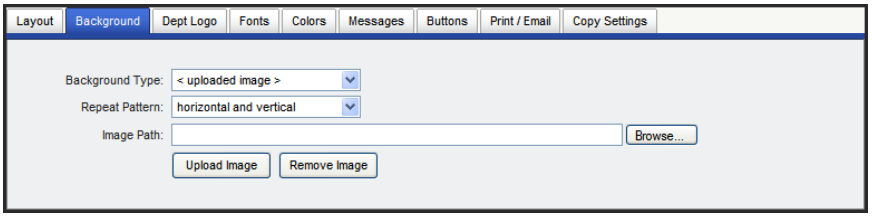
6. Click the Auto Resize check box to adjust the customer client interface automatically. Clear the check box and use the Width and Height sliders to manually adjust the window size.
7. Click **Save** once you have made all changes to this tab.

**Important:** As a best practice, click **Save** after you have completed work on each tab. If you do not click Save prior to leaving this page, those changes that have not been saved cannot be recovered.

## Background Tab

### To configure the Customer Client Interface background:

1. If you have not already done so, at the top of the page, from the menu, select the department whose configuration you want to change.
2. Click the Background tab. The active tab is highlighted in blue.
3. From the **Background Type** menu, do one of the following:
   - Click **No Background Image** to use a neutral gray background. All other menus are hidden.
   - Click **Select Library Image** if you want to choose a background from the available image library.
     - Choices for the image are listed in the **Library Image** menu. There are 32 available images.
     - Click the **Repeat Pattern** menu to select how the library image repeats on the customer client interface: **Horizontal and Vertical**, **Horizontal Only**, and **Vertical Only**.
   - Click **Uploaded Image**. The tab changes to include an **Image Path** field and **Browse** button.




     - In the Image Path field, type the location of the image you want to use as a background, or click **Browse** and locate the image in your files.
     - Click **Upload Image**. The upload is reflected in the preview of the customer client interface on the page. Click **Remove Image** if you want to delete a currently-used image as the background.
     - From the Repeat Pattern menu, select **Horizontal and Vertical**, **Horizontal Only**, and **Vertical Only**.
4. Click **Save** once you have made all changes to this tab.

**Important:** As a best practice, click **Save** after you have completed work on each tab. If you do not click Save prior to leaving this page, those changes that have not been saved cannot be recovered.

## Dept Logo Tab

### To configure the Customer Client Interface department logo:

1. If you have not already done so, at the top of the page, from the menu, select the department whose configuration you want to change.
2. Click the **Dept Logo** tab. The active tab is highlighted in blue. If in the Layout tab, in the Department Logo menu, No Department Logo is selected, this tab is unavailable.
3. In the Image Path field, type the location of the department logo image you want to use, or click **Browse** to locate the image file.

   **Important:** Images must be sized to display in an area 90 X 120 (width x height) pixels, must be **50K** or less in file size, and must be in **`.gif`**, **`.jpg`**, **`.bmp`**, or **`.png`** format.

4. Click **Upload Image**. The logo appears in the Company Logo field in preview example on the page.
5. If you want to delete an image currently being used as a company logo, click **Remove Image**.

   **Note:** When a customer is forwarded from one department to another, the department logo changes in the Customer Client Interface to reflect the logo of the forwarded-to department.

6. Click **Save** once you have made all changes to this tab.

   **Important:** As a best practice, click **Save** after you have completed work on each tab. If you do not click Save prior to leaving this page, those changes that have not been saved cannot be recovered.

## Fonts Tab

### To configure the Customer Client Interface fonts:

1. If you have not already done so, at the top of the page, from the menu, select the department whose configuration you want to change.
2. Click the **Fonts** tab. The active tab is highlighted in blue.

   **Note:** Fonts available for use on the Customer Client Interface are **Arial**, **Verdana**, **Times New Roman**, **Courier**, and **Comic Sans**.

3. On this tab, you can use the following menus to configure the appearance of fonts in the Customer Client Interface:
   - **Transcript & Input Font:** Choose one of the five (5) fonts to appear in the Transcript and Input panes.
   - **Button Font:** Choose one of the five (5) fonts to appear on the buttons.
   - **Send Button Font Weight:** Choices are bold and normal.

- **Custom Button Font Weight:** Choices are bold and normal.
- **Transcript & Input Font Size:** The default and recommended selection is **Scaled**. This allows the customer's browser settings to determine the size of the font that appears. This is especially helpful with some non-English character sets.

  Additional Choices are from **12** to **16 pixels**.

4. Click **Save** once you have made all changes to this tab.

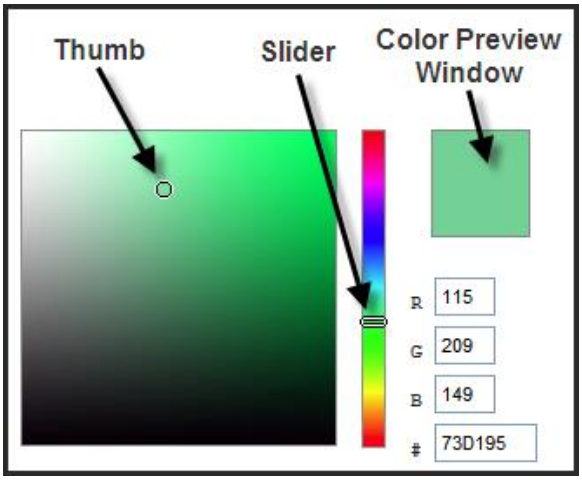
**Important:** As a best practice, click **Save** after you have completed work on each tab. If you do not click Save prior to leaving this page, those changes that have not been saved cannot be recovered.

## Colors Tab

### To configure the Customer Client Interface colors:

1. If you have not already done so, at the top of the page, from the menu, select the department whose configuration you want to change.
2. Click the **Colors** tab. The active tab is highlighted in blue.
3. In the Base Color Scheme menu, either accept the default color scheme as represented in the example on the page or choose from nine (9) other schemes.
4. You can also use the Individual Colors menu to set the colors for 23 interface components, for example, **Transcript - Background Color**. To change individual colors:
   - Select the component you want to change from the Individual Colors menu.
   - Set the color by doing one of the following:
     - In the **#** field, type the six-digit hexadecimal color code, for example, the color **Red** is **`FF0000`**.
     - In the **R**, **G**, and **B** fields, type the number for the color you want. For example, the color **Red** is **R – 255**, **G – 0**, and **B – 0**.

- Use your mouse to click-and-drag to move the slider and thumb to locate your color. The Color Preview window shows you a sample of the color. The **RGB** and # fields change to reflect the associated color.




The changes appear on the customer client interface sample on the page.

5. Once you have completed making color changes to the components, click **Save**.

**Important:** As a best practice, click **Save** after you have completed work on each tab. If you do not click Save prior to leaving this page, those changes that have not been saved cannot be recovered.

## Messages Tab

### To configure the Customer Client Interface messages:

1. If you have not already done so, at the top of the page, from the menu, select the department whose configuration you want to change.
2. Click the **Messages** tab. The active tab is highlighted in blue.
3. Click the check boxes to activate the messages you want to appear in the Customer Client Interface. Available messages include the browser window title, Transcript messages, and Status messages.
4. In the associated fields, type the message text you want to appear.

**Note:** HTML and tokens are supported in the only.

5. If you have selected the **Display Rotating Queue Message** check box, use the Message Interval menu to choose the interval length from **Never** to **Every 5 Minutes**.

**Note:** Rotating text messages also appear to customers assigned in queue to an agent via AQD but not yet taken into session.

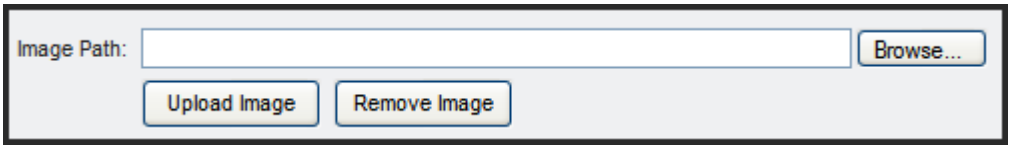
6. Once you have made all your changes to this tab, click **Save**.

**Important:** As a best practice, click **Save** after you have completed work on each tab. If you do not click Save prior to leaving this page, those changes that have not been saved cannot be recovered.

## Buttons Tab

### To configure the Customer Client Interface buttons:

1. If you have not already done so, at the top of the page, from the menu, select the department whose configuration you want to change.
2. Click the **Buttons** tab. The active tab is highlighted in blue.
3. You can make changes to the Send button and five (5) optional buttons. The optional buttons have events associated to them.
4. Make the following choices for the **Send** button:
   - **Send**
   - **Custom Label:** Click this selection, and type the new label in the **Label** field.
   - **Uploaded Image:** Click this selection, and an Image Path field appears with a Browse button.
     - Type the path to your image, or click **Browse** to locate the file you want to use.
     - Click **Upload Image** to add the image to the button, or click **Remove Image** to clear a current image from the button.




**Note:** The following are upload image requirements:

- The image must be in a `.gif`, `.jpg`, `.bmp`, or `.png` file format.
- File size is limited to **50K**.
- The **Send button** image must be sized to **95 x 30** (width x height) pixels.
- **Optional buttons** must be sized to **95 x 21** (width x height) pixels.

5. Make the following choices for the optional buttons:
   - **Not Used**
   - **End Session**
   - **Print**
   - **Custom Label:** See the previous step for details.
   - **Uploaded Image:** See the previous step for details.

**Note:** Custom code can be written to hide or show the optional buttons. You can also initiate multiple events with a single button click. For example, an **End Session** button can be configured to end a co-browse session and present an exit survey to a customer. For more information, contact InstantService Professional Services.

6. For each optional button you use, use the associated **Event** menu. Choices for Events include:
   - None
   - End Chat Session
   - Print / Email Transcript
   - Show Customer Survey
   - Close Chat Window
   - Custom Events

**Note:** Click the **Show Custom Event JavaScript** link for currently configured custom JavaScript. For more details on custom events, contact InstantService Professional Services.

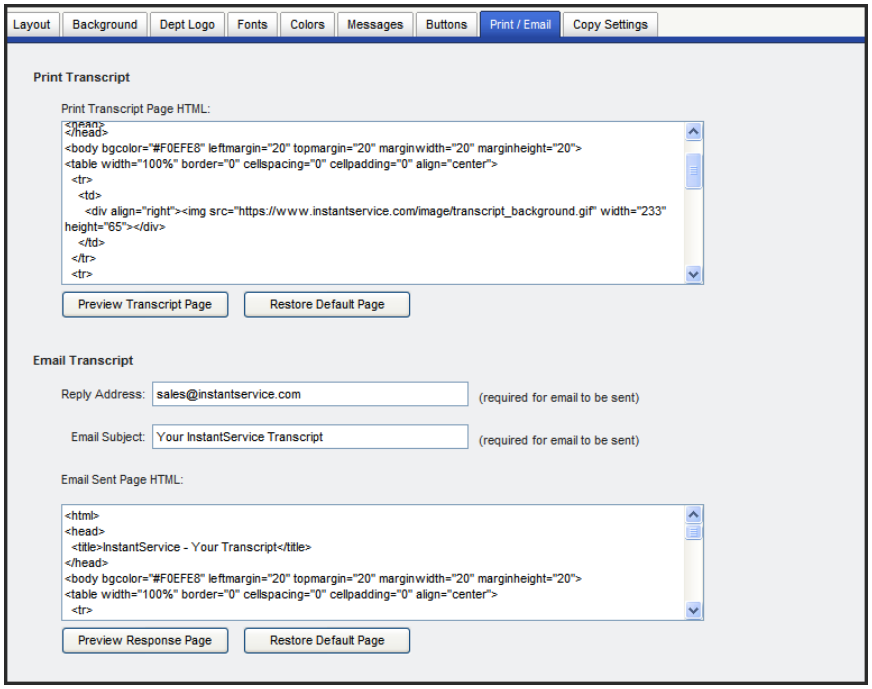
7. Once you have made all your changes to this tab, click **Save**.

**Important:** As a best practice, click **Save** after you have completed work on each tab. If you do not click Save prior to leaving this page, those changes that have not been saved cannot be recovered.

# Print / Email Tab

### To configure the Customer Client Interface print and email transcript:

1. If you have not already done so, at the top of the page, from the menu, select the department whose configuration you want to change.
2. Click the **Print / Email** tab. The active tab is highlighted in blue.




3. Use the HTML samples as-is, or make any necessary changes to the HTML code for the Print Transcript Page and Email Sent Page.
4. Click the **Preview Transcript Page** and **Preview Response Page** buttons to review your changes for each page.
5. Click the **Restore Default Page** button to delete any changes you have made and return to the original version of the HTML code to each page.
6. For the Email Transcript, type the address and subject in fields. These are required fields for the email to be sent.
7. Once you have made all your changes to this tab, click **Save**.

**Important:** As a best practice, click **Save** after you have completed work on each tab. If you do not click Save prior to leaving this page, those changes that have not been saved cannot be recovered.

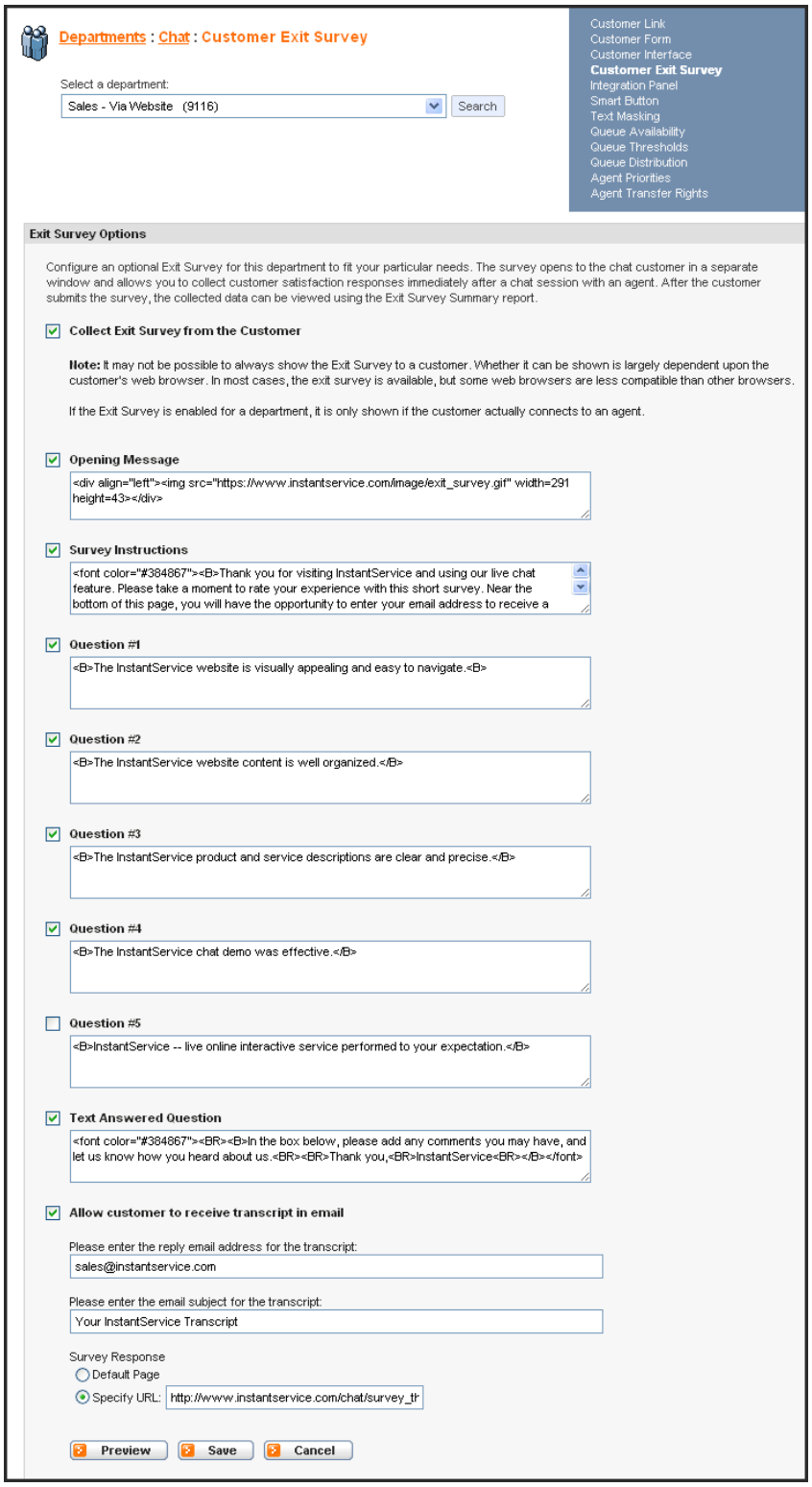
## Copy Settings Tab

### To copy your Customer Client Interface settings to other departments:

1. Complete any custom changes to a department you have chosen using the eight (8) other tabs. See the previous procedures for details.
2. Click the **Copy Settings** tab. The active tab is highlighted in blue.
3. Use this tab to copy (or *clone*) the changes you have made on one department to one or more other departments for which you have change permissions. Do the following:
4. Check the **Copy From Department** name to ensure this is the department whose settings you want to use for other departments. To change the name that appears on this line, at the top of the page, select a different department from the menu.
5. In the To Department(s) pane, click to select one or more departments. You can use **Click +** `Ctrl` key and **Click +** `Shift` key to select multiple departments.
6. Once you have selected the department or departments you want to copy the department settings to, click **Copy Settings**.
7. Click **OK** to accept the replacing of all customer interface settings, or click **Cancel** to stop the replacement.
8. Click **OK** on the Department Settings Copied dialog.
9. Once you have completed all copy activities, click **Save**.

**Important:** As a best practice, click **Save** after you have completed work on each tab. If you do not click Save prior to leaving this page, those changes that have not been saved cannot be recovered.

## Customer Exit Survey




The Exit Survey allows you to collect information on customer satisfaction from a site visitor once a chat session with one of your agents is complete. This exit survey, with its customizable questions, appears once the visitor has exited the session.

After the customer submits the survey, he or she is directed to the Configured Survey Response page. The data is then available in the Exit Survey Summary report.

If during a chat, a customer is forwarded to another department, the Exit Survey is delivered to the customer from the forwarded-to department rather than from the initial contact department. From a reporting standpoint, this action satisfies the need to collect data from the department providing customer service rather than the unaffected, initial department.

**Note:** To customize the appearance and function of the Exit Survey, see the Customer Form section of this manual.

### To create an Exit Survey:

1. Select a department from the menu.
2. Select the **Collect Exit Survey from the Customer** check box to allow the collection of survey information.
3. To enter an opening message and survey instructions, select those check boxes and type the message in the text box.

   **Note:** All text boxes allow for the use of HTML to further customize the survey.

4. To create the questions for the survey, select the Question check box and type the question text in the box.

   **Note:** Select up to five (5) check boxes for the number of **rated-response** survey questions you want to offer. The five possible responses go from **Strongly Agree** to **Strongly Disagree**.

5. Select the Text Answered Question check box to include a free-form text box for customer answers.
6. Select **Allow Customer to Email Transcript** to allow customers to enter their email address and receive a copy of the session transcript. Type your customer service email address as the return email.

   **Note:** This address appears in the From address in the email sent to the customer.

7. Under Survey Response, do one of the following:
   - Click the **Default Page** option to use the InstantService-provided thank-you page, or


   - Click the **Specify URL** option to create a customized page. Type the location of the survey response page in the box.
8. Click **Save**.

## Chat Integration Panel

You can specify an integration panel URL for each department. The integration panel is displayed in the Agent Console during a chat session.

You may include tokens in your URL. The token is replaced at the time the integration panel is loaded.

The character limit for the URL field is **1000** characters. The character limit for the Tab Label field is **32** characters.

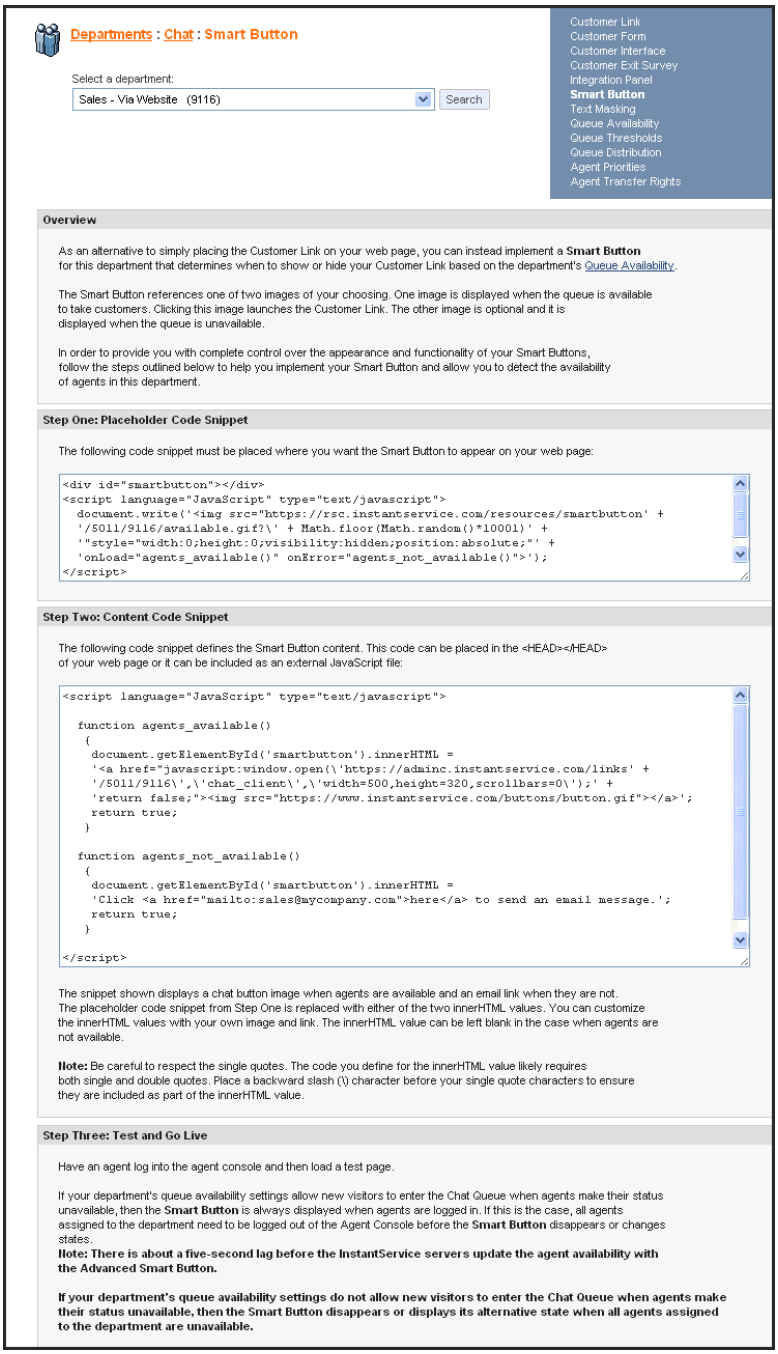
If tokens are used in the URL, the length of the substituted token value is counted as part of the total length of the URL.

### To specify a department-specific integration panel for chat:

1. At the top of the page, use the menu to select a department.
2. In the fields, type a URL web address and label for the integration panel you want displayed.
3. Leave both the URL and Label fields blank if you do not want to use a department-specific integration panel for chats for the selected department.

**Note:** Integration panels are embedded web browsers within the Agent Console that allow access to an external web application. Integration panels are only supported on a **modern version of the Microsoft Windows platform with Internet Explorer**.

## Smart Button



Departments : Chat : Smart Button

Select a department:

Sales - Via Website (9116) Search

Customer Link
Customer Form
Customer Interface
Customer Exit Survey
Integration Panel
**Smart Button**
Text Masking
Queue Availability
Queue Thresholds
Queue Distribution
Agent Priorities
Agent Transfer Rights

**Overview**

As an alternative to simply placing the Customer Link on your web page, you can instead implement a **Smart Button** for this department that determines when to show or hide your Customer Link based on the department's Queue Availability.

The Smart Button references one of two images of your choosing. One image is displayed when the queue is available to take customers. Clicking this image launches the Customer Link. The other image is optional and it is displayed when the queue is unavailable.

In order to provide you with complete control over the appearance and functionality of your Smart Buttons, follow the steps outlined below to help you implement your Smart Button and allow you to detect the availability of agents in this department.

**Step One: Placeholder Code Snippet**

The following code snippet must be placed where you want the Smart Button to appear on your web page:

```
<div id="smartbutton"></div>
<script language="JavaScript" type="text/javascript">
  document.write('<img src="https://rsc.instantservice.com/resources/smartbutton' +
  '/5011/9116/available.gif?\' + Math.floor(Math.random()*10001)' +
  '"style="width:0;height:0;visibility:hidden;position:absolute;"' +
  'onLoad="agents_available()" onError="agents_not_available()">');
</script>
```

**Step Two: Content Code Snippet**

The following code snippet defines the Smart Button content. This code can be placed in the <HEAD></HEAD> of your web page or it can be included as an external JavaScript file:

```
<script language="JavaScript" type="text/javascript">

  function agents_available()
   {
    document.getElementById('smartbutton').innerHTML =
    '<a href="javascript:window.open(\'https://adminc.instantservice.com/links' +
    '/5011/9116\',\'chat_client\',\'width=500,height=320,scrollbars=0\');' +
    'return false;"><img src="https://www.instantservice.com/buttons/button.gif"></a>';
    return true;
   }

  function agents_not_available()
   {
    document.getElementById('smartbutton').innerHTML =
    'Click <a href="mailto:sales@mycompany.com">here</a> to send an email message.';
    return true;
   }

</script>
```

The snippet shown displays a chat button image when agents are available and an email link when they are not. The placeholder code snippet from Step One is replaced with either of the two innerHTML values. You can customize the innerHTML values with your own image and link. The innerHTML value can be left blank in the case when agents are not available.

**Note:** Be careful to respect the single quotes. The code you define for the innerHTML value likely requires both single and double quotes. Place a backward slash (\) character before your single quote characters to ensure they are included as part of the innerHTML value.

**Step Three: Test and Go Live**

Have an agent log into the agent console and then load a test page.

If your department's queue availability settings allow new visitors to enter the Chat Queue when agents make their status unavailable, then the **Smart Button** is always displayed when agents are logged in. If this is the case, all agents assigned to the department need to be logged out of the Agent Console before the **Smart Button** disappears or changes states.
**Note: There is about a five-second lag before the InstantService servers update the agent availability with the Advanced Smart Button.**

**If your department's queue availability settings do not allow new visitors to enter the Chat Queue when agents make their status unavailable, then the Smart Button disappears or displays its alternative state when all agents assigned to the department are unavailable.**

The Smart Button allows you to display dynamic HTML on your web pages based upon specific department queue availability. For instance, when a department queue is open, your web page can display an image inviting the visitor to chat with an agent. When the queue is unavailable, an optional image can be displayed inviting the visitor to send an email instead of chat.

Integration of the Smart Button requires a working knowledge of HTML and JavaScript. You must place a snippet of JavaScript code on your web pages in the locations you want your dynamic HTML to appear. This activity is identified on the Smart Button page as **Step One: Placeholder Code Snippet**.

To detect whether a department queue is available or unavailable, an additional piece of JavaScript must also be placed on the page, although it may appear either at the top of the page or be referenced in an external JavaScript file. This activity is identified on the Smart Button page as **Step Two: Content Code Snippet**.

### To integrate the Smart Button link with your website:

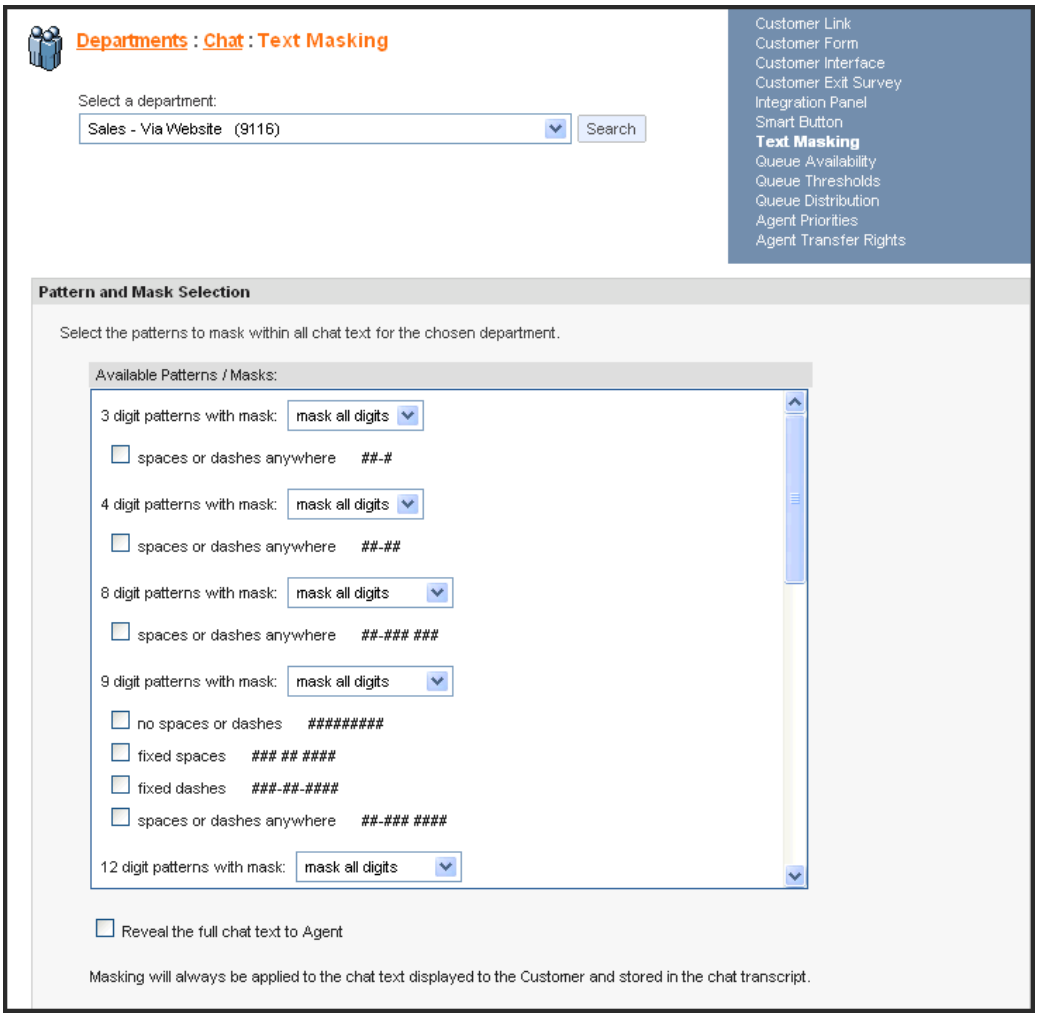
1. Select a department from the menu.
2. Copy the JavaScript from the Step One: Placeholder Code Snippet panel and place it on your web page in the location you want to display the Smart Button.
3. Copy the JavaScript from the Step Two: Content Code Snippet panel and place it at the top of your page, or put it in a separate file and reference it externally from the page.
4. Modify the Content Code Snippet, and update the HTML images and content to appear in the queue available and unavailable states.
5. Complete testing to ensure the Smart Button behaves correctly on your web page.

## Text Masking

You can choose to protect sensitive customer chat text by using pre-defined text masks. This functionality provides added security for information such as social security or credit card numbers.

An option is available to display the text unmasked to agents but still have it masked when shown to customers or when stored in the database.

> **Important:** You may encounter a situation where credit card numbers or other sensitive data are not masked even though text masking appears to be enabled for the involved departments. This is often caused by having **some departments with text masking enabled and other departments with text masking disabled**. If the initial department, with text masking enabled, transfers a chat to another department without text masking, all subsequent text is not masked.
>
> As a best practice, we recommend text masking be enabled for all departments to avoid a similar situation.




## To use chat text masking:

1. Select a department for masking. The patterns selected are used to mask all customer chat text occurring in that department.

   **Note:** The department selection list contains all departments to which the logged-in agent is assigned, including the Account (Default) department.

2. In the Available Patterns/Masks pane, click any or all of the check boxes corresponding to the patterns you want to use for masking. Selecting the **Spaces or Dashes Anywhere** check box includes the other three pattern options, so all possible combinations of numbers with or without spaces or dashes are masked.

   **Note:** The # symbol is used as the masking replacement character.

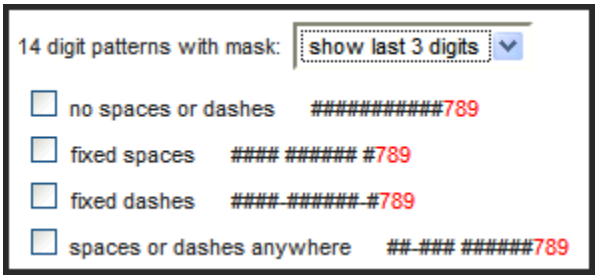
Available patterns include:

- 3-digit patterns with mask:
  - Spaces or dashes anywhere ##-### ###
- 4-digit patterns with mask:
  - Spaces or dashes anywhere ##-### ###
- 8-digit patterns with mask:
  - Spaces or dashes anywhere ##-### ###
- 9-digit patterns with mask:
  - No spaces or dashes #########
  - Fixed spaces ### ## ####
  - Fixed dashes ###-##-####
  - Spaces or dashes anywhere ##-### ####
- 12-digit patterns with mask:
  - Spaces or dashes anywhere ##-### #######
- 13-digit patterns with mask:
  - Spaces or dashes anywhere ##-### ########
- 14-digit patterns with mask:
  - No spaces or dashes ##############
  - Fixed spaces #### ###### ####
  - Fixed dashes ####-######-######
  - Spaces or dashes anywhere ##-### #########
- 15-digit patterns with mask:
  - No spaces or dashes ###############
  - Fixed spaces #### ###### #####
  - Fixed dashes ####-######-#####
  - Spaces or dashes anywhere ##-### ##########
- 16-digit patterns with mask:
  - No spaces or dashes ################
  - Fixed spaces #### #### #### ####
  - Fixed dashes ####-####-####-####
  - Spaces or dashes anywhere ##-### ###########
- 17+ digit patterns with mask:
  - Spaces or dashes anywhere ##-### ############

3. From the menu associated with each pattern choice, click the button, and select the amount and position of digits you want to display. The options include:
   - Mask all digits (This is the default setting)
   - Show last 4 digits
   - Show last 3 digits
   - Show last 2 digits
   - Show first 4 digits

   For 3- and 4-digit patterns, the only option is to mask all digits.

   **Note:** The sample masked string is updated when you change the mask selection to indicate what the masked string will look like with those settings. For example, selecting to mask last 4 digits shows `123-45-####`. See the following graphic for details for a 14-digit pattern.




4. If you want the full chat text to be revealed to your agents, select the check box under the Available Patterns/Masks pane.

   **Note:** All chat text viewed by the customer is masked regardless of whether or not this option is selected. This includes the text in the Customer Client, the chat transcript viewed via the Print Transcript feature, and any transcript received by the customer via email.

5. Click **Save**.

## Text Masking Changes Available in the Agent Console

Use the following criteria to determine if changes you make to text masking settings are available to your agents in the Agent Console:

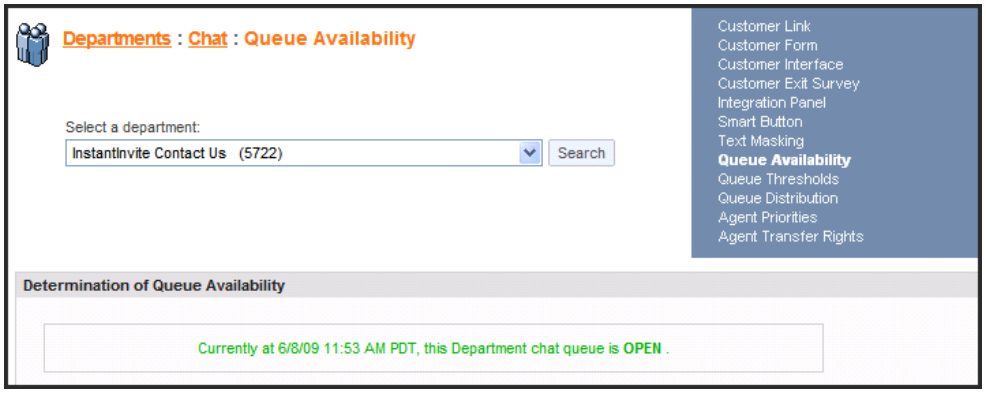
- If the settings are changed in Account Administration while an agent has the Agent Console open with **no chat in session**, the **agent must close and re-launch the console** in order for him or her to see the new settings.
- If the settings are changed while an agent is logged into the Agent Console and has a **chat in session**, if the agent closes the console and then re-launches, he or she is **re-connected to the chat with the old settings in place**. The **chat must end**, and the agent must **close and re-launch the Agent Console** again to see the new settings.

### Pattern Application

The following table shows examples of the cards and information associated with each pattern. For more information, go to: **`http://en.wikipedia.org/wiki/Bank_card_number`**

| Pattern | Associated Card or Information |
|---|---|
| 3 digits | Card Security Code (CSC)/Card Validation Code (CVC), per MasterCard, Visa, Discover, Diners Club, JCB credit and debit cards |
| 4 digits | Unique Card Code (CID), per American Express |
| 8 digits | A customer leaves a digit off of a SSN/SSI |
| 9 digits | Typical SSN/SSI |
| 12 or 13 digits | A customer leaves a digit off a credit card number |
| 14 digits | Diners Club International, Diners Club Carte Blanche |
| 15 digits | American Express |
| 16 digits | Diners Club (US and Canada), Discover Card, JCB, MasterCard, Visa |
| 17+ digits | Multiple SSN/CC numbers are entered in sequence without any words in between |

## Queue Availability



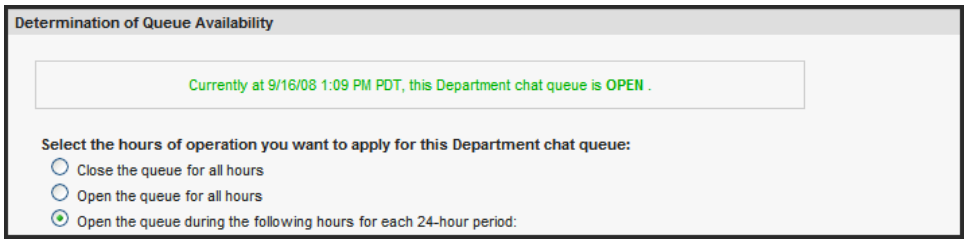

Customize your queue availability setting for all your departments. You can configure the hours of operations for your chat queues separately for each day of the week and weekends. You can define open and close time for up to three shifts per day. This provides flexibility in matching your chat queues to your agent shifts.

### Factors

The factors determining queue availability are:

- Queue hours of operation (opened or closed).
- Department availability.
- Agent availability.

## Determination of Queue Availability




You can choose to open or close your department Chat Queue by selecting one of the following options:

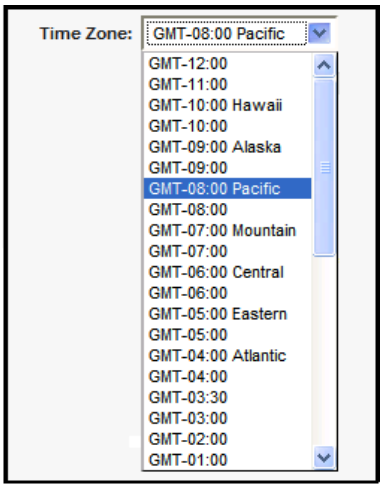
**Note:** In addition, use the Smart Button to customize the behavior of your Chat Link to provide customers with alternatives when the Chat Queue is closed.

- **Close the Queue for All Hours:** This option immediately closes the queue and prevents customers from entering the queue. The queue is closed until you select one of the other options.
- **Open the Queue for All Hours:** Depending on the Agent Availability setting you select, this option may allow customers to enter the queue.
- **Open the Queue During the Following Hours for Each 24-Hour Period:** Depending on the Agent Availability setting you select, this option may allow customers to enter the queue during the time periods you select for a given 24-hour period. This applies for each day of the week or weekend.

  You can choose to open the queue from **one to three shifts** during the 24 hours. The queue is closed outside the time periods you select.

**Note:** If a queue period is enabled, and the start and end times are the same, it is assumed that the queue is open for 24 hours, going into the next day. For example, 12:00 AM - 12:00 AM or 6:45 PM - 6:45 PM are allowed selections, and the system assumes this to mean a 24-hour period.

## Time Zone




- You can select the specific time zone for your department.
- Choices include Greenwich Mean Time Zones. The following time zones are further identified by name: **Hawaii**, **Alaska**, **Pacific**, **Mountain**, **Central**, **Eastern**, and **Atlantic**.

**Note:** InstantService automatically makes time changes for Daylight Saving and Standard Time for the named time zones—**Hawaii**, **Alaska**, **Pacific**, **Mountain**, **Central**, **Eastern**, and **Atlantic**. If you select any of the other time zones, you must maintain your own time changes for your location.

## Day and Queue Hours


- You can set up your queue hours for each individual day—Monday through Sunday—or set up the Monday queue hours and click the **Apply These Settings to Every Day of the Week** icon to have the schedule apply to the entire week, including the weekend.

  By choosing the same Open and Close time—for example, 5:30 AM to 5:30 AM—the system assumes this to be a 24-hour period, going into the next day.

  **Note:** Even if you click the Apply Settings to Every Week Day icon, you can still make changes to individual days of the week, creating your own unique queue schedule. Click **Save** when you are done.

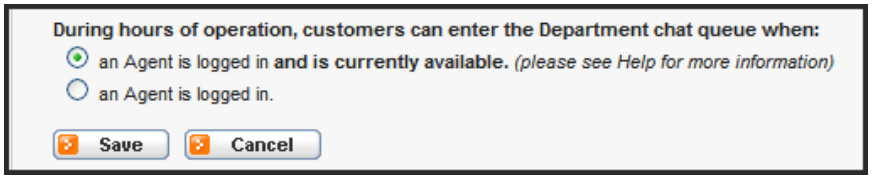
- Select or clear the check boxes in front of each daily shift to include or exclude open shifts from the queue.

**Important:** Queue times are inclusive. If there are any overlaps, the queue has the potential of remaining open.

For example, if your first shift is from 10 AM to 1 PM and your second shift is from 12 PM to 4 PM, depending upon the Agent Availability you select, the queue can potentially be open from 10 AM to 4 PM without closing.

Double check your times to ensure your queues are open during the correct hours.

## Agent Availability




When the queue is open, you can select one of the following options:

- Allow customers to enter the queue if there is at least one agent logged in, regardless of whether the agent is available or not. As long as you have agents logged in, customers can enter the queue and wait for an available agent.
- Allow customers to enter the queue only if there is at least one agent logged in **and** the agent is available to take the customer. This option prevents the queue from becoming overloaded when all the agents assigned to that department have reached their maximum number of chat sessions.

Use the Smart Button to provide customers with alternatives to chat.

**Important:** Remember to click **Save** when you have finished your changes.

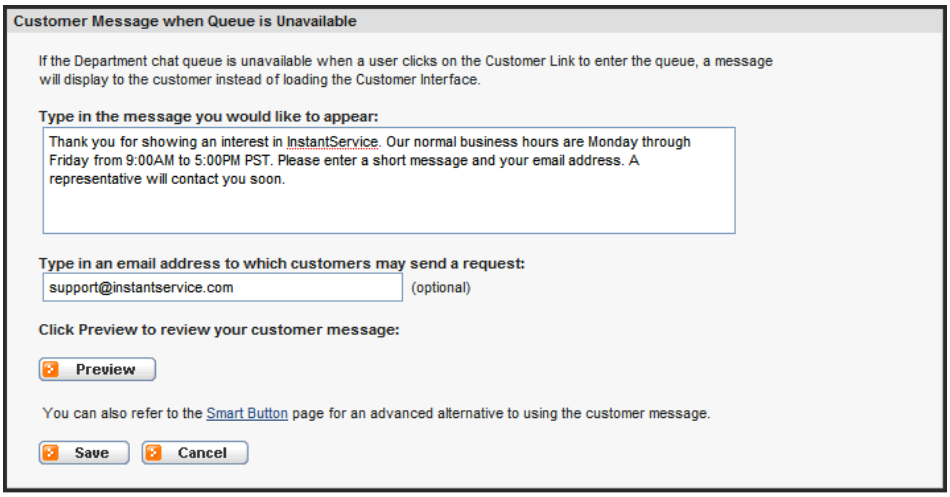
## Queue Availability Scenarios

| Scenario 1: | Description |
|---|---|
| **Monday (All Weekdays, Saturday, and Sunday)**<br>Shift 1: 09:00 AM to 12:00 PM<br>Shift 2: 01:00 PM to 06:00 PM<br>Shift 3: 07:00 PM to 10:00 PM<br><br>**Time Zone**<br>GMT-08:00 Pacific<br><br>**Agent Availability Option:**<br>Customers can enter the Chat Queue when an Agent is logged in and is currently available. | These settings open the queue from 9 AM to 12 PM, 1 PM to 6 PM, and 7 PM to 10 PM, Pacific Time.<br>The queue is closed from 12 PM to 1 PM, 6 PM to 7 PM, and 10 PM to 9 AM.<br>Click the icon to apply these hours to all days of the week, including Saturday and Sunday.<br>Customers are able to chat with agents as soon as they log in and identify themselves as being available. |

| Scenario 2: | Description |
|---|---|
| **Monday (All Weekdays)**<br>Shift 1: 09:00 AM to 12:00 PM<br>Shift 2: 01:00 PM to 06:00 PM<br>Shift 3: 07:00 PM to 10:00 PM<br>**Saturday and Sunday**<br>Queue is not open<br>**Time Zone**<br>GMT-05:00 Eastern<br>**Agent Availability Option:**<br>Customers can enter the Chat Queue when an Agent is logged in. | Create the same settings as you did in Scenario 1 and click the icon to make the times the same for all days.<br>Clear the check boxes for all shifts on Saturday and Sunday to keep your queue closed on those two days.<br>Customers are able to chat with agents as soon as they log in. |

| Scenario 3: | Description |
|---|---|
| **Monday through Friday**<br>Queue is not open<br>**Saturday and Sunday**<br>Shift 1: 09:00 AM to 12:00 PM<br>Shift 2: 01:00 PM to 06:00 PM<br>Shift 3: 07:00 PM to 10:00 PM<br>**Time Zone**<br>GMT<br>**Agent Availability Option:**<br>Customers can enter the Chat Queue when an Agent is logged in. | Select the times for the three Saturday and Sunday queue shifts.<br>To close the queue during the week, clear the check boxes for all shifts for Monday through Friday.<br>Customers are able to chat with agents as soon as they log in. |

## Custom Message for Queue Unavailability




You can create a unique message for the department that the customer sees when the queue is unavailable, as defined by the Queue Availability settings.

**Note:** For more information, see Chat Queue Availability Factors.

This message is displayed inside the Customer window in place of the Customer Chat interface.

If you specify an email address, your customers can send you a message at that address when the queue is unavailable. The customer does not see the email address, but it does provide an additional opportunity for your customer to contact you. The email address is optional.

### To configure your custom message for Queue Unavailability:

1. Select a department from the menu.
2. Ensure you have completed the desired options under Determination of Queue Availability.
3. Type your desired customer message in the text box.
4. Type the optional email address at which you want to receive messages sent by your customers.
5. Click **Preview** to view your message as customers will see it.

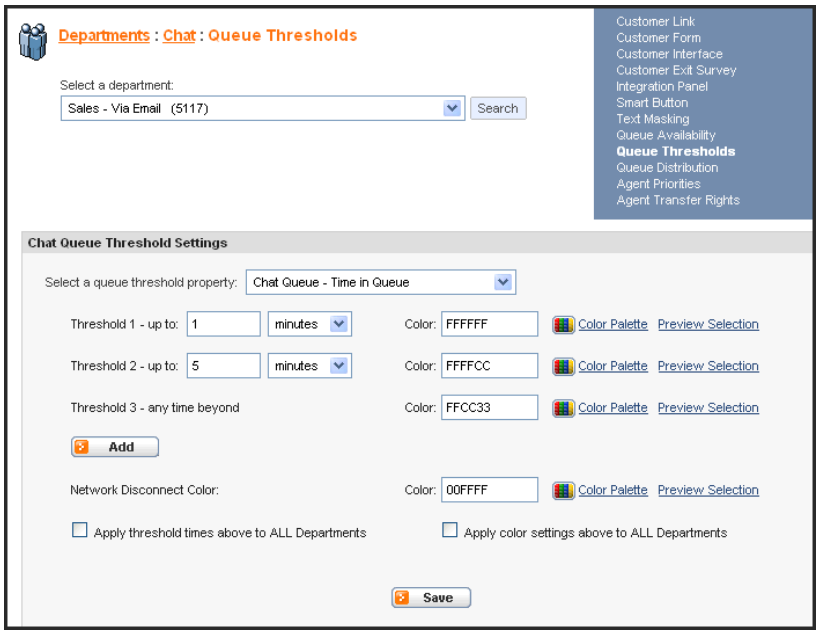
**Note:** The appearance and functionality of your custom message is determined by settings on the Customer Form page for a department.

6. Click **Save**.

**Note:** If you allow the Smart Button feature for your account, you can use it as an alternative to the custom message for Queue Unavailability. For information on this option, see the Smart Button section.

## Chat Queue Thresholds

When a customer enters the Chat Queue, an agent sees the new chat in the Agent Console. You can set service level thresholds that are visually represented by a color change, which indicates when a waiting chat passes the predetermined threshold. These color changes immediately alert agents and supervisors to missed service levels.



You can select any or all of the following queue threshold properties to configure:

- **Chat Queue – Time in Queue**
- **Chat Sessions – Time in Session**
- **Chat Sessions – Agent Response Time**
- **Chat Sessions – Customer Response Time**

You can specify threshold colors and times per department per queue threshold property—for example, **Sales** and **Time in Session**—or you can set a threshold property or properties for all departments to identify chats in a high-priority department.

> **Note:** For more information on how you can use Queue Thresholds to your advantage, contact an InstantService Account Administrator.

The following threshold times can be configured so agents receive alerts on the queue threshold properties you select. These are the initial default settings for each property, but they can be set to any number and color based on your business needs:

- **Threshold #1:** White Background—for up to one (1) minute.
- **Threshold #2:** Yellow Background—for more than one (1) minute and up to five (5) minutes.
- **Threshold #3:** Red Background—for beyond five (5) minutes.

A Color Palette link next to each threshold number—with 228 choices—provides a visual representation of colors you can use for your customization. A Preview Selection link shows you an example of how the threshold color looks in the Agent Console.

### Network Disconnect Color

From the Queue Threshold Property menu, select **Chat Queue – Time in Queue** to view the Network Disconnect Color field. The Network Disconnect color indicates a customer whose agent was disconnected from the chat session. An agent disconnect may occur when:

- The agent closes the Agent Console without dismissing the customer.
- A network connection to the service fails.
- The agent encounters problems with his or her computer.

### To set property, time, and color threshold settings:

1. Select a department from the menu.
2. Under Chat Queue Threshold Settings, from the menu, select a queue threshold property you want to customize.

3. For **Threshold #1**, select the timeframe—**minutes** or **seconds**. Type the number up to which this first threshold applies.

   For example, choosing **1 minute** means once a chat enters the agent Chat Queue, the color you choose is displayed from zero minutes to 1 minute before the color changes to reflect the next threshold.

   - In the Color box, you can type the color value—a six-digit hexadecimal value, for example, FF0000 for red—or click the **Color Palette** link or the icon.
   - From the Select a Color window, click a color box. Click to close the window. The six-digit color number appears in the Color field.
   - Click the **Preview Selection** link to review your changes. Click to close the Preview Color window.

4. For Threshold #2, select the timeframe—**minutes** or **seconds**. Type the number up to which this second threshold applies.

   For example, choosing **5 minutes** means once a chat enters the agent Chat Queue, the color you choose is displayed after 1 minute and up to 5 minutes before the color changes to reflect the next threshold.

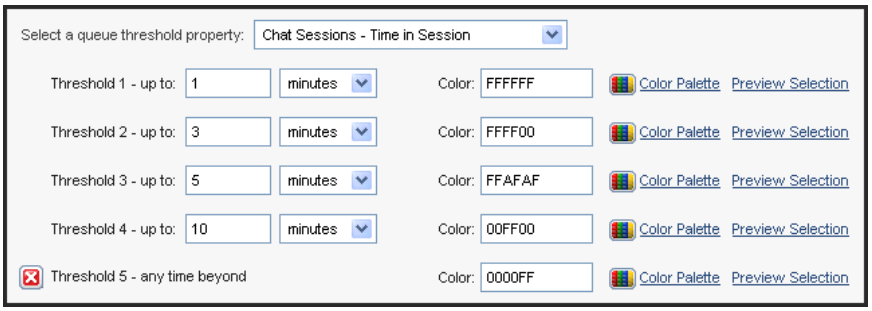
   Repeat the steps you completed for Threshold #1 to make changes to the threshold color and preview the selection.

   **Note:** Time Threshold #2 must be greater than Time Threshold #1.

5. Do **one** of the following:

   - Choose a color for **Threshold #3**.
   - If you want to use additional thresholds, click **Add**, and complete Threshold #3 and any additional thresholds you want to set up. Each subsequent threshold must be of a greater number than the previous threshold.

     The following example shows five (5) thresholds set up for this department property. Each subsequent threshold time is greater than the previous threshold time:




6. At the bottom of the window, select the check box if you want to apply the time and color thresholds to all departments.

7. Click **Save**.

## Queue Distribution Methods: Chat

InstantService offers the following methods of assigning customer chats to agents:

- **Automatic Queue Distribution** (AQD) makes assignments based on agent availability and performance.
- **Agent-Specific Distribution** assigns chats to specific agents based upon information submitted with an Advanced Customer Form. Agent-Specific Distribution is only available for chat.

Both distribution models can be available and used simultaneously.

## Queue Distribution Priority in the Agent Console: Chat

When Automatic Queue Distribution and Agent-Specific Distribution are enabled, the Agent Console displays an additional Priority column in the Chat Queue. An exclamation mark icon—green or blue—appears in the Priority column next to a chat message assigned to an agent.

- Icons are only visible to the agent to which the chat message is assigned.
- A **green icon** indicates that a chat message has been assigned via Automatic Queue Distribution.
- A **blue icon** indicates that a chat has been assigned via Agent-Specific Distribution.
- If a chat message is not assigned, no icon is present, and the chat message is visible to agents according to specific agent permissions.

**Note:** If Agent Queue Selection is configured to be Customer Waiting Longest, the next chat taken is the oldest chat with the highest priority. If no chats exist with a high priority, the oldest chat is taken.

## Automatic Queue Distribution: Chat

This method of distribution makes assignments based on agent availability and utilization and is configurable on a per-department basis. By default, Automatic Queue Distribution (AQD) is disabled.

Automatic chat distribution can be allowed by selecting the Enable check box under Automatic Queue Distribution for a specific department. When a department is enabled, chats coming into the department are automatically assigned to agents. Only agents who have the **Utililize Department Chat Queue Distribution by Enabling Automatic Queue Distribution** option marked as **Yes** on the Agents: Access: Permissions page have chats automatically assigned to them.

The Assignment Expiration setting allows you to specify the amount of time a chat should be assigned to an agent before expiring. When a chat assignment expires, the system attempts to assign the chat to a different agent.

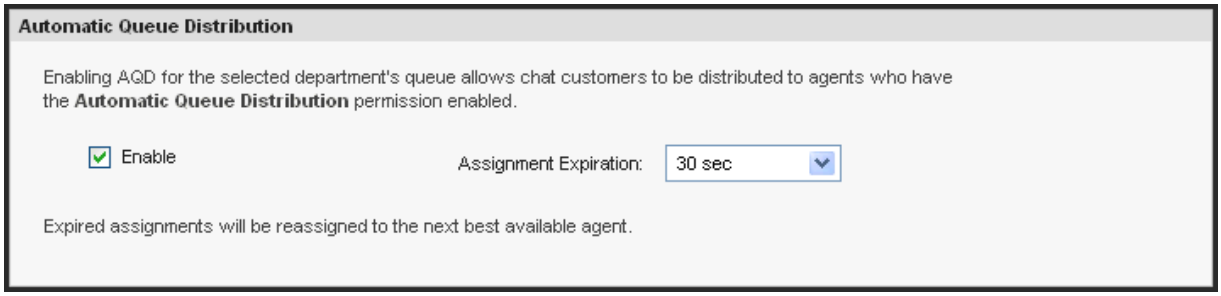
Automatic Chat Assignment rules are as follows:

- An agent is assigned one chat at a time.
- A chat is assigned to the agent who has the lowest **least busy** utilization.

  **Least busy** is measured by taking the current number of chat sessions in progress and dividing it by the maximum number of chat sessions the agent is configured to take.

  For example: an agent with two (**2**) current chat sessions and a setting of eight (**8**) maximum concurrent sessions would have a utilization of **25%** (**2** divided by **8** = **25%**).
- An agent with no chat sessions in progress always has a utilization of **0%**.
- If multiple agents have the same **least busy** utilization, the agent who has not been assigned a new chat for the longest period of time receives the next assignment.
- Re-assignments after the Assignment Expiration value is reached go to the next agent in line for an assignment. If no other agents are eligible for assignment, the chat is re-assigned back to the agent from whom the chat originally expired.
- If an agent allows a chat assignment expiration to occur, the agent is moved to the bottom of the eligibility list for new chat assignments.
- If all available agents each have a chat assigned to them, any new chat customers are left unassigned in the Chat Queue.

### To allow Automatic Queue Distribution for a department:




1. From the menu, select a department.
2. Under Automatic Queue Distribution, select the **Enable** check box.
3. From the Assignment Expiration menu, select the amount of time you want to set before the assignment expires and the system attempts to assign the chat to another agent. The choices are from **Never** to **5 minutes**.
4. Click **Save**.

## Agent-Specific Distribution: Chat

This method of distribution assigns chats to specific agents based upon information submitted with an Advanced Customer Form. An agent must have Agent-Specific Distribution permissions in order to be assigned agent-specific chats.

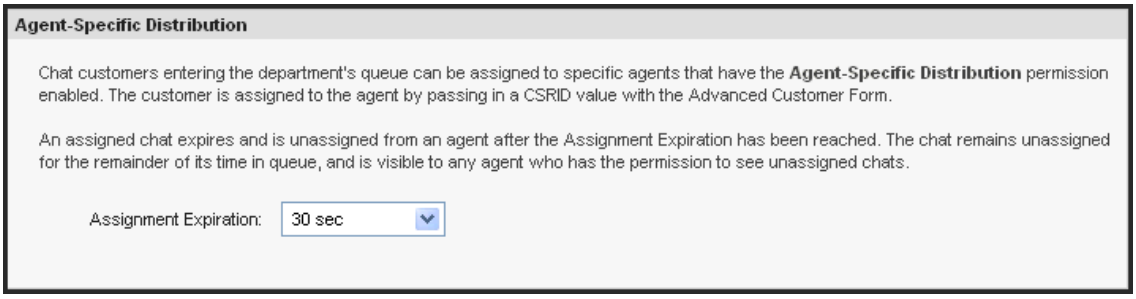
The Assignment Expiration setting allows you to specify the amount of time a chat is assigned to an agent before becoming unassigned. The chat remains unassigned for the remainder of its time in queue and is visible to any agent who has the permission to see unassigned chats.

Agent-Specific Distribution rules are as follows:

- Once a previously-assigned chat becomes unassigned due to expiration, it remains in an unassigned state for the rest of the time in the queue.
- All agents assigned to the chat for a department are able to see and handle the chat once it enters an unassigned state.
- If an agent becomes unavailable after a chat has been assigned to him or her, the chat is not unassigned until the Assignment Expiration value is reached.
- If an agent closes the Agent Console, all chats assigned to that agent immediately become unassigned.

**Note:** The Queue Distribution Method does not need to be enabled in order for Agent-Specific Distribution to function. This setting only applies to Automatic Queue Distribution.

### To allow Agent-Specific Distribution:



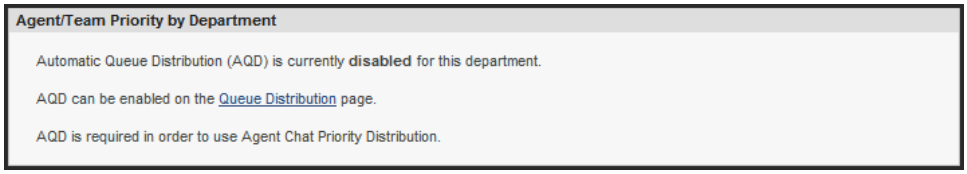

1. Under Agent-Specific Distribution, from the Assignment Expiration menu, select a expiration length ranging from **Never** to **5 minutes**.
2. Click **Save**.

## Agent Priorities

Setting Agent Priority levels allows you to route and assign chat customers to the most suitable agent based on the agent's priority level relative to other agent's priority levels within a department.

**Note:** Before setting agent priorities on this page, first determine for each department how agents or teams assigned to that department are to be prioritized. Some factors to consider include time on the job, and amount of knowledge and experience each agent has in those departments.

- Use of this feature is limited to departments whose Chat Queue has enabled Automatic Queue Distribution (AQD) on the **Departments: Chat: Queue Distribution** page. If AQD is not enabled for a department, the following message is displayed on the Agent Priorities page:



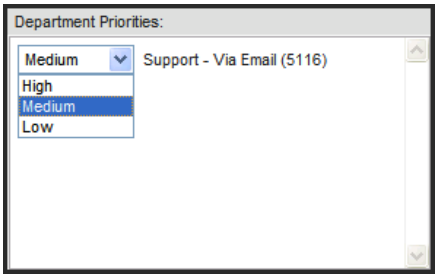

- You can choose the priority level for each agent or team assigned to the selected department.
- You can choose the priority level and manage the membership of agents or teams to the chosen priority level of the selected department.

**Note:** Priority levels cannot be set up for the Account (Default) department.

- An agent's name does not appear in the agent lists if the agent is assigned to a team.

## Agent Priority Levels

Each department should first determine how they define each priority level. Some factors you may want to consider include time on the job, and amount of knowledge and experience.




The following priority levels are available for agents:

- High
- Medium (set as the default value)
- Low

## How Agent Priorities Work

With AQD enabled for chat, chat assignment incorporates agent priority levels in determining the agent who is assigned the chat.

Before assigning a chat to an agent, the system first determines which agents have the highest priority level in the department for the chat. When an agent is a member of a team, the team's priority level for that department is used instead of the individual agent's priority level. If an agent is a member of several teams that are all assigned to that same department, the highest priority level among those teams is used.

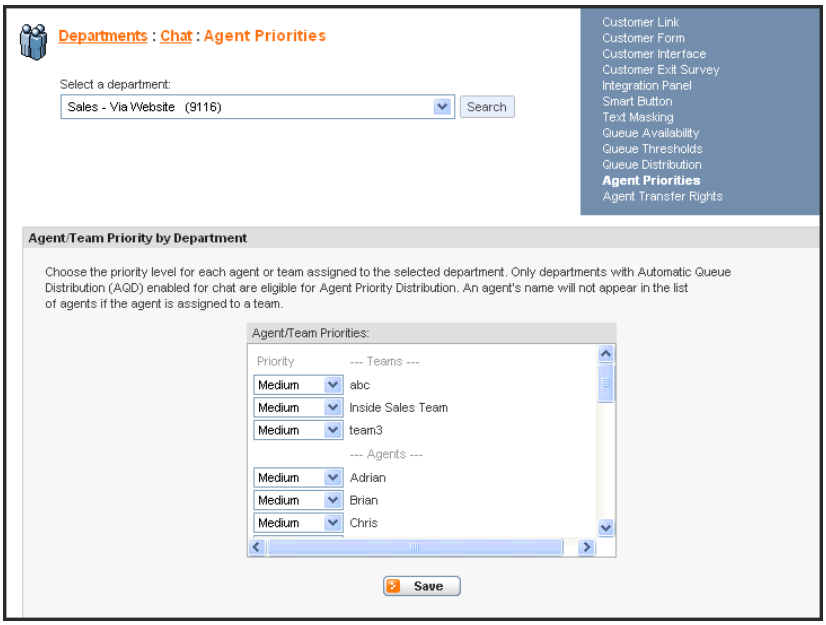
Next, the system identifies the most available agent among those agents based on their utilization (number of open sessions / maximum). If agents have the same availability, the agent who has taken a chat least recently is given priority (also known as the agent who has not taken a chat in the longest time).

If an agent lets an assignment expire, that agent goes to the bottom of the consideration list within his or her priority group. An exception is made in the case where there is only a single agent available within that priority group.

The following examples can explain how agent priorities work:

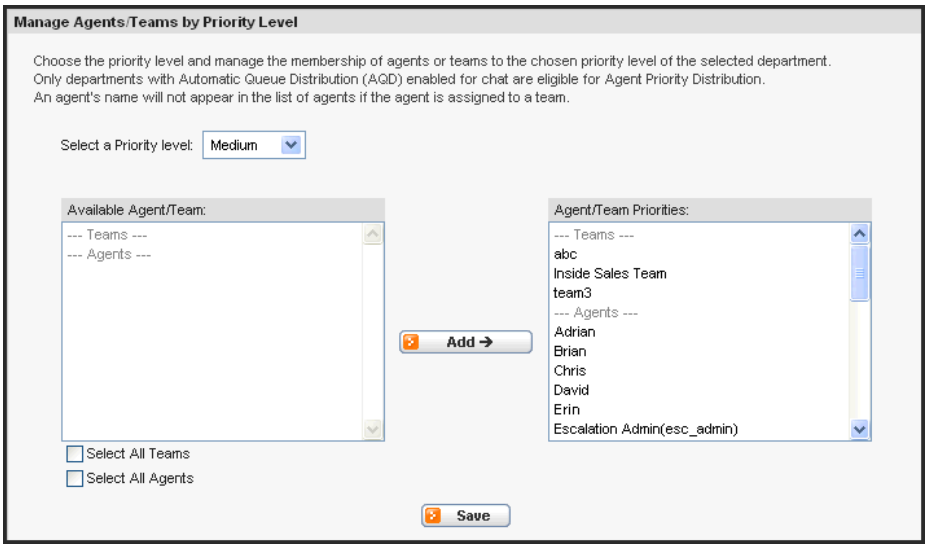
- Mary, Joe and Bill all have a priority of **High**. A chat enters the queue and all three agents are available. The chat is assigned to Mary who lets it expire. Mary cannot be considered again for assignment until the chat has first been assigned to Joe and Bill. If both of these agents also let the assignment expire, Mary is then re-assigned the chat.
- The three agents have the following assigned priorities: Mary—**High**, Joe—**Medium**, and Bill—**Low**. A chat enters the queue. and all three agents are available. The chat is first assigned to Mary who lets it expire. Since there are no other available agents with a priority of High, the chat is next assigned to Joe. Joe lets the chat expire. The chat is re-assigned to Mary, because she has a higher priority and is available.

## To set agent and team priority by department:




1. Select a department from the menu at the top of the page. Agents and teams assigned to that department appear in the Agent/Team Priorities pane.
2. In the pane, for each agent or team you want to change, select the appropriate priority level from the selection list of priorities.
3. Once you have made your selections, click **Save**.

### To manage agents and teams by priority level:



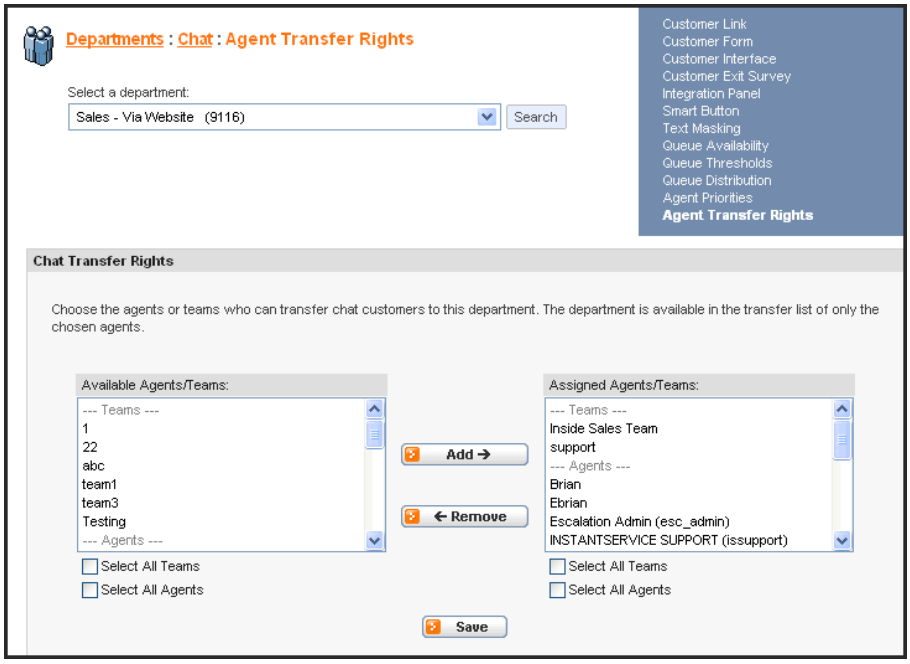

1. Select a department from the menu at the top of the page. Agents and teams assigned to that department appear in the panes.

2. From the Select a Priority Level menu, select the priority level you want to apply to the agents and teams. The default value is **Medium**.

3. Select agents and teams from the Available Agent/Team pane, and click **Add** to move them to the Agent/Team Priorities pane. Agents and teams in this pane share the priority level you set in previous step.

4. Click **Save**.

## Agent Transfer Rights



You can set department rights by which agents may transfer or forward chats to certain departments.

- In the Agent Console transfer list, agents are only able to see departments for which they have transfer rights.
- You can choose to assign all agents and teams. Teams are groups of agents using the same department assignments, chat transfer rights, and mail forwarding rights.
- Agents assigned to a team automatically receive all the rights for that team.
- If an agent is assigned to more than one team, he or she acquires the rights for each of those teams.
- Changing the rights for a team automatically changes the rights for all agents assigned to that team.

**Note:** Agents are assigned **permissions** in Account Administration to access and use various features in the Agent Console.

Agents are assigned chat transfer and mail forwarding **rights** to various departments within an account.

### To add or remove department agent transfer rights:

1. Select a department from the menu.
2. In the Available Agents/Teams panel, select one or more agents or teams, and click **Add** to assign the agent or agents the right to the current department.

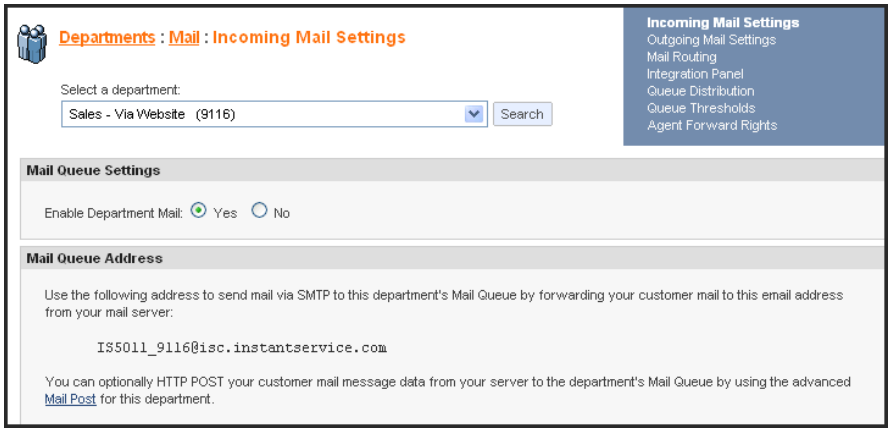
**Note:** Use the key combinations **Shift+Click** or **Ctrl+Click** to select multiple agents and teams.

3. To remove an agent transfer rights, in the Assigned Agents/Teams panel, select an agent and team, and click **Remove**.
4. Click **Save**.

# Mail


Use the Mail page to create and edit the mail properties for your departments.

## Incoming Mail Settings




Incoming mail settings apply to all messages received by the department you select from the menu. The setting titles and actions are as follows:

- **Mail Queue Settings:** Click **Yes** to allow department mail or **No** to disable it department-wide.

> **Note:** This same setting also appears on the Department: Mail: Outgoing Mail Settings page. Changes to Mail Queue Settings on this page change the settings on the other page for that department.

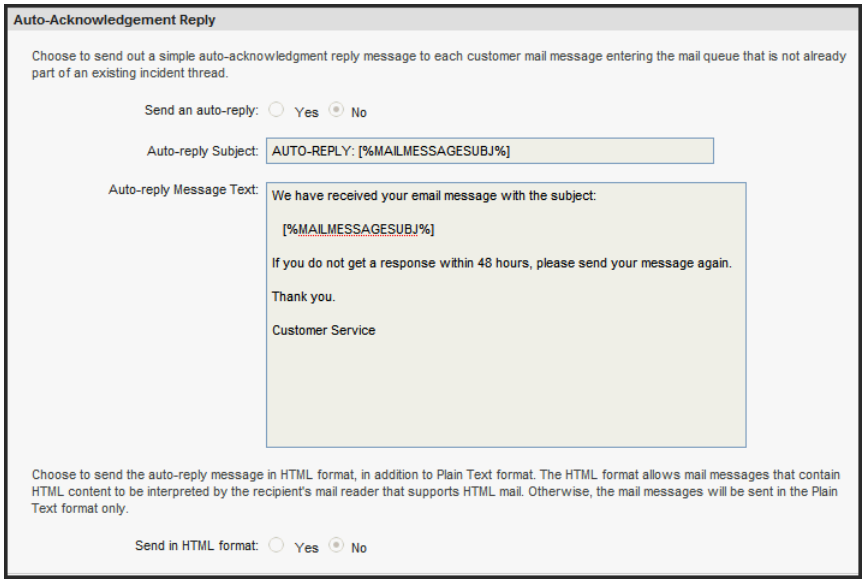
  - Disabling mail for the selected department disables the Mail Queue address for that department.

- If you disable mail for a department that has messages in the queue waiting for an answer, those messages are deleted. To avoid this problem you should:
    5. Discontinue forwarding messages to the Mail Queue address.
    6. Ensure all messages in the queue are answered before disabling the mail function.

♦ **Mail Queue Address:** The assigned address for the department.

- Use this address to send mail to the selected department Mail Queue.
- Mail is always allowed for the **Account (default)** department.
- You can forward incoming messages from your mail servers to this address (highly recommended) or have your customers send mail directly to the address themselves.
- Agents can only see messages sent to the Mail Queue address for the departments to which they are assigned.

♦ **Auto-Acknowledgement Reply:** Allows you to send an automatic acknowledgement to customers who have sent a message to the selected department.




- Click **Yes** if you want to send an auto-reply to your customers.
- A reply is only sent if the mail message is not part of an existing incident thread.

♦ **Auto-Reply Subject:** This entry appears in the subject line of your auto-reply.

- This is a required box.

♦ **Auto-Reply Message Text:** Appears as the body of the auto-reply email.

- This is a required box.
- You may use any international character in the message body, but the character encoding of the auto-reply message uses the same character encoding of the incoming customer message.

- You may choose to use the system provided tokens. These tokens are replaced with their corresponding values when the message is sent.

  For example, you can insert the token **[%MAILMESSAGESUBJ%]** in the message text. When the message is sent, **[%MAILMESSAGESUBJ%]** is replaced with the subject of the incoming message.

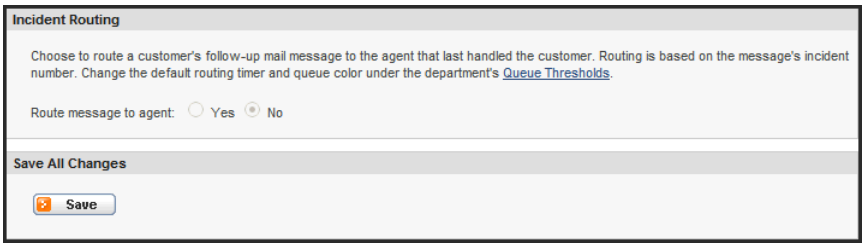
  For a complete list of available tokens, see the *Appendix 2: InstantService Tokens*.

- You can send the auto-reply message in HTML format in addition to plain text format. The HTML format allows mail messages containing HTML content to be interpreted by the customer's mail reader supporting HTML mail. Otherwise, the mail messages are sent in the plain text format only.

  For a complete list of HTML tags, see *Appendix 3: HTML Tags*.

♦ **Incident Routing:** Allows you to route a customer follow-up mail message to the agent who last handled the customer. Routing is based on the message incident number.

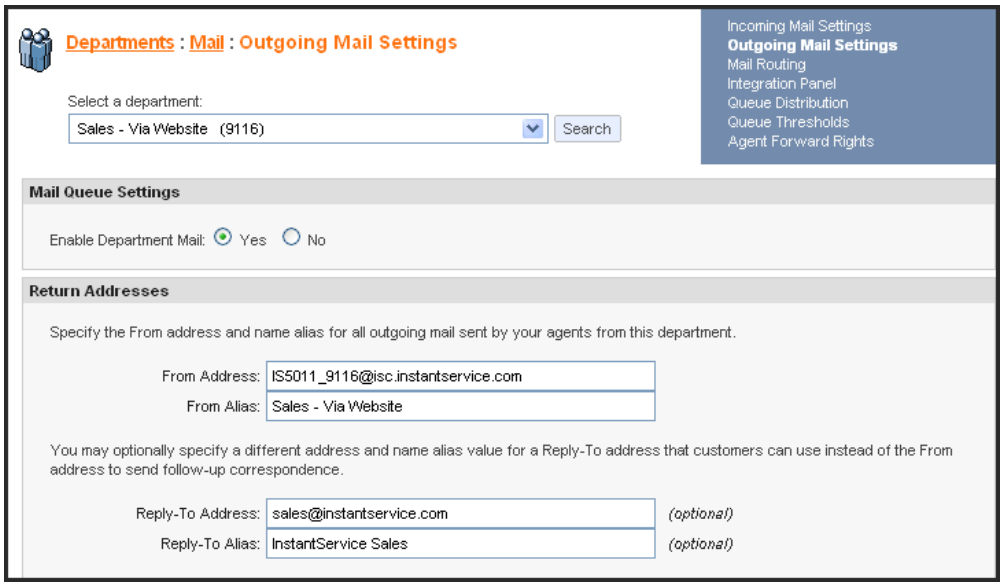
**Important:** If the Queue Distribution Method is enabled *and* Mail Incident Routing has been enabled for any of the departments to which the agent is assigned, the **Unassigned Mail Messages Hidden in Queue** permission is overridden and disabled automatically. Thus, unassigned mail messages are shown to the agent. See Automatic Queue Distribution and Permissions for more information.




- In the Agent Console Mail Queue, messages routed to an agent appear exclusively to that agent. If he or she is not available, the message is placed in the Mail Queue for all agents to see.
- To change the default routing timer and queue color, go to the department Queue Thresholds.

**Note:** Remember to click **Save** when you have completed your edits.

## Outgoing Mail Settings




Outgoing mail settings apply to all messages sent by the department you select from the menu. The setting titles and actions are defined as follows:

- **Mail Queue Settings:** Click **Yes** to allow outgoing mail or **No** to deny it department-wide.

  **Note:** This same setting also appears on the Department: Mail: Incoming Mail Settings page. Changes to Mail Queue Settings on this page change the settings on the other page for that department.

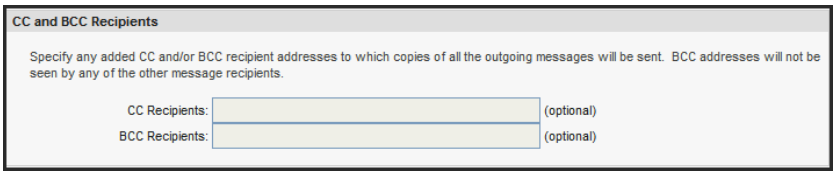
- **Return Addresses:** The mail address that appears to the customer as the From address in the inbox of their mail client after receiving an agent mail message.
  - This address defaults to the Department Mail Queue Address but can be a contact address from your website.
  - Type the return address for the customer reply unless a Reply-To address is set for the department.
  - Use the Reply-To Address and Reply-To Alias to override the From Address and From Alias as the desired mail address to which the customer would reply when receiving the agent mail message.

  **Note:** This address defaults to the From Address, but you can type a different contact address from your website.

- **Original Message:** Indicates whether a customer incoming mail message should automatically be included with the agent reply mail message in the Agent Console mail editor. Agents can edit the mail content prior to sending the reply.

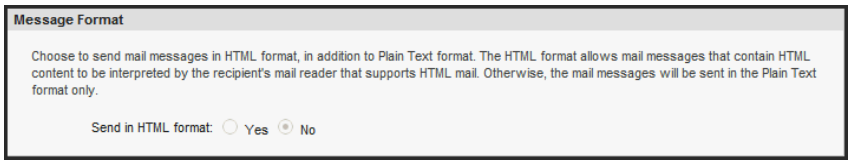

  - Click **Yes** to always include the message.
  - Click **No** to exclude the customer's original message. However, the message appears in a separate read-only window not sent with the agent's reply message.

- **CC and BCC Recipients:** Use these optional boxes to type email addresses to which copies of the agent's reply mail message are sent.




  - For example, you may want to keep copies of all outgoing mail on your own mail server for later reference or quality assurance.
  - A single semicolon must separate multiple email addresses typed into these boxes.

- **Message Format:** Use this setting to send all your agent mail messages from this department as HTML content, and plain text.




  - Click **Yes** so messages containing HTML content can be interpreted by the recipient's mail reader supporting HTML mail.
  - Click **No** so the messages are sent in plain text format only and any HTML content is not interpreted.

- **Header and Footer:** Use these optional message boxes to include additional text to all outgoing mail messages.


- Header text is added to the beginning of the message; Footer text is appended to the end of the message.
- If you have chosen to send your outgoing mail messages in the HTML format, you may include HTML content as part of your header and footer text.

  For example, put an opening `<font>` tag in the Header and closing tag `</font>` in the Footer to set the font type for both Header and Footer text.

  You can also put a logo in the Header that points at a specific logo on your website. Images must be hosted somewhere on your site for this action to work:

  ```
  <A href="http://example.com"><img src="http://example.com
  /path/yourlogo.gif"></A>
  ```

  Here is a sample Footer using HTML and InstantService tokens:

  ```
  <font face="Bookman Old Style, Book Antiqua, Garamond"
  color="#990000">
  [%CSRFIRSTNAME%] [%CSRLASTNAME%]
  Your Company Name
  </font>
  ```

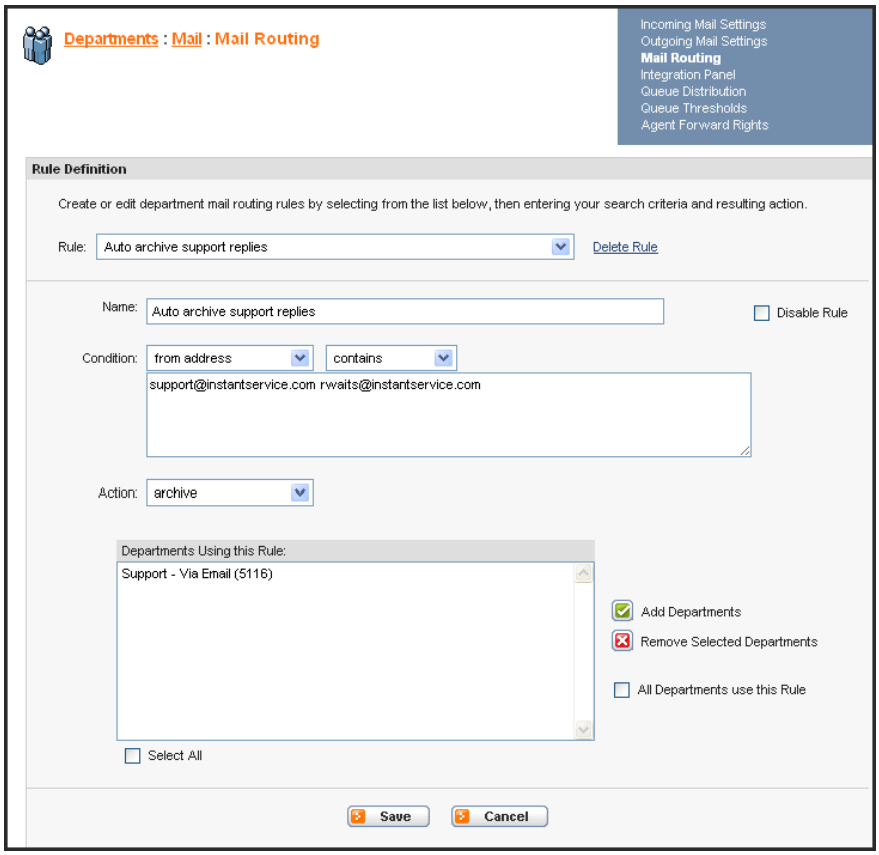
**Note:** You can create a standard signature in the Footer. Footers accept tokens from the Token list. For a complete list of available tokens, see the *Appendix 2: InstantService Tokens*.

- Click **Add Chat Link** next to the Message Header or Message Footer box to add HTML code or a plain text URL—depending on the Message Format you selected. The link allows the recipient of the email to access a chat window, and includes the following:
- Your InstantService Account ID
- The Department ID
- The Incident Number

- The recipient's email address
- Leave these boxes blank if you do not want to include a header or footer.

**Note:** Click **Save** when you have completed your edits.

## Mail Routing




Route mail messages to a department based on rules that analyze incoming mail message content. You can configure rules to perform keyword searches on the sender's mail message address, subject, body, or attachment name. Rules can use matching criteria such as **Contains** or **Exact** matches. Based upon a match, you can designate the mail message to be routed to a different department or automatically archived before it is ever presented to agents.

Use this page to do the following:

- Set up new rules.
- Edit current rules.
- Delete rules.
- Temporarily disable rules across all departments.
- Manage rules used by a specific department.
- Review rules for a specific routed department.

### To create a new mail routing rule:

1. From the Rule menu, select **<Create New Rule>**.
2. Type a name for the rule.

   **Note:** It is recommended you create a meaningful name easily understood by others.

3. Under Condition, select an item from the first menu. Choices include:
   - Subject
   - From Address
   - Body
   - Attachment Name
4. Select a qualifier from the second menu. Choices include:
   - Contains (for From Address and Attachment Name)
   - Contains Any of the Words (for Subject and Body)
   - Contains All of the Words (for Subject and Body)
   - Contains the Exact Phrase (for Subject and Body)
   - Exactly Matches (for all items)

   **Note:** A rule can be configured to search for up to 200 characters.

5. In the text box, type the specific text to serve as the trigger for the mail routing. As examples, the completed conditions could be:

   **`Subject > Contains the Exact Phrase > 15% Off Sale`**

   **`Body > Contains Any of the Words > Return Refund`**

   **`Body > Contains all of the Words > Remove Mailing List`**

   **Note:** When using the qualifiers **Contains Any of the Words** and **Contains All of the Words**, separate words in the text box using spaces rather than punctuation marks. The system considers any punctuation as part of the word.

   For example, if you type "**`sale, March, madness`**" the system looks for the following keywords (including the commas) in its search:

   - **`sale,`**
   - **`March,`**
   - **`madness`**

6. Under Action, from the first menu, do one of the following:
   - Click **Route to Department**, and select a department from the second menu. The selected department must be mail-enabled.
   - Click **Archive**. The incoming mail satisfying this rule is saved before being presented to agents. The mail message is still accessible from the Reports Portal.
   - If available, click **Purge**. When you select this action, all mail that satisfies this rule automatically bypasses the Agent Console Mail Queue and is removed from the system.

   **Note: Purge** should not be used for general spam filtering. For other available options, contact your InstantService Account Administrator.

7. To identify the departments using this rule, click **Add Departments** icon. The Add Departments window appears.

   **Note:** Only those departments that are mail-enabled appear on this list to use this rule.

8. Select one or more departments, or select the **Select All** check box to add all departments from the list.

   **Note:** Use the key combinations **Shift+Click** or **Ctrl+Click** to select multiple departments.

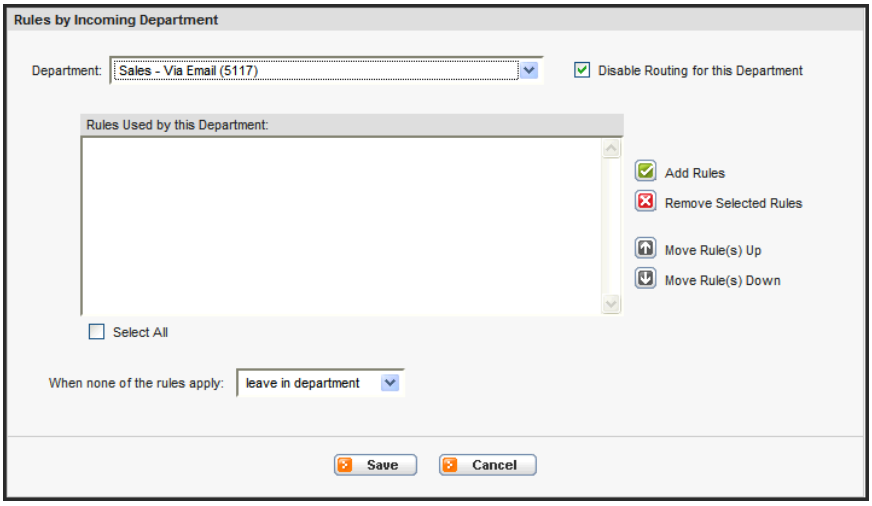
9. Click **OK**. Your department selection appears in the Departments Using this Rule panel.
10. To remove departments from the Departments panel, click the department or departments, and click the **Remove Selected Departments** icon.
11. Select the **All Departments use this Rule** check box if you want all existing departments and any departments created in the future to use this rule.
12. Click **Save**. The new rule is now available from the Rule menu at the top of the page.

### To edit a mail routing rule:

1. Under Rule Definition, from the Rule menu, click the rule you want to edit.
2. Make any changes to the selections.
3. Click **Save**.

### To manage rules used by a department to route mail:

View or edit your list of rules used by each department, displayed in the order in which they are evaluated. Control the order in which the rules are evaluated by changing the order of the rules list in this section.




1. Under Rules by Incoming Department, in the Department menu, select the department whose rules you want to manage.
2. In this section, you can:
   - Select the Disable Routing for this Department check box.

**Note:** This provides you with the choice to temporarily deactivate rules without having to delete them. To restore the rules, clear the check box.

   - Click the icon to add a rule or rules to the department.
   - Select a rule or rules in the Rules Used panel, and click the icon to remove rules from the department.
   - Click the icon to move a rule up in the list.
   - Click the icon to move a rule down in the list.

**Note:** The rules are evaluated in the order in which they are listed. Once a rule criterion is met, the evaluation process ends.

   - Select the **Select All** check box, press **`Ctrl+Click`** or **`Shift+Click`** to select multiple rules.

3. Select the action when none of the rules apply:
   - Leave in Department
   - Route to Department
   - Archive

**Note:** If you should experience difficulty in identifying the route your incoming mail is taking, run the Department Mail Activity Report and refer to the Routed Out and Routed In information.

4. Click **Save**.

### To review rules for a department receiving routed mail:


- Under Rules by Routed Department, in the Department menu, select the department whose rules you want to view. The associated rules appear in the Rules Routing to this Department panel.

**Note:** Only those departments that have rules routing to them are listed.

- You cannot change rules in the section of the page. To change rules for routed mail, see the procedures on creating and managing mail routing rules.

**Note:** Mail messages routed to a department that itself is using routing rules are not routed a second time.

## Mail Routing and Auto-Acknowledge Replies

If you have selected to send an auto-acknowledgement reply from a department, the reply is only sent as a result of receiving a mail message directly from the customer. A mail message routed to a department does not result in an auto-reply.

**Note:** Auto-replies are only sent to customers who are not already part of an existing incident thread. Auto-acknowledgement replies are set up on the Departments: Mail: Incoming Mail Settings page.

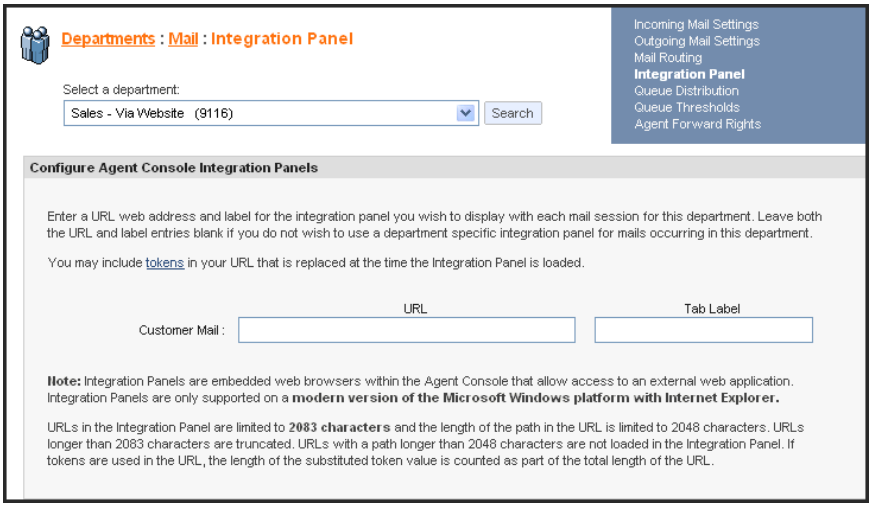
## Mail Integration Panel

You can specify an integration panel URL for each department. The integration panel is displayed in the Agent Console during a mail session.

You may include tokens in your URL. The token is replaced at the time the integration panel is loaded.

The character limit for the URL field is **1000** characters. The character limit for the Tab Label field is **32** characters.

If tokens are used in the URL, the length of the substituted token value is counted as part of the total length of the URL.




### To specify a department-specific integration panel for mail:

1. At the top of the page, use the menu to select a department.
2. In the fields, type a URL web address and tab label for the integration panel you want displayed.
3. Leave both the URL and Tab Label fields blank if you do not want to use a department-specific integration panel for mail for the selected department.
4. Click **Save**.

**Note:** Integration panels are embedded web browsers within the Agent Console that allow access to an external web application. Integration panels are only supported on a **modern version of the Microsoft Windows platform with Internet Explorer**.

## Queue Distribution Methods: Mail


InstantService offers the following method of assigning customer mail messages to agents.

- **Automatic Queue Distribution** (AQD) makes assignments based on agent availability and utilization.

> **Note: Agent-Specific Distribution** is only available for chat. For more information, see Agent-Specific Distribution: Chat.

Chat and mail distribution models can be used simultaneously.

## Queue Distribution Priority in the Agent Console: Mail

When Automatic Queue Distribution is available, the Agent Console displays an additional Priority column in the Mail Queue. A green exclamation mark icon appears in the Priority column next to a mail message assigned to an agent.

- Icons are only visible to the agent to which the mail message is assigned.
- A **green icon** indicates that a mail message has been assigned via Automatic Queue Distribution. These mail messages are always displayed first, even if the list is sorted.
- If a mail message is not assigned, no icon is present and the mail message is visible to agents according to specific agent permissions.

## Automatic Queue Distribution: Mail

This method of distribution makes assignments based on agent availability, and utilization, and is configurable on a per-department basis. By default, Automatic Queue Distribution is disabled.

Automatic mail queue distribution can be allowed by selecting the Enable check box for a specific department. When a department is enabled, mail messages coming into the department are automatically assigned to agents. Only agents who have Automatic Customer Mail Assignment permissions set on the Agent Permissions page can view these messages.

The Assignment Expiration setting allows you to specify the amount of time a mail message should be assigned to an agent before expiring. When a mail message assignment expires, the system attempts to assign the mail message to a different agent.

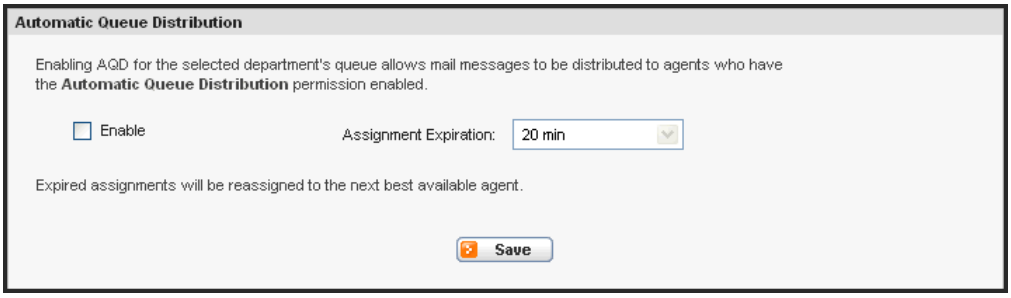
Automatic Mail Message rules are as follows:

- An agent is assigned one mail message at a time.
- A mail message is assigned to the agent who has the lowest **least busy** utilization.

  **Least busy** is measured by taking the current number of mail messages in progress and dividing it by the maximum number of mail messages the agent is configured to take.

  For example: an agent with two (**2**) mail messages in progress and a setting of eight (**8**) maximum concurrent sessions would have a utilization of **25%** (**2** divided by **8** = **25%**).
- An agent with no mail messages in progress always has a utilization of **0%**.
- If multiple agents have the same **least busy** utilization, the agent who has not been assigned a mail message for the longest period of time receives the next assignment.
- Re-assignment after the assignment timeout is reached goes to the next agent in line for an assignment. If no other agents are eligible for assignment, the mail message is re-assigned back to the agent from whom the mail message originally expired.
- If an agent allows a mail message assignment timeout to occur, the agent is moved to the bottom of the eligibility list for new mail message assignments.
- If all available agents each have a mail message assigned to them, any new mail messages are left unassigned in the Mail Queue.

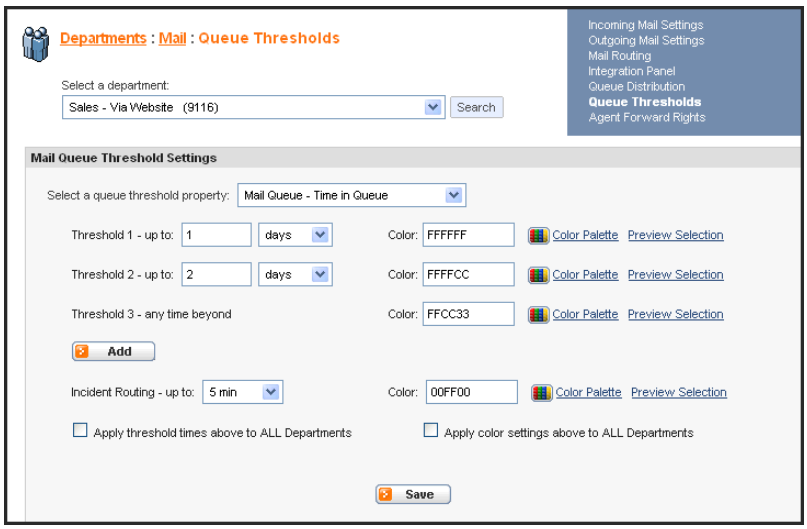
### To allow Automatic Mail Queue Distribution:




1. From the menu, select the department.
2. Select the **Enable** check box.
3. In the Assignment Expiration menu, select an expiration length ranging from **Never** to **5 minutes**.
4. Click **Save**.

**Important:** If the Queue Distribution Method is enabled *and* Mail Incident Routing has been enabled for any of the departments to which the agent is assigned (see Incoming Mail Settings), the **Unassigned Mail Messages Hidden in Queue** permission is overridden and disabled automatically. Thus, unassigned mail messages are shown to the agent. See Permissions for more information.

## Mail Queue Thresholds




When a customer sends a mail message, it is represented visually in the Agent Console as an entry in the Mail Queue. You can set service level thresholds that are visually represented by a color change, which indicates when a waiting mail message passes the predetermined threshold. These color changes alert agents and supervisors to missed service levels.

You can select any or all of the following queue threshold properties to configure:

- **Mail Queue – Time in Queue**
- **Mail Sessions – Time in Session**
- **Mail Follow-up – Last Response Time**
- **Mail Removed – Removed Time**

You can specify threshold colors and times per department per queue threshold property—for example, **Sales** and **Time in Session**—or you can set a threshold property or properties for all departments to identify mail in a high-priority department.

**Note:** For more information on how you can use Queue Thresholds to your advantage, contact an InstantService Account Administrator.

The following threshold times can be configured so agents receive alerts on the queue threshold properties you select. These are the initial default settings for each property, but they can be set to any number and color based on your business needs:

- **Threshold #1:** White Background—for up to one (1) day.
- **Threshold #2:** Yellow Background—for more than one (1) day and up to two (2) days.

- **Threshold #3:** Red Background—for beyond two (2) days.
- **Incident Routing: Green Background—**Identifies customer reply mail messages visible only to the agent who last handled the customer. The threshold color is visible to the agent as long as he or she is logged in and available at the time the message is received. Otherwise, the message is available to all agents. Routing is based on the message incident number.

A Color Palette link next to each threshold number—with 228 choices—provides a visual representation of colors you can use for your customization. A Preview Selection link shows you an example of how the threshold color looks in the Agent Console.

### To set property, time, and color threshold settings:

1. Select a department from the menu.
2. Under Mail Queue Threshold Settings, from the menu, select a queue threshold property you want to customize.
3. For **Threshold #1**, select the timeframe—**minutes**, **hours**, or **days**. Type the number up to which this first threshold applies.

   For example, choosing **1 day** means once a chat enters the agent Mail Queue, the color you choose is displayed from zero minutes to 1 day (24 hours) before the color changes to reflect the next threshold.

   - In the Color box, you can type the color value—a six-digit hexadecimal value, for example, FF0000 for red—or click the **Color Palette** link or the icon.
   - From the Select a Color window, click a color box. Click to close the window. The six-digit color number appears in the Color field.
   - Click the **Preview Selection** link to review your changes. Click to close the Preview Color window.
4. For Threshold #2, select the timeframe— **minutes**, **hours**, or **days**. Type the number up to which this second threshold applies.

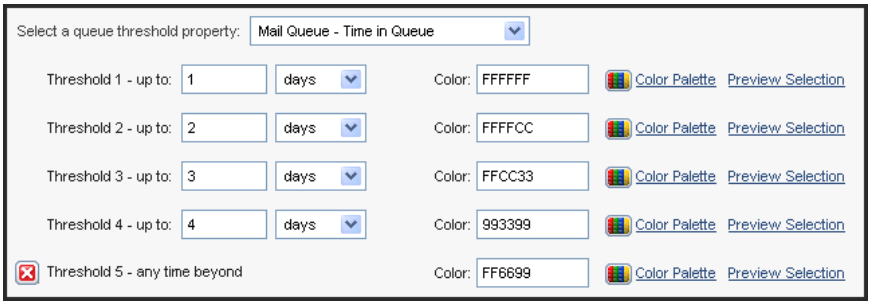
   For example, choosing **2 days** means once a mail enters the agent Mail Queue, the color you choose is displayed after 1 day and up to 2 days before the color changes to reflect the next threshold.

   Repeat the steps you completed for Threshold #1 to make changes to the threshold color and preview the selection.

   **Note:** Time Threshold #2 must be greater than Time Threshold #1.

5. Do **one** of the following:
   - Choose a color for **Threshold #3**.
   - If you want to use additional thresholds, click **Add**, and complete Threshold #3 and any additional thresholds you want to set up. Each subsequent threshold must be of a greater number than the previous threshold.

The following example shows five (5) thresholds set up for this department property. Each subsequent threshold time is greater than the previous threshold time:

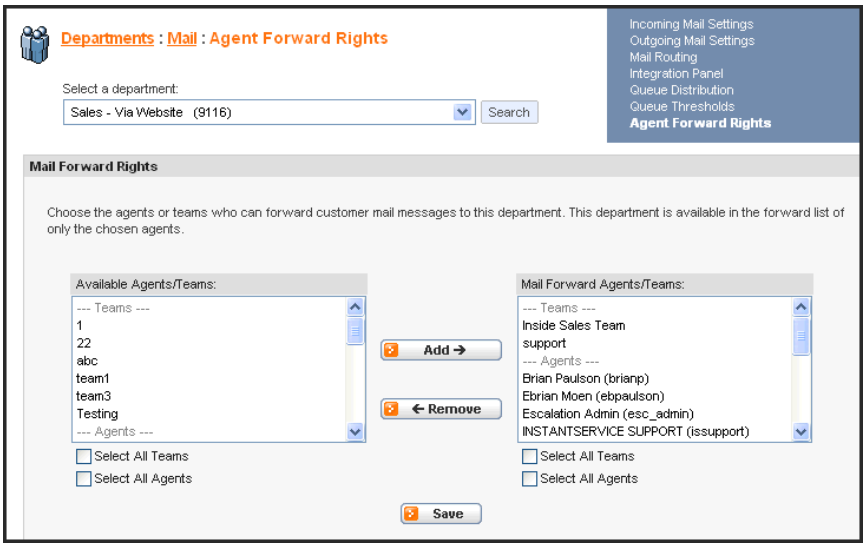



6. If incident routing has been enabled for this department, you can set the time—from **5 minutes** to **1 week**—and the color to identify a customer follow-up mail message to the agent who last handled the customer.

**Note:** The threshold color is visible to the agent as long as he or she is logged in and available at the time the message is received. Otherwise, the message is available to all agents.

7. At the bottom of the window, select the check box if you want to apply the time and color thresholds to all departments.
8. Click **Save**.

## Agent Forward Rights




You can set rights by which agents may forward mail messages to certain departments. On their Agent Console Forward list, Agents are able to see the departments for which they have forward rights.

- You may choose to add all agents and teams. Teams are groups of agents that all use the same department assignments, chat transfer rights, and mail forwarding rights.

- Agents assigned to a team automatically receive all the rights for that team.
- If an agent is assigned to more than one team, he or she acquires the rights for each of those teams. Changing the rights for a team automatically changes the rights for all agents assigned to that team.

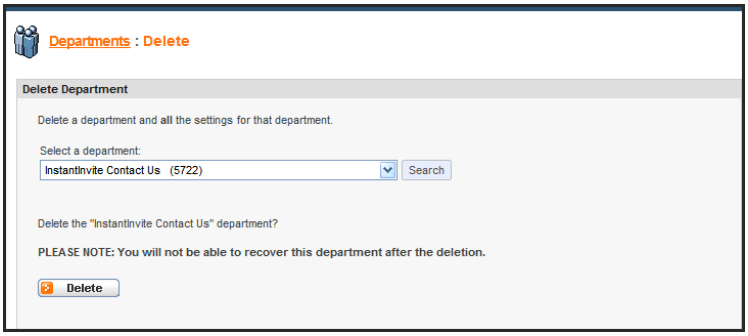
### To add or remove agent mail forward rights:

1. Select a department from the menu.
2. To add agent rights, in the Available Agents/Teams panel, select one or more agents or teams, and click **Add**. The agent/team now has rights to forward mail messages to the selected department.

   **Note:** Use the key combinations **Shift+Click** or **Ctrl+Click** to select multiple agents and teams. You can also select the **All Teams** and **All Agents** check boxes under each of the panes.

3. To remove agent rights, in the Assigned Agents/Teams panel, select one or more agents or teams, and click **Remove**. The agent/team no longer has rights to forward mail messages to the selected department.
4. Click **Save**.

## Delete




Deleting a department removes it permanently from the system. Once deleted, chat requests and mail messages are no longer accepted for the department.

**Important:** Make sure you remove all department chat and mail access points from your website before deleting a department. Despite deletion, the department is available for reporting purposes.

### To delete a department:

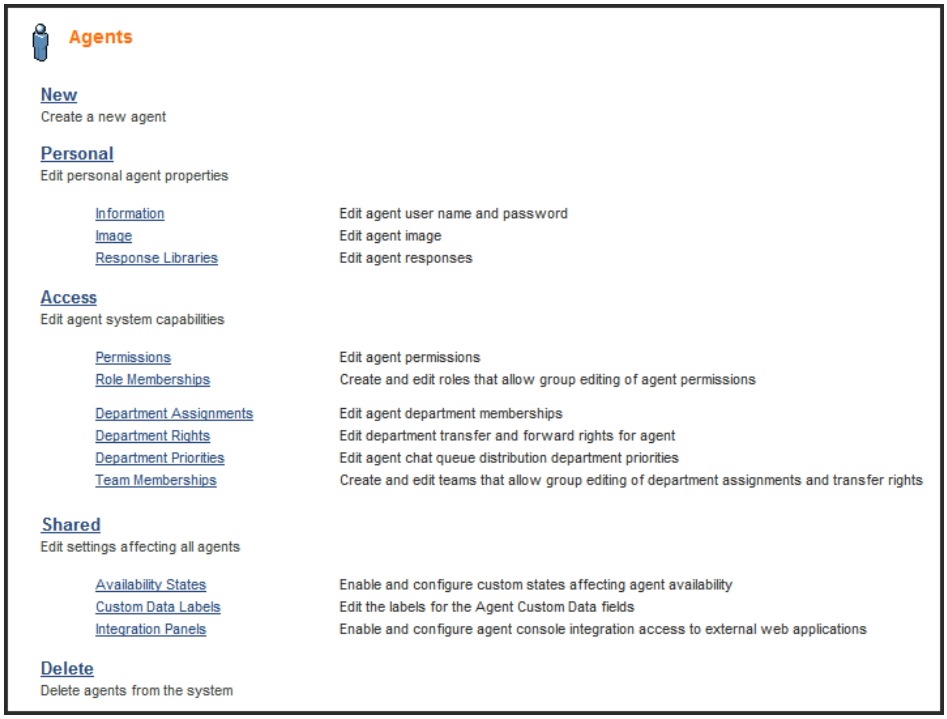
1. Select a department from the menu, and click **Delete**.
2. Click **OK** to complete the deletion.

**Important:** You cannot recover this department after the deletion.

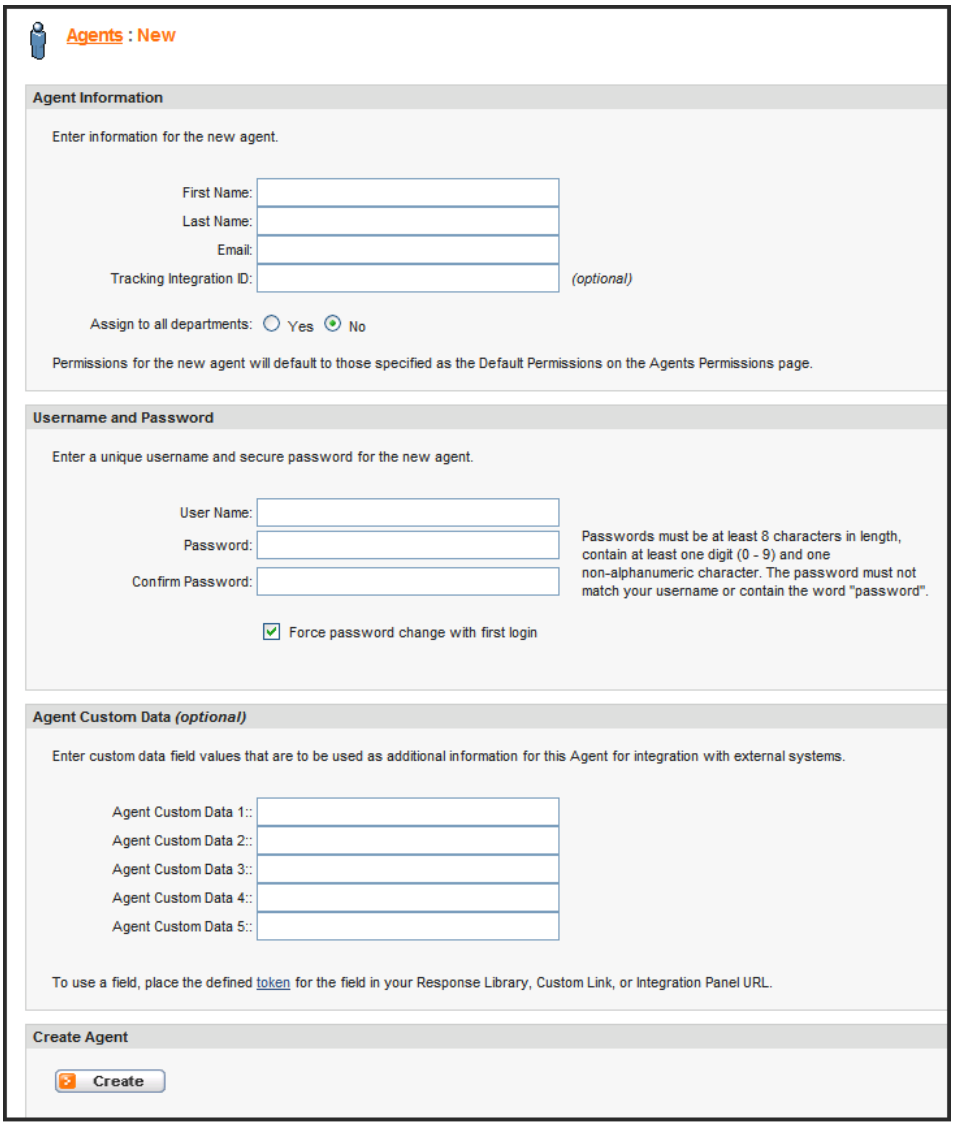
# Chapter 5: Agents

The Agents Portal is where you:

- Create new agents and delete current agents.
- Edit agent properties, such as user name and password, agent image, and agent responses.
- Edit agent system capabilities, such as permissions, role and team memberships, and department assignments and rights.
- Edit settings affecting all agents, such as availability, custom data labels, and integration panels.



# New




The New page is where you create new agents for your account.

### To create a new agent:

1. Type all of the required personal information for the new agent.

   **Note:** The Tracking Integration ID box is optional and used to connect the agent defined in Account Administration to an agent configured in an external, third-party system. The value in this box is available as a token used to associate the agent with events occurring in the customer client. For more information about Customer Client Event Tracking, contact InstantService support.

2. Click **Yes** to assign the agent to all departments. Permissions for the new agent default to those specified as the Default Permissions on the Agents: Access: Permissions page.

3. Type a user name and password.

**Note:** User names can be up to 100 characters in length. Passwords must be at least eight characters long, contain one digit (0-9), and one non-alphanumeric character.

4. To require the agent to change his or her password at the first login, select the check box under the Confirm Password box.
5. Type any custom data field values used as additional agent information for integration with external systems. This activity is *optional*.

**Note:** For more information, see the Agent Custom Data section.

6. Click **Create**.

### Agent Custom Data

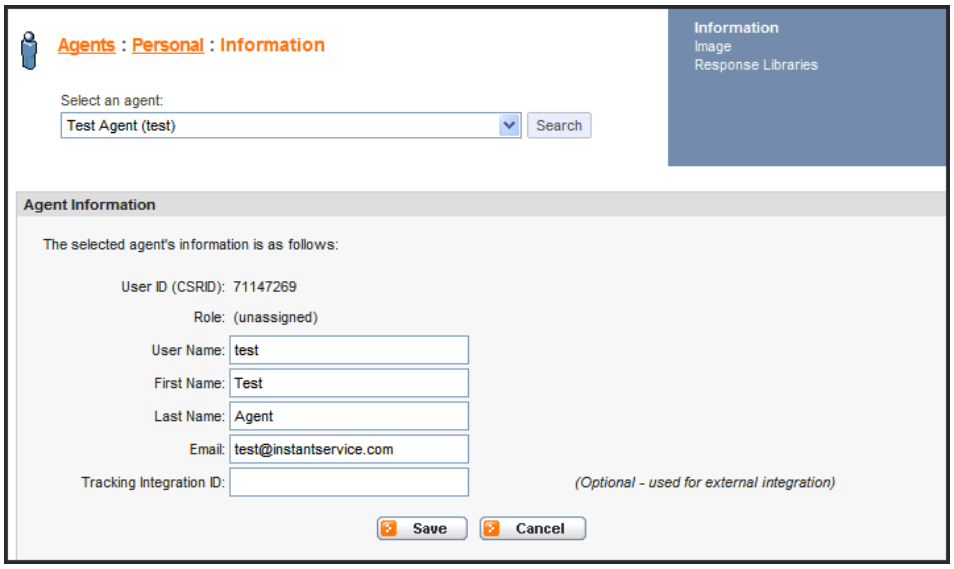
Agent Custom Data is optional and is used to send agent information to external applications via the various integration panels in the Agent Console, response library items or custom links.

- Click the **Token** link to review token choices.
- To use a box, copy and paste or type the token name in the box in the location where you want the value to be.

## Personal

Use the Personal section to edit the user name and password, image, and response libraries associated with a specific agent.

## Information

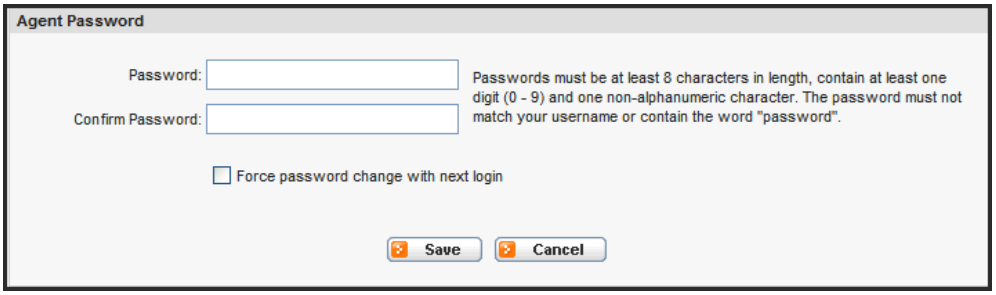



- To update individual agent information, select an agent from the menu, make all changes, and click the **Save** button in this section.

### Tracking Integration ID

Use the optional Tracking Integration ID box to associate the agent to an external, third-party tracking system. For more information about using this box, contact InstantService support.

### To change an agent password:



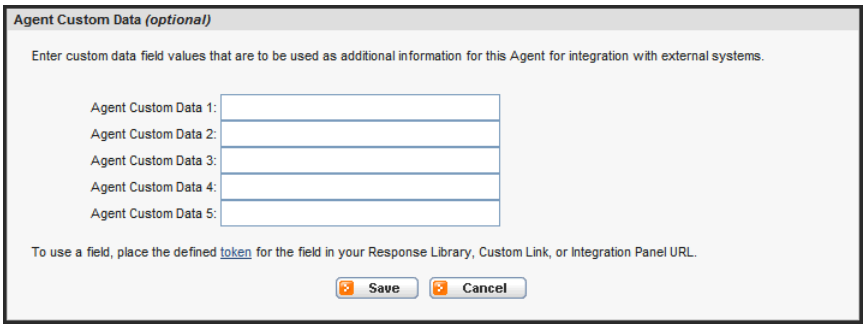

1. Select an agent from the menu.
2. Under Agent Information, ensure that the agent user name is correct.
3. Type a password for the agent and re-type to confirm it.
   - The requirements for **passwords** include the following:
     - Must be at least eight characters long.
     - Contain one digit (0-9) and one non-alphanumeric character.
     - Not match the agent user name.
     - Not contain the word **`password`**.

- Not include the last four (4) passwords used.
- Beginning 14 days before the configured password expiration, an agent receives an option to change the password each time he or she logs into the InstantService application. If the agent does not change the password within 14 days, he or she is no longer able to log into the InstantService application the password is changed.

4. To require the agent to change his or her password at next login, select the **Force Password** check box.
5. To override password expiration, if available, select the **Never Expire Password for this Agent** checkbox.
   - For security purposes, it is not recommended that you use this feature unless absolutely necessary.
   - Security best practices recommend your agents change passwords every 30 days.
   - The agent must still change his or her password if you selected the **Force Password Change with Next Login** check box.
6. Click **Save**.

**Important:** If an agent enters the incorrect password four (4) times, an invalid logon error appears, and the **agent is locked out of the system for 30 minutes**. To alleviate this situation, you can create a new password for the agent on the Agents: Personal: Information page.

## Agent Custom Data

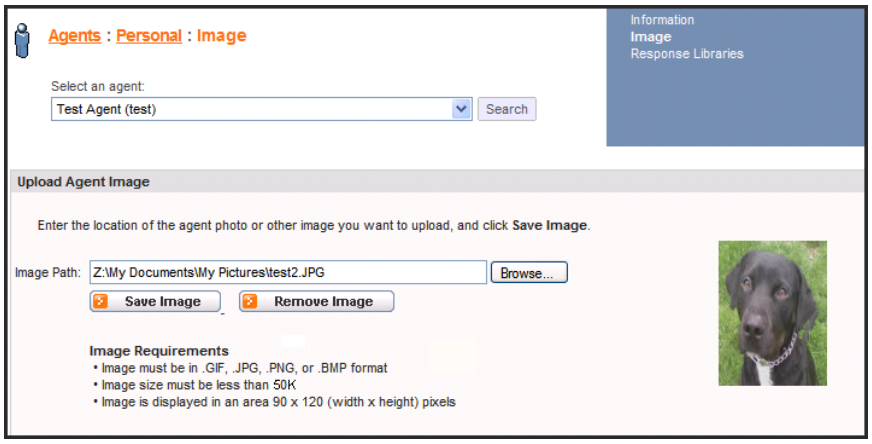



Agent Custom Data is optional and is used to send agent information to external applications via the various integration panels in the Agent Console, response library items or custom links.

- Click the **Token** link to review token choices.
- To use a box, copy and paste or type the token name in the box in the location where you want the value to be.
- Click **Save**.

## Image

You may display an image to your customers when they are in a chat session with an agent. This image is displayed in the Customer Chat Client.




InstantService has the following image requirements:

- `.GIF` , `.PNG`, `.BMP`, `.JPG` format
- Size must be less than 50K
- Display area: 90 x 120 pixels

### To add or remove an agent image:

1. Select an agent from the menu.
2. Do **one** of the following:
   - To add an image, type the image path or click **Browse** to locate the image, and click **Save Image**.
   - To remove an existing image, click **Remove Image**.

**Note:** For more information about using the agent image in the Customer Client layout, see Departments: Chat: Customer Interface.

## Response Libraries

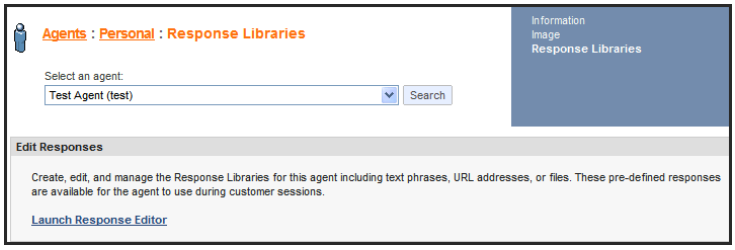
You can create a response library tailored to a specific agent using the Response Editor. Just as you would with the Department response libraries, select the agent you want to provide with a response library and click the **Launch Response Editor** link.

In addition, HTML tags are available for use in the response libraries. For more information, see *Appendix 3: HTML Tags*.

> **Important:** As a best practice, **`<img>`** (image) tag links used in response libraries should use **`HTTPS`** (secure HTTP) instead of **`HTTP`**. This is to prevent warning dialogs from appearing to the customer during a chat session.

The response library you create for the agent appears in the upper left quadrant of the Agent Console on the Text tab.

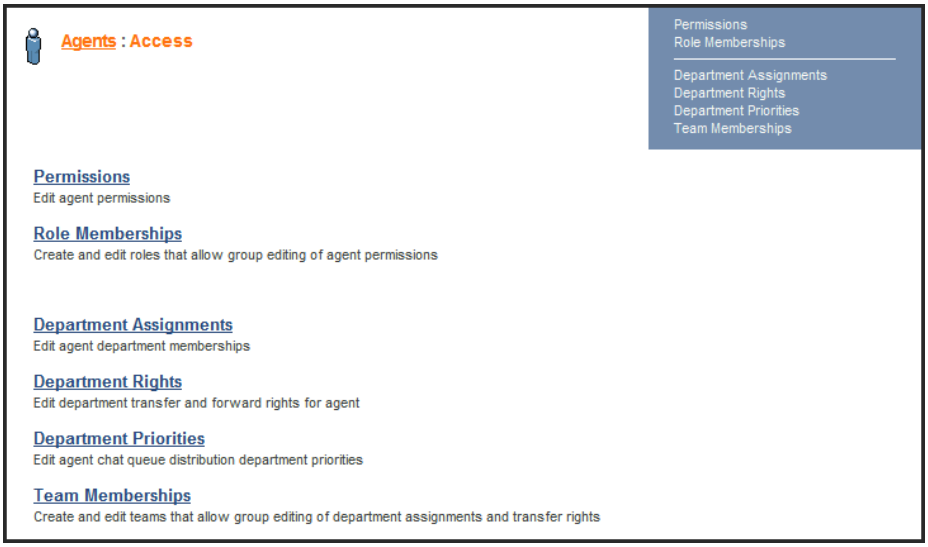
For more information on creating and editing responses, see the Department Response Libraries section.



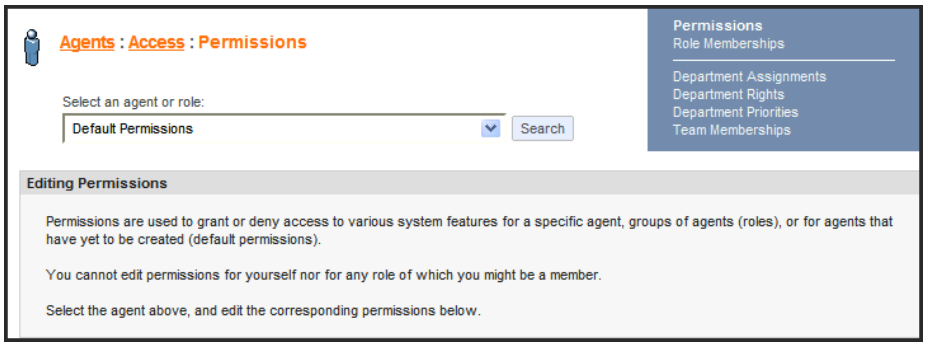

> **Important:** Unlike Department response libraries, Agent response libraries do not have optional key combination *hotkey* capabilities.

# Access

Use the Access section to edit your agent system capabilities, including permissions, role and team memberships, and department assignments, rights, and priorities.



## Permissions




Use this page to edit permissions for the default permissions, roles, or individual agents.

### Default Permissions

These permissions are automatically applied to new agents when their accounts are created. Changes made to the default settings do not affect the permissions of existing agents. Once you create their accounts, you can change the settings of individual agents.

The permission settings should be reviewed, so you can select those permissions that effectively meet your business requirements.

### To set default permissions:

- Select **Default Permissions** from the Agent/Role menu, and edit the permissions as needed.

**Note:** Remember to click **Save** when you have completed your edits.

### Roles

A role is a set of permissions to which one or more agents can be assigned. From a management perspective, permissions for a large group of agents are much easier to control. By changing the permissions of a role, you change the permissions for all associated agents.

If you do not assign agents to a role, you must change their permissions settings individually.

### Individual Agents

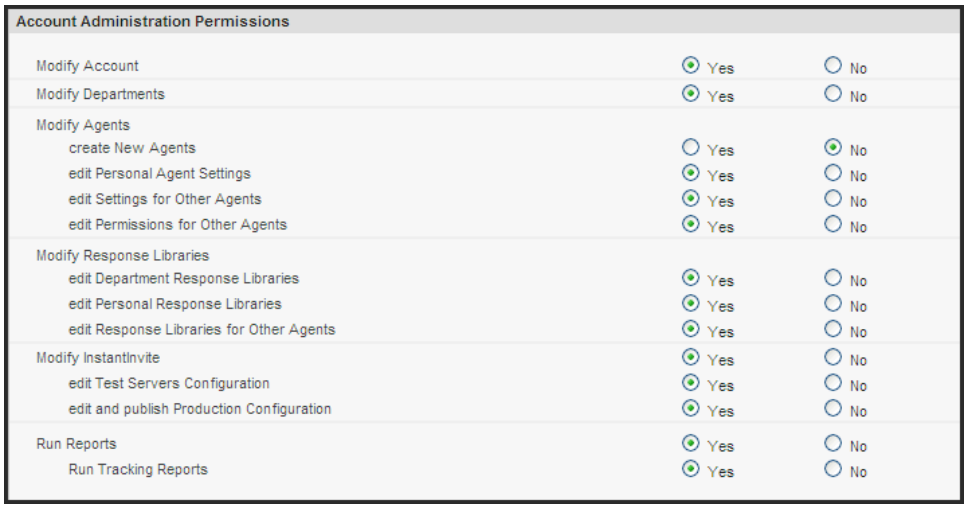
This set of permissions applies only to the agent being edited. If an agent is subsequently assigned to a role, his or her permissions are modified to match those of the selected role.

### To assign permissions to an agent or a role:

- Select an agent or role from the Agent/Role menu, and edit the permissions as needed.

**Note:** Remember to click **Save** when you have completed your edits.

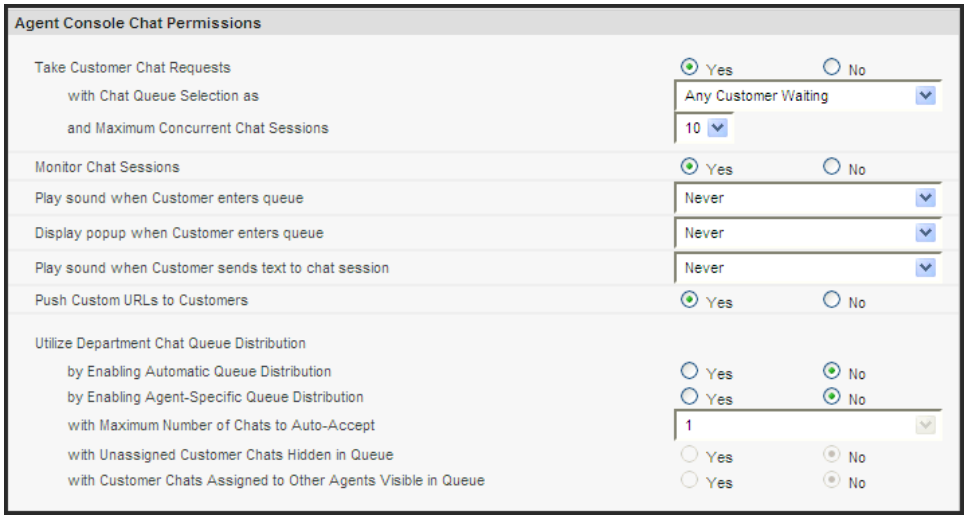
The following table defines the permissions related to **Account Administration**:




| Permission Title | Definition |
|---|---|
| **Modify Account** | Allows the agent to access the Account Portal and make changes to the Account (default) settings.<br><br>**Note:** Administrators can still modify the Account (Default) department even when they do not have Modify Department permissions as long as they have Modify Account permissions enabled. |
| **Modify Departments** | Allows the agent to access and change department settings and create new departments. |
| **Modify Agents** | |
| **…create New Agents** | Allows the agent to create agents. |
| **…edit Personal Agent Settings** | Allows the agent to edit their own account settings. |
| **…edit Settings for Other Agents** | Allows the agent to edit the settings of other agents. |
| **…edit Permissions for Other Agents** | Allows the agent to edit permissions of other agents. Agents are not allowed to edit their own permissions; this is to prevent them from accidentally locking themselves out of the account. |
| **Modify Response Libraries** | |
| **…edit Department Response Libraries** | Allows the agent to edit department response libraries. |
| **…edit Personal Response Libraries** | Allows the agent to edit their own response libraries. |
| **…edit Response Libraries for Other Agents** | Allows the agent to edit other agent response libraries. |
| **Modify InstantInvite** | Allows the agent to edit the account InstantInvite settings. |
| **…edit Test Servers Configuration** | Allows the agent to edit the test server configuration. |

| Permission Title | Definition |
|---|---|
| **…edit and Publish Production Configuration)** | Allows the agent to edit the InstantInvite settings and publish to the production server. |
| **Run Reports** | Allows the agent to run reports. |

The following table defines permissions related to the **Agent Console for chat**:

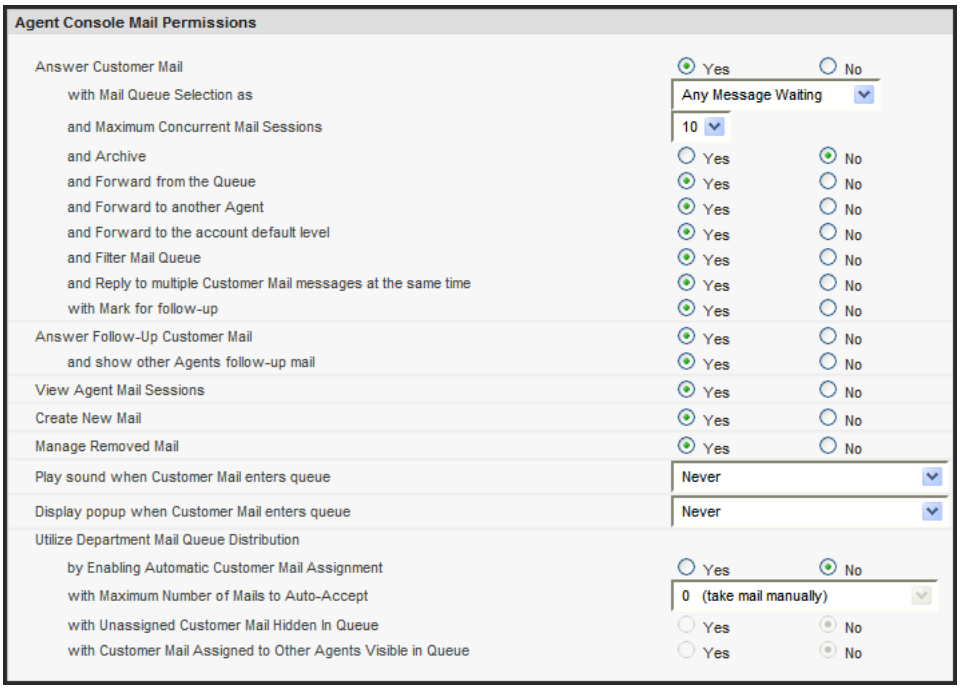



| Permission Title | Definition |
|---|---|
| **Take Customer Chat Requests** | Allows the agent to take customer chats. |
| **…with Chat Queue Selection As** | Defines whether the agents can choose the chats themselves from the queue or take the customer who has been waiting the longest.<br>Choices include:<br>♦ **Any Customer Waiting**<br>♦ **Customer Waiting Longest** |
| **…and Maximum Concurrent Chat Sessions** | Defines the maximum number of chat customers the agent may handle concurrently. If AQD is enabled, the agent does not receive any more assigned chat sessions.<br>Choices are **1** through **10**.<br>**Note:** Agents can have up to ten (10) mail and ten (10) chat sessions concurrently, for a total of 20. However, 3 – 5 sessions for each are recommended as optimal. Set the concurrent mail session number under **Permissions for Agent Console for Mail**. |
| **Monitor Chat Sessions** | Allows an agent supervisor to monitor other agent chat sessions. Once given this permission, the supervisor can also join the chat being monitored. |

| Permission Title | Definition |
|---|---|
| **Play Sound When Customer Enters Queue** | Allows the administrator to determine the conditions for playing a notification sound when a customer enters the queue. If the Agent Availability is set to **Unavailable**, no sound plays regardless of the setting. You can set the notification sound to play for any of the following conditions:<br>♦ **Never**<br>♦ **If Customer Enters Empty Queue**<br>♦ **If Agent Has No Sessions Open**<br>♦ **Always** |
| **Display Pop-Up When Customer Enters Queue** | Allows the administrator to determine the conditions for showing a notification window when a customer enters the queue. If the Agent Availability is set to **Unavailable**, no notification window is displayed regardless of the setting. You can set the notification window to display for any of the following conditions:<br>♦ **Never**<br>♦ **If Customer Enters Empty Queue**<br>♦ **If Agent Has No Sessions Open**<br>♦ **Always** |
| **Play Sound When Customer Sends Text to Chat Session** | Allows the administrator to determine the conditions for playing a notification sound when a customer sends text to the chat session. You can set the notification sound to play for any of the following conditions:<br>♦ **Never**<br>♦ **If Customer Session Not in Focus**<br>♦ **Always** |
| **Push Custom URLs to Customers** | Allows the agent to type a URL not listed in the Response Library into the browser address bar and send it to the customer. By not allowing this permission, you restrict the ability to type in unsanctioned URLs. |
| **Utilize Department Chat Queue Distribution** | |
| **…by Enabling Automatic Queue Distribution** | Allows the agent to receive assigned chats from departments with the Automatic Queue Distribution Method set to **Enabled**. |
| **…by Enabling Agent-Specific Queue Distribution** | Allows customer chats to be distributed on an agent specific basis. Chats are assigned to the CSRID in the Advanced Customer Form. |
| **…with Maximum Number of Chats to Auto-Accept** | Sets the maximum number of chat sessions that automatically open in the Agent Console for this agent.<br>Choices are:<br>♦ **0:** Agent takes chats manually<br>♦ **1 – 10**: Agent auto-accepts chats |

| Permission Title | Definition |
|---|---|
| **…with Unassigned Customer Chats Hidden in Queue** | Chats in the department queue that are unassigned are not visible to the agents. |
| **…with Chat Customers Assigned to Other Agents Visible in Queue** | Allows the agent to view chats in the queue assigned to other agents. |

The following table defines permissions related to the **Agent Console for mail**:

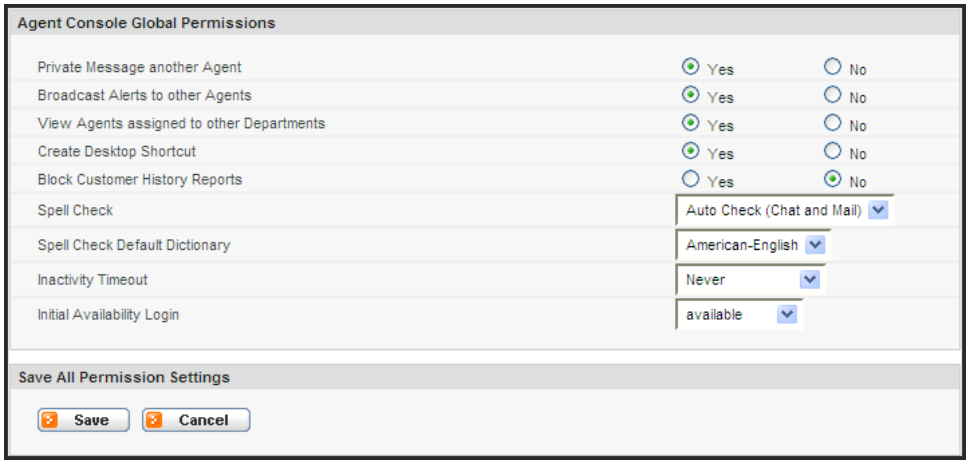



| Permission Title | Definition |
|---|---|
| **Answer Customer Mail** | Allows the agent to take mail messages out of the queue and respond to them. Agents without this permission do not see the Mail Queue. |
| **…with Mail Queue Selection as** | Determines whether the agents can choose mail messages themselves from the queue or automatically be assigned the message that has been in the queue the longest.<br>Choices include:<br>♦ **Any Message Waiting**<br>♦ **Message Waiting Longest** |
| **…and Maximum Concurrent Mail Sessions** | Determines the maximum number of mail messages the agent may handle concurrently.<br>Choices include **1** through **10**. |
| **…and Archive** | Allows the agent to store a customer mail message away from the Mail Queue without having to reply to the message.<br>The mail message is accessible via the Reports Portal. |
| **…and Forward from the Queue** | Allows the agent to forward mail messages from the queue to another department. |

| Permission Title | Definition |
|---|---|
| **…and Forward to Another Agent** | All agents have the ability to forward mail to a department queue, but this permission allows the agent to hand off customer mail messages to other agents. |
| **…and Forward to the Account Default Level** | Allows the agent to forward customer mail messages to the Account (default) department in addition to other departments. |
| **Answer Customer Mail** | |
| **…and Filter Mail Queue** | Allows the agent to filter the messages in the Mail Queue based on department, text, and date. |
| **…and Reply to Multiple Customer Mail Messages at the Same Time** | Allows the agent to respond to multiple mail messages with one reply. |
| **…with Mark for Follow-up** | Allows the agent to mark a customer mail message for future follow-up. |
| **Answer Follow-up Customer Mail** | Allows the agent to respond to customer mail messages that have been marked for follow-up. Without this permission, they cannot see mail messages that have been marked for follow-up. |
| **…and Show Other Agents Follow-up Mail** | Allows the agent to see mail messages that have been marked for follow-up by other agents. Without this permission, they only see messages they have marked for follow-up. |
| **View Agent Mail Sessions** | Allows the agent to view a list of other agent reply mail sessions. |
| **Create New Mail** | Allows the agent to create mail messages to send to customers. |
| **Manage Removed Mail** | Provides agent access to the Mail Removed tab in the Agent Console, which displays messages removed from the Mail Queue. |
| **Play Sound When Customer Mail Enters Queue** | Allows you to determine the conditions for playing a notification sound when a customer mail message enters the queue. If the Agent Availability is set to **Unavailable**, no sound plays regardless of the setting.<br>You can set the notification sound to play for any of the following conditions:<br>♦ **Never**<br>♦ **If Customer Enters Empty Queue**<br>♦ **If Agent Has No Sessions Open**<br>♦ **Always** |

| Permission Title | Definition |
|---|---|
| **Display Pop-Up When Customer Mail Enters Queue** | Allows you to determine the conditions for showing a notification window when a customer mail message enters the queue. If the Agent Availability is set to **Unavailable**, no notification window is displayed, regardless of the setting.<br>You can set the notification window to be displayed for any of the following conditions:<br>♦ **Never**<br>♦ **If Customer Enters Empty Queue**<br>♦ **If Agent Has No Sessions Open**<br>♦ **Always** |
| **Utilize Department Mail Queue Distribution** | |
| **…by Enabling Automatic Mail Message Assignment** | Allows the agent to receive assigned mail messages from departments that have the Queue Distribution method set to **Enabled**. |
| **…with Maximum Number of Mails to Auto-Accept** | Sets the maximum number of mail sessions that automatically open in the Agent Console for this agent.<br>Choices are:<br>♦ **0:** Agent takes mail manually<br>♦ **1 – 10**: Agent auto-accepts mail |
| **…with Unassigned Mail Messages Hidden in Queue** | Mail messages in the queue that are not assigned are hidden from the agent.<br>**Important:** If the Queue Distribution Method is enabled *and* Mail Incident Routing has been enabled for any of the departments to which the agent is assigned (see Incoming Mail Settings), this permission is overridden and disabled automatically. Thus, unassigned mail messages are shown to the agent. See Automatic Queue Distribution and Permissions for more information. |
| **…with Customer Mail Assigned to Other Agent Visible in Queue** | Allows the agent to view and take mail messages that are assigned to other agents. |

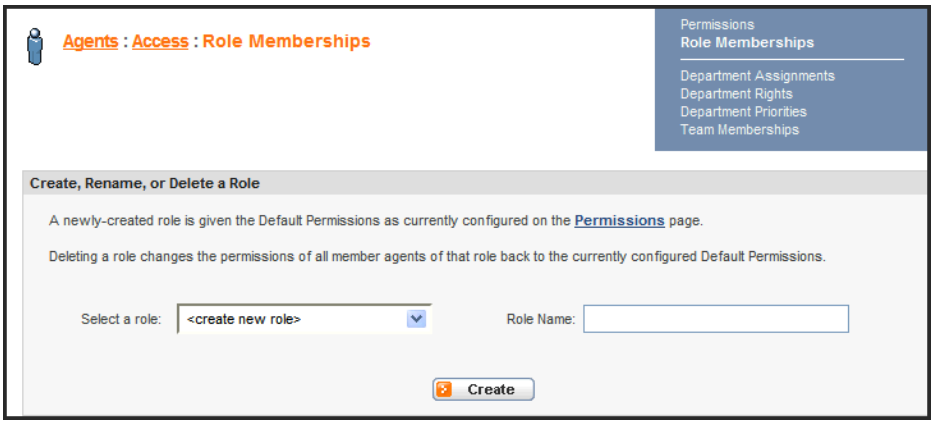
The following table defines additional global permissions pertaining to the **Agent Console**:




| Permission Title | Definition |
|---|---|
| **Private Message Another Agent** | Allows the agent to send private messages to other agents logged into the Agent Console. |
| **Broadcast Alerts to Other Agents** | Allows the agent to send text alerts to all agents or all agents in a particular department via the Agent Room. |
| **View Agents Assigned to Other Departments** | Allows the agent to view all agents logged into the account in the Agent Lists for:<br>♦ Agent Room<br>♦ Chat Transfer panel<br>♦ Mail Forward panel<br>If this permission is not enabled, the agent can only view the agent lists that share a common department assignment. |
| **Create Desktop Shortcut** | Allows the agent to create a shortcut that launches the Agent Console from the desktop. This feature requires that you configure Java Webstart to have the Shortcut Creation advanced setting to allow the creation of shortcuts. |
| **Block Customer History Reports** | Allows the agent to run customer look-up reports from within the Agent Console. If enabled, the agent is not able to run any of the Agent Console Lookup Reports. |
| **Spell Check** | Allows the agent to perform automatic spell-checking upon sending outgoing chats and mail messages.<br>Choices include:<br>♦ **Manual Check Only**<br>♦ **Auto Check (Chat Only)**<br>♦ **Auto Check (Mail Only)**<br>♦ **Auto Check (Chat and Mail)** |

| Permission Title | Definition |
|---|---|
| **Spell Check Default Dictionary** | Allows the agent to choose which dictionary is used for spell-check.<br>Choices include:<br>♦ **American-English**<br>♦ **British-English**<br>♦ **Canadian-English**<br>♦ **French**<br>♦ **German**<br>♦ **Italian**<br>♦ **Spanish**<br>♦ **Swedish** |
| **Inactivity Timeout** | Sets the limit for inactivity after which the agent is logged out of the Agent Console.<br>Choices include:<br>♦ **Never**<br>♦ **After 1 Minute** to **After 8 hours** |
| **Initial Availability at Login** | Determines the initial availability status for the agent when logging into the Agent Console.<br>Choices include:<br>♦ **Available**<br>♦ Up to five (5) **Unavailable** states created on the Agents: Shared: Availability States page. |

## Role Memberships




Use this page to create, rename or delete roles, and assign to or remove agents from those roles.

A role is a group of agents with a common set of permissions. The permissions apply to any agent currently assigned to the role and any assigned to the role in the future. Changes made to the permissions of a role affect all agents assigned to that role.

### To create a role:

**Note:** Upon opening this page, **<Create New Role>** is the default selection.

1. If not already appearing in the Select a Role box, select **<Create New Role>** from the menu.

   **Note:** There may or may not already be roles defined for your company. If so, these roles are listed in the menu.

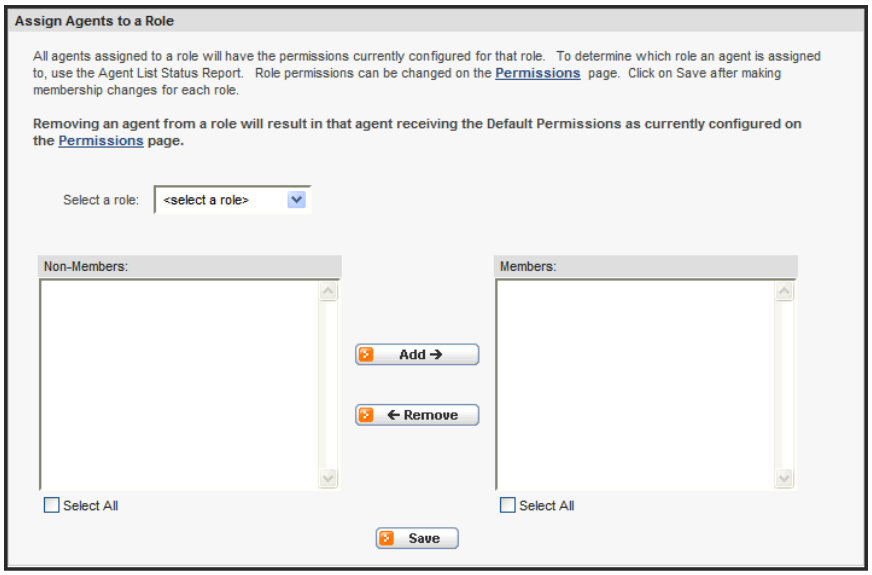
2. Type the desired name in the Role Name box.
3. Click **Create**. A message appears above this page section to confirm the new role creation.

### To rename or delete a role:

1. From the menu, select the role you want to rename or delete. The **Create** button is replaced by the **Save** and **Delete** buttons.
2. Do **one** of the following:
   - To rename a role, type the new name in the Role Name box, and click **Save**.
   - To delete a role, click **Delete**, and click **OK** to confirm the deletion.

   **Note:** A message appears above this page section confirming your renaming or deletion.

## To edit a role:




1. Under Assign Agents to a Role, from the menu, click the role you want to edit.

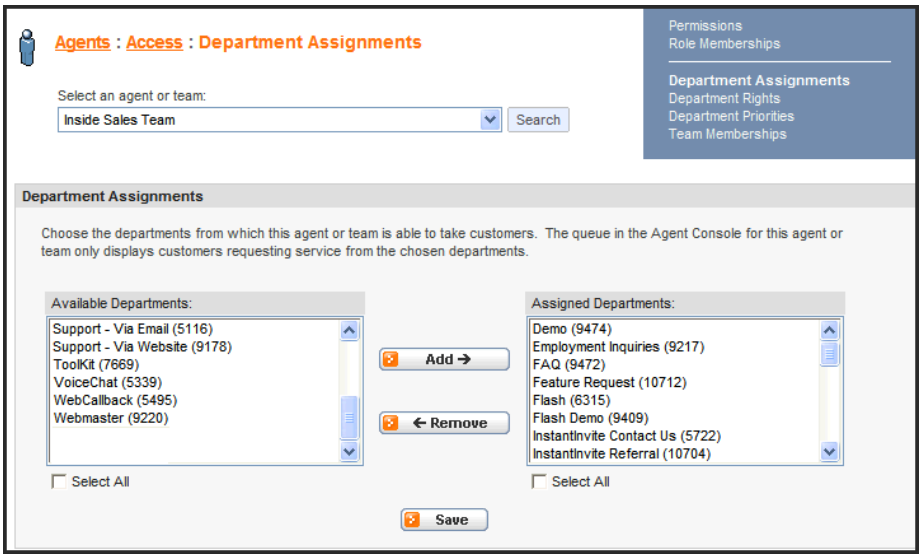
**Note:** Use the key combinations **Shift+Click** or **Ctrl+Click** to select multiple agents, or select the **Select All** check box to include all agents in the list.

2. To add agents to a role:
   - From the Non-Members panel, select the agents you want to add.
   - Click **Add**.
   - When you have completed adding agents to the role, click **Save**.
3. To remove agents from a role:
   - From the Members panel, select the agents you want to remove from the role.
   - Click **Remove**.
   - When you have completed removing agents from the role, click **Save**.

**Note:** A link is available on this page to provide easy access to the Permissions page. For more information, see the Permissions section.

## Department Assignments

Use this page to specify the departments from which your agents can take chats and mail messages. Agents only see customer requests for the departments to which they are assigned. You can assign individual agents or groups of agents by using teams.




### To edit an agent or team department assignment:

1. From the menu, select the agent or team whose department assignment you want to edit.

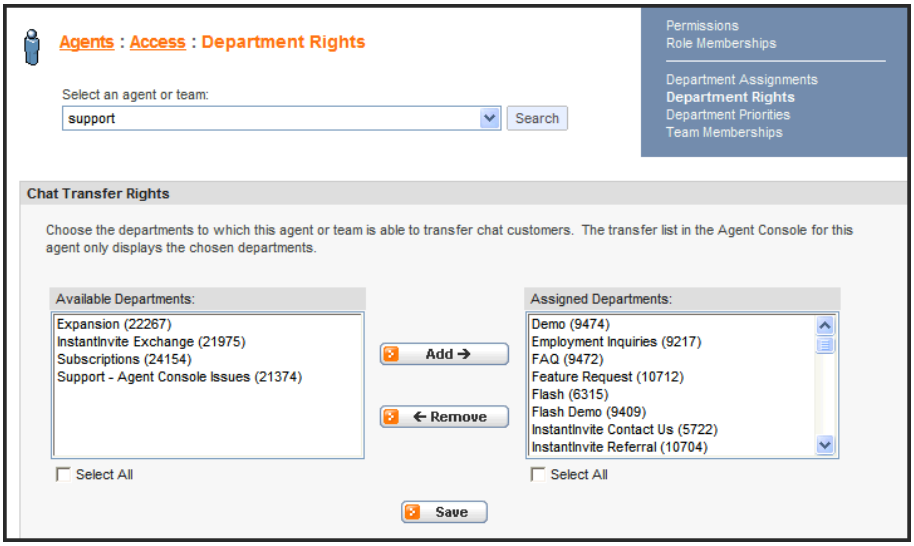
   **Note:** Use the key combinations **Shift+Click** or **Ctrl+Click** to select multiple departments, or select the **Select All** check box to include all departments.

2. Do the following to **add** an agent or team to a department:
   - From the Available Departments panel, select the department to which you want to assign the agent or team.
   - Click **Add**.
   - When you have completed assigning departments to an agent or team, click **Save**.
3. Do the following to **remove** an agent or team from a department:
   - In the Assigned Departments panel, select the department from which you want to un-assign the agent or team.
   - Click **Remove**.
   - When you have completed removing department assignments from an agent or team, click **Save**.

## Department Rights

Use this page to specify the departments to which your individual agents can transfer chats and forward mail messages. When agents attempt to transfer a chat or forward a mail message, their respective transfer/forward list only shows the departments to which they have rights.

### To edit agent or team chat transfer rights:

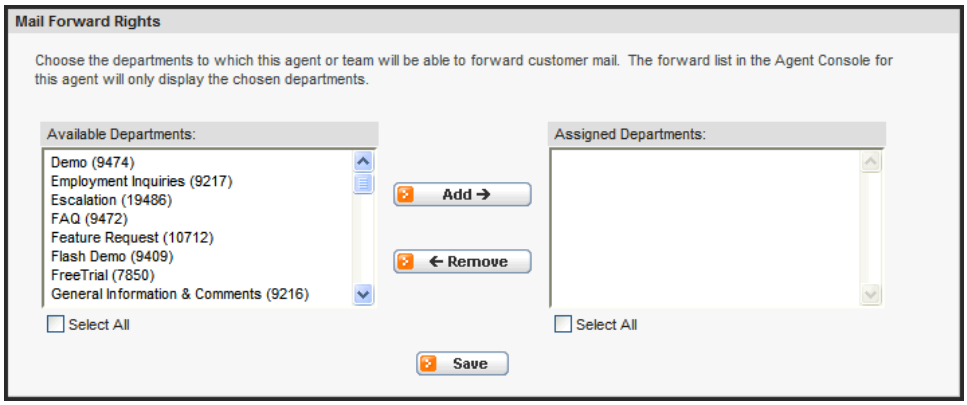



1. From the menu, select the agent or team for which you want to edit department rights.

   **Note:** Use the key combinations **Shift+Click** or **Ctrl+Click** to select multiple departments, or select the **Select All** check box to include all departments.

2. To **add** chat transfer rights for the agent or team:
   - Under Chat Transfer Rights, from the Available Departments panel, select one or more departments to which you want to give the agent or team transfer rights.
   - Click **Add**.
   - When you have completed adding department rights to an agent or team, click **Save**.
3. To **remove** chat transfer rights from an agent or team:
   - From the Assigned Departments panel, select one or more departments from which you want to remove the agent transfer rights.
   - Click **Remove**.
   - When you have completed removing department rights from agents, click **Save**.

### To edit agent or team mail forward rights:




1. From the menu at the top of the page, select the agent or team for which you want to edit department rights.

   **Note:** Use the key combinations **Shift+Click** or **Ctrl+Click** to select multiple departments, or select the **Select All** check box to include all departments.

2. To **add** mail forward rights to an agent or team:
   - Under Mail Forward Rights, from the Available Departments panel, select one or more departments to which you want to give the agent forward rights.
   - Click **Add**.
   - When you have completed adding department rights to an agent or team, click **Save**.
3. To **remove** mail forward rights from agents or teams:
   - From the Assigned Departments panel, select one or more departments from which you want to remove the agent forward rights.
   - Click **Remove**.
   - When you have completed removing department rights from an agent or team, click **Save**.

## Department Priorities

This page allows you to manage department priority for agents and teams. Agent and team priority is used to route and assign chat requests to the most appropriate agent.

**Note:** Before using this page, determine how each agent or team should be prioritized in the departments to which they are assigned. Some factors to consider include time on the job, and amount of knowledge and experience agents have in those departments.

- An agent or team always has an assigned priority status in a department. The agent or team's priority level is always either **High**, **Medium**, or **Low** in each department. The default priority is always **Medium**.

- If an agent or team is unassigned from a department and later re-assigned to the same department, the agent's priority level is reset to Medium for that department.
- If an agent is removed from a Team that is assigned to a department, the associated priority level for the agent defaults to Medium for the department.
- Any change to an agent's priority level for a department requires an agent to log out and back in to get the agent's new priority level for a department.

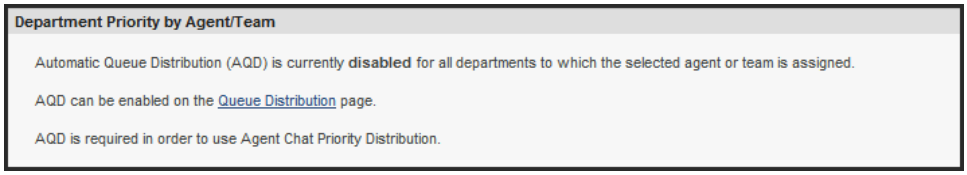
When you save a change to the Department Priority by Agent/Team pane, the system updates the list of departments displayed in the following locations:

- The Available Departments pane of the Manage Departments by Priority Level section.
- The Department Priorities pane of the Manage Departments by Priority Level.

Other things to note:

- The list of agents or teams in the Select an Agent or Team menu includes all agents and teams for the entire account.
- An agent's name is excluded from the Select an Agent or Team menu when an agent is a member of a team. When an agent is removed from a team via the Agents: Access: Team Memberships page, the agent is then listed in the Agents section of the Select an Agent or Team menu.

When an agent is selected whose list of department assignments does not include any departments with AQD enabled for chat, the following message is displayed:




**Note:** Click the **Queue Distribution** link in this section to go to the Departments: Chat: Queue Distribution page.

For more information on how priority level works, see the Agent Priorities section.

## Department Priority Levels

Each department should first determine how they define each priority level. Some factors you may want to consider include time on the job, and amount of knowledge and experience.

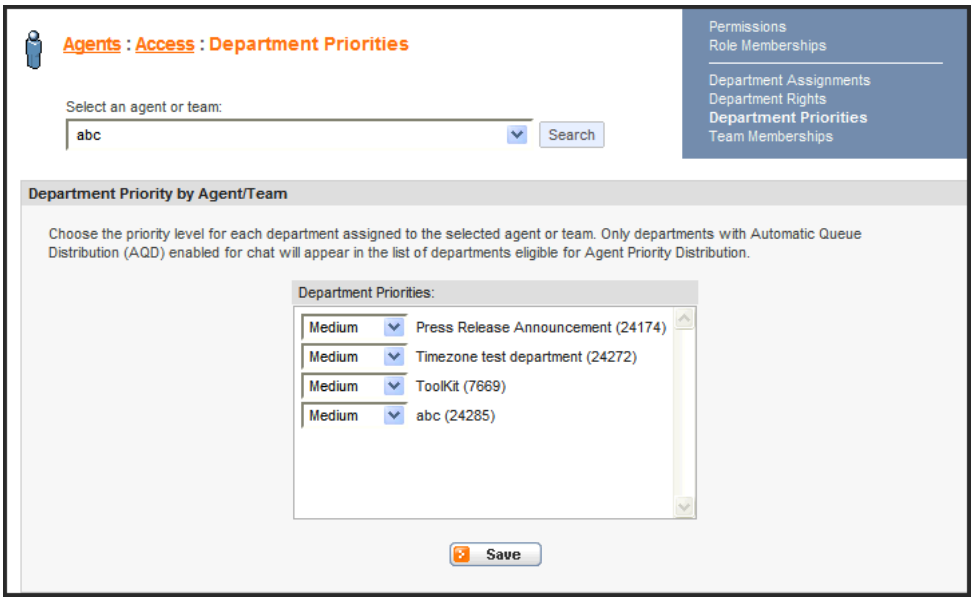
The following priority levels are available for agents:

- High
- Medium (set as the default value)
- Low

## Department Priority by Agent/Team

The list of departments in the Department Priorities pane includes departments with Automatic Queue Distribution (AQD) enabled for chat to which the selected agent/team is assigned.

## To set department priority for an agent or team:




1. From the menu at the top of the page, select the agent or team for which you want to set department priority. The Department Priorities pane changes to reflect the departments to which the agent or team is assigned.
2. From the menus in the Department Priorities pane, select the appropriate priority level for each department.
3. Click **Save**.

## Manage Departments by Priority Level

You can choose the priority level and manage the membership of departments to the chosen priority level of the selected agent or team. Only departments with Automatic Queue Distribution (AQD) enabled for chat appear in the lists of departments eligible for Agent Priority Distribution.

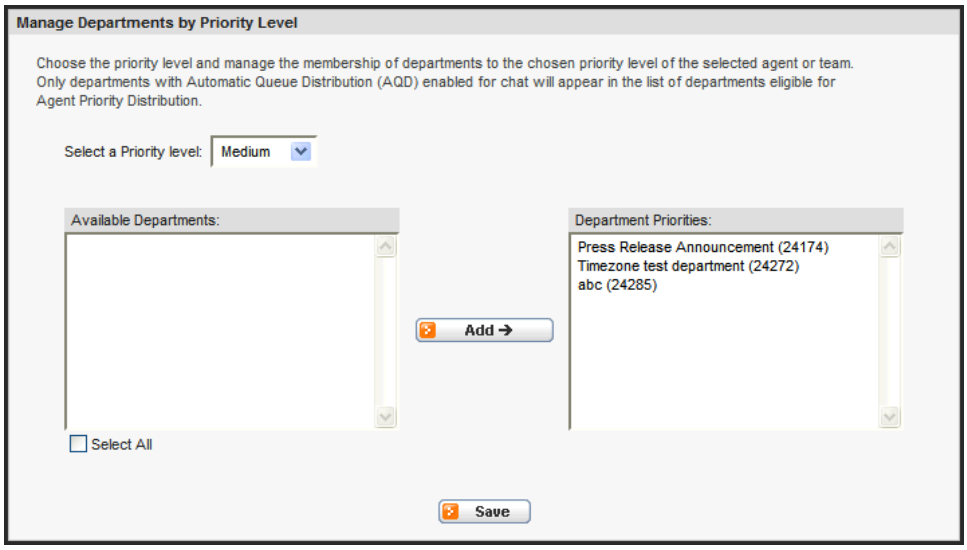
If an agent or team is assigned to one or more departments with AQD enabled for chat on the Departments: Chat: Queue Distribution page, then the Manage Departments by Priority Level section is displayed. If an agent or team is assigned only to departments with AQD disabled for chat, the Manage Departments by Priority Level section is not displayed.

### To manage departments by priority level:

1. When you select a priority level, all agents and teams assigned to departments that share the selected priority level are displayed in the Department Priorities pane. The Available Departments pane lists all agents and teams assigned to departments whose priority level does not match the selected priority level.
2. Add departments to a priority level by selecting rows in the Available Departments pane and clicking the **Change** button. You can select one or more departments to add to the list of departments in the Department Priorities pane.
3. Add all departments by selecting the **Select All** check box under the Available Departments pane.

When you save a change to the list of departments listed in the Department Priorities pane for the selected priority level, the system updates the list of departments:

- In the Department Priorities pane on the Department Priority by Agent / Team section, and
- In the Available Departments pane on the Manage Departments by Priority Level section



## Team Memberships

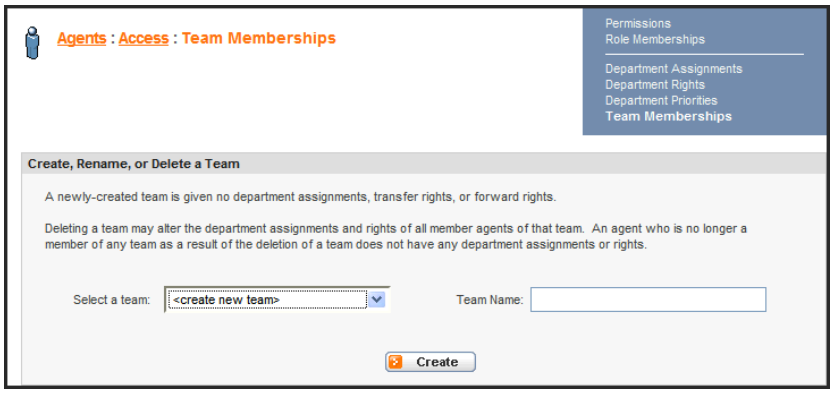
Teams are groups of agents that all use the same department assignments, chat transfer rights, and mail forwarding rights. Agents assigned to a team automatically assume the department assignments and rights for that team.

If an agent is a member of more than one team, they acquire the department assignments and rights for each of those teams. Changing the department assignments and rights for a team automatically changes the department assignments and rights for all agents assigned to that team.

Agents not assigned to any teams are considered individual agents. However, you can still assign individual agents to departments manually and give them transfer and forwarding rights.

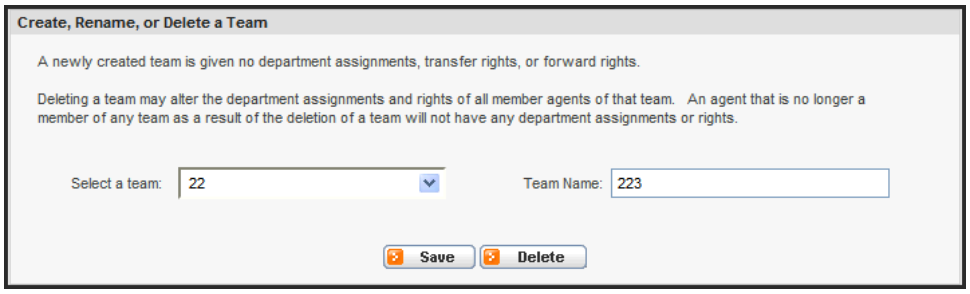
> **Important:** Team names must be unique, contain at least one character, and be less than 100 characters long. New teams do not have any departments assigned, chat transfer rights, or mail forwarding rights.
>
> For more information on how to change these settings, see the Department Assignments and Department Rights sections.

### To create a team:




1. Under Create, Rename, or Delete a Team, from the menu, select **<Create New Team>**.
2. Type the desired team name.
3. Click **Create**. A message appears near the top of this page to confirm the new team creation.

## To rename or delete a team:



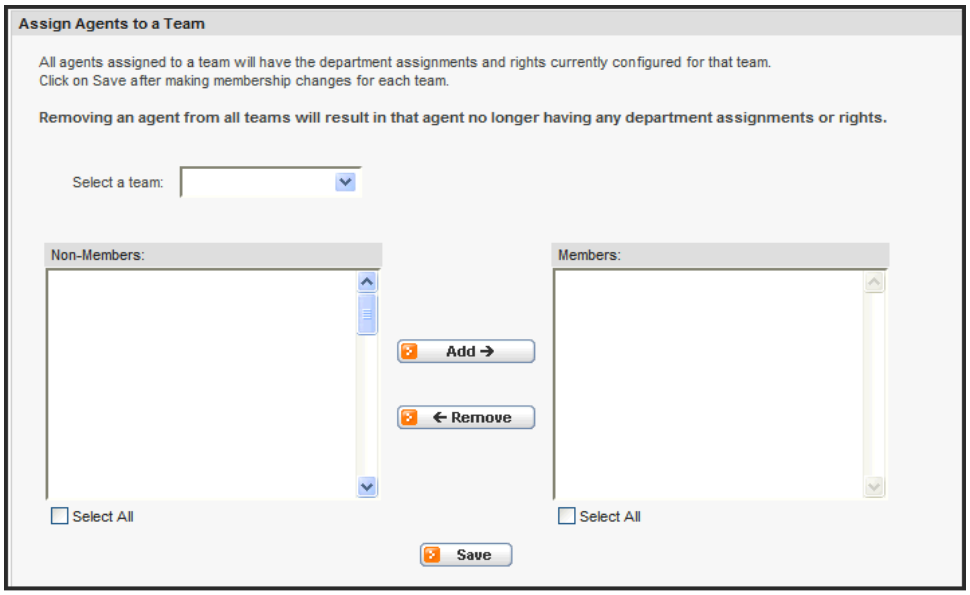

1. From the menu, select the team name you want to edit.
2. To rename the team:
   - In the Team Name box, type the new team name.

**Note:** Use the same naming criteria as you used for creating a team.

   - Click **Save**. A message appears near the top of this page to confirm the team name change.
3. To delete a team:
   - Click **Delete**.
   - Click **OK**. A message appears near the top of this page to confirm the deletion of the team.

**Note:** Deleting a team may alter the department assignments and rights of all member agents of that team. An agent who is no longer a member of any team as a result of the deletion of a team does not have any department assignments or rights.

## To assign agents to or remove agents from a team:




1. Under Assign Agents to a Team, from the menu, select the team that you want to edit.

**Note:** Use the key combinations **Shift+Click** or **Ctrl+Click** to select multiple agents, or select the **Select All** check box to include all agents.

2. To **assign** agents to a team:
   - From the Non-Members panel, select which agent(s) you want to add to that team.
   - Click **Add**.
   - When you have completed assigning agents, click **Save**.
3. To **remove** agents from a team:
   - From the Members panel, select the agents you want to remove from the team.
   - Click **Remove**.

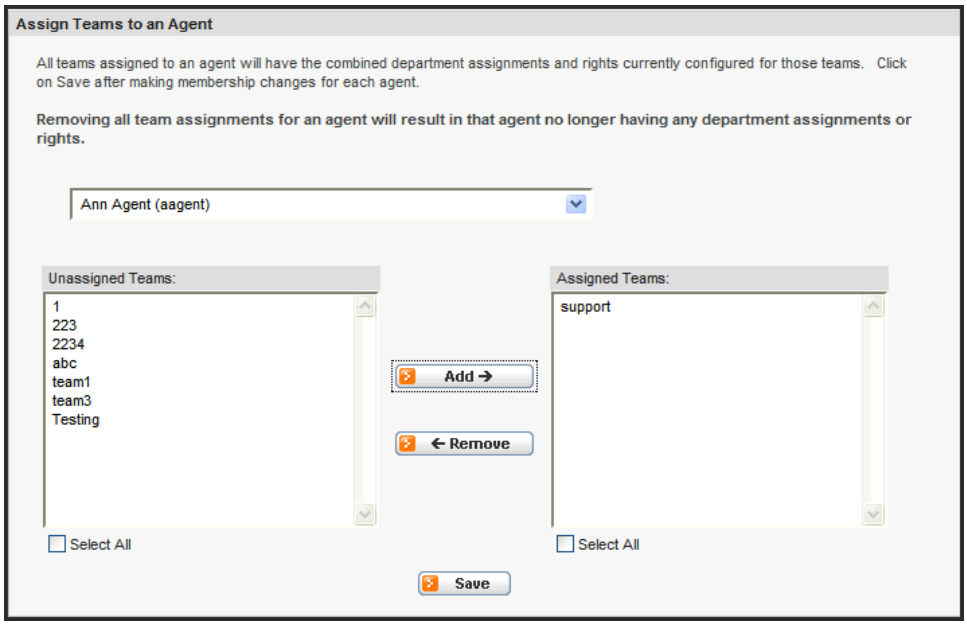
**Important:** Removing an agent from all teams results in that agent no longer having any department assignments or rights.

   - When you have completed removing agents, click **Save**.

## Managing Team Assignments for an Individual Agent

In this section, you can edit individual agent team membership.

### To add an agent to or remove an agent from a team or teams:




1. Under Assign Teams to an Agent, from the menu, select an agent you want to edit. A list of teams to which the agent is not assigned appears in the Unassigned Teams panel.

   **Note:** Use the key combinations **Shift+Click** or **Ctrl+Click** to select multiple agents. To select all teams from the list, click the **Select All** check box.

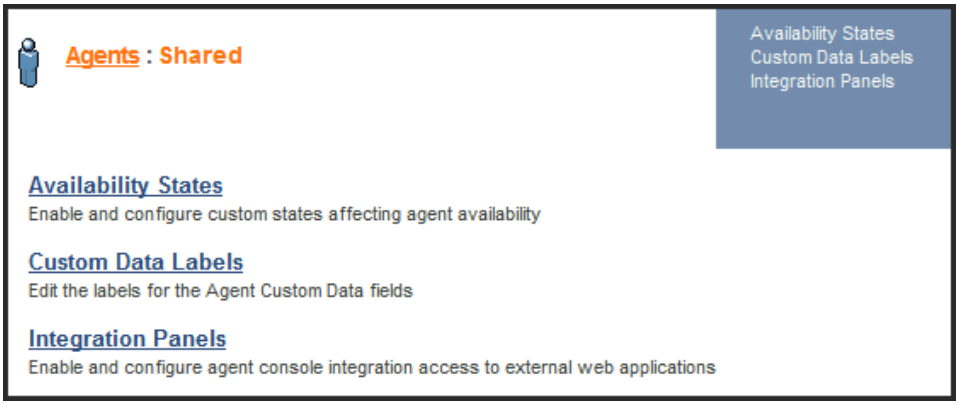
2. To **add** the agent to a team or teams:
   - Select the teams to which you want to add the agent.
   - Click **Add**.
   - When you have completed assigning teams to the agent, click **Save**.
3. To **remove** an agent from a team or teams:
   - From the Assigned Teams panel, select the teams you want to remove from the agent.
   - Click **Remove**.
   - When you have completed removing teams from the agent, click **Save**.

## Shared

Use this section to edit the following settings:

- Enable and configure custom state labels affecting agent availability.
- Edit the labels for the Agent Custom Data fields.
- Enable and configure Agent Console integration access to external web applications.

**Note:** These settings apply to all agents.



## Availability States

Use this page to configure the availability states used by all agents in your account. You can choose between providing only one non-custom manual state choice for your agents or provide up to five (5) custom choices.

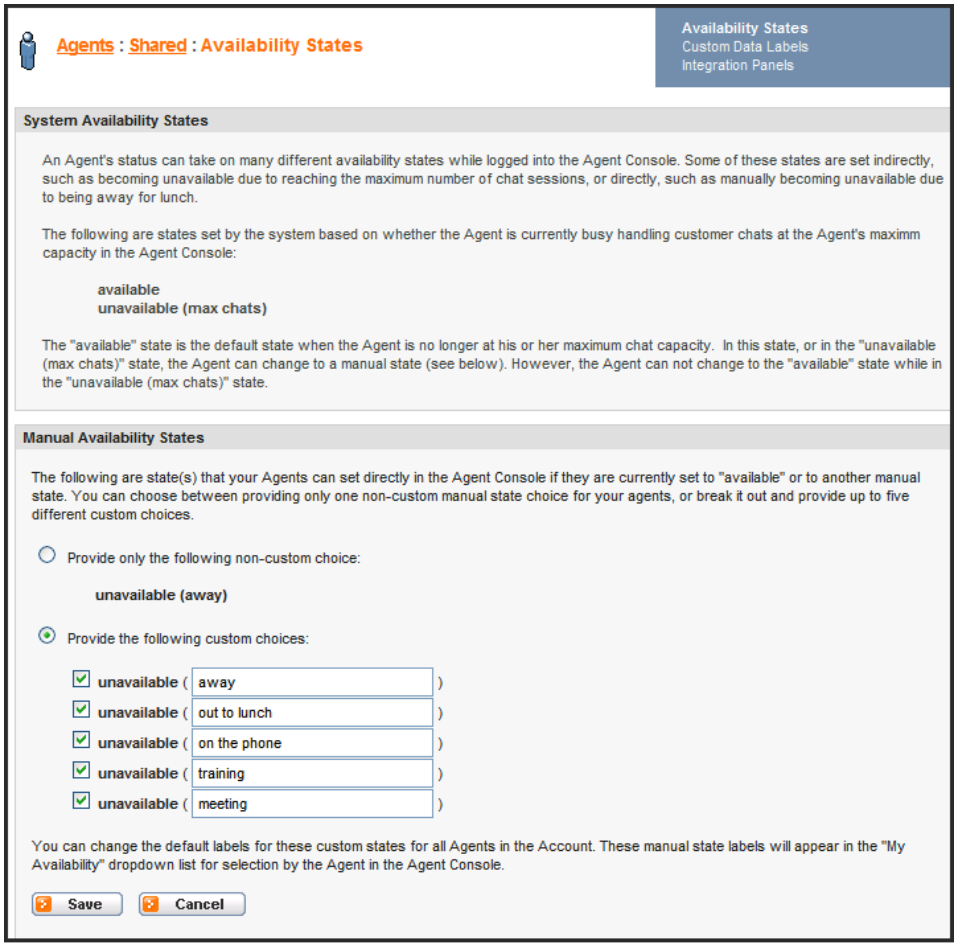
An agent status can take on many different availability states while logged into the Agent Console. Some of these states are set:

- **Indirectly**, such as becoming unavailable due to reaching the maximum number of chat sessions.
- **Directly**, such as manually becoming unavailable due to being away for lunch.

The following are states set by the system based on whether the agent is currently busy handling customer chats at the Agent Maximum Capacity in the Agent Console:

- **Available**
- **Unavailable (Max Chats)**

The **Available** state is the default state when the agent is no longer at his or her maximum chat capacity. In this state, or in the **Unavailable (Max Chats)** state, the agent can change to a manual state. However, the agent cannot change to the Available state while in the Unavailable (Max Chats) state.



### To set the availability states for all agents:

1. Under Manual Availability States, select **one** of the following options:
   - Provide Only the **Non-Custom Choice**.

   **Note:** If you select the non-custom choices option, your agents have a single choice when they are no longer set to Available: **Unavailable (Away)**.

   - Provide **Custom Choices**.
2. If you select the Custom Choices option, select the check box or check boxes, and type the labels you want to use as choices for your agents when they set themselves as **Unavailable**. You can create up to five (5) unavailable states for your agents.

   **Note:** The changes you make here affect the choices agents can make in the Agent Console.

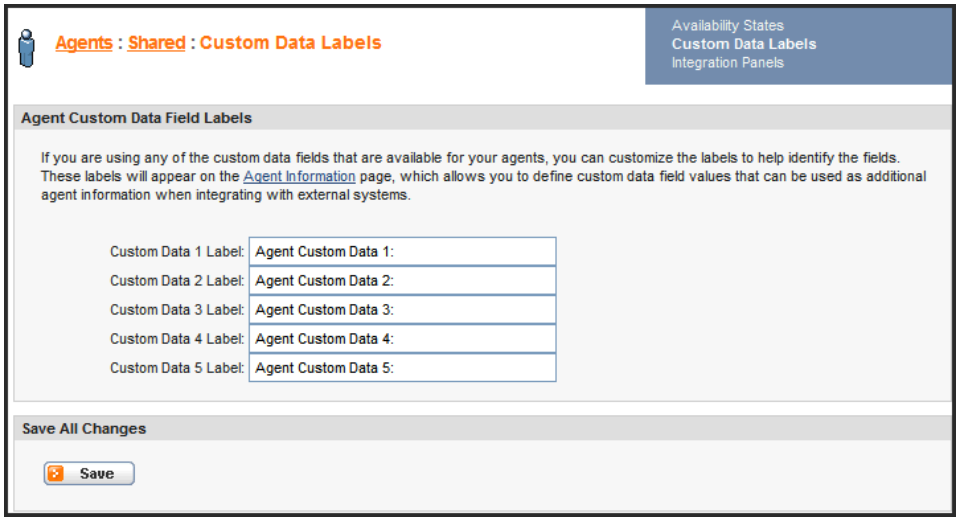
3. When you have made your selection and completed any label creation, click **Save**.

## Agent Custom Data Field Labels

The optional Agent Custom Data Field Labels are used to send agent information to external applications via the various integration panels in the Agent Console.

The labels can be customized on an account-level basis on the Agent Custom Data Field Labels page. The field values can be set when a new agent is created and modified on the Agent Information page.

The fields and labels can be accessed via tokens during chat and mail sessions, and can be used to send information to external applications using the integration points available in the Agent Console.

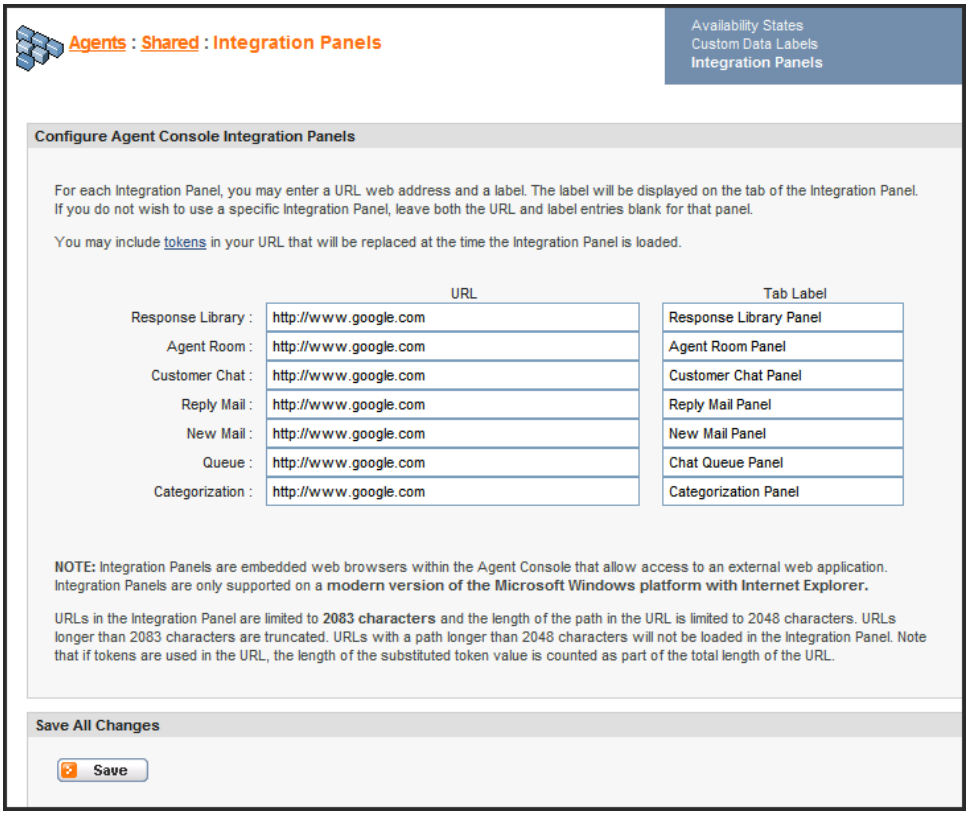



**Note:** For more information, see the Optional Data Labels section.

## Integration Panels

The Integration Panel feature allows you to include external web-based content in the Agent Console. This allows your agents to access web-based applications without having to leave the Agent Console. Agents can potentially access the following integration panels in the Agent Console:

- **Response Library:** This integration panel is not context-sensitive and is visible no matter which session is open. It is located in the Agent Console Response Library panel.
- **Agent Room panel**.
- **Customer Chat panel**.
- **Reply Mail panel**.
- **New Mail panel**.
- **Queue:** This integration panel is not context-sensitive and is visible no matter which session is open. It is located in the Agent Console Queue panel.
- **Categorization:** Located in the Agent Console Reply Mail panel.




**Note:** Click the **Tokens** link on the Integration Panels page to review a list of acceptable tokens.

For each integration panel, you can:

- Specify the URL and tab label.
- Use tokens to represent values replaced by the system.

For URLs in the integration panels:

- Character length is limited to 2083.
- URL path length is limited to 2048 characters.
- URLs longer than 2083 characters are truncated.
- URL paths longer than 2048 characters are not loaded in the integration panel.
- If you are using tokens in your URL, the length of the substituted token is counted against the total length of the URL.

### Firewall/Security Issues

The integration panel embeds a browser component into the Agent Console. For example, under Windows, this means embedding Internet Explorer.

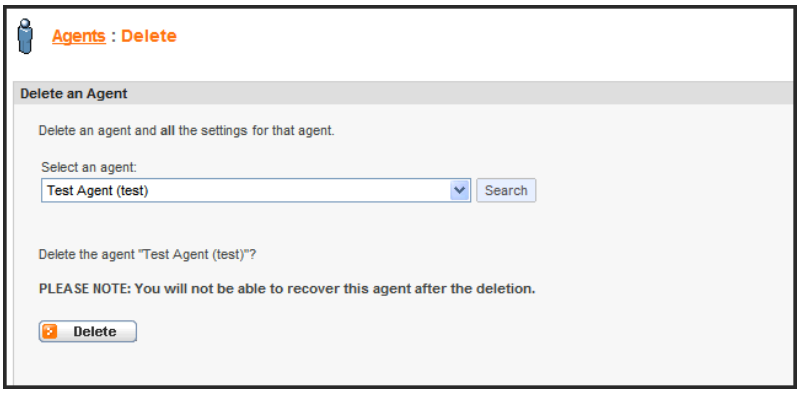
> **Note:** Any security flaws associated with the web browser you use are therefore present in the integration panel.

The integration panel in the Agent Console runs as a separate process under all supported platforms. Consequently, the agent may see a warning from any firewall software that is installed (including the default firewall software that accompanies your browser), notifying the agent of an attempt to make an outbound connection. This is normal and agents should allow the connection.

For convenience, your system administrator may choose to configure the firewall so that it always allows this connection.

## Delete

Deleting an agent permanently removes him or her from the system and is irreversible. Once deleted, agents can no longer log into the system. In addition, data for the agent is no longer available for the reports.




### To delete an agent:

1. From the menu, select the agent you want to delete from the system, and click **Delete**.
2. Click **OK** to confirm the deletion.

# Chapter 6: InstantInvite

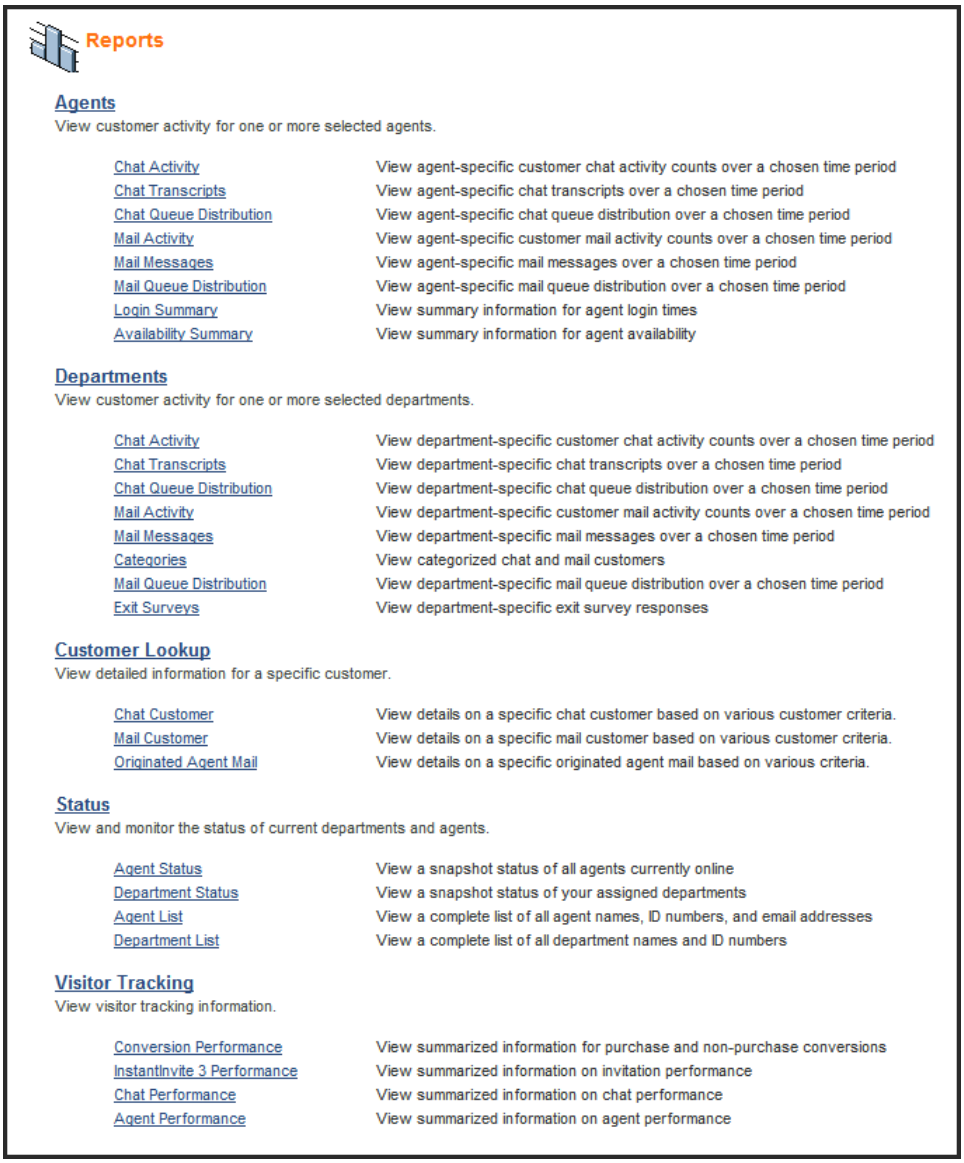
Use the InstantInvite Portal to access the setup, rule definitions, and invitations for InstantInvite. For more information, please refer to the *InstantInvite User Manual*.

# Chapter 7: Reports

The Reports Portal provides a list of reports you can run based on InstantService system data. The reports show saved data from a period you specify.

Links are provided on some reports to view specific detailed information.

Only agents with permission to run reports see this page and the links it contains.



Reports

**Agents**
View customer activity for one or more selected agents.

| | |
|---|---|
| Chat Activity | View agent-specific customer chat activity counts over a chosen time period |
| Chat Transcripts | View agent-specific chat transcripts over a chosen time period |
| Chat Queue Distribution | View agent-specific chat queue distribution over a chosen time period |
| Mail Activity | View agent-specific customer mail activity counts over a chosen time period |
| Mail Messages | View agent-specific mail messages over a chosen time period |
| Mail Queue Distribution | View agent-specific mail queue distribution over a chosen time period |
| Login Summary | View summary information for agent login times |
| Availability Summary | View summary information for agent availability |

**Departments**
View customer activity for one or more selected departments.

| | |
|---|---|
| Chat Activity | View department-specific customer chat activity counts over a chosen time period |
| Chat Transcripts | View department-specific chat transcripts over a chosen time period |
| Chat Queue Distribution | View department-specific chat queue distribution over a chosen time period |
| Mail Activity | View department-specific customer mail activity counts over a chosen time period |
| Mail Messages | View department-specific mail messages over a chosen time period |
| Categories | View categorized chat and mail customers |
| Mail Queue Distribution | View department-specific mail queue distribution over a chosen time period |
| Exit Surveys | View department-specific exit survey responses |

**Customer Lookup**
View detailed information for a specific customer.

| | |
|---|---|
| Chat Customer | View details on a specific chat customer based on various customer criteria. |
| Mail Customer | View details on a specific mail customer based on various customer criteria. |
| Originated Agent Mail | View details on a specific originated agent mail based on various criteria. |

**Status**
View and monitor the status of current departments and agents.

| | |
|---|---|
| Agent Status | View a snapshot status of all agents currently online |
| Department Status | View a snapshot status of your assigned departments |
| Agent List | View a complete list of all agent names, ID numbers, and email addresses |
| Department List | View a complete list of all department names and ID numbers |

**Visitor Tracking**
View visitor tracking information.

| | |
|---|---|
| Conversion Performance | View summarized information for purchase and non-purchase conversions |
| InstantInvite 3 Performance | View summarized information on invitation performance |
| Chat Performance | View summarized information on chat performance |
| Agent Performance | View summarized information on agent performance |

## Output Formats

Several output formats are available for reports:

- **HTML:** Displays the report using the same graphics and font as the rest of the Account Administration application. This is the default output format for reports.
- **PRINT:** Displays the report in a new browser window. The printable report is displayed in black and white without graphical headers or menus. Use your browser Print function to print the page.
- **CSV:** Displays the report in a comma-separated values (CSV) file format. Follow the prompt to open or save the `.CSV` file. If you choose to open the file, the application configured to open `.CSV` files on your system starts. For many users, this is Microsoft Excel. Use the `.CSV` file format to import report results into another system, database, or application.
- **XML:** Displays the report as an XML file. Follow the prompt to open or save the `.XML` file. If you choose to open the file, the application configured to open `.XML` files on your system starts. For many users, this will be your browser. Use the .XML file format to import report results into an external XML-aware system or application.

## Agents

These reports are comprehensive summaries of agent activity within your account for a selected time period.

You may run reports for one or more agents up to a maximum of 1000. If there are over 1000 agents, the number of currently selected agents is displayed and updated as you select and de-select agents from the list.

You may also choose to display deleted agents. These agents are visually differentiated from active agents in the selection list.

### Running Agent Reports

Use the following procedure when running Agent reports.

#### To run an agent report:

1. From the Agents list, select the agent or agents for which you want to run a report.

   **Note:** Use the key combinations **Shift+Click** or **Ctrl+Click** to select multiple agents. To select all agents from the list, click the **Select All** check box.

   To include deleted agents, select the **List Deleted** check box.
2. Choose one of the following for your report:
   - A pre-defined range option, which include:
   - Today
   - Yesterday

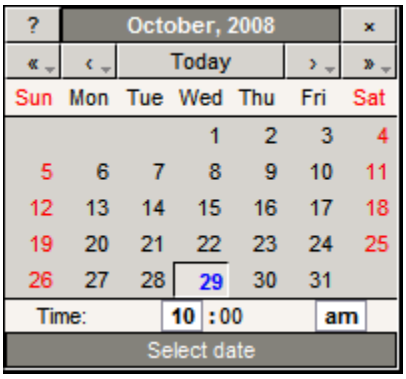
- This Week
- Last Week
- This Month
- Last Month
- A specific day

**Note:** The calendar associated with selecting a specific day has a date selector but no time selection. For more details on using the **Date/Time Selector**, see the next note.

- A specific date range

**Note:** To choose the specific day or date range, do **one** of the following:

- Use the menus to select month, day, year, and time.
- Click the icon. The Date/Time Selector calendar appears with today's date as the default.

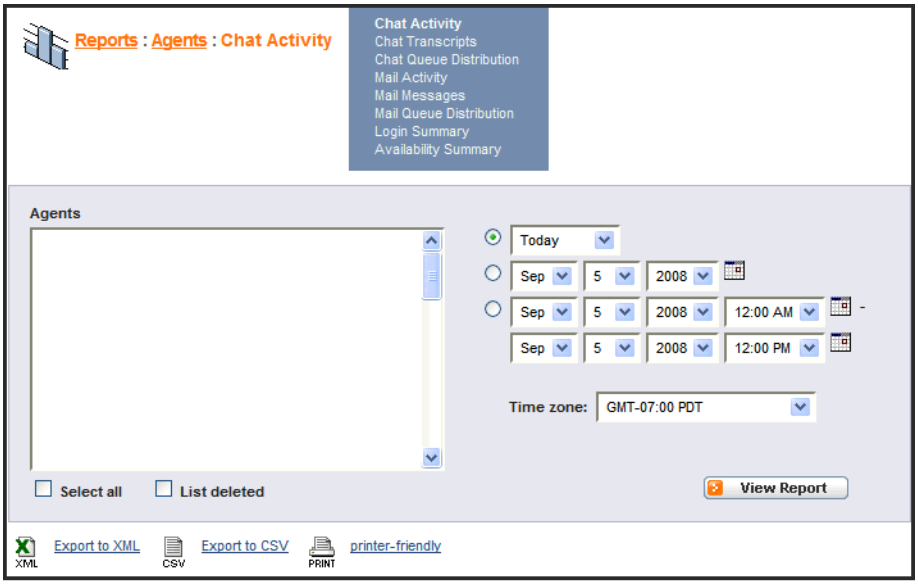



- Click « to view the previous year or » for the next year.
- Click ‹ to view the previous month or › for the next month.
- In the Time section, click and drag the hour box and the AM/PM box to make changes. This is not available when selecting only a specific date rather than date range.
- Click a day or × in the upper right corner to close the calendar and populate the corresponding date and time fields with the date and time that you selected in the calendar.

3. Accept the time zone based on your system clock, or choose a time zone.
4. Do one of the following:
   - Click **View Report** to produce the HTML version of the report.
   - Click the output format you want to produce:
   - Export to XML

- Export to CSV
- Printer-Friendly.

## Chat Activity




**Agent Chat Activity Summary**
Times are in the format (hour:min:sec)
*From: 09-01-2008 12:00 AM to 10-14-2008 1:00 PM GMT-07:00 PDT*

| Chat Summary | |
|---|---|
| Total Hours Online: | 132:14:42 |
| Total Handled: | 90 |
| Total Transferred: | 25 |
| Avg per hour: | 0.68 |
| Avg Session Time: | 0:07:38 |
| Avg Response Time: | 0:02:43 |

Links are available to detailed reports for:

- Agent Login Times
- Agent Chats Handled Activity
- Agent Chats Transferred Activity
- Agent Daily Chat Activity Summary

| Agent | Hours Online | Handled | Transferred | Avg. per hour | Avg. Session Time | Avg. Response Time | View Daily Chat |
|---|---|---|---|---|---|---|---|
| | 9:08:41 | 21 | 8 | 2.3 | 0:05:04 | 0:03:09 | |
| InstantService Support (is support) | 0:00:00 | 0 | 0 | 0 | 0:00:00 | 0:00:00 | |
| jay sandal (jsandal) | 15:25:34 | 10 | 4 | 0.65 | 0:11:18 | 0:00:56 | |
| jim corbett (jcorbett) | 10:48:55 | 9 | 3 | 0.83 | 0:08:54 | 0:05:25 | |
| jim walsh (jwalsh) | 0:09:31 | 2 | 0 | 12.59 | 0:03:10 | 0:00:00 | |
| Lvte Paulson | 1:43:50 | 0 | 0 | 0 | 0:00:00 | 0:00:00 | |
| Mario Aquilino | 86:45:39 | 48 | 10 | 0.55 | 0:07:56 | 0:01:57 | |
| | 0:00:00 | 0 | 0 | 0 | 0:00:00 | 0:00:00 | |
| Testy Tester (testyt) | 8:12:30 | 0 | 0 | 0 | 0:00:00 | 0:00:00 | |
| **Totals & Averages** | **132:14:42** | **90** | **25** | **0.68** | **0:07:38** | **0:02:43** | |

## Counts and Calculations

The **Agent Chat Activity Summary Report** provides the following counts and calculations:

| Counts / Calculations | Definition |
|---|---|
| **Hours Online** | The number of hours/minutes the agent was logged into the Agent Console during the selected time period. This is independent of the agent disposition (available or unavailable) while logged in. |
| **Chats Handled** | The sum of:<br>♦ All chat customers taken from the queue by an agent whose session ended during the selected time period.<br>♦ All chat customers that were transferred to and accepted by the agent whose session ended during the selected time period.<br>**Note:** Handle counts are session based; it is possible for the same chat customer to be handled more than once by an agent. |
| **Chats Transferred** | The count of all chat customers transferred by the agent either to another agent or to a department during the selected time period.<br>**Note:** Transfer counts are session-based; it is possible for the same chat customer to be transferred more than once by an agent. |
| **Average Chats Per Hour** | The average number of chats handled by the agent while logged in during the selected time period. This is calculated by taking the total number of chats handled by the selected agent and dividing it by the number of hours the agent was online. |

| Counts / Calculations | Definition |
|---|---|
| **Average Session Time** | The average length of chat sessions an agent had during the selected time period. This is calculated by taking the sum of all chat session times for chats handled an agent during the selected time period, and dividing it by the number of chats handled by that agent. |
| **Average Response Time** | The average response time for all chats handled by the agent during the selected time period. **Response time** is defined as the time from when a message is received from a customer to the time when the agent sends a response.<br>To get the average response time, the total response time is divided by the total number of responses. The following are all considered an **agent response**:<br>♦ The agent sends a message to the customer.<br>♦ The agent pushes a URL or file to the customer.<br>♦ The agent transfers the customer to a department or agent.<br>♦ The monitoring agent sends a message or pushes a URL or file to the customer.<br>♦ The agent that transferred the customer sends a message or pushes a URL or file to the customer.<br>♦ The customer is dismissed.<br>♦ The customer leaves the session. |

## Dispositions

The Chat Dispositions column is found in the detail report when you click links in either the Handled or Transferred column of the **Agent Chat Activity Summary Report**. Dispositions include:

| Disposition | Definition |
|---|---|
| **Completed** | The chat session ended and no other transfers or chat sessions took place. |
| **Transferred to Agent** | The chat customer was transferred between agents, bypassing the Chat Queue. |
| **Transferred to Department** | An agent transferred the chat customer to the same or different department Chat Queue. |

## Chat Transcripts

This report allows you to view transcripts of chats for selected agents for a defined time period.


Links are available to detailed reports for:

- Customer Record
- Chat Transcript (from the **View Transcript** icon)
- Chat Customer History Detail (from the **View Path** icon)

**Agent Chat Transcripts**
Times are in the format (hour:min:sec)
*From: 09-01-2008 12:00 AM to 10-14-2008 2:00 PM GMT-07:00 PDT*

| Customer ID | Customer | Department | Entered Queue | Wait Time | Agent | Disposition | View Transcript | View Path |
|---|---|---|---|---|---|---|---|---|
| 60016999 | | Test C | 09-02-2008 12:50:44 PM GMT-07:00 PDT | 0:00:11 | Mario Aquilino | Completed | | |
| 60017255 | | Test C | 09-02-2008 03:50:14 PM GMT-07:00 PDT | 0:00:14 | Mario Aquilino | Transferred to Test C | | |
| 60017278 | | Test C | 09-04-2008 08:57:45 AM GMT-07:00 PDT | 0:00:18 | Mario Aquilino | Transferred | | |
| 60017278 | | Test C | 09-04-2008 08:57:45 AM GMT-07:00 PDT | 0:00:18 | | Completed | | |
| 60017279 | | TEst D | 09-04-2008 09:09:11 AM GMT-07:00 PDT | 0:00:20 | | Transferred to Test A | | |
| 60017280 | | Test C | 09-04-2008 09:19:11 AM GMT-07:00 PDT | 0:00:29 | | Transferred to Test A | | |
| 60017281 | | Test C | 09-04-2008 09:31:03 AM GMT-07:00 PDT | 0:00:23 | | Transferred to TEst D | | |
| 60017281 | | TEst D | 09-04-2008 09:31:03 AM GMT-07:00 PDT | 0:00:23 | Mario Aquilino | Transferred | | |

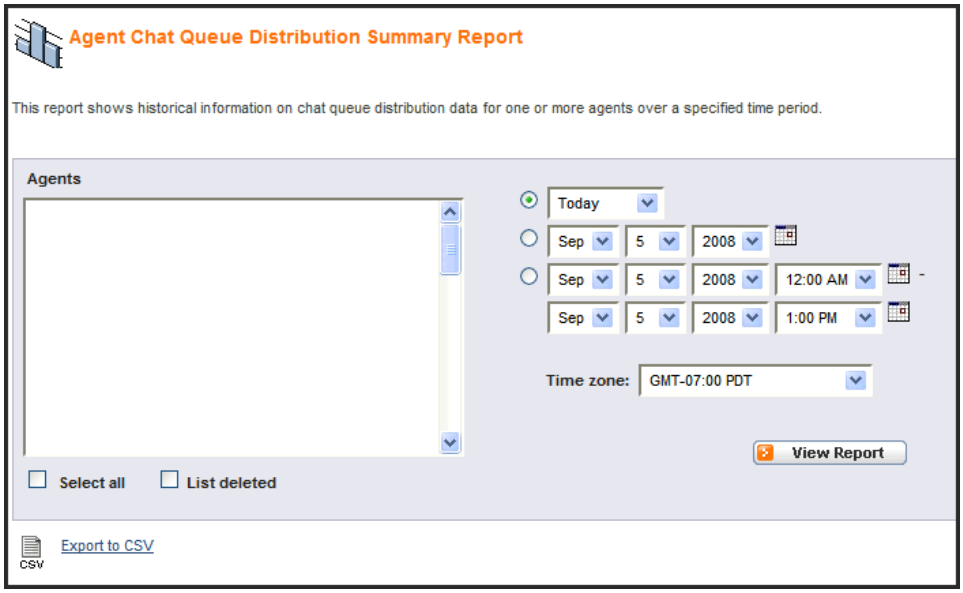
### Dispositions

The following dispositions are provided for the **Chat Transcripts Report**:

| Disposition | Definition |
|---|---|
| **Chat Missed** | The chat request was denied due to a closed queue or no available agents. |
| **Chat Abandoned** | An agent never took the customer out of the queue. |
| **Chat Transferred to Agent** | An agent transferred the customer to a different agent, bypassing the queue. |
| **Chat Transferred to Department** | An agent transferred the customer to the same department they were taken from or to a different department. |
| **Chat Customer Left** | The customer left before being taken by an agent following a transfer to a department. |

## Chat Queue Distribution

This report shows information on Chat Queue distribution for your agents during a selected time period.




**Note:** This report performs differently from other reports by opening in its own separate browser window and lacks the additional navigational links at the top of the page.

Links are available from this report to the **Agent Chat Queue Distribution Details Report**.

**Agent Chat Queue Distribution Summary**
*From: 09-01-2008 12:00 AM to 10-14-2008 2:00 PM GMT-07:00 PDT*

| Agent | Hours Available | Total Assigned | Distributed (Automatic) | Distributed (Agent-specific) | Assignment Expired | Taken by Assigned | Taken by Other | Agent Exited | Customer Exited |
|---|---|---|---|---|---|---|---|---|---|
| | 9:08:41 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| InstantService Support (is support) | 0:00:00 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| jay sandal (jsandal) | 11:51:37 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| jim corbett (jcorbett) | 10:48:55 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| jim walsh (jwalsh) | 0:09:31 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Lyte Paulson | 0:00:00 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Mario Aquilino (bpaulson) | 86:29:42 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| | 0:00:00 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Testy Tester (testyt) | 5:52:59 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| **Totals** | **124:21:28** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** |

10-24-2008 1:23 PM GMT-07:00

The statistics shown summarize the different types of events that are recorded for chat queue distribution assigned items. For agents with valid data for the selected time period, a report is available providing specific details on agent assigned chats.

Detailed reports list the department each chat came into, the time each chat was assigned to the particular agent, and the time and type of the event that occurred.

The events recorded for Chat Queue distribution are:

- Total Assigned
- Chats automatically distributed (Distributed – Automatic)
- Chats agent-specifically distributed (Distributed – Agent-Specific)
- Assignment expired
- Agent took assigned item (Taken by Assigned)
- Assignment taken by another agent (Taken by Other)
- Agent exited while item was assigned (Agent Exited)
- Customer exited while item was assigned (Customer Exited

**Note:** If an agent is available and the end time for the report is in the future, the Hours Available statistic reflects how long the agent has been available up until the time when the report ran.

## Statistics

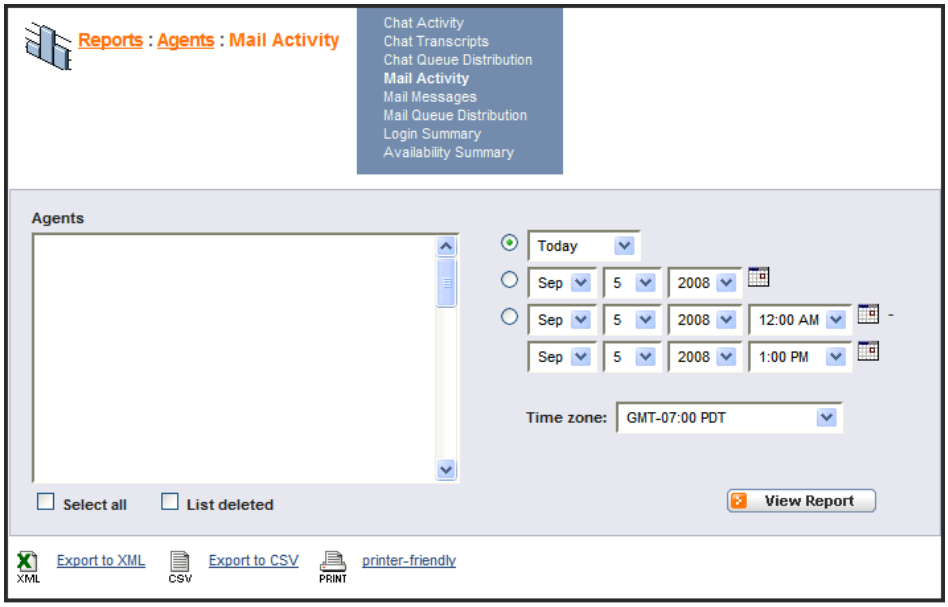
The **Agent Chat Queue Distribution Summary Report** provides the following statistics for each selected agent:

| Disposition | Definition |
|---|---|
| **Hours Available** | The number of hours/minutes the agent was logged into the Agent Console and was available for to take chats during the selected time period. |
| **Total Assigned** | The total number of Chat Queue distribution events that occurred for the agent during the selected time period. |
| **Distributed (Automatic)** | This method uses system algorithms based on agent availability to distribute chats. |

| Disposition | Definition |
|---|---|
| **Distributed (Agent-Specific)** | This method is based on your own agent requirements for chat distribution. |
| **Assignment Expired** | The total number of chats assigned to the agent that expired during the selected time period. |
| **Taken by Assigned** | The total number of chats that assigned to the agent and taken during the selected time period. |
| **Taken by Other** | The total number of chats assigned to the agent but taken by another agent during the selected time period. |
| **Agent Exited** | The total number of chats assigned to the agent but not taken due to the agent exiting while the chat was assigned. |
| **Customer Exited** | The total number of chats assigned to the agent but not taken due to the customer exiting while the chat was assigned. |

## Mail Activity

This report is a comprehensive summary of agent mail activity within your company account for a selected time period. Reports are available to provide specific customer mail message information and daily and hourly breakdowns of mail activity.



**Agent Mail Activity Summary**
Times are in the format (hour:min:sec)
*From: 09-01-2008 12:00 AM to 10-14-2008 2:00 PM GMT-07:00 PDT*

| | Mail Summary |
|---|---|
| Total Hours Online: | 132:14:42 |
| Total Taken: | 104 |
| Total Answered: | 6 |
| Total Originated: | 1 |
| Total Forwarded: | 50 |
| Total Forwarded To: | 0 |
| Total Removals: | 5 |
| Total Recoveries: | 4 |
| Total Purged: | 6 |
| Total Archived: | 15 |
| Total Returned to Queue: | 92 |
| Total Marked For Follow-Up: | 3 |
| Total Cancelled Follow-Up: | 1 |
| Avg per hour: | 0.05 |
| Total Session Time: | 38:12:49 (1.59 days) |
| Total Sessions: | 109 |
| Avg Session Time: | 0:21:02 |

Links are available to detailed reports for:

- Agent Login Times
- Agent Mail Answered Activity
- Agent Mail Originated Activity
- Agent Mail Forwarded Activity
- Agent Mail Removal Activity
- Agent Mail Purged Activity
- Agent Mail Archived Activity
- Agent Mail Returned Activity
- Agent Daily Mail Activity Summary (from the **View Daily Mail** icon)

| Agent | Hours Online | Taken | Answered | Originated | Forwarded | Forwarded To |
|---|---|---|---|---|---|---|
| | 0:05:35 | 1 | 0 | 0 | 0 | 0 |
| InstantService Support (is support) | 0:00:00 | 0 | 0 | 0 | 0 | 0 |
| jay sandal (jsandal) | 0:00:00 | 0 | 0 | 0 | 0 | 0 |
| jim corbett (jcorbett) | 0:00:00 | 0 | 0 | 0 | 0 | 0 |
| jim walsh (jwalsh) | 0:00:00 | 0 | 0 | 0 | 0 | 0 |
| | 0:00:00 | 0 | 0 | 0 | 0 | 0 |
| Mario Aquilino (bpaulson) | 9:36:12 | 33 | 1 | 0 | 0 | 0 |
| | 0:00:00 | 0 | 0 | 0 | 0 | 0 |
| Testy Tester (testyt) | 0:00:00 | 0 | 0 | 0 | 0 | 0 |
| **Totals & Averages** | **9:41:48** | **34** | **1** | **0** | **0** | **0** |

| Removals | Recoveries | Purged | Archived | Returned to Queue | Marked For Follow-Up | Cancelled Follow-Up | Avg. per hour | Session Time | Sessions | Avg. Session Time | View Daily Mail |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 0 | 0 | 0 | 0 | 1 | 0 | 0 | 0 | 0:01:41 | 1 | 0:01:41 | |
| 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0:00:00 | 0 | 0:00:00 | |
| 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0:00:00 | 0 | 0:00:00 | |
| 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0:00:00 | 0 | 0:00:00 | |
| 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0:00:00 | 0 | 0:00:00 | |
| 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0:00:00 | 0 | 0:00:00 | |
| 0 | 0 | 1 | 10 | 31 | 0 | 0 | 0.1 | 17:50:10 | 33 | 0:32:26 | |
| 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0:00:00 | 0 | 0:00:00 | |
| 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0:00:00 | 0 | 0:00:00 | |
| **0** | **0** | **1** | **10** | **32** | **0** | **0** | **0.1** | **17:51:51** | **34** | **0:31:32** | |

**Agent Login Times**
Times are in the format (hour:min:sec)
*From: 09-10-2008 10:00 AM to 10-01-2008 12:00 AM GMT-07:00 PDT*

| Login Time | Logout Time | Hours Online |
|---|---|---|
| **09-10-2008 09:52:52 AM GMT-07:00 PDT** | 09-10-2008 11:05:11 AM GMT-07:00 PDT | 1:05:10 **(1:12:18)** |
| 09-16-2008 02:15:27 PM GMT-07:00 PDT | 09-16-2008 02:19:25 PM GMT-07:00 PDT | 0:03:57 |
| 09-23-2008 01:58:27 PM GMT-07:00 PDT | 09-23-2008 02:00:13 PM GMT-07:00 PDT | 0:01:46 |
| 09-30-2008 02:41:10 PM GMT-07:00 PDT | 09-30-2008 02:46:40 PM GMT-07:00 PDT | 0:05:30 |
| 09-30-2008 03:22:27 PM GMT-07:00 PDT | 09-30-2008 03:25:46 PM GMT-07:00 PDT | 0:03:19 |

## Top Summary Section

| Item | Definition |
|---|---|
| **Hours Online** | The number of hours/minutes the agent was logged into the Agent Console during the specified time period. This is independent of the agents' disposition (Available or Unavailable) while logged in.<br><br>**Note:** The Hours Online total does not necessarily reflect the total hours an agent spends online if he or she has logged in or out outside the reporting time period.<br><br>For example, a reporting time period is from 12 AM, October 1st to 12 AM, October 2nd. Agent X logged in at 8 PM, September 30th and logged out at 6 AM, October 1st. The Hours Online total only includes the six (6) hours from 12 AM to 6 AM since these fell within the reporting time period.<br><br>Login and logout times **appearing in red** indicate that the agent logged in or logged out outside of the specified time period. In these instances, the agent's **total** session time is shown next to the Hours Online time. See the previous graphic for an example. |

| Item | Definition |
|---|---|
| **Taken** | The number of messages taken from the Mail Queue by the selected agent during the specified time period. |
| **Answered** | The number of all mail messages answered by the selected agents either via a single or multiple replies during the specified time period. Answered mail messages are only counted if they are a response to incoming mail messages; newly originating mail messages are not counted in this calculation. |
| **Originated** | The number of mail messages originated by an agent during the selected time period. Originated messages are only counted if they are created by the agent and are not a response to an incoming mail message. |
| **Forwarded** | The number of messages forwarded by an agent in queue or in session to either another agent or department during the selected time period. |
| **Forwarded To** | The number of messages forwarded in session to the agent from another agent or department.<br><br>**Note:** Forward counts are session based. It is possible for the same mail message to be forwarded more than once by an agent. |
| **Removals** | The number of times mail messages were removed from a mail queue by selected agents during the specified time period. A mail message can be removed by an agent directly from the queue or removed during a mail session.<br><br>**Note:** Total removal counts are session-based; it is possible for the same message to be removed more than once. For instance, if an agent removes a mail message from the queue and a supervisor recovers that message, the agent is able to view and remove the message again. This instance would tally two removals for the agent. |
| **Recoveries** | The number of times mail messages were recovered in the Agent Console by selected agents during the specified time period.<br><br>**Note:** Total recovery counts are session-based; it is possible for the same message to be recovered more than once. For instance, if an agent recovers a mail message from the Mail Queue and a supervisor removes that message, the agent is able to view and recover the message again. This instance would tally two recoveries for the agent. |
| **Purged** | The number of mail messages purged by the selected agents during the specified time period. A mail message can be purged directly from the queue or during a mail session. |

| Item | Definition |
|---|---|
| **Archived** | The number of mail messages archived by the selected agents during the specified time period. A mail message can be archived directly from the queue or during a mail session. |
| **Returned to Queue** | The number of times mail messages are returned to a department Mail Queue by the selected agents during the specified time period. A mail message can be returned to the queue from a mail session by an agent or by the mail system if an agent disconnects while the message is open in session. |
| **Marked for Follow-Up** | The number of messages marked for follow-up by the selected agents during the specified time period. |
| **Cancelled Follow-up** | The number of times an agent cancelled a follow-up mail session during the specified time period. This action removes the mail message from the follow-up queue without responding to it. |
| **Avg. Per Hour** | The average number of mail messages answered per hour by an agent during the selected time period. This includes single reply messages, multiple reply messages, and messages answered and marked for follow-up. This is calculated by taking the total number of mail messages answered and dividing by the number of hours the agent was online. |
| **Session Time** | The total session time of all completed mail sessions for the selected agents during the specified time period. By definition, the session time is the difference between when a mail session started and when it completed. A mail session starts when an agent takes it from a mail queue, or a mail message is forwarded in session from one agent to another. A mail session completes when it is answered, removed, purged, forwarded, archived, follow-up cancelled, or returned in session. |
| **Sessions** | The total number of completed mail sessions by the selected agents during the specified time period. A mail session completes when it is answered, removed, purged, forwarded, archived, follow-up cancelled, or returned in session. |
| **Avg. Session Time** | The average session time of all completed mail sessions for the selected agents during the specified time period. This is calculated by taking the total session time for each mail session completed during the specified time period, and dividing by the number of completed sessions. |

## Details Section

| Item | Definition |
|---|---|
| **Agent** | The name and username of the selected agent. |
| **Hours Online** | The amount of time the agent spent logged into the Agent Console during the specified time period, regardless of disposition. |
| **Taken** | The number of messages taken from the Mail Queue by the agent during the specified time period. |

| Item | Definition |
|---|---|
| **Answered** | The number of messages answered by the agent during the specified time period. This includes single replies, multiple replies, and replies to messages marked for follow-up.<br>Agent-originated messages are not included in this count. |
| **Originated** | The number of mail messages originated by the agent during the specified time period. |
| **Forwarded** | The number of messages forwarded by the agent during the specified time period. This includes messages forwarded while in queue and messages forwarded while in session. |
| **Forwarded to** | The number of messages forwarded to the agent in session during the specified time period. |
| **Removals** | The number of times mail messages were removed by the agent during the specified time period. This includes messaged removed in queue and messages removed in session.<br>If a mail message is removed, recovered, and removed again, it is counted as two towards the Total Removals count. |
| **Recoveries** | The number of times mail messages were recovered by the agent during the specified time period. |
| **Purged** | The number of messages purged by the agent during the specified time period. This includes messages purged in queue and messages purged in session. |
| **Archived** | The number of messages archived by the agent during the specified time period. This includes messages archived in queue and messages archived in session. |
| **Returned to Queue** | The number of times mail messages were returned to the queue by the agent during the specified time period. This includes messages returned to the queue by the mail system and messages returned by agents.<br>The same message can be counted as returned to queue more than once if it is repeatedly taken and returned. |
| **Marked for Follow-Up** | The number of messages marked for follow-up by the agent during the specified time period. |
| **Cancelled Follow-Up** | The number of times the agent cancelled a follow-up mail session during the specified time period. This action removes the mail message from the follow-up queue without responding to it. |
| **Avg. Per Hour** | The average number of mail messages the agent handled each hour during the specified time period. This includes single reply messages, multiple reply messages, and messages answered and marked for follow-up.<br>This number is calculated by taking the total number of mail messages answered by the selected agents and dividing by the total number of hours they were online. |

| Item | Definition |
|---|---|
| **Session Time** | The total session time of all completed mail sessions for the selected agent during the specified time period. By definition, the session time is the difference between when a mail session started and when it completed.<br>A mail session starts when the agent takes it from a mail queue, or the mail message is forwarded in session from one agent to another. The mail session completes when it is answered, removed, purged, forwarded, archived, follow-up cancelled, or returned in session. |
| **Sessions** | The total number of completed mail sessions for the selected agents during the specified time period. A mail session is completed when it is answered, removed, purged, forwarded, archived, or returned in session. |
| **Avg. Session Time** | The average session time for all completed mail sessions by the selected agent during the specified time period.<br>This number is reached by calculating the amount of time elapsed between the beginning and end of each mail session completed by the selected agent. The resulting times are then added together and divided by the number of completed mail sessions. |
| **View Daily Mail** | A summary of mail activity broken down by day. |

## Detail Reports

Click the statistical links in the report columns to view detail reports. These reports provide more comprehensive information on many of the report columns described previously. use

| Item | Definition |
|---|---|
| **Agent Login Times Report** | |
| **Login Time** | The time the agent logged into the Agent Console. |
| **Logout Time** | The time the agent logged out of the Agent Console. |
| **Hours Online** | The time the agent was logged into the queue during the specified time period. For more information, see the Mail Activity Report Hours Online note. |
| **Agent Mail Answered Activity Report** | |
| **Message ID** | The unique, system-generated message ID number. |
| **Incident Number** | The incident tracking number, which can be used to associate a specific mail message with other chats and emails. |
| **Sender** | The address of the agent who sent the e-mail message. |
| **Department** | The department to which the message was assigned. |
| **Time Received** | The date and time the mail message first entered the system. |
| **Time Answered** | The date and time the mail message was last answered. |
| **Response Time** | The time between when the mail message first entered the system and when it was last responded to. |
| **Session Time** | The time the agent spent in session with the message. |

| Item | Definition |
|---|---|
| **Number of Sessions** | The number of times the agent was in session with the message. |
| **Agent** | The name and username of the agent who last handled the message. |
| **Disposition** | The last action taken with the message. |
| **View Reply** | View the message sent to the customer. |
| **View Path** | View information pertaining to the historical path of activities associated with the message. |
| **Agent Mail Originated Activity Report** | |
| **Message ID** | The message ID number. |
| **Incident Number** | The incident tracking number. |
| **Recipient** | The person to whom the message was sent, typically a customer; this shows the To address only. |
| **Department** | The department from which the message originated. |
| **Subject** | The subject of the message. |
| **Time Sent** | The time when the message was sent. |
| **Agent** | The name and username of the agent who sent the message. |
| **Disposition** | The last action taken with the message. |
| **Agent Mail Forward Activity Report** | |
| **Message ID** | The message ID number. |
| **Incident Number** | The incident tracking number. |
| **Sender** | The address of the person who sent the mail message. |
| **Source Department** | The department from which the message was forwarded. |
| **Time Received** | The date and time the mail message first entered the system. |
| **Time Forwarded** | The date and time the message was forwarded. |
| **Session Time** | The time the agent spent in session with the message. |
| **Number of Sessions** | The number of times the agent was in session with the message. |
| **Agent** | The name and username of the agent who forwarded the message. |
| **Disposition** | The last action taken with the message. |
| **View Path** | View information pertaining to the historical path of activities associated with the message. |
| **Agent Mail Removal Activity Report** | |
| **Message ID** | The message ID number. |
| **Department** | The department from which the message was removed. |
| **Time Received** | The date and time the mail message first entered the system. |
| **Time Removed** | The date and time the message was removed from the department Mail Queue. |
| **Session Time** | The time the agent spent in session with the message. |
| **Number of Sessions** | The number of times the agent was in session with the message. |

| Item | Definition |
|---|---|
| **Agent** | The name and username of the agent who removed the message. |
| **Disposition** | The last action taken with the message. |
| **View Path** | View information pertaining to the historical path of activities associated with the message. |
| **Agent Mail Purged Activity Report** | |
| **Message ID** | The message ID number. |
| **Department** | The department from which the message was purged. |
| **Time Received** | The date and time the mail message first entered the system. |
| **Time Purged** | The date and time the message was purged from the department Mail Queue. |
| **Session Time** | The time the agent spent in session with the message. |
| **Number of Sessions** | The number of times the agent was in session with the message. |
| **Agent** | The name and username of the agent who purged the message. |
| **Disposition** | The last action taken with the message. |
| **View Path** | View information pertaining to the historical path of activities associated with the message. |
| **Agent Mail Archived Activity Report** | |
| **Message ID** | The message ID number. |
| **Department** | The department from which the message was archived. |
| **Time Received** | The date and time the mail message first entered the system. |
| **Time Archived** | The date and time the message was archived. |
| **Session Time** | The time the agent spent in session with the message. |
| **Number of Sessions** | The number of times the agent was in session with the message. |
| **Agent** | The name and username of the agent that archived the message. |
| **Disposition** | The last action taken with the message. |
| **View Path** | View information pertaining to the historical path of activities associated with the message. |
| **Agent Daily Mail Activity Summary Report** | |
| **Agent** | The name and username of the agent. |
| **Date** | Mail activity is organized by date. |
| **Hours Online** | The amount of time the agent was logged into the Agent Console during the specified time period. |
| **Taken** | The number of messages taken from the Mail Queue during the selected time period. |
| **Answered** | The number of messages created by the agent during the specified time period. |
| **Originated** | The number of messages that originated at the agent during the specified time period. |

| Item | Definition |
|---|---|
| **Forwarded** | The number of messages forwarded by the agent during the specified time period. |
| **Forwarded To** | The number of messages forwarded to the agent during the specified time period. |
| **Removals** | The number of messages removed by the agent during the specified time period. |
| **Recoveries** | The number of messages recovered by the agent during the specified time period. |
| **Purged** | The number of messaged purged by the agent during the specified time period. |
| **Archived** | The number of messaged archived by the agent during the specified time period. |
| **Returned to Queue** | The number of messages returned to the Mail Queue by the agent during the specified time period. This includes messages returned to the Mail Queue by the mail system and messages returned by agents. The same message can be counted as returned to the Mail Queue more than once if it is repeatedly removed and returned. |
| **Marked for Follow-Up** | The number of messages marked for follow-up by the agent during the specified time period. |
| **Cancelled for Follow-Up** | The number of follow-up messages the agent cancelled from follow-up during the specified time period. |
| **Avg. Per Hour** | The average number of messages the agent handled each hour during the specified time period, calculated by **(the number of messages handled)** divided by **(the number of hours the agent was online)**. |
| **Session Time** | The amount of time spent in mail sessions by the selected agent during the specified time period. |
| **Sessions** | The number of sessions handled by the selected agent during the specified time period. |
| **Avg. Session Time** | The average time the agent spent in each session during the specified time period, calculated by **(the amount of time in session)** divided by **(the number of sessions)**. |
| **View Hourly Mail** | A summary of messages handled by the agent, broken down by hour. |
| **Agent Hourly Mail Activity Summary Report** | |
| **Agent** | The name and username of the agent. |
| **Hour Starting At** | The hour to which the row of data corresponds. |
| **Taken** | The number of messages taken from the Mail Queue during the hours shown. Numbers for mail taken are session-based, so the comparison between mail taken and mail answered may not be exact. A mail message can be taken from and returned to the Mail Queue multiple times before it is answered. |

| Item | Definition |
|---|---|
| **Answered** | The number of messages answered by the agent during the hours shown. Numbers for mail answered are session-based, so the comparison between mail taken and mail answered may not be exact. A mail message can be taken from and returned to the Mail Queue multiple times before it is answered. |
| **Originated** | The number of messages that originated by the agent during the hours shown. |
| **Forwarded** | The number of messages forwarded by the agent during the hours shown. |
| **Forwarded To** | The number of messages forwarded to the agent during the hours shown. |
| **Removals** | The number of messages removed by the agent during the hours shown. |
| **Recoveries** | The number of messages recovered by the agent during the hours shown. |
| **Purged** | The number of messaged purged by the agent during the hours shown. |
| **Archived** | The number of messaged archived by the agent during the hours shown. |
| **Returned to Queue** | The number of messages returned to the Mail Queue by the agent during the hours shown. This includes messages returned to the Mail Queue by the mail system and messages returned by agents. The same message can be counted as returned to the Mail Queue more than once if it is repeatedly removed and returned. |
| **Marked for Follow-Up** | The number of messages marked for follow-up by the agent during the hours shown. |
| **Cancelled for Follow-Up** | The number of follow-up messages the agent cancelled from follow-up during the specified time period. |
| **Avg. Per Hour** | The average number of messages the agent handled each hour during the specified time period, calculated by **(the number of messages handled)** divided by **(the number of hours the agent was online)**. |
| **Session Time** | The amount of time spent in mail sessions by the agent during the hours shown. |
| **Sessions** | The number of sessions handled by the agent during the hours shown. |
| **Avg. Session Time** | The average time the agent spent in each session during the specified time period, calculated by **(the amount of time in session)** divided by **(the number of sessions)**. |

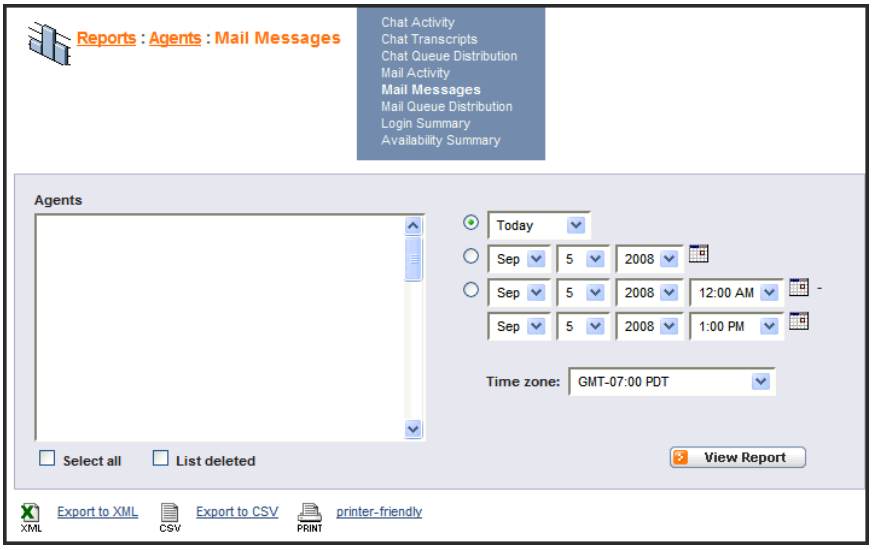
## Dispositions

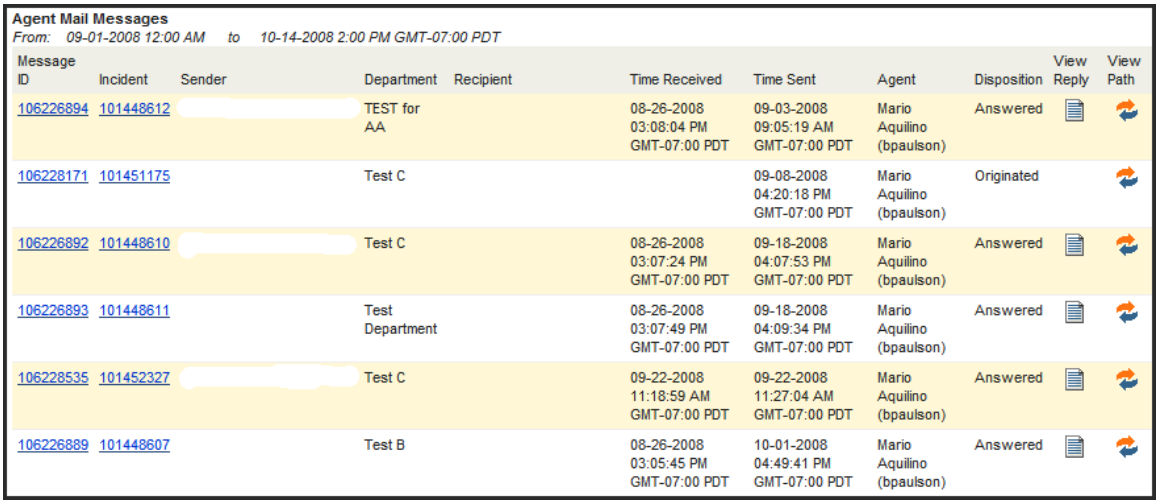
The following dispositions are found in the **Agent Mail Activity Report**:

| Disposition | Definition |
|---|---|
| **Removed in Queue** | An agent removed the mail message directly from the Mail Queue. |
| **Removed in Session** | An agent removed the mail message from within the mail session panel after he or she had taken the message from the Mail Queue. |
| **Purged in Queue** | An agent purged the mail message directly from the Mail Queue. |
| **Purged in Session** | An agent purged the mail message from within the mail session panel after he or she had taken the message from the Mail Queue. |
| **Archived in Queue** | An agent archived the mail message directly from the Mail Queue. |
| **Archived in Session** | An agent archived the mail message from within the mail session after he or she had taken the message from the Mail Queue. |
| **Forwarded to Agent** | An agent forwarded the mail message to a different agent. |
| **Forwarded to Department** | An agent forwarded the mail message to either the same department queue from which it was taken or a new department. |
| **Answered** | An agent replied to the mail message. |
| **Sent** | An agent originated a mail message that was not a response to an incoming message. |

## Mail Messages

This report lists mail messages answered and originated by the agent and other related details for a selected time period. This report does not include customer mail messages still in the Mail Queue.





**Agent Mail Messages**
*From: 09-01-2008 12:00 AM to 10-14-2008 2:00 PM GMT-07:00 PDT*

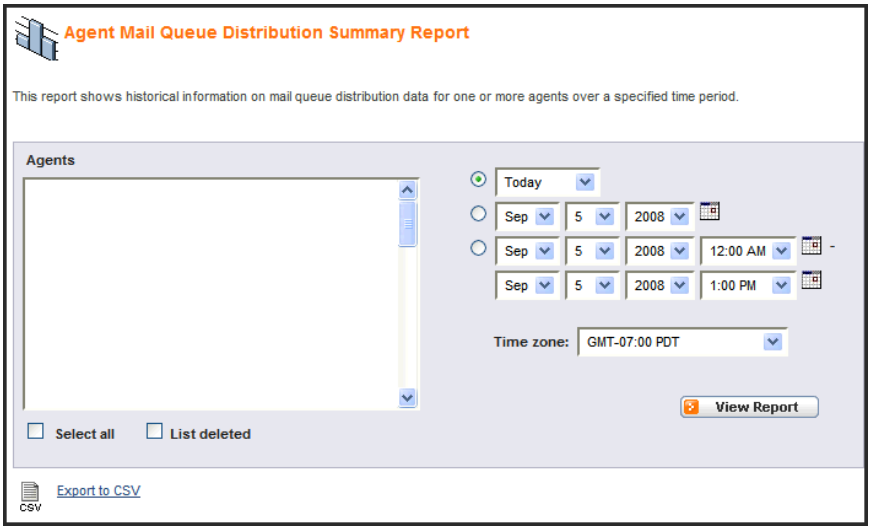
| Message ID | Incident | Sender | Department | Recipient | Time Received | Time Sent | Agent | Disposition | View Reply | View Path |
|---|---|---|---|---|---|---|---|---|---|---|
| 106226894 | 101448612 | | TEST for AA | | 08-26-2008 03:08:04 PM GMT-07:00 PDT | 09-03-2008 09:05:19 AM GMT-07:00 PDT | Mario Aquilino (bpaulson) | Answered | | |
| 106228171 | 101451175 | | Test C | | | 09-08-2008 04:20:18 PM GMT-07:00 PDT | Mario Aquilino (bpaulson) | Originated | | |
| 106226892 | 101448610 | | Test C | | 08-26-2008 03:07:24 PM GMT-07:00 PDT | 09-18-2008 04:07:53 PM GMT-07:00 PDT | Mario Aquilino (bpaulson) | Answered | | |
| 106226893 | 101448611 | | Test Department | | 08-26-2008 03:07:49 PM GMT-07:00 PDT | 09-18-2008 04:09:34 PM GMT-07:00 PDT | Mario Aquilino (bpaulson) | Answered | | |
| 106228535 | 101452327 | | Test C | | 09-22-2008 11:18:59 AM GMT-07:00 PDT | 09-22-2008 11:27:04 AM GMT-07:00 PDT | Mario Aquilino (bpaulson) | Answered | | |
| 106226889 | 101448607 | | Test B | | 08-26-2008 03:05:45 PM GMT-07:00 PDT | 10-01-2008 04:49:41 PM GMT-07:00 PDT | Mario Aquilino (bpaulson) | Answered | | |

Links are available to detailed reports for:

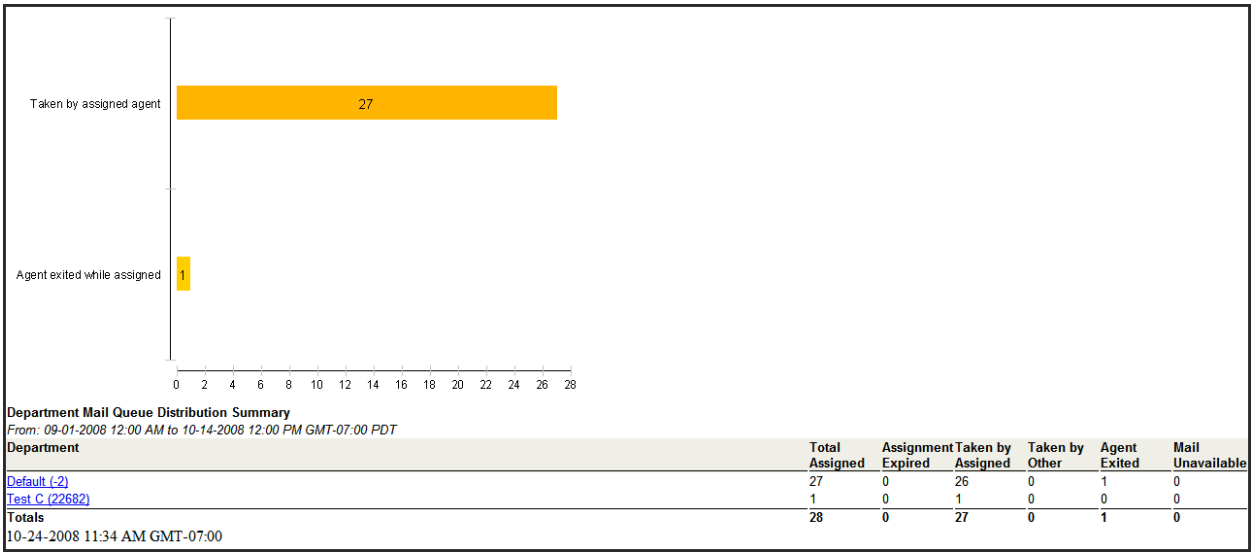
- Mail Message (from Message ID and the **View Reply** icon)
- Customer Incident
- Email Address History
- Mail Message History Detail (from the **View Path** icon)

## Mail Queue Distribution

This report shows historical information on Mail Queue distribution for your agents during a selected time period. The statistics shown summarize the different types of events that are recorded for queue distribution assigned items.




**Note:** This report performs differently from other reports by opening in its own separate browser window and lacks the additional navigational links at the top of the page.




Links are available to the Agent Mail Queue Distribution Details report.

For agents with valid data for the selected time period, a detail report is available which provides comprehensive information on agent assigned mail messages. This detail report lists the department into which each mail message entered, the time each message was assigned to the particular agent, and the time and type of the event that occurred.

The events recorded for Mail Queue distribution are:

- Total Assigned
- Assignment expired
- Taken by Assigned
- Taken by Other (another agent)
- Agent Exited (while item was assigned)
- Mail Unavailable

**Note:** If an agent is available and the end time for the report is in the future, the Hours Available statistic reflects how long the agent has been available up until the time when the report ran.

## Statistics

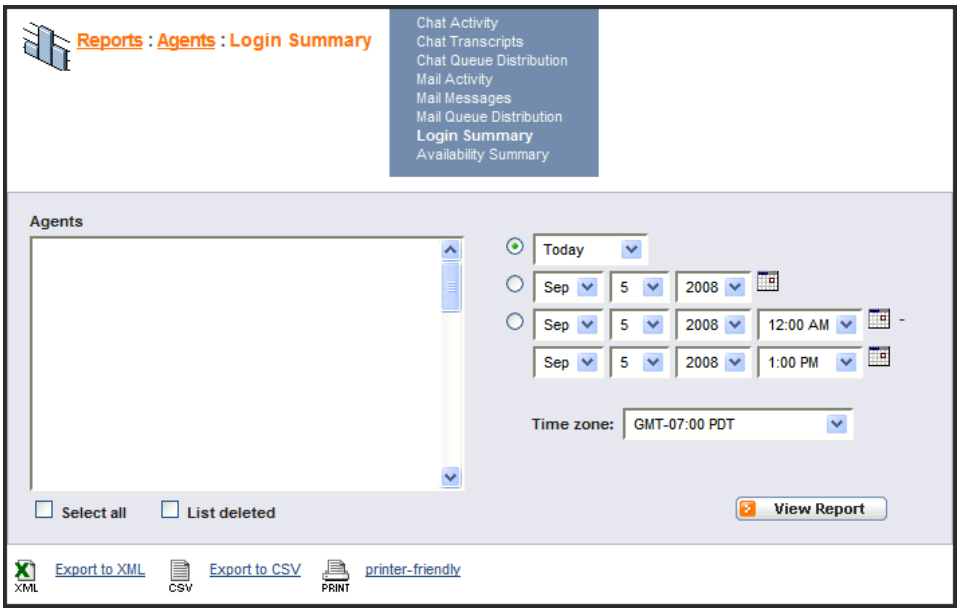
The following statistics are provided on the Agent Mail Queue Distribution Summary Report for each selected agent:

| Disposition | Definition |
|---|---|
| **Hours Available** | The number of hours/minutes the agent was logged into the Agent Console and was available to take mail messages during the selected time period. |
| **Total Assigned** | The total number of Mail Queue distribution events that occurred for the agent during the selected time period. |

| Disposition | Definition |
|---|---|
| **Assignment Expired** | The total number of mail messages assigned to the agent and were not taken before the assignment timeout is exceeded, during the selected time period.<br>For more information, under Automatic Queue Distribution, see Assignment Timeout. |
| **Taken by Assigned** | The total number of mail messages that were assigned to the agent and were taken during the selected time period. |
| **Taken by Other** | The total number of mail messages assigned to the agent but taken by another agent during the selected time period. |
| **Agent Exited** | The total number of mail messages assigned to the agent that were not taken due to the agent exiting the Agent Console while the message was assigned. |
| **Mail No Longer Available** | The total number of mail messages that were first assigned to the agent but became available, because the message had been removed, purged, archived, or forwarded to another department. |

## Agent Login Summary Report

This report allows you to view the login and logout times of all of your agents during a selected time period. It also calculates the total number of hours each agent was online during the same period.




Login and logout times shown in red indicate that the agent logged in or logged out outside of the selected time period. In these instances, the Hours Online column displays the time the agent was logged in during the selected time period, while the total hours online for that logged in session are displayed next to it in red.

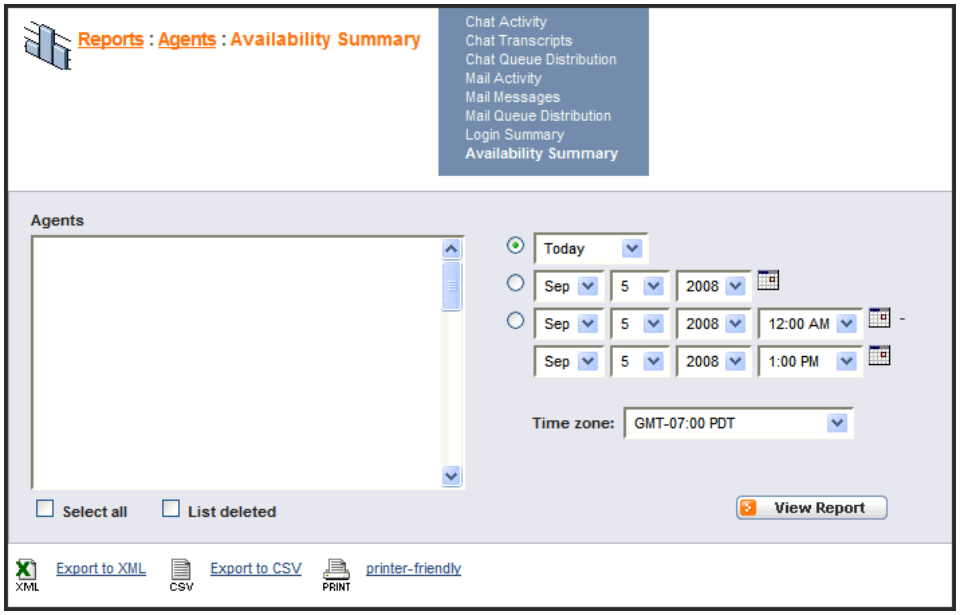
Since the Agent Login Summary Report is historical in nature, it does not include any currently logged in agents.

**Agent Login Summary**
Times are in the format (hour:min:sec)
*From: 09-01-2008 12:00 AM to 10-14-2008 3:00 PM GMT-07:00 PDT*

| Agent | Login Time | Logout Time | Hours Online |
|---|---|---|---|
| | 09-04-2008 08:59:56 AM GMT-07:00 PDT | 09-04-2008 09:17:32 AM GMT-07:00 PDT | 0:17:23 |
| | 09-04-2008 09:18:19 AM GMT-07:00 PDT | 09-04-2008 09:22:19 AM GMT-07:00 PDT | 0:04:12 |
| | 09-04-2008 09:30:30 AM GMT-07:00 PDT | 09-04-2008 10:42:53 AM GMT-07:00 PDT | 1:12:35 |
| | 09-04-2008 10:43:38 AM GMT-07:00 PDT | 09-04-2008 10:48:09 AM GMT-07:00 PDT | 0:04:47 |
| | 09-04-2008 10:49:17 AM GMT-07:00 PDT | 09-04-2008 11:03:06 AM GMT-07:00 PDT | 0:13:48 |
| | 09-04-2008 11:12:45 AM GMT-07:00 PDT | 09-04-2008 01:46:42 PM GMT-07:00 PDT | 2:34:11 |
| | 09-04-2008 02:06:25 PM GMT-07:00 PDT | 09-04-2008 02:38:24 PM GMT-07:00 PDT | 0:31:48 |
| | 09-05-2008 02:28:43 PM GMT-07:00 PDT | 09-05-2008 04:05:32 PM GMT-07:00 PDT | 1:36:36 |

## Availability Summary

This report gives you the ability to view the hours a selected agent has been logged into the Agent Console. The columns show all of the possible states and the amount of time—in hours and minutes—an agent spent in each state.




**Note:** If a report is run with an end time that is in the future, the reported time indicates the time the agent was in each state up until the end time of the report.

For more information, see the section on Availability States.

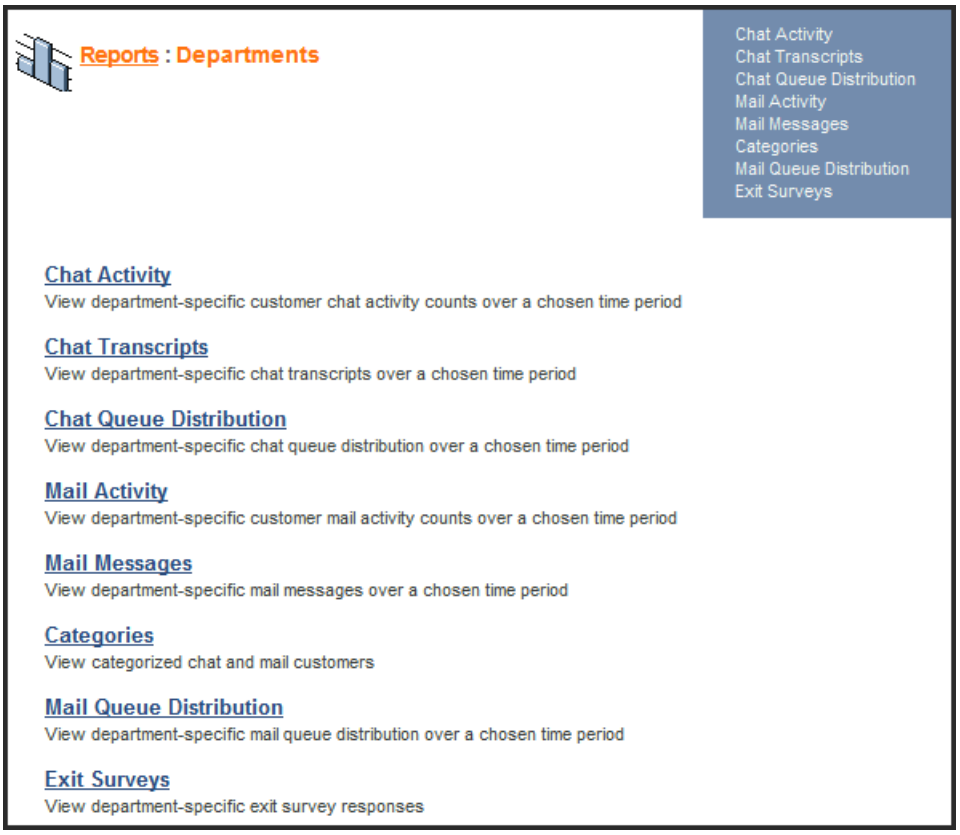
**Availability Summary**
Times are in the format (hour:min:sec)
*From: 09-01-2008 12:00 AM to 10-14-2008 3:00 PM GMT-07:00 PDT*

| Agent | Hours Online | Available | Unavailable (max. chats) | Unavailable (away) | Unavailable (on the phone) | Unavailable (training) | Unavailable (meeting) |
|---|---|---|---|---|---|---|---|
| | 9:08:42 | 9:08:42 | 0:00:00 | 0:00:00 | 0:00:00 | 0:00:00 | 0:00:00 |
| InstantService Support (is support) | 0:00:00 | 0:00:00 | 0:00:00 | 0:00:00 | 0:00:00 | 0:00:00 | 0:00:00 |
| jay sandal (jsandal) | 15:25:34 | 11:51:38 | 0:00:00 | 3:33:56 | 0:00:00 | 0:00:00 | 0:00:00 |
| jim corbett (jcorbett) | 10:48:55 | 10:48:55 | 0:00:00 | 0:00:00 | 0:00:00 | 0:00:00 | 0:00:00 |
| jim walsh (jwalsh) | 0:09:31 | 0:09:31 | 0:00:00 | 0:00:00 | 0:00:00 | 0:00:00 | 0:00:00 |
| Lyte Paulson | 1:43:50 | 0:00:00 | 0:00:00 | 1:43:50 | 0:00:00 | 0:00:00 | 0:00:00 |
| Mario Aquilino | 86:47:08 | 86:31:11 | 0:07:01 | 0:08:55 | 0:00:00 | 0:00:00 | 0:00:00 |
| | 0:00:00 | 0:00:00 | 0:00:00 | 0:00:00 | 0:00:00 | 0:00:00 | 0:00:00 |
| Testy Tester (testyt) | 8:12:31 | 5:52:59 | 0:00:00 | 2:19:32 | 0:00:00 | 0:00:00 | 0:00:00 |
| **Totals** | **132:16:13** | **124:22:58** | **0:07:01** | **7:46:13** | **0:00:00** | **0:00:00** | **0:00:00** |

The links in the Hours Online column present detailed reports for Availability Details.

## Departments

These reports are summaries of department activity within your company account for a selected time period.




**Note:** You may run reports for one or more departments up to a maximum of 1000. If there are over 1000 departments, the number of currently selected departments are displayed and updated as a user selects/de-selects departments from the list. You can also choose to display deleted departments. These departments are visually differentiated from non-deleted departments in the selection list.

## Running Department Reports

Use the following procedure when running Department reports.

### To run a department report:

1. From the Departments list, select the department or departments for which you want to run a report.

   **Note:** Use the key combinations **Shift+Click** or **Ctrl+Click** to select multiple departments. To select all departments from the list, click the **Select All** check box.

   To include deleted departments, select the **List Deleted** check box.

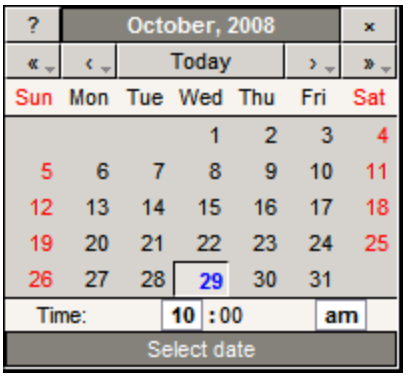
2. Choose one of the following for your report:
   - A pre-defined range option, which include:
     - Today
     - Yesterday
     - This Week
     - Last Week
     - This Month
     - Last Month
   - A specific day

   **Note:** The calendar associated with selecting a specific day has a date selector but no time selection. For more details on using the **Date/Time Selector**, see the next note.

   - A specific date range

   To choose the specific day or date range, do one of the following:

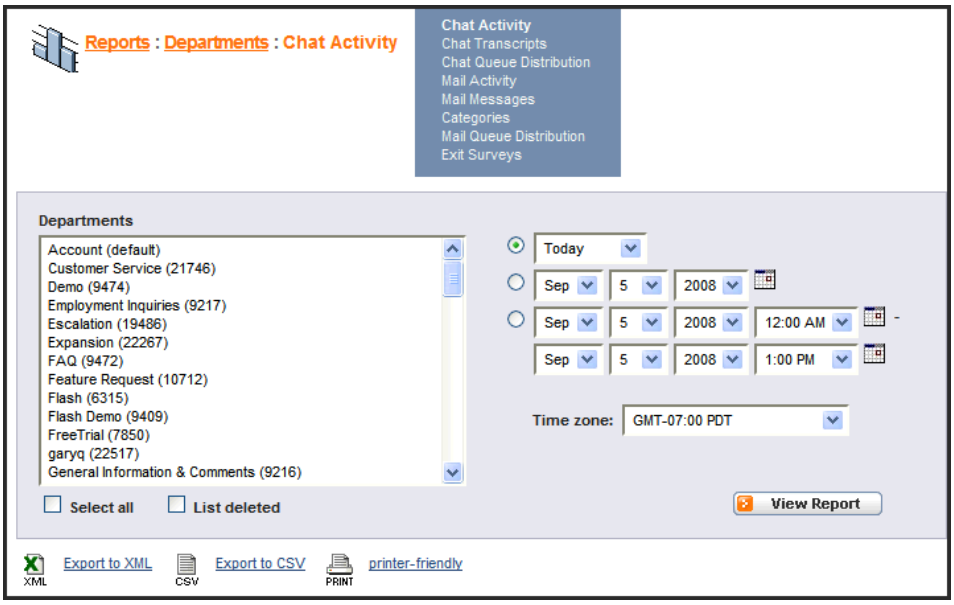
   - Use the menus to select month, day, year, and time.
   - Click the  icon. The Date/Time Selector calendar appears with today's date as the default.




- Click « to view the previous year or » for the next year.
- Click ‹ to view the previous month or › for the next month.
- In the Time section, click and drag the hour box and the AM/PM box to make changes. This is not available when selecting only a specific date rather than date range.
- Click a day or × in the upper right corner to close the calendar and populate the corresponding date and time fields with the date and time that you selected in the calendar.

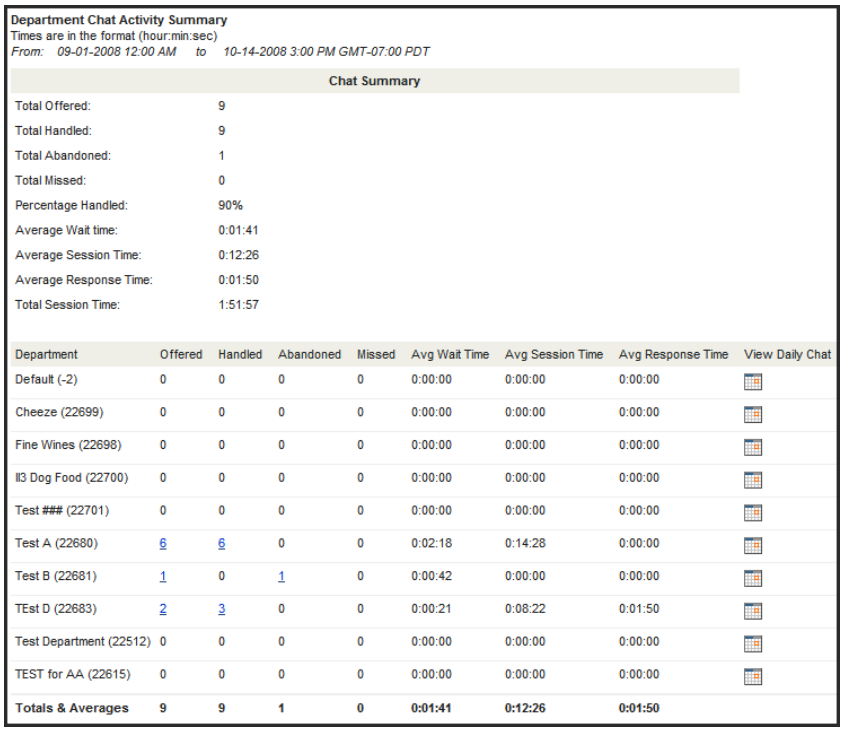
3. Accept the time zone based on your system clock, or choose a time zone.
4. Do one of the following:
   - Click **View Report** to produce the HTML version of the report.
   - Click the output format you want to produce:
     - Export to XML
     - Export to CSV
     - Printer-Friendly.

## Chat Activity




Links are available to detailed reports for:

- Department Chats Offered Activity
- Department Chats Handled Activity
- Department Chats Abandoned Activity
- Department Chats Missed Activity
- Department Daily Chat Activity Summary (from the **View Daily Chat** icon)



**Department Chat Activity Summary**
Times are in the format (hour:min:sec)
*From: 09-01-2008 12:00 AM to 10-14-2008 3:00 PM GMT-07:00 PDT*

| Chat Summary | |
|---|---|
| Total Offered: | 9 |
| Total Handled: | 9 |
| Total Abandoned: | 1 |
| Total Missed: | 0 |
| Percentage Handled: | 90% |
| Average Wait time: | 0:01:41 |
| Average Session Time: | 0:12:26 |
| Average Response Time: | 0:01:50 |
| Total Session Time: | 1:51:57 |

| Department | Offered | Handled | Abandoned | Missed | Avg Wait Time | Avg Session Time | Avg Response Time | View Daily Chat |
|---|---|---|---|---|---|---|---|---|
| Default (-2) | 0 | 0 | 0 | 0 | 0:00:00 | 0:00:00 | 0:00:00 | |
| Cheeze (22699) | 0 | 0 | 0 | 0 | 0:00:00 | 0:00:00 | 0:00:00 | |
| Fine Wines (22698) | 0 | 0 | 0 | 0 | 0:00:00 | 0:00:00 | 0:00:00 | |
| ll3 Dog Food (22700) | 0 | 0 | 0 | 0 | 0:00:00 | 0:00:00 | 0:00:00 | |
| Test ### (22701) | 0 | 0 | 0 | 0 | 0:00:00 | 0:00:00 | 0:00:00 | |
| Test A (22680) | 6 | 6 | 0 | 0 | 0:02:18 | 0:14:28 | 0:00:00 | |
| Test B (22681) | 1 | 0 | 1 | 0 | 0:00:42 | 0:00:00 | 0:00:00 | |
| TEst D (22683) | 2 | 3 | 0 | 0 | 0:00:21 | 0:08:22 | 0:01:50 | |
| Test Department (22512) | 0 | 0 | 0 | 0 | 0:00:00 | 0:00:00 | 0:00:00 | |
| TEST for AA (22615) | 0 | 0 | 0 | 0 | 0:00:00 | 0:00:00 | 0:00:00 | |
| **Totals & Averages** | **9** | **9** | **1** | **0** | **0:01:41** | **0:12:26** | **0:01:50** | |

The following counts and calculations are provided on the **Department Chat Activity Summary Report**:

| Counts / Calculations | Definition |
|---|---|
| **Chats Offered** | The number of customers who entered the department Chat Queue during the selected time period.<br><br>**Note:** The count for chats offered is session-based. It is possible for the same department to offer a customer more than one chat. |
| **Chats Handled** | The sum of:<br>♦ All chat customers taken from the Chat Queue by an agent whose session ended during the selected time period.<br>♦ All chat customers who were transferred to and accepted by the agent whose session ended during the selected time period.<br><br>**Note:** Handle counts are session-based. It is possible for one customer to be transferred to multiple agents. Each accepted transfer is counted as a chat handled. |
| **Chat Abandoned** | The number of customers that entered that Chat Queue but were never assisted by an agent. |
| **Chats Missed** | The number of customers that attempted to enter chat but were denied access due to the queue being closed or not having any available agents. |
| **Average Chat Wait Time** | The average wait time for customers entering the department's Chat Queue. The wait time for chats never taken is also included in this figure. |
| **Average Chat Session Time** | The average length of all the chats taken from the queue and ended during the selected time period. |
| **Average Response Time** | The average response time for all chats handled by the department during the selected time period. Response Time is defined as the time from when a message is received from a customer to the time when the agent sends a response.<br>To get the average response time, the total response time of all chats is divided by the total number of responses.<br>The following are all considered an agent response:<br>♦ The agent sends a message to the customer.<br>♦ The agent pushes a URL or file to the customer.<br>♦ The agent transfers the customer to a department or agent.<br>♦ The monitoring agent sends a message or pushes a URL or file to the customer.<br>♦ The agent that transferred the customer sends a message or pushes a URL or file to the customer.<br>♦ The customer is dismissed.<br>♦ The customer leaves the session. |

| Counts / Calculations | Definition |
|---|---|
| **Chat Percentage Handled** | The percentage of all chats that were handled. This is calculated using both the chats that came into the queue and chats that were missed or abandoned:<br>(chats handled / (chats handled + chats abandoned + chats missed)). |
| **Total Chat Session Time** | The total session time for all handled chats from the selected departments during the selected time period. |

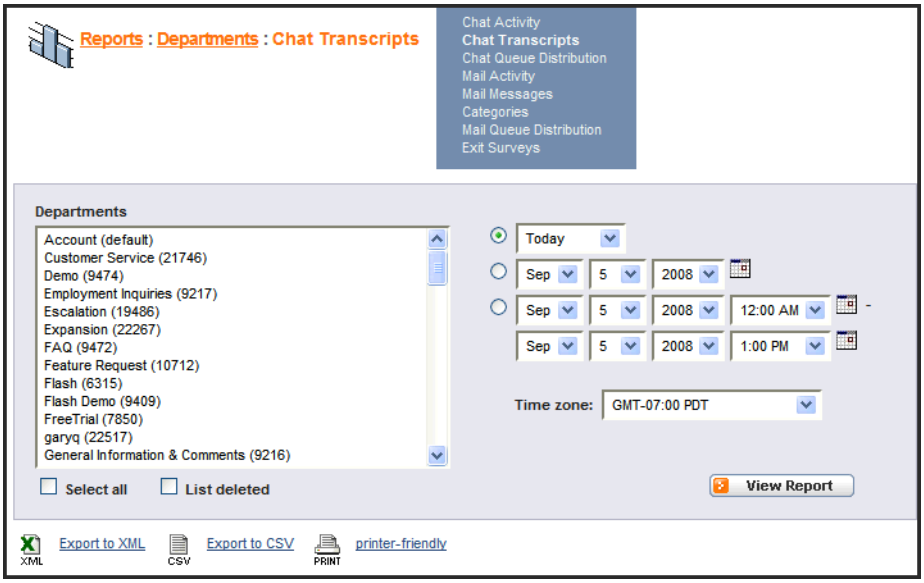
### Dispositions

The following are the various chat dispositions found in the comprehensive details from the **Department Chat Activity Summary Report**:

| Disposition | Definition |
|---|---|
| **Missed** | The customer was not allowed to enter the system because the desired department queue was closed or unavailable. |
| **Abandoned** | The customer entered the Chat Queue for the selected department but was never assisted by an agent. |
| **Completed** | The chat session ended and no other transfers or chat sessions took place. |
| **Customer Left** | An agent transferred a customer back into the department Chat Queue but the customer left before being assisted by another agent. |
| **Transferred to Agent** | The chat customer was transferred between agents, bypassing the Chat Queue. |
| **Transferred to Department** | An agent transferred the chat customer to the same or different department Chat Queue. |

## Chat Transcripts

This report allows you to view transcripts of chats for a selected time period.



**Department Chat Transcripts**
Times are in the format (hour:min:sec)
*From: 09-01-2008 12:00 AM to 10-14-2008 3:00 PM GMT-07:00 PDT*

| Customer ID | Customer | Department | Entered Queue | Wait Time | Agent | Disposition | View Transcript | View Path |
|---|---|---|---|---|---|---|---|---|
| 60017279 | | Test D | 09-04-2008 09:09:11 AM GMT-07:00 PDT | 0:00:20 | | Transferred to Test A | | |
| 60017281 | | Test D | 09-04-2008 09:39:11 AM GMT-07:00 PDT | 0:00:22 | Mario Aquilino | Transferred to | | |
| 60017281 | | Test D | 09-04-2008 09:39:11 AM GMT-07:00 PDT | 0:00:22 | | Completed | | |
| 60018555 | | Test A | 09-04-2008 02:33:02 PM GMT-07:00 PDT | 0:00:34 | Mario Aquilino | Transferred to | | |
| 60018555 | | Test A | 09-04-2008 02:33:02 PM GMT-07:00 PDT | 0:00:34 | | Completed | | |

Links are available to detailed reports for:

- Customer Record
- Chat Transcript (from the **View Transcript** icon)
- Chat Customer History Detail (from the **View Path** icon)

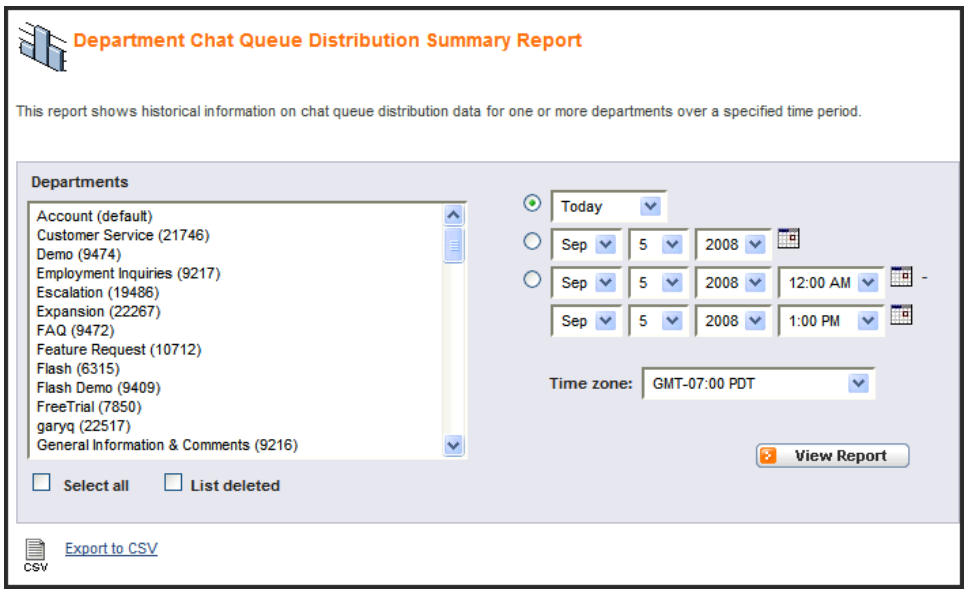
## Dispositions

The following dispositions are provided for the Chat Transcripts section:

| Disposition | Definition |
|---|---|
| **Chat Missed** | The chat request was denied due to a closed queue or no available agents. |
| **Chat Abandoned** | An agent never took the customer out of the queue. |
| **Chat Transferred to Agent** | An agent transferred the customer to a different agent, bypassing the queue. |
| **Chat Transferred to Department** | An agent transferred the customer to the same department from which he or she was taken or to a different department. |
| **Chat Customer Left** | The customer left before being taken by an agent following a transfer to a department. |

## Chat Queue Distribution

This report shows information on Chat Queue distribution for your departments during a selected time period.




**Note:** This report performs differently from other reports by opening in its own separate browser window and lacks the additional navigational links at the top of the page. This is part of the nature of the queue distribution summary report and is normal.

The statistics shown summarize the different types of events recorded for queue distribution assigned items.

For departments with valid data for the selected time period, a detail report is available which provides specific details on that department's assigned chats. This detail report lists the department each chat entered, the time each chat was assigned to the particular agent, and the time and type of the event that occurred.

If there is valid data for the selected time period, a bar graph is displayed in both the top level and detail reports, providing a visual representation of the report data.

The events recorded for Chat Queue distribution are:

- Assignment expired
- Agent took assigned item
- Assignment taken by another agent
- Agent exited while item was assigned
- Customer exited while item was assigned

**Note:** If an agent is available and the end time for the report is in the future, the Hours Available statistic reflects how long the agent has been available up until the time when the report ran.

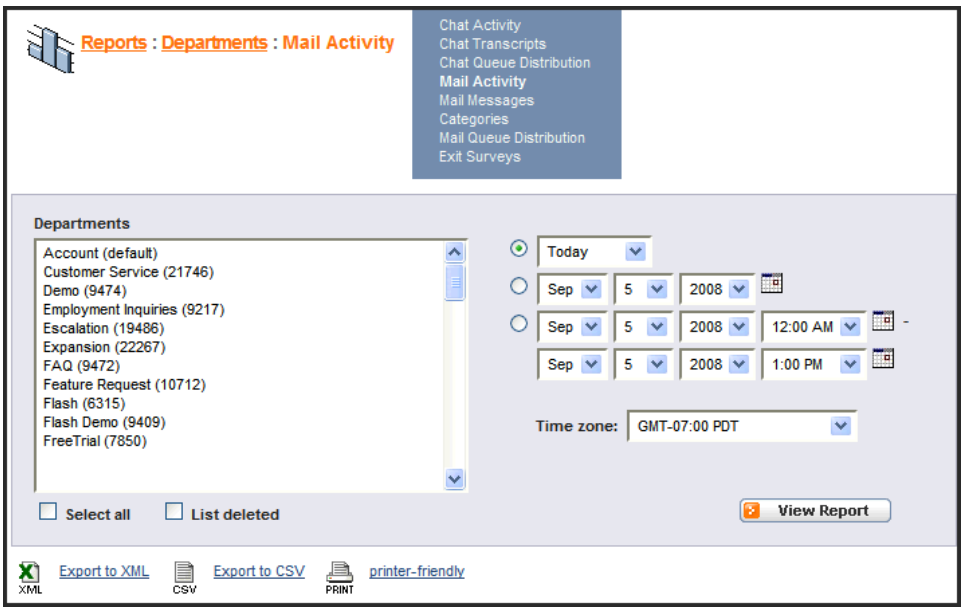
### Statistics

The following statistics are provided on the **Department Chat Queue Distribution Summary Report** for each selected department:

| Disposition | Definition |
|---|---|
| **Total Assigned** | The total number of Chat Queue distribution events that occurred for agents in the department during the selected time period. |
| **Assignment Expired** | The total number of chats that were assigned to an agent in the department and expired during the selected time period. |
| **Taken by Assigned** | The total number of chats that were assigned to an agent in the department and were taken during the selected time period. |
| **Taken by Other** | The total number of chats assigned to an agent in the department but taken by another agent during the selected time period. |
| **Agent Exited** | The total number of chats assigned to an agent in the department that were not taken due to the agent exiting while the chat was assigned. |
| **Customer Exited** | The total number of chats assigned to an agent in the department that were not taken due to the customer exiting while the chat was assigned. |

## Mail Activity

This report is a summary of department mail activity within your company account for a selected time period. Detail reports are available to provide specific customer information and daily and hourly breakdowns of mail activity.



**Department Mail Activity Summary**
Times are in the format (hour:min:sec)
*From: 09-01-2008 12:00 AM to 10-14-2008 3:00 PM GMT-07:00 PDT*

| Mail Summary | |
|---|---|
| Total Received: | 310 |
| Total Routed In: | 6 |
| Total Routed Out: | 1 |
| Total Forwarded In: | 50 |
| Total Forwarded Out: | 50 |
| Total Returned to Queue: | 83 |
| Total Marked For Follow-Up: | 2 |
| Total Cancelled Follow-Up: | 0 |
| Total Answered: | 4 |
| Total Originated: | 0 |
| Total Removals: | 5 |
| Total Recoveries: | 4 |
| Total Purged: | 4 |
| Total Archived: | 6 |
| Average Time in Queue: | 68:29:58 (2.85 days) |
| Average Time in Follow-Up Queue: | 0:05:01 |
| Total Session Time: | 35:08:17 (1.46 days) |
| Total Sessions: | 94 |
| Average Session Time: | 0:22:26 |
| Average Initial Response Time: | 534:54:19 (22.29 days) |
| Average Follow-Up Response Time: | 0:00:24 |

| Department | Received | Routed In | Routed Out | Forwarded In | Forwarded Out | Returned to Queue | Marked For Follow-Up | Cancelled Follow-Up | Answered | Originated | Removals | Recoveries |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Default (-2) | 305 | 1 | 0 | 0 | 50 | 57 | 0 | 0 | 0 | 0 | 1 | 0 |
| Cheeze (22699) | 0 | 3 | 0 | 0 | 0 | 4 | 0 | 0 | 0 | 0 | 0 | 0 |
| Fine Wines (22698) | 0 | 1 | 0 | 0 | 0 | 1 | 0 | 0 | 0 | 0 | 0 | 0 |
| ll3 Dog Food (22700) | 1 | 0 | 0 | 0 | 0 | 2 | 0 | 0 | 0 | 0 | 0 | 0 |
| Test ### (22701) | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Test A (22680) | 3 | 1 | 1 | 50 | 0 | 10 | 0 | 0 | 0 | 0 | 4 | 4 |
| Test B (22681) | 0 | 0 | 0 | 0 | 0 | 1 | 0 | 0 | 1 | 0 | 0 | 0 |
| TEst D (22683) | 0 | 0 | 0 | 0 | 0 | 5 | 0 | 0 | 0 | 0 | 0 | 0 |
| Test Department (22512) | 0 | 0 | 0 | 0 | 0 | 1 | 0 | 0 | 1 | 0 | 0 | 0 |
| TEST for AA (22615) | 1 | 0 | 0 | 0 | 0 | 2 | 2 | 0 | 2 | 0 | 0 | 0 |
| **Totals & Averages** | **310** | **6** | **1** | **50** | **50** | **83** | **2** | **0** | **4** | **0** | **5** | **4** |

| Purged | Archived | Avg Time In Queue | Avg Time In Follow-up Queue | Total Session Time | Total Sessions | Avg Session Time | Avg Initial Response Time | Avg Follow-up Response Time | View Daily Mail |
|---|---|---|---|---|---|---|---|---|---|
| 2 | 1 | 46:51:31 (1.95 days) | 0:00:00 | 10:47:39 | 60 | 0:10:48 | 0:00:00 | 0:00:00 | |
| 0 | 1 | 0:23:24 | 0:00:00 | 0:23:21 | 4 | 0:05:50 | 0:00:00 | 0:00:00 | |
| 0 | 1 | 0:58:57 | 0:00:00 | 0:00:38 | 1 | 0:00:38 | 0:00:00 | 0:00:00 | |
| 0 | 0 | 0:00:51 | 0:00:00 | 0:01:02 | 2 | 0:00:31 | 0:00:00 | 0:00:00 | |
| 0 | 0 | 0:00:00 | 0:00:00 | 0:00:00 | 0 | 0:00:00 | 0:00:00 | 0:00:00 | |
| 2 | 2 | 119:00:21 (4.96 days) | 0:00:09 | 2:34:44 | 12 | 0:12:54 | 0:00:00 | 0:00:00 | |
| 0 | 0 | 432:49:33 (18.03 days) | 0:00:00 | 0:04:51 | 2 | 0:02:26 | 865:43:56 (36.07 days) | 0:00:00 | |
| 0 | 0 | 196:48:58 (8.20 days) | 0:00:00 | 4:52:26 | 5 | 0:58:29 | 0:00:00 | 0:00:00 | |
| 0 | 0 | 251:17:49 (10.47 days) | 0:00:00 | 0:24:22 | 2 | 0:12:11 | 553:01:46 (23.04 days) | 0:00:00 | |
| 0 | 1 | 135:13:36 (5.63 days) | 0:07:27 | 15:59:14 | 6 | 2:39:52 | 185:57:16 (7.75 days) | 0:00:24 | |
| **4** | **6** | **68:29:58 (2.85 days)** | **0:05:01** | **35:08:17 (1.46 days)** | **94** | **0:22:26** | **534:54:19 (22.29 days)** | **0:00:24** | |

Links are available to detailed reports for:

- Department Mail Received Activity
- Department Mail Routed In Activity
- Department Mail Routed Out Activity
- Department Mail Returned Activity
- Department Mail Answered Activity
- Department Mail Originated Activity
- Department Mail Removal Activity
- Department Mail Purged Activity
- Department Mail Archived Activity
- Department Daily Mail Activity Summary (from the **View Daily Mail** icon)

## Top Summary Section

| Item | Definition |
|---|---|
| **Total Received** | The number of mail messages that entered the Mail Queue during the selected time period. The mail can enter the queue either via SMTP or via a Form POST.<br>**Note:** Mail received counts are session based. It is possible for the same mail message to be offered more than once for the same queue. For instance, if an agent takes a message out of the Mail Queue then forwards it to a new department, two offers are tallied. |
| **Total Forwarded Out** | The number of mail messages forwarded out of the selected department mail queues during the selected time period. The mail message could have been forwarded while in the queue or during a mail session. |
| **Total Forwarded In** | The number of mail messages forwarded into the selected department Mail Queues during the specified time period. |
| **Total Routed Out** | The number of messages routed out of the selected department Mail Queue by the mail routing system during the specified time period. |
| **Total Routed In** | The number of mail messages routed into the selected department Mail Queue by the mail routing system during the specified time period. |
| **Total Returned to Queue** | The number of times mail messages were returned to the selected department Mail Queues during the specified time period. A mail can be returned to the queue from a mail session by an agent or by the mail system if an agent disconnects while the mail is opened in session.<br>The same mail message can be counted as returned to queue more than once. |
| **Total Marked for Follow-Up** | The number of mail messages marked for follow-up by an agent during the selected time period. |
| **Total Cancelled Follow-Up** | The number of times an agent cancelled a follow-up mail session. This action removes the mail message from the follow-up queue without responding to it. |
| **Total Answered** | The count of all mail messages answered by an agent via either a single or multiple reply during the selected time period.<br>Answered mail messages are only counted if they are a response to incoming mail messages; newly originating mail messages are not counted in this calculation. |
| **Total Originated** | The number of mail messages originated by an agent during the selected time period. Originated messages are only counted if they are created by an agent and are not a response to an incoming mail message. |

| Item | Definition |
|---|---|
| **Total Removals** | The number of times mail messages were removed from the selected department Mail Queues during the specified time period. A mail message can be removed by an agent directly from the queue or removed during a mail session.<br>If a mail message is removed, recovered, and removed again, it is counted as two towards the Total Removals count.<br>**Note:** Mail removal counts are session based; it is possible for the same message to be removed more than once. For instance, if an agent removes a mail message from the queue and a supervisor recovers that message, the agent will be able to view and remove the message again. This instance would tally two removals for the agent. |
| **Total Recoveries** | The number of times mail messages were recovered by an administrator (or agent with the proper permissions) for the selected department. |
| **Total Purged** | The number of mail messages purged from the selected department Mail Queue during the specified time period. A mail message can be purged by an agent directly from the queue or purged during a mail session. |
| **Total Archived** | The number of mail messages archived from the selected department Mail Queue during the specified time period. A mail message can be archived by an agent directly from the queue or archived during a mail session. |
| **Average Time In Queue** | The average time mail messages spent in the queue during the selected time period.<br>This is calculated by taking the total time spent in queue for mail messages that left the queue during the selected time period, and dividing by the number of messages that left the queue during the selected time period.<br>A message can leave the queue by being taken, removed, purged, forwarded, or archived by either an agent or the mail system. By definition, the time spent in queue is the difference between the time a message entered the queue and the time the message left the queue. |
| **Average Time in Follow-Up Queue** | The average time mail messages spent in the follow-up queue during the selected time period.<br>This average is calculated by taking the total time mail messages that left the follow-up queue during the selected time period spent in the follow-up queue, and dividing by the number of mails that left the follow-up queue during the selected time period.<br>A mail message can leave the follow-up queue by either being taken or forwarded out of the queue by an agent. By definition, the time spent in the follow-up queue is the difference between the time a mail entered the follow-up queue and the time it left. |

| Item | Definition |
|---|---|
| **Total Session Time** | The total session time of all completed mail sessions for the selected departments during the specified time period. By definition, the session time is the difference between when a mail session started and when it completed.<br>A mail session starts when an agent takes it from a mail queue, or a mail is forwarded in session from one agent to another. A mail session completes when it is answered, removed, purged, forwarded, archived, follow-up cancelled, or returned in session. |
| **Total Sessions** | The total number of completed mail sessions for the selected departments during the specified time period. A mail session is completed when it is answered, removed, purged, forwarded, archived, or returned in session. |
| **Average Session Time** | The average session time of all completed mail sessions for the selected departments during the specified time period.<br>This is calculated by taking the total session time for each mail session that completed during the specified time period, and dividing by the number of completed sessions. |
| **Average Initial Response Time** | The average response time for each mail message initially answered in the selected departments during the specified time period.<br>By definition, the initial response time for a mail message is the difference between when the message was received in queue and when it was initially answered by an agent. |
| **Average Follow-Up Response Time** | The average response time for each mail message answered from the selected departments' follow-up queue in during the specified time period.<br>By definition, the follow-up response time is the difference between when a mail was marked for follow-up and when it was answered in a mail session from that follow-up queue. |

## Details Section

| Item | Definition |
|---|---|
| **Department** | The name of the department for which you are running the report. |
| **Received** | The number of messages received in the queue during the specified time period. This includes messages received via both SMTP and HTTP. |
| **Forwarded Out** | The number of messages forwarded out of the department queue during the specified time period. This includes messages forwarded out by an agent in queue or in session. |
| **Forwarded In** | The number of messages forwarded into the department queue during the specified time period. This includes messages forwarded in by an agent in queue or in session. |
| **Routed Out** | The number of messages automatically routed out of the department queue by the mail system. |
| **Routed In** | The number of messages automatically routed into the department queue by the mail system. |

| Item | Definition |
|---|---|
| **Returned to Queue** | The number of times mail messages were returned to the selected department Mail Queues during the specified time period. A mail message can be returned to the queue from a mail session by an agent or by the mail system if an agent disconnects while the mail is opened in session. |
| **Marked for Follow-Up** | The number of messages answered and marked for follow-up during the specified time period. |
| **Cancelled Follow-Up** | The number of times an agent cancelled a follow-up mail session. This action removes the mail message from the follow-up queue without responding to it. |
| **Answered** | The number of messages answered during the specified time period. This includes single reply messages, multiple reply messages, and messages answered and marked for follow-up. |
| **Originated** | The number of mail messages originated by an agent during the specified time period. |
| **Removals** | The number of times mail messages were removed during the specified time period. This includes messages removed in queue and messages removed in session. Messages removed more than once will register multiple removal counts. |
| **Recoveries** | The number of times mail messages were recovered by an agent during the specified time period. |
| **Purged** | The number of mail messages purged by an agent during the specified time period. This includes messages purged in the queue and messages purged in session. |
| **Archived** | The number of mail messages archived by an agent during the specified time period. This includes messages archived in the queue and messages archived in session. |
| **Average Time in Queue** | The average time messages spent in the queue during the selected time period.<br>This number is calculated by finding the difference between the time each message entered the queue and the time it left the queue, adding the resulting times together, then dividing that time by the number of messages that left the queue during the selected time period.<br>A mail can leave the queue by being taken, removed, purged, forwarded, or archived by either an agent or the mail system. |
| **Average Time in Follow-Up Queue** | The average time messages spent in the follow-up queue before being handled by an agent.<br>This number is calculated by finding the difference between the time each message entered the follow-up queue and the time it left the follow-up queue, adding the resulting times together, then dividing that time by the number of messages that left the follow-up queue.<br>A mail can leave the follow-up queue either by being taken or forwarded out of the queue by an agent. |

| Item | Definition |
|---|---|
| **Total Session Time** | The total session time for all mail sessions for all of the selected departments during the specified time period. This number is reached by calculating the amount of time elapsed between the beginning and end of each completed mail session, and adding the resulting times together.<br>A mail session begins when an agent takes a message from a mail queue, or a message is forwarded in session from one agent to another. A mail session ends when the message is answered, removed, purged, forwarded, archived, follow-up cancelled, or returned in session. |
| **Total Sessions** | The total number of completed mail sessions for the selected department during the specified time period. A mail session is completed when it is answered, removed, purged, forwarded, archived, or returned in session. |
| **Average Session Time** | The average time spent in all sessions during the specified time period. This number is reached by calculating the amount of time elapsed between the beginning and end of each completed mail session, and dividing by the number of completed mail sessions. |
| **Average Initial Response Time** | The average time elapsed between messages entering the queue and being initially answered by an agent.<br>This figure is reached by calculating the time elapsed between each mail message being received and being initially answered by an agent, adding the resulting times together, and then dividing by the number of messages answered during the specified time period. |
| **Average Follow-Up Response Time** | The average time elapsed between a message being marked for follow-up and being answered during the specified time period.<br>This figure is reached by calculating the time elapsed between each mail message being marked for follow-up and being answered by an agent, adding the resulting times together, and then dividing by the number of messages answered from the follow-up queue during the specified time period. |

## Detail Reports

Click the statistic links in the report columns to view detail reports. These reports provide more comprehensive information on many of the report columns described previously.

| Item | Definition |
|---|---|
| **Department Mail Received Activity** | |
| **Message ID** | The message identification number. |
| **Department** | The name of the department to which the message was assigned. |
| **Time Received** | The date and time when the message was received. |
| **Total Time in Queue** | The time that the message spent in the queue before being handled by an agent. |
| **Last Answered Time** | The date and time when the message was answered. |
| **Response Time** | The time at which the response was sent to the customer. |

| Item | Definition |
|---|---|
| **Total Session Time** | The total time that the message was in session with any agent during the specified time period. |
| **Number of Sessions** | The number of times the message was in session with an agent during the specified time period. |
| **Last Agent** | The name and username of the last agent to handle the message. |
| **Last Disposition** | The last disposition the message was in during the specified time period. |
| **View Path** | View pertinent data associated with the message path. |
| **Department Mail Answered Activity** | |
| **Message ID** | The message identification number. |
| **Incident Number** | The message incident tracking number. |
| **Sender** | The address of the person who sent the e-mail message. |
| **Department** | The department to which the message was assigned. |
| **Time Received** | The date and time the message was received. |
| **Time in Queue** | The time the message spent in queue before being handled by an agent. |
| **Time Answered** | The date and time the message was answered. |
| **Response Time** | The time elapsed between receiving the message and responding to it. |
| **Total Session Time** | The total time the message spent in a session with an agent. |
| **Number of Sessions** | The number of times the agent was in session with the message. |
| **Agent** | The name and username of the agent that handled the message. |
| **Disposition** | The last action taken with the message. |
| **View Reply** | View the message sent to the customer. |
| **View Path** | View information pertinent to the message path. |
| **Department Mail Originated Activity** | |
| **Message ID** | The message ID number. |
| **Incident Number** | The incident tracking number. |
| **Recipient** | The person to whom the message was sent. |
| **Department** | The department from which the message originated. |
| **Subject** | The subject of the message. |
| **Time Sent** | The time when the message was sent. |
| **Agent** | The name and username of the agent who sent the message. |
| **Disposition** | The last action taken with the message. |
| **Department Mail Removal Activity** | |
| **Message ID** | The message ID number. |
| **Department** | The department from which the message was removed. |

| Item | Definition |
|---|---|
| **Time received** | The date and time the message was received. |
| **Time in Queue** | The time the message spent in queue before being handled by an agent. |
| **Time Removed** | The date and time the message was removed. |
| **Total Session Time** | The total time the message spent in a session with an agent. |
| **Number of Sessions** | The number of times the agent was in session with the message. |
| **Agent** | The name and username of the agent that removed the message. |
| **Last Disposition** | The last action taken with the message. |
| **View Path** | View information pertinent to the message path. |
| **Department Mail Purged Activity** | |
| **Message ID** | The message ID number. |
| **Department** | The department from which the message was purged. |
| **Time Received** | The date and time the message was received. |
| **Time in Queue** | The time the message spent in queue before being handled by an agent. |
| **Time Purged** | The date and time the message was purged. |
| **Total Session Time** | The total time the message spent in a session with an agent. |
| **Number of Sessions** | The number of times the agent was in session with the message. |
| **Agent** | The name and username of the agent who purged the message. |
| **Disposition** | The last action taken with the message. |
| **View Path** | View information pertinent to the message path. |
| **Department Mail Archived Activity** | |
| **Message ID** | The message ID number. |
| **Department** | The department from which the message was archived. |
| **Time Received** | The date and time the message was received. |
| **Time in Queue** | The time the message spent in queue before being handled by an agent. |
| **Time Archived** | The date and time the message was archived. |
| **Total Session Time** | The total time the message spent in a session with an agent. |
| **Number of Sessions** | The number of times the agent was in session with the message. |
| **Agent** | The name and username of the agent who archived the message. |
| **Disposition** | The last action taken with the message. |
| **View Path** | View information pertinent to the message path. |
| **Department Daily Mail Activity** | |
| **Department** | The name and identification number of the department. |
| **Date** | The date associated with the row of data. |

| Item | Definition |
|---|---|
| **Received** | The number of messages received during the specified time period. |
| **Forwarded Out** | The number of messages forwarded out of the department during the specified time period. |
| **Forwarded In** | The number of messages forwarded into the department during the specified time period. |
| **Routed Out** | The number of messages routed out of the department by the mail system during the specified time period. |
| **Routed In** | The number of messages routed into the department by the mail system during the specified time period. |
| **Returned to Queue** | The number of messages returned to the queue by both the mail system and agents during the specified time period. The same message can be counted as returned more than once if it is repeatedly removed and returned. |
| **Marked for Follow-Up** | The number of messages answered by an agent and subsequently marked for follow-up during the specified time period. |
| **Cancelled Follow-Up** | The number of messages for which follow-up was cancelled during the specified time period. |
| **Answered** | The number of messages answered during the specified time period. |
| **Originated** | The number of messages that originated in the department during the specified time period. |
| **Removals** | The number of messages removed from the queue by agents during the specified time period. This includes messages removed in queue and messages removed in session. Messages removed more than once will register multiple removal counts. |
| **Recoveries** | The number of messages recovered during the specified time period. |
| **Purged** | The number of messages purged during the specified time period. This includes messages purged in the queue and messages purged in session. |
| **Archived** | The number of messages archived during the specified time period. This includes messages purged in the queue and messages archived in session. |
| **Average Time in Queue** | The average time messages spent in the queue before being handled by an agent. |
| **Average Time in Follow-Up Queue** | The average time messages spent in the follow-up queue before being handled by and agent. |
| **Total Session Time** | The total time of all department mail sessions during the specified time period. |
| **Total Sessions** | The total number of mail sessions for the department during the specified time period. |
| **Average Session Time** | The average time spent in all sessions during the specified time period. |
| **Average Initial Response Time** | The average time elapsed between messages entering the queue and being initially handled by an agent during the specified time period. |

| Item | Definition |
|---|---|
| **Average Follow-Up Response Time** | The average time elapsed between a message being marked for follow-up and being handled during the specified time period. |
| **View Hourly Mail** | A summary of messages handled, broken down by hour. |
| **Department Hourly Mail Activity Summary** | |
| **Department** | The name and identification number of the department. |
| **Hour Starting At** | The hour to which the row of data corresponds. |
| **Received** | The number of messages received during the hour shown. |
| **Forwarded Out** | The number of messages forwarded out of the department during the hours shown. |
| **Forwarded In** | The number of messages forwarded into the department during the hours shown. |
| **Routed Out** | The number of messages routed out of the department by the mail system during the hours shown. |
| **Routed In** | The number of messages routed into the department by the mail system during the hours shown. |
| **Returned to Queue** | The number of messages returned to the queue by both the mail system and agents during the hours shown. The same message can be counted as returned more than once if it is repeatedly removed and returned. |
| **Marked for Follow-Up** | The number of messages answered by an agent and subsequently marked for follow-up during the specified time period. |
| **Cancelled Follow-Up** | The number of messages for which follow-up was cancelled during the hours shown. |
| **Answered** | The number of messages answered during the hours shown. |
| **Originated** | The number of messages that originated in the department during the specified time period. |
| **Removals** | The number of messages removed from the queue by agents during the hours shown. This includes messages removed in queue and messages removed in session. Messages removed more than once will register multiple removal counts. |
| **Recoveries** | The number of messages recovered during the hours shown. |
| **Purged** | The number of messages purged during the hours shown. This includes messages purged in the queue and messages purged in session. |
| **Archived** | The number of messages archived during the hours shown. This includes messages archived in the queue and messages archived in session. |
| **Average Time in Queue** | The average time messages spent in the queue before being handled by an agent. |
| **Average Time in Follow-Up Queue** | The average time messages spent in the follow-up queue before being handled by and agent. |
| **Total Session Time** | The total time of all department mail sessions during the hours shown. |

| Item | Definition |
|---|---|
| **Total Sessions** | The total number of mail sessions for the department during the hours shown. |
| **Average Session Time** | The average time spent in all sessions during the hours shown. |
| **Average Initial Response Time** | The average time elapsed between messages entering the queue and being initially handled by an agent during the hours shown. |
| **Average Follow-Up Response Time** | The average time elapsed between a message being marked for follow-up and being handled during the hours shown. |

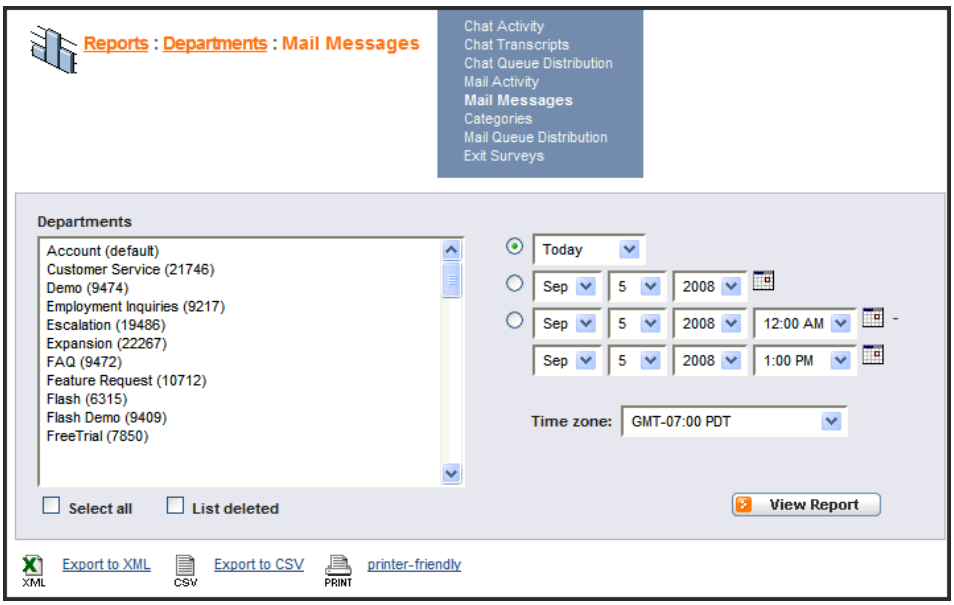
## Dispositions

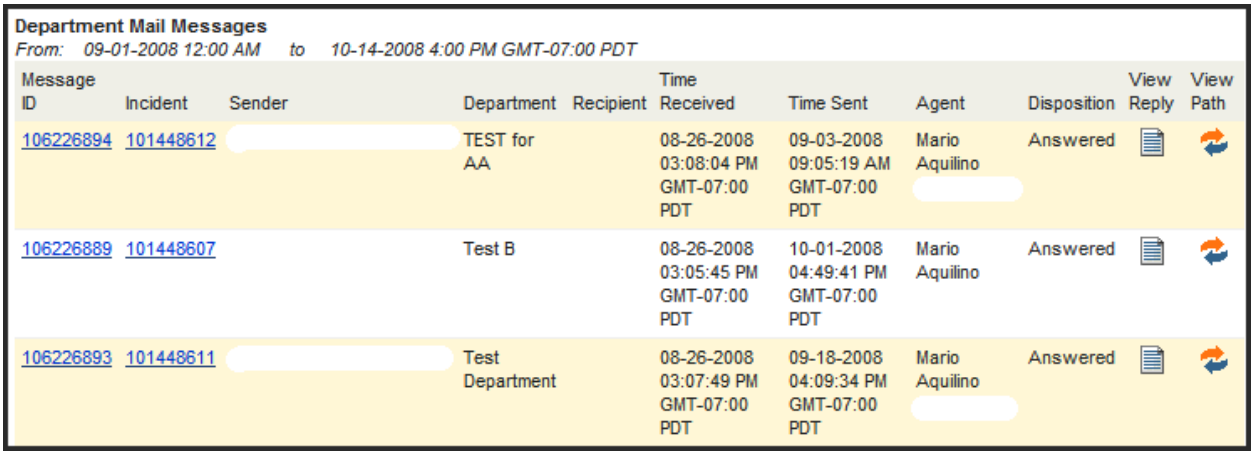
The following are the definitions for the dispositions found in the **Department Mail Activity Report**:

| Item | Definition |
|---|---|
| **Removed in Queue** | An agent removed the mail message directly from the queue. |
| **Removed in Session** | An agent removed the mail message from within the mail session after they had taken the message from the queue. |
| **Purged in Queue** | An agent purged the mail message directly from the queue. |
| **Purged in Session** | An agent purged the mail message from within the mail session after they had taken the message from the queue. |
| **Archived in Queue** | An agent archived the mail message directly from the Mail Queue. |
| **Archived in Session** | An agent archived the mail message from within the mail session after they had taken the message from the Mail Queue. |
| **Forwarded to Agent** | An agent forwarded the mail message to a different agent. |
| **Forwarded to Department** | An agent forwarded the mail message to either the same queue it was taken from or a new department. |
| **Answered** | An agent replied to the mail message. |
| **Sent** | An agent sent a mail message that was not a response to an incoming message. |
| **Follow-up Cancelled** | An agent cancelled a follow-up mail session for the mail message. |
| **Answered – Pending Follow-up** | An agent marked the mail message for follow-up. |
| **Answered – No Follow-up** | An agent replied to the mail message via a follow-up mail session, but did not mark it for further follow-up. |
| **Forwarded (in follow-up queue)** | An agent forwarded the mail message from the general follow-up queue to a specific department follow-up queue. |
| **Waiting in follow-up queue** | The mail message is waiting in the follow-up queue. |

## Mail Messages

This report provides you with a view of customer mail messages and other related details for a selected time period.



**Department Mail Messages**
*From: 09-01-2008 12:00 AM to 10-14-2008 4:00 PM GMT-07:00 PDT*

| Message ID | Incident | Sender | Department | Recipient | Time Received | Time Sent | Agent | Disposition | View Reply | View Path |
|---|---|---|---|---|---|---|---|---|---|---|
| 106226894 | 101448612 | | TEST for AA | | 08-26-2008 03:08:04 PM GMT-07:00 PDT | 09-03-2008 09:05:19 AM GMT-07:00 PDT | Mario Aquilino | Answered | | |
| 106226889 | 101448607 | | Test B | | 08-26-2008 03:05:45 PM GMT-07:00 PDT | 10-01-2008 04:49:41 PM GMT-07:00 PDT | Mario Aquilino | Answered | | |
| 106226893 | 101448611 | | Test Department | | 08-26-2008 03:07:49 PM GMT-07:00 PDT | 09-18-2008 04:09:34 PM GMT-07:00 PDT | Mario Aquilino | Answered | | |

Links are available to detailed reports for:

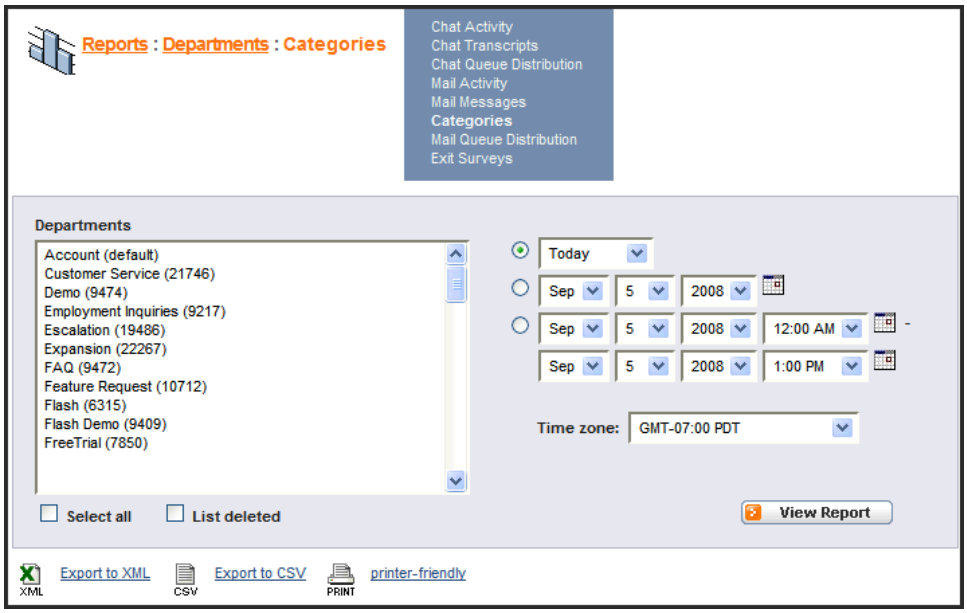
- Mail Message (from Message ID and the **View Reply** icon)
- Customer Incident
- Email Address History (from the Sender links)
- Mail Message History Detail (from the **View Path** icon)

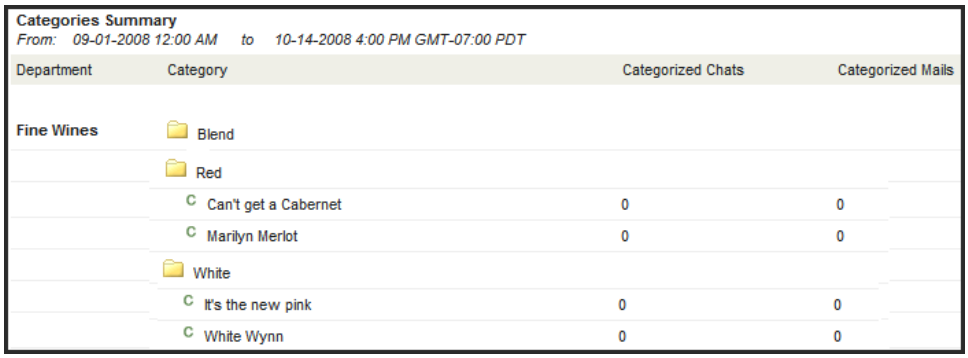
## Dispositions

| Disposition | Definition |
|---|---|
| **Mail Answered** | An agent replied to the customer mail message in a mail session. |
| **Mail Originated** | The mail message originated from the agent in a new mail session. |

## Categories

The Categories Summary Report is a comprehensive report that allows you to view the number of mails that were categorized by your agents during the selected time period.



Categories Summary
*From: 09-01-2008 12:00 AM to 10-14-2008 4:00 PM GMT-07:00 PDT*

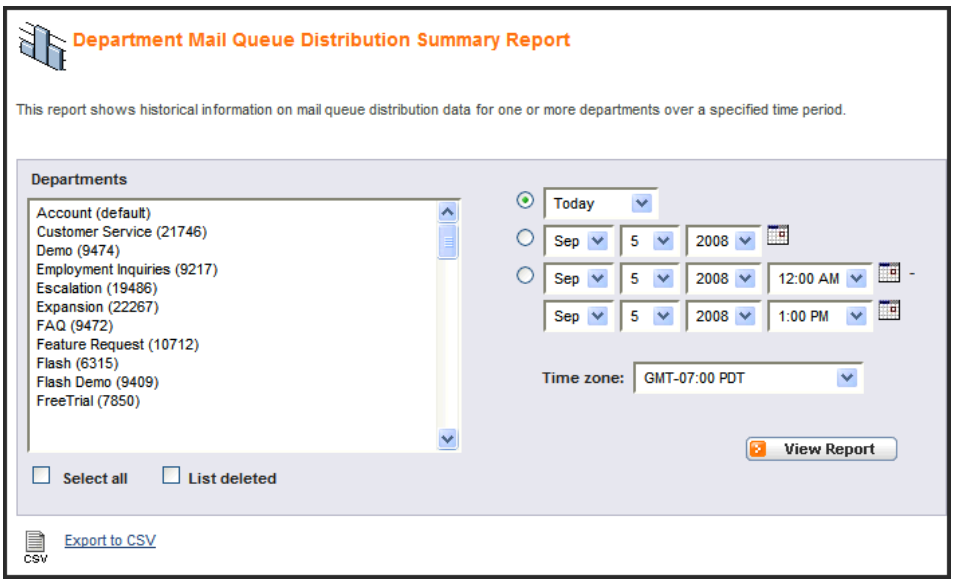
| Department | Category | Categorized Chats | Categorized Mails |
|---|---|---|---|
| Fine Wines | Blend | | |
| | Red | | |
| | Can't get a Cabernet | 0 | 0 |
| | Marilyn Merlot | 0 | 0 |
| | White | | |
| | It's the new pink | 0 | 0 |
| | White Wynn | 0 | 0 |

This report provides an alphabetized listing of all folders associated with the selected department and the Account (default) department.

Folders can contain any number of categories. The categories are listed under their respective folders. The report lists the total number of chat and mail messages that have been categorized in the various folders.

## Mail Queue Distribution

This report provides information on Mail Queue distribution for your departments during a selected time period.




**Note:** This report performs differently from other reports by opening in its own separate browser window and lacks the additional navigational links at the top of the page. This is part of the nature of the queue distribution summary report and is normal.

The statistics summarize the different types of events recorded for queue distribution assigned items. For departments with valid data for the selected time period, a detail report is available which provides specific details on that department's assigned chats.

This detail report lists the department into which each mail message entered, the time each message was assigned to the particular agent, and the time and type of the event that occurred.

The events recorded for Mail Queue distribution are:

- Assignment expired
- Agent took assigned item
- Assignment taken by another agent
- Agent exited while item was assigned
- Mail no longer available

**Note:** If Mail Queue distribution events occurred for agents in any of the chosen departments during the selected time period, a bar chart displays each occurrence and type of event.

### Statistics

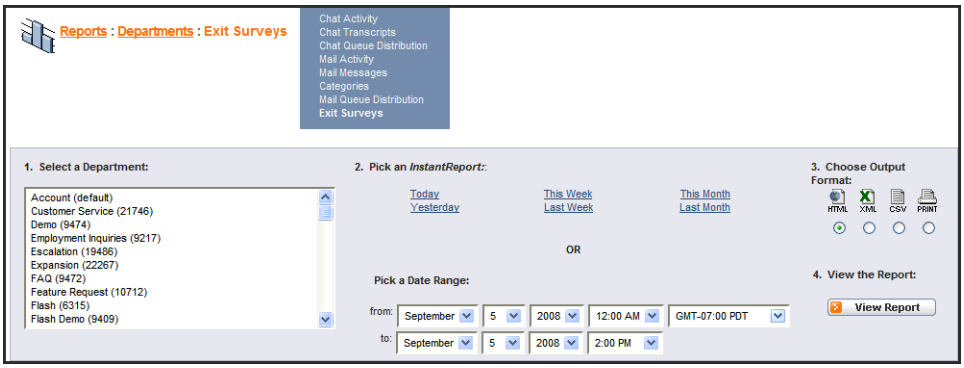
The following statistics are provided on the **Department Mail Queue Distribution Summary Report** for each selected department:

| Disposition | Definition |
|---|---|
| **Total Assigned** | The total number of Mail Queue distribution events that occurred for agents assigned to the department during the selected time period. |
| **Assignment Expired** | The total number of mail messages that were assigned to agents in the department but expired during the selected time period. |
| **Taken by Assigned** | The total number of mail messages assigned to agents in the department and taken during the selected time period. |
| **Taken by Other** | The total number of mail messages assigned to agents in the department but taken by another agent during the selected time period. |
| **Agent Exited** | The total number of mail messages assigned to agents in the department not taken due to the agent exiting while the message was assigned. |
| **Mail No Longer Available** | The total number of mail messages that were assigned to agents in the department but were no longer available, for example, the message had been removed, purged, archived, or forwarded to another department. |

## Exit Surveys

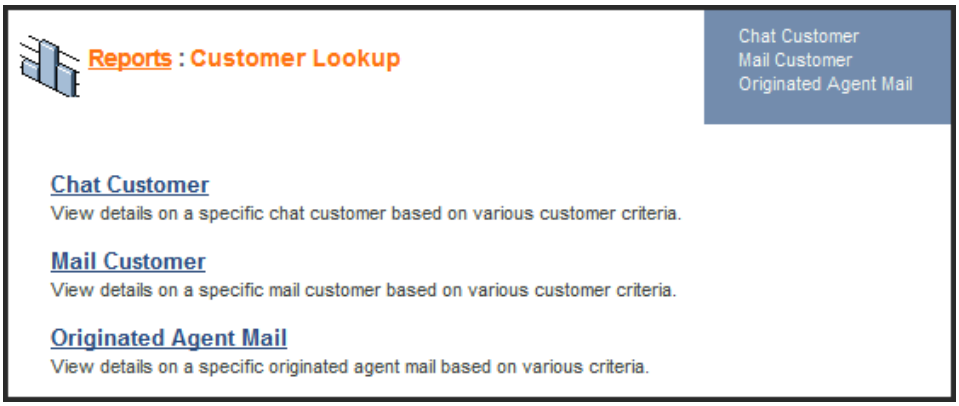
The Survey Summary Report shows all of the exit surveys that have been filled out by your customers during the selected time period.

The average score for each question is shown at the end of the respective bar. The number in parentheses in each column is the number of customers choosing that score for the question.



# Customer Lookup

Use the Customer Lookup section to search for specific customers using criteria you choose. You may perform searches using qualifiers.




These reports perform **case-insensitive** searches on text fields over the period you select. For example, entering **`instantservice`** or **`InstantService`** under Select Criteria returns the same results.

You can use an option to view all results regardless of date. This option is only available when you search using the **Equals** or **Starts With** qualifiers.

> **Note:** A search on optional data fields requires a minimum of three characters. A search on email addresses requires a minimum of five characters.

### To run customer lookup reports:

1. On the Customer Lookup Portal, click **one** of the links:
    - Chat Customer
    - Mail Customer
    - Originated Agent Mail
2. On the page you chose, select criteria by doing the following:
    - Select a **lookup** from the first menu. Choices can include:
    - Customer ID
    - Mail Message ID
    - Incident Number
    - First Name
    - Last Name
    - Phone Number

- Email Address
- Recipient Email
- Optional Data choices

**Note:** For more information, see Optional Data Labels

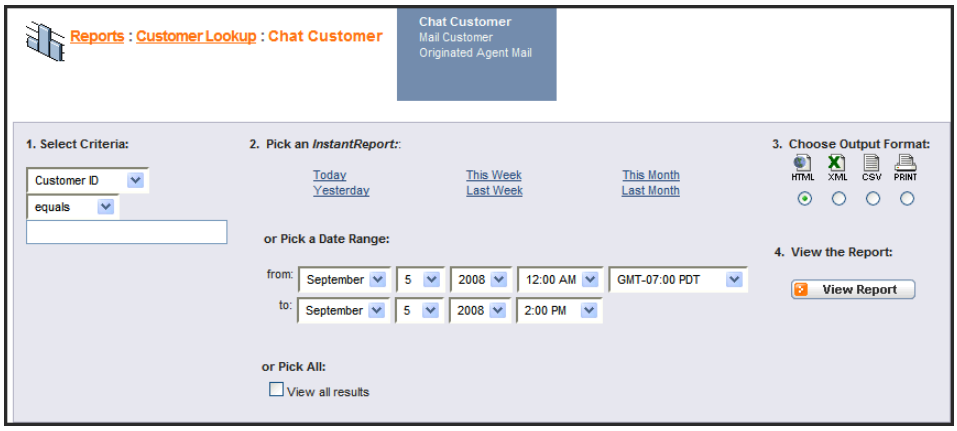
- Select a **qualifier** from the second menu. Choices include:
- Equals
- Contains
- Starts with
- Ends with
- Type a **lookup value**. This can include anything the system can use to find the information you are looking for.

3. Do **one** of the following:
   - Click a link for an **InstantReport**. Choices include:
   - Today
   - Yesterday
   - This Week
   - Last Week
   - This Month
   - Last Month.
   - Use the menus to pick a date range.

**Note:** Data for date ranges is available from 2005 to the present.

   - Select the **View All Results** check box.
4. Choose **one** of the following output formats, and click **View Report**. Choices include:
   - **HTML:** Default choice; the report opens at the bottom of the page.
   - **XML:** Opens a dialog so you can open or save the file.
   - **CSV (comma separated values):** Opens a dialog so you can open or save the file.
   - **Print:** Opens a new browser window from which you can print the report.

## Chat Customer Look-up




**Chat Customer**
All results

| Customer ID | Incident | Customer | Email | Department |
|---|---|---|---|---|
| 66718932 | 115647395 | scott | support@instantservice.com | InstantInvite Proactive Chat |
| 66717479 | 115644649 | Tim | support@instantservice.com | InstantInvite LivePerson Referral |
| 66678877 | 115566304 | Tim Test | support@instantservice.com | Sales - Via Website |
| 66670538 | 115549929 | test | support@instantservice.com | InstantInvite LivePerson Referral |
| 66669816 | 115548550 | Tim Test | support@instantservice.com | Sales - Via Website |
| 66669096 | 115547155 | test | support@instantservice.com | InstantInvite Proactive Chat |

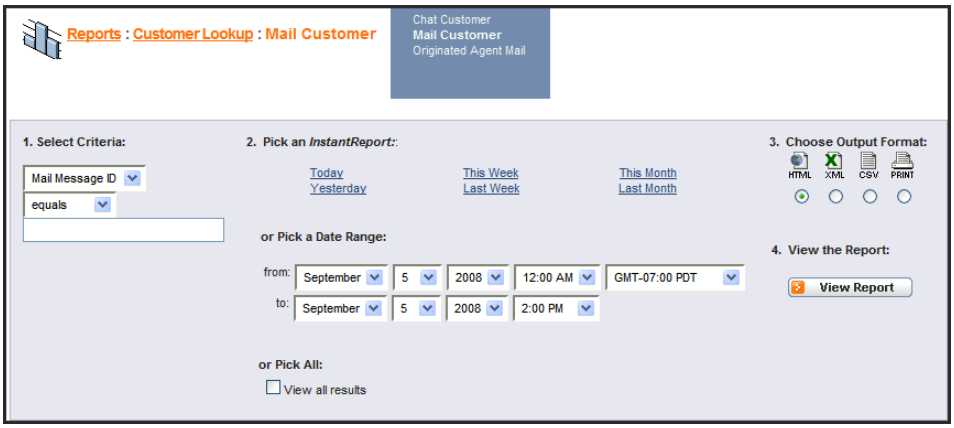
Links are available in the HTML version to detailed reports for:

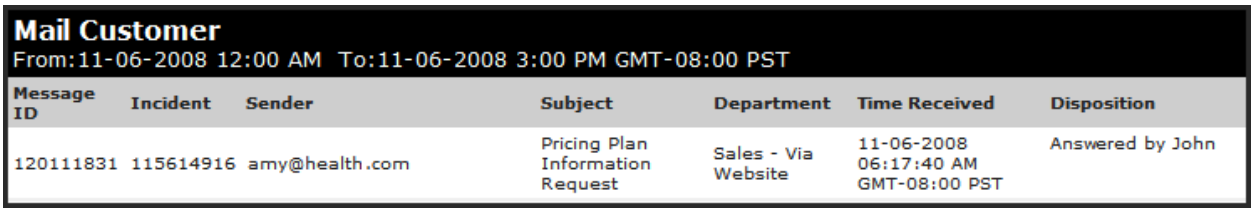
- Customer Record
- Customer Incident
- Email Address History
- Chat Transcript (from the **View Transcript** icon)
- Chat Customer History Detail (from the **View Path** icon)

The following definitions for the various dispositions are found in the Customer Lookup chat section:

| Disposition | Definition |
|---|---|
| **Chat Missed** | The chat request was denied due to a closed Chat Queue or no available agents. |
| **Chat Abandoned** | An agent never took the customer out of the Chat Queue. |
| **Chat Transferred to Agent** | An agent transferred the customer to a different agent, bypassing the Chat Queue. |
| **Chat Transferred to Department** | An agent transferred the customer to the same department from which they were taken or to a different department. |
| **Chat Customer Left** | The customer left the chat before being taken by an agent following a transfer to a department. |

## Mail Customer Look-up



**Mail Customer**
From:11-06-2008 12:00 AM To:11-06-2008 3:00 PM GMT-08:00 PST

| Message ID | Incident | Sender | Subject | Department | Time Received | Disposition |
|---|---|---|---|---|---|---|
| 120111831 | 115614916 | amy@health.com | Pricing Plan Information Request | Sales - Via Website | 11-06-2008 06:17:40 AM GMT-08:00 PST | Answered by John |

Links are available in the HTML version to detailed reports for:

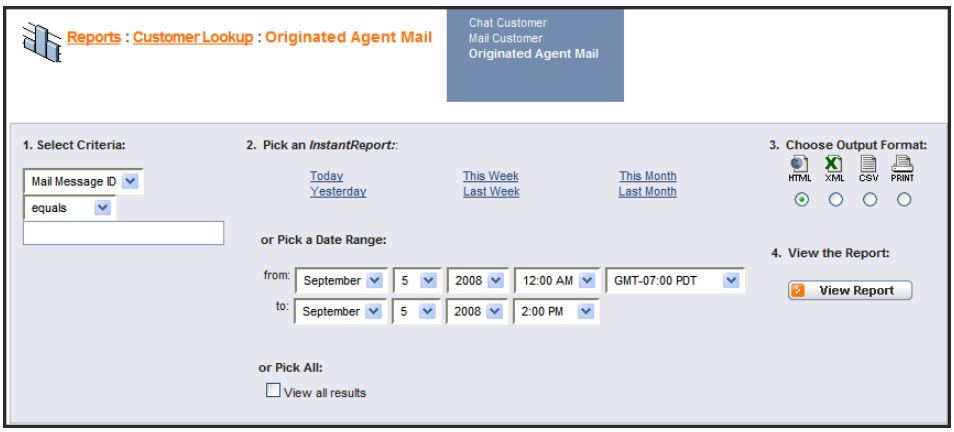
- Mail Message
- Customer Incident
- Email Address History
- Mail Message (from the **View Transaction** icon)
- Mail Message History Detail (from the **View Path** icon)

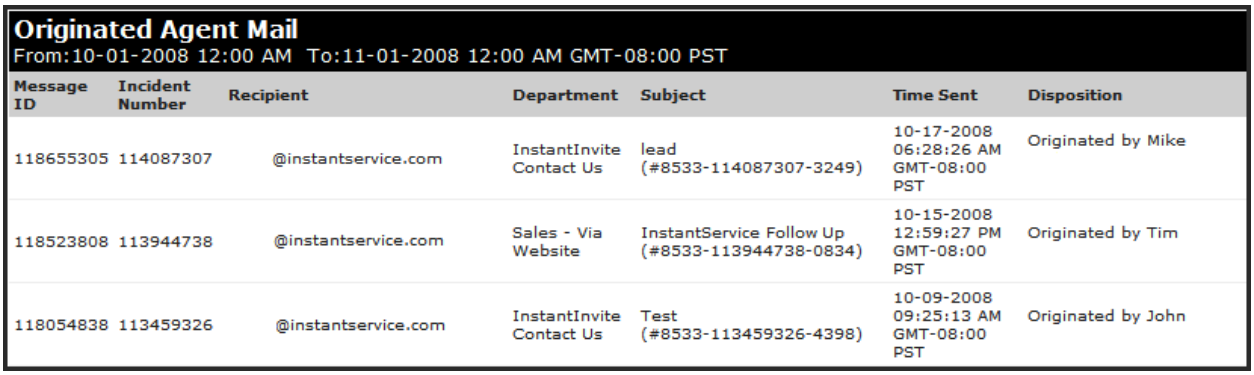
The following definitions for the various dispositions are found in the Customer Lookup Mail section:

| Disposition | Definition |
|---|---|
| **Mail Waiting in Queue** | A mail message is in the Mail Queue waiting for an agent to take action, such as take, remove, purge, or archive. |
| **Mail Removed in Queue** | An agent removed the mail message directly from the Mail Queue. |
| **Mail Removed in Session** | An agent removed the mail message from within a mail session after taking the message out of the Mail Queue. |
| **Mail Purged in Queue** | An agent purged the message directly from the Mail Queue. |
| **Mail Purged in Session** | An agent purged the mail message from within a mail session after taking the message out of the Mail Queue. |
| **Mail Archived in Queue** | An agent archived the message directly from the Mail Queue. |
| **Mail Archived in Session** | An agent archived the mail message from within a mail session after taking the message out of the Mail Queue. |

| Disposition | Definition |
|---|---|
| **Mail Forwarded to Agent** | An agent forwarded the mail message to another agent, bypassing the Mail Queue. |
| **Mail Forwarded to Department** | An agent forwarded the mail message either to the same department he or she took it from or to a new department. |
| **Mail Answered** | An agent answered the mail message in a mail session. |

## Originated Agent Mail



**Originated Agent Mail**
From:10-01-2008 12:00 AM To:11-01-2008 12:00 AM GMT-08:00 PST

| Message ID | Incident Number | Recipient | Department | Subject | Time Sent | Disposition |
|---|---|---|---|---|---|---|
| 118655305 | 114087307 | @instantservice.com | InstantInvite Contact Us | lead (#8533-114087307-3249) | 10-17-2008 06:28:26 AM GMT-08:00 PST | Originated by Mike |
| 118523808 | 113944738 | @instantservice.com | Sales - Via Website | InstantService Follow Up (#8533-113944738-0834) | 10-15-2008 12:59:27 PM GMT-08:00 PST | Originated by Tim |
| 118054838 | 113459326 | @instantservice.com | InstantInvite Contact Us | Test (#8533-113459326-4398) | 10-09-2008 09:25:13 AM GMT-08:00 PST | Originated by John |

Links are available in the HTML version to detailed reports for:

- Mail Message
- Customer Incident
- Email Address History

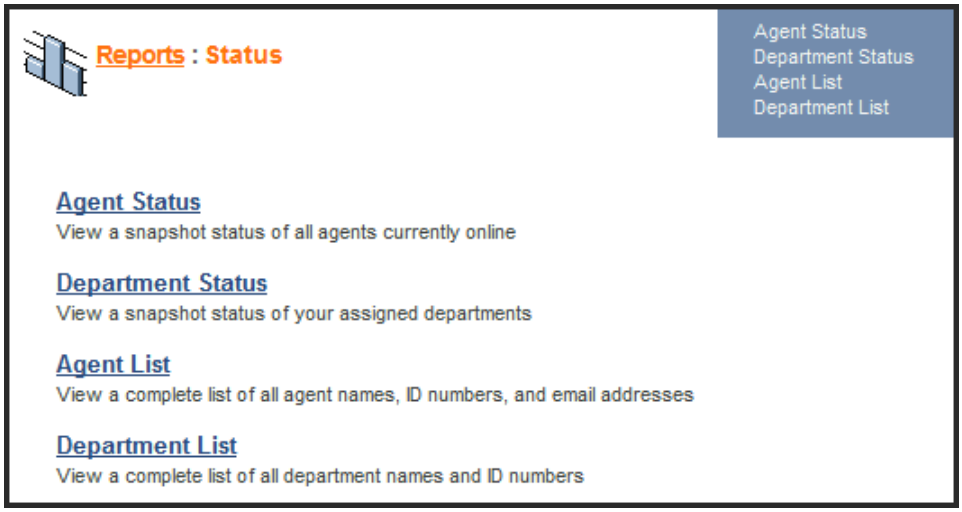
The Originated Agent Mail Report contains the following columns:

| Column Name | Description |
|---|---|
| **Message ID (Detail for Mail Message Report)** | The ID number of the message. |
| **Incident Number (Detail for Customer Incident Report)** | The incident number associated with the message. |

| Column Name | Description |
|---|---|
| **Recipient (Detail for Email Address History Report)** | The address to which the message was sent. |
| **Department** | The department from which the message originated. |
| **Subject** | The subject of the message. |
| **Time Sent** | The date and time the message was sent. |
| **Disposition** | The name and username of the agent who originated the message. |

# Status

The Status Reports Portal allows you to run real-time monitoring and administrative reports on agents and departments for your company account.




## Running Status Reports

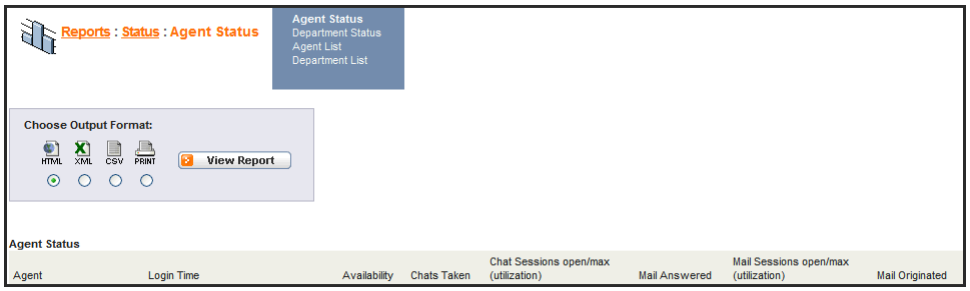
Use the following procedure when running status reports.

### To run a status report:

1. Open your chosen status page. The HTML version appears at the bottom of the page.
2. If you want to use the other output formats, click the **XML**, **CSV**, or **Print** option, and click **View Report**.
3. For the XML and CSV formats, a dialog appears so you can save the file. For the Print format, a new browser window opens; use the browser functions to make a copy of the report or save it to a folder.

## Agent Status

The Agent Status Report displays the status of all agents currently logged in.




**Agent Status**

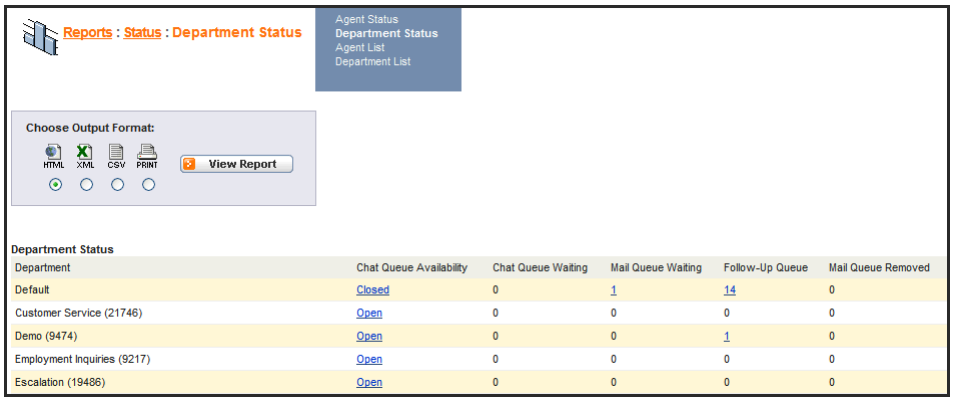
| Agent | Login Time | Availability | Chats Taken | Chat Sessions open/max (utilization) | Mail Answered | Mail Sessions open/max (utilization) | Mail Originated |
|---|---|---|---|---|---|---|---|
| Eric | 11-06-2008 06:39 AM GMT-08:00 | available | 2 | 0/5 (00.00%) | 1 | 0/5 (00.00%) | 0 |
| John | 11-06-2008 06:37 AM GMT-08:00 | unavailable (away) | 6 | 0/5 (00.00%) | 5 | 0/5 (00.00%) | 0 |
| Karol | 11-06-2008 07:43 AM GMT-08:00 | available | 3 | 1/10 (10.00%) | 4 | 0/10 (00.00%) | 0 |
| Sharon | 11-06-2008 08:05 AM GMT-08:00 | available | 2 | 0/5 (00.00%) | 0 | 0/5 (00.00%) | 0 |

The following are definitions of the various result fields for the **Agent Status Report**:

| Result Field Name | Description |
|---|---|
| **Agent** | The name and login name of the agent. |
| **Login Time** | The date and time the agent logged into the Agent Console. |
| **Availability** | The current availability status of the agent. |
| **Chats Taken** | The number of chat sessions entered by the agent since logging into the Agent Console. |
| **Chat Sessions Open/Max (Utilization)** | The ratio of chat sessions open to max chat sessions allowed. |
| **Mail Answered** | The number of mail messages the agent has replied to since logging into the Agent Console. |
| **Mail Sessions Open/Max (Utilization)** | The ratio of mail sessions open to max mails sessions allowed. Multiple mail replies are counted as one session.<br>**Note:** Use the detail link to view open mail messages. A detail report is not available for chat. |
| **Mail Originated** | The number of mail messages an agent has sent that are not in response to customer mail messages. |

## Department Status

The Department Status Report displays the number of chats and mail messages waiting in each of your department queues.




**Department Status**

| Department | Chat Queue Availability | Chat Queue Waiting | Mail Queue Waiting | Follow-Up Queue | Mail Queue Removed |
|---|---|---|---|---|---|
| Default | Open | 0 | 0 | 0 | 0 |
| Customer Service (21746) | Open | 0 | 0 | 0 | 0 |
| Demo (9474) | Open | 0 | 0 | 0 | 0 |
| FAQ (9472) | Open | 0 | 0 | 0 | 0 |
| Flash (6315) | Open | 0 | 0 | 0 | 0 |
| Flash Demo (9409) | Open | 0 | 0 | 0 | 0 |
| FreeTrial (7850) | Open | 0 | 0 | 0 | 0 |
| General Information & Comments (9216) | Open | 0 | 0 | 0 | 0 |

Links are available in the HTML version to detailed reports for Current Agent State.

You can perform the following:

- To view the details of currently available agents assigned to each department, click the associated department **Chat Queue Availability** link. This applies only to agents who are currently logged into the system.

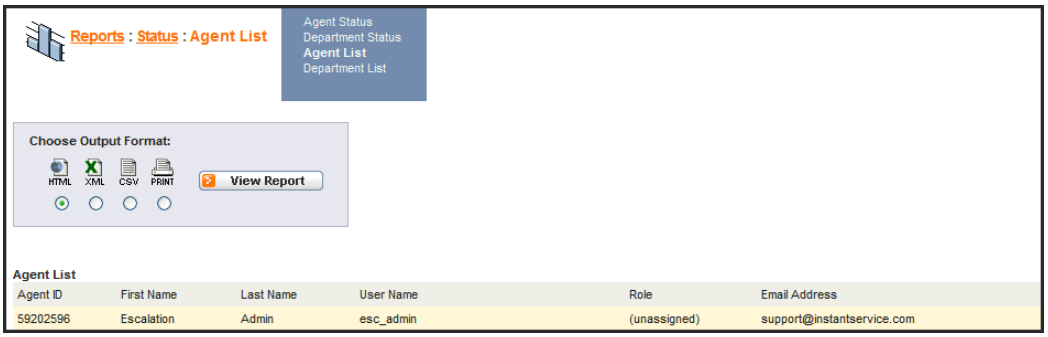
  **Note:** The Department Status Report only lists those departments to which the agent running the report is assigned.

- To view details about the customers waiting in a department queue, click the **Chat Queue Waiting** link for a department. Clicking this link provides the following information:
  - Customer ID
  - Login Time
  - Total time spent in the queue for each customer

- If you have mail enabled for your account, you can view details of department mail messages by clicking the department **Mail Queue Waiting** link. Clicking this link provides the following information:
  - Message sent from address
  - Message received time
  - Time the message was received
- To view details of mail messages currently marked for follow-up, click the department **Follow-Up Queue** link. Clicking this link provides the following information:
  - Message sent from address
  - Message received time
  - Time the message was last responded to
  - The agent that marked the message for follow-up
- To view details of department removed mail messages, click the department **Mail Queue Removed** link. Clicking this link provides the following information:
  - Message sent from address
  - Message received time
  - Time the message was removed from the queue

## Agent List

This section provides access to a comprehensive list of all agents for your account. The report lists the agent IDs, names, user names, roles, and mail addresses.



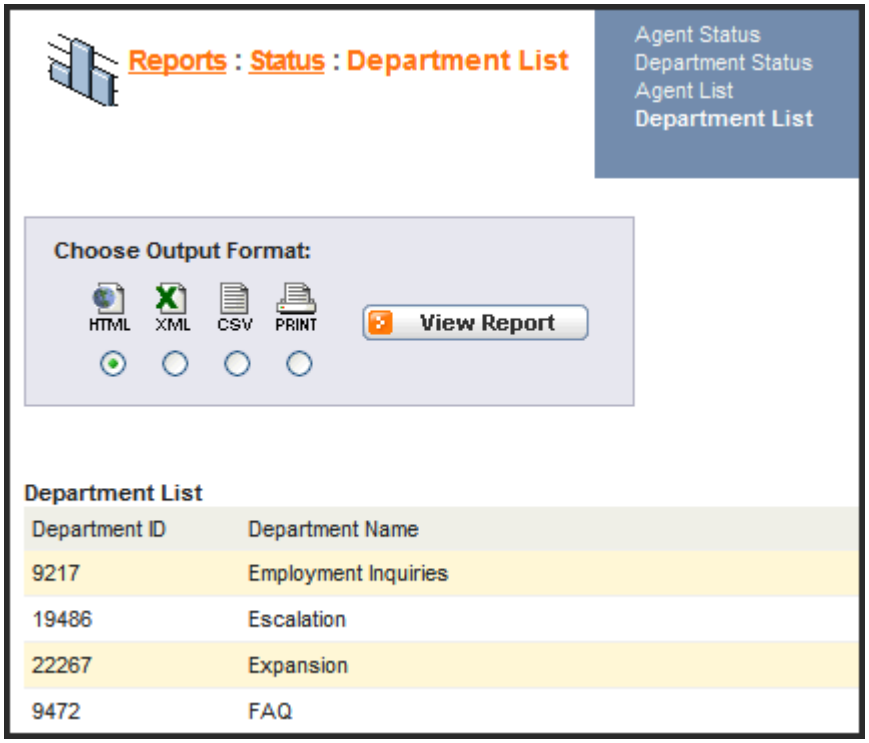

**Agent List**

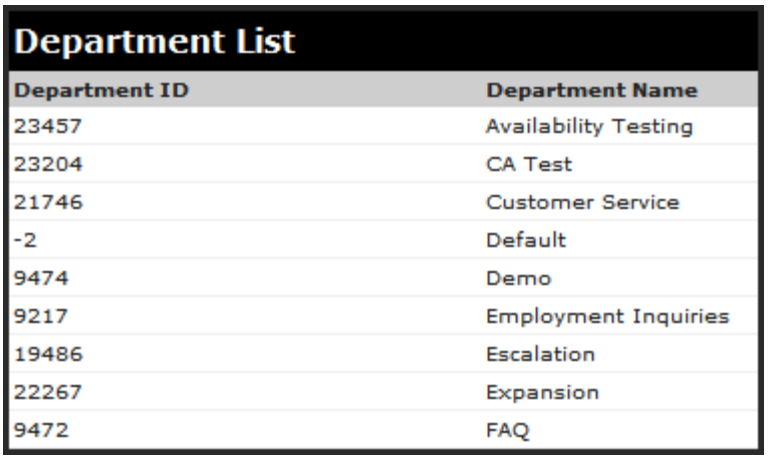
| Agent ID | First Name | Last Name | User Name | Role | Email Address |
|---|---|---|---|---|---|
| 59202596 | Escalation | Admin | esc_admin | (unassigned) | support@instantservice.com |
| 59278141 | Test | Agent | qa | (unassigned) | support@instantservice.com |
| 26789464 | Adrian | | | (unassigned) | support@instantservice.com |
| 58183962 | Ken | | | (unassigned) | support@instantservice.com |
| 53192635 | Marc | | | (unassigned) | support@instantservice.com |
| 36786478 | Jessica | | | Agents | support@instantservice.com |

No additional information is available from this report.

## Department List

This section provides access to a list of all departments for your account. The report lists all departments and their respective IDs.



**Department List**

| Department ID | Department Name |
|---|---|
| 23457 | Availability Testing |
| 23204 | CA Test |
| 21746 | Customer Service |
| -2 | Default |
| 9474 | Demo |
| 9217 | Employment Inquiries |
| 19486 | Escalation |
| 22267 | Expansion |
| 9472 | FAQ |

All departments are listed despite your department assignments. Additional department information is not available from this report.

# Appendix 1: Glossary

The following terms are used throughout this manual to describe activities within Account Administration:

| Term | Definition |
|---|---|
| **Agent** | A user of the InstantService account. Agents—by their permissions—can be identified as Account Administrators, Supervisors, Customer Service Representatives, or a combination of these job descriptions. |
| **Account Administration** | This is the interface that allows account administrators to uniquely configure their InstantService account and access reporting features. |
| **Account Administrator** | An agent who has access and permissions to make changes in Account Administration. |
| **Address Entry box** | This box is located below the Chat Session tab or the Mail Session tab. Web addresses being sent to customers are entered in this box. |
| **Administrator** | An agent with a set of permissions allowing him or her to make changes to the Account, Department, Agent, and Report settings of the InstantService system. |
| **Agent Console** | This is the InstantService interface that agents use for InstantService chat and email. It is broken into four sections called **quadrants** (also known as **panels**):<br>♦ The lower left quadrant houses the Agent Room, live Chat Sessions, and open Mail Sessions.<br>♦ The lower right quadrant holds the Agent Information window, the Customer Details window, and Mail Message Details window.<br>♦ The upper left quadrant houses the Response Libraries.<br>♦ The upper right quadrant holds the Chat Queue, Chat sessions, and Mail Queue. |
| **Agent Disconnection** | This InstantService Chat feature redirects a chat customer, who has been disconnected from an agent, back to the Chat Queue. When a disconnected customer returns to the Chat Queue, their listing is in blue to indicate having been disconnected from an agent. |
| **Agent Inactivity** | The Agent Console auto logs off an agent after their account has gone inactive for a specified time. |
| **Agent Information window** | This window displays the availability status of all logged on agents and is located in the lower right quadrant of the Agent Console. |
| **Agent Rights** | These department level permissions define which agents have transferring or forwarding rights to a department. |

| Term | Definition |
|---|---|
| **Agent Room Dialog Window** | This window located below the Agent Room tab in the lower left quadrant of the Agent console displays all dialog exchanged in the Agent room. |
| **Agent Room Tab** | This tab in the lower left quadrant of the Agent Console displays the agent room dialog window, the Agent Information window and the agent text entry box. |
| **Available/Unavailable Radial Boxes** | These boxes are located in the lower right quadrant of the Agent Console below the Agent Information window and allow an agent to change their availability status. |
| **Quadrant** | This term describes the regions within the Agent Console, also referred to as **panels**. There are four: the upper left quadrant, the upper right quadrant, the lower left quadrant, and the lower right quadrant. |
| **Chat Queue** | The Chat Queue displays the status of customers waiting in queue for chat assistance. It is located in the upper right quadrant of the Agent Console and is activated by selecting the Chat Queue tab. |
| **Chat Session** | This term refers to the process or time that an agent and a customer our engaged in chat transaction. |
| **Chat Queue tab** | This tab is located in the upper right quadrant of the Agent Console and displays the number of customers waiting in queue for an agent. Selecting this tab displays the Customer Chat Queue Information window. |
| **Chat Session Dialog Window** | This window displays all dialog exchanges of a chat session and is located under the Address Entry box of a live chat. |
| **Chat Sessions Information Window** | This window is located in the upper right quadrant of the Agent Console below the Chat Sessions tab. This window displays all active chat sessions including the following fields: Agent, Customer, Department, and Start Time. |
| **Chat Session Tab** | This is the tab for a live chat session that either contains the customer's name or their unique ID number. Selecting this tab exposes its live chat session. |
| **Close Session Button** | This button is located in the lower right quadrant of the Agent Console below the Customer Details window. Selecting this button closes a chat session and removes it from the Agent Console. |
| **Customer Chat Queue Information Window** | This window is located in the upper right quadrant of the Agent Console and displays the customer ID number/customer name column, the Time in Queue column and Department column for customers awaiting chat assistance. |

| Term | Definition |
|---|---|
| **Customer Details Window** | This window is located in the lower right quadrant of the Agent Console when a live chat session is being displayed. The Customer Details window shows custom information on the customer in a live chat session. |
| **Customer Form** | This element of InstantService web-based communications allows a company to collect data from a customer prior to them entering a chat session. |
| **Customer ID number** | This is a unique number generated by the InstantService chat application and applied to a customer requesting a chat session. Depending on how an account is configured, it is displayed in the Customer Session tab instead of the customer name. |
| **Customer Interface** | This interface is what the customer receives after their request for a chat session has been accepted. It is through this interface that a customer chats with an agent. |
| **Customer Login** | This term refers to the process of customer logging in to InstantService. |
| **Customer Name** | This term refers to the name submitted by the customer when requesting a chat session. |
| **Customer Service Representative (CSR)** | An agent who has access and permissions to use the Agent Console for his or her InstantService account. Permission levels are set by the Account Administrator. |
| **Customer URL Button** | This button is located in the lower right quadrant of the Agent Console above the Customer Details window. Selecting this button launches the Customer URL function. |
| **Department Column** | This column is located in the upper right quadrant of the Agent Console under the Chat Queue tab and displays from what department a customer has requested chat assistance. |
| **Department Rights** | These agent level permissions define which departments an agent has transferring or forwarding rights to. |
| **Dismiss Button** | This button is located in the lower right quadrant of the Agent Console below the Customer Details window. It is used to remove a customer from a chat session. |
| **Edit Customer Details Window** | This pop up window is launched from the Customer Details window and allows an agent to edit the information within the Customer Details window. |
| **End Session Button** | This button is located in the lower right quadrant of the Agent Console below the Customer Details window. Selecting this button removes a customer from a chat session and closes the chat session window in the Agent Console. |
| **Escalate** | This term is used to describe the process where an agent finds it necessary to transfer a chat customer to another agent to resolve the customer's request. |

| Term | Definition |
|---|---|
| **Forward Button** | This button is located in the lower right quadrant of the Agent Console below the Mail Message Details window. It is used to forward a mail to another agent or department after an agent has removed the mail from the Mail Queue. |
| **InstantService Chat** | The term referring to the official name of the InstantService chat application. |
| **Integration Window** | This element of InstantService web-based allows a company to integrate their customer database with the Agent Console. It is located in the lower right quadrant on the Agent Console and available for chat and email. |
| **Language Translation** | This InstantService feature produces real-time Latin based character set translations. |
| **Mail Message Details Window** | This window, located in the lower right quadrant of the Agent Console, displays all communications between agent and customer for the active mail incident. |
| **Mail Queue Information Window** | This window is located in the upper right quadrant of the Agent Console below the Mail Queue tab. It displays the From, Received, Subject, and Department information on mail waiting in queue. |
| **Mail Session** | This term refers to the email exchange between an agent and a customer. |
| **Mail Session Tab** | This is the tab for a live mail session that contains its unique incident number. Selecting this tab exposes its live mail session. |
| **Monitor Session Button** | This button is located in the upper right quadrant of the Agent Console below the Chat Session Information window. Selecting this button initiates the monitor function of the Agent Console. |
| **Name Column** | This column is located in the upper right quadrant of the Agent Console under the Chat Queue tab and displays the name that the customer submitted at the time of their request for chat assistance. |
| **New Customer Window** | This pop up window appears when a new customer chat session request enters the Chat Queue. |
| **New Mail Message Window** | This pop up window appears when a new email message enters the Mail Queue. |
| **Panel** | See **Quadrant**. |
| **Personal Response Libraries** | These response libraries are built by an individual agent to facilitate their response process with a customer. |
| **Pre-Scripted Responses** | – This term refers to the Text file entries located within the Response Libraries and created by a company's administrator to standardize agent responses to customers. |

| Term | Definition |
|---|---|
| **Private Message Window** | This is the window that appears after an agent clicks on the Private Message button and allows agents to send private messages to one another. It contains the Private Message Dialog window and the Private Message Text Entry box. |
| **Private Message / Private Messaging** | These terms refer to the element of the Agent Console that allows agents to send private text messages to each other. |
| **Private Message Dialog Window** | This term refers to the window above the Private Message Text Entry box that displays the entire dialog exchanged between agents that are Private Messaging. |
| **Private Message Window** | This window appears when an agent initiates a private message. It is through this pop up window that private messaging occurs. |
| **Private Message Text Entry Box** | This box is located below the Private Message Dialog window and is the location where a private text chat message is entered. |
| **Push Page Button** | This button is located in the lower right quadrant of the Agent Console above the Customer Details window and is used to send a web address to a customer's desktop. |
| **Pushing Web Pages** | This term refers to an agent's ability to push web addresses to a customer's desktop. |
| **Remove From Queue Button** | This button is located in the upper right quadrant of the Agent Console below the Mail Queue Information window. Selecting this button removes a mail message from the Mail Queue. |
| **Response Libraries** | The Response Libraries are located in the upper left quadrant of the Agent Console. It holds three libraries. They are URLs, Text, and Files libraries. |
| **Role** | A group of agents with a common set of permissions. |
| **Select Button** | This button is located in the upper left quadrant of the Agent Console below the Response Library window. This button sends the selected URL, text or file to the Address Entry box. |
| **Send Button** | This button is located in the lower left quadrant of the Agent Console to the right of the text entry box for the Agent Room, or a chat session, or a mail session. |
| **Session Log** | – This term refers to the recorded text chat dialog exchange between an agent and a customer during a chat session. |
| **Session Response Panel** | This panel encompasses the lower left quadrant and the lower right quadrant. It is the section of the Agent Console where the agent interacts with the customer. |
| **Session Response Window** | This refers to the lower left quadrant of the Session Response panel where agents assemble their responses to customers' chat or email requests. |
| **Session** | This term refers to the generic exchange between an agent and a customer that doesn't specify the mode of communication. |

| Term | Definition |
|---|---|
| **Supervisor** | An agent with access and a set of permissions allowing him or her to monitor and join activities of other agents in the Agent Console. |
| **Take Customer Button** | This button is located in the upper right quadrant of the Agent Console below the Customer Chat Queue Information window. It allows an agent to accept a customer out of the Chat Queue. |
| **Take Message Button** | This button is located in the upper right quadrant of the Agent Console below the Mail Queue Information window. Clicking this button opens a mail session in the Agent Console. |
| **Text Entry Box** | This box is located in the lower left quadrant of the Agent Console below the Chat Dialog window of a selected live chat session. |
| **Time in Queue Column** | This column is located in the upper right quadrant of the Agent Console under the Chat Queue tab and displays the time a customer has been in queue waiting for chat assistance. |
| **Transferring** | This term refers to the element of the Agent Console that allows an agent to transfer a chat session customer to another agent. |
| **Transfer Button** | This button is located in the lower right quadrant of the Agent Console below the Customer Details window. It allows an agent to transfer a chat session customer to another agent. |
| **Transfer Customer Window** | This window appears after an agent has initiated a transfer request. This pop up window allows an agent to select the transfer agent. |
| **Transfer Request Window** | This is the window that an agent receives when another agent has sent them a request to transfer a customer to them. Through this pop up window, an agent selects whether or not to accept a transfer customer. |
| **User Name** | This term refers to the name that an administrator designates to an agent. A user name and password are required by agents to log in to the Agent Console. They are also used to access the Account Administration utility. |
| **View Button** | This button is located in the lower right quadrant of the Agent Console above the Customer Details window. It allows the agent to view a web address prior to sending it to a customer's desktop. |

# Appendix 2: InstantService Tokens

| Token Name | Description | Customer Client | Agent Console Chat | Agent Console Mail | Auto-Ack Mail |
|---|---|---|---|---|---|
| [%CSRID%] | Agent CSR ID | | X | X | |
| [%CSRUSERNAME%] | Agent CSR username | | X | X | |
| [%CSRFIRSTNAME%] | Agent first name | | X | X | |
| [%CSRLASTNAME%] | Agent last name | | X | X | |
| [%ACCOUNTID%] | Account ID for Agent or Customer | X | X | X | |
| [%DEPARTMENTNAME%] | Department name for the Agent or Customer | X | X | X | X |
| [%DEPARTMENTID%] | Department ID for the Agent or Customer | X | X | X | |
| [%CUSTFIRSTNAME%] | Customer first name in form or X-IS-CUSTFIRSTNAME | X | X | X | X |
| [%CUSTLASTNAME%] | Customer last name in form or X-IS-CUSTLASTNAME | X | X | X | X |
| [%CUSTOMERID%] | Customer ID | X | X | | |
| [%CUSTREMOTEIP%] | Customer remote IP address | X | X | | |
| [%CUSTEMAIL%] | Customer e-mail address | X | X | | |
| [%CUSTPHONE%] | Customer phone number | X | X | | |
| [%OPTIONALDATALABEL%] | Custom Optional Data label | X | X | X | |
| [%OPTIONALDATA1LABEL%] | Custom Optional Data 1 label | X | X | X | |
| [%OPTIONALDATA2LABEL%] | Custom Optional Data 2 label | X | X | X | |
| [%OPTIONALDATA3LABEL%] | Custom Optional Data 3 label | X | X | X | |
| [%OPTIONALDATA4LABEL%] | Custom Optional Data 4 label | X | X | X | |
| [%OPTIONALDATA5LABEL%] | Custom Optional Data 5 label | X | X | X | |
| [%OPTIONALDATA%] | Optional Data value in form or X-IS-OPTIONALDATA | X | X | X | X |
| [@OPTIONALDATA@] | Required Optional Data value in form or X-IS-OPTIONALDATA | | X | X | X |
| [@OPTIONALDATA<n>@] | Required Optional Data value in form or X-IS-OPTIONALDATA<n> | | X | X | X |

| Token Name | Description | Customer Client | Agent Console Chat | Agent Console Mail | Auto-Ack Mail |
|---|---|---|---|---|---|
| [%OPTIONALDATA1%] | Optional Data value in form or X-IS-OPTIONALDATA1 | X | X | X | X |
| [%OPTIONALDATA2%] | Optional Data value in form or X-IS-OPTIONALDATA2 | X | X | X | X |
| [%OPTIONALDATA3%] | Optional Data value in form or X-IS-OPTIONALDATA3 | X | X | X | X |
| [%OPTIONALDATA4%] | Optional Data value in form or X-IS-OPTIONALDATA4 | X | X | X | X |
| [%OPTIONALDATA5%] | Optional Data value in form or X-IS-OPTIONALDATA5 | X | X | X | X |
| [%TRANSCRIPT%] | Customer chat transcript | | X | | |
| [%MAILMESSAGEID%] | Customer Mail Message ID | | | X | |
| [%MAILMESSAGESUBJ%] | Customer Mail Message Subject | | | X | X |
| [%INCIDENTNUMBER%] | Customer Mail Message Incident Number | | X | X | X |
| [%SENTTO%] | Customer Mail Message Sent To Address | | | X | |
| [%SENTTOALIAS%] | Customer Mail Message Sent To Alias | | | X | |
| [%SENTFROM%] | Customer Mail Message Sent From Address | | | X | |
| [%SENTFROMALIAS%] | Customer Mail Message Sent From Alias | | | X | |

**Note:** The tokens and replacement methods are centrally defined in the following Java class:

`com.sessio.util.ISTokens. java`

# Appendix 3: HTML Tags

In the Agent Console, the following HTML tags are supported in chat sessions:

| Tag Name | HTML Tags | Attributes Allowed |
|---|---|---|
| **Bold** | `<b></b>` | |
| *Italic* | `<i></i>` | |
| Underline | `<u></u>` | |
| Paragraph | <p> | `align` |
| Break | `<br>` | |
| Ordered List | `<ol></ol>` | |
| Unordered List | `<ul></ul>` | |
| List Item | `<li></li>` | |
| Image[1] | `<img>` | `name, alt, height, width, border, align, hspace, vspace, src` |
| Anchor | `<a></a>` | `Href, nohref, rel, target`[2] |

[1]As a best practice, **<img>** (image) tag links used in response libraries should use **HTTPS** (secure HTTP) instead of **HTTP**. This is to prevent warning dialogs from appearing to the customer during a chat session.

[2]The anchor attribute **`target`** accepts only the standard attribute value **`_blank`** or the value **`new`**. If any other attribute value is used, the tag automatically changes to the value **`new`**. When the **`_blank`** value is used, links always open up in a new window or tab. When the **`new`** value is used, links always open in the same window or tab after the first one has been opened.

# Appendix 4: Account Administration Strategies

## Dealing with Abusive Chats

Receiving abusive chats is always a possibility when you provide customers with a free communication method. However, there are strategies you can implement to lower the impact on your agents.

### Quarantine Department

Provide a ***quarantine* department** for the transferring of nuisance customers. This strategy gives your agents something to do with the customer and assists with tracking.

#### Setting up a Time-out department:

4. In Departments: New, create the department for use as a quarantine department, for example, **Time-out**. Do not assign any additional agents to the department. For more information on setting up new departments, go to the xx section.

   **Note:** The name of the department is presented to the customer in the chat window when he or she is transferred, so use care in selecting the name for the department.

5. In Agents: Access: Department Rights, select the agents whom you want to have transfer rights to the Time-out department. For more information on setting up forwarding rights, go to the Department Rights section.

   **Note:** You must edit the transfer rights for each agent.

#### Using the Time-out department:

- When an abusive customer comes in to chat, in the Agent Console, launch the new Time Out agent to open the Time Out queue so agents can transfer the chat into the queue. Once the customer is in the queue, you can close the Time Out agent console.

### Cookie-Based Response

You can also use a cookie based block for abusive chat customers. The agent pushes a page to the customer. When open, the page sets a cookie on the customer machine and automatically closes.

When the customer goes to the website to initiate a chat, the cookie is detected and can trigger any number of actions. For example, you can set the action so that the customer does not see the chat link, or that if they click the chat link, the form that opens gets redirected to a Chat Unavailable page.

For more information, contact the InstantService Support team.

# Appendix 5: Account (Default) Department Configuration Pages

The pages you can use to set up global assignments using the Account (Default) department include:

**Departments: General**

- Name and Language
  - Optional Data Labels
  - Categories
  - Response Libraries

**Departments: Chat**

- Customer Link
- Customer Form
- Customer Interface
- Customer Exit Survey
- Smart Button
- Queue Availability
- Queue Distribution
- Queue Thresholds

**Departments: Mail**

- Incoming Mail Settings
- Outgoing mail Settings
- Mail Routing
- Queue Distribution
- Queue Thresholds

The Account (Default) department does not appear as a choice on the following pages:

- Departments: General: Agent Assignments
- Departments: Chat: Agent Transfer Rights
- Departments: Mail: Agent Forward Rights
- Agents: Access: Department Assignments
- Agents: Access: Department Rights