Canned Replies

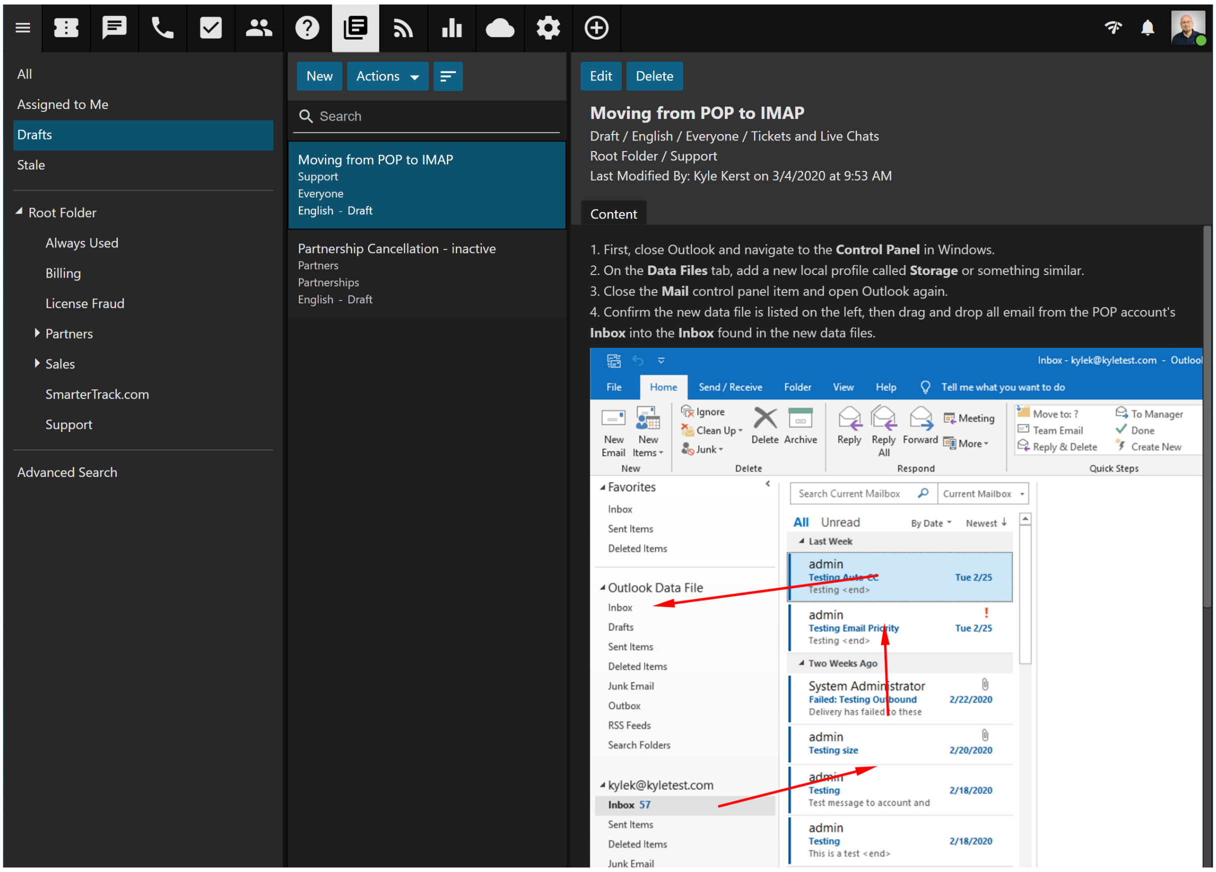
Help Documentation

Canned Replies

Canned Replies Overview

Canned replies are predefined responses for frequently asked questions that can be used to quickly and efficiently respond to tickets and live chats. For example, if a company is experiencing some service interruption, a canned response can be created by management that discretely relays information about the outage, ETA for the service resuming, where to go for more information and more. This makes it easy for front line agents to quickly disseminate information to end users, especially at times when call, ticket and chat volumes can be higher than normal.

To access canned replies, log into the management interface with your agent account. Then click on the Canned Replies icon . All of the canned replies in the root folder that are assigned to a department you belong to will load in the content pane. To view the canned replies that are assigned to your agent account, click on Assigned to Me in the navigation pane.



Navigating Canned Replies

In general, the following details are available for each canned reply in the content pane:

• Title - The title of the canned reply.

• Folder - The location of the canned reply.

• Assigned To - The agent or department to which the canned reply is assigned. This determines which agents or departments have access to the canned reply.

• Flags - Whether the canned reply is flagged as a draft or not.

Performing Canned Reply Actions

In gneral the following options are available from the content pane toolbar:

• New - Creates a new canned reply in the selected folder.

• Actions - Click this button and select the appropriate option to select all canned replies, move canned replies, copy canned replies or change the status of canned replies.

• Select All - Selects all canned replies in the content pane.

• Delete - Deletes the selected knowledge base articles. For more information, see Deleting Canned Replies .

• Mark - Click this button and select the appropriate option to change the status of (or "flag") the selected canned reply(s).

• Public - Marks the canned reply as public. Public canned replies are visible to administrators and agents.

• Draft - Marks the article as a draft. Drafts are only visible to administrators and agents.

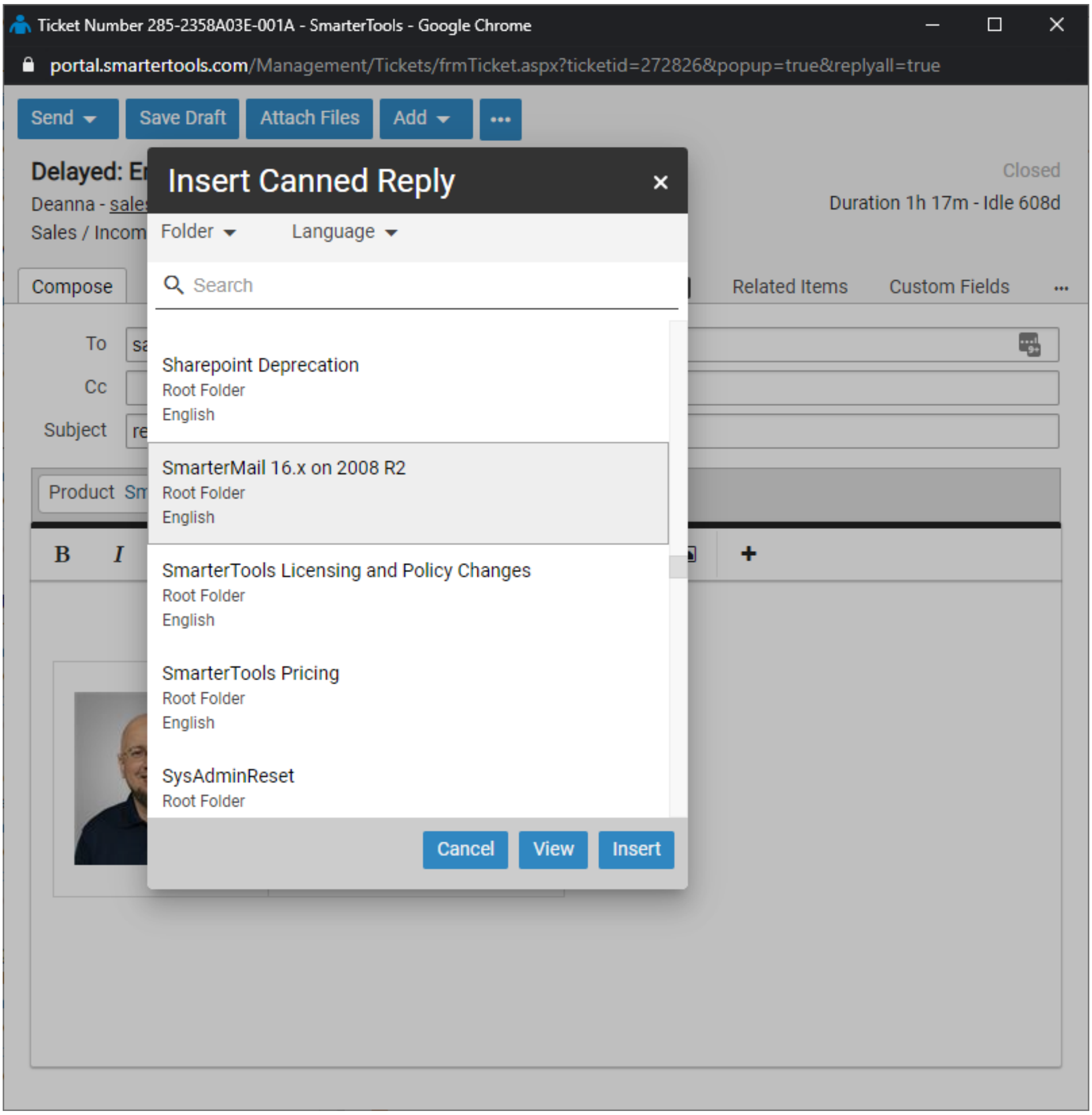
• Move - Moves the selected canned reply(s) to another folder.

• Copy - Copies the selected canned reply(s) to another folder.

• View - Refresh - Click this button to force a refresh of the canned replies displayed in the content pane.

Using Canned Replies

As mentioned, Canned Replies can be inserted into ticket replies as well as during a Live Chat. Regardless of where you use Canned Replies, they're inserted into replies the same way:



• When in a live chat or replying to a ticket, click the Actions (...) menu.

• From the dropdown menu, click Insert Canned Reply . This will load the Canned Replies modal window which lists the available canned replies you can use.

• Click on the Title of the canned reply you want and its contents will load. To insert it into your chat, simply click the Insert button. (Alternatively, you can double-click the desired canned reply and it will be pasted into your messages text box.)

• If need be, you also have the ability to edit the canned reply prior to inserting it into your live chat.

• Once the reply has been added, you can add to it or simply send it along as your response.

Creating New Canned Replies

To create a new canned reply, click the new item icon and then click Canned Reply . Alternatively, agents can click New at the top of the content pane. Either action will open a new canned reply window that the agent will use to create the canned reply.

The new canned reply window contains a tab to compose the reply, a tab to set reply options such as the default language to use and whether the reply should be available for live chats and/or tickets, and a history tab that contains information on the article's creation date and any review or modification dates.

Compose Tab

This is where you actually create the canned reply. The Compose tab includes a what-you-see-is-what-you-get (WYSIWYG) editor that will allow you to create stylish, HTML-formatted replies. The following fields will appear on the Compose tab for any new article:

- Title - Type the title of the canned reply in this field.
- Folder - To specify the folder in which this canned reply should appear, select the appropriate folder from the list.
- Assign To - If you want a canned reply to ONLY be available to specific agent, or to a specific department, then select your choice from this drop down. If the canned reply should be availalble to everyone, that can be set as well.
- Flags - In order to flag the canned reply as a draft, check the appropriate box. For more information, see Canned Replies Overview
- WYSIWYG Editor - This is where the article is created.

To compose the canned reply, type the text of the reply in the large editing box below the canned reply header. Agents can change the formatting using the WYSIWYG editor.

Options Tab

The following options are available in the options tab of the new article window:

- Language - To specify the language, select the appropriate language from the list.
- Canned Reply Type - To specify whether the canned reply can be used for tickets and live chats, tickets only, or live chats only, select the appropriate option from the list.

The following options are available in the toolbar of the new article window:

- Save - Saves the contents of the canned reply.

History Tab

The History tab shows agents the full history of the reply, including the initial creation date, when an article was reviewed, when it was modified and more. The information available includes the name of the agent who performed the action so that any follow up can occur, as needed.

Managing Canned Reply Folders

Canned replies are stored and organized using folders. For example, a company may organize all of the canned replies related to billing in one folder and canned replies related to promotional offers in another folder.

Creating Canned Reply Folders

To add a new folder, click the menu icon at the bottom of the navigation pane and click Add Folder This will open a new folder window with the following fields:

- Folder - The name of the new folder.
- Parent Folder - Select a parent folder from the list. Since folders are organized by a hierarchy, the new folder will be a subfolder of the parent folder.

Click Save .

Moving Canned Replies to Another Folder

Moving canned replies between folders in SmarterTrack is easy. First, open the folder containing the article(s) you want to move. Then select the desired article(s). Click the Actions menu in the content pane toolbar and click Move . Then select the name of the destination folder and click OK .

Renaming and Deleting Folders

Agents can change the name of a canned replies folder anytime or delete it completely if it is no longer needed.

To rename a folder, select the appropriate folder in the navigation pane. Click the menu button at the bottom of the navigation pane toolbar and click Edit Folder . In the Folder field, type the new folder name and click Save .

To delete a folder, select the appropriate folder in the navigation pane. Click the menu button at the navigation pane toolbar and click Delete Folder . Then click OK to delete the folder and all of its contents.

Viewing Canned Replies

To view a canned reply, simply click a canned reply and it will display in the preview pane. If you would rather view the canned reply in a popup window, double-click the canned reply instead. Note: Double-clicking a canned reply also enables you to edit the canned reply.

In general, the following options are available from the preview pane toolbar:

- Save - Edits the selected canned reply.
- Delete - Deletes the selected canned reply. For more information, see Deleting Canned Replies .

Tabs within a Canned Reply

Canned reply information is organized within the following tabs:

- Compose - The text of the knowledge base article.
- Options - This tab includes the language used for the reply as well as where the reply can be used within SmarterTrack.
- History - This tab includes all information pertaining to the article, including creation date, modified date, and the number of unique views and hits.

Deleting Canned Replies

On occasion, an agent or administrator may need to delete a canned reply from the system. Note: The ability to delete a canned reply is determined by the role permissions. By default, agents can delete canned replies. For more information, see Roles .

To delete a canned reply, simply select the desired canned reply(s) in the content pane. Then click Delete in the content pane toolbar. Alternatively, agents can delete a canned reply they are currently viewing by clicking Delete in the preview pane toolbar. Regardless of the method used, when an agent deletes a canned reply they are presented with a confirmation dialog. Once a canned reply is deleted, it is no longer available for review or action and will eventually be purged from the system. Note: Deleted items are purged from the system every 90 days. Items purged from SmartrerTrack are no longer indexed and will not return as results when using Advanced Search.

Searching Canned Replies

There are two methods an agent can use to search for a news item: basic search or advanced search.

Basic Search

To perform a basic search, type the search criteria in the search bar located near the top of the content pane. Then click the magnifying glass or press Enter on your keyboard. SmarterTrack will automatically search the canned replies section you are viewing (i.e. a specific folder, status, etc.) for matches and display the results in the content pane.

Advanced Search

Employees can set more specific search parameters by using the advanced search function to search for an article. To perform an advanced search, click the canned replies icon . Then click Advanced Search in the navigation pane.

Advanced searches use the "and" modifier for combining phrases and fields to construct the search. Search results are displayed based on the overall weight of the results returned.

The following fields are available:

- Search String - Type the specific keywords to be queried.
- Folder - To search by root folder, select the appropriate folder from the list.
- Assigned To - To search by the agent or department to which the canned reply is assigned, select the appropriate option from the list.
- Flags - To search by flag, select the appropriate status from the list.
- Creation Date - To search by the creation date of the canned reply, enter the start and end dates in these fields or click the calendars and select the appropriate dates.
- Last Modified Date - To search by a date range during which canned replies were edited, enter the start and end dates in these fields or click the calendars and select the appropriate dates.
- Max Results - To specify the maximum number of search results displayed, select the appropriate number of results from the list.