



Live Chat

Help Documentation

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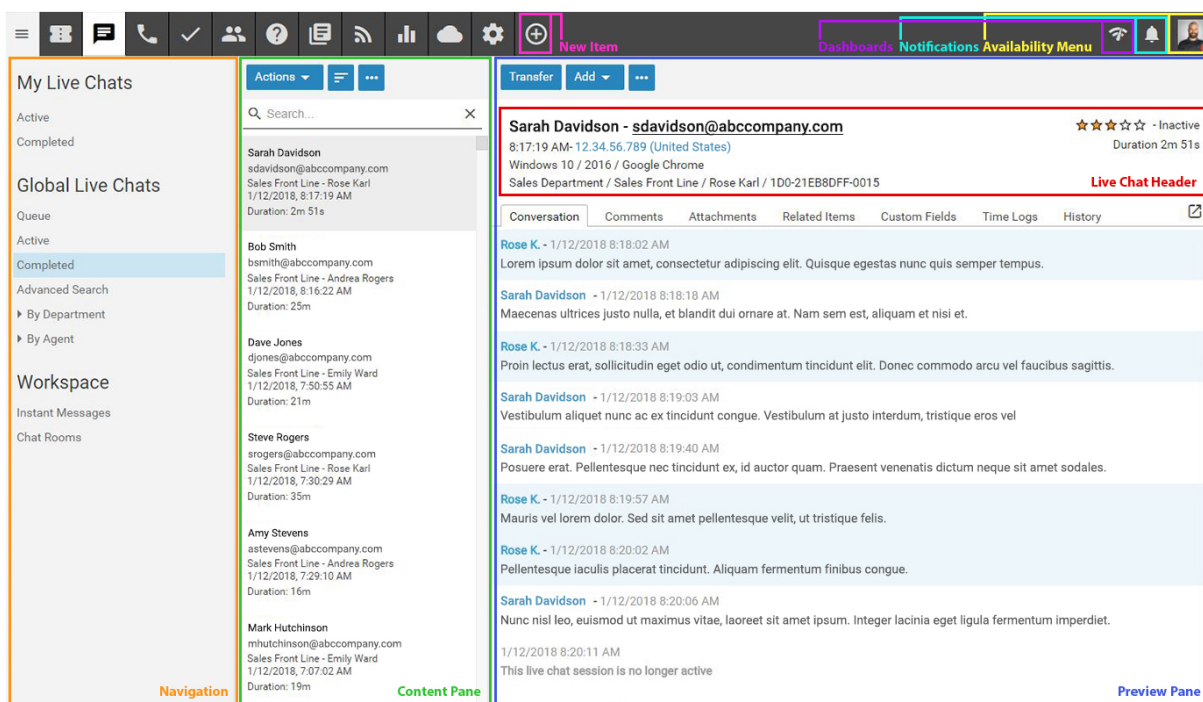
Live Chat Overview

SmarterTrack's live chat feature gives businesses the ability to reduce phone calls, improve customer support and assist more customers concurrently. (E.g., via live chat, tickets and phone calls).

Customers can initiate live chats via the portal or directly from your website using customized live chat links. As agents receive live chat requests, SmarterTrack suggests solutions from relevant knowledge base articles and ticket resolutions, thereby reducing research time and improving overall response times. To access your live chats, log into SmarterTrack as an agent and click the live chat icon. Depending on the role you are assigned, only My Tickets will load or My Tickets and Global Tickets will load.

On the user's end, as they initiate the live chat process, after their initial questions is submitted they are presented with an intermediary page that lists a number of suggested solutions from relevant knowledge base articles within SmarterTrack. This can help keep support functions streamlined and concentrated by allowing the customer to see potential resolutions to their issues before the chat is submitted to an agent.

To better understand the different areas of live chats, please refer to the diagram below:



For more detail on the live chat interface, see the View Chat section of help.

Navigating SmarterTrack's Live Chat Interface

My Live Chats vs. Global Live Chats

The My Live Chats section organizes all of the live chats for which an agent is responsible. When an agent accesses My Live Chats by clicking on it in the navigation pane, all active live chats for the agent will load in the content pane. My Live Chats also gives agents the ability to see any inactive chats that they have previously had with end users.

In addition, the My Live Chats section organizes chats by group. That means that every group the agent is active in will be listed and the agent can drill down into each group to see their active and inactive chats.

Administrators and managers who are members of multiple groups may want to view active and/or inactive live chats for those groups to better evaluate the actual needs of the organization or to gain valuable insight into company operations. To view all live chats in SmarterTrack, an agent, manager or administrator MUST be a member of all groups within SmarterTrack. At the very least, they need to be members of multiple groups in order to see live chats for those groups. Once this is done, they simply click Global Live Chats in the navigation pane.

Regardless of whether you're accessing My Live Chats or Global Live Chats, all active and inactive chats in the system will load in the content pane when you open the respective live chat section. In general, the following columns will be available, though you can modify which columns appear, as well as the column widths, as needed, using the View menu:

- **Checkbox** - Use these boxes to select multiple chats. Live chats must be selected before choosing an action from any toolbar.
- **Status** - The current status of the live chat and whether a follow-up was scheduled or not.
- **User** - The name the customer would like to be called during the chat.
- **Group** - The group to which the live chat was assigned.
- **Started** - The date and time the chat originally started.
- **Queue Time** - The amount of time the live chat was in the queue before it was taken by, or assigned to, and agent.
- **Idle** - The amount of time that passed since an agent sent a message within the chat. Note: Idle time does not reset when a customer sends a message.
- **Messages** - The number of messages within the chat.
- **Agent** - The name of the agent assigned to the chat.

Sorting

Clicking on any column header allows you to sort that column in either ascending or descending order. Final sort order uses the chat's idle time as the deciding factor. For example, 3 chats from the same customer will sort from least idle to most idle, or vice versa, when sorting the User column in either ascending or descending order.

Performing Live Chat Actions

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

- **Actions** - Click this button and select the appropriate option to select all chats, pull a live chat from the queue or transfer a live chat. Setting options such as Status, Follow-up and Idle Time will display as icons in the Status column of the content pane. Each icon will have a color assigned based on the severity level of the setting. Generally, colors denote the following:
 - Grey - No idle time issues.
 - Green - Active status or normal idle.
 - Yellow - Idle warning.
 - Red - Closed/inactive status, high idle warning.
- **Select All** - Selects all chats within the content pane.
- **Transfer** - Transfers the selected chat(s) to another group or agent. For more information on transferring a live chat, see [Transferring Live Chats](#) .
- **View** - Click this button and select Visible Fields.
- **Visible Fields** - This option allows you to choose which columns are displayed in the navigation pane. You are also able to set the column widths for each item that displays, allowing you to conform your content pane to fit any standard screen resolution. Each column has a default width specified, but these defaults can be modified as needed.
- **Delete** - Click this button to delete the selected live chat(s). For more information on deleted chats, see [Deleting Live Chats](#) .

Live Chat Distribution Methods

There are two basic distribution methods for live chats: the default distribution and Round Robin distribution, and the method used is determined by administrators when configuring the Live Chat settings. On the Options tab in the Live Chat settings, if the box next to "Distribute chats via Round Robin" is checked, then that distribution method will be used. If it is unchecked, live chats will follow the default distribution model.

Default Distribution

Also known as "cherry picking," under the default distribution method, all live chats are directed to the queue and agents must manually select the live chats to participate in. This model is typically preferred by smaller companies with lower volumes of live chats.

Administrators that choose this distribution method should note the following:

- Live chats are never assigned to agents automatically.
- An audible alert will notify agents when a live chat is in the queue. The basic notification sound can be configured in the same manner as the other chat sounds.
- If there are no agents receiving live chats, the system will treat chat as offline.

Round Robin

Most companies will use this distribution method for live chats because it attempts to give all of the agents an equal percentage of the workload. Under this distribution method, each agent has a maximum number of live chats that he/she can work on at a time. When a new live chat is initiated, the system checks the active agents within the live chat group to determine which agents have not met their maximum limit. The live chat is then assigned depending on the number of live chats the agent is working on and the amount of time that has passed since a live chat was last assigned to the agent.

For example, assume a company has three agents, Joe, Bob, and Sue. Sue is very experienced and can handle up to five chats at once. Joe and Bob are relatively new, and can handle one and two simultaneous chats at once. If none of the agents are engaged in a live chat when a new live chat is initiated, the system will perform the following checks to determine which agent will receive the live chat:

- The system will first check to see who has the lowest percentage of capacity.
- The system then checks to see which agents have the lowest number of live chats.
- Finally, the system checks to determine which agent has the earliest Last Chat Ended time.

So in the example above, the agents with the lowest percentage of capacity are Sue, Bob, Joe. All of the agents have the same number of live chats (none), but the most time has passed since Joe participated in a live chat. Therefore, the system will assign the live chat to Joe.

Active Live Chat Groups

Departments are broken into divisions called groups. For example, a support department may have level 1 support (less experienced support agents), level 2 support (more experienced support agents), and support management groups. Each group may have different permissions assigned to it, giving organizations the ability to assign agents within a single department varying access to information.

In addition, each agent within the group has a status of active or inactive. Active status indicates that the agent can be assigned tickets and/or live chats. An agent with an inactive status cannot be assigned tickets and/or live chats. Managers can view and edit the status of agents within each group from the Active Live Chat Groups area of the live chats section of the management interface.

The Active Live Chats Groups page gives managers the ability to view the following information:

- A list of all agents
- The status of each agent
- The number of active live chats assigned to each agent
- The number of active live chat groups
- The total number of live chat groups that the agent belongs to

To access this information, click the live chat icon , then click Active Live Chat Groups in the navigation pane.

To change the status of an agent, select the agent and click Edit in the content pane toolbar or double-click a specific agent.

Viewing Live Chat

To view a live chat, simply click the desired chat and it will display in the preview pane. If you would rather view the chat in a popup window, double-click the chat instead. Note: Agents can also configure SmarterTrack so that new chats automatically open in a popup window when they are received. For more information, see My Preferences .

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

- End Chat - Ends the live chat session.
- Take - Allows an agent to take a live chat, either from the queue or from another agent, and begin actively replying to the end user.
- Transfer - Transfer the live chat to another group or agent.
- Add - Click this button and select the appropriate option to add a comment, task, file, time log, call log or other related item to the live chat.
- Comment - Adds a note or a resolution to the live chat. When an agent adds a resolution to a chat, this information is stored in a searchable database that can be used to quickly and efficiently resolve a live chat issue.
- Task - Attaches a new task to the live chat. When an agent adds a task to a chat, this information is stored in the Related Items tab and appears in the Tasks section of the management interface.

- Time Log - Attaches a new time log to the chat. When an agent adds a time log to a live chat, this information is stored in the Related Items tab.
- Ticket - Attaches a new ticket to the chat. When an agent adds a time log to a live chat, this information is stored in the Related Items tab.
- Related Item - Adds an existing ticket to the chat. When an agent adds an existing item to a live chat, this information is stored in the Related Items tab.
- Actions - Click this button and select the appropriate option to perform any manual events created for live chats.
- Insert Canned Reply - Allows the agent to choose from a list of canned responses. To choose a canned response, simply double-click the desired response and it will be automatically inserted in the live chat response.
- Spell Check - Allows the agent to check the spelling of the chat responses they're typing up prior to sending the response to the end user.
- Send File - Allows the agent to send a file, like a screenshot or a document, to the person they're chatting with.
- Email Transcript - Allows the agent to send an email of that contains the text transcript of the conversation.
- Assistance - Click this button and select the appropriate option to view relevant knowledge base articles or ticket resolutions or to get assistance from another agent.
- Manual Event - If there are manual events set up for live chats, they will appear at the bottom of the Actions menu. Otherwise, 'No manual events available' will appear.
- Knowledge Base Articles - Displays a list of knowledge base articles that may be related to the selected live chat. Agents can use search terms to find the knowledge base article that best relates to the chat.
- Instant Message - Allows the agent to IM another agent, supervisor or administrator that is logged into SmarterTrack. Using the Instant Message features allows an agent to get assistance from another agent, a supervisor or someone else within the company.
- Close - Closes the live chat. Note: If the live chat is active, clicking Close will close the active chat and disconnect the users. Therefore, it's not a good idea to close active chats without first ending the chat with the customer.
- Print - Allows the agent to print the information contained in the chat, custom fields, and details tabs of the live chat. Note: If viewing the management interface from a mobile device, this option may not be available.

Tabs within the Live Chat

Live chat information is organized within the following tabs:

- Conversation - This displays the text of the live chat as well as any custom fields being used.
- Comments - This tab displays any comments agents would like to note about the chat or customer. Comments are only visible to agents.
- Attachments - This tab lists any files that were uploaded to the chat by an agent or customer.
- Time Logs - This tab lists any time logs attached to the live chat.
- Related Items - This tab lists any tickets, time logs, tasks or files attached to the ticket.
- Custom Fields - This tab includes any custom fields the administrator created to help customize your company's chats. This information can be populated by a user, an agent, or a third-party application (via the administrator).
- History - This tab summarizes any actions associated to the chat.
- Survey - This tab displays any completed surveys that are associated with the live chat, including their completion date and eventual rating. Users can double-click on the survey to bring it up in a new window.

Viewing the Live Chat Header

Looking at the primary live chat interface diagram , you'll see a section labeled "Live Chat Header". There are several critical pieces of information contained within the live chat header as well as some actions available for a user's email address that should be discussed.

A live chat's header is laid out as follows:

- Line 1 : Live Chat Number - Chat Status - Location Information
- Line 2 : User (User's Email Address) - Date/Time Live Chat Submitted - Chat Duration
- Line 3 : Department Assigned/Group Assigned/Agent Assigned/Survey Rating

Regarding the User and the User Email Address, in many instances you'll notice the user's email address has a dotted underline. When you mouse over an email address with a dotted underline, a couple of options appear:

- User Details - User Details will open a pop-up window that displays a variety of data about the user. For example, the user's role in SmarterTrack, a list of any tickets started from that email address, any live chats started from that email address, any call from a user with that email address and if any custom fields are associated with the user, those are displayed as well. Also available are tabs for ticket history and customer statistics, which includes information on the number of tickets, live chats, calls and time logs over specific periods of times. Custom fields can be associated with any user, and, if present, any agent or manager can view them by selecting "User Details" from the email address mouseover.
- Edit Email Address - This allows you to edit the email address for future correspondence on this live chat.

Viewing Live Chats by Status

Generally, live chats are organized into different sections depending on whether they are active or inactive. To view live chats by status, click the live chat icon , expand Global Live Chats or My Live Chats in the navigation pane and select the desired status. All live chats with the selected status will load in the content pane.

Viewing Live Chats by Brand

To view live chats by brand, click the live chat icon and click the appropriate brand in the navigation pane. All active live chats for the selected brand will load in the content pane. Agents can also expand the brand and select the type of live chats they want to view (options include active and inactive chats). Expanding the brand also allows agents to view chats by department or group. Note: Agents can only view the live chats for which they are responsible. Managers can only view the live chats for the groups/departments in which they belong.

Viewing Live Chats By Agent

To view live chats by agent, click the live chat icon , expand By Agent and click the appropriate agent in the navigation pane. All active chats for the selected agent will load in the content pane.

Administrators can also expand the agent and select the type of live chats they want to view (options include active and inactive chats). Note: The ability to view live chats by agent is only available to managers using installations with less than 500 agents. In addition, managers can only view the live chats for the groups/departments in which they belong.

Transferring Live Chats

On occasion, an agent may need to transfer a live chat to another agent or group. There are various reasons why a chat may be transferred. For example, a level 1 tech support agent may need to escalate the chat to a more experienced level 2 agent for resolution. Another example is an incorrectly categorized live chat, such as a support chat that was incorrectly submitted as a sales chat, that needs to be rerouted to the correct department. Note: The ability to transfer live chats is determined by the role permissions. By default, agents can transfer live chats. For more information, see Roles .

To transfer a live chat, select the live chat and click the Actions menu in the content pane toolbar and click Transfer . Alternatively, you can click Transfer in the preview pane toolbar if you are viewing the live chat in the preview pane. This will open a pop-up window with the following fields:

- New Brand - The primary brand the chat should be transferred to.
- New Group - Select the group to which the chat should transfer from the list.
- New Agent - Select the agent to which the chat should transfer from the list. If the chat does

not need to transfer to a specific agent, choose the auto-assign option and the chat will be assigned to an agent within the specified group based on the distribution method set by the administrator.

- Transfer Comment - Type any important information or comments regarding the transfer into this field. Generally, transfer notes describe actions taken and/or the reason the live chat was transferred.

Click OK to transfer the live chat. Note: When a live chat is transferred, idle time is not reset for the new agent.

Live Chats in Queue

On occasion, live Chats are directed to the queue instead of an agent. Generally, there are three reasons why this occurs:

- In order for a live chat to be assigned to an agent, the agent must be logged in to SmarterTrack and the agent's status must be set to receive chats for the corresponding group. If all agents either are logged out or are not receiving chats, the chat will be directed to the queue. Note: If all agents stop receiving chats at logout, the live chat icon on your site will indicate that chat is unavailable. This will prevent chats from filling the queue during non-business hours.
- Administrators have the ability to set live chat limits for agents. If that limit is reached, new live chats will be sent to the queue until an agent's workload falls below the set limit. For example, to prevent a company's agent workload from getting out of hand, the administrator may set SmarterTrack to limit agents to five active chats. Once an agent's active chats load falls below five, the system will assign additional live chats based on the chosen distribution method.
- If a group is set with the Round Robing Pull From Queue live chat distribution method, chats will sit in the queue until selected by an agent versus being automatically assigned to an agent.

By default, users who are waiting in the Queue will see a message with a count of the number of users ahead of them. However, that message can be customized at the live chat Departments settings .

For information about how SmarterTicket assigns live chats from the queue, see Live Chat Distribution Methods .

Deleting Live Chats

On occasion, an agent or administrator may need to delete a live chat from the system.

To delete a live chat, simply select the desired live chat(s) in the content pane. Then click Delete in the content pane toolbar. Alternatively, agents can delete an inactive chat they are currently viewing by

clicking Delete in the preview pane toolbar. Regardless of the method used, when an agent deletes a chat they are presented with a confirmation dialog. Once a live chat 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 SmarterTrack are no longer indexed and will not return as results when using Advanced Search.

Searching Live Chats

As time passes, finding a specific live chat can become increasingly difficult. Fortunately, SmarterTrack's search tool allows employees to find chats quickly and easily.

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 within the area of the live chat section you are viewing (i.e. active, inactive 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 a live chat. To perform an advanced search, click Advanced Search in the navigation pane. The search options will load in the content 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.

General Criteria

The following fields are available:

- Search In - This dropdown allows you to select either all live chats EXCEPT deleted ones or to only search in deleted items.
- Chat Number - To search by chat number, enter the chat number in this field.
- Search String - Type the specific keywords to be queried. All sections of the chats will be searched for these keywords.
- Email Address - To search by email address, enter the email address in this field.
- Customer Name - To search by customer, enter the customer's name in this field.
- Customer Username - To search by username, enter the customer's username in this field.
- Date Range - To specify the length of time the search encompasses, enter the start and end dates in these fields or click the calendars and select the appropriate dates.

- Group - To search by group, select the appropriate group from the list. Groups listed are organized by department.
- Agent - To search by agent, select the appropriate agent from the list.
- Status - To search by chat status, select the appropriate status from the list.
- Sort Results - To specify whether older or newer results should be displayed first, select the appropriate item from the list.
- Max Results - To specify the maximum number of search results displayed, select the appropriate number of results from the list.

Note: To make searching faster, try limiting the date range.

Custom Fields

The administrator can create an unlimited number of custom fields, which can be used to further define search criteria. For help with custom fields, consult your administrator.

Instant Messenger Overview

SmarterTrack's instant messaging (IM) feature is different from live chat as instant messaging is internal to your help desk and promotes collaboration by allowing an agent to seek guidance from another, more experienced agent. This feature is useful when an agent needs clarification or help resolving a customer issue, but does not need to transfer a chat or ticket to another agent or supervisor.

Navigating Your Instant Messages

Agents and administrators can access Instant Messenger by clicking the live chat icon and then clicking Instant Messages in the navigation pane. (Under Workspace) A list of active IMs will load in the content pane.

Instant Messages are persistent and ongoing. So, a message started with an agent will remain within SmarterTrack. Most recent message threads will always appear at the top, with their last message date and time being displayed, along with the particular agent listed. Simply clicking on the thread opens it in the content pane and messages can be reviewed or discussions continued or restarted with the agent.

Joining Instant Messenger Conversations

Agents can create a new instant message conversation by clicking the new item icon and then selecting Instant Message from the dropdown. They can also click on the Live Chat icon and click on Instant Messages under Workspaces, then clicking the New > button in the content pane. Regardless of how the instant message is started a new IM window with the following fields will open:

- Agent - Select the agents you want to add to the IM thread from the dropdown list. Once all agents have been added, click the OK button.

To start the IM, simply type a message in the Message area and use the Return key on your keyboard to start the conversation. The agent you're starting the IM with will have a pop-up window appear with your name and message. They can then reply from the pop up or open the IM area and reply from within the main interface.

Agents can also join any active IM to which they have been invited, even if they previously ignored or rejected the IM. To join an IM already in progress, select the IM and click the Join button in the content pane toolbar or preview pane toolbar. This will open the IM in a pop-up window.

Chat Rooms

While temporary agent conversations are hosted via instant messenger, some companies may want to conduct virtual meetings with employees. In this case, the administrator may create permanent chat rooms to host agent conversations. Chat rooms allow multiple different agents to join in group-level, department-level or even company-level conversations versus the one-on-one type of conversation handled via instant messenger.

To view a list of permanent chat rooms, click the Live Chat icon . Then, under Workspace in the tree view, click on Chat Rooms. A list of the various rooms you have access to will appear in the content pane.

Chat rooms function, more or less, identically to instant messages. The main difference, however, is that chat rooms can have different participants: not just agents, but entire Departments, whole Groups or individual Roles. (Instant Messages are just between one or more agents.) For more information, see Instant Messenger Overview .

The following options are available from the content toolbar:

- Chat Room - This tab displays the conversation, in real time, between the Room's participants.
- Participants - Displays the agents who are actively participating in the chat room.
- With Access - This lists the agents who can participate in the chat room, based on how the permissions were set when the chat room was created.

Starting a Chat Room

Starting a Chat Room is very easy: Simply click on Chat Rooms from the tree menu, then click the New button in the content pane. Once you do, a modal window opens. The modal contains the following fields:

- Name - This is the name of the chat room as it will appear in the content pane. For example, Support Chat or Marketing Chat.
- Add Permission - This dropdown allows you to select an entire Department, a Group or even individual Roles as the participants in the room. You can add more than one of each, or a variety of them all as participants in the room. Each permission you add will be listed at the bottom of the modal, and you can remove permissions by simply clicking the X next to the permission name.

Once you've added a Name and set the participants, click the Ok button to start chatting!