Viewing Live Chats

Help Documentation

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.
- 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.

• 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.

• 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.

• Spell Check - SmarterTrack allows agents to spell check their responses prior to sending it to the user. Click this to spell check your response.

• 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.