



AGENT TRAINING USER GUIDE

Instant Chime for Slack

October 2019

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Introduction

This document is designed to help those who are configured as agents in the process of learning how to use Chime for Slack. We will provide information on how to accept chat requests from guests, viewing the agent dashboard and individual chat history, directions on how to use the Agent commands give you access to After Chat Work Mode, Standard Replies, Priority Pass, and more.

Accepting a Chat Request

As an agent who will be helping guests in Chime, you will be prompted in your Slack client with notifications of requests. To accept requests, you must be signed in to your Slack client and your status must be available. All chat requests will be sent to you through a Slack Channel that your organization has created. You will want to monitor this channel so see any new chat requests.

Follow these steps to accept a chat request:

1. **Click on the “Pick Chat” button** when a new chat session appears in the Slack Channel. This will accept the chat session and connect you with the guest. You will receive a Direct Message from one of the Chime Bots on the left hand side of the Slack Client

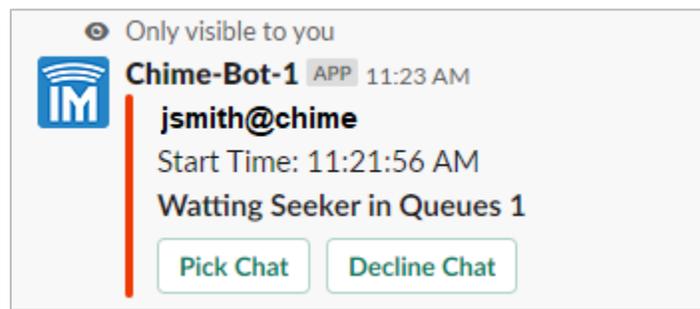


Figure 1: Incoming Request

2. Click on the chat conversation you received a notification for. The initial message you receive from Chime should similar to the one shown below (Figure 2)



Figure 2: Chat Connected

3. You are now connected with the guest. You should see the guest's question, and you can now chat with the guest.

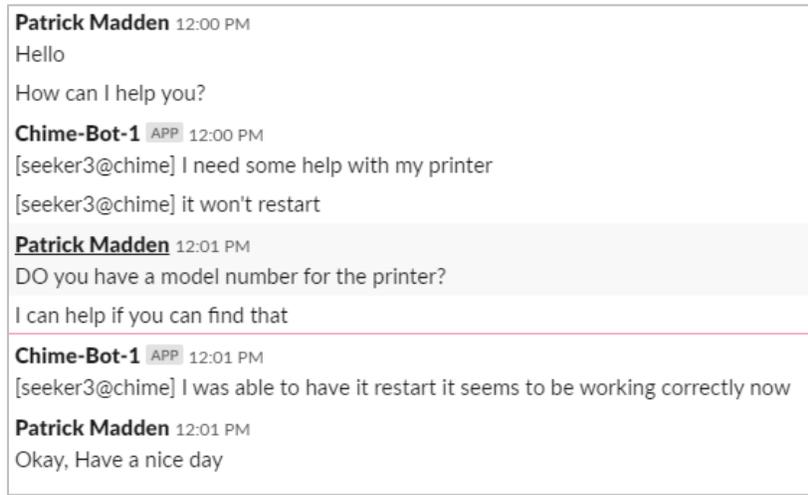


Figure 3: Conversation with a Guest

Agent Commands

Agents using Chime have many different features available to them in the Slack client. In Chime, these features are called **Agent Commands**. To use Agent Commands, you simply enter the command you want to use and send the message in the chat conversation or in the Chime Notifications Slack channel.

All Agent commands begin with “/chime” then the name of the command. If you type in “/chime” in to the message box, a menu of all possible Agent Commands will appear allowing you to pick the command instead of typing the entire thing or remembering the names of each one.

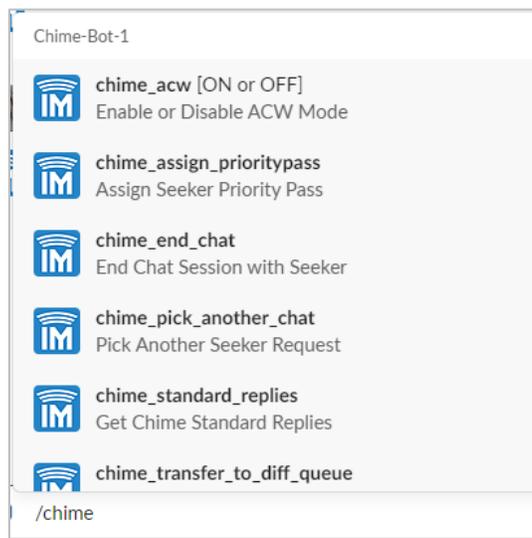


Figure 4: List of Chime Agent Commands

End a Chat Session

The command to end a chat session is the most important of the Agent Commands. After each chat session has reached its conclusion, either the agent or the guest must end the chat session. This command only works in the chat session that you are connected to, if entered in the Chime notification channel, it will have no effect.

To use the End Chat Session command:

1. Type the command `/chime_end_chat` in the chat session or pick it from the list of Chime commands
2. Enter the command into that chat session. You will receive a message saying the Chat has been ended. At this point the chat session you were in is completed and you are able to accept another chat session.



Figure 5: End a Chat Session

Pick Another Chat

The pick another chat command can be used by agents to accept a new chat session. This can be used for handling multiple chat sessions at once, or for accepting a new chat session after a different chat session has ended. This command must be used in the notification channel and not in chat sessions. If used in a chat session the command will have no effect.

To use the Pick Another Chat command:

1. Type the command `/chime_pick_another_chat` in the notification channel or pick it from the list of Chime commands
2. Enter the command into the notification channel. Chime will notify you that the command has been received and a new chat session will be accepted if there are any currently waiting.

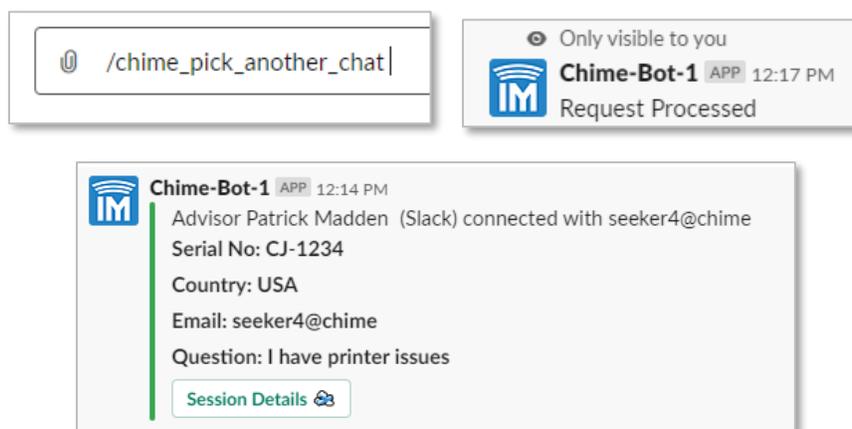


Figure 6: Accepting a New Chat Session

Get Standard Replies

The Get Standard Replies command can be used by agents to use any of the Standard Replies assigned to the Queue that the chat is in. Standard Replies are a set of messages and phrases that can be sent to the guest to prevent typing out the same phrase every time. This command must be used in the chat session and not in notification channel. If used in a notification channel the command will have no effect.

To use the Get Standard Replies command:

1. Type the command “/chime_standard_replies” in the chat session or pick it from the list of Chime commands.
2. Enter the command into the chat session. Chime will open up a modal that lets you pick the Standard Reply that you want to send.



Figure 7: Enter the Standard Reply Command

3. Chose a standard Reply from the dropdown menu.
4. Click the **Submit** button to send the Standard Reply to the guest

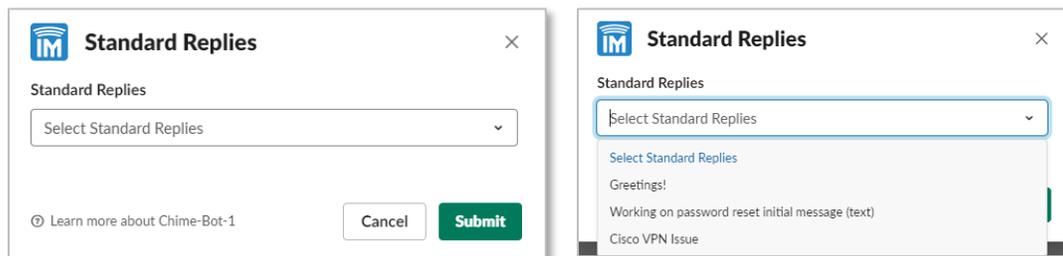


Figure 8: Sending Standard Replies

Transfer to Different Queue

The Transfer to Queue command can be used by agents to move a guest to a different queue if they route into a queue and should be in a different queue. This command must be used in the chat session and not in notification channel. If used in the notification channel the command will have no effect.

To use the Transfer to Different Queue command:

1. Type the command “/chime_transfer_to_diff_queue” in the chat session or pick it from the list of Chime commands.
2. Enter the command into the chat session. Chime will open up a modal that lets you pick the Queue that you want to transfer the guest to.

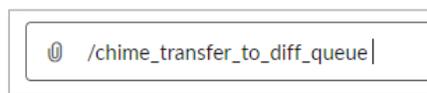


Figure 9: Enter the Transfer to Queue Command

3. Choose the Queue that you want to transfer the guest to.
4. Click the Submit button to transfer the guest to a new queue where they can route to another agent.

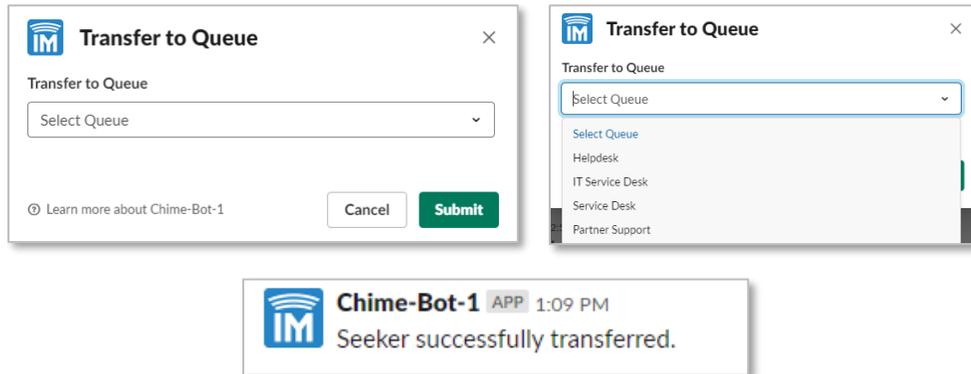


Figure 10: Transferring a Guest to Another Queue

Assign Priority Pass

The Priority Pass command can be used by agents to give guests a pass that will send them to the front of the line when routing into the queue on their next chat session. This can be used if a guest needs to come back in for support after trying something, or if the guest is not available when the chat is connected and the agent needs to accept another chat session. This command must be used in the chat session and not in the notification channel. If used in the notification channel the command will have no effect.

To use the Assign Priority Pass command:

1. Type the command `/chime_assign_prioritypass` in the chat session or pick it from the list of Chime commands.
2. Enter the command into the chat session. Chime will notify you that the command was successful and notify the guest that they have been assigned a priority pass.

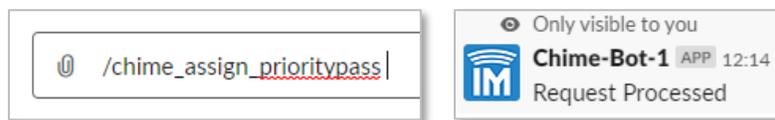


Figure 11: Assigning a Priority Pass

Wait for Reboot

The Wait for Reboot command can be used by agents to allow guests to restart their chat session and reconnect to the chat session immediately. This is useful if the guest needs to restart their Slack client, computer, or web browser to solve the issue they are having. This command must be used in the chat session and not in the notification channel. If used in the notification channel the command will have no effect.

To use the Wait for Reboot command:

1. Type the command “/chime_waiting_for_reboot” in the chat session or pick it from the list of Chime commands.

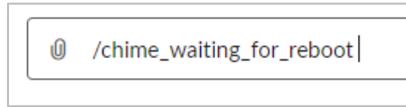


Figure 12: Enter the Wait for Reboot Command

2. Enter the command into the chat session. Chime will notify both agent and guest that the guest is able to reconnect for the next 15 minutes.
3. Wait for the guest to disconnect from the chat session and reconnect after.

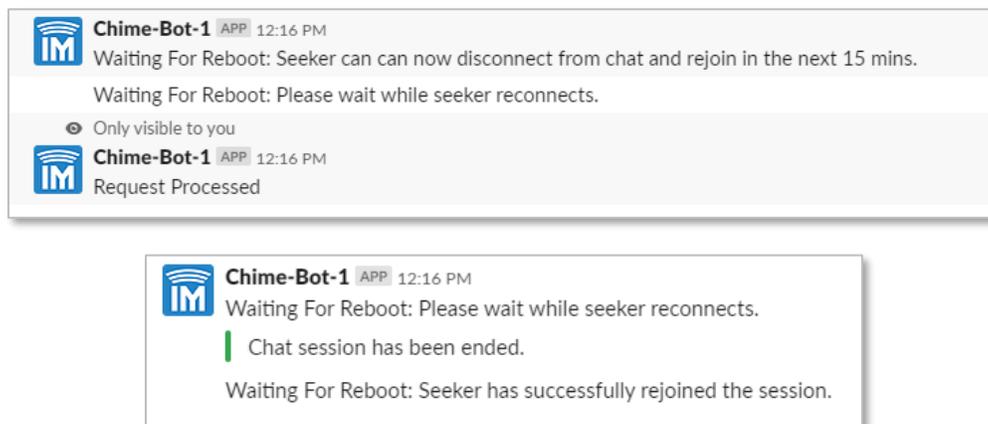


Figure 13: Guest Rebooting and Rejoining the Chat Session

4. Once the guest reconnects, resume the chat session.

After Chat Work Mode

The After Chat Work Mode command can be used by agents to temporarily disable new chat session notifications after you have finished a chat session. This command must be used in the notification channel and not in a chat session. If used in a chat session the command will have no effect.

To use the After Chat Work Mode command:

1. Type the command “/chime_acw ON” in the chat session or pick it from the list of Chime commands.
2. Enter the command into the chat session. Chime will notify you that the command was successful and you will not receive any more chat notifications.

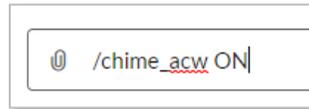


Figure 14: Turning On After Chat Work Mode

3. Once you are done using After Chat Work Mode, type the command “/chime_acw OFF” in the chat session.
4. Enter the command into the chat session. Chime will notify you that you are no longer in After Chat Work Mode and you will be able to resume accepting chat sessions.



Figure 15: Turning Off After Chat Work Mode

Using the Session Details

During chat sessions, agents have access to Session Details. The Session Details give agents additional information about the chat session as well as tool to better help the guest. By default, a button will appear in the chat conversation once it is accepted labeled **Session Details**. If you click the button it will open up the Session Details in a web browser.



Figure 16: Session Details Button

There are five tabs in the Session Details window: Details, History, Replies, Files, and Notes & Tags. This section will go over each tab and all of the features and functions available to agents in the Session Details window.

Details

The Details tab is the first tab that an agent sees in the Session Details when connected with a guest. This window shows details about the guest, such as their name, question, contact information, wait time, and chat content.

The screenshot shows the 'Details' tab of the Session Details window. On the left is a navigation sidebar with icons for Details, History, Replies, Files, and Note & Tags. The main content area is titled 'jsmith@chime - Details' and contains a table of session information. Below the table is a 'Chat Content' section showing three messages from 'IT Service Desk (Slack)'.

jsmith@chime - Details	
Agent	pmadden@instant-tech.com
Queue Name	IT Service Desk (Slack)
Seeker Email	jsmith@chime
Seeker Question	How do I get rid of a "no signal Message"?
Session Guid	3a5cd8da-695a-4617-8fdc-b72dbdf82e43
Session Started	11:21 AM
Wait Time	1 min 58 sec

Chat Content

IT Service Desk (Slack): [11:21 AM (21 Oct)]
Thank you for contacting Help@IBM. Please describe your issue.

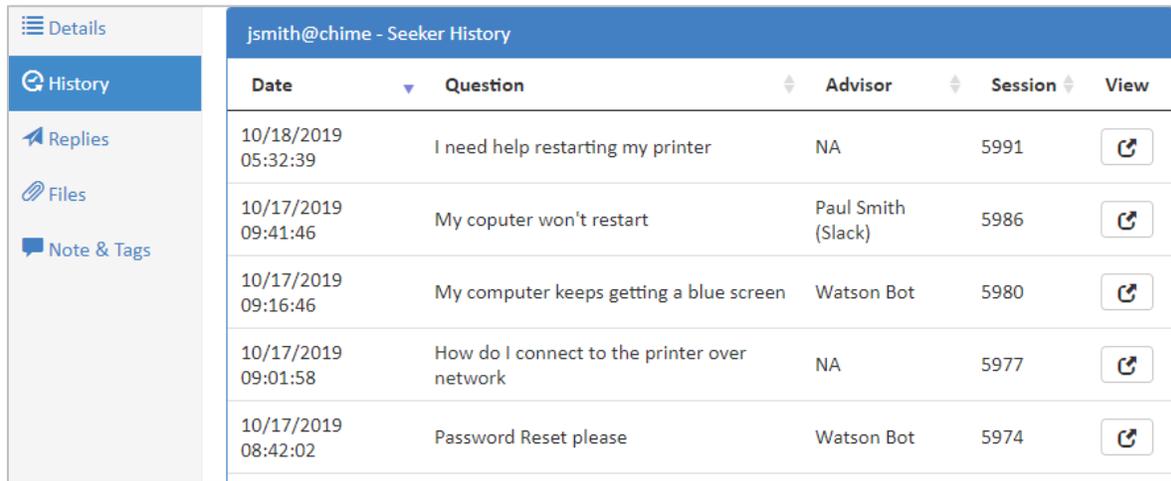
IT Service Desk (Slack): [11:22 AM (21 Oct)]
Please wait while we find the next available advisor.
Waiting position: 1

IT Service Desk (Slack): [11:23 AM (21 Oct)]
Please wait while we find the next available advisor.
Waiting position: 1

Figure 17: Details Tab

History

The History tab shows the previous chat conversations that the guest has had. **Click on the  button** to view previous chats that the guest has had.

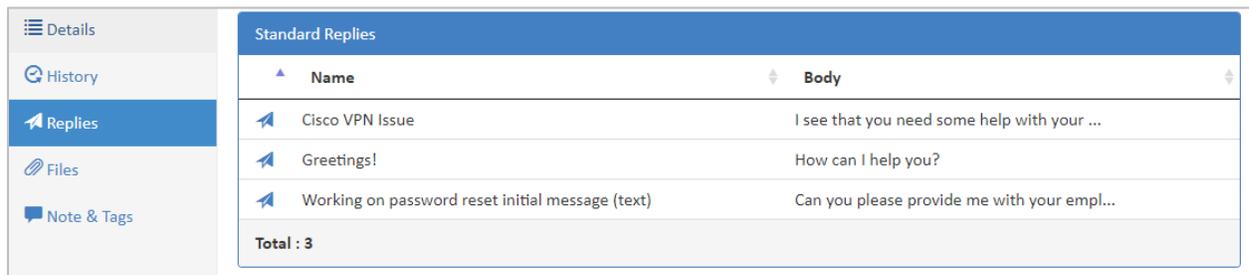


jsmith@chime - Seeker History					
Date	Question	Advisor	Session	View	
10/18/2019 05:32:39	I need help restarting my printer	NA	5991		
10/17/2019 09:41:46	My coputer won't restart	Paul Smith (Slack)	5986		
10/17/2019 09:16:46	My computer keeps getting a blue screen	Watson Bot	5980		
10/17/2019 09:01:58	How do I connect to the printer over network	NA	5977		
10/17/2019 08:42:02	Password Reset please	Watson Bot	5974		

Figure 18: History Tab

Replies

In the Standard Replies tab, agents have access to the standard replies that have been added to the queue that they are in. **Click on the  button** to send a standard reply message to a guest. Additionally, you can **click on the  button** to edit the standard reply before you send it. **Note: Standard replies must be added to queue settings by a manager or administrator.**



Standard Replies	
Name	Body
 Cisco VPN Issue	I see that you need some help with your ...
 Greetings!	How can I help you?
 Working on password reset initial message (text)	Can you please provide me with your empl...
Total : 3	

Figure 19: Replies Tab

Files

Any files that have been uploaded in the chat will be located in the Files tab. Agents have the ability to send documents and pictures to guests, and guests can send files to agents as well. **Click on the 'Upload' button** to send a file to a guest. Click on the 'Refresh' button to reload the list of files, if any have been uploaded.



Figure 20: Files Tab

Notes & Tags

In the Comments & Tags section, attach session tags to the session and comments will all show up in chat history.

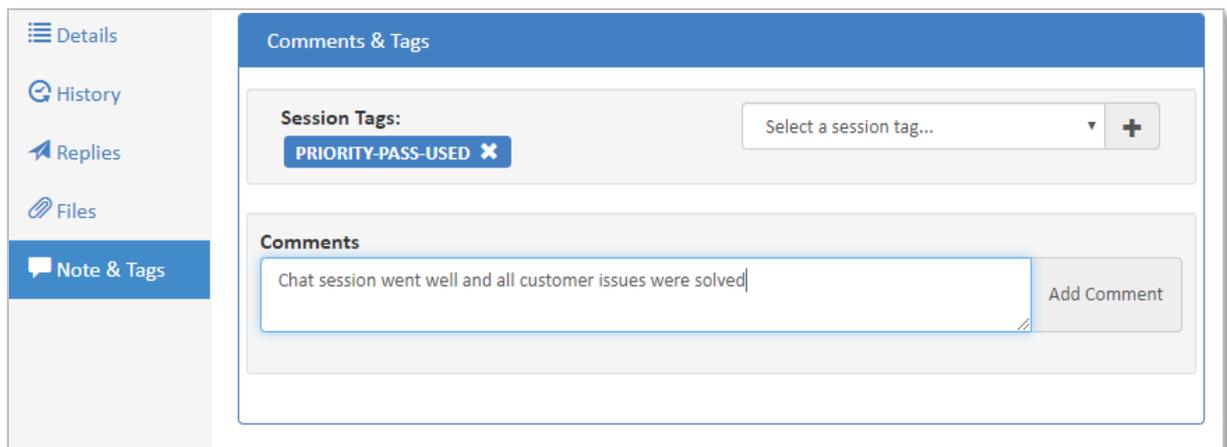


Figure 21: Notes & Tags Tab

Click on the Session Tags drop-down menu and pick a tag that fits the nature of the chat session. Then click the + button to attach the tag with the session.

Add a comment that describes what actions the agent took, or additional issues that the guest had. Ex: *I gave him a password reset and he is all set now, I gave her a license key for Microsoft Office...*

Concurrent Chats

Agents can receive multiple chats at once. The concurrent chat property is defined at an admin level, and the maximum number of concurrent chats an agent can have is ten. Once an agent's maximum concurrent chat number is reached, they will no longer receive any chats until they close out of one or more of their existing concurrent chats. For example, if an agent's concurrent chat setting is two, and they accept two chats, any additional chats will be routed to other agents who have not fulfilled their maximum concurrent or max per day number.