



SmartAgent Training

e-mail Chat & Queued Tasks Module

Version	Date	Author	Changes
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Introduction

The purpose of this guide is to provide you with an introduction to using SmartAgent for email Chat and managing Queued tasks.

There are some training modules to work through and each is supported by a talk-through and demonstration by your SmartAgent Trainer.

You're welcome to ask questions throughout the session and there'll be an opportunity at the end of the course for any further questions or comments.

Pre-requisites for this training

To successfully complete this training you will require the following:

- 1. Access to a workstation
- 2. Access to the internet
- 3. Google Chrome browser
- 4. Your SmartAgent username

We also recommend that you have completed the Agent Training guide for core navigation and logging into the system.

About SmartAgent Email chat and Queued Task management

SmartAgent is an agent application for Amazon Connect. It runs in your browser and simply requires an internet connection and a headset to enable contact.

When used for email chat it will be configured for your organisation and will pickup themes and settings of the mailbox a particular queue is linked to. Therefore the screenshots in this guide are used for illustrative and training purposes and so do not represent the compete content of emails that your customers will receive.

This guide also covers Queued task management which allows you to reply in bulk to emails, add attachments or move emails to different queues. This feature will need to have been configured for your organisation and access to particular aspects can be further tweaked by changing permissions within security profiles to add or remove the ability to add attachments, end tasks as needed by your organisation.



Agenda

Module 1: Email Chat - Core Navigation	4
Answering an inbound email Chat	4
Forwarding an email conversation	7
Response back to same agent	8
After Contact Work (ACW)	9
Module 2: Queued Tasks	9
Queued Tasks Navigation	9
Using Queued tasks menu to reply / bulk reply	10
Using Queued tasks menu to end a contact	12
Adding an attachment to a reply in queued tasks	12
Searching for a contact with only a CC'd email address	13
Configuration of Permissions menu to restrict access to particular Queued task functions	15



Module 1: Email Chat - Core Navigation

By the end of this module you will be able to:

- Answer an email Chat contact (inbound)
- Use the Quick reply function and formatting tools
- Understand After Call Work (ACW) mode and how to use it

Answering an inbound email Chat

Just as with a voice contact, Inbound email chat contacts are distributed to you based on your **Routing Profile** which has been applied by your Supervisor. Contacts are queued in the order they are received, and you will be offered the next chat in the queue as soon as your status is set to **Available**.

When a new contact arrives, SmartAgent:

- Changes your status to Inbound contact
- Displays the contact information in the header

There are call answering options, and your Admin will have chosen which option applies to you:

- 1. Auto-answer: This means an email Chat will be accepted automatically.
- 2. Manual-answer. You will need to click the green button in the heard to respond to a chat.



When an email chat is answered, SmartAgent:

• Changes your status to In contact



• Displays the in-chat controls

You may receive onscreen prompts if a customer has been in regular contact within a set period and you may also be able to access the contact history from that email address if that feature has been enabled for your organisation.



You can click into the email address field to review who has been CC'd into the email and can use the diagonal arrow in the top right to open the email into a larger window to see the whole email while writing your response.





Within this view, just as in the normal chat view you can click on the Quick reply button on the bottom left to access any of your organisations Quick Replies. You can also select the button to include the CC'd email addresses in your response.

You also have access to a range of formatting options, emoticons, and attachments if these have been enabled for you to use.

If you select the add attachment icon you will need to browse your files to find the attachment and select it. These attachments will then be viewable in the chat message, for you to check before sending your message. If you hover your mouse over the file icon you will be shown the full file details to ensure you are sending the correct attachment.

→ Forward conversation
Hello customer! Sending attachments
Screenshot a 1.38 MR - PNG Screenshot at Apr 19 16-40-13.png
Screenshot a 1.57 MB - PNG
Include CC in the reply
□ B I ☵ ☵ ☞ ⓒ 0 Send

Once sent, each attachment will appear as a separate item within the chat window with a matching icon , based on the file type, but the addressee will receive one email with multiple attachments.





Forwarding an email conversation

If you have the Forwarding email feature enabled in email, an Agent will have the option to forward an ongoing email conversation to a specified email address.



In order to do this, select the "Forward email Conversation" link and a new screen appears where they can review the email conversation.

The Agent then inputs an email address in the "forward to" field.

They can add a message to the forwardee, if required, before hitting the send button to forward the email to that person.

If the person who the mail has been forwarded to responds to the email, this message is placed back into the Queue marked as coming from an external source.

	15	40
Exterr	nal from: paul.egan@missionlabs.co.uk	
mes	sage back from me	
Pau	I Egan	
Hea	d Of Training	
033	3 090 4217 Sioplats co.uk	
@Mi	ssionLabsHQ	
	→ Forward conversation	
To:	^	
Ente	Customer: tom.kharchi@missi	
	External: paul.ega@missionla	
	External: paul.egan@missionI	
_		

The Agent can then choose to converse with the forwardee or the customer by selecting their email address in the dropdown field as required.



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Response back to same agent

If you have the threaded response feature enabled in email, if a customer responds to the email straight away, or within an agreed period, the email response will be presented to the agent as a "new" interaction within the email chat, just like a normal chat interaction.

The Agent will get an onscreen notification of a new element in the chat and the response from the customer.

image/png	
Screenshot at Apr 19 17-59-27.pn image/png	y ng
Customer: y.zhakalau@godeltech.com	
Thank you!	
11:16	
Enter message	
Include CC in the reply	

If the response comes outside of the agreed time parameters, the response will be presented to the next available agent, however the agent will be able to see the previous discussion and email conversation and pick up the conversation thread.



After Contact Work (ACW)

If the agent believes that the email conversation has reached a conclusion you can select the option to end the chat and enter wrap up a by clicking on "wrap up" and the After contact work section will appear.

You will have the opportunity to add any notes or other preconfigured info in the contact log and then click the **Finish wrap up** button. To make yourself available for further contacts

Module 2: Queued Tasks

By the end of this module you will be able to:

- Utilise the Queued tasks menu options to manage email queues
- Understand the configuration options available and how to amend these for particular security profiles

Queued Tasks Navigation

Queued tasks are normally managed by a distinct group of users, often those who may have supervisor access, so Queued Tasks is located under the metrics and data menu option





Within the Queued tasks screen you can search for a task containing particular text, from a specific channel or queue or by enabling the toggle switch to search for a specific contact ID. Once you have entered your search parameters hit the search button and the filtered results will appear in the field below.

Within this field you can use the "select all" button or specific items by clicking the tickbox next to the item.

Once you have selected items you can then bulk export, move or reply to all the selected items.

Entry		Channel		Queue			
ext Entry		1 Channel(s) selected		No Queue(s) selected	0	Search	
Search by Conta	ict ID						
suits					Auto-refresh	off C Bo	ort Reply Move
elect All	CHANNEL	CUSTOMER DETAILS	SUBJECT	MESSAGE	01	EUE	DATE V
	EMAIL	mason.rooney@missionlabs.co.uk	Test	Test 123 [signature_310352473] Mason Rooney Technical Business An	т	isks	18/04/2023 10:22
	EMAIL	azeez.alabi@missionlabs.co.uk	testing	Nowwwww	В	sicQueue	13/04/2023 09:46
_							

Using Queued tasks menu to reply / bulk reply

Once you selected the item or items you want to reply to select the reply button.

ext Entry		Channel			Queue			
Text Entry		1 Cha	nnel(s) selected	c	No Queue(s) selected	0	Sei	arch
Search by Conta	ict ID							
results						Auto-ref	resh Off C	xport BOX Nov
Select All	CHANNEL	CUSTOMER DETAILS	su	JECT MESSAGE			QUEUE	DATE
2	EMAIL	mason.rooney@missionlabs.c	co.uk Tes	t Test 123	[signature_310352473] Mason Rooney Technical Bu	usiness An	Tasks	18/04/2023 10:22
0	EMAIL	azeez.alabi@missionlabs.co.u	uk tes	ting Nowww	w		BasicQueue	13/04/2023 09:46



You will then be given a text box where you can write a response to all the selected tasks. You can access any Quick replies or formatting options. If you have been given permission you will also see the attachment icon to add attachments.

Once you select the reply button you will be asked to confirm if you want to send this reply to the

1 Contacts selected	Cancel Reply
The text box below allows you to send a reply to all the co if you no longer wish to send a reply to these contacts, se	stacts that you have previously selected.
Replied to contacts will still be in a queue and available to Email/Webform Replies	agents.
Genj	
	Reply to Contacts
	Are you sure you want to send this re contacts you have selected?
	Cancel Yes

number of selected contacts.



Using Queued tasks menu to end a contact

Once you have replied to contacts, if you have permission, you will be offered the opportunity to end these contacts. You can enter notes, add a reason for the contact and then choose the yes option to end the contact, or No option for the contacts to remain in the queued task list.



You will get an onscreen progress report as the selected tasks are processed and ended. This may take upto 30 seconds to complete and any errors or issues will be highlighted.

Adding an attachment to a reply in queued tasks

If you have the permission you can add an attachment to a either a single queued task or a number of queued tasks (bulk queued tasks). These permissions are separated, so the attachment icon will appear depending on how many tasks you have selected.

Namely if you select multiple tasks, you need to have the "bulk attachment" permission for the icon to appear. If you only have permission to just "add attachment" then this icon will only occur if you reply to one task at a time.



The text box be	low allows you to	send a reply to a	II the contacts the	at you have previ	iously selected.	
Replied to cont	acts will still be in	a queue and ava	allable to agents.	ancer option.		
mail/Webform R	eplies					

In order to add an attachment, select the attachment icon and search for the attachment within your file management system.

You can select multiple attachments but need to consider any capacity / file size restrictions within your mailbox settings. The attachment will show onscreen with a file icon, allowing you to check it is the correct attachment and it's size before sending out.

text box below allows you to send a reply to all the su no longer wish to send a reply to these contacts	e contacts that you have previously selected. s, select the cancel option.
lied to contacts will still be in a queue and available	e to agents.
all/Webform Replies	I
Test reply	
ML-F-Banner_	

Searching for a contact with only a CC'd email address

As the Contact Search Record captures the customer and agent details it will not return a result for a contact where you enter an email address that has only been CC'd into an email rather than the primary contact.

So if you need to search for a contact based only on a cc'd email address this can be done using the Interactions search menu.



Go to Settings Menu and select Interactions. Within the interactions page select CC'd email address from the dropdown menu.

ক্ট্ৰ	SETTINGS
	Connect
	Directory
	Permissions
	Twitter Onboarding
	Facebook Onboarding
	Instagram Onboarding
	Interactions 🖕

In the search field type in the email address you want to search for and click the search button.

Interactio	ns			
Search by:	CC Email Address 🗘	testfortest@	test.co.uk	Search

You will then be presented with a list of all interactions involving that cc'd email address.

Interactions							
Search by:	CC Email Address 🗘 testfortes	t@test.co.uk Search					
<u> </u>	INITIATION	AGENT	DATE 🤟	QUEUE	DURATION	ACW REASON	
	INBOUND	Mason Rooney	18/04/2023, 14:29	Tasks	0m 51s	N/A	

Click on the item to expand the details of the item you want to check.



Interactions			^
< Back Contact ID: fef57c30-91df-4270-b8fc- Tasks Date 10/04/2023, 02:29	Agent Mason Rooney Duration Om 51s	From: mason.rooney@missionlabs.co.uk (Mason Rooney) Tic test@mi-neptune.co.uk Subject: Test email CC: test/ortestitestc.o.uk .	
Channel EMAIL System Endpoint test@mi-neptune.co.uk	Initation Method INBOUND Customer name Mason Rooney	Clate: 18/04/23, 14:29 Test email 12:3456 [signature_310352473] Mason Rooney Technical Business Analyst 0333 090 6637 missionlab.ouk ig MissionLab.HQ	18/04/23, 14:29
CC Email Address testfortest@test.co.uk		Image/001.eng IPHG- 672.KB	Show all messages

You will then have access to the details, including the CTR reference and all messages associated with that contact.

Configuration of Permissions menu to restrict access to particular Queued task functions

You can configure specific permissions in the Queued task by amending the permissions within a security profile so that for example, one security profile would allow a user to only attach a document to an individual task reply. Whereas another user might be allowed to attach a file to multiple tasks as a "bulk response"

Go to Settings Menu and select Permissions. Then select the Security profile that you want to amend access from those listed.

8	SETTINGS Connect	Mason Offline 10m 06s V Q				
	Permissions	Roles + Permissions Role NAME A				
	Instagram Onboarding Interactions	Agent CallCenterManager				
		QualityAnalyst				

You are then able to amend the details of the security profile to reflect the access and permissions you want them to have when dealing with Queued tasks

So they must have "Access Queued Tasks".to see the menu option for Queued tasks





"Move Contacts".allows users to move tasks to different queues.

"End Contacts" allows users end selected contacts without having to reply first.

"Reply then end contacts" users must reply and will then be prompted to end contacts.

"Reply to Contacts" allows users to reply, but they aren't asked if they want to end contacts.

"Export Contacts" allows users to export tasks.

"Queued task upload attachment" allows users to reply with attachments to only one task at a time.

"Queued task bulk upload attachment" allows users to reply to multiple tasks with attachments.





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