Agent Portal

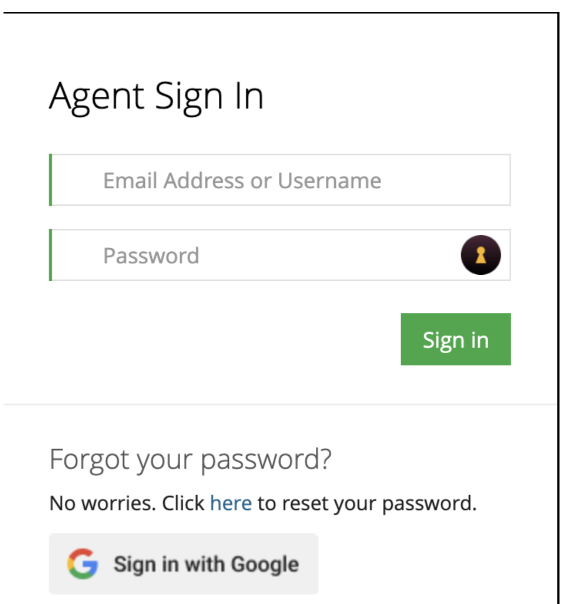
Table of Contents

SIGNING IN AND OUT

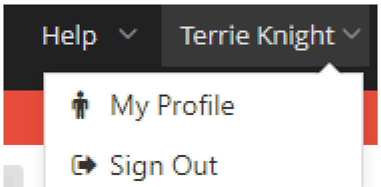
To login as an agent, navigate to https://{Custom_Subdomain}.kauneonga.com/agents. You may also login as an agent through the Supervisor Portal by connecting a Supervisor to an Agent in the Admin Portal.

Agents may also utilize the "**Sign in with Google**" OAuth implementation. Using this, agents can securely authenticate into the platform using Google's native MFA features to maintain security as well as add an additional seamless way to login.

It is important to note that this method will only be available to Liberty agents who use the same email in Liberty as they have in their Google account, meaning this requires a Google account to be possible.



When leaving for the day it is recommended to '**Sign Out**' of Liberty, to efficiently utilize your Agent License. It is not recommended to just close the browser without signing out, to avoid any sessions being assigned to your agent as well as utilizing 1 of the limited agent seats.

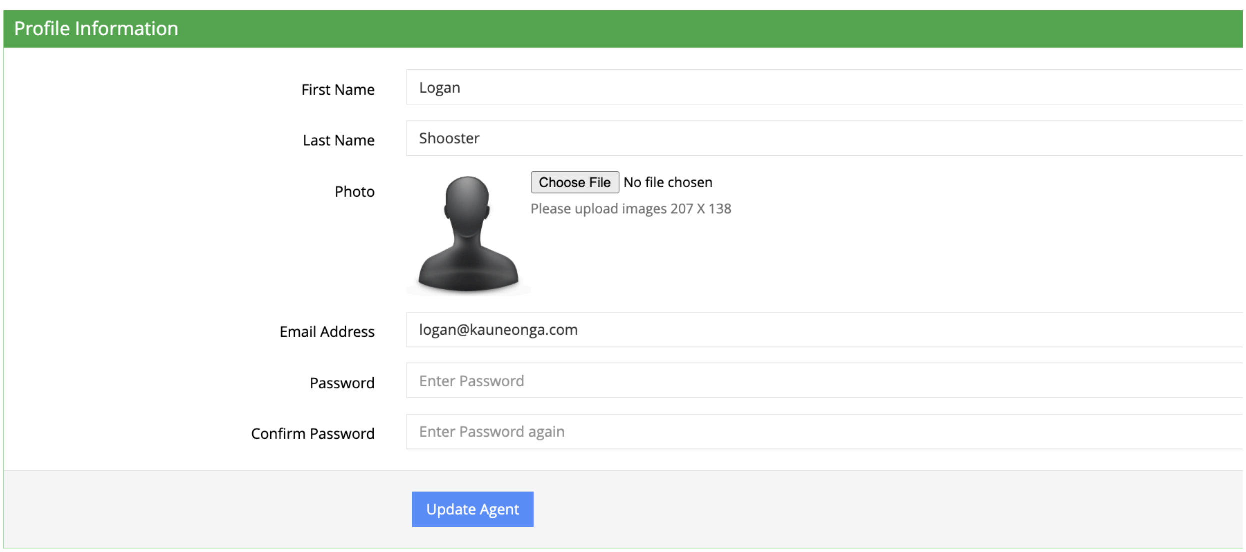


AGENT PROFILE

PROFILE INFORMATION

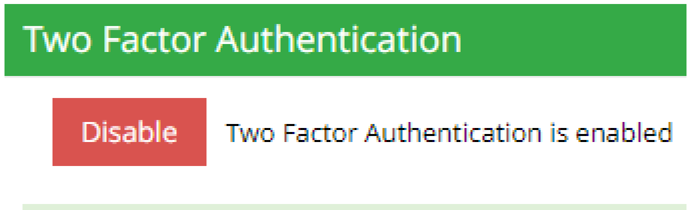
Profile information contains the ability to add/change/edit your first name, last name, photo, email address, and password.

- Click your name on the top right and click "My Profile"
  - Make the necessary changes and click "Update Agent" to save them.



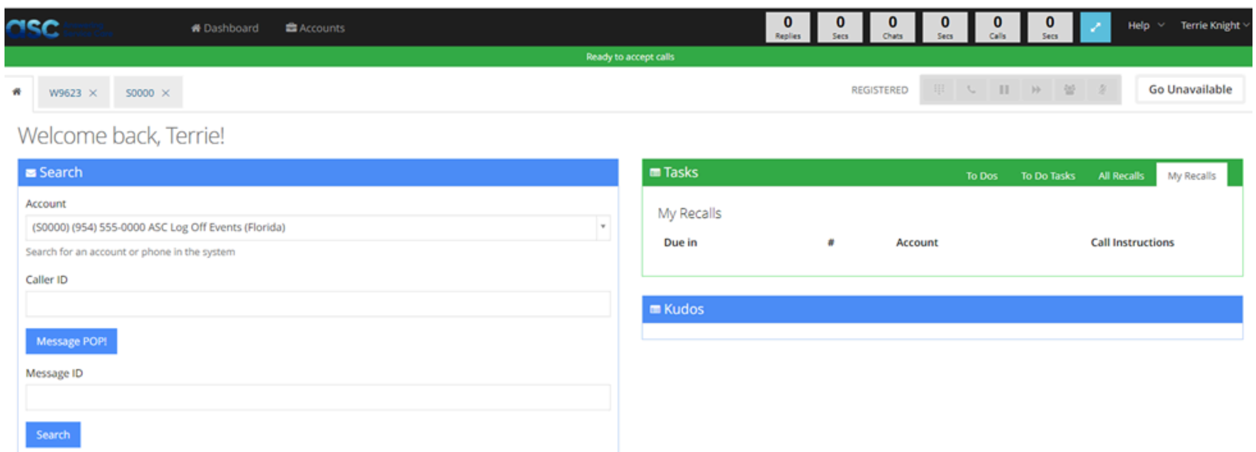
MULTI-FACTOR AUTHENTICATION

- To enable MFA, once you are in your agent profile click on "Authentication" on the left.
- Enable or Disable by clicking the button.



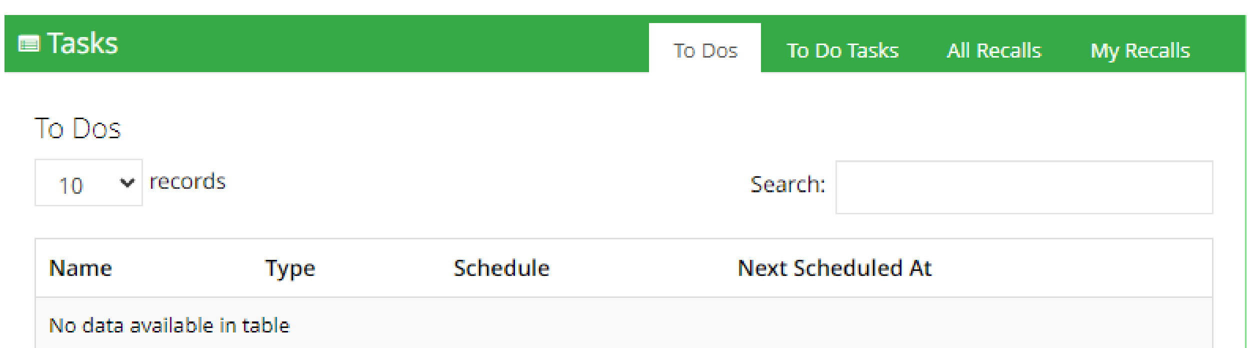
AGENT DASHBOARD

The Liberty Platform allows for omnichannel communication with customers via live chat, SMS, and voice. We can manage all of these interactions from one place within one browser tab.



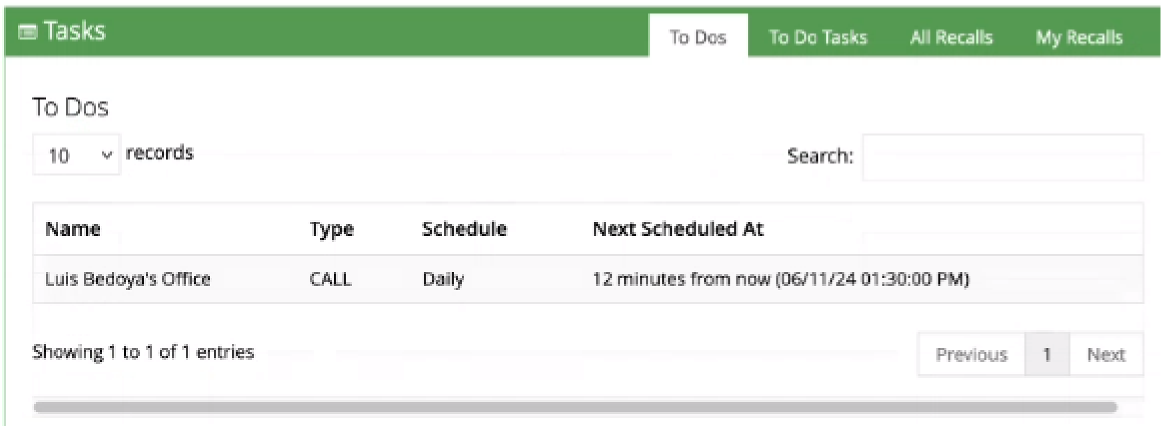
TASKS

Tasks display reminders and recalls. Reminders are jobs that need to take place such as calling a client to remind them of something, clear out their messages, etc. Recalls are actions that need to take place to ensure the client receives the message. These could be calling the client every 10 minutes, calling the next person on the escalation list, etc.



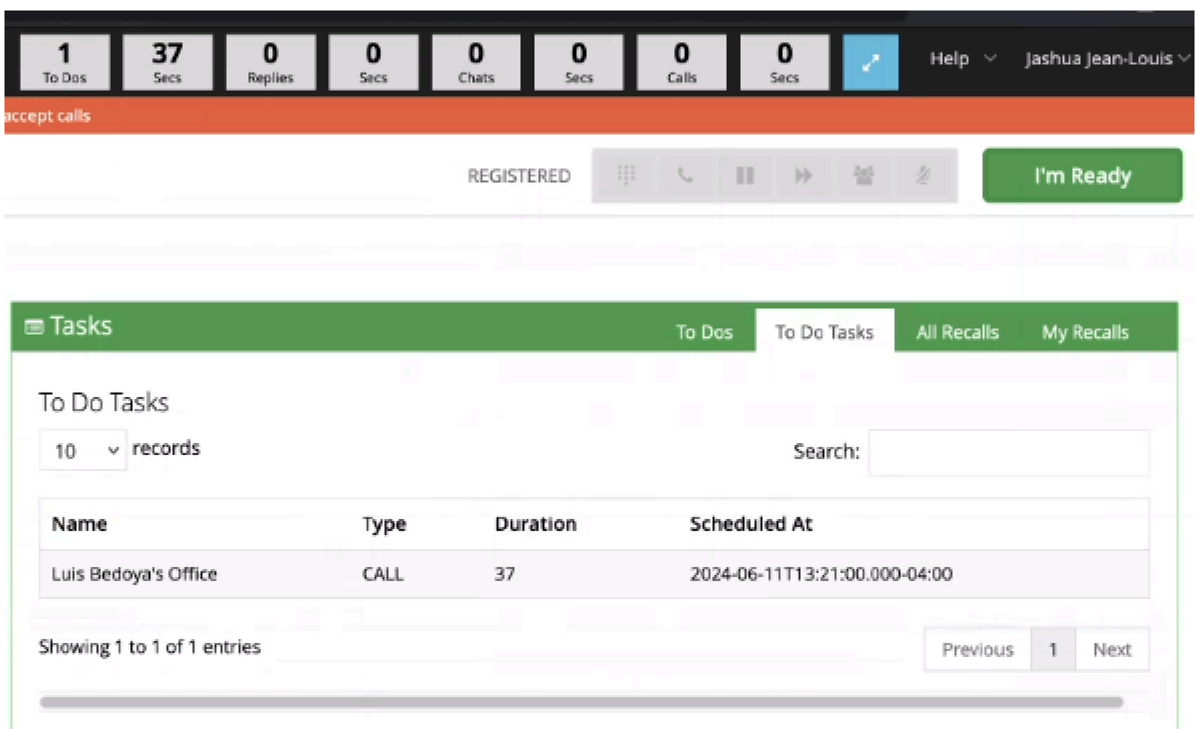
TO DOS

This tab displays the reminders that are coming up for the day. Once those reminders are handled they will disappear from this tab.

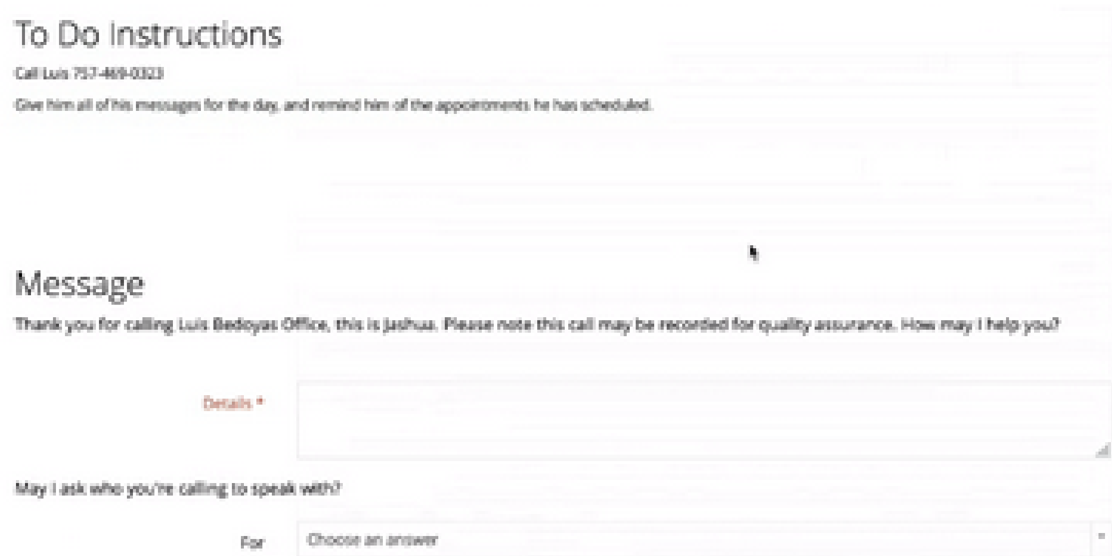


TO DO TASKS

This tab displays reminders for the current day that are due now. The only tasks that will pop-up to an agent will be outbound call tasks when the agent is available.

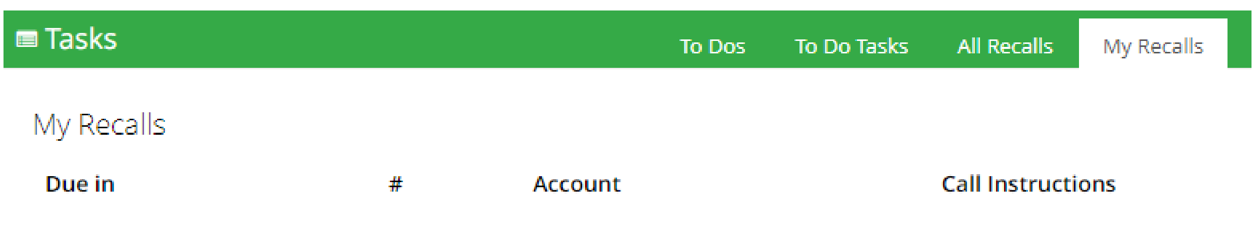


When a to-do task is ready it will pop to an agent as they are available. To acknowledge that the to-do tasks has been completed you would create a Non-Message or Message.



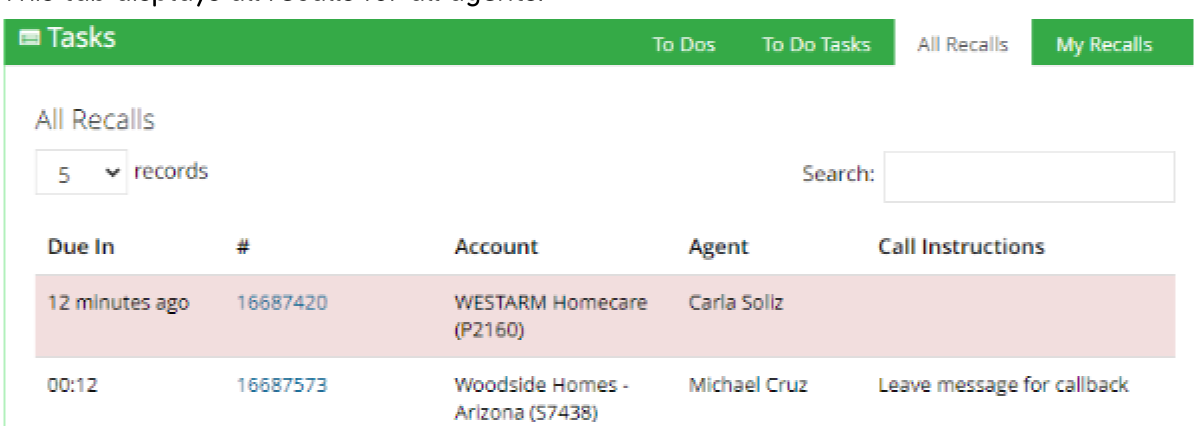
MY RECALLS

This tab displays your individual recalls. Recalls are actions that need to take place to ensure the client receives the message.



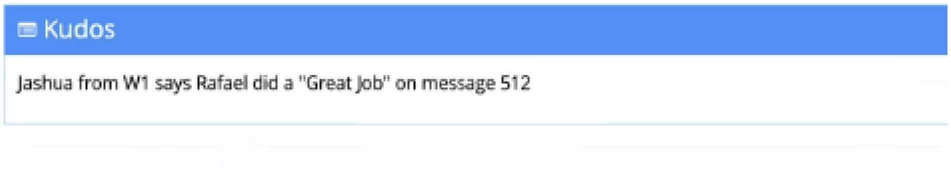
ALL RECALLS

This tab displays all recalls for all agents.



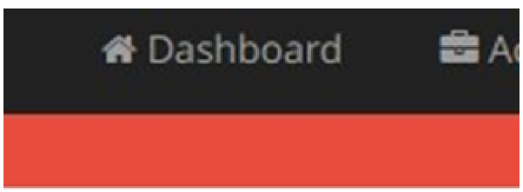
KUDOS

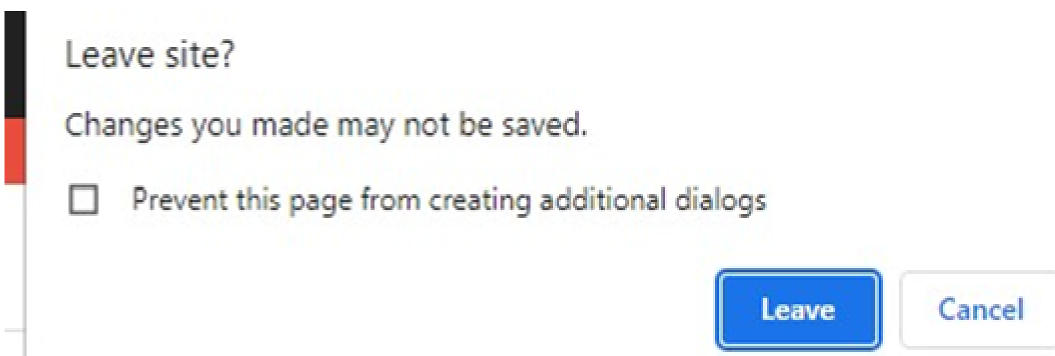
Here you can see where clients have recognized agents for a job well done!



DASHBOARD

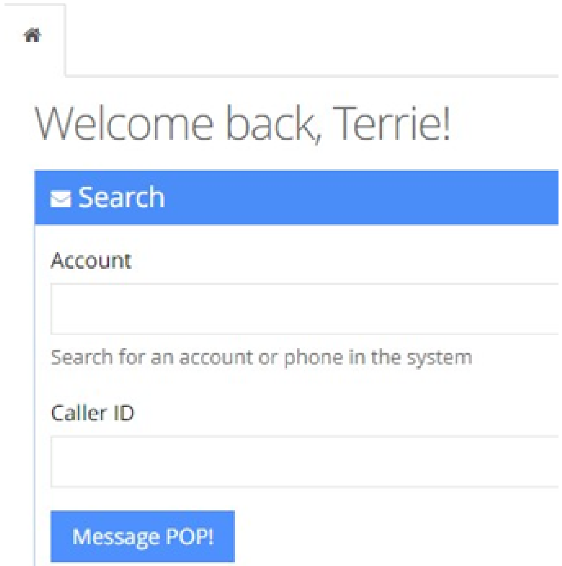
Clicking on "Dashboard" will reload the browser. If the Liberty Platform asks if you want to leave the site, you may click "Leave", but only if you are sure you have created your messages and finished all active sessions, otherwise you will lose your messages, any data currently, and end any active calls, chats, SMS, etc.





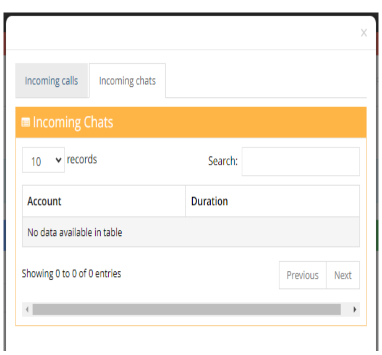
SEARCH

To bring up an account manually and to prevent losing any information you have collected, hit the Home button (house icon) and search for the account using the Account search bar. Type the account name or account number in the search field. Once you see the account you need, click on it then click the Message POP! button.



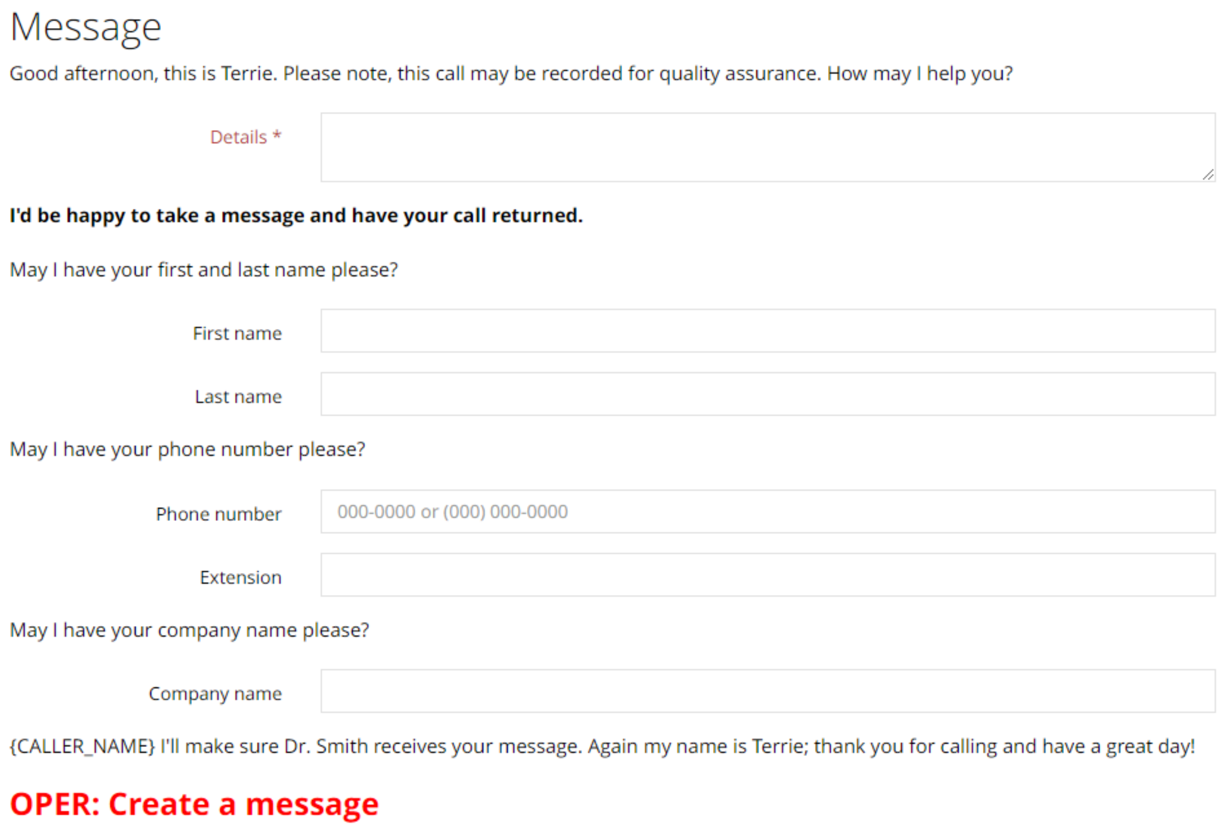
AGENT TICKER

This displays the number of SMS replies, chat sessions, and calls that are in queue and the amount of time they are in queue in seconds. If you click on the blue expand button you will see a detailed view of the queue.



AGENT SCRIPT

Agent scripts are entirely dynamic allowing for customized scripts based on the caller's responses, enabling agents to respond to client requests consistently, while also personalizing their approach to each individual customer's needs. This technology streamlines the customer interaction process, helping agents provide accurate information and resulting in increased customer satisfaction. With this solution, agents can respond to client requests in a consistent manner, yet tailored to each client's specific reaction.



Message

Good afternoon, this is Terrie. Please note, this call may be recorded for quality assurance. How may I help you?

Details *

I'd be happy to take a message and have your call returned.

May I have your first and last name please?

First name

Last name

May I have your phone number please?

Phone number 000-0000 or (000) 000-0000

Extension

May I have your company name please?

Company name

{CALLER_NAME} I'll make sure Dr. Smith receives your message. Again my name is Terrie; thank you for calling and have a great day!

OPER: Create a message

SCRIPT FIELDS

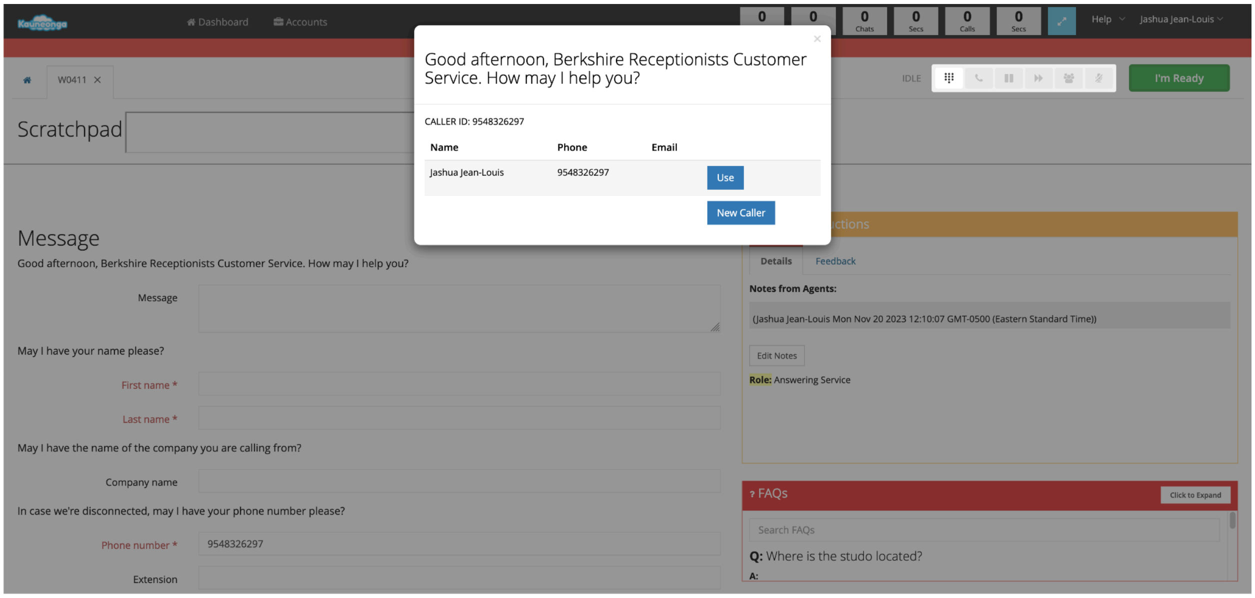
- Fields may be navigated by using the tab key or mouse. If using the enter key, the system will submit your message if all required fields are filled out and there is no way to undo this.
- Required fields are signified by a red asterisk * and must be completed.
- Fields may be left blank that are optional if callers refuse to leave information or the field does not apply to that caller.

CALLER ID DATA DIP

If someone has called previously from a phone number some of their info may appear. Again, this is based on their phone number. Our system is recognizing the caller ID.

When this happens, ask the caller for their name to confirm that the info populated is this particular person. If it is the person you are speaking to, select "use". If it is a different person, select "new caller".

Always verify the information with the caller to ensure it is accurate (spelling of name, phone number, email)!



MANAGING MICRO TABS

Each time you go to a new account a new tab will appear within the Liberty Platform (we call these micro tabs). Once you have finished with an account please close out the micro tab. This prevents us from losing track if we have created a message or not.

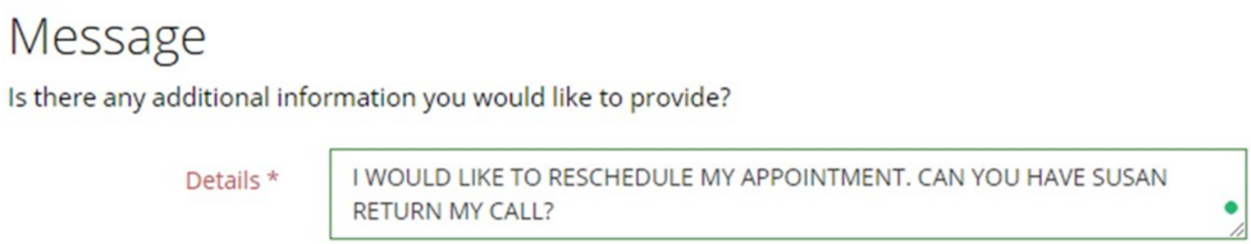
SCRATCHPAD

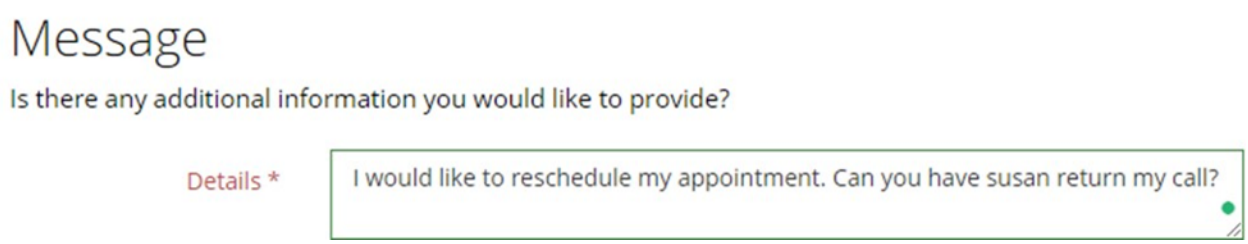
The scratchpad is an area where you can begin typing brief info the caller is giving you at the beginning of the call. This info can be copied and pasted to the necessary fields (phone number, name, etc.) It's best not to type the entire message in this field as you may miss questions or other instructions on the message form. The scratchpad will follow you as you navigate through the page. Any information you type in this field will not be sent over to the client.

TITLE CASE, SENTENCE CASE, AND TRANSLATE

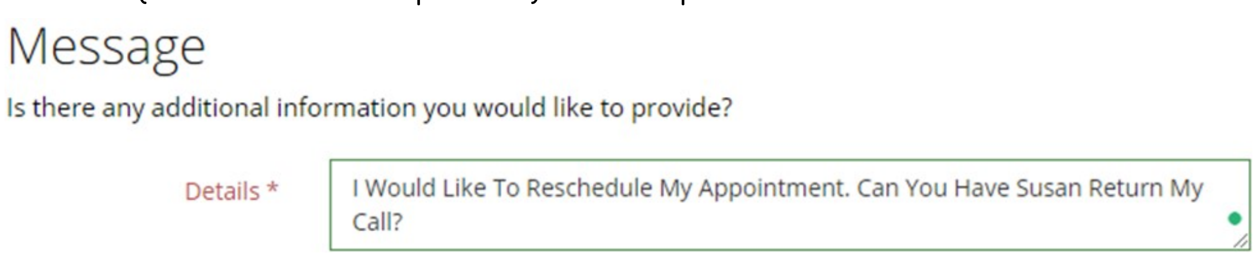
To assist with typing in the proper case, Liberty has buttons next to the scratchpad that will convert your text into the proper case. It is a best practice to use proper uppercase and lowercase letters (i.e. Bob Smith 222 Juniper Ave), proper punctuation, etc.

Selecting Sentence case (the first button Aa) will convert your text from uppercase to Sentence Case. See example below.

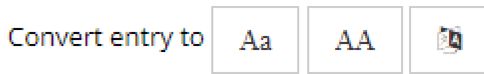




Selecting Title case (the second button AA) will convert your text from uppercase to Title case (each word will be capitalized). See example below.



There is also a translate button (3rd button) that will translate text from Spanish to English or Portuguese to English. This is not a perfect translation so please proofread your message before creating it.

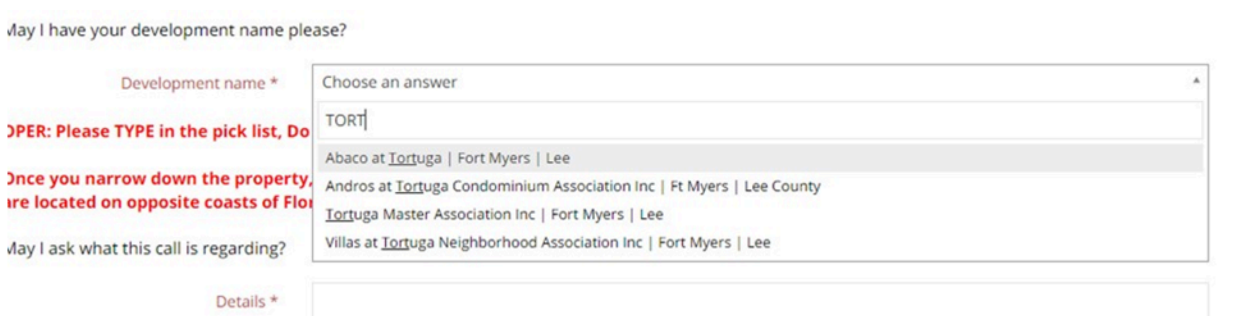


SCRIPT DROPDOWNS

There are several ways to make a selection from a dropdown

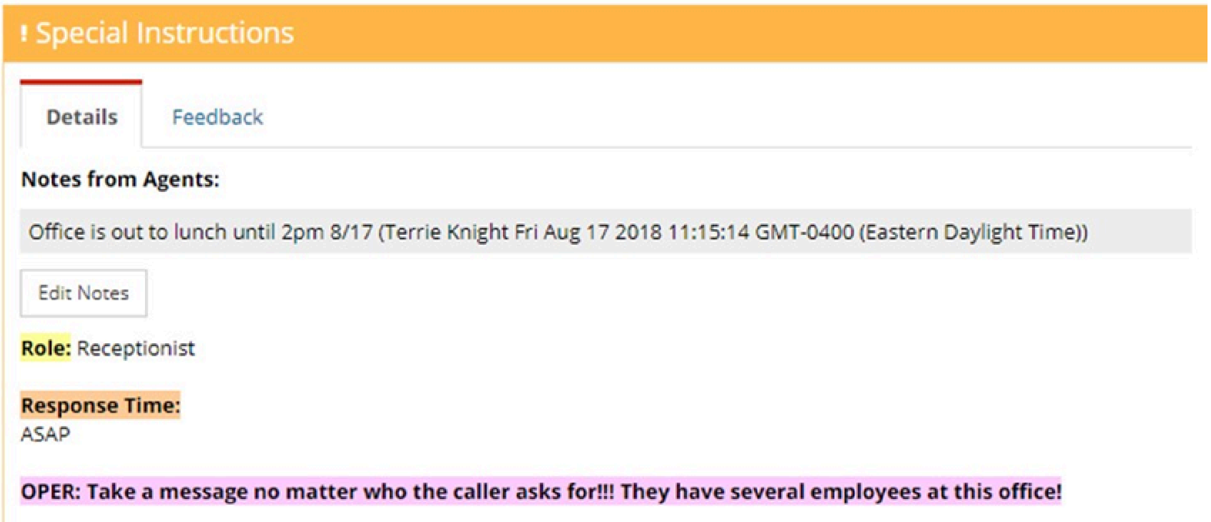
1. Type in the name of the requested person, name of the property, reason for the call, etc.
2. Click in the dropdown and scroll with the mouse or arrows.
3. Type in any portion of the requested person's name, name of the property, reason for the call, etc and anything with those letters will populate. In this case we are searching for Andros at Tortuga but we started typing in Tortuga.

Choosing the correct selections in dropdown boxes is highly important as these may trigger appropriate additional questions and ultimately dispatching instructions.



SPECIAL INSTRUCTIONS

There are 2 tabs to pay attention to under special instructions; Details and Feedback.



Details include Notes from Agents, role, response time, etc.

Notes from Agents: In this area you can enter info for other agents to see (i.e. out to lunch, in a meeting, gone for the day, water is out in bldg A, etc.).

DO WE WANT TO KEEP THIS HERE? SOME COMPANIES MIGHT DO SOMETHING DIFFERENT...PLEASE ADVISE

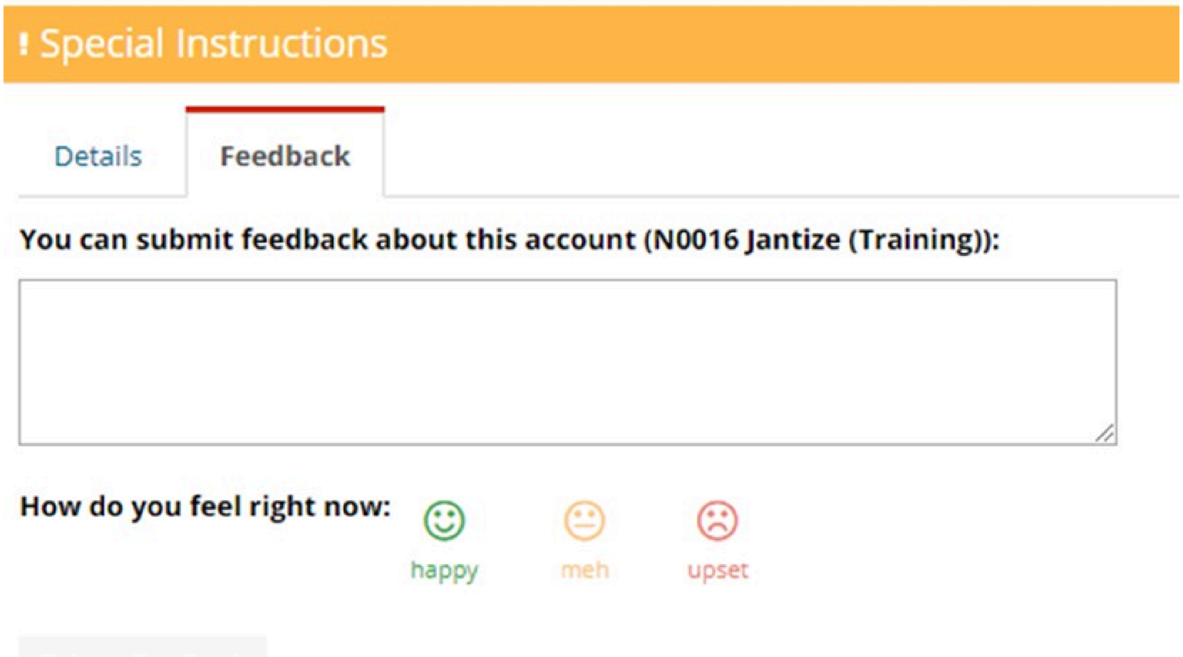
Also located in the notes from agents should be any “If messages” that are left from our clients. If messages are special messages designed for us to give out to customer(s). These can be specific messages that are meant for only one person, or they may be for any groups of customers. Examples include:
Our client calls in to instruct us that if Mary Miller calls, tell her “The technician will be at your location at 8:00PM tonight.”
Our client calls in to instruct us that if anyone calls in regards to a water outage that we should inform them “We are aware of the problem and are presently working on it. We expect to have it restored by 8:00PM tonight”.

This is not a field to enter any on-call information.

Role: In this area it is noted whether you are the answering service or the receptionist for this particular company in case a caller asks if you are the answering service.

Response Time: In this area it is noted when the caller can expect a return phone call if they ask.

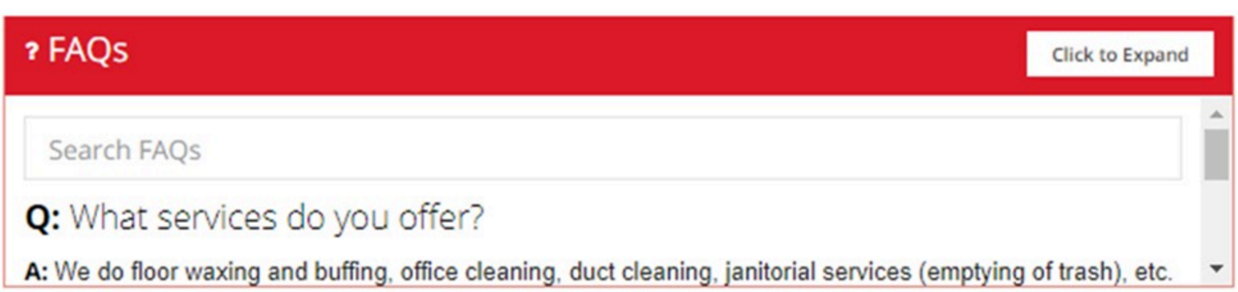
The feedback tab is where you can let us know how you feel about a call you handled or feedback about the account in general. We'd love for you to be happy all of the time but every once in a while, you may have a moment that makes you meh or upset. Let us know how you feel. It matters!



FAQs

Not every account will have an FAQ section but if it does you may find answers to questions in this area.

Callers may ask about pricing, if the company provides free estimates, how long do appts take, etc. You can use the smart search feature by typing key words in the search bar and it will bring up the Q & A housing those keywords (i.e. price, estimate, etc.) This field can also be expanded by clicking the "Click to Expand" button.



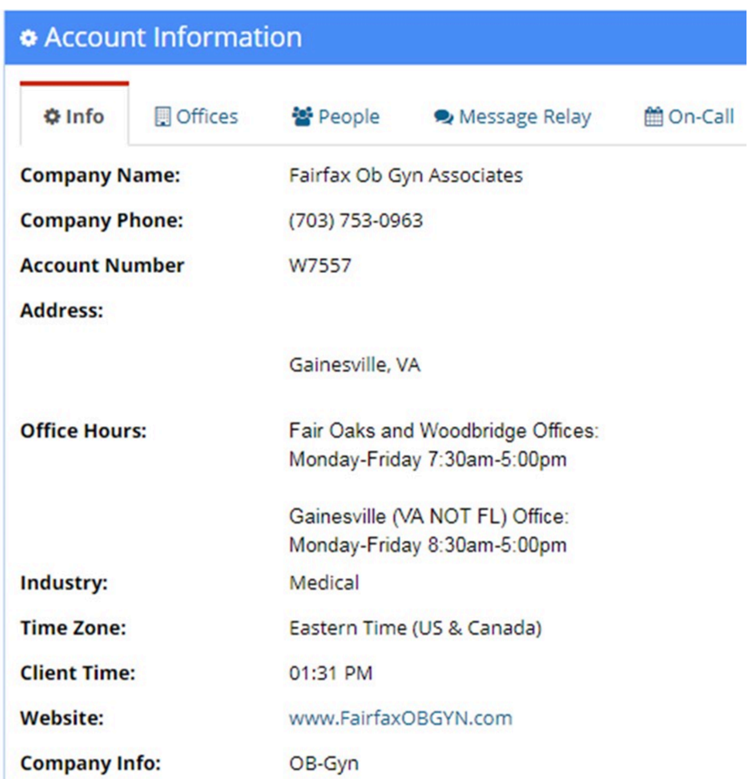
ACCOUNT INFORMATION

The general information for the company is located on the middle right hand side of the screen (i.e. office hours, address, etc).

There are 5 tabs (info, offices, people, message relay, on call).

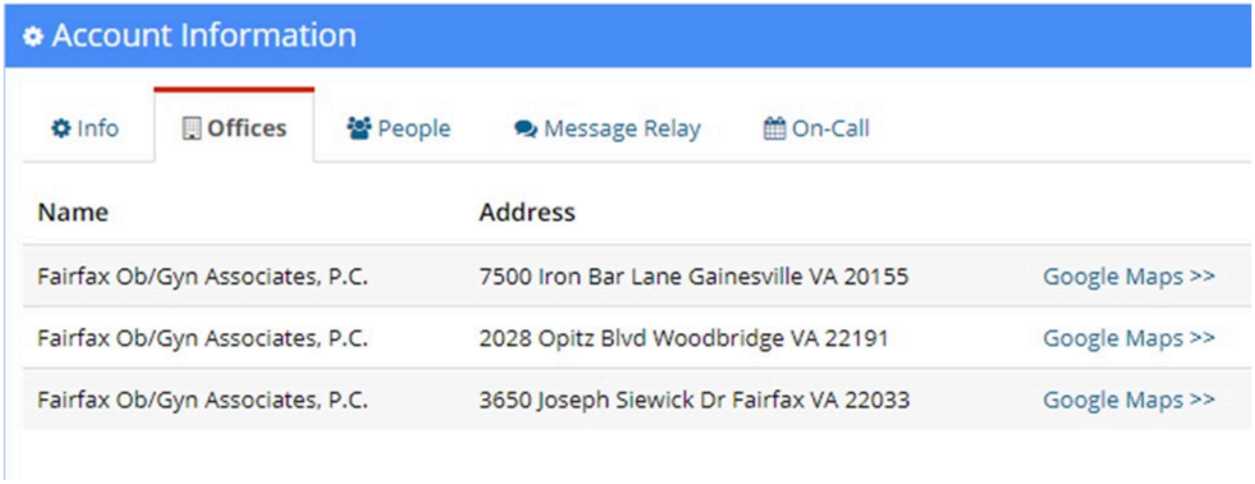
INFO

The “info” tab displays company information such as the company name, phone number and address, the account number, etc. Any information on this tab can be given out to callers.



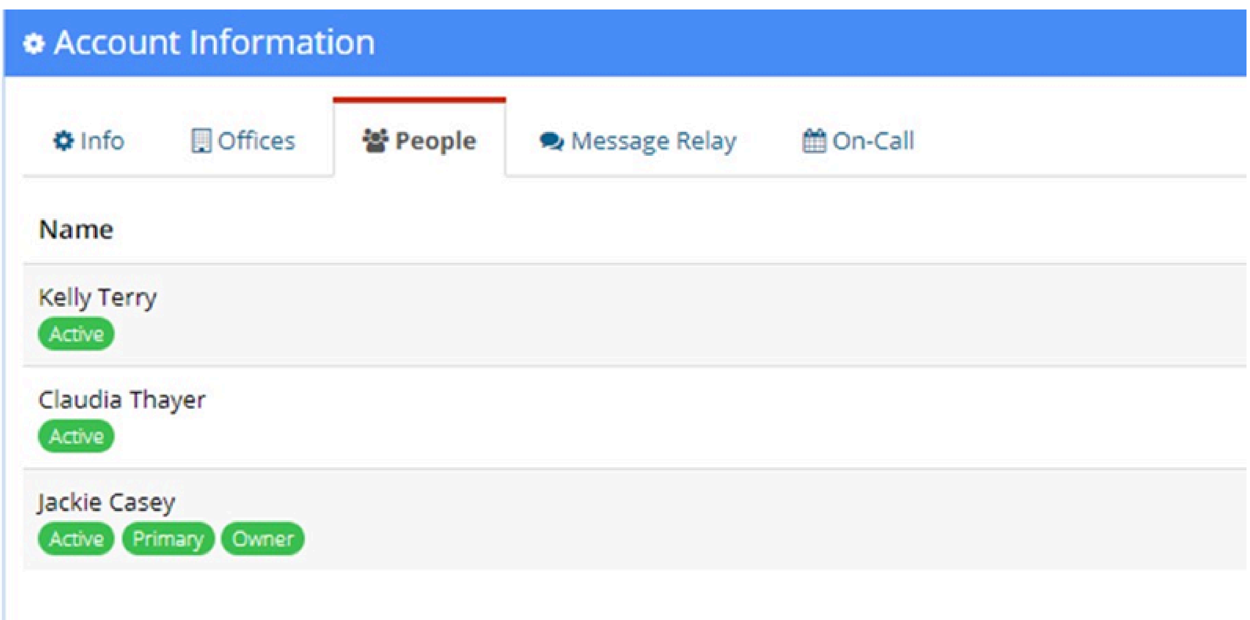
OFFICES

The “offices” tab displays the office’s address(s). If there are multiple locations you will see several addresses here.



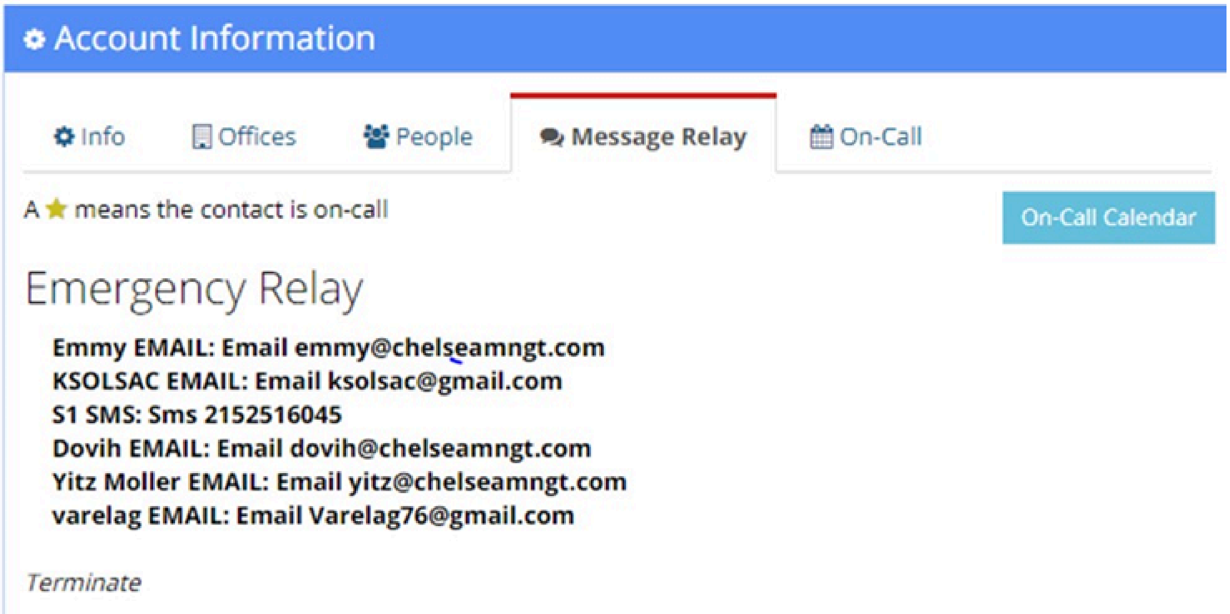
PEOPLE

The “people” tab displays the contact people on the account. Any information on this tab cannot be given out to callers.



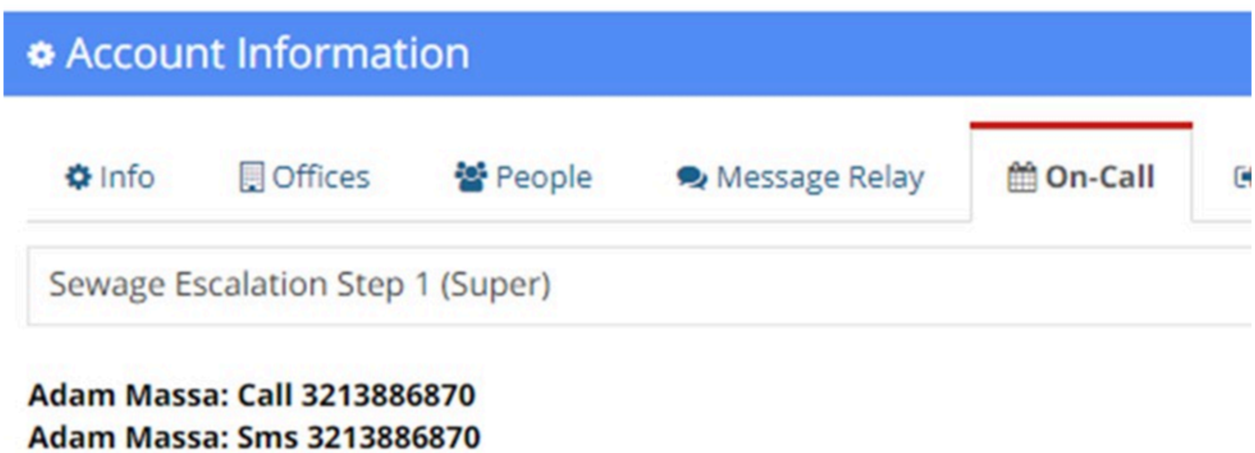
MESSAGE RELAY

The “message relay” tab displays the relay instructions and who is on call, if anyone (you will see a star by their name). You will also see a button for the “On-Call Calendar”. More on this later.



ON-CALL

The "on-call" tab displays who is actually on call (meaning the person we have to call for your message). This is determined by either the call type you selected or whether it's an emergency or not. More on this later as



MESSAGES

CREATING MESSAGES

Once all required script fields have been filled in, to create a message click "create message", then follow any dispatching instructions that appear.

The messages box is located on the bottom right hand side of the screen.

There are 2 different tabs you should check when a client calls in for messages (Inbox & Delivered).

INBOX

The Inbox contains messages that have been relayed to the client but have not been acknowledged by our client. You should check the Inbox first when a client is calling in for a message.

DELIVERED

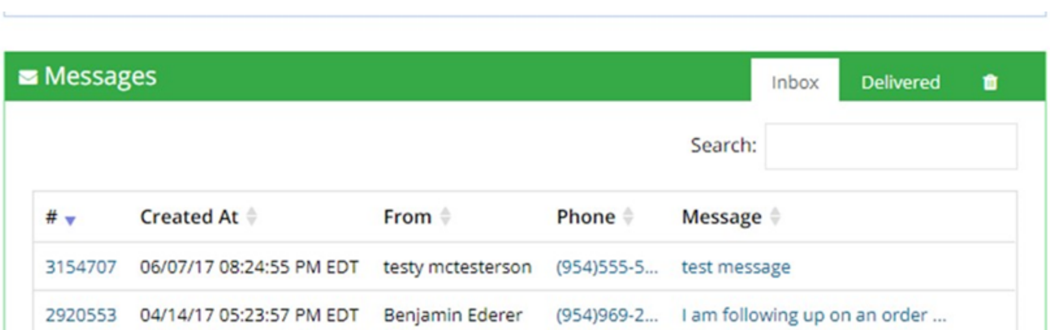
If the message is not in the Inbox, you should check the Delivered box. Messages in the Delivered box have already been acknowledged by our client.

SEARCH FOR MESSAGES

To search for a message, type in any information pertinent to the message in the search bar such as the caller's name, phone number, email address, etc.

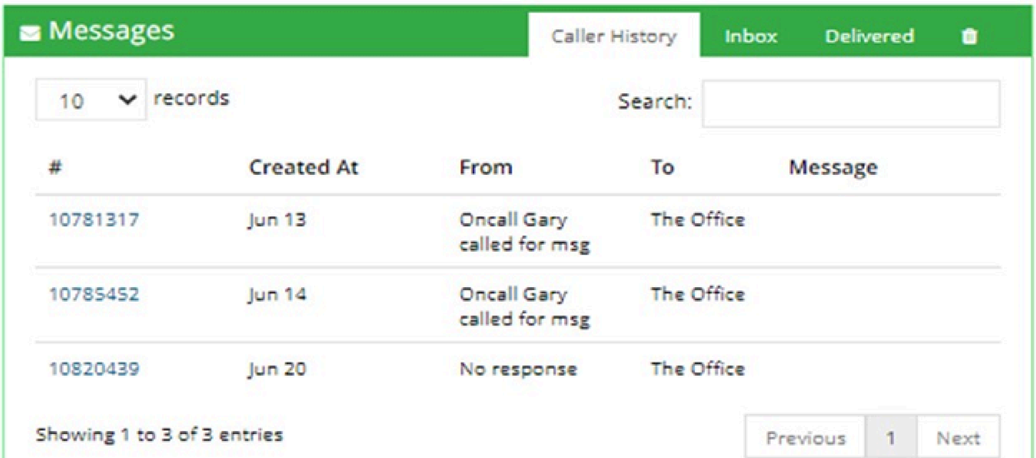
TRASH

There is also a Trash box which is indicated by the trash can icon. Here you will see what we call "non-messages". These are messages that do not typically get sent to a client because they do not contain any information such as a caller's name, phone number, etc.



CALLER HISTORY

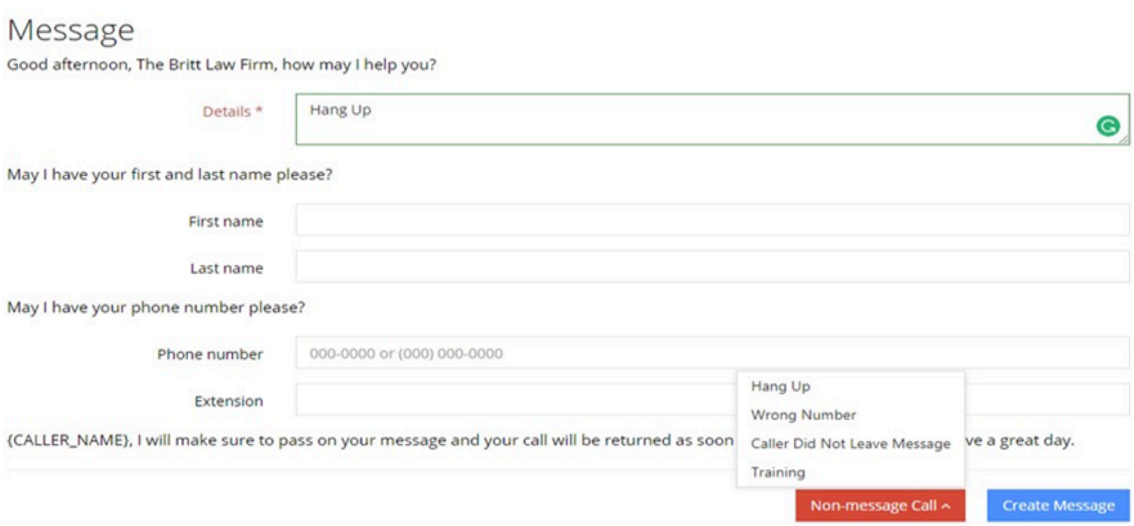
Sometimes you may see a third tab appear in the message area titled Caller History. This will appear if the caller has called the answering service previously and is based off of their caller ID. This can be useful to possibly check some info about their previous calls but should not be used in place of verifying all information and asking all questions.



NON-MESSAGES

Non-Messages: Hang-ups, "I'll call back", "never mind", fax tones, etc.

It is recommended to create all non-messages for logging and audit purposes. After completing the required fields, click the "non-message call" button and choose the appropriate disposition. Non-messages dispositions are configured in the Admin Portal.

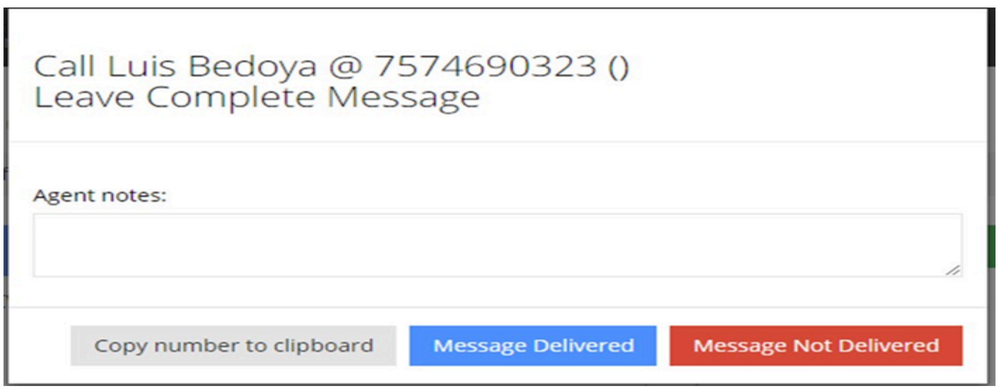


DISPATCHING

Through Liberty's script trigger automations, the guesswork is eliminated in relaying messages. Using logic-driven workflows, agents are no longer required to memorize complex scenarios for how and when to dispatch messages to your clients. Through Liberty, all message dispatching is pre-designed and automatically triggered based on answers to script questions, time of day, day of week, and more. Agents can focus on delivering a quality experience for your clients, while Liberty handles the complexities for you.

DISPATCHING AFTER CREATING A MESSAGE

After clicking "Create Message", if the instructions on the account require the agent to call or page the client, agents will be prompted to do so with a popup box seen below. To escape out of this box, for any reason, agents may hit the "Escape" key.



AGENT NOTES

After completing the recall, agents may fill in the "Agent notes" section with what transpired (i.e. Called Luis and gave him the message. Called Luis and left a complete message.)

MESSAGE DELIVERED

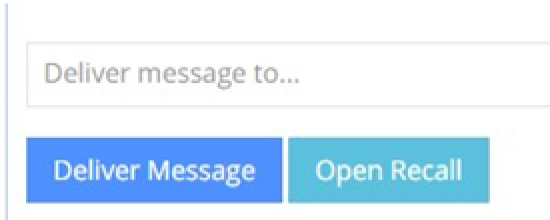
After speaking to a client and giving them a message, click Message Delivered.

MESSAGE NOT DELIVERED

If you leave a message for the client to call us back, click Message Not Delivered. If there is another step, the message will be sent to the recall queue for follow up.

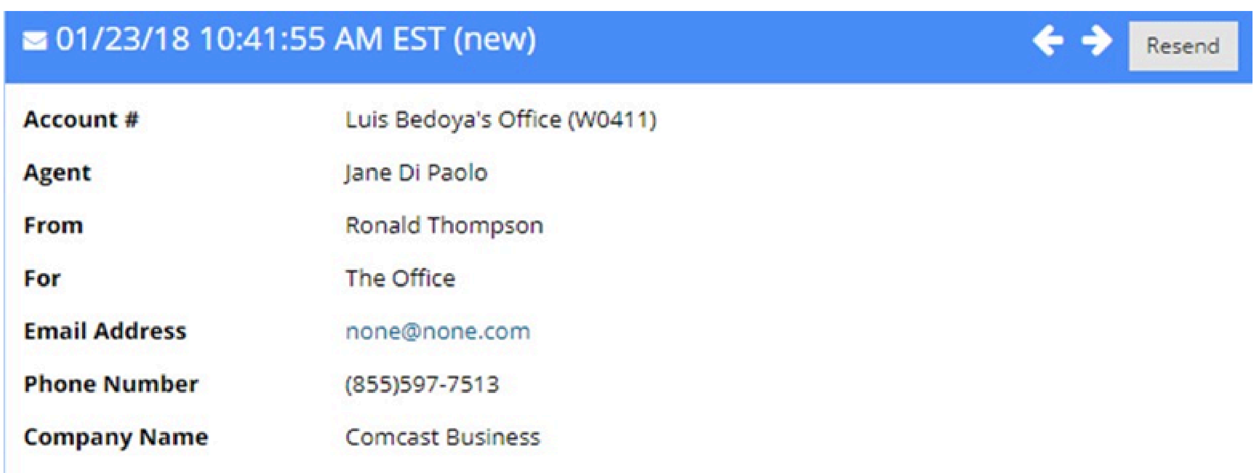
VERBALLY DELIVERING MESSAGES

- Locate the message on the Agent Dashboard or in the Inbox of the account.
- After verbally delivering the message, fill in the “deliver message to” field with the name of the contact you spoke with. Click the blue “deliver message” box.



ELECTRONICALLY DELIVERING MESSAGES

If a client requests an agent to resend a message, they can do so by locating the message in either the inbox or the delivered field. Once the message is located, click on the resend button. This only works for electronic delivery methods (SMS, email, Fax, etc).



PAGING MESSAGES

If the instructions are to page the client, the instructions should tell you what number to page the client with. After paging the client, it is recommended to note who was paged (Paged Dr Smith) and click “message not delivered” unless instructed otherwise. Clicking “message not delivered” will trigger the next step in the escalation process to ensure the client receives the message and puts the message in the recall queue so they can be followed with.

ACTIVITIES

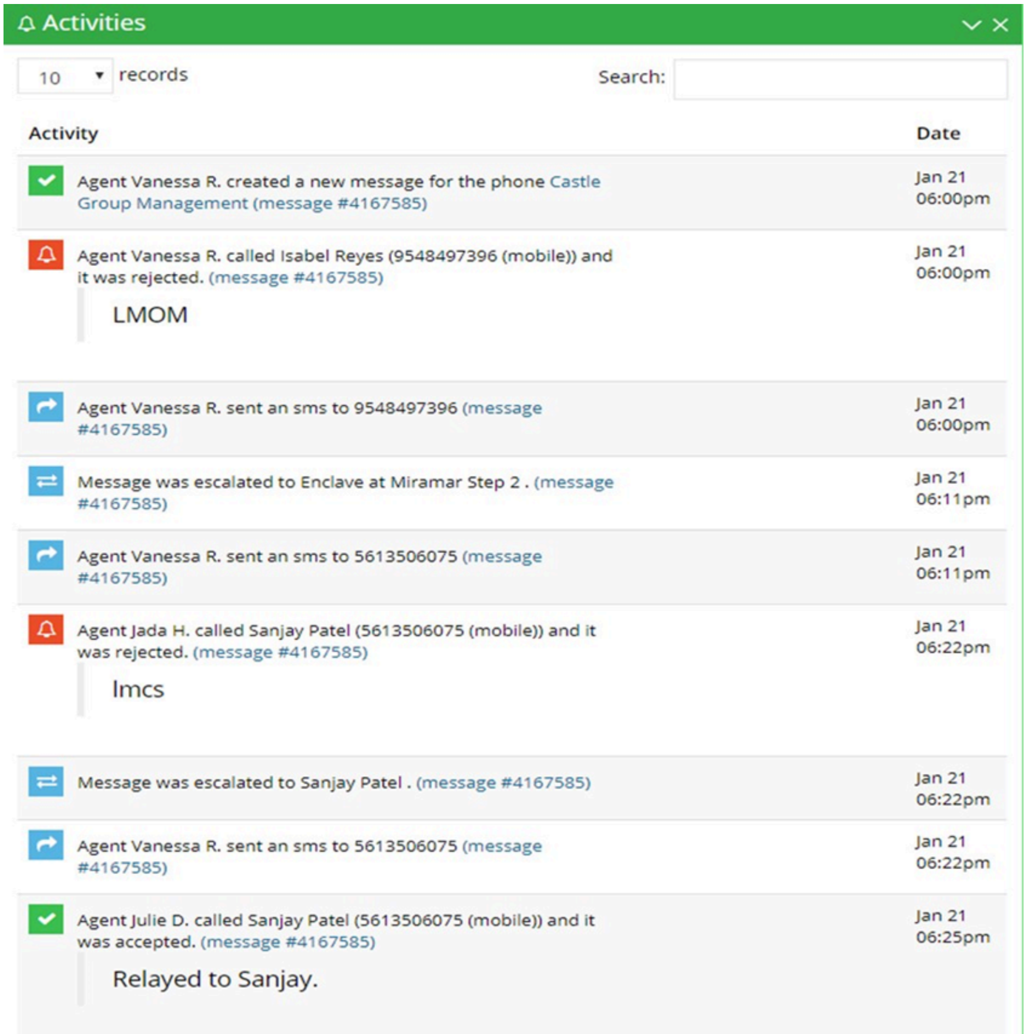
For every message; whether it's in the inbox or delivered box you can tell what steps were taken as far as dispatching the message is concerned, these are called activities. Once you click on the message number the entire message will be displayed as well as the activity log.

Types of activities and definitions:
Created a new message - this happens when the agent clicks the "create message" button
Email - email sent automatically via the system
Fax - fax sent automatically via the system
SMS (text) - SMS sent automatically via the system
SMS reply - the client replied to a SMS that was sent to them
Phone call - we called the client
Accepted - message was verbally given to the client
Rejected - message was not verbally given to the client
Escalated - message was not verbally given to the client and has been escalated to the next step in the relay

For the message below you can see that the message was created on January 21st at 6pm.

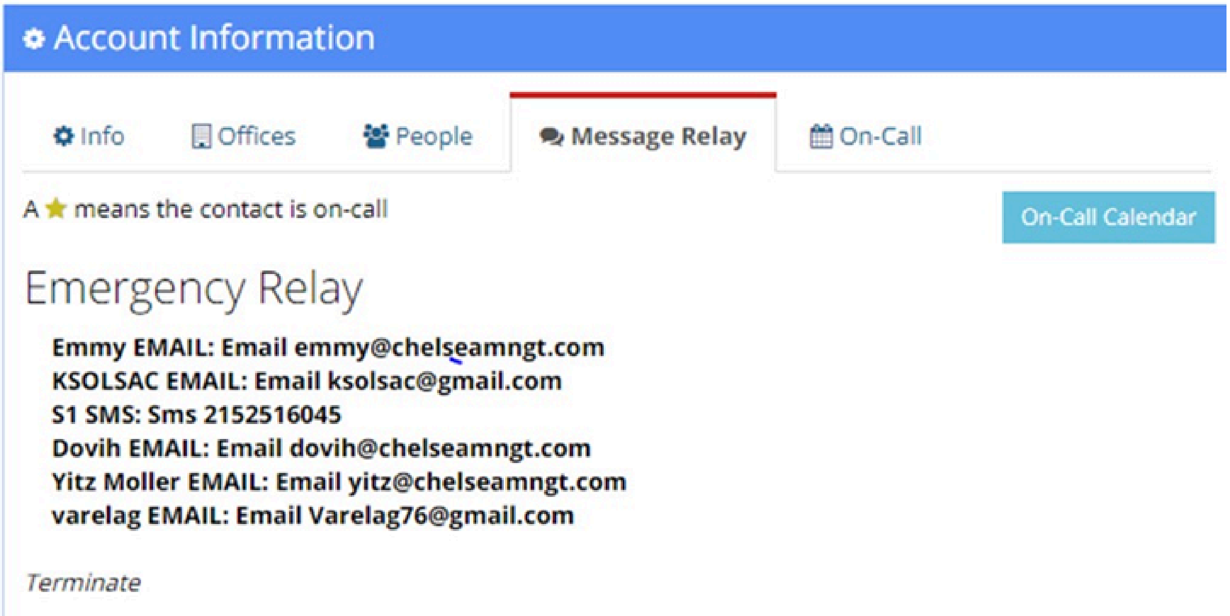
- The next step was to call Isabel on her mobile number.
- She did not answer so the agent left a message on Isabel's machine.
- Clicking Message Not Delivered triggered the relay to continue by sending an SMS to 9548497396 and escalating the message to Step 2 at 6:11pm.
- Sanjay was then called, but did not answer and was sent an SMS.
- Another agent called Sanjay and was able to give the message out so the call was delivered at 625pm.

Activities are available to the client to log what steps were taken when (who was texted, called, etc).

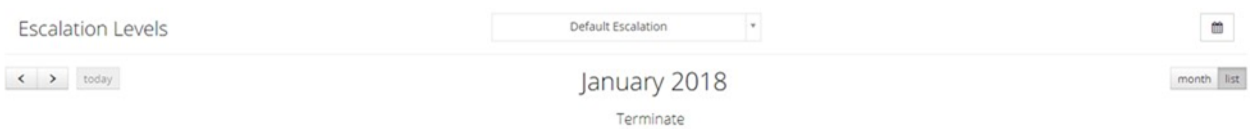


ON-CALL CALENDAR

From time to time a client may ask who is on-call for a particular time period (i.e. Who do you show on call for the weekend?). To view this information, go to the “message relay” tab under the account information section and click the “on-call calendar” button.



There are 2 different views to check for who is on call; month or list. This is located on the top right-hand side of the page.



Be sure to select the correct escalation calendar on the top of the page.

There are different delivery methods that are represented by icons.

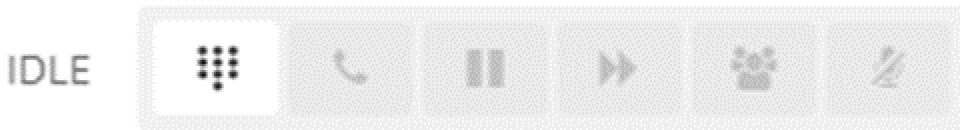
- Phone call/paging
- Email
- SMS
- Fax
- Notifier App

If the client asks who is on call be sure to look at the appropriate date and time frame to determine who is on call.

PHONE CONTROLS

Located on the top right of the Liberty Platform, the phone controls will aid you in transferring, conferencing, dialing out, and placing calls on hold. As you hover over the keys, you will see a tool tip explaining what the key does.

Make a call Hold Resume Conf Mute



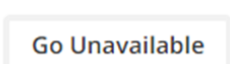
Transfer

STATUS BAR

- The status bar at the top of Liberty as well as the colors of the micro tabs will tell the status of an agent.
- To begin taking calls, change status by clicking the green “I'm Ready” button.

- Your status bar will turn green and say “Ready to accept calls”.

- Whenever in training, taking a break/lunch, etc. agents should change their status by clicking the white “Go Unavailable” button so they don't receive any calls.



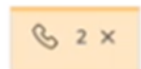
- The status bar will then turn red and say “Unavailable to accept calls”.

MICRO TABS

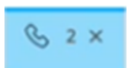
- Green micro tab = this is the call/account you are currently connected to.

- Red micro tab = the call on this account has ended.

- Yellow micro tab = this call/account is on hold.

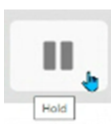


- Blue micro tab = this call/account has been transferred.



HOLD

- To place a caller on hold, click the Pause/Hold button.

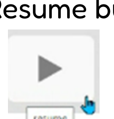


STACK CALLS

- To take another call after placing a caller on hold, click the green “I’m Ready” button.

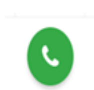
RESUME

- To take a caller off of hold, click on the appropriate micro tab and click the Play/Resume button.



CLICK TO DIAL

- To speed dial a number that is programmed in our system, click the phone number in Liberty and it will be copied to the dialer. Then click the green phone button to dial the number.

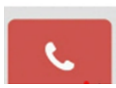


MANUAL DIAL

- To manually dial a number that is not programmed in our system, open the dialer by clicking the Make a call button then enter the phone number you wish to call. Click the green phone button to dial the number.
- To delete a digit if you put in a wrong number, press the backspace button on your keyboard or click the arrow button with the x on it.
- Outbound dials to US and Canada numbers should only include a 10 digit number without a 1 or +1.

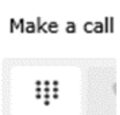
HANG UP

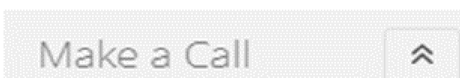
- To end the call, click the red hang up button.



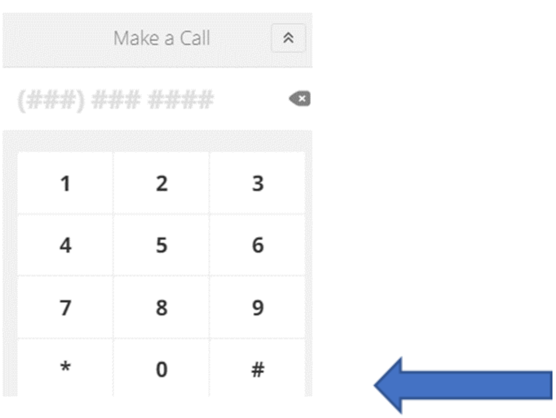
DIAL PAD

- To close the dial pad, click the Make a Call button or click the 2 arrows pointing up next to the words Make a Call.





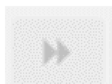
- Pound (#) and Star (*) which are used when we have to page a client. Open the dialer and click the corresponding symbol on the dialer.



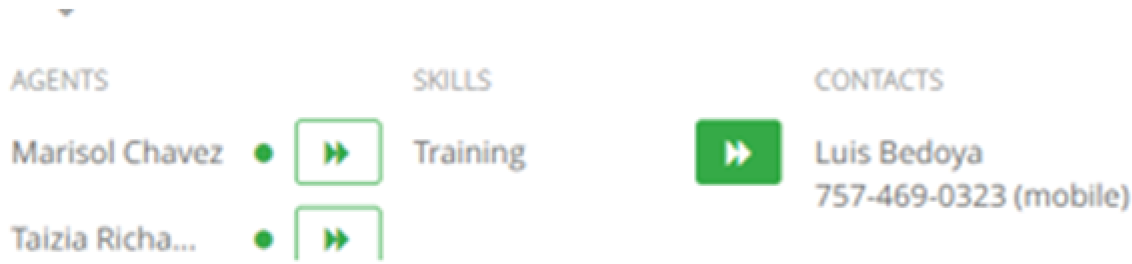
TRANSFERS

TRANSFER (QUICK STEPS)

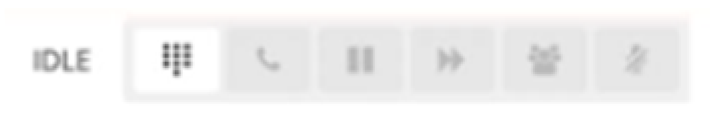
- Click the transfer button.



- Select who you are transferring the call to by clicking the green arrow next to the agent/skill/contact (our client).



- The call will stay on your screen until the agent/skill/contact answers the call. You can connect back into the line by pressing the play button to transfer the call to someone else.
- After a transfer is successfully completed your phone will return to the idle state and the micro tab will turn blue.

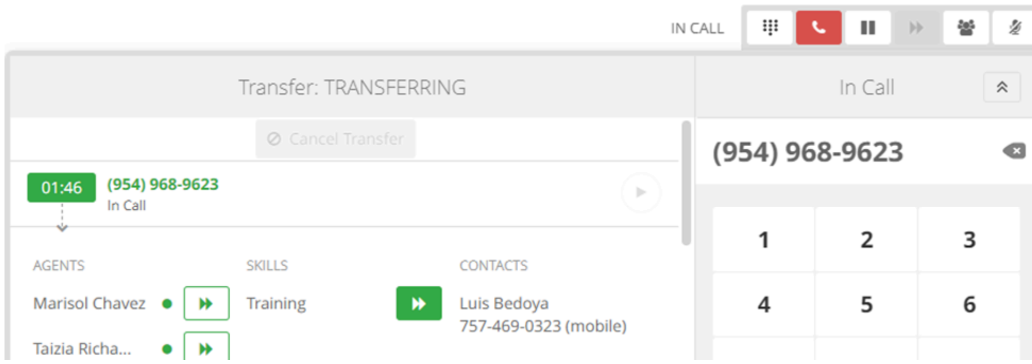


- Click the green “I'm Ready” button to take another call. You do not have to wait for the transfer to be completed.

TRANSFER (IN DETAIL)

Video: https://www.loom.com/share/67892ef7ca744f1db29c6f9b4e17a625

- Once you click the transfer button a transfer menu will appear.

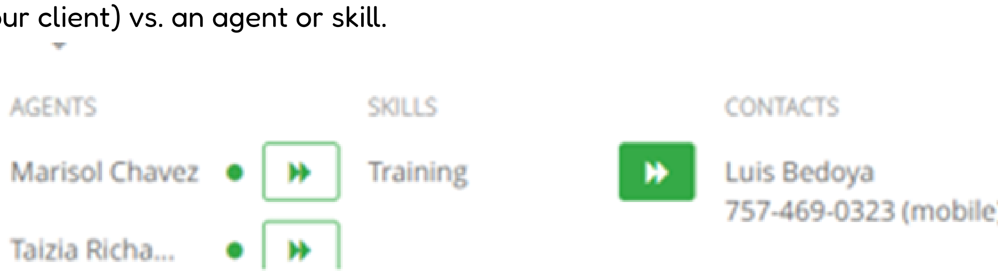


- There are several queues that you can transfer to (agents, skills, or contacts who are an on-call for the account).
- You can transfer to an agent whether they are available or not. A green dot signifies that the agent is available. A yellow dot signifies that the agent is not available but a call can still be transferred to them and once they become available it will be the first call they receive.
- Transferring a call to a skill will offer the call to all agents assigned that skill. For example, if you need a Spanish agent you can click on Spanish and the call will be offered to all Spanish agents instead of one particular Spanish agent.
- To transfer the call, simply click the green arrow next to the agent/skill/contact.

COLD TRANSFER (QUICK STEPS)

- Click the transfer button.

- Select who you are transferring the call to by clicking the green arrow next to the agent/skill/contact. Typically, with a transfer you would select a contact (our client) vs. an agent or skill.

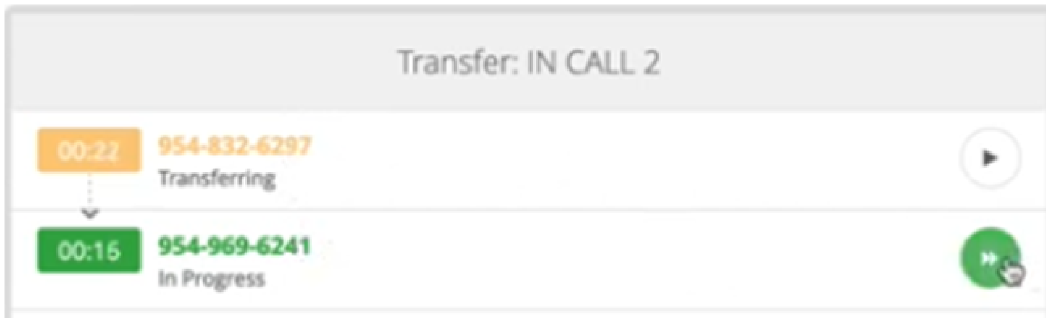


- Once the client answers, announce the caller.

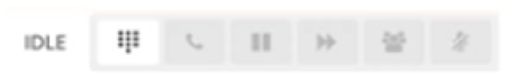
COLD TRANSFER (IN DETAIL)

- The process for a cold transfer is the same until you call a client.

- Once the client answers, announce the caller.
- If you are manually dialing a phone number or using the click to dial feature, once the call has been answered, you would click the green arrow to complete the transfer.



- If you need to toggle back and forth between the caller and the client you would click the play button on the appropriate line. Clicking the play button will automatically put the other call on hold. To complete the transfer/cold transfer, you would click the green arrow.
- After a transfer is successfully completed your phone will return to the idle state.



- Click the green “I’m Ready” button to take another call. You do not have to wait for the transfer to be completed.

BLIND TRANSFER

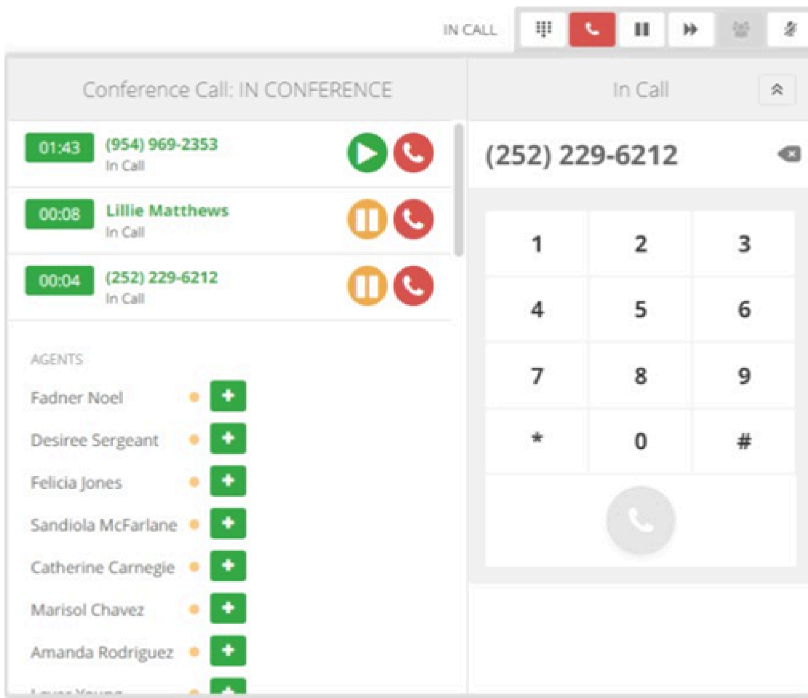
- The procedure is the same as a cold transfer except that we do not announce the caller to the client.
- Once the client answers, click the green play button on the client’s line (line 2).
- Click the green “I’m Ready” button to take another call.

CONFERENCING/WARM TRANSFER

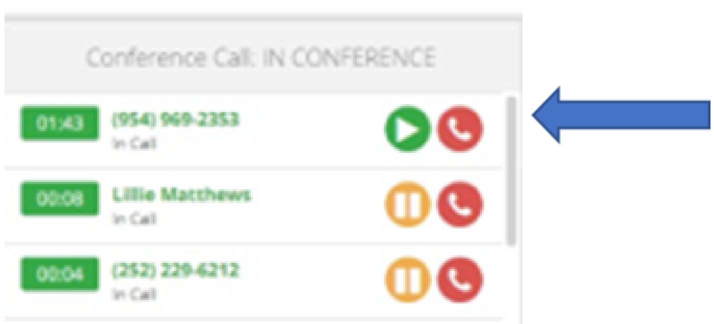
- After you announce to the caller that you will be connecting their call, place them on hold.

- Select the contact (client) you are connecting the caller to by either clicking the plus button, manually dialing the number, or using the click to dial feature in the Liberty Platform.
- Once you have the other party (client) on the line, introduce yourself as well as who you have waiting for them.
- Click the conference button.

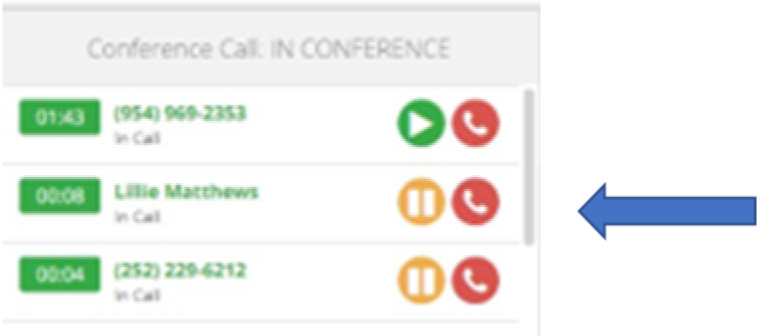
- You will see three lines on your screen. Line 1 is the caller, line 2 is you (agent), line 3 is the client.



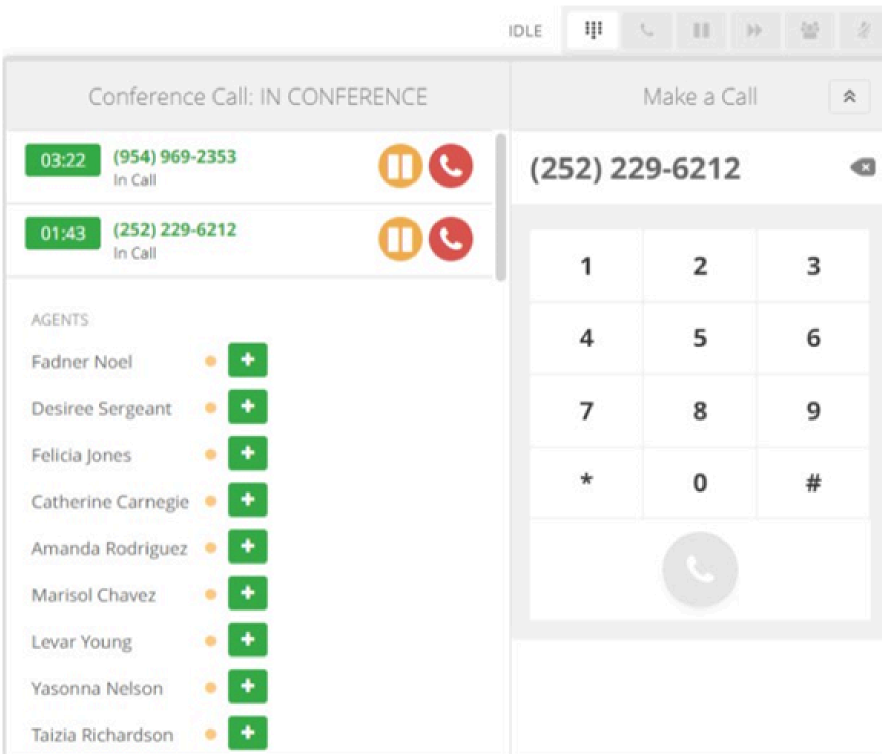
- Announce to the caller “I have _____ (Caller) from ____ (Company) on the line with us and I will connect you now.”
- Click the green play button on the caller’s line (line 1).



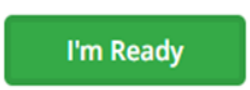
- Hang up on yourself (line 2).



- Now the client and caller are speaking to each other and you are disconnected from the conversation.

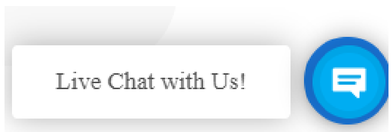


- The lines will disappear from your dialer once the client and caller hang up.
- Click the green “I'm Ready” button to take another call. You don't have to wait for the conference call to finish.



LIVE CHAT

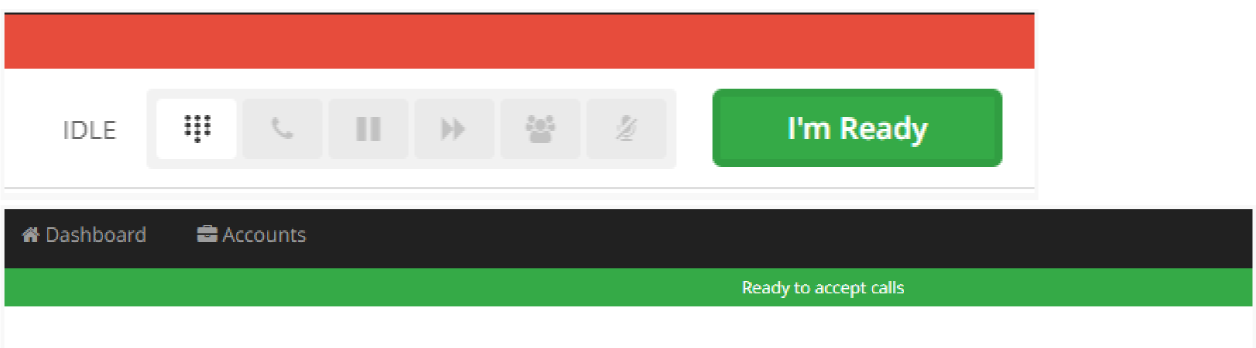
Provide a seamless and consistent experience no matter how customers communicate. Route incoming interactions to the next available skilled agent based with live chat enabled. With a unified ACD architecture, all sessions continuously populate within one browser tab to agents and are delivered to clients in the same ways they are used to receiving their calls. Login to the Liberty Platform. It is recommended to use the same 1 browser tab to handle chats and take calls.



*Watch Live Chat Video
https://drive.google.com/file/d/1w3NTV7bdOl8ihkblnM12y220k9ML9mpr/view?usp=drive_link

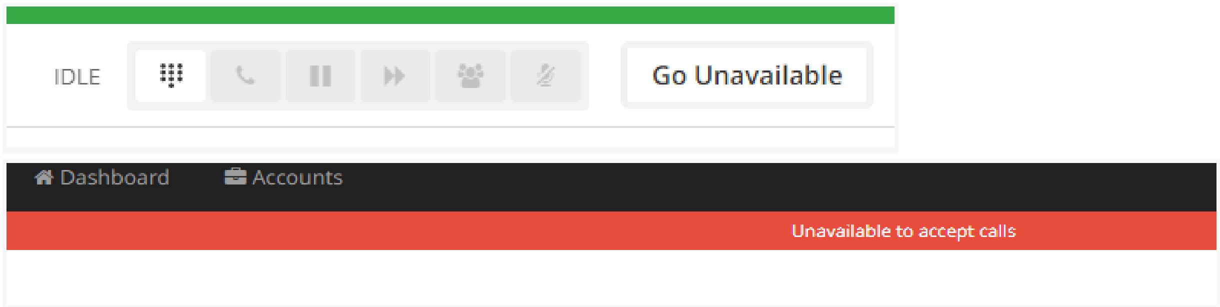
RECEIVING CHATS

After logging into Liberty, click the 'I'm Ready' button to accept chats. The top of the page will display a green bar and it will say 'Ready to accept calls'. Agents must have chat assigned to them in the Admin Portal to receive chats.



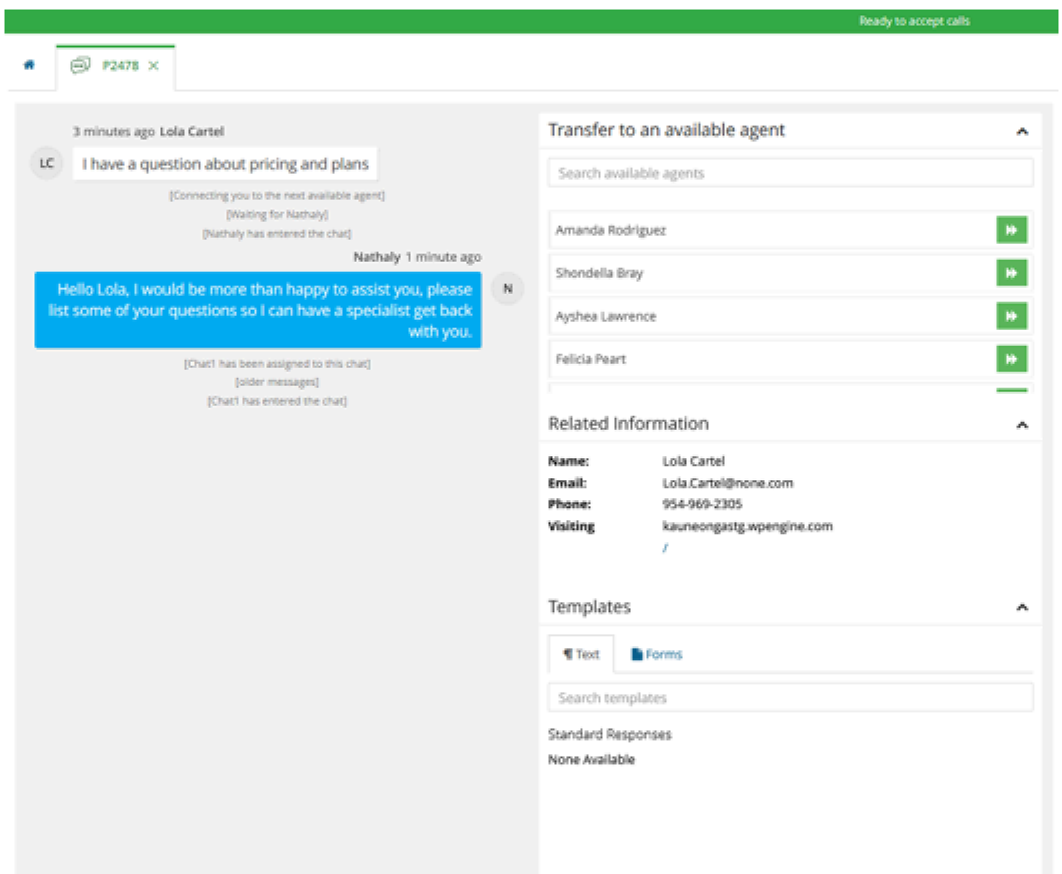
When a chat is started you will receive a popup notification in a new tab and a brief sound to alert you that a new chat has just been assigned to you, even if you are in the middle of taking a message or on a call. It will not interrupt your call. Note that the tab with the active chat is green, there is a chat bubble meaning it's a chat and the account number appears as well. Each chat, if you have more than one, will open in a new micro tab.

It is recommended to remain ready for your entire shift, unless you are leaving your desk. Anytime you are away from your desk, it is recommended to click 'Go Unavailable', so sessions do not get assigned to you while you are away. The top of the page will display a red bar and say ‘Unavailable to accept calls’.



VISITOR RESPONSE

The initial website visitor response will pop up automatically.



AGENT GREETING

- The chat agent could begin the conversation by greeting the customer, introducing themselves, and asking how they can assist if the customer has not already stated the reason for their inquiry.
    - "Hello (customer's name), this is (your name) & I will be assisting you today. How can I help you?"
- If the customer has stated the reason for their inquiry, the chat agent might begin the conversation with:
    - "Hello (customer's name), this is (your name) & I will be assisting you today."
- If the customer's name does not appear in the initial chat, the chat agent might want to ask for their name to personalize the conversation.

RELATED INFORMATION

- In the screenshot above, the customer's name, email, phone number and which website they are visiting, appears on the top right.

TEMPLATES

It is recommended to read the customer's question or inquiry before responding. There are templates housing text responses or forms (middle right) to use to communicate with the customer plus chat agents can chat freestyle. It is recommended to remain human and sound genuine. Not all questions or inquiries may have a fitting response, so sometimes agents might have to think outside of the box just like they do when handling phone calls. If there is not a fitting response or agents do not have the info the customer is looking for, they may simply let them know that they will have someone reach out to them for further assistance.

TEXT TEMPLATES

- Text templates are pre-canned responses that chat agents may use to answer FAQs and assist site visitors. In the composer (bottom left), agents can edit the text responses before sending. Agents may want to do this if the canned response does not quite fit what the customer asked.
    - Example:
        - The text response starts with "Great, allow me to…." Maybe it is not a "great" situation, so agents could replace the word "great" in the response with "thank you".
- Agents can search through the text responses by typing in keywords or scrolling through the list of responses.

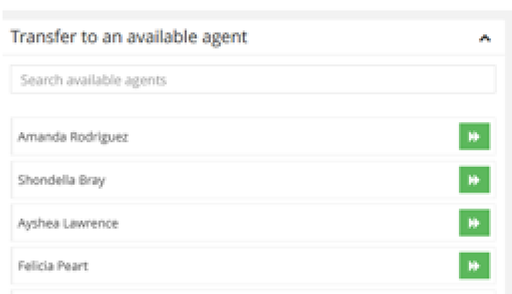
FORM TEMPLATES

- Form templates are pre-canned questions that chat agents may use to retrieve important information visitors.
  - Good Example:
    - The client requires an account ID to verify the visitor. An agent could send a form that says "What is your account ID?". This form would show as a field for the visitor to complete.
  - Poor Example:
    - Agent: Hi, May I have your name please? (CANNED FORM)
    - Customer: Can you tell me how much your services cost?
    - Agent: May I have your name please? (CANNED FORM)
- Forms cannot be unsent after clicking send.

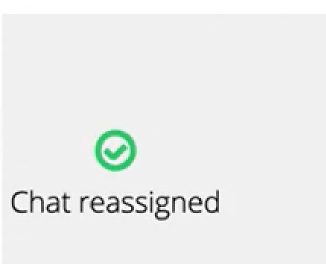
CHAT TRANSFERS

*Watch How to Transfer a Chat
https://drive.google.com/file/d/1A3o3vliBkc5Xkm6KktGiadOxzWZ1rx__G/view?usp=drive__link

If you ever need to transfer a chat to another agent, supervisor or manager click the transfer button in the chat window next to that person's name. This list updates dynamically according to who has made themselves available for chats by clicking the "I'm Ready" button.



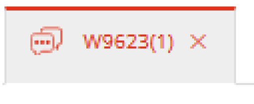
Once the chat is transferred you will see "Chat reassigned" in the chat window.



The chat can also be sent back to you if need be.

ENDING CHATS

- After an agent has assisted the visitor thoroughly, they could end the conversation by thanking the customer for their time & offer to follow up with additional info or assistance if needed.
    - “Thank you for your time today _______. I will have someone follow up with you.”
- After a chat is ended by a visitor or an agent, the tab turns red.

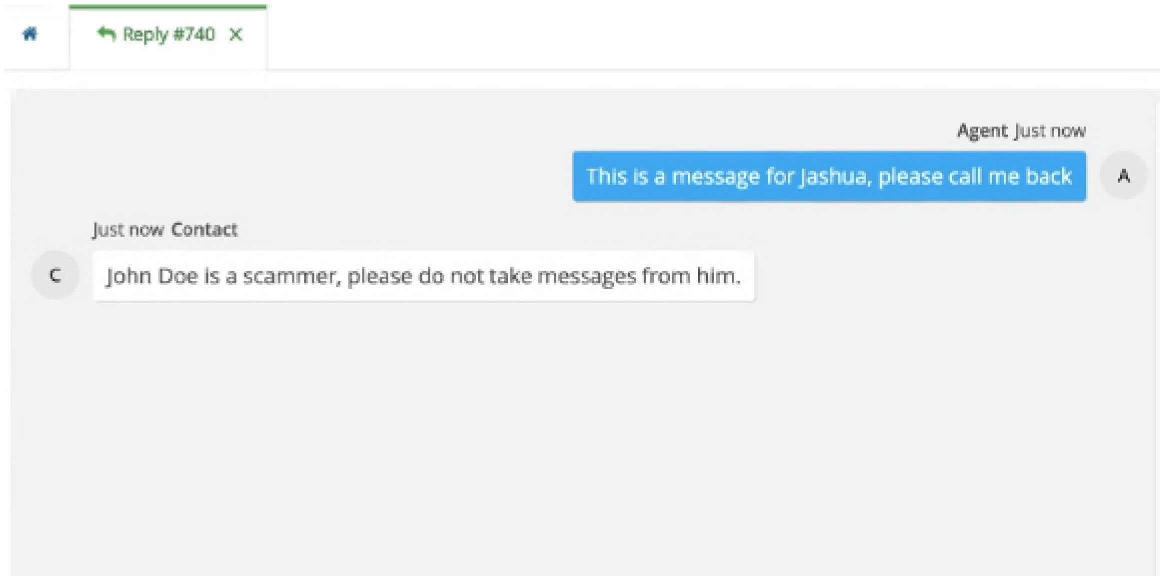


CREATING CHAT MESSAGES

After a chat is completed, agents should click “Create Message”. The message is then sent to the appropriate account’s message inbox on Liberty. Agents should almost always create a message. The main reason an agent would not create a message is if the chat is entirely blank from the very beginning and there is no information from the visitor at all. Most chats will at least have the caller’s name, phone number, & possibly an email address in the Related Information section. Even if the visitor does not respond initially or asks a question & disappears, the chat will more than likely contain their name, phone number, & email address which clients can use to reach out to them.

SMS REPLIES

You may get SMS replies from clients. It will appear very similar to how a live chat does.



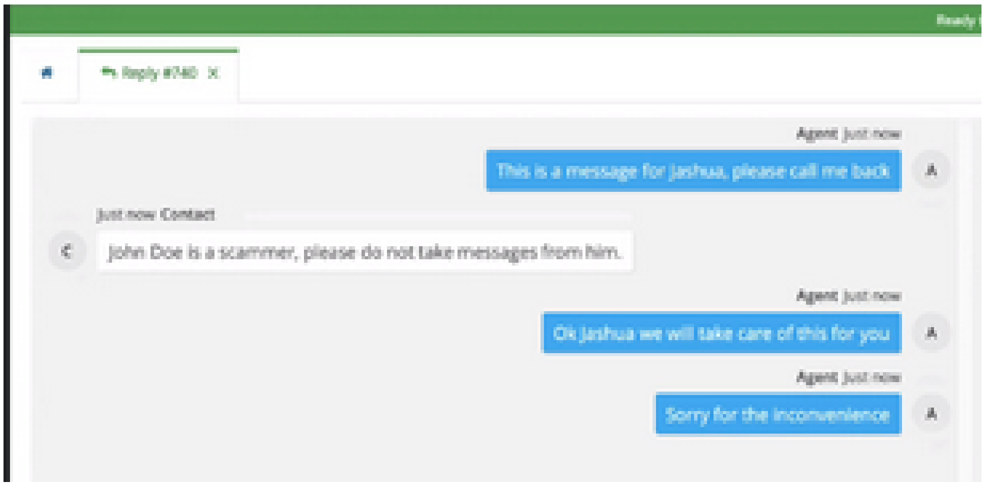
SMS ACKNOWLEDGEMENT

If a client replies with the predefined acknowledgement phrase such as "Got it" or “Okay” the message will be delivered out automatically. Acknowledgement phrases can be managed in the Admin Portal Preferences to select different phrases that will automatically acknowledge the message out per account.

SMS REPLIES QUEUE

Any other replies to an SMS message will queue an SMS reply and distribute this to agents based on their skills and channels assigned. If the client wants to acknowledge the message, then the agent should “deliver” the message to the person that is responding by selecting their name or typing it in. The SMS Reply will have the message ID number on the tab for reference.

If a client sends a reply that does not include the acknowledgement keyword(s), then agents should respond accordingly and take an appropriate next action. For example; if a client sends a reply such as “I can’t take this service call.” agents could reply “Thank you. We will contact the next person on-call.” and then follow up on that recall.



You can also see the activities that took place and a transcript of the conversation between the agent and the client. This appears once the chat has ended.