AGENT TRAINING USER GUIDE

Instant Chime for Microsoft Lync©

June 2015

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Introduction

This document is designed to help those who are configured as agents in Chime in the process of learning how to use Chime. We will provide information on how to accept chat requests from customers, viewing the agent dashboard and individual chat history, directions on how to install the agent context window as well as instructions for utilizing the context window and its various functions and features.

Installing the Agent Context Window

Follow these instructions to install the registry key and enable the agent context window in Lync:

1. **Log in** to the Chime application using your domain credentials (URL will look something like this: **http://192.168.1.81/chime**)
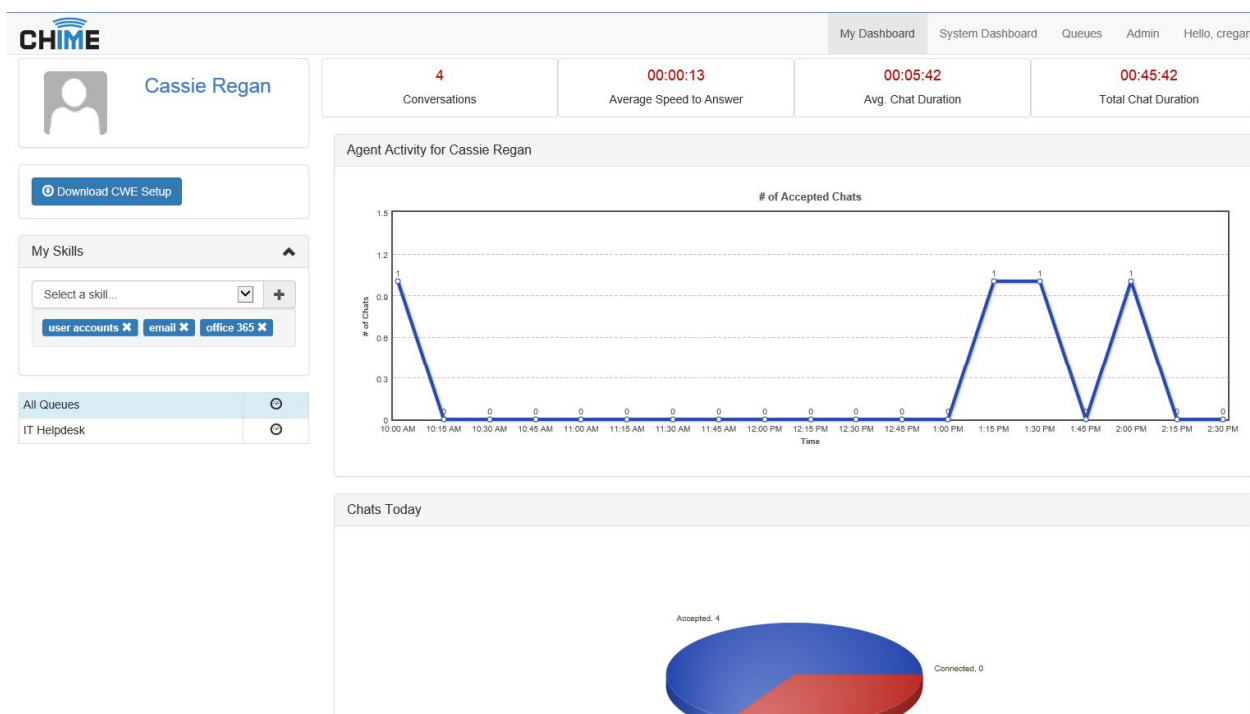2. Click on the '**Download CWE Setup**' button from the Agent Dashboard.

Figure 1: Agent Dashboard
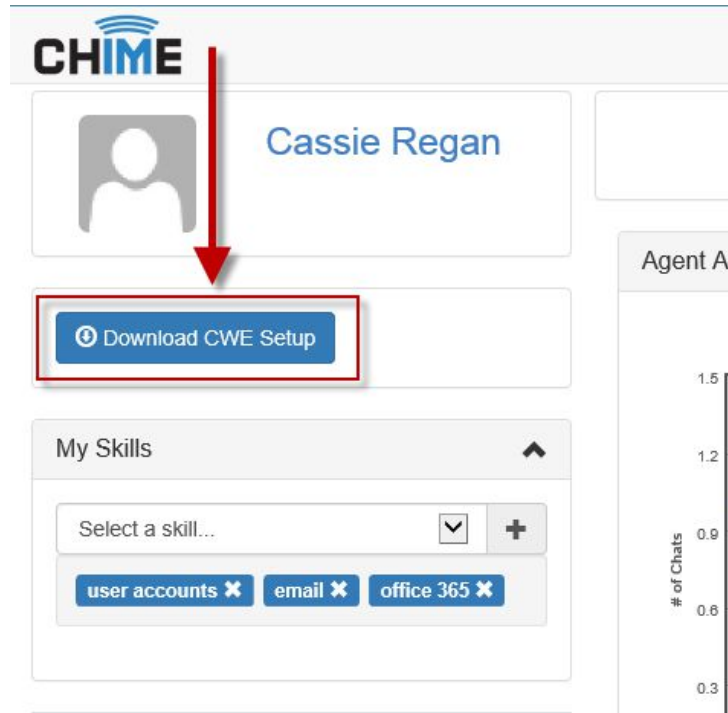
Figure 2: Download CWE Setup

3. Click '**Run**' when prompted to run or save **chime_agentsetup.exe** within the browser.
4. **Click on the size** you want the context window to be: **Medium or Large**.
5. **Click OK** once you are prompted with a window that says '**Success!**'.
6. The setup of the CWE is complete.

Accepting a Chat Request

As an agent who will be helping customers or seekers in Chime, you will be prompted in your Lync client with notifications of requests. To accept requests, you must be signed in to your Lync client and your status must be available.

Figure 3: Agent online and available

Follow these steps to accept a chat request:

1. **Click on the blue notification** in the bottom corner of the screen to open the chat window with the Chime dispatcher.

Figure 4: Chat Notification

2. **Type 'y'** in the new chat window to accept the chat request. **Note: You are not connected with the seeker yet, you must type 'y' to accept it first.**
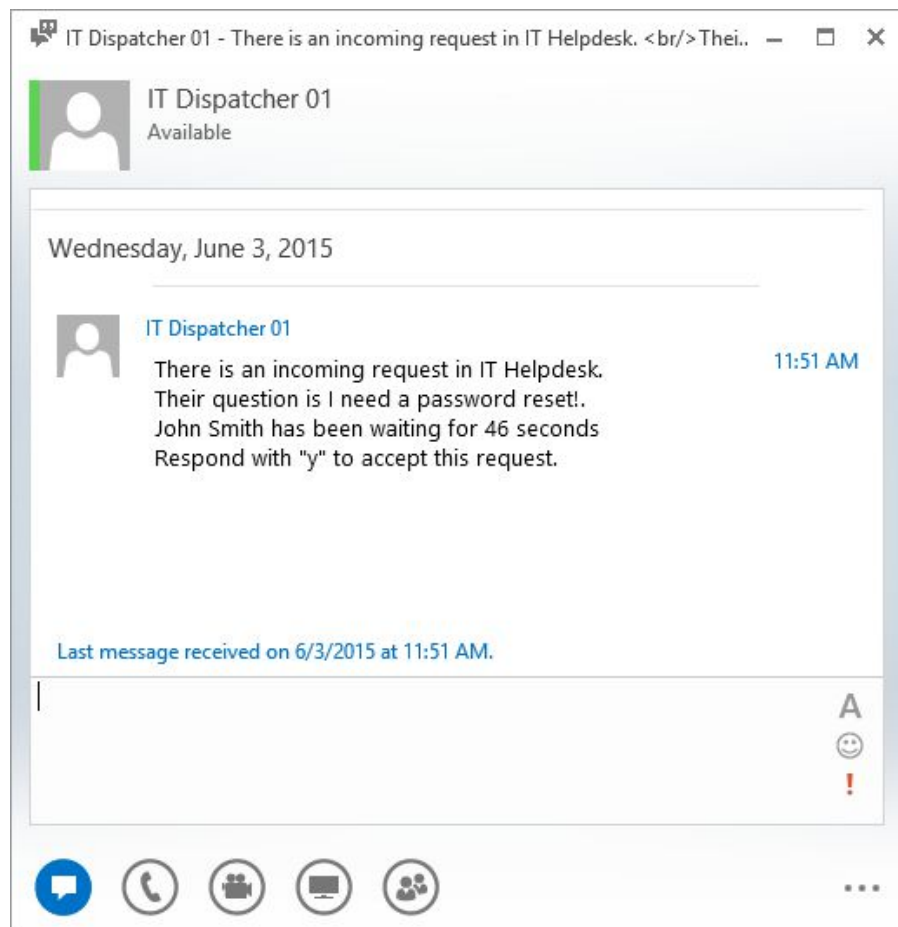

Figure 5: Incoming Request

3. You will receive a second notification for a group chat in the corner of your screen. **Click on this notification to open it. Note: This window is where you will be connected with the seeker and you will be able to chat with them.**

Figure 6: IM notification

4. **A second IM window will be opened** where you are joined into a conference with the seeker and the Chime dispatcher. You are now connected with the seeker. You should see their question, and you can now chat with them.
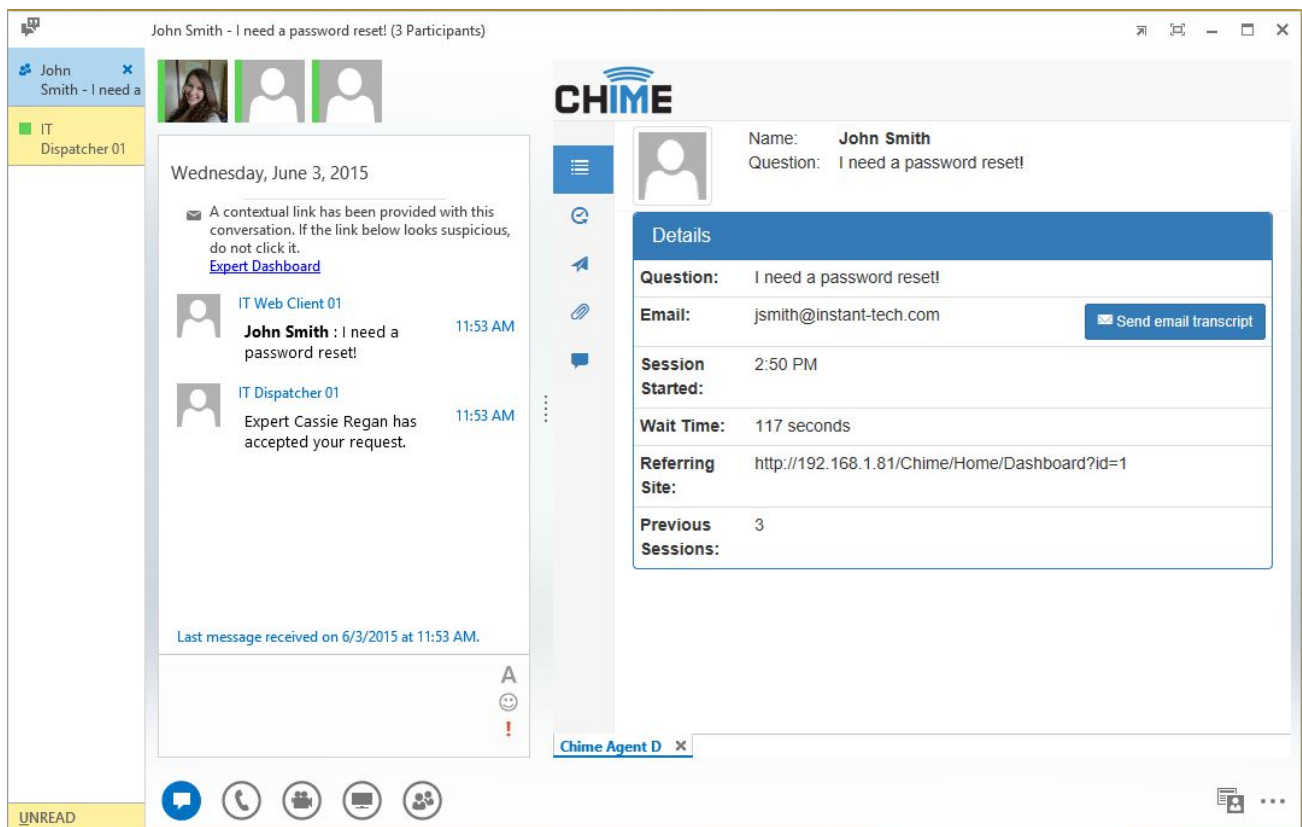

Figure 7: Seeker and agent chat window

Using the Agent Context Window

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

Details

The Details tab is the first tab that an agent sees in the context window when connected with a seeker. This window shows details about the seeker or customer, such as their full name, question, contact information, and wait time.

History

The History tab shows the previous questions that the seeker has had. **Click on the** **button** to view previous chats that the seeker has had.

Standard 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 customer. **Note: Standard replies must be added to queue settings by a manager or administrator.**

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 customers, and customers can send files to agents as well. **Click on the 'Upload' button** to send a file to a seeker. Click on the 'Refresh' button to reload the list of files, if any have been uploaded.

Comments & Tags

In the Comments & Tags section, agents can mark sessions as resolved as well as attach session tags to the session. Resolved/unresoloved, session tags, and comments will all show up in chat history.

Click on the 'Unresolved' button to toggle and change a session to 'Resolved'.

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 seeker had. Ex: *I gave him a password reset and he is all set now, I gave her a license key for Microsoft Office…*