



**CHIME**

# Instant Chime for Teams **MANAGER TRAINING** **ADVANCED**



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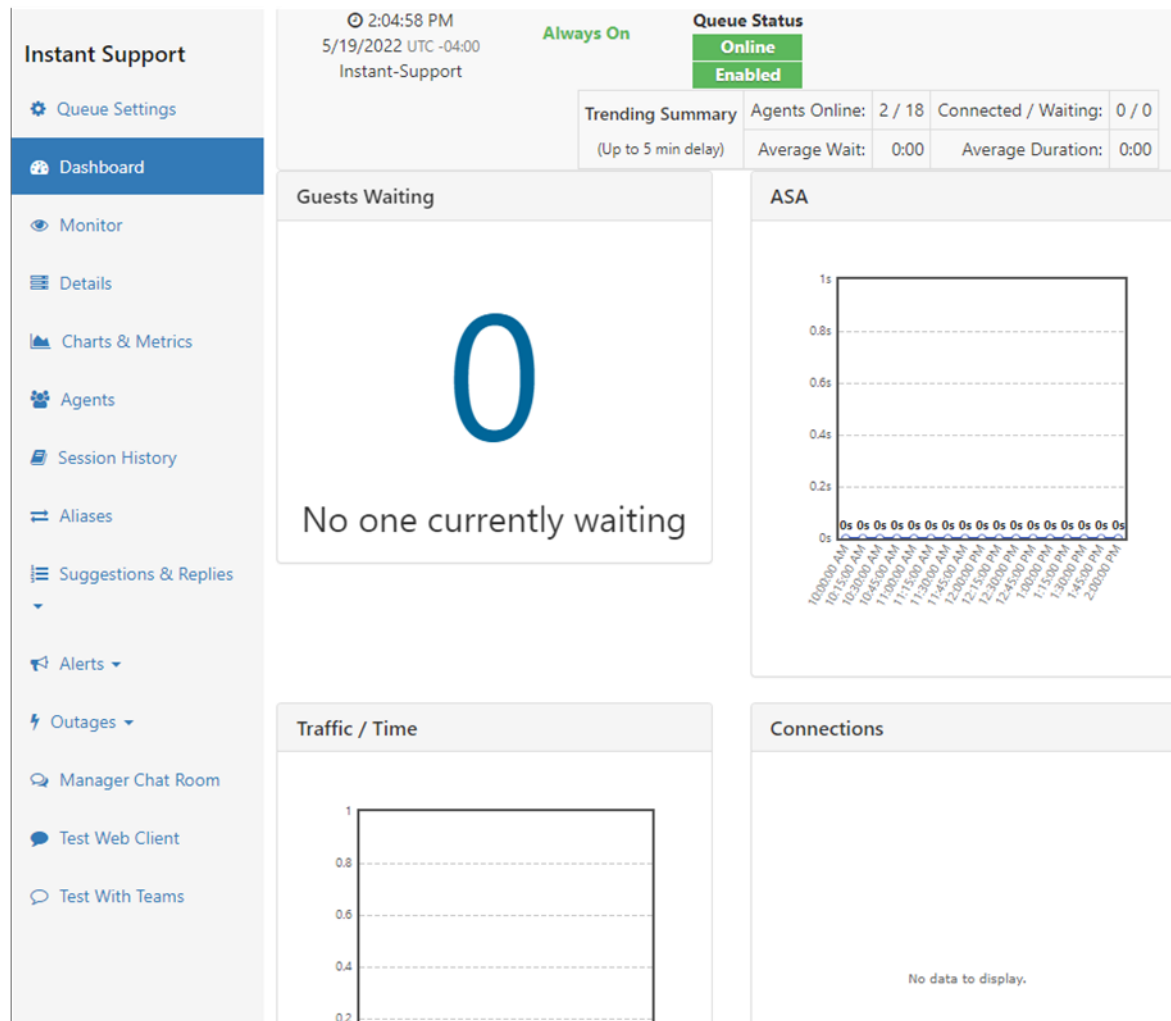




- Integration
  - Set up a bot
  - Set up a virtual agent
- Cognitive
  - Add a knowledge base
- Text resources
  - Customize resources
  - Create adaptive cards
- Deflection
  - Set deflection type and response
- Routing
  - Set routing method
  - Set Teams and tag settings
- Interview
  - Customize dialogue cards
- Advanced
  - Set timeout email

## Queue dashboard features:

- Suggestions & Replies
- Aliases
- Alerts
- Outages





What: Prewritten replies that are available for all agents within a queue

Why: So, agents have quick replies to use for common responses and to escalate to a screenshare

- Create reusable prewritten replies for agents for a queue
- Agents can edit replies before sending
- Reply Types:
  - Adaptive Card
  - Weblink (Teams invite)
  - Video
  - Text

# Create Standard Replies

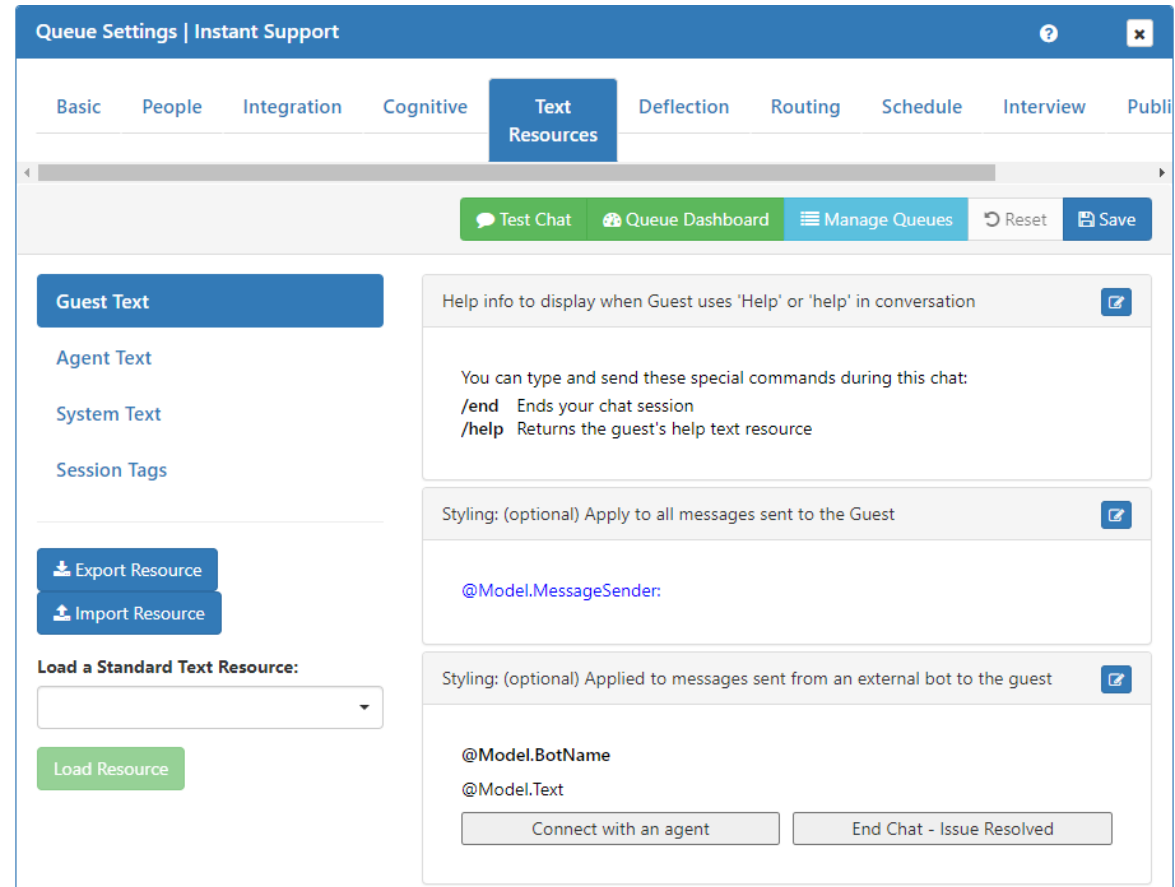
The screenshot displays the 'SLB Example Queue' interface. At the top, it shows the queue name, a robot icon, and status information: 'Always On', 'Queue-Dispatcher-1', and 'Queue Status: Online Enabled'. A 'Trending Summary' table shows 'Agents Online: 3 / 5', 'Connected / Waiting: 0 / 0', 'Average Wait: 0:18', and 'Average Duration: 6:36'. Below this is the 'Standard Reply Editor' with fields for 'Title' (Password Reset), 'Reply Type' (TXT), and 'Language' (English). The 'Reply Message' field contains a link to a password reset article. A 'Preview Text' button is visible. At the bottom, there are buttons for 'Download Replies (json)', 'Import Replies (json)', 'Copy Replies to Other Queues', and a red-bordered '+ New Standard Reply' button. A table on the right lists existing replies with columns for 'Type', 'Edit', and 'Remove'. A red arrow points to the '+ New Standard Reply' button.

# Queue Settings – Text Resources

What: Text or adaptive card that is displayed for/after each action

Why: So, the queue has a set of common responses for the life cycle of a chat

- Customize messages that Chime uses when connecting users via chat
- Import/Export Resources
- Create Adaptive Cards
- For more information about adaptive cards refer to: <https://adaptivecards.io/> and <https://www.madewithcards.io/>
- Add Session Tags



Queue Settings | Instant Support

Basic People Integration Cognitive **Text Resources** Deflection Routing Schedule Interview Public

Test Chat Queue Dashboard Manage Queues Reset Save

Guest Text

Agent Text

System Text

Session Tags

Export Resource

Import Resource

Load a Standard Text Resource:

Load Resource

Help info to display when Guest uses 'Help' or 'help' in conversation

You can type and send these special commands during this chat:

- /end Ends your chat session
- /help Returns the guest's help text resource

Styling: (optional) Apply to all messages sent to the Guest

@Model.MessageSender:

Styling: (optional) Applied to messages sent from an external bot to the guest

@Model.BotName

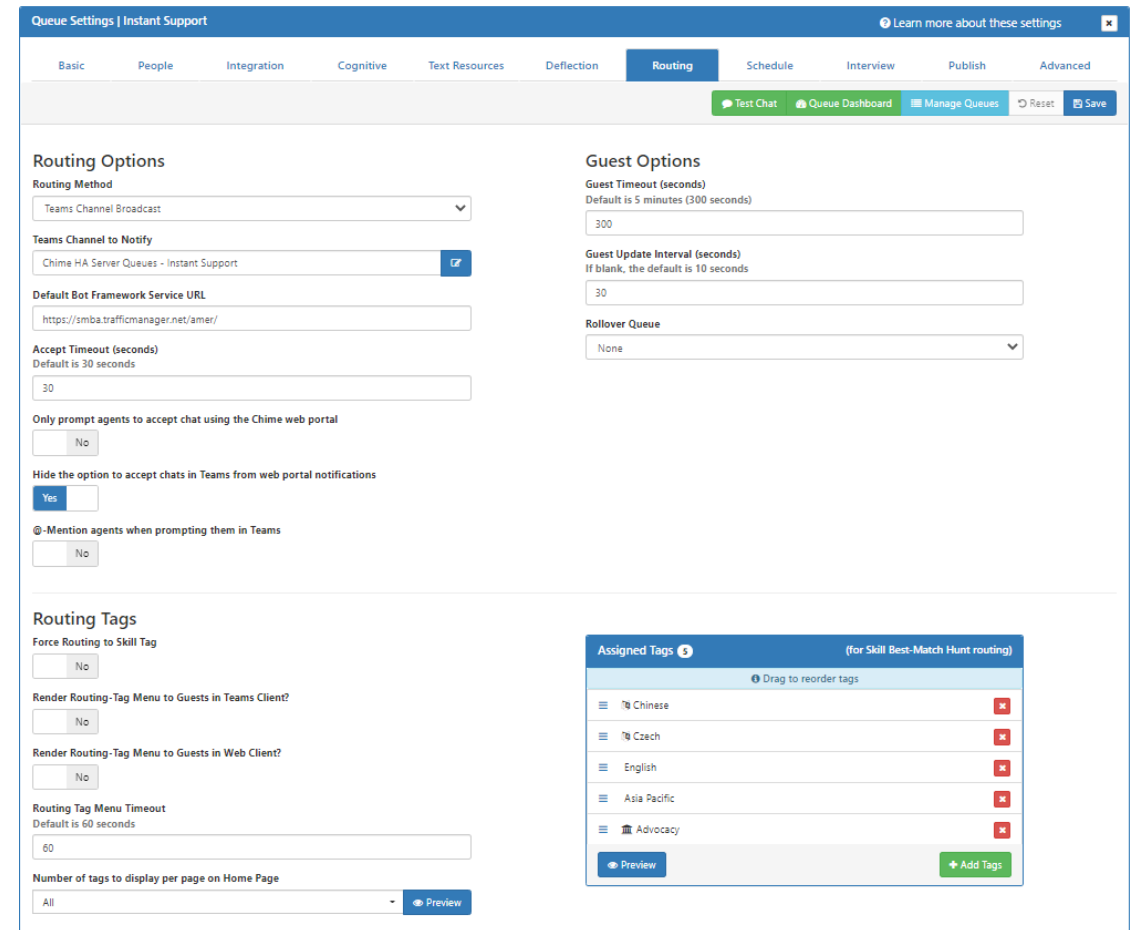
@Model.Text

Connect with an agent End Chat - Issue Resolved

What: Controls how chats are routed to agents

Why: Cover different routing types

- Styles of chat routing:
  - Teams channel broadcast
  - Teams Hunt Routing
- Select chat prompt settings
- Select routing tag settings
- Ability to rollover to another queue on timeout



Queue Settings | Instant Support

Basic People Integration Cognitive Text Resources Deflection **Routing** Schedule Interview Publish Advanced

Test Chat Queue Dashboard Manage Queues Reset Save

### Routing Options

Routing Method: Teams Channel Broadcast

Teams Channel to Notify: Chime HA Server Queues - Instant Support

Default Bot Framework Service URL: https://smba.trafficmanager.net/amer/

Accept Timeout (seconds): 30

Only prompt agents to accept chat using the Chime web portal: No

Hide the option to accept chats in Teams from web portal notifications: Yes

@-Mention agents when prompting them in Teams: No

### Guest Options

Guest Timeout (seconds): 300

Guest Update Interval (seconds): 30

Rollover Queue: None

### Routing Tags

Force Routing to Skill Tag: No

Render Routing-Tag Menu to Guests in Teams Client?: No

Render Routing-Tag Menu to Guests in Web Client?: No

Routing Tag Menu Timeout: 60

Number of tags to display per page on Home Page: All

### Assigned Tags (for Skill Best-Match Hunt routing)

Drag to reorder tags

Chinese	✕
Czech	✕
English	✕
Asia Pacific	✕
Advocacy	✕

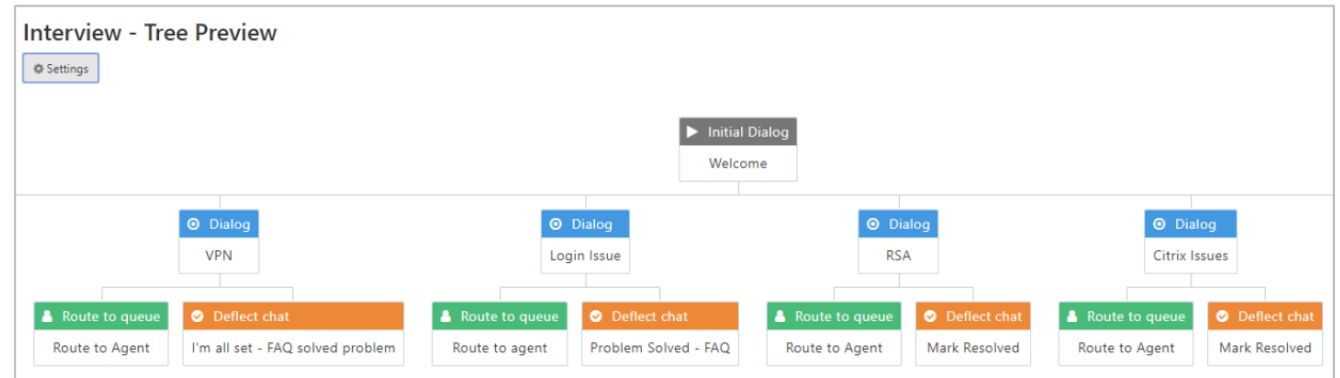
Preview Add Tags

## Queue Settings - Interview

What: Chat workflow without any programming

Why: Help navigate the incoming chat to the correct queue, agent, external bot, or FAQ

- Create custom chat workflow within a queue similar to IVR
- Route to:
  - Another Queue
  - Agents
  - External Bots
  - FAQ



Choices Radio Buttons

<input type="checkbox"/> Avaya/Shortel PBX	Go to Dialog	Avaya/Shortel PBX
<input type="checkbox"/> VPN	Go to Dialog	VPN
<input type="checkbox"/> Login Issue	Go to Dialog	Login Issues FAQs
<input type="checkbox"/> RSA	Go to Dialog	RSA Faqs
<input type="checkbox"/> Citrix Issues	Go to Dialog	Citrix
<input type="checkbox"/> Laptop	Go to Dialog	Laptop Issues
<input type="checkbox"/> IT Service Desk Directly	Route To Queue	LOAD TEST - IT Service Desk



What: Attach an outage notification to the queue that will display at start of chat

Why: If people are coming in about a known issue or outage, they will receive information before routing to an agent in case they want to deflect

- See details of create outages in Outage History
- Outages will show as user is coming into a chat session

Create an outage...


**Outage Title:** (Max: 250)  
Outage Title:

**Outage Details:** (Max: 5000)  
Outage Details:

**Outage Type:**  
 Unplanned  
 Planned

Active 4	Upcoming 1	Resolved 1	All 6	Showing All	Select
Start: March 14, 2016 1:45 PM	Title: Weekly server outage test	Created by: Justin Moore	Delete		
Start: March 14, 2016 1:43 PM	Title: Seekers Cannot Access Email	Created by: Patrick Madden	Delete		
Start: March 14, 2016 1:42 PM	Title: Backup server will be temporarily be going down	Created by: Justin Moore	Delete		
Start: March 14, 2016 1:41 PM	Title: Snow Storm Today	Created by: Patrick Madden	Delete		
Start: March 26, 2016 12:00 AM	Title: Planned outage during Easter	Created by: Justin Moore	Delete		
Start: January 14, 2016 11:55 AM	Title: Server is down	Created by: Andrew Robertson	Delete		

Start: Sep 28, 2016 10:42 AM Title: Weekly Server Outage test Created by: Patrick Madden

Created by:  Start: Sep 28, 2016 10:42 AM Stop: Unknown

**Weekly Server Outage test**  
Weekly test is under way



What: Option to deflect incoming chat sessions

Why: Automatically (for some managed shutdown of queue)

- Based on conditions (Razor with variables)
  - Too many waiting guests
  - Not enough agents
  - Time of day
- Display a message or card back to the guest
- Attach a comment automatically to the session

## Auto-Deflection Settings

No Automatic Deflection

Deflect All Chats

Conditionally Deflect Chats

Chat will deflect if this expression evaluates to True

```
@{
//Deflection based on total session count
var deflect = false;
var totalsessions = @Model.TotalSessionCount;

if(totalsessions > 30)
    deflect = true;
}
```

@deflect

# Deflection Feature

## Message When Chat is Automatically Deflected

Chat Has Been Automatically Deflected

### There are currently too many people waiting

There are already @Model.TotalSessionCount people ahead of you in line. Please come back later when the service desk has more availability

We have your initial question and email to follow up with you. If you would like to enter a longer question, please enter it below

Please enter your question here

Submit

## Auto-Deflection Comment

Comment Recorded in Chat Session Metadata When Automatically Deflected

User @Model.SeekerFullName (@Model.SeekerEmail) came in at (@Model.CurrentTime) asking: @Model.SeekerQuestion while there were already @Model.TotalSessionCount users in the queue

If you are enabling auto-deflection to deal with increased chat volumes because of a known issue, consider creating an Outage message to help inform users about current conditions.

Create Outage

What: Attach additional botframework services to a queue

Why: So, agents can accept concurrent/multiple chats at one time

- View current status of dispatchers
- View number of active chats per dispatcher

The screenshot displays the 'Instant Support' dashboard with the 'Aliases' menu item selected. The main content area shows the 'Dispatcher Aliases' section for the 'Instant-Support' queue. At the top, it indicates the queue is 'Always On' and 'Queue Status' is 'Online Enabled'. A 'Trending Summary' table shows 3 agents online out of 18, with 0 connected and 0 waiting. Below this, a table lists the alias 'Instant-Support-2' with a state of 'Online' and a status of 'Endpoint is connected', currently having 0 active chats. A refresh icon is present next to the active chats count. A footer note states the data was last updated on May 20, 2022 at 1:22:06 PM and will be updated again in 50 seconds.

Alias Dispatcher URI	State	Status	Active Chats
Instant-Support-2	Online	Endpoint is connected	0

- Add suggestions or prewritten common questions and answers without starting a chat
- Suggestions can be added on skill tags for each queue

### New Suggestion

**Title:** (24 / 50)  
How to Install a Printer

**Language:**  
English

**URL:** (84 / 500)  
w8.hp.com/us/en/campaigns/wireless-printing-center/printer-setup-help2.html [Test](#)

**Type:**  
Hyperlink

**Description:** (81 / 250)  
The following line will teach you how to install a wireless Printer on a computer

Assign This Suggestion To The Tag:  Copy This Suggestion To Other Tags?

[Hardware](#)

[Cancel](#) [Save](#)

### Suggestions

Order suggestions on Home page by: [Order](#) Show General Info suggestions? [Hide](#) Suggestion Display Type: Collapsible [Preview](#)

Select Tag: [Advocacy](#)

[Advocacy](#) 0 [All Assigned](#) 0 [General Info / Unassigned](#) 0 [Archived](#) 0

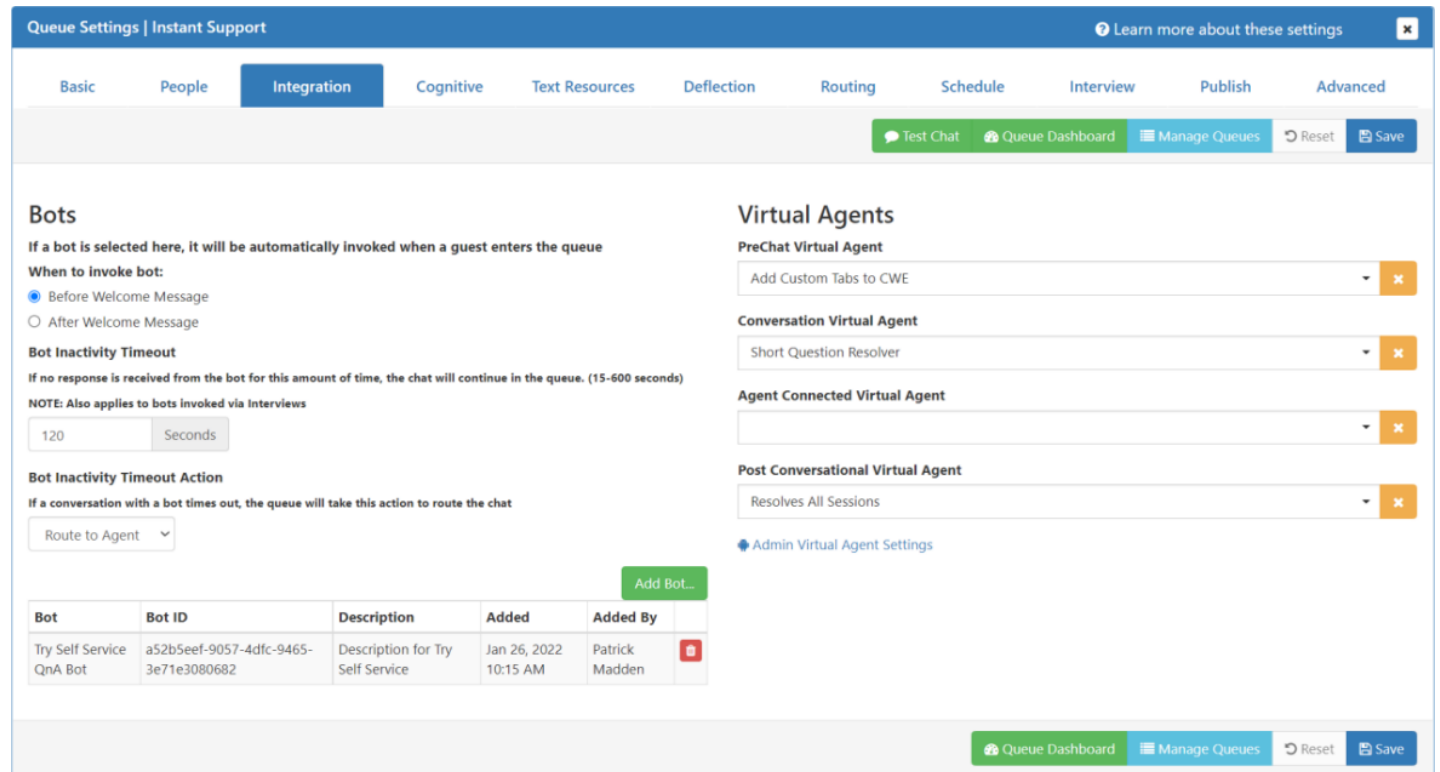
[Change Order](#) [+ Add Suggestion](#)

Search suggestions...

Title	Description	Link	Type	Creator	Date Created	Like	Dislike	Edit	Archive
<p><a href="#">Advocacy</a> has no assigned suggestions. Managers/Admins can add new suggestions by clicking the <a href="#">+ Add Suggestion</a> button above.</p>									

# Queue Settings - Integration

- What: Integrate with external bots and external ticketing systems
- Why: Help with self service deflection and integrate with ticketing
- External Bots:
  - Bots can be called before and after the welcome message
  - Bots are registered in the Admin area
- Virtual Agents
  - Integrate with Servicenow, Solarwinds, SMAX, Footprints, & SMTP



Queue Settings | Instant Support Learn more about these settings

Basic People **Integration** Cognitive Text Resources Deflection Routing Schedule Interview Publish Advanced

Test Chat Queue Dashboard Manage Queues Reset Save

### Bots

If a bot is selected here, it will be automatically invoked when a guest enters the queue

**When to invoke bot:**

Before Welcome Message  
 After Welcome Message

**Bot Inactivity Timeout**  
 If no response is received from the bot for this amount of time, the chat will continue in the queue. (15-600 seconds)  
 NOTE: Also applies to bots invoked via Interviews  
 120 Seconds

**Bot Inactivity Timeout Action**  
 If a conversation with a bot times out, the queue will take this action to route the chat  
 Route to Agent

[Add Bot...](#)

Bot	Bot ID	Description	Added	Added By
Try Self Service QnA Bot	a52b5eef-9057-4dfc-9465-3e71e3080682	Description for Try Self Service	Jan 26, 2022 10:15 AM	Patrick Madden

### Virtual Agents

**PreChat Virtual Agent**  
 Add Custom Tabs to CWE

**Conversation Virtual Agent**  
 Short Question Resolver

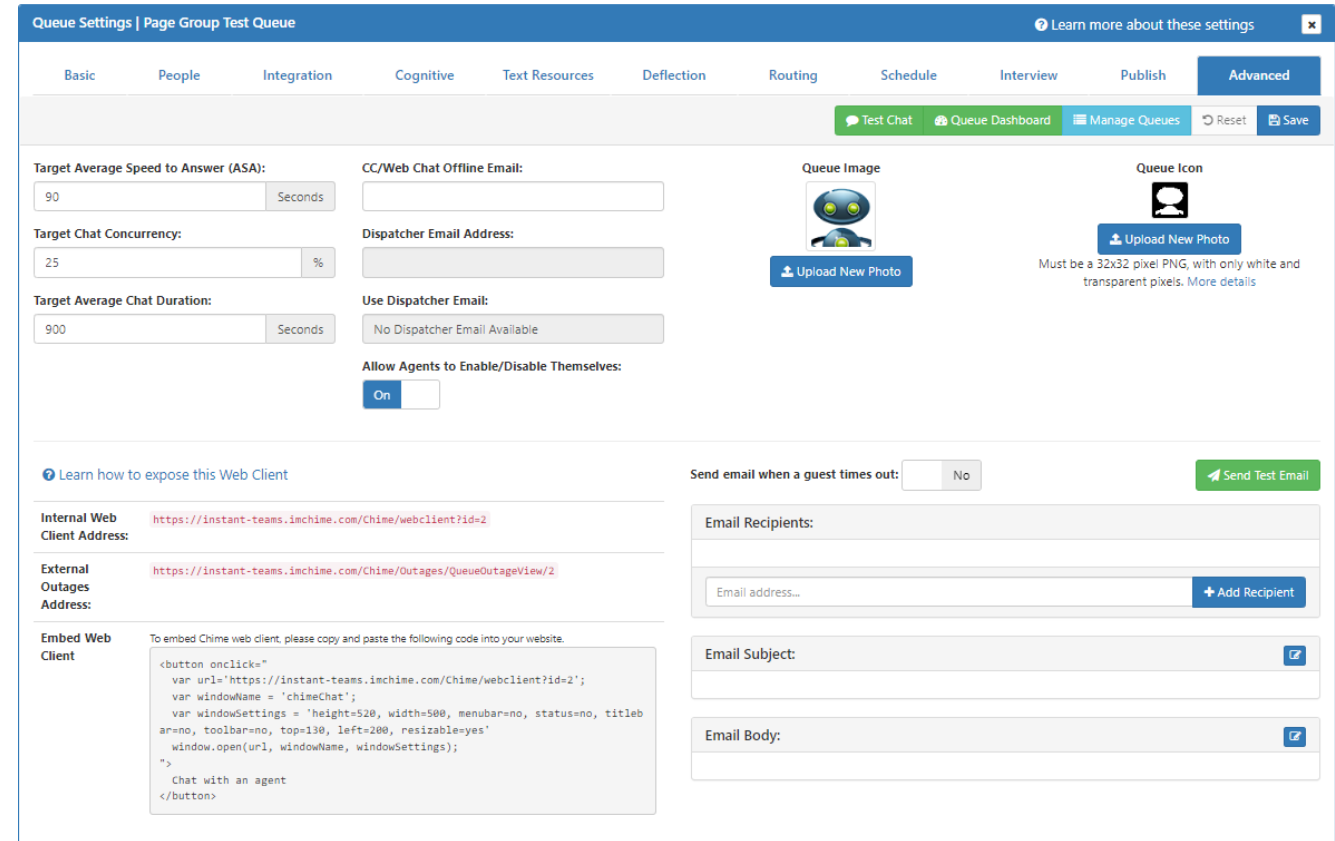
**Agent Connected Virtual Agent**

**Post Conversational Virtual Agent**  
 Resolves All Sessions

[Admin Virtual Agent Settings](#)

Queue Dashboard Manage Queues Reset Save

- What: Advanced settings for a queue that will probably be set once
- Why: Provide options for queue branding, timeout, webchat UI, etc.
- Set queue logo/branding
- Set email for when a guest times out and recipients
- View web client address to help setup dispatcher
- Click to chat embed code to stage on portal
- Set ASA values
- Allow agents to enable/disable themselves in the queue



The screenshot shows the 'Queue Settings | Page Group Test Queue' interface with the 'Advanced' tab selected. The settings are organized into several sections:

- Performance Metrics:**
  - Target Average Speed to Answer (ASA): 90 Seconds
  - Target Chat Concurrency: 25 %
  - Target Average Chat Duration: 900 Seconds
- Communication:**
  - CC/Web Chat Offline Email: [Empty field]
  - Dispatcher Email Address: [Empty field]
  - Use Dispatcher Email: No Dispatcher Email Available
  - Allow Agents to Enable/Disable Themselves:  On
- Branding:**
  - Queue Image: [Image of a robot icon] with an 'Upload New Photo' button.
  - Queue Icon: [Image of a person icon] with an 'Upload New Photo' button. A note states: 'Must be a 32x32 pixel PNG, with only white and transparent pixels. More details'.
- Client Information:**
  - Internal Web Client Address: <https://instant-teams.inchime.com/Chime/webclient?id=2>
  - External Outages Address: <https://instant-teams.inchime.com/Chime/Outages/QueueOutageView/2>
  - Embed Web Client: A code block containing JavaScript code for embedding the chat widget.
- Notifications:**
  - Send email when a guest times out:  No
  - Email Recipients: [Empty list] with an '+ Add Recipient' button.
  - Email Subject: [Empty field] with a copy icon.
  - Email Body: [Empty field] with a copy icon.

- For additional support please contact: [support@instant-tech.com](mailto:support@instant-tech.com)
- For additional information go to our page: <https://addchime.com/teams-manager-training.html>
- For additional information about adaptive cards:
  - <https://adaptivecards.io/>
  - <https://www.madewithcards.io/>