

Live Chat- user guide

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Overview

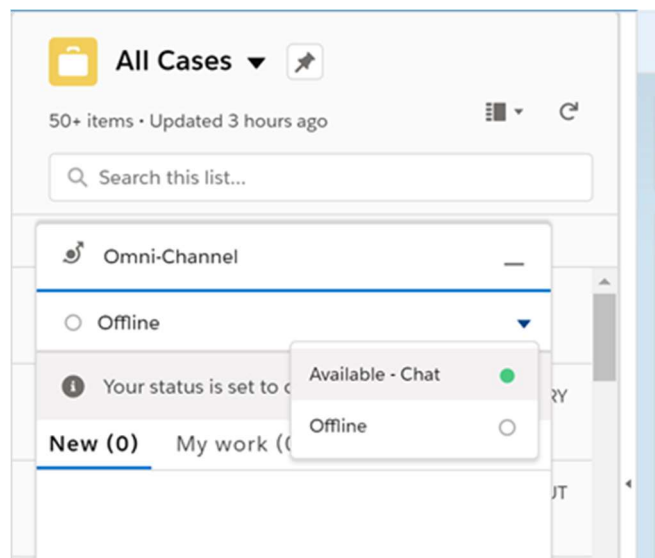
- This guide is intended to support Live Chat Agents and Supervisors whose team use the Salesforce Live Chat.
- You should still undergo training with an existing Supervisor within your team since different teams will have their own way of using the Live Chat function.

Logging on

- To access the Live Chat function, log into [Salesforce](#) and access the Service Desk. You may need to click on the app launcher (9 dots in the top left corner of the page) and then select "Service Desk".
- Click on 'Omni-Channel' in the utility bar at the bottom of the window. By default, this should show Omni-Channel (Offline)

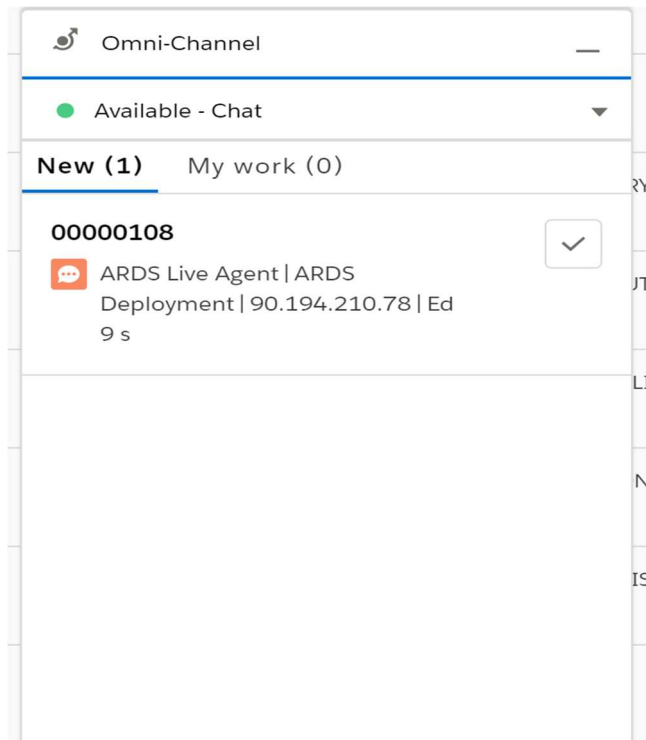


- To make yourself available for chat, click on 'Omni-Channel (Offline)' and in the arrow next to 'Offline', change to "Available - Chat". You are now able to receive calls that come to your team's Live Chat service

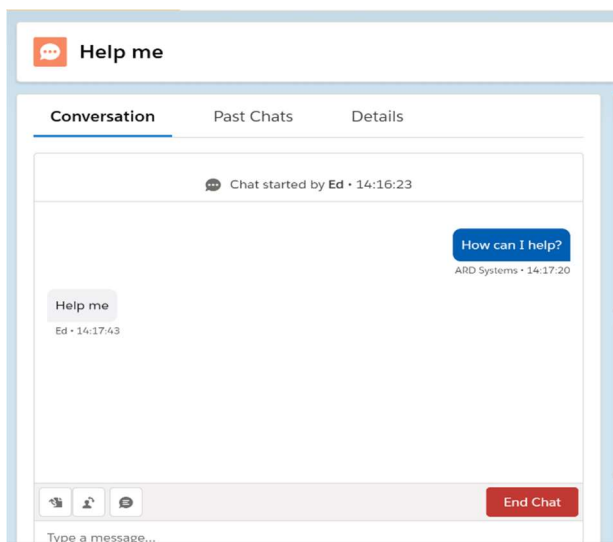


Handling Live Chat calls

- When an enquirer starts a Live Chat and the call comes to you, you will see the following pop-up. You should also hear a distinctive ringtone and the Omni-Channel bar should also start flashing.

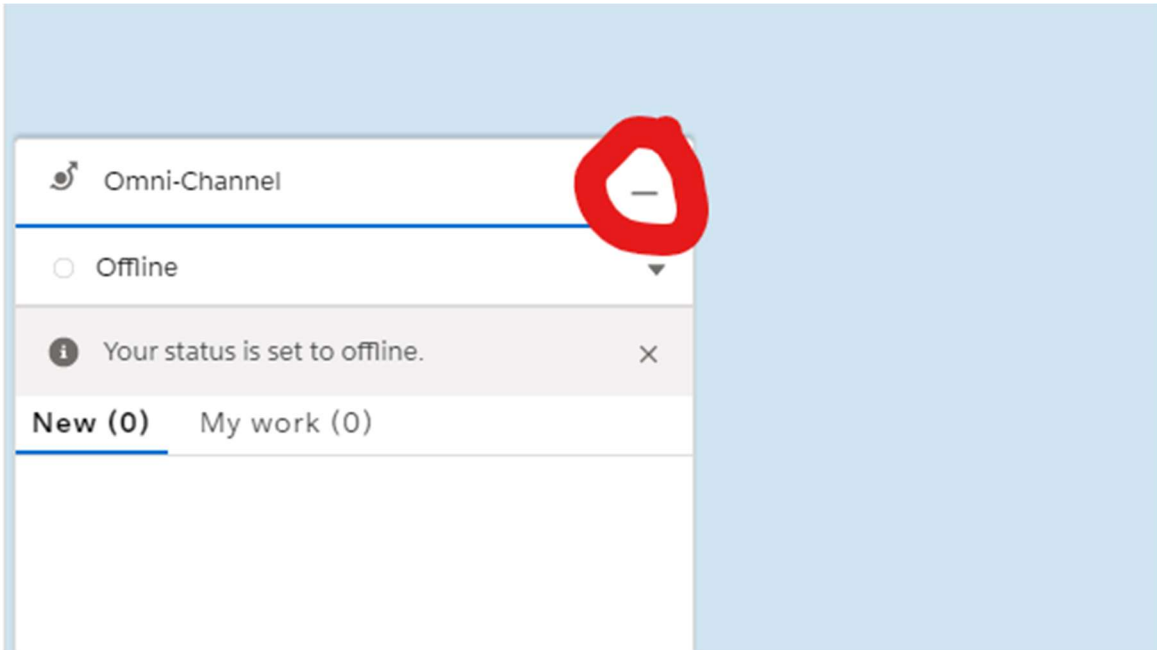


- To accept the chat, click on the tick. You can now initiate a conversation in accordance with your own team's Live Chat processes and style:



Depending on your team's Live Chat settings, you may be able to accept and initiate multiple Live Chat conversations at the same time.

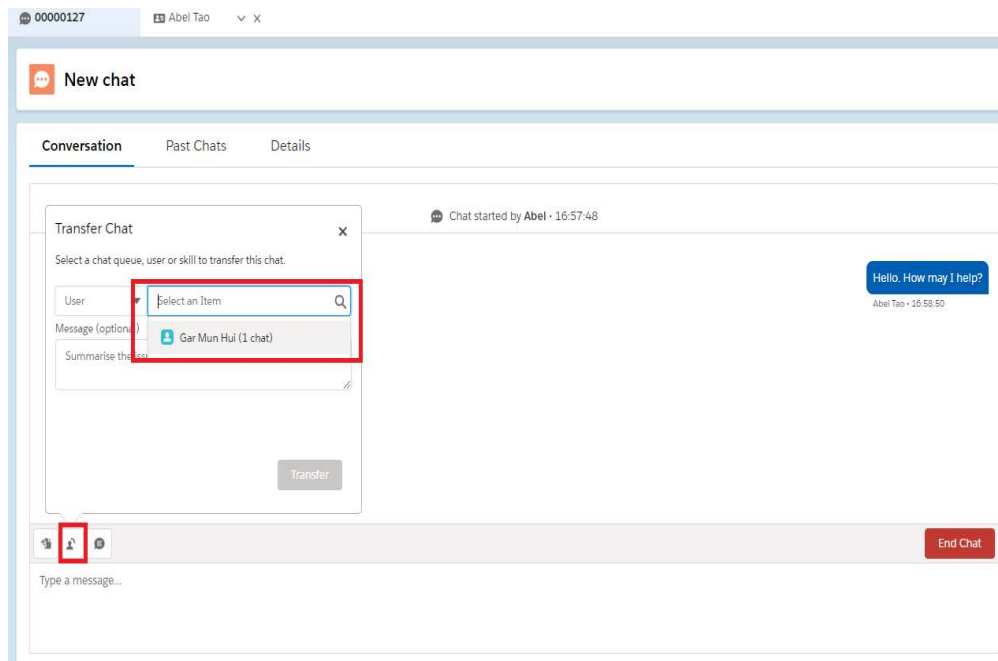
- If the Omni-Channel notification/status window covers the main chat screen, you can resolve this by clicking on the 'Minimise' option:



Live chat functions

Transfer a Call

- Click on the 'transfer' icon just about the box where you type your messages:




- You can select any users who are logged into Live Chat and transfer the call to them. You can leave an explanatory message if you wish to do so. The person receiving the transferred chat will receive an alert in the same way as if an enquirer had initiated the chat with them.

Inserting Quick Text

- If your team uses common phrases / have to deal with a lot of common queries, you may find using Quick Text in your responses an efficient way to deal with enquiries. Your team will need to have set these up in advance.
- To insert Quick Texts in a Live Chat conversation, click on the speech bubble icon above the window in which you type your Live Chat messages.

Request assistance

- If you are unable to successfully deal with an enquiry during a Live Chat session, it is usually a good idea to create a case and respond to the issue later once you've had a chance to investigate. However, if you need to resolve the issue immediately, you may need to ask for live help from a Supervisor. To do this:
 - In the interaction pane, click the  icon.
 - Enter a message briefly explaining what help you need.
 - Click **Raise Flag**.
 - Either you or the Supervisor can lower the flag when your issue is resolved.

Not all teams will use this functionality- check with your Supervisor(s) to see if this is an option that you should use in a Live Chat.

Viewing previous chats

- If you want to access any previous chats that the enquirer may have had with your team, you can click on the 'Past Chats' tab above the conversation window to view these:



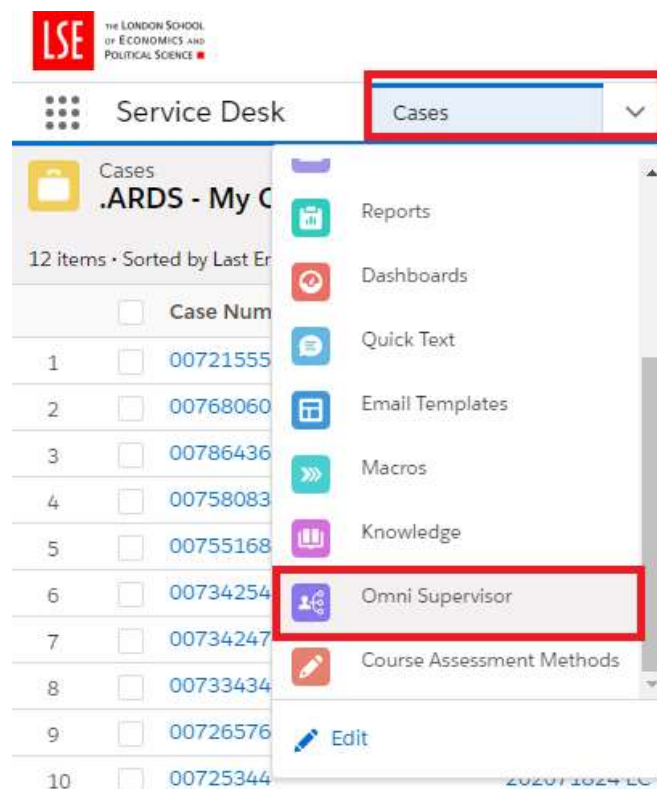
- You can also view any Cases that have been created with your team, by clicking on the 'All Cases' or 'Open Cases' tabs.

Ending a Live Chat call

- Either the enquirer or agent can end a Live Chat call. To end the call as an agent, click on the 'End Call' button in the chat window.
- If requested as part of your team's Live Chat set-up, a Case will be created to your Service Desk.

Supervisor functions

- Live Chat Supervisors have additional access to help support agents in Live Chat calls
- To access these functions, click on the drop-down arrow towards the top-left of the screen and select 'Omni-Supervisor':



- You should then see the Supervisor view of all users who are currently logged into the Live Chat.

Change status

- A Supervisor can change the status of an agent by clicking on 'Change Status' next to the relevant name:

	STATUS ↑↓ ▾	FLAG ▾	ACTION	WORK SUMMARY	STATE ↑↓
KA	Available - Chat since 27-Apr-2021 14:01:35		Change Status		1 h 28 min 55 s
-Darbar	Available - Chat since 27-Apr-2021 14:59:16		Change Status		31 min 15 s
sh	Available - Chat since 27-Apr-2021 13:06:47		Change Status		2 h 23 min 43 s
	Available - Chat since 27-Apr-2021 14:53:19		Change Status	2 Chat Transcripts	37 min 11 s
	Available - Chat since 27-Apr-2021 13:35:58		Change Status		1 h 54 min 32 s

Monitoring

- Click on the arrow next to a user's name and click on 'Monitor'. This allows Supervisors to view transcripts and chat messages between agents and customers.

 Kathryn Ward	Available - Chat since 27-Apr-2021 14:53:19	Change Status	1 Chat Transcript	39 min 4 s	39 min 4 s	5 n
		Monitor	00008301 SMR Live Agent Standard Deployment 115.186.76.120			

Whisper

- This allows Supervisors to send private messages to agents during a chat. The enquirer will not be able to see this correspondence. The 'Whisper' option is available when a Supervisor monitors a call:

Type a whisper...