Agent's Handbook

OVERVIEW

This handbook will allow you, as the agent/operator, to get started handling chats, calls, and tickets using ClickDesk. This will help you from the basics of how it works up to the advanced features that you can take advantage of to work efficiently for your company. Should you have any agent-related issues, you may ask your admin directly (the ClickDesk account holder) for any clarifications. Or you may drop by our website directly so we can help.

Hi there! I'll be dropping by from time to time with awesome tips as you move along through this manual. Click me to drop by our website and our support rockstars will be more than happy to help! Welcome to ClickDesk, enjoy your stay!

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1. Agent Panel

ClickDesk offers a feature-rich Agent Panel where agents/operators can handle chats, voice/video calls, and tickets. If you're new to ClickDesk, it's highly recommended that you use our Agent Panel so you have everything centralized on a single page.

1.1. Know your online presence

The Agent Panel only offers two (2) status - it's either ONLINE or OFFLINE. As the agent, your status is easily toggleable at the top of the agent panel.

1.1.1. How do I login to appear online on our website?

When your admin creates your agent profile, he can then send you the login credentials in a form of an email. This is how the email would look like on your perspective as the agent

1.1.2. How do I logout afterwards?

Logging out is as simple as closing your agent panel browser, or by clicking your status at the top and toggle it from ONLINE to OFFLINE.
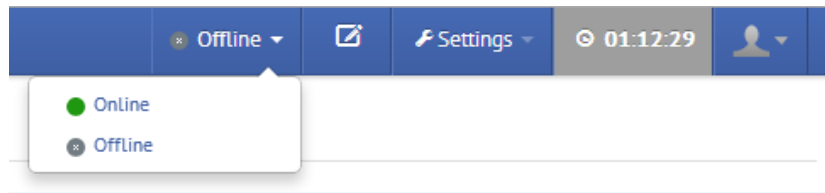
PRO TIP: As the agent, you are solely responsible to your online presence. If you're done with your shift, on a break, or simply away from your workstation, make it a habit of toggling your status to OFFLINE to set proper expectations to your visitors. This also ensures you prevent missed chats and annoyed customers.

1.2. Handling chats

As the agent, you should be well-versed with the tool you're using to handle your chats. You should know the ins and outs of the Agent Panel, the features you can utilize, and take advantage of all the options at your disposal to provide stellar support to your customers.

1.2.1. How do I receive chats?

To start receiving chats, all you have to do is stay online on your Agent Panel. You appear online as long as your status at the top shows a green light with the word ONLINE. You can chat with up to 5 visitors at a time*, but your admin can change this from 1-5 should the need arises and based on the plan he is using.
*Handling 5 concurrent chats exclusively available to paid plans

1.2.2. Can I initiate chats on my own?

Yes you can* - Our map shows your website's real-time visitors so just head over there by clicking the VISITORS menu at the top of your Agent Panel then start picking visitors you would like to talk to.
*Initiate chat feature exclusively available to paid plans

1.2.3. Can I transfer chats to other online agents?

Of course - there are 2 ways of transferring chats to other online agents:
➔ Click the TRANSFER button at the top of the chat conversation then pick the agent to whom you would transfer to
➔ Or use the /transfer $nickname system command (eg. **/transfer John** - where John is the nickname of your fellow agent)

1.2.4. How can I end a chat from my end?

You can end a chat in 2 ways:

➜ Click the blue CLOSE CHAT button at the top

➜ Or use the /bye system command

1.2.5. Can I block a visitor spamming our chat?

On rare occasions when someone is playing around with your chat widget or is spamming you with things unrelated to your website, you have an option to block that visitor. A blocked visitor will be IP blocked and there's no way to unblock them. So ensure that the visitor you're blocking is not a potential client/lead. There are also 2 ways to block a visitor:

➜ Click the red BAN VISITOR button on the right panel where your visitor's info is displayed

➜ Or use the /block system command

1.3. Helpdesk Tickets

Chats are good but you can't be online 24/7, other visitors tend to prefer email correspondence while others prefer to submit tickets. As an agent, you can handle tickets on the Agent Panel without even leaving that page. A good time to handle tickets is when you're waiting for a chat to come in.

1.3.1. Where can I handle my tickets?

To answer tickets, just click the HELPDESK menu on your Agent Panel. Once the Helpdesk page shows up, focus your attention on the left navigation panel first.

- ➜ **Departments** drop down menu - if your admin has setup multiple Departments, then use this drop down to filter the tickets you're viewing
- ➜ **New** - tickets that aren't handled yet and has no owner
- ➜ **Open** - handled tickets that has an owner. These are usually tickets where a reply was already sent to the visitor
- ➜ **Favorites** - tickets tagged as a favorite. Useful for bookmarking or saving tickets that need attention
- ➜ **Closed** - tickets marked as solved
- ➜ **All** - compilation of everything above
- ➜ **Search bar** - useful when searching for tickets using a ticket number or the visitor's email address

1.3.2. Can I transfer a ticket to another agent?

Yes, all you have to do is open the ticket, and on the lower-right hand corner of the page, click the TRANSFER icon, then pick the agent from the popup

1.3.3. How to search for tickets?

Using the search bar on the left navigation panel, you are only limited to use the ticket number or the email address as your search keyword for locating a ticket.

1.3.4. Can I create a ticket on behalf of the customer?

Yes, just click the new ticket icon at the top menu of your Agent Panel. A popup will then show up so just fill in the required fields and make sure you will use your visitor's email address on the requester / customer email address field.
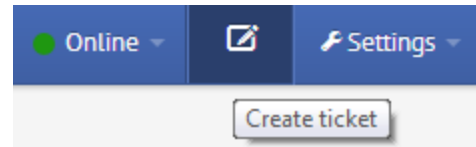
1.4. The awesome Voice/Video call

Yes, you love the Livechat feature, and the ability to handle tickets too. How about we add a bit of Voice/Video Call into the picture, awesome right? This revolutionary feature that is first seen in ClickDesk utilizes a fast browser-based voice/video that works without the need of any plugin or software to be installed. All you need is your browser, an internet connection, a headset and a microphone. It works straight on your browser but here's the catch - since it's a new technology, it only supports

Chrome and the latest version of Firefox. As soon as other browsers catch up, this feature will be cross-browser compatible.

1.4.1. Video chat? Is that for real?

You better believe it*! With this, websites and businesses in the following industries - support, IT services, healthcare, counseling, tutoring, and lots more will benefit to this added feature. There are instances that you will need to see exactly what the customer is seeing for you to assist them better. And with this, well, you couldn't ask for more :)

<mark>*Video chat feature is exclusively available to PRO and ENTERPRISE plans</mark>

1.4.2. How can I video chat with my customer?

Video chat at the moment only offers your visitors to initiate the request from their end. Do note though that a visitor can only initiate a video chat request with you if he/she is already on an active chat session. When the visitor clicks on the Video Chat button on the chat widget, a popup will appear on your Agent Panel.
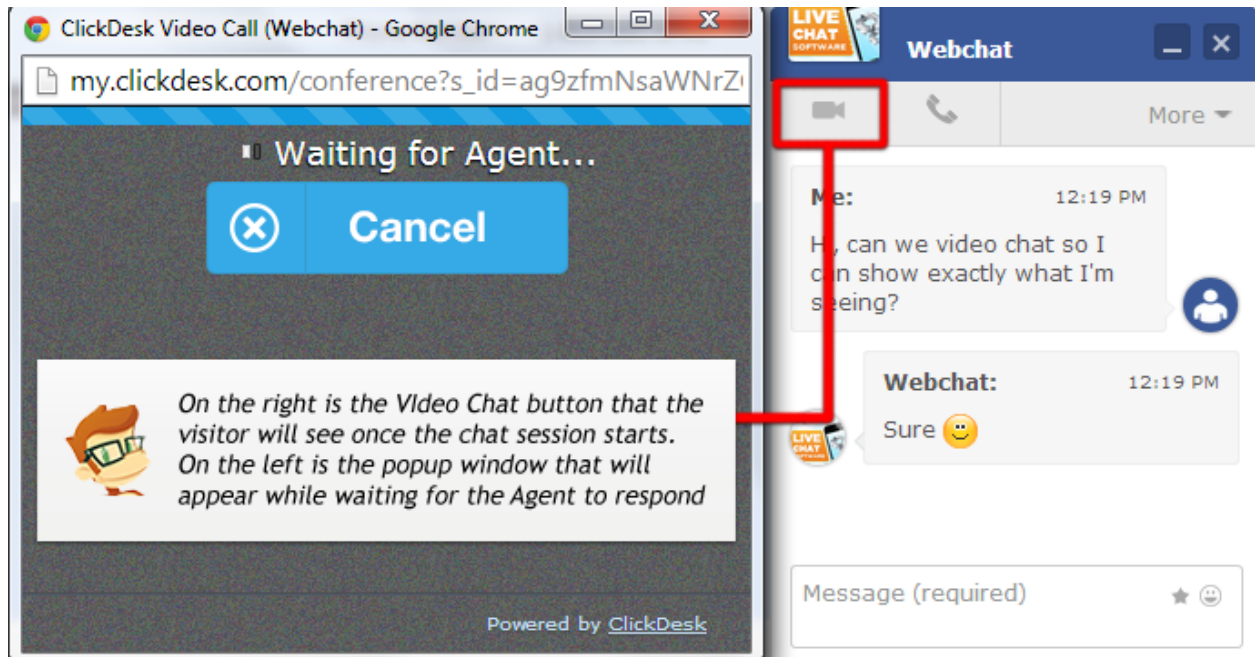
And this is how it would look like on your Agent Panel when someone initiate's a Video Call from your website. After clicking the OK button, another browser window will popup where the video will appear. One last note is to allow our domain to use your camera and microphone via your browser.
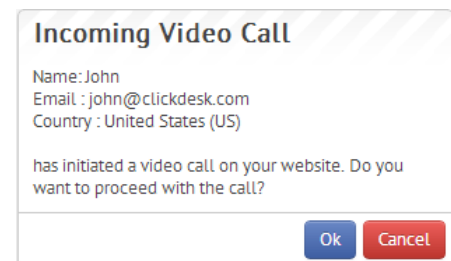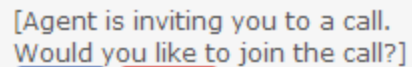
1.4.3. Can visitors call me on my agent panel?

Yes, they can too. The images listed above will be almost identical when it comes to voice calls. The only difference is that the visitors will click the Phone button right beside the Video call button, and the notification you'll receive is for a regular Voice Call.

1.4.4. Can I call visitors proactively?

Yes, same idea applies, you have to be on an active chat session before you can make a call to your visitor. All you have to do is use the /call system command


1.5. Track your visitors

Wouldn't it be nice to see your real-time visitors as they are browsing the website, pick one that looks like a potential lead, strike a conversation, then close the deal? Our Visitor Map will surely come in handy in this situation.

1.5.1. Is that map showing real-time visitors?

Yes indeed* - however, it only shows those visitors who were on the website "the moment" you login to your Agent Panel. It doesn't track your visitors 24/7 since this is not an analytics feature. This is just a nifty addition to your arsenal as an agent on how to better provide support to your visitors.
*Visitors Map is exclusively available to our paid plans

1.5.2. Just a map? How about a listview so I can search using the customer's name/email?

To toggle between the map and list view, just click the tabs at the top of the Visitors page (Map view and List view respectively)
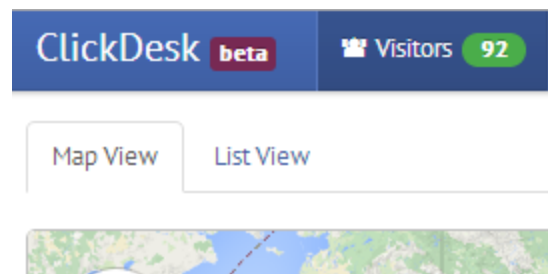
1.5.3. Can I chat with them from the map?

Yes - similar to section 1.2.2. you can initiate a chat straight from the map. Just pick the visitor that you want to chat with, click on his icon on the map and enter your message to begin the chat. The map will contain a couple of icons and corresponding color codes. Here's a list of all the possible colors and what they mean:
- ➔ RED - for regular real-time visitors
- ➔ GREEN - for visitors with an active chat with agents
- ➔ BLUE - for visitors who replied to an initiated chat by an agent

➔ OVERLAPPING ICONS - implies that there are 2 or more visitors on that same location

2. IM Client (Skype)

If you're that type of agent/operator who's always on the go, not always in front of the computer, etc. then Skype might be a better choice for you to handle your chats.
<mark>*Skype is exclusively available to our paid plans</mark>

2.1. Know your online presence

Skype by default has a couple of online presences - you can set it to Online, Away, Do not disturb, Invisible, or Offline. In our perspective though, we only tag you either as Online or Offline. Here's a table showing what your status will be on our system depending on the online presence you choose:

Online Presence	ClickDesk Status
Online	Online
Away	Offline
Do not disturb	Offline
Invisible	Offline
Offline	Offline

2.1.1. How do I login to appear online on our website?

For Skype, here's a quick checklist of what you need to consider to appear properly online on your website:

➔ Your status should be Online and not set as Away, Do not disturb, or Invisible
➔ You should have all the bots present on your contact list (ClickDesk 1 up to 5)
➔ Refrain from logging in to multiple sources (eg. PC/MAC, phone, tablet, etc). To avoid being tagged as away from a different device while staying online on your PC, it would be best to login from a single source alone

2.1.2. How do I logout afterwards?

There are 2 ways to logout and appear offline in
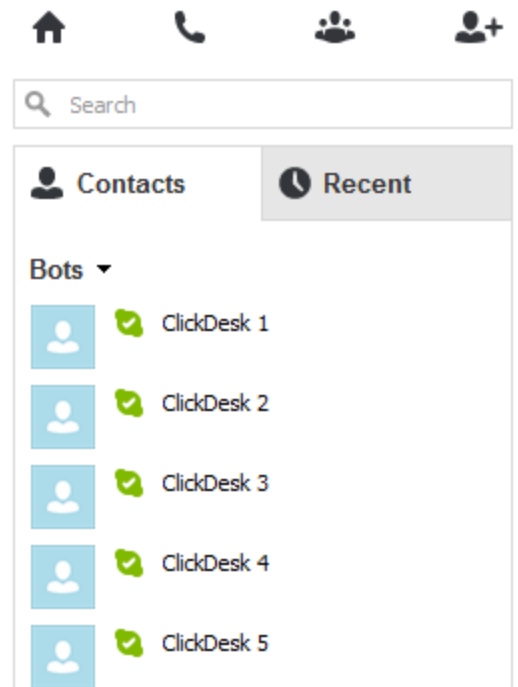
Skype:
- ➔ The traditional way is just by setting your status to Away, Do not disturb, Invisible or simply logout of Skype
- ➔ Or by using the \offline command. To use this command, just type and send \offline to your first bot ClickDesk1

\offline

ClickDesk 1   [Your status is successfully identified by Clickdesk. You are now offline. You no longer receive any chats from your web visitors. To start receiving chats again, send /online.]

- ➔ NOTE: Applicable to 2.1.1 - if you used the \offline command, then the step to go online would be to use the \online command

2.2. Handling chats

The idea behind accepting 5 contact bots on your Skype account is for you to handle chats with up to 5 visitors at a time (max concurrent chats on paid plans). You basically receive chats on those corresponding bots as if you're just chatting with a friend on your Skype contact list. With that in mind, the bots only serve the purpose of pushing chats to your Skype account, nothing more than that. So you can't have your visitor's name show on your Skype, your visitor info will only appear on the actual chat itself.

2.2.1. How do I receive chats?

Simple enough - just stay online and logged in to Skype and you'll get to receive chats from your website. All these will come to the bots on your contact list - thus explaining why you have a total of 5.

2.2.2. Can I initiate chats on my own?

Unlike the Agent Panel, with Skype, you can't initiate a chat on your own

2.2.3. Can I transfer chats to other online agents?

Yes, just use the \transfer $nickname command (eg. \transfer John)

2.2.4. How can I end a chat from my end?

Just use the \bye command then type and send it into the conversation

2.2.5. Can I block a visitor spamming our chat?

Yes, and by now you might have noticed a trend, yes the prefix for Skype commands is not / but \ So to block a visitor, just type and send \block into the conversation (gentle reminder on how blocking works on 1.2.5.

2.3. Voice Calls

Often times, agents confuse themselves that in order for them to receive calls on Skype, the visitor has to be on Skype too. No, they don't - your visitors can call you directly using our chat widget and that call will be routed to another contact on your Skype contact list - invoxwidget.

2.3.1. Can visitors call me on Skype?

Yes they can - however, there are certain things to consider first for this to work. And this all depends on how your agent profile was setup and how your admin has setup the livechat theme. As the agent however, all you need to know for now is that you can receive calls on your Skype if you have the "invoxwidget" contact added on your contact list. If all you see are the 5 contact bots, manually add invoxwidget so you can start receiving calls.

2.3.2. Can I call visitors proactively?

Yes, referencing section 1.4.4., you can call them proactively by using the \call command

3. IM Client (GTalk)

GTalk is an XMPP-based IM client from Google that was recently replaced by Hangouts. However, Hangouts have dropped the XMPP protocol used by most 3rd party apps (including us). Thus, we would advise agents not to use Hangouts and stick to using the old GTalk IM client. Since GTalk can virtually be integrated with lots of XMPP-based IM clients, here are some IM apps that you can use for both your PC and mobile phones:

For PC
  - ➜ GTalk IM client for PC
  - ➜ Built-in chat within GMail
  - ➜ Trillian, Pidgin, Psi, Adium, iChat, Miranda, Kopete and tons of others

For Mobile
  - ➜ Android: Talk app native on ICS (to older) phones before the Hangouts update
  - ➜ Android: Any 3rd party IM app on the playstore that supports GTalk like Trillian, IMO.im, Pidgin, vTok, etc.
  - ➜ iOS: Only 3rd party apps and no native GTalk app

For more info, refer to our blogpost about this update from Google
http://blog.clickdesk.com/do-not-hangout-yet/

3.1. Know your online presence

Similar to Skype, GTalk too has a couple of online presence available. However, since GTalk is flexible and can be integrated with tons of 3rd party IM apps, the online presences might differ based on the IM Client you're using. But the general idea still applies as below:

| Online Presence	ClickDesk Status
Online	Online
Away/Busy	Offline
Invisible	Offline
Offline	Offline

3.1.1. How do I login to appear online on our website?

Just open your GTalk IM client and ensure you have all the contact bots listed on your contact list (livechat1 up to livechat5). Similar with Skype, you need to set your status as Online and not as Busy, Invisible, etc.

3.1.2. How do I logout afterwards?

There are 2 ways to logout and appear offline on your website:

➔ The traditional way is to logout of GTalk/Gmail chat
➔ Or by using the /offline command. To use this command, just type and send /offline to your first bot livechat1
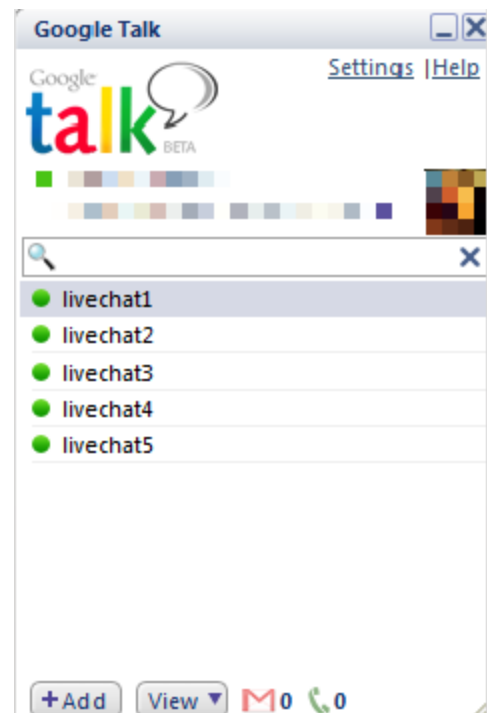
3.2. Handling Chats

Same with Skype, you handle your chats in GTalk via the contact bots that you added. Remember not to remove those contact bots for our system to detect your status.

3.2.1. How do I receive chats?

To receive chats, just stay logged in to GTalk and the chats will go through your bots

3.2.2. Can I initiate chats on my own?

Unlike the Agent Panel, with GTalk, you can't initiate a chat on your own

3.2.3. Can I transfer chats to other online agents?
Yes, just use the /transfer $nickname command (eg. /transfer John)

3.2.4. How can I end a chat from my end?
Just use the /bye command then type and send it into the conversation

3.2.5. Can I block a visitor spamming our chat?
Yes, to block a visitor, just type and send /block into the conversation (gentle reminder on how blocking works on 1.2.5.

3.3. Voice Calls
Just like Skype, you need to add another contact to your GTalk's contact list where the calls will come in - invoxwidget@gmail.com However, there are a couple of things to know when it comes to handling voice calls on GTalk. To have a better view, the table below will show what works and what doesn't:

IM Client	Can receive Voice Calls?
PC: GTalk IM Client	YES
PC: Built-in chat within GMail	NO
PC: 3rd party IM clients	NO
MAC: Built-in chat within GMail	NO
MAC: 3rd party IM clients	NO
Android: Stock Talk app	NO
Android: 3rd party IM apps	NO
iOS, others: 3rd party IM apps	NO

You can see that only the actual GTalk IM Client for PCs work, and all others don't. Sadly this is beyond our control since Google has designed it that way. If you really need to receive calls, we recommend you use GTalk directly instead. Here's a download link straight from Google

3.3.1. Can visitors call me on GTalk?
Yes they can, summing up sections 2.3 and 2.3.1. - you can only receive calls on the actual GTalk IM client and you should have the invoxwidget@gmail.com contact bot added on your contact list.

3.3.2. Can I call visitors proactively?
Yes, referencing section 1.4.4., you can call them proactively by using the /call command

B. SHORTCUTS AND SYSTEM COMMANDS

1. Shortcuts

Shortcuts make an agent's life easier - you may issue a shortcut into a chat conversation and an entire message will be sent to your visitor in an instant

1.1. Are these similar to canned responses?

Yes, exactly as it sounds, when a shortcut has been used, a canned response will be sent to the visitor. The number of shortcuts that you can use is limited on the plan chosen by your admin.

1.2. Can I create my own shortcuts?

As an agent, no, you can't - but your admin can do that for you and he can then set it up on his ClickDesk account so you may start using them. Shortcuts are always prefixed with a forward-slash when creatd (eg. /hi, /pitch, /sorry). One minor note when using Shortcuts is that you can't edit the message before sending. The message will auto-send to the visitor as soon as you send the Shortcut command.

2. System Commands

Agents use Shortcuts to make their life easier - and to aid you with that, we also came up with system commands that agents can use. Some of them were already mentioned on this handbook, but here, we'll list all of the available system commands and their corresponding function:

Command	Function	Command	Function
/history	Show previous chats for the visitor	/name	Shows you the visitor's name
/bye	Ends the chat	/email	Shows visitor's email
/transfer $nickname	Transfer to another online agent	/email $email	Set the visitor's email
/info	Will show you the visitor info	/cancel	Cancel the email automatically set
/help	List all available commands	/join $nickname	Invite an online agent to a conference
/block	Blocks a visitor	/leave	Leave a conference
		/leave $nickname	Kick the agent from a conference
		/leave all	End the conference
		/private	Send a private chat to another agent

2.1. What commands will I use on a regular basis?

On your daily chats, you won't use all the commands listed above, the most common commands that you will use will be - /bye /transfer and probably /block. Going back to our Agent Panel, the good thing about using it is that instead of memorizing all

these commands, our Agent Panel showcases user-friendly UI that corresponds to these commonly used commands:

➔ /bye - click the "Close Chat" button
➔ /transfer - click the "Transfer" button
➔ /block - click the "Ban Visitor" button
➔ All custom shortcuts created by your admin are also shown on your Agent Panel on the "Shortcuts" button

2.2. Can I change the system commands?

No, you can't change or modify any of the existing system commands

C. LET'S COMPARE - AGENT PANEL VS IM CLIENTS

Since an agent has three (3) options to choose from on which tool to use to handle chats, here's a nifty comparison table so you can gauge what works best for you.

1. Comparison Table

Feature	Agent Panel	Skype	GTalk
Chats	YES	YES	YES
Tickets	YES	NO	NO
Voice Calls	YES	YES	YES
Video Calls	YES	NO	NO
Visitor Map	YES	NO	NO
Agent-initiated chats	YES	NO	NO
Agent-initiated calls	YES	YES	YES
List of Shortcuts*	YES	NO	NO
List of online agents**	YES	NO	NO
Detailed visitor info***	YES	NO	NO

* Shortcuts are displayed when you click the Shortcuts button
** All online agents are displayed when clicking the "Transfer" button
*** More info are shown like the visitor's IP and a map showing his geolocation

2. Scenarios

➔ Agent Panel - use it when you're always in front of your workstation during your entire shift. This would be the best setup you can have as an agent

- ➜ Skype - if you're on the go most of the time, would like to receive both chats and calls at the same time, and if you're mostly an Apple product guy then use this
- ➜ GTalk - if you're on the go, would like to receive chats alone, and on the Android platform, then this would be your best bet

3. Verdict

Our thoughts? Use the Agent Panel, it's feature-rich, fast and browser-based so you won't need anything to install. But still the flexible options we offer will cater most situations based on your requirement as the agent, so mix and match the tools at your disposal depending on your needs.