Advanced Chat Features

Versions 6.6 - 6.8

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8x8 Proprietary

Preface

This document supplements the Contactual *Configuration Manager Guide* with information about configuring advanced chat features.

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Overview of Advanced Chat Features

This document describes how to use the following advanced chat features:

- Creating Chat Surveys

- Sending Images in a Chat Session

- Displaying Chat Referrer Information

Creating Chat Surveys

When a customer begins a chat interaction, a *chat survey* asks the customer for information before placing the new chat interaction in an OnDemand Contact Center queue.

The chat survey then presents this information to the agent when the agent accepts the chat interaction.

Chat Survey Technical Requirements

To implement a chat survey, you create an HTML survey form, deploy the survey form to a publicly accessible Web site, then use the Configuration Manager to specify the location of the chat form.

The procedures in this section assume that you:

- Have a publicly accessible Web site that can be used to host the chat survey.
- Have the technical knowledge required to create the chat survey's HTML form.
- Have the technical knowledge and permissions required to deploy the chat form and create the URL necessary to access that form.

Creating and Naming the Chat Survey Form

Operation of the chat survey feature requires you to:

- Create a properly formed HTML chat survey file
- Name the HTML chat survey file identically to the Contactual Support Center that uses the file

Creating a Chat Survey Form

A Chat Survey form consists of an HTML form.

Example 1 illustrates the HTML for a simple chat survey form.

Example 1: HTML for a chat survey form

```
<!DOCTYPE html PUBLIC "-//W3C//DTD HTML 4.01 Transitional//EN">
<html>
  <head>
<title></title>
</head>
<body>
<table>
<tr>
<td><label for="first_name">First Name:</label> </td>
<td><input name="first_name" value="" id="first_name" type=
"text"> </td>
</tr>
<tr>
<td><label for="last_name">Last Name:</label> </td>
<td><input name="last_name" value="" id="last_name" type="text">
</td>
</tr>
<tr>
<td><label for="gender">Gender:</label> </td>
<td><select name="gender" id="gender">
<option value="male">male</option>
<option value="female">female</option>
</select> </td>
</tr>
</table>
</body>
</html>
```

Figure 1 illustrates the form's appearance in a browser window

Figure 1: Chat survey form produced by HTML in Example 1

Naming the Chat Survey HTML File

The file containing the HTML survey form must correspond to the Contactual Support Center that uses the file, except that you must replace any space characters in the Support Center name with underscore characters (_) in the file name.

For example:

- If your Contactual Support Center's name equals `My Own SC,`

  then

- You must name the file containing the chat `My_Own_SC.html.`

Deploying the Chat Survey Form

After creating and naming the HTML file containing the chat survey form, deploy the form to a publicly accessible Web server.

You can choose to create a subdirectory on your Web server for chat files; for example a subdirectory named `chat.`

For example:

- If the server's base URL equals `http://www.acme.com,`

  then

- The directory containing the HTML chat survey file equals `http://www.acme.com/chat.`

Acquiring the URL of Your Survey-enabled Chat Channel

Perform the procedure in this section to acquire the URL of a survey-enabled chat channel.

You can then use the URL to enable customers to initiate a chat interaction from your company's support Web page.

To perform the following procedure, you will need the URL of your chat survey form.

To specify the URL of the Chat Survey form:

1. Display the *Support Center* page, *Properties* tab.

   In the Contactual Configuration Manager, in the Configuration menu, click **Support Center** to display a list of support centers, in the list of support centers choose a Support Center, then click **Edit**.

   By default, the Configuration Manager displays the *Properties* tab.

Figure 2: Support Center page, Properties tab

2. In the **Properties** tab, in the in the **Support Center Private Labeling** area, select **Enable chat survey**.

3. In the **URL for Private Labeling** area, paste the URL of the chat survey HTML file.

   For information about the URL of the chat survey file, see *Naming the Chat Survey HTML File*, on page 3.

4. Click **Save**.

   The Configuration Manager saves your changes.

Acquiring the URL of Your Chat-enabled Channel or Queue

If you want to enable your customers to initiate a chat interaction from a Web presence other than a Contactual Support Center page, then in the Configuration Manager, use the *Support Center* page, *Direct URL* tab, to copy the URL of the OnDemand Contact Center chat channel or queue to your company's support Web pages.

Acquiring the Direct URL of a Chat Channel or Queue

To add the URL of a survey-enabled chat channel to your Web site, copy the URL from the Configuration Manager, *Support Center* page, *Direct URL* tab.

To acquire the URL of a survey-enabled chat channel or queue:

1. Display the *Support Center* page, *Direct URL* tab.

   In the Contactual Configuration Manager, in the Configuration menu, click **Support Center** to display a list of support centers, in the list of support centers choose a Support Center, click **Edit**, then click the **Direct URL** tab.

   The Configuration Manager displays the *Direct URL* tab.

2. To acquire the direct URL of a survey-enabled chat channel:

   a. In the **Direct URL** tab, scroll down to the **Direct access to the Chat Channels Menu of the Support Center** area

   b. In the **Direct access to the Chat Channels Menu of the Support Center** area, copy the URL of the survey-enabled chat channel.

   Figure 3: Support Center page, Direct URL tab, Direct access to the Chat Channels… area

   If the OnDemand Contact Center supports more than one Support Center, be sure to copy the URL of the correct support center channel.

3. To acquire the direct URL of a survey-enabled chat queue:

   a. In the **Direct URL** tab, scroll down to the **Direct access to the Chat Queues Menu of the Support Center** area

   b. In the **Direct access to the Chat Queues Menu of the Support Center** area, copy the URL of the survey-enabled chat channel.

If the OnDemand Contact Center supports more than one Support Center, be sure to copy the URL of the correct support center queue.

4. Paste the URL of the survey-enabled chat channel into your support Web site.

    The Configuration Manager saves your changes.

You can now paste the same URL in a Web browser and validate the operation of the chat survey.

Sending Images in a Chat Session

Agent Supervisors can include the URL of a picture or diagram in an Agent Console FAQ Answer. For information about creating FAQ Answers, in the *Agent Supervisor Desktop Guide*, see *Creating a FAQ Answer*.

Agents can then use the Agent Console *Insert FAQ* feature to insert those image-bearing FAQ answers into chat interactions.

Image files referenced by a FAQ answer must be hosted on a publicly accessible Web site.

Deploying Chat Image Files to a Web Server

You must deploy the Web-safe image files referenced by FAQ Answers to a publicly accessible Web server.

You can choose to create a subdirectory on your Web server for chat files; for example a subdirectory named `images`.

For example:

- If the server's base URL equals `http://www.acme.com,`

   then

- The directory that contains the image files referenced by a FAQ Answer equals `http://www.acme.com/images.`

In most cases, use the Web-safe image formats GIF, PNG, and JPG. BMP images files are also supported.

Referencing Images by URL in FAQ Answers

After placing image files on a publicly accessible Web server, perform the procedure in this section to add a reference to a FAQ answer.

The procedure in this section assumes that:

- You are familiar with using an Agent Supervisor Console account to create FAQ categories and FAQ answers.

For information about creating FAQ categories and answers, see the *Agent Supervisor Desktop Guide*.

▪ You have placed the image file you want to reference in a FAQ answer on a publicly accessible Web server.

For information about placing images on a publicly accessible server, see *Deploying Chat Image Files to a Web Server*, on page 8.

To reference an image file by URL in a FAQ answer:

1. Log in to an Agent Supervisor Console account.

   You must be an Agent Supervisor to create and edit FAQ categories and answers.

2. In the Frequently Asked Questions window, create or edit a FAQ Answer

   The Agent Supervisor Console displays the Edit FAQ window.

Figure 4: Agent Supervisor Console, Edit FAQ window.
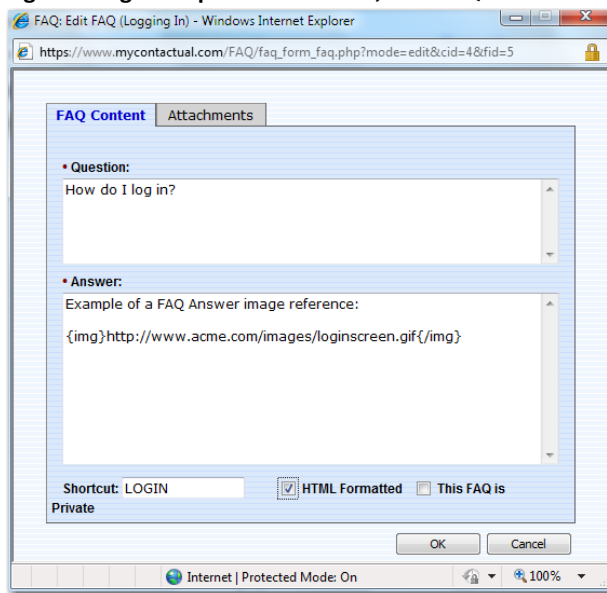
3. Incorporate the URL of the image into the FAQ answer. In the **Edit FAQ** window:

   ▪ Select **HTML Formatted**.

   ▪ In the **Answer** text entry area, insert the URL of the image file between `{img}` and `{/img}` tags.

   For example:

- If the image URL equals
  `http://www.acme.com/images/ImageFile.png,`

  then

- The reference to the image in the Answer text entry area equals
  `{img}http://www.acme.com/images/ImageFile.png{/img}.`

4. Click **OK**.

   The Agent Supervisor Console saves the FAQ answer.

In the Agent Console, in the Tools panel, an agent can now click *Insert FAQ* to embed that FAQ answer and image into a chat interaction.

When an agent embeds an image in a chat, the customer sees the full-sized image; in the Agent Console, *Chat Transcript* area, the Agent Console sees a smaller rendering of the image.

Displaying Chat Referrer Information

By default, during a chat interaction the Agent Console displays the URL of the page used to originate the chat interaction.

Figure 5 illustrates the Agent Console, Tools panel, displaying the *Referrer* URL during a chat interaction.

Figure 5: Chat interaction, *Referrer* information
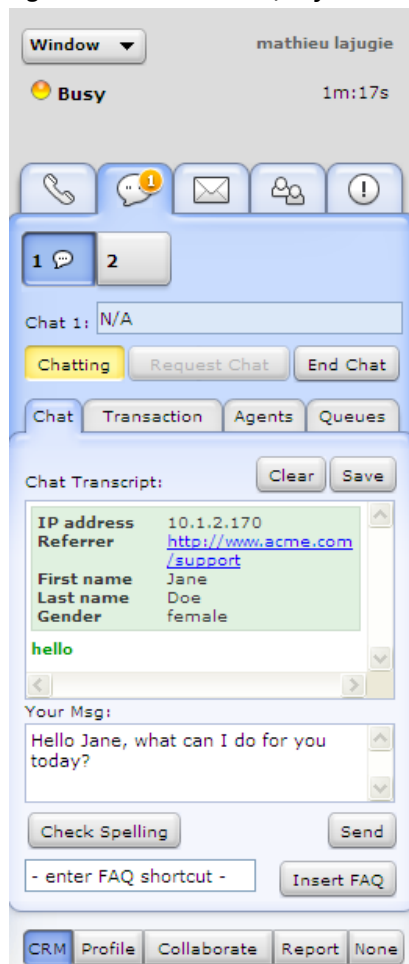
You can also incorporate supplementary referrer information in the URL a customer uses to initiate a chat interaction.

Adding Referrer Information to a Chat URL

You can add supplementary referrer information to the direct URL used to initiate a chat session.

Example 2 illustrates a default form of a direct URL to an OnDemand Contact Center chat channel.

Example 2: Default direct chat URL

```
http://www.mycontactual.com/AGUI/agui_directaccess.php?tenant=ptest2&sc_name=My+-
Default+Support+Center&back=http://www.yahoo.com&cmd=sc_chat_main
```

Example 3 illustrates the same direct URL to a chat channel with the supplementary referrer information `&referrer=http%3A%2F%2Fwww.acme.com%2Fproduct1` appended to the URL.

Example 3: Direct chat URL with supplementary referrer information

```
http://www.mycontactual.com/AGUI/agui_directaccess.php?tenant=ptest2&sc_name=My+-
Default+Support+Center&back=http://www.yahoo.com&cmd=sc_chat_
main&referrer=http%3A%2F%2Fwww.acme.com%2Fproduct1
```

Encoding Special Characters in URLs

In Example 3, certain characters that have special meanings in URLs are specially encoded as two hexadecimal characters preceded by the percent character (%).

Table 1 summarizes some of the characters that must be specially encoded in URLs, and lists those character's special encoding in hexadecimal.

Table 1: Common characters that must be specially encoded in URLs

Name	Character	Encoding (hexadecimal)
Ampersand	&	%26
"At" symbol	@	%40
Colon	:	%3A
Comma	,	%2C
Dollar	$	%24
Equals	=	%3D

Name	Character	Encoding (hexadecimal)
Plus	+	%2B
Question mark	?	%3F
Semicolon	;	%3B
Slash mark	/	%2F

For more information about special character encoding in URLs, see the following World Wide Web Consortium (W3C) Web site page:

http://www.w3.org/Addressing/URL/4_URI_Recommentations.html.