Admin User Guide

DigiDesk URL: **https://digidesk.citrustelecom.net/app2** (Optimised for Google Chrome)

Configuration

Digital Accounts

Name	Account Name within DigiDesk platform.
Routing Decision	Set Routing decision.
Routing Style	Choose from Longest Idle | Cyclical | Dynamic .
Activity Cap	Define max number of mentions before reahing activity cap.
Cap Exceeded	Choose from Unassigned | Team | Agent
Time Elapsed	Define time elapsed threshold.
Time Exceeded	Choose an Action, triggered when time elapsed threshold is reached.
Email Alert	Triggers email alert to nominated / specified email address(es)

There may be other channel-specific settings. If you need further support, contact your account manager.

Teams

Set Up Teams	Assign your Agents to Teams, with associated settings.

Agents

Username	Define Username, used to login to DigiDesk.
Password	Define / update Password for each user.
Name	Define the Agents Name, used for the [agent name] variable.
Image	Upload image for Agent.
Team	Select Team(s) for Agent.
Profile	Select Profile for Agent.
Channel Settings	Define user skill level, per account, with other associated settings.
Schedule	Define Agent Schedule, with associated settings.

Advanced Settings

Resolutions	Manage and add Custom Resolutions, for engagement.
Responses	Manage and add Auto Responses, for engagement.
Workflow	Configure advanced workflow, based on conditions with associated actions.
Custom Widgets	Configure a range of Custom Widgets, with associated settings.

For further support on advanced settings, contact your account manager.

Engagement Guide

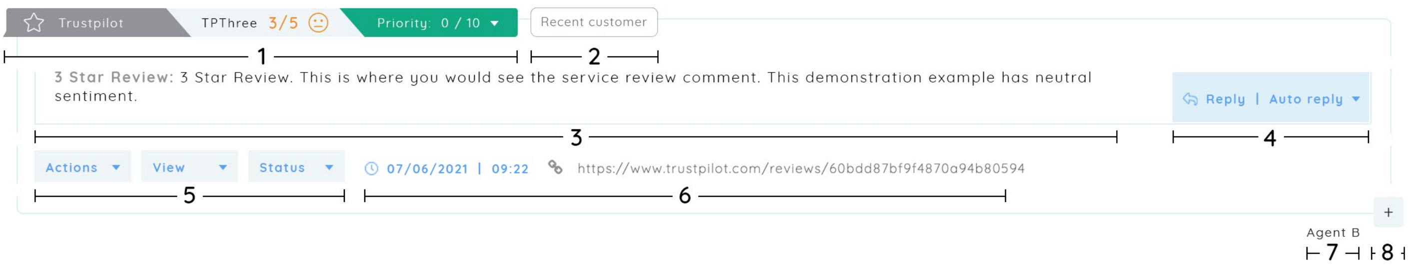
DigiDesk URL: **https://digidesk.citrustelecom.net/app2** | Username: **Your email** | Password: **Firstname123#**

Overview

Interactive Icons

1. Navigation Menu	Access different areas of the DigiDesk platform, restricted by user Permissions.
2. Bookmarks	Allows users to create or access previously saved Personal and Global Bookmarks.
3. Filters	Personalise your view using a wide range of Filters, then save Filtered views for instant access at a later date, via Bookmarks.
4. Help	Click to access a dynamic, pop-up, user guide for high-level assistance.
5. Agent Info	Displays Agent Name and Extension (voice only).
6. Status Bar	Displays Time-In-Current-Status and a Status Menu dropdown, used to select from a pre-defined list of available Statuses, like; Ready, Paused, Meeting and Lunch.
7. Log Out	Click to Log Out of your current session.

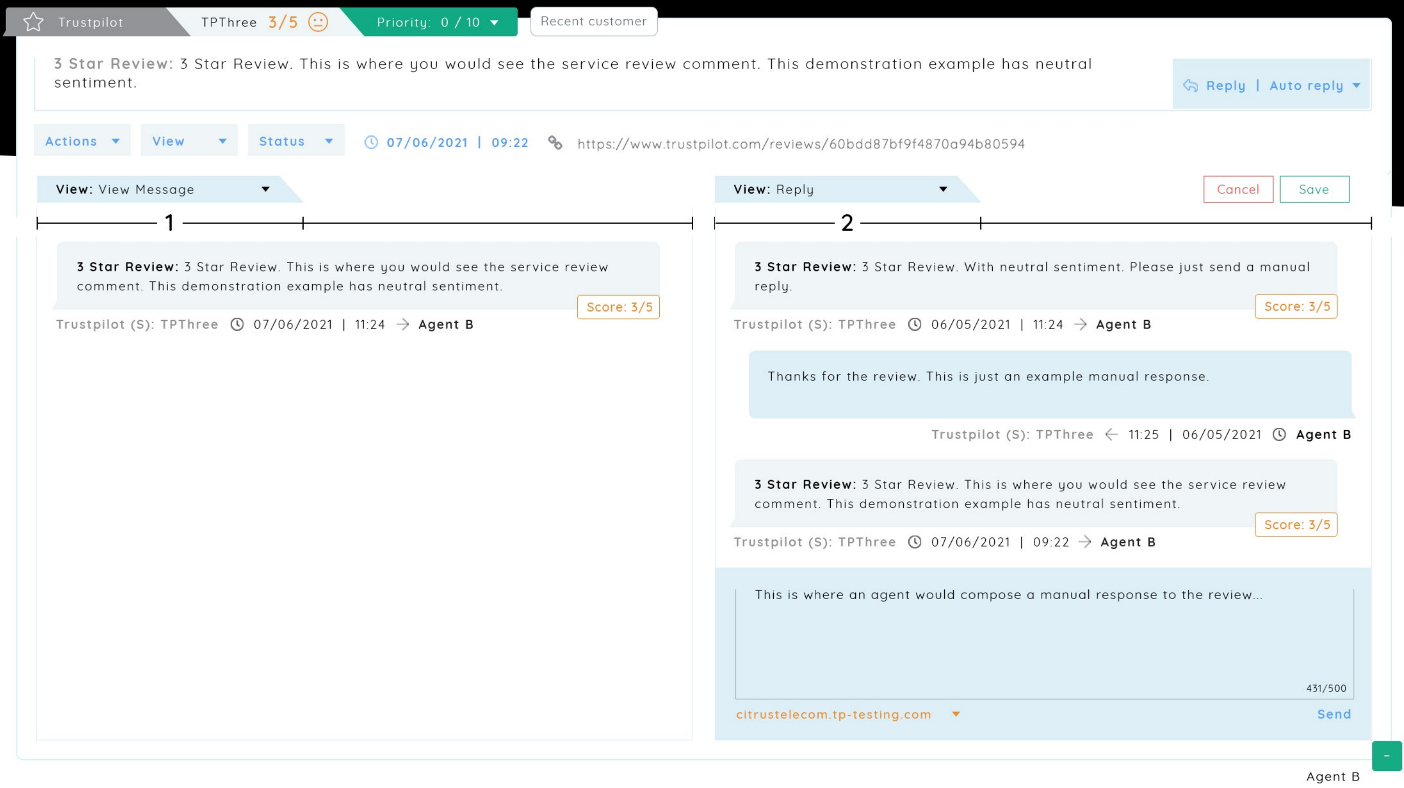
Mention Presentation



1. Mention Bar	Displays the Account Name, Customer Name (or CLI), Sentiment and Priority.
2. Tags	Displays Tags associated with the mention.
3. Mention Summary	A mention summary, diplaying up to 200 characters of the customers mention text.
4. Quick Reply	For Digital mentions, Reply and Auto Reply options.
5. Mention Options	A range of powerful engagement options. A detailed explanation of each is provided in the 'Mention Presentation Maximised' section of this guide.
6. Time/Date Stamp	Displays the time and date each mention was received.
▸ Native Link	Presents the native Trustpilot link.
7. Agent Assigned	Shows the Agent currently assigned to the Mention.
8. Maximise	Launches the Maximised mention view with additional engagement options.

Engagement Overview continued...

Maximised View



1. View Window A	View Windows display interchageable engagement views (listed in detail, below). The contents of the Window is selectable via the highlighted dropdown menu.
2. View Window B	Displays a supporting interchangeable Engagement view.
Actions	
‣ Assign	Reassign the mention to another agent.
‣ Tag	Choose from multiple tags and save to record.
‣ Mark As	Potential to 'mark' the customer as a specific customer type.
‣ Send To	Send a copy of the mention, via email, to a recipient.
‣ Auto Replies	Choose from a range of canned responses. Applicable to digital channels.
‣ Auto Notes	Choose from a list of pre-defined notes and save to record.
‣ Forward (email only)	Forward the email, to an email recipient.
‣ Other	There may be other Actions available, depending on channel.
Views	
‣ View Message	Review current Mention and any associated attachments.
‣ Reply	Enables Agent to reply via corresponding (or alternate) channel.
‣ Conversation History	Shows all previous interactions between Agent(s) and Customer.
‣ Customer Record	View and update Customer Record fields.
‣ Notes	View and add Notes attributed to the customer.
‣ Other	There may be other Channel / Account specific views

Engagement Overview continued...

Maximised View (continued)

Status	
No Action	Close Mention and remove from Queue with a ‘No Action’ Status applied.
Resolved	Close Mention and remove from Queue with a ‘Resolved’ Status applied.
Open	Keep the Mention Open, and visible within your Mention Queue.
Other	There may be other custom statuses. If so, please speak with your supervisor.

Agent Summary

Agent Summary	Today
Total Contacts	2
Complete	2
Incomplete	0
Missed	0
Average TTA	00m23
Average Duration	01m06
Average TTR	01m29

Agent Summary	View summary for Today (default), Last 7 Days or Month.
Total Contacts	Total Customer Contacts Received within selected time period.
Complete	Total Mentions Completed within selected time period.
Incomplete	Total Mentions Incomplete within selected time period.
Missed	Total Mentions Missed within selected time period.
Average TTA	Average Time to Assign.
AVG Duration	Duration Assigned.
Average TTR	Average Time Taken to Resolve

Channel Summary

Channel Summary	Today
All Channels	9
Voice	0
Email	7
Chat	0
Social	2
SMS	0
Agent Chat	0

Chnl Summary	View summary for Today (default), Last 7 Days or Month.
All Channels	Displays All Mentions Open & Assigned to Agent.
Channel(s)	Diplays a dynamic list of Channels, depending on the agents configuration. Clicking on a specific Channel loads all associated mentions for that Channel and channel specific Agent Summary statistics.

View Engagement video tutorial...

If you have any further queries around Admin and Engagement options, please contact your account manager.

Supervisor Guide

DigiDesk URL: **https://digidesk.citrustelecom.net/app2** | Username: **Your email** | Password: **Firstname123#**

Analysis Overview

The Analysis section of DigiDesk enables supervisors to analyse customer insight, via a series of real-time widgets. Dashboard views are configurable, and can be saved as unique bookmarks.

View Analysis video tutorial...

Data Overview

The Data Overview section of DigiDesk enables supervisors to review a filtered, tabular view of all records. It is possible to carry out 'bulk actions' on a subset of filtered data through this view.

View Data Overview video tutorial...

Supervisor Dashboard

The Supervisor Dashboard enables supervisors to view a range of engagement statistics, through a series of widgets. The dashboard view is configurable and any view can be saved as a unique bookmark.

View Supervisor Dash video tutorial...

Audit Trail

The Audit Trail enables supervisors to review a filtered, tabular view of all completed records. This view includes resolution codes, time-to-answer stats, and a complete audit trail for every completed mention.

View Audit Trail video tutorial...

Reports

The Reports section enables authorised users to review Analysis, Engagement and Performance reports. All reports can be named and then viewed online, as a PDF file or downloaded as a .CSV file.

View Reports video tutorial...

If you have any further queries around Analysis and Reports, please contact your account manager.

DigiDesk