



Engagement Guide

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

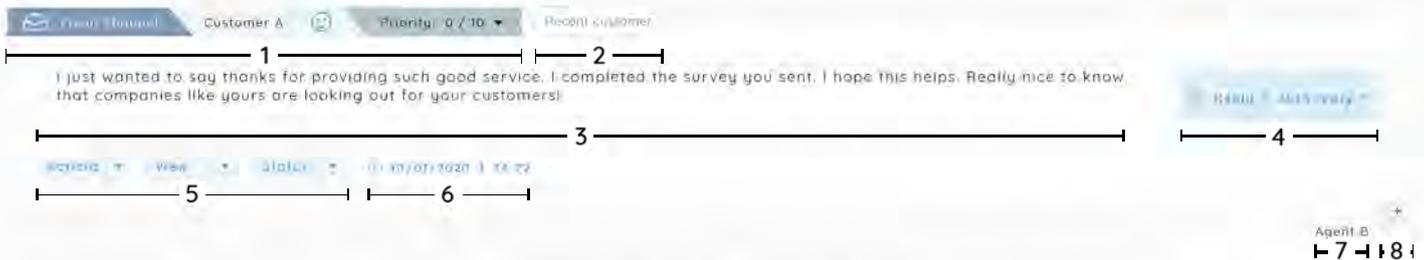
Overview

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, displaying up to 200 characters of the customers mention text. |
| 4. Quick Reply | For Digital mentions, Reply and Auto Reply options. |
| Mid-Call Options | Voice mentions replace Quick Reply options with; Hold, Pause and End Call 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 | For public mentions, a Native Link will also be presented. |
| 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...



I just wanted to say thanks for providing such good service. I completed the survey you sent. I hope this helps. Really nice to know that companies like yours are looking out for your customers!

Reply | Auto reply |

Actions View Status 10/01/2020 | 14:22

View: Conversation history

1

I have a serious problem with everything you've designed previously. I need to speak with someone about this... NOW!

Email: Customer A 04/01/2020 | 11:24 → Agent B

Excellent! Once you've taken a look, feel free to feedback on the current design. We would really appreciate your feedback.

Email: Customer A 11:25 | 4/01/2020 → Agent B

I'd just like to say what an absolutely wonderful bunch of people they employ at DigiDesk. I've dealt with many companies in my time, but none come close to the guys. Thanks again!

Survey 5/5

Email: Customer A 04/01/2020 | 11:28 → Agent B

I just wanted to say thanks for providing such good service, I completed the survey you sent. I hope this helps! Really nice to know that companies like yo...

Email: Customer A 04/01/2020 | 11:49 → Agent B

View: Reply

2

To: Customer A

CC: [redacted]

Subject: HMMMMMM... Nandas?

Formats B I [redacted]

Hi. This is an example reply. Once complete, simply press Send and it will deliver to the recipient and update the conversation history, etc.

Reply | Auto reply | Add attachment | Send

Agent B

1. View Window A

View Windows display interchangeable 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/Transfer To** Reassign or Transfer 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		01m00
Average TTR		01m39

- 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** Voice & Chat: Time To Answer | Digital Other: Time To Assign.
 - **AVG Duration** Voice & Chat: Duration Engaged | Digital Other: 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 Email		0

- Chnl Summary** View summary for Today (default), Last 7 Days or Month.
- **All Channels** Displays All Mentions Open & Assigned to Agent.
 - **Channel(s)** Displays 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...](#)