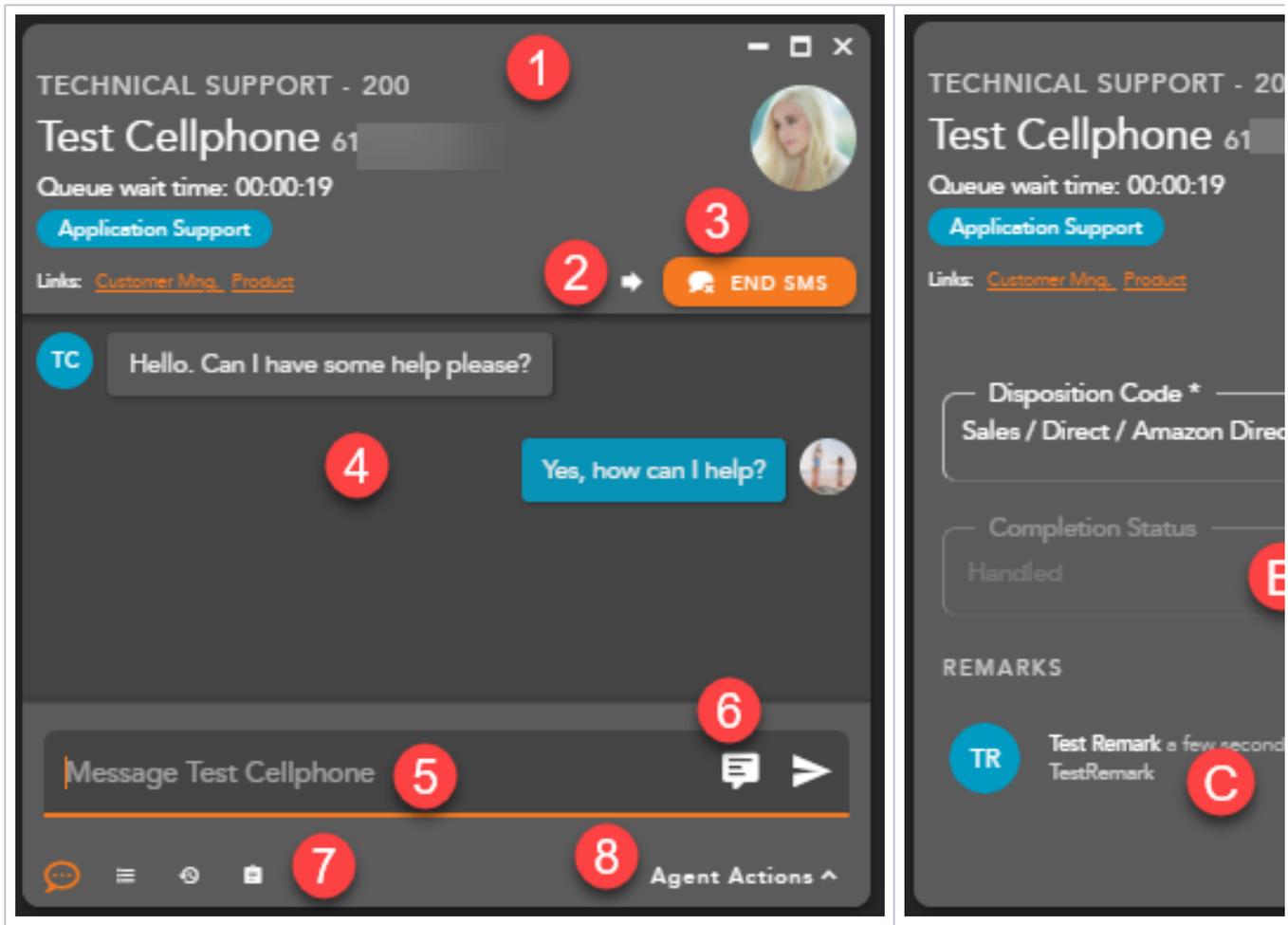


# Handling SMS Interactions

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## SMS Interaction Interface



1. **SMS Interaction Header** - displays the following information:
  - a. **Originating Business Process**
  - b. **Customer Name and Telephone Number**
  - c. **Demands** - if available
  - d. **External Links** - hyperlink to open to a URL configured in the Setup client. The links can integrate with a CRM or internal knowledge base, which contains specific information about a customer or help documents. By clicking on a link, you will be redirected to the predefined URL, providing more detailed information on the person they are working with or help documentation.
2. **Transfer** - initiates a blind transfer to another Agent, Supervisor, BP or Channel.
3. **End SMS** - ends the SMS
4. **SMS Session**
5. **Message Window** - type and send replies back to customers
6. **Canned Responses** - pre-configured SMS responses
7. **Interaction Footer** - contains the CRM information for the contact - Contacts, History and Notes/Remarks.
8. **Agent Actions** - selecting agent actions will change the SMS screen to show the following options:

- a. **Disposition Code** - pre-defined code to indicate the outcome of the interaction. These codes are specific to the Business Process and can be customized for each Business Process.
- b. **Completion Status** - explanation as to why the interaction ended. A status may be selected during or after an interaction. The completion statuses available will depend on the type of interaction handled
- c. **Remarks** - custom remarks relevant to the interaction and customer. Remarks are saved and available for review on the next interaction the customer has with the contact center and can be found in the CRM panel under Notes and Remarks

## SMS Panel

The SMS panel displays your:

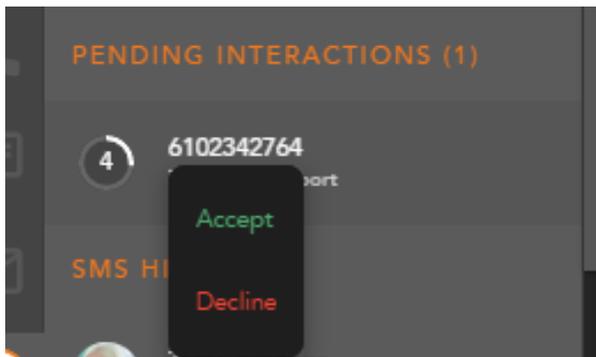
1. **Pending Interactions**
2. **Active SMS**
3. **SMS History**



### Pending SMS Interactions

Within settings, agents can choose how they wish to display their incoming interactions: Banner & Panel, Banner only, or Panel only. If Banner & Panel or Panel is chosen, any incoming pending SMS interaction will show up in the SMS panel. The Banner and Panel will provide the No Answer Time Out countdown, Interaction Type and Originating BP, Name and Telephone number. If the agent chooses to only display incoming interactions through the Banner, the interaction panel will not display pending interactions.

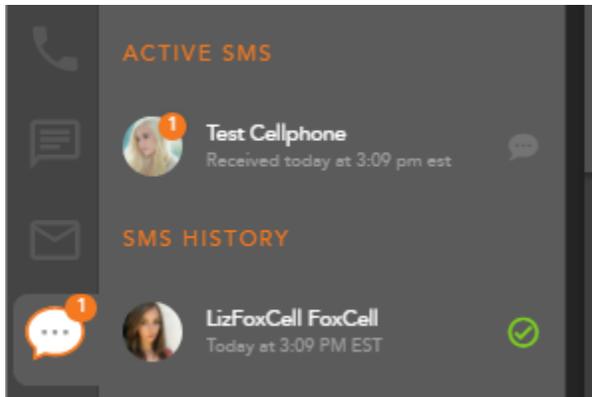
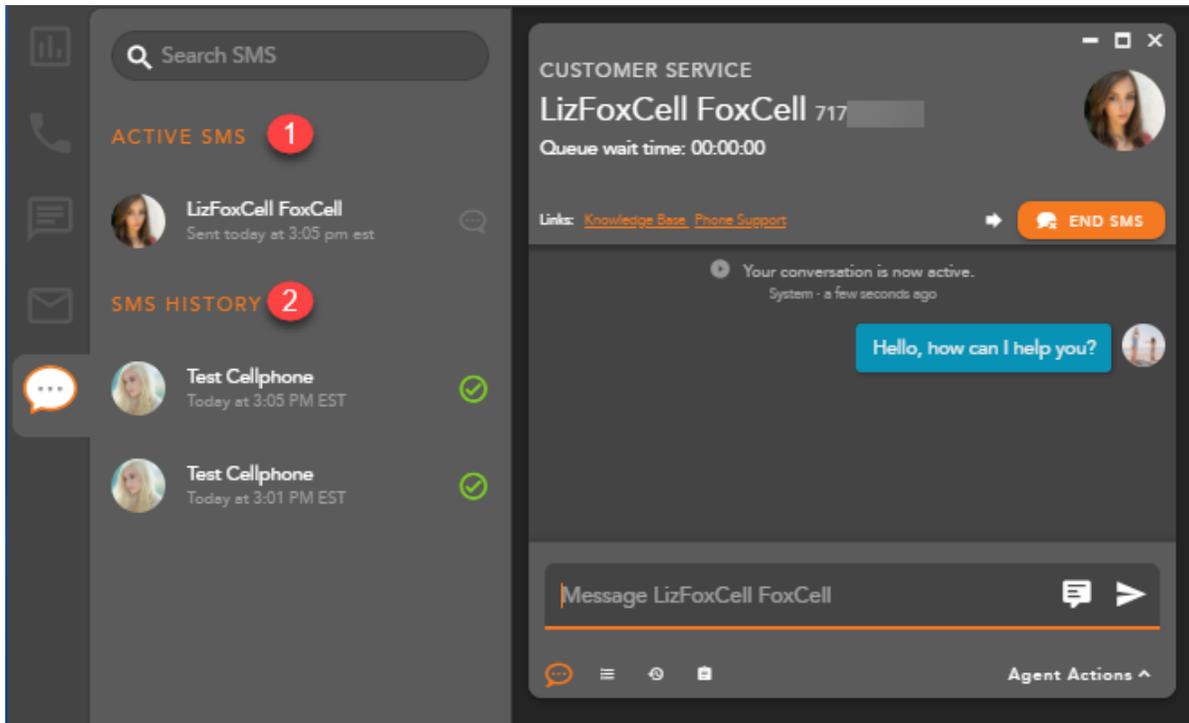
From the panel, by right clicking on the pending SMS interaction, the agent can accept or decline the interaction:



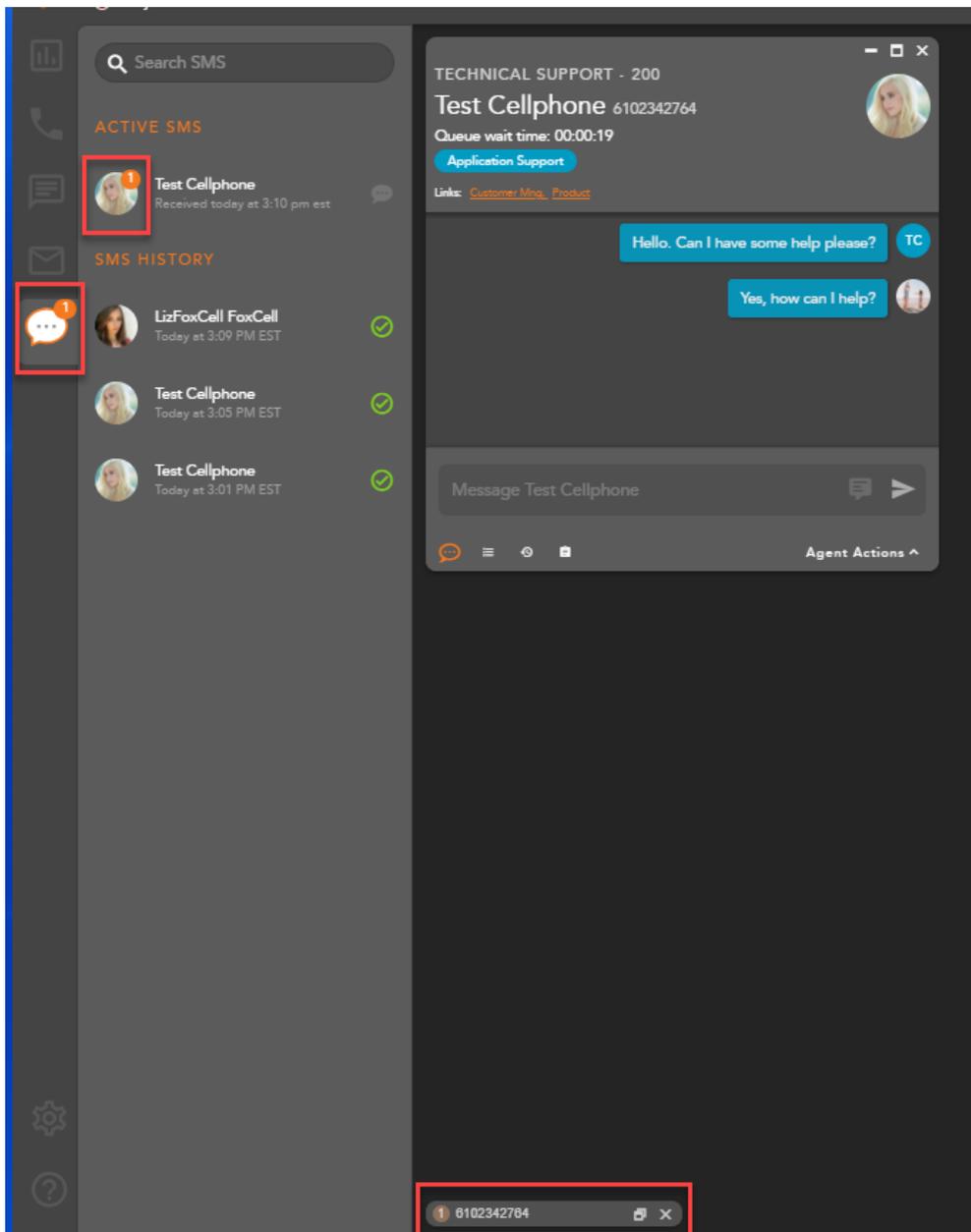
### Active SMS

The Active SMS session displays all active SMS interactions. Each active SMS will display the name or number of the contact and the date and time the interaction was received.

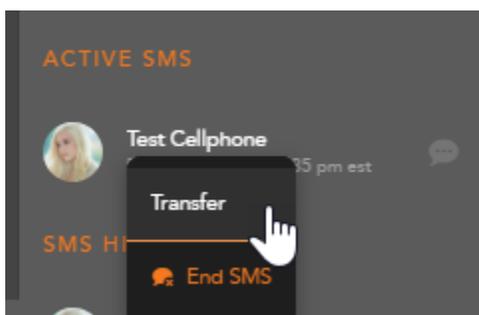
When dealing with multiple SMS sessions, you will be alerted within the panel when you have received a new message from a contact. The messages will increment each time a new message is received.



If a SMS session is minimized, the panel will increment the number of messages received along with providing a visual alert of the waiting interaction to indicate you have new messages waiting.



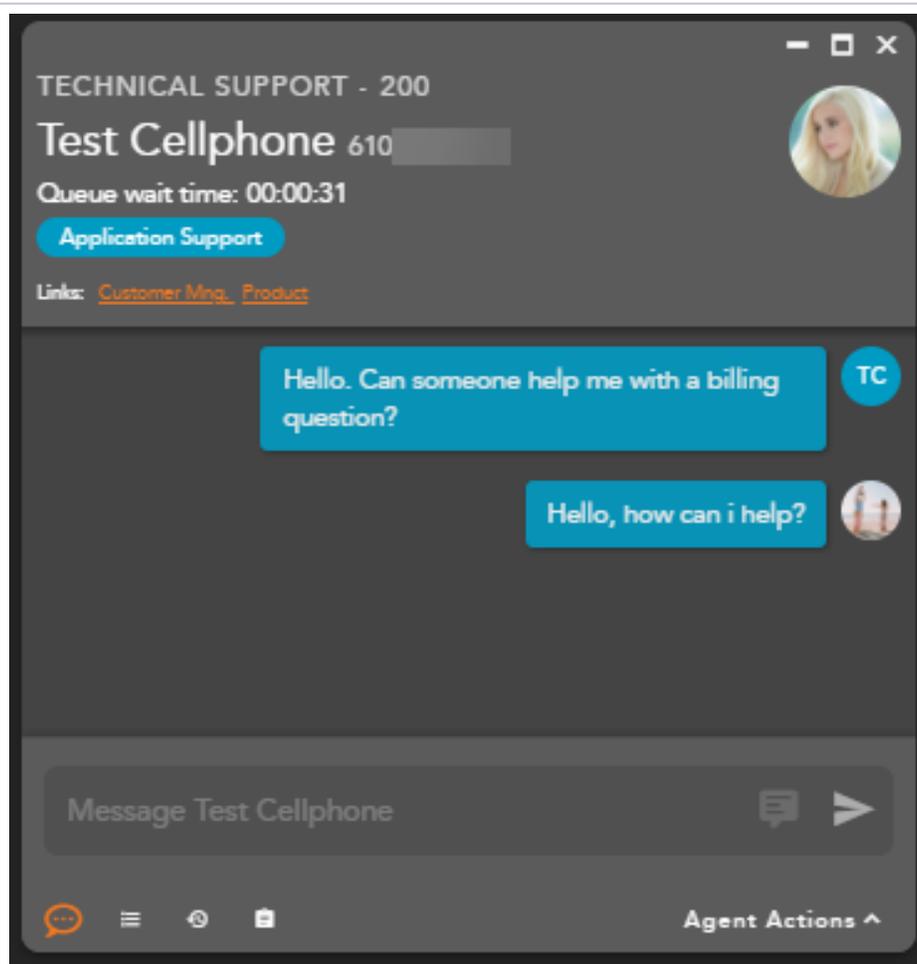
By right clicking on an active SMS within the panel, you will have interaction control to Blind Transfer or End the SMS interaction. For more information on the different interaction controls, see the 'Interacting with a SMS Interaction' section.

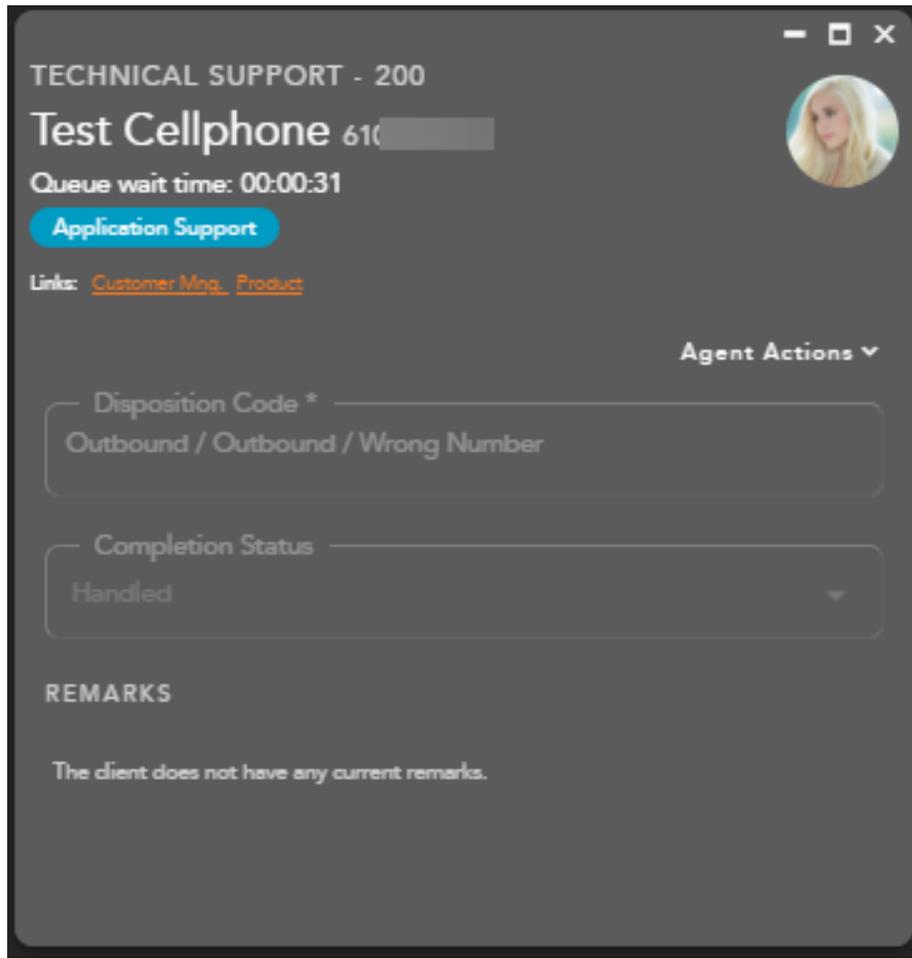


## SMS History

SMS history will show all recent historical SMS interactions, including the customer name and date and time the interaction was handled.

Double clicking on an interaction will open the historical interaction and display the SMS history, Completion Status and Disposition Code applied to the interaction.





## Interacting with a SMS Interaction

### Accepting a SMS Interaction



When a new SMS interaction is being offered to an agent the following information will be present for review before accepting the interaction:

1. **The Interaction Type Originating Business Process**
2. **Customer Name and Telephone Number**
3. **Interaction Handling Remarks** - prepopulated through the Interaction Handling Flow configured in the Setup client. If no remarks are present for the interaction this field will not be visible on the interaction.
4. **Demands** - specific demands assigned to the interaction via the handling flow and utilized to assign the interaction to the appropriate agent
5. **No Answer Time Out** - preconfigured in the Setup Client. If the interaction is not answered within this timer, you will be put into a No Answer State.



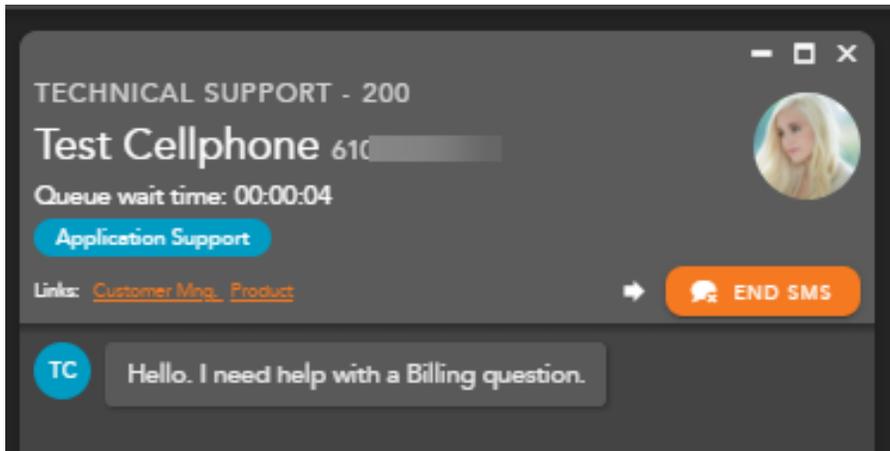
To accept and reply to the incoming SMS, select the  icon



To decline the interaction and send the interaction back to queue, select the  icon. Note, if you are the only ready agent in the BP, the interaction will continue to present itself until accepted or another agent becomes ready.

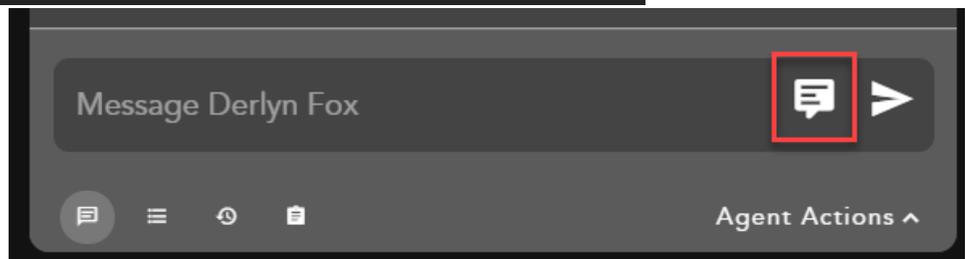
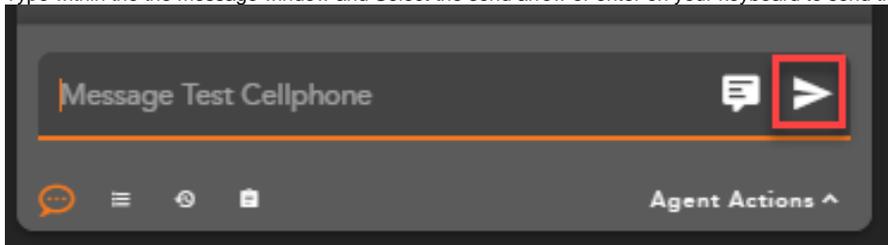
## Responding to a SMS

Once an interaction has been accepted the agent will be presented with the original SMS sent by the contact.

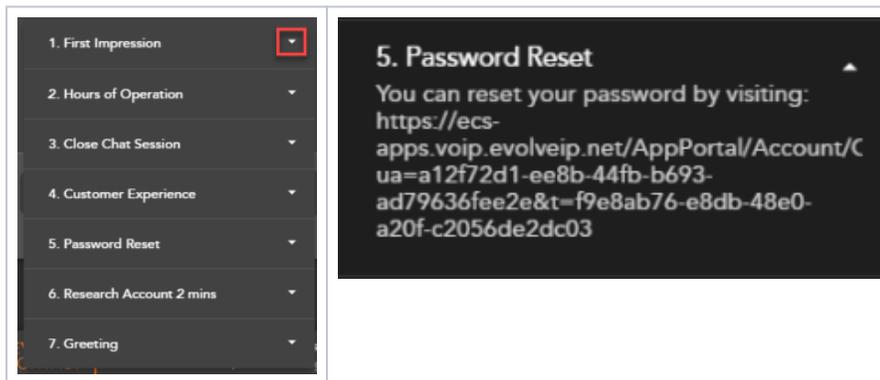


To respond to the contact, you can:

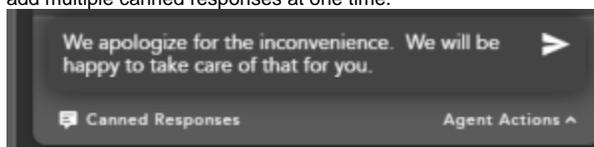
1. Type within the the message window and Select the send arrow or enter on your keyboard to send the message:



2. Utilize a Canned Response -
  - a. A list of available responses will appear. Select the arrow for a preview of the response.



- b. Once a response has been selected, it will appear in the message window to allow for edits before sending to the contact. You can add multiple canned responses at one time.

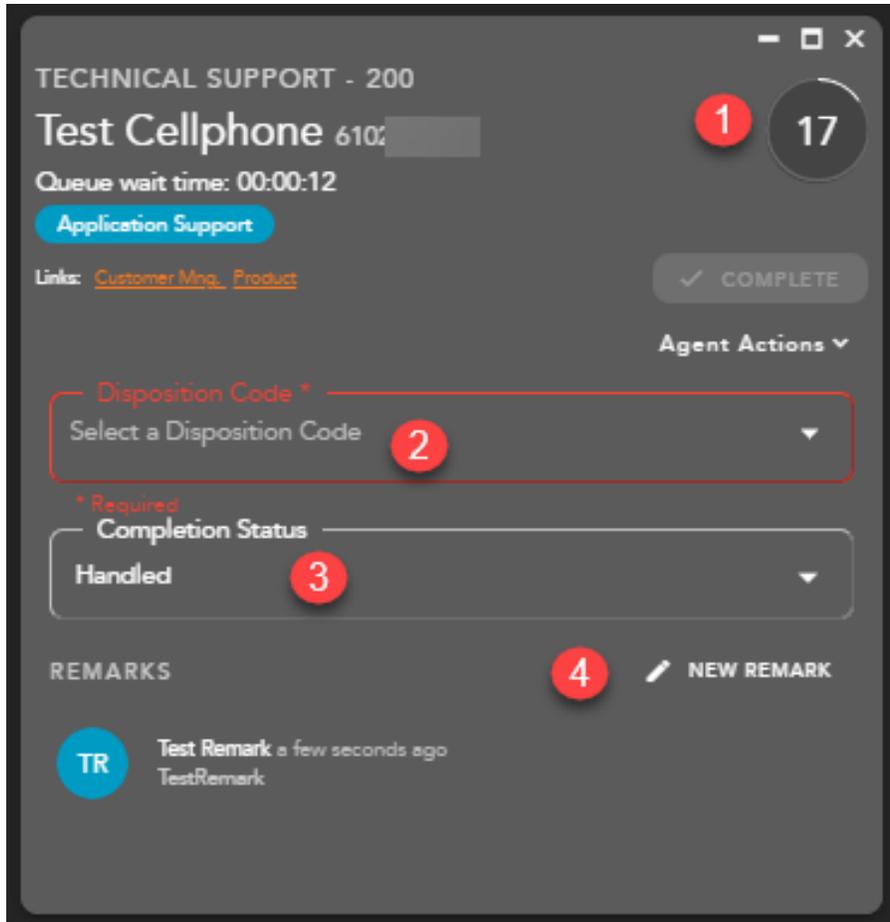


## Completing an Interaction



To end a SMS interaction, select End SMS. Ending the SMS will end the interaction with the contact and automatically put you in a wrap-up state if wrap-up has been pre-configured in the Setup Client. If no wrap-up has been configured, you will automatically be put back into a Ready state.

If Wrap-up has been configured, the following options will be available to complete the interaction:

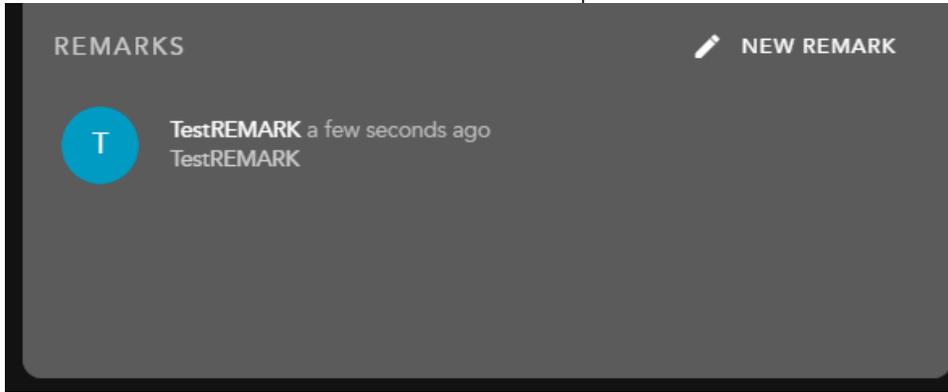


1. **Wrap-up Timer** - counts down the amount of time left in wrap-up
2. **Disposition Code** - apply a disposition code to the interaction. If no disposition codes have been configured for the originating BP this option will not be available. By default, your three most used disposition codes for the originating BP will be at the top of the disposition drop down, followed by all disposition code categories and subcategories. If the disposition code is mandatory, that option will appear in red. You must select a disposition code before you can complete the interaction
  - a. If the disposition code is mandatory, that option will appear in red. You must select a disposition code before you can complete the interaction

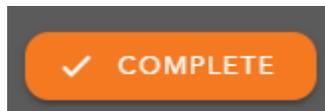
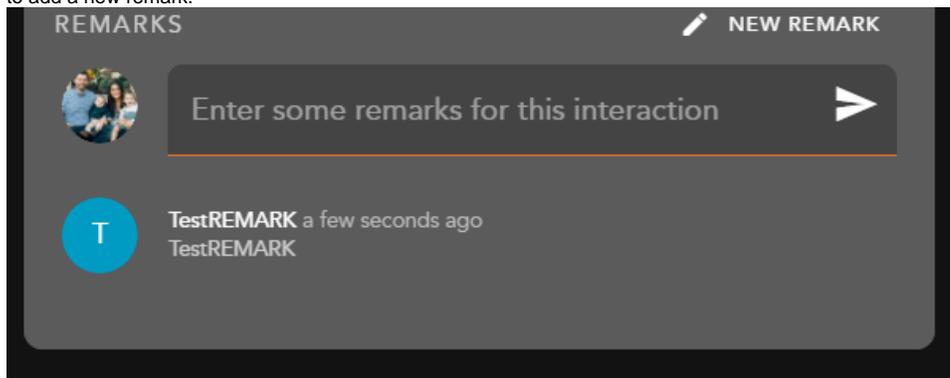


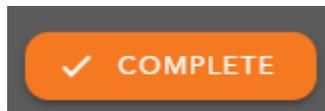
3. **Completion Status** - end result of the interaction. The completion statuses available will depend on the type of interaction handled.
  - a. Handled - default value for completed interactions. The interaction was completed and handled.
  - b. Delegate to Supervisor - this option is only available if enabled for agents in the Setup Client. Once a interaction has ended, agents can delegate a the interaction to a Supervisor with remarks attached providing an explanation as to why the interaction has been delegated to a supervisor

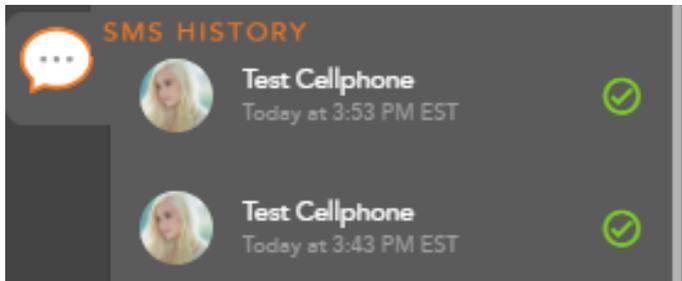
4. **Remarks** - custom remarks relevant to the interaction and contact. Remarks are saved and available for review on the next interaction the contact has with the contact center and can be found in the CRM panel under Notes and Remarks.



- a. To add a new remark to the interaction select . Once selected the remarks field will open to add a new remark.



Once you have filled in the required fields select . This will complete the interaction and put you back into a Ready state. If you do not manually select complete and wrap up is configured, the interaction will complete automatically after the wrap-up period has ended. Once an interaction has completed, it will appear under your SMS history within the Interaction Panel.



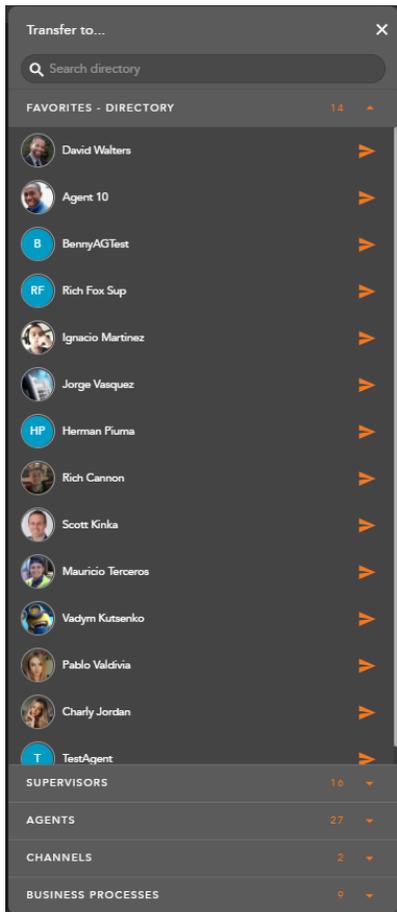
## Transferring a SMS

### Blind Transfer

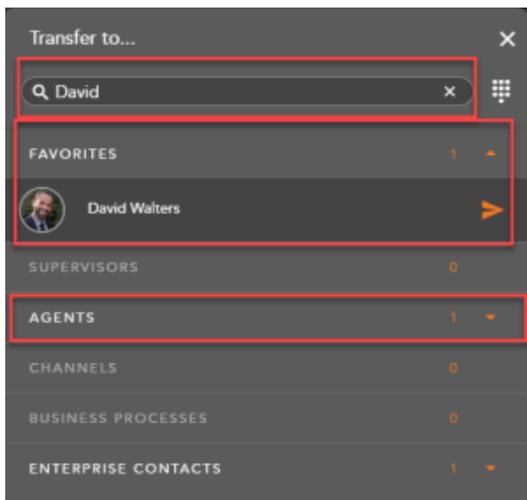


To transfer a SMS to another Agent, Supervisor, BP or Channel, select the Transfer Icon  within the SMS window.

The Transfer window will open and by default your favorites will be expanded.

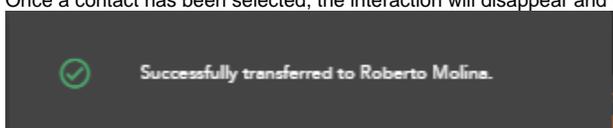


Within the search bar you can type the name of the Agent, Supervisor, BP or Channel you wish to transfer the interaction. As you begin to type, the window will filter each category and make available only the contacts that match your search criteria.

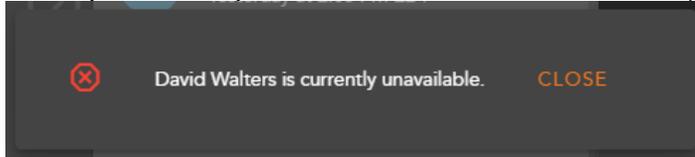


Select the transfer arrow to complete the blind transfer.

Once a contact has been selected, the interaction will disappear and you will receive a successful transfer message



**Note\*** If the contact is in a busy or offline state you will be unable to transfer the interaction. Attempting to transfer to an unavailable contact will result



in an error message

## Initiating an Outgoing SMS Interaction

To initiate an outgoing SMS, the agent must first be in a Ready or Handling Outgoing state. There are two places an agent can initiate an outgoing SMS interaction; the Floating Actions Button (FAB) and the Contacts Tab.

### Initiating an Outgoing SMS through the Floating Actions Button