

ECS Setup: Implementation - Text Template Repository

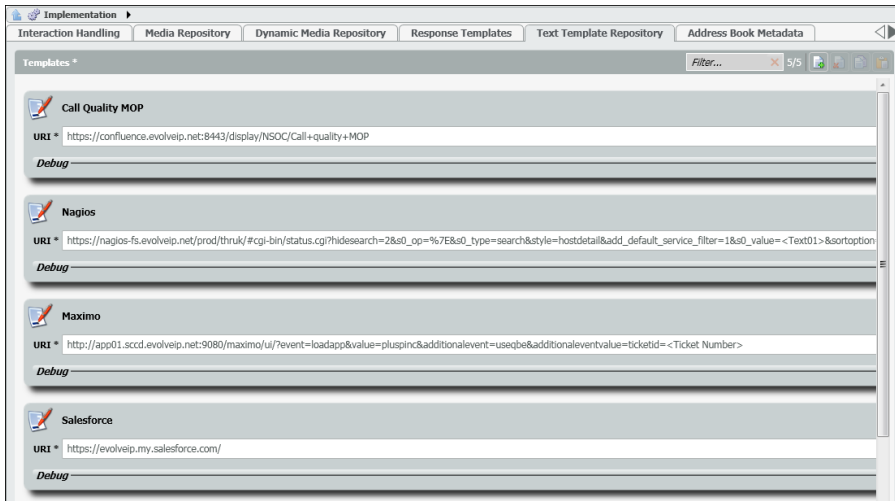
Implementation: Text Template Repository

The Text Template Repository allows you to create dynamic links found in the agent client to launch different applications for the agent. Each Business Process can deliver up to three dynamic links to the agent when receiving an inbound interaction or placing an outbound call.

The link can be manually launched by the agent or automatically launched by the system. For example, a customer may be asked to enter in the ticket number they are calling about during the initial call flow. When they input the ticket number, the dynamic link within the agent client will take the agent directly to the appropriate ticket within their customer support system or as another example capture the caller information to open up within your CRM.

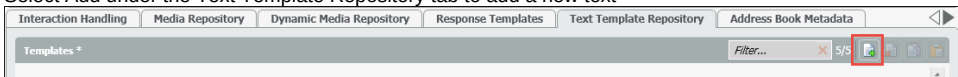
The Text Template Repository is the first step and foundation for adding this capability into your call flow to deliver to an agent.

- [Adding a Text Template](#)
- [How to Apply a Text Template](#)

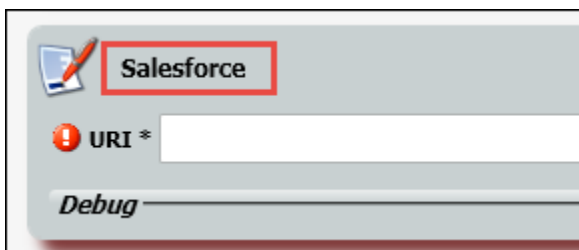
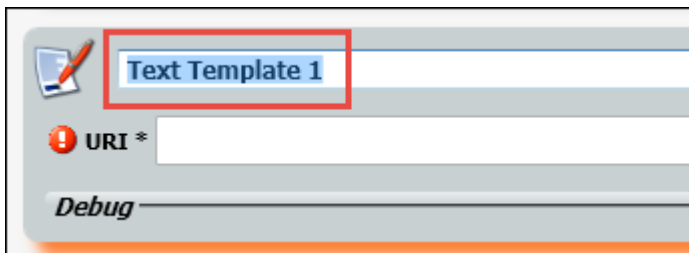


Adding a Text Template

1. Select Add under the Text Template Repository tab to add a new text

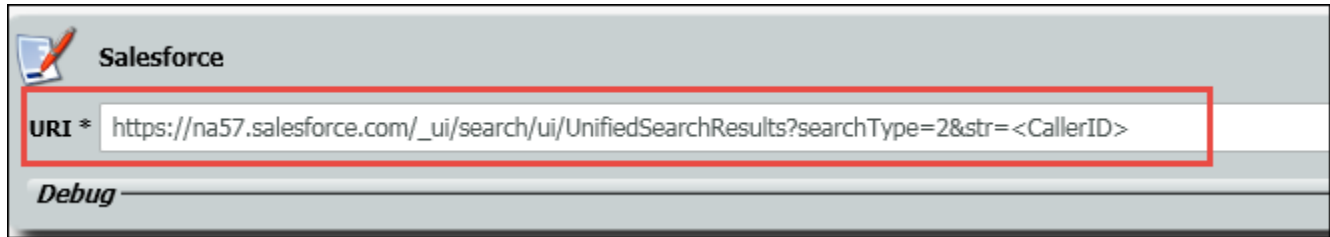


2. A new template will open. Enter in the name of the template. The name of the template is what will appear as the dynamic link in the agents client.



3. Enter in the URI. The URI is where the agent will be redirected when they click on the link within the agent client.

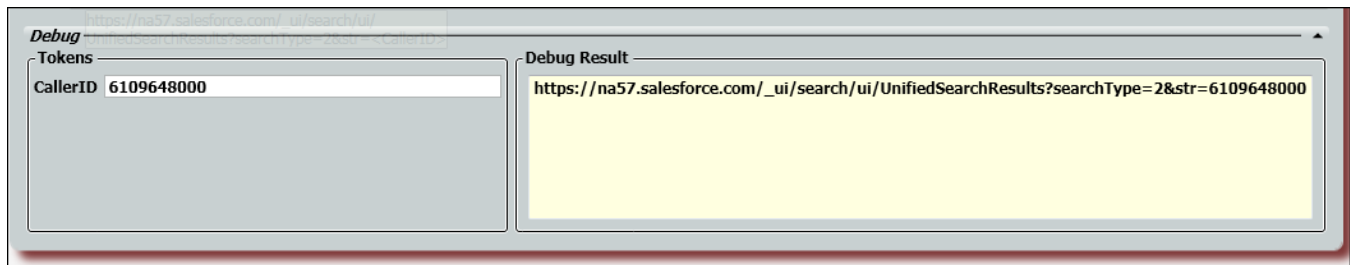
In this example, our URI is going to do a lookup in Salesforce based on the callerID. When the callerID is captured it will input it into the link, so when the agent clicks on the Salesforce link in their agent client, it will take them directly to the callers contact page found within Salesforce.



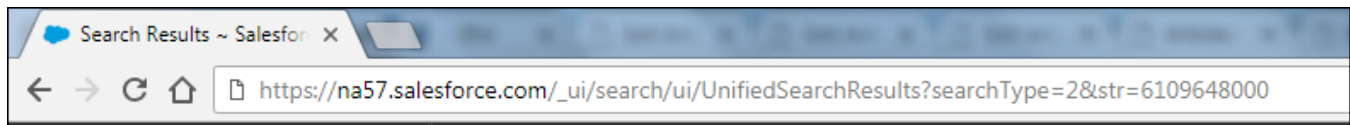
The screenshot shows a configuration window for Salesforce. At the top, there is a header with a Salesforce logo and the word "Salesforce". Below this, there is a text box labeled "URI *" containing the URL: `https://na57.salesforce.com/_ui/search/ui/UnifiedSearchResults?searchType=2&str=<CallerID>`. A red rectangle highlights this text box. Below the text box, there is a "Debug" button.

4. Debug allows you to see an example of what the URI will look like if additional information is needed outside of the link.

In the example below, a DID has been entered within the token text box and the URI has been updated to include the DID. Copy and paste the updated URI into a web browser will help verify the correct information will populate for the agent.



The screenshot shows a "Debug" window. On the left, under "Tokens", there is a text box labeled "CallerID" with the value "6109648000". On the right, under "Debug Result", there is a text box showing the updated URI: `https://na57.salesforce.com/_ui/search/ui/UnifiedSearchResults?searchType=2&str=6109648000`.

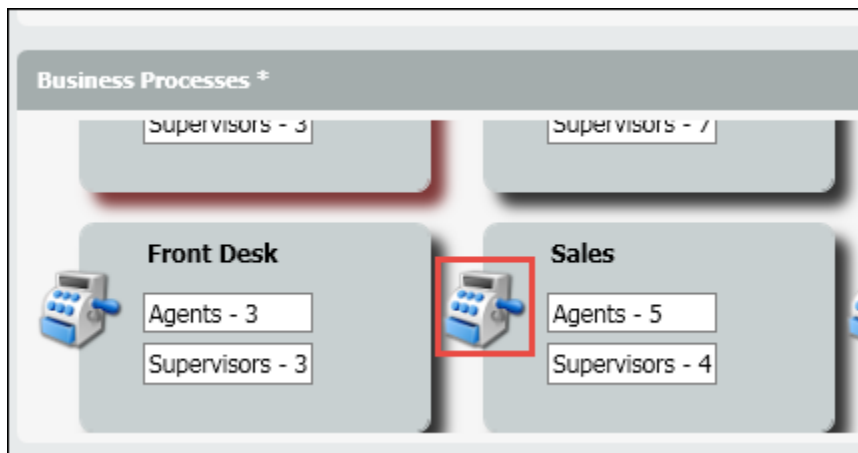


The screenshot shows a web browser window with the address bar displaying the URL: `https://na57.salesforce.com/_ui/search/ui/UnifiedSearchResults?searchType=2&str=6109648000`. The browser title is "Search Results ~ Salesforce".

How to Apply a Text Template

Once you have created a text template there are a few extra steps that must be taken in order for it to appear within the agent client.

1. First you will need to drill into the specific business process you wish to apply the template to within the business processes handling defaults tab.



The screenshot shows the "Business Processes" handling defaults tab. It displays a hierarchy of business processes. At the top, there are two boxes labeled "Supervisors - 3" and "Supervisors - 7". Below these, there are two main sections: "Front Desk" and "Sales". The "Front Desk" section has a box labeled "Agents - 3" and "Supervisors - 3". The "Sales" section has a box labeled "Agents - 5" and "Supervisors - 4". A red rectangle highlights the "Sales" section.

2. From the handling default tab, you will see Link Aliases. Link Aliases is where you will manually enter in the name of the text template you wish to apply. You will want to enter in the same name you applied within the text template repository.

The three options you have to enter in a template are: Customer Management Link, Location Link and Product Link. In this example and screen shot below, we have added our Salesforce template to the Customer Management Link.

You will also notice that you can choose three links for any outgoing interactions to show up in the agent client. But for this example we've chosen to only demonstrate links to agents for incoming interactions.

Business Structure EIP Sales

General Handling Defaults Handling Timeouts Staff Interaction Handling Flow Disconnect Handling Flow Flow Variables

End Point * 202

Automatic Popup Link Select the relevant item

Disposition Code Mandatory Yes

Assign Email To Last Handling Agent Enabled

CRM Display Template Sales Display Template

Change Interaction Origin on Business Process Transfer Default

Campaign/Callbacks Pending Management

Supported Campaign Types Visible: 0 Total: 0

Predictive Preview Power

Max Concurrent Campaign Deferrable Calls 100

Max Concurrent Call Paths For Auto Dialer 50

Link Aliases

Customer Management Link Salesforce

Location Link Questionnaire

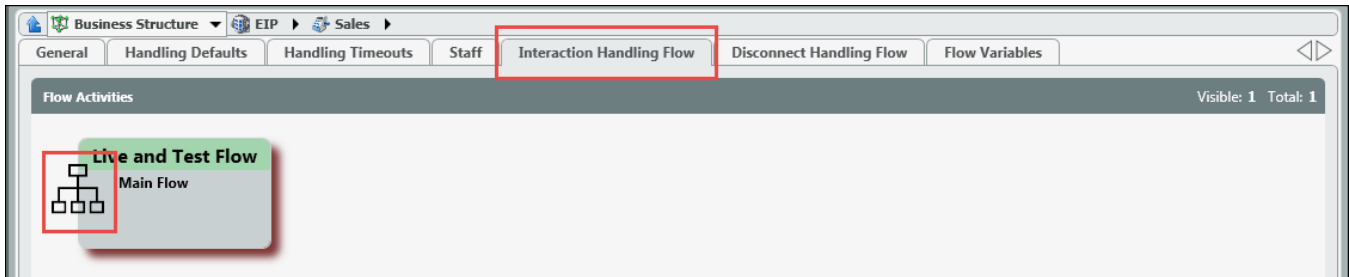
Product Link KB

Customer Management Link Outgoing Default Select the relevant item

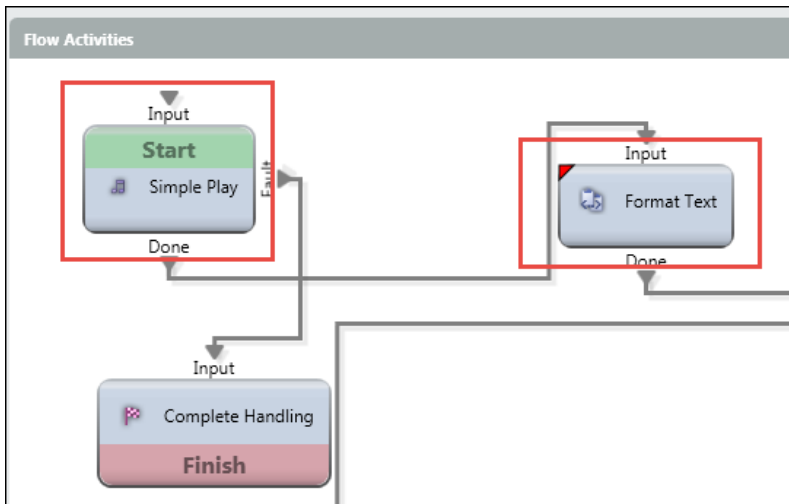
Location Link Outgoing Default Select the relevant item

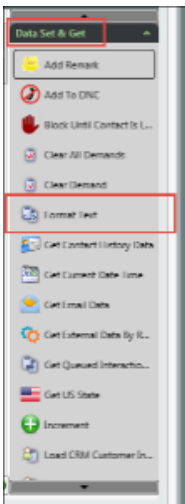
Product Link Outgoing Default Select the relevant item

3. Once you have added in the names of the templates. Click on the Interaction Handling Flow tab within the same business process and drill into the flow.

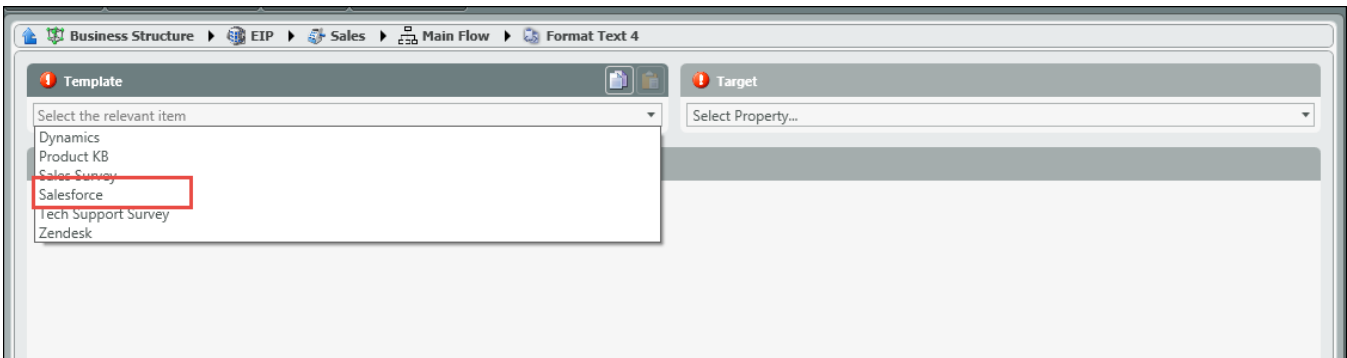


4. To add the template to the agents client, you will need to add a Format Text handling node found under the Data Set & Get nodes at the beginning of the call flow. You will drag the node onto the flow and attach the node to the first start node.

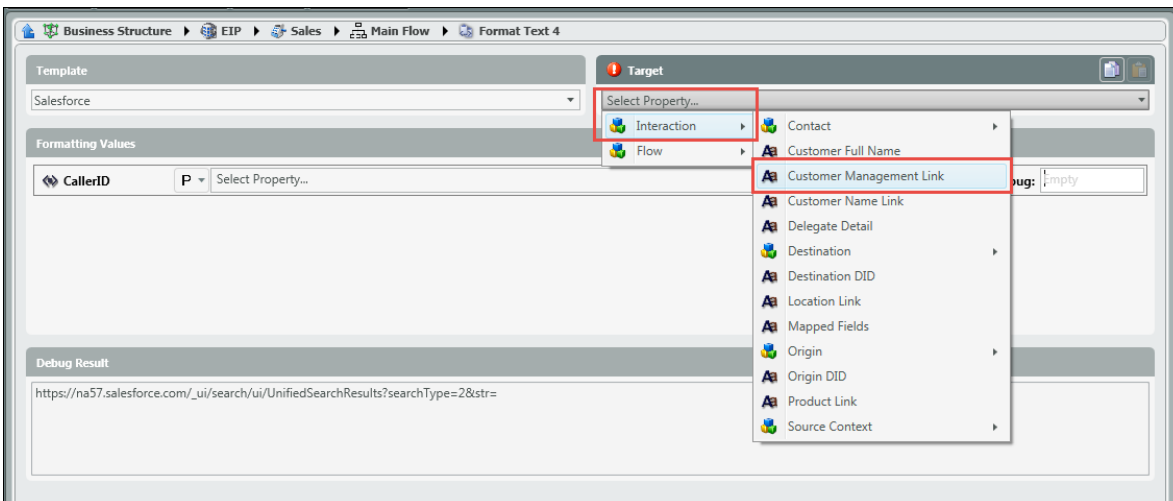




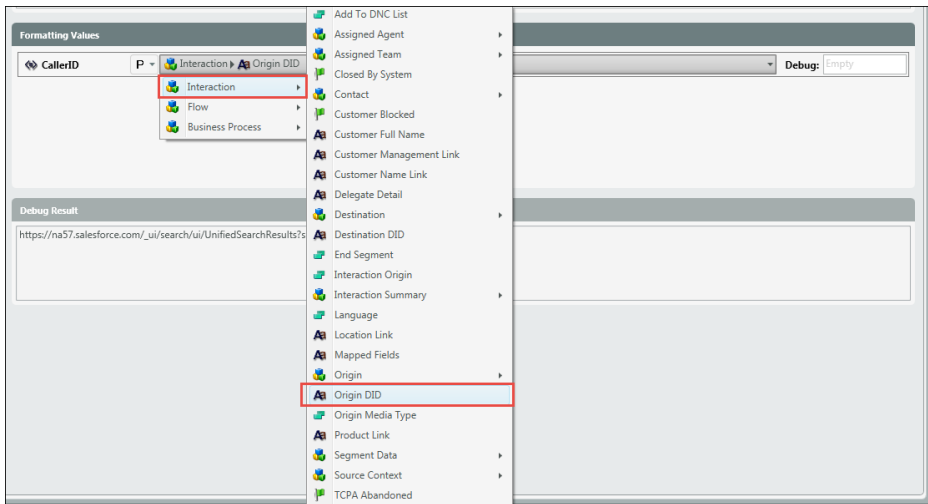
5. Drill into the Format Text node by click on the icon.
6. From the template drop down, select the template you wish to pass to the agent.



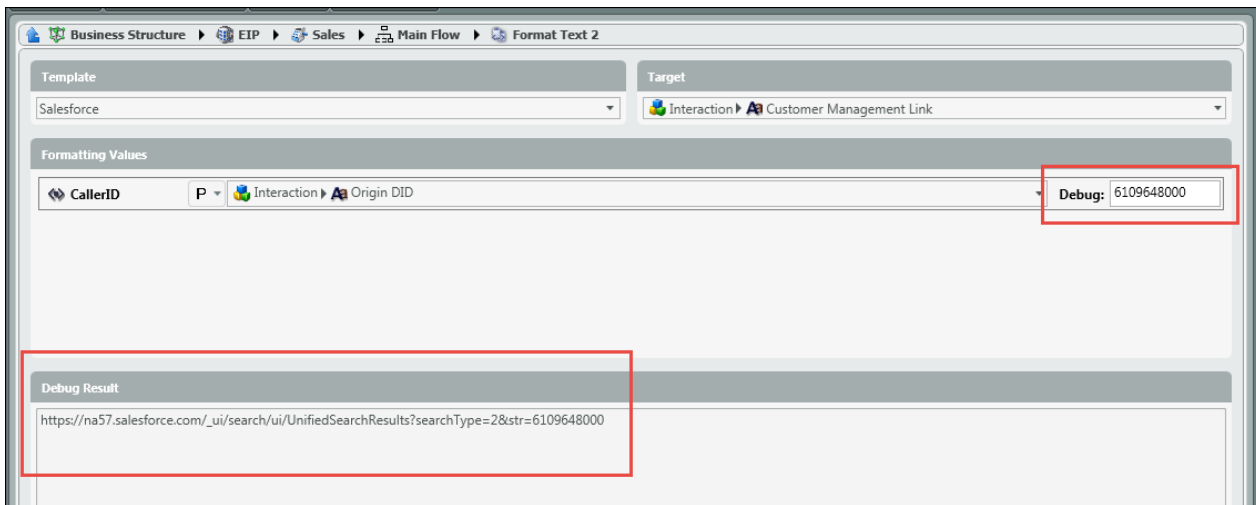
7. From the Select Property drop down, select Interaction and then select whichever Alias Link you input the template. For our example, we put our Salesforce template under the Customer Management Alias Link (within the handling defaults tab), so we will select Customer Management Link.



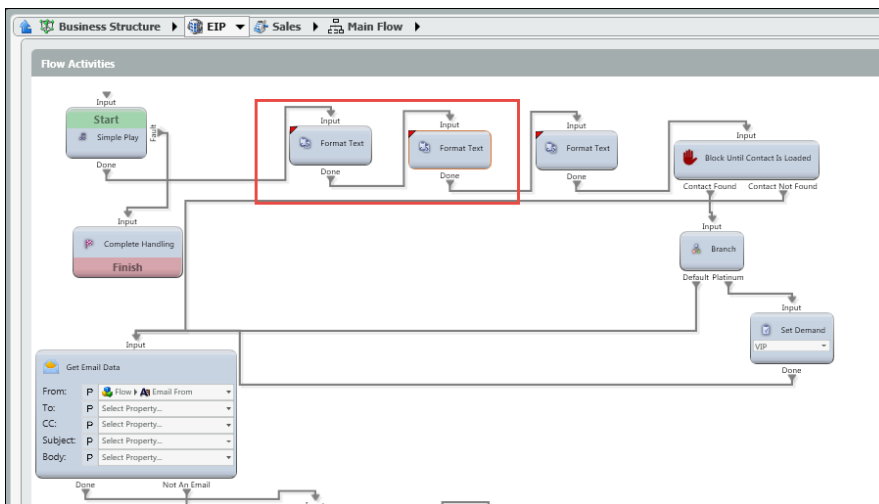
8. Under Formatting Values, it may require you to add an additional parameter. This will all depend on the URI that you are using within the template. For our example, we are using Salesforce with a callerID lookup. Within the Formatting Values, we need to search under property for Interaction > Origin ID because we are looking to capture the originating callerID of the customer.



9. Debug under Formatting Values, similar to the Text Template Repository, will give you a sample of what the URI link will look like and present to the agent if a DID is entered in the debug text box.



10. Once you have finished editing the Format Text node, you will want to connect it to the next handling node in the flow. In this example we are connecting it to another Format Text node because will be presenting the agent with more then one text template (dynamic link) in the agent client.



11. When an agent gets an incoming interaction they will see the text template links located under 'Links' within the agent client.

Billing 1717201867700:00:06

2:19 PM

717201867700:00:06

StateHandling

TypeIncoming Telephony

Customer

Entry Time2:18 PM

Origin7172018677

Destination6102634100

Business ProcessBilling

Demands

Waiting Time00:00:04

Remarks0

Links

Customer Mng.
Location
Product

Previous Attempts0 previous attempts

Disposition Code

Completion StatusHandled

Add To DNC ListNo

123Telephony Sessions

Contact

Search

History

Notes

Phone 17172018677

MemberID

Phone 2

Title

First NameElizabeth

Last NameFox

Email

Address

City

State

Zip

Customer Tier

Appointment Date

Last Survey Score0.00

Company

Phone 3

Telephony