

## **Visits Help**

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# Chapter 1. Visits

The Visit manager allows users to track, manage, and respond to phone calls, chat sessions, and walk-in or in-person meetings with customers. These interactions are recorded in the system as visits. Users add visit actions to visits to record customers' questions and to perform various actions in the system, as necessary.

## Chapter 2. View a Visit

You can view all visits in the system from the Visit manager.

To view a visit from the Visit manager:

1. Access the Visit Manager.
2. View the **Summary** tab.
3. You can view visits by:
  - Clicking the hyperlinks on the Active Visit Summary panel to:
    - View active visits;
    - View visits in progress;
    - View visits waiting to be answered;
    - View the current average wait time.
  - Clicking the hyperlinks on the summary panel to view a summary of visits.

## Chapter 3. View Visit Information from the Customer or Account Springboard

You can view visits associated with a customer or account from the Customer or Account springboards, respectively.

To view visit information for a customer or account:

1. Access the appropriate Customer or Account springboard.
2. View the **Visits** tab (under Letters). A list of active and historical visits for the customer is displayed.
3. Click the hyperlink in the **Visit** column. The Visit springboard is displayed.

## Chapter 4. View Active Visits

You can view a list of all visits that have not yet been completed from the Visit manager.

To view a list of all active visits:

1. Access the Visit Manager.
2. In the Active Visit Summary panel, click the **active visits** hyperlink. A window is displayed, listing all active visits.



**Note:**

You can refresh the statistics in the Active Visit Summary panel by clicking the window name in the sidebar, or by pressing the **F5** key on your keyboard.

# Chapter 5. View Visits in Progress

You can view a list of all visits currently in progress from the Visit manager.

To view a list of all visits in progress:

1. Access the Visit Manager.
2. View the **Summary** tab.
3. On the Active Visit Summary panel, click the **in progress** hyperlink. A window is displayed, listing all visits in progress.



**Note:**

You can refresh the statistics in the Active Visit Summary panel by clicking the window name in the sidebar, or by pressing the **f5** key on your keyboard.

## Chapter 6. View the Current Average Wait Time

You can view the average wait time for all visits that are unassigned. This summary includes the amount of time that a visit has been waiting and the amount of time that a visit has been on hold.

If there are no unassigned visits in the system, the current average wait time is zero (*0.00*).

To view the current average wait time:

1. Access the Visit Manager.
2. View the **Summary** tab.
3. The average wait time is displayed on the Active Visit Summary panel next to the Clock ⌚ icon



**Note:**

You can refresh the statistics in the Active Visit Summary panel by clicking the window name in the sidebar, or by pressing the **f5** key on your keyboard.

4. Click the **minutes average wait time** hyperlink. A window is displayed, listing all visits currently contributing to the average wait time.



# Chapter 7. Manually Add a Visit

Depending on your agency's configuration, visits may be automatically or manually added to the system. If needed, you can manually add a visit from the Visit manager.

To manually add a visit from the Visit manager:

1. Access the Visit Manager.
2. In the Add Items panel, click the **Add Visit** hyperlink.
3. Complete the fields, as necessary.
4. Click the **Submit** button. The visit is added to the system.