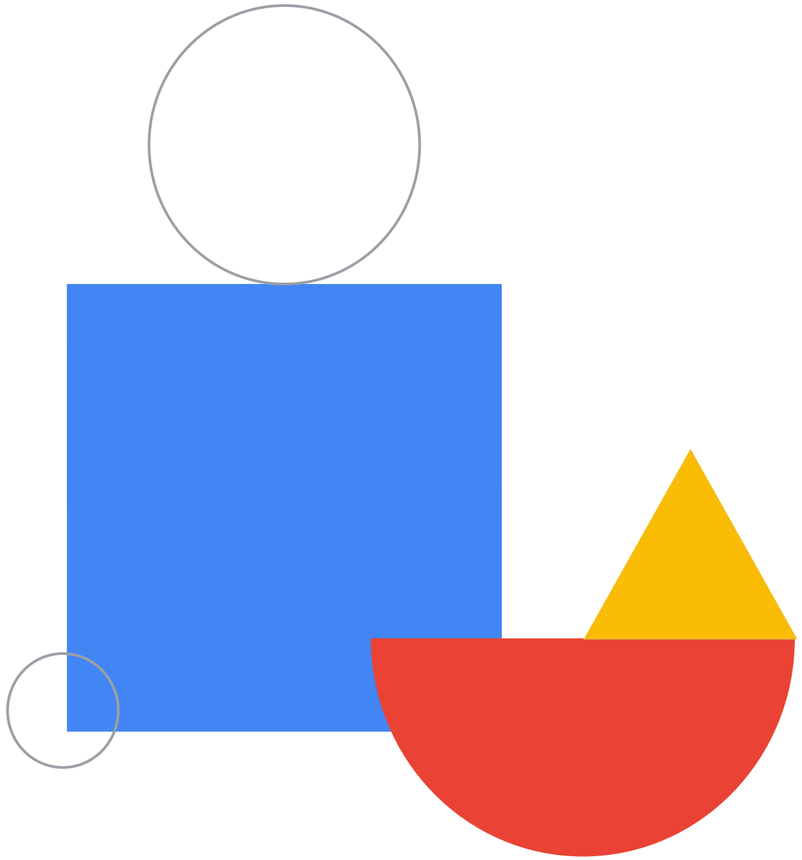
Module 4: Chat with CCAIP



Manager Training

In this module, you learn to ...

01 Recognize various channels that leverage chat

02 Identify the chat capabilities within CCAIP

03 Recognize routing and setting options for chat

01

Recognize various channels that leverage chat

Mobile SDK

- The CCAIP mobile software development kit provides everything you need to maximize customer service in your company apps.
- The mobile SDK embeds chat (and voice) into your company app.

Web SDK

- The CCAIP website software development kit provides everything you need to maximize customer service on your company website(s).
- The web SDK embeds chat (and voice) into your company website.

SMS

- SMS with CCAIP includes inbound and outbound messaging via the SMS channel and outbound SMS API (all sessions with live agents or VAs).
- SMS deflection is available (pre-session SMS, in-call SMS, and wait time SMS).
- Session-less SMS API is available.

	Blended SMS				**Outbound SMS APIS (session based and session-less)**	
	Wait time SMS	In call SMS	SMS channel	Pre-session SMS deflection	Outbound SMS API	Session-less SMS API
The platform sends predefined messages	x			x	x	x
Agent can send custom messages		x	x			
Agent can send predefined messages		x	x			
Requires active IVR call	x	x				
Starts with IVR, switches to SMS				x		
EWT threshold setting	x			x		
Associated with an active session	x	x	x	x	x	

Identify the chat capabilities within CCAIP

General Chat Capabilities

Note: This is not an exhaustive list of all chat features and functionality.

01

Chat features

- Chat shortcuts
- Agent Assist
- Transfers
- Add third parties
- Target response time
- Message preview
- “View case” - to toggle between concurrent chats
- Auto translate
- SmartActions

02

Agent performance

- Live agent monitoring
- Chat dashboard
- Live chat monitoring
- Historical reporting

03

Administration

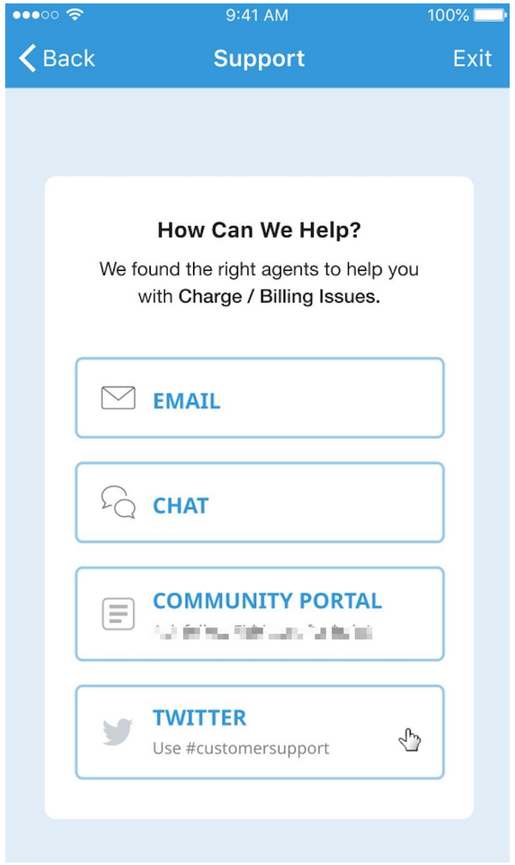
- Chat concurrency
- Routing
- Inactive chats/dismissed chats
- Chat queues in multiple languages
- Chat queues with VAs
- Proactive web SDK triggers
- External deflection links

Recognize routing and settings relevant for the manager role

Chat routing:

The entire routing process is dictated by a combination of consumer, agent, and other design decisions made across your CCAIP Queue, Chat, and Operations Management Settings.

When a consumer initiates a Chat via Mobile, Web, or SMS entry points, they will typically select a queue from a list of presented menu options. In some cases, they can be routed directly to a queue through a direct access point.



Chat routing:

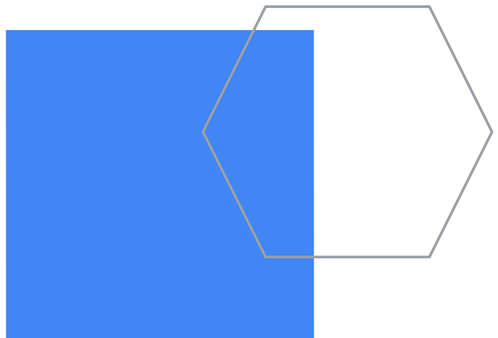
Once a menu selection has been made or access point determined, the consumer experiences one of the following:

- **Immediate agent assignment**: Administrators have the flexibility to choose from a variety of agent assignment options, including deltacast, multicast, and auto-answer. These options dictate the selection, assignment, and/or presentation of a consumer Chat to one, some, or all agents.
- **A brief wait owing to agent availability**: Administrators have the flexibility to define which menus, queue & access points are available based on timers and current wait times. The timing of agent assignment can also be further defined by additional options such as queue priority settings, priority user segments, or chat types such as new inquiries or transfers.
- **Automatic redirection to another website or a standardized message**: Administrators have the ability to explicitly define the website or message for each queue within your CCAIP Queue Settings.

Note: While these features can be configured by administrators, those with the manager role cannot change the routing configuration settings. However, chat routing works the same as call routing (covered in a previous module).

Chat concurrency:

Agents can be configured to handle more than one support session simultaneously. Typically agents are permitted to handle 1-3 chats simultaneously.
Note: It is possible to assign agents to both chats and voice calls concurrently.

Administrators can set the maximum number of chats an agent can be assigned at any given time with the chat global settings. This applies to all agents assigned to chats from any chat channel. This value can be overridden for an individual agent within their profile, located in the **Users & Teams settings**.

In addition to defining the maximum number of chats via your chat global settings, you can also determine if agents are permitted to receive new chats while on a call and/or new calls while on a chat.
Note: These options require that an agent be assigned to a voice queue in order to receive calls.