How to Use Communicator - Overview

<h2>GUIDE.SUMMARY Internal Information This article explains how to use Communicator. FAQ for Teammates Install and Sign in / Sign out Home screen Aux Codes Actionbar Recent Contact / Recontact Management <ul> Recent Contact flag Recent SR view   Multi-interaction Communicator <ul> Phone Secondary tab Chat   CSKB web interaction Snippets Verification <ul> Verified Call

Unverified Call Hard Verification   Add or remove a Secondary Contact SR Sub Status - SR closure reasons Info Requested, Holds / Retrieve, and Pause SR <ul> Info Requested Holds / Retrieve Pause SR   Email font, spell checker, translations and attachments Transfers <ul> Email Chat Phone Escalation Transferring to a Different Region / Language Warm and Cold Transfers   Outbound Calls and Outbound emails <ul> Outbound Calls Outbound emails <ul> How to use templates   Creating an Offline SR from an Online contact in Unify-AD </h2><h2>GUIDE.RELATED_LINKS Related tools <ul> https://csrtools/Communicator Related articles <ul> Transfer Guide for CS Phones, Chat, and Email Escalation and Customer Experience Guidelines Chat standard operating procedures How to Use Agent Desktop (AD) - Overview Outbound Calls   </h2><h2>GUIDE.TALKING_POINTS Internal Information <h3>FAQ for Teammates</h3> Is it possible to paste a number into the outbound phone dialer? Yes. You can copy a phone number just like you can a member name. How do we send an email to an address that is not associated with an eBay account? Create a new outbound email on the Communicator home screen. Select Email Address instead of Username from the dropdown menu. Enter the email address. Select Create to start your email. Do I need to leave a note for every interaction? See our notes guidelines in the Fundamental service policies for customer service article: Where will the teammate see the note from the previous teammate on a transfer/escalation? Any note left in Communicator will appear in SR Notes. Can I copy the SR number from Communicator into an email or notes? Yes, you can copy the SR number from Communicator. Does hard verification carry over if you transfer the call, or will the teammate have to do that again once connected? Yes it does, so there is no need to hard verify again. If Communicator is down for whatever reason or crashes, do I report it to eWatch? Yes, report any Communicator outages to eWatch File an eWatch request as it is today - the link to eWatch can be found within the expandable menu at the bottom of any CSKB page See "Detailed Information > Technical Issues with Communicator" in this article What do I do if the phone number from which the member is calling does NOT match the phone number registered to the account? A window opens in Communicator asking if the phone number needs to be updated In this window you can select that the number must be updated and then click Submit The member will automatically receive an email with a link to update the phone number Where does the transfer note show up to the transferred agent? When transferred, notes appear in the contact window and in the SR Notes in the research tool you use. Do I log in to my desk phone or Communicator? Log in to Communicator. How do I accept a call? The next phone call in the queue is pushed to you automatically. You don't need to push any buttons to answer or accept a call. How do I know it is a call back or an incoming call? Communicator indicates at the top of the contact window if the call is a web call back ("call me") or an incoming call Our newest "call me" experience allows you to hear the dial tone while the call is placed to the member </h2><h2>GUIDE.DETAILED_INFORMATION <style type="text/css">.auto-style1 { margin-left: 40px; } </style> Internal Information Select a topic below. Click on any of the links below for more information: <table border="0" cellpadding="2" cellspacing="2"> <tbody> <tr> <td>Install and Sign in / Sign out </td> <td> </td> <td>Snippets</td> </tr> <tr> <td>

Home screen</td> <td> </td> <td>Verification</td> </tr> <tr> <td>AUX codes </td> <td> </td> <td>Add or remove a Secondary Contact</td> </tr> <tr> <td>Actionbar</td> <td> </td> <td>SR Sub Status - SR closure reasons</td> </tr> <tr> <td>Recent Contact / Recontact Management</td> <td> </td> <td>Info Requested, Holds / Retrieve, and Pause SR</td> </tr> <tr> <td>Multi-interaction Communicator</td> <td> </td> <td>Email font, spell checker, translations and attachments</td> </tr> <tr> <td><a href="https://cskb.qa.ebay.com/cskbapp/art?page_content&id=GUIDE1540&ViewLocale=

en_US#tabbedchat">Chat</td> <td> </td> <td>Transfers</td> </tr> <tr> <td>My SR Notes</td> <td> </td> <td>Outbound calls and Outbound emails</td> </tr> <tr> <td>CSKB web interaction</td> <td> </td> <td>Technical Issues with Communicator</td> </tr> <tr> <td>Creating an Offline SR from an Online contact in Unify-AD</td> <td> </td> <td> </td> </tr> </tbody> </table>   Install and Sign in / Sign out Sign in - Communicator Before signing in, you will need to install Communicator. Click the link below to install the tool: https://csrtools/Communicator To sign in to Communicator: <ol> After opening Communicator, authenticate using your PIN and YubiKey. Enter your Admin Secure Access Control (ASAC) username and password in the login fields. <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/Images/1000%20-%203000/1540/Sign%20in%201.png" > Enter your phone extension as prompted on the second sign in screen. Note: The Skip option is only visible on the screen if you are working offline volume at your leadership team's request.   Select the checkmark icon to complete the sign-in process for Communicator. Update status from Prep Time to Available to receive customer interactions. Sign out - Communicator To sign out you have two options after completing your last interaction: <ol> Select End of Shift from the aux code status drop down list. OR Select About Me and select Sign Out. If the End of Shift aux code turns the status bar blue or you are experiencing a technical difficulty: <ul> Teammates can sign out using the steps found here Note: If you are fully logged out of the hard phone, Communicator will prompt you for your extension. If you remain logged in, Communicator will remember your extension. Home screen Navigating Home Home has the following menu options: <ul> My Work Items Performance System Status & Errors About Me Snippets Preferences Launch Agent Desktop My Work Items/Paused SRs Shows you all of your paused SRs. <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/Images/1000%20-%203000/1540/My%20Work%20Items.PNG"> Performance <ul> Your performance dashboard is now available <ul> Here, you can see your metrics for each interaction type: phone, email, and chat   Data updates after each interaction is closed/resolved <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/Images/1000%20-%203000/1540/Performance%20screen.png"> System Status & Errors <ul> Select the System Status & Errors icon in the menu to see potential Communicator technical issues You will be able to Copy to clipboard should you need to paste the error text in a MyIT report For more technical help with Communicator click here. <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/Images/1000%20-%203000/1540/System%20status%20%26%20errors.png"> About Me The about me page houses your name, site/geo site and what you are skilled into. <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/Images/1000%20-%203000/1540/About%20me.png"> Snippets This is where your snippets are located. You can learn more about how to use snippets in Communicator here . Preferences Within the Preferences window you can adjust your default locale for translation, and set up your greetings. <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/Images/1000%20-%203000/1540/Preferences.png"> Launch Agent Desktop Select the Launch Agent Desktop button on the bottom of the Home tab.
 <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/Images/1000%20-%203000/1540/Launch%20AD.PNG" > Aux Codes Status bar colors <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/Images/GUIDE/1501%20-%202000/GUIDE1540/Aug2017/GUIDE1540_Aug17_1.jpg"> The color of the bar running across Communicator changes based on your status, as defined below: Blue: Shows pending movement to a different status after you finish your current interaction.
 Red: Shown when in Lead, Lunch, Paid Break or Unpaid Break.
 Orange: Shown during Coaching, Coaching - Integrated, Meeting, Prep Time, Technical Issues, Training or Worker's Council.
 Green: Shown when available and either waiting for an interaction, or currently working on an interaction. Concurrent Chat note: If in concurrent chat (sometimes also referred to as

Push2) remember the following: <ul> As a scheduled segment approaches (i.e. Paid Break) to transition down to one chat This is done by going into the next aux code status as youre wrapping up one of two chats When you wrap up your last chat, the aux code status will automatically change to what was set Allows you to adhere better to your schedule <h4>Aux code definitions and tracking instructions</h4> Note: Aux codes may sometimes be referred to internally as "shrink states". For more detailed information about AUX codes please go to Standard operating procedures for customer service. Aux code Use this when... Additional information Available Spending time answering, documenting or researching for a customer. Includes all activities directly related to resolving the customer contact.
 Concierge Only: e2M Proactive Work and 48-hour fair warning calls can be done in this state. This allows conference calls to come through as needed. Break - Unpaid In-house use only
 NA: Should be used by teammates who have been approved to use by HR.
 UK: Unscheduled breaks not in Empower. NA: Teammates who have HR accommodations are the only ones who may use this task.
 UK: 5-10 minutes only, for toilet breaks and grabbing a drink from the kitchen area on your floor. Partners: All breaks except for lunch breaks. Also, any time spent on tasks that do not benefit eBay. Coaching 1:1 coaching with a TL or coach. A dedicated coach or TL has scheduled a coaching segment in your schedule.
 Not for side-by-side coaching or 1:1 performance reviews. Coaching - Integrated Side-by-side coaching only by either a TL or coach. A dedicated coach or TL instructs you to go into this status. End of Shift It is the end of your shift and you will not complete any additional work, such as before resolving the final contact at the end of your shift. When this is selected during a customer interaction, you will be placed in a blue pending status until the interaction is complete.
 Select the Resolve button on the wrap-up screen and you will automatically be signed out of Communicator and your research tool.
 If you are a closing teammate, remember to stay available until the end of the night to clear any contacts queued. Lead A teammate, SME, or team lead should only track Mentor - SME during time when he or she has been instructed to do floor walking and/or nesting support/SME for new hires or new product launches.
 Note: Not applicable for UK outsource. Floor walkers should always refer to the CSKB and address any identified training needs. It should also be used during the on-the-job training phase.
 UK: A team leader, SME, or support person should only use productive Aux code if they have been approved to work volume.
 NA: The Mentor - SME aux code is not used in NA.
 Concierge Only: Can be used for walk-up questions by the designated daily POC. In addition, any work that a TL, SME, or support person completes in Communicator should be done in this task. Lunch Taking your scheduled lunch break. Only use once in a regular shift as scheduled. Meeting A team leader has scheduled a segment for a meeting. This could include performance reviews, a 1:1 with your team leader, huddles and team meetings.
 eBay all-hands, roadshows, or similar company events. Do not use this status for coaching or training. Paid Break Taking a scheduled break. This is not intended for partner use. Use when going on breaks as identified in schedules. Prep Time Starting the shift before going available. This status is automatically selected when opening Communicator. Do not select manually at any other time. Proactive Scheduled for proactive segments by your leadership. Do not use for manual site search.
 Concierge Only: Can be used for tracking all outbound contacts including welcome calls, scheduled outbound calls, monitoring handle time calls, etc. In addition, preparation or research for the above outbound call type can be tracked here. Project Scheduled for Project segment(s) as requested by your leadership. This could include eBay-requested activities to improve processes, tools, or special tasks (e.g. workshops, pilot tasks, etc.).
 Use for personal development plans. UK: Also used for proactive manual search. Technical Issues If you are not technically capable of answering contacts because of errors in the system. When teammates cannot do productive tasks because of technical issues in Agent Desktop, Unify2 or any other eBay tool, which is indispensable for production. Remember to also inform your leadership of the issue immediately. Training Scheduled for training. This could include e-Learnings and classroom training. Workers Council NA, UK, AU and EEC: Do not use. Used only in-house for DE. Actionbar Icons The actionbar can be found at the bottom of the Communicator window and offers a lot of functionalities. <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/Images/1000%20-%203000/1540/phone%20icon.png"> allows you to place/remove hold <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/Images/1000%20-%203000/1540/Icon%20question.png"> provides access to expert help via chat or call <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/Images/1000%20-%203000/1540/Icon%20transfer.png"> transfer a contact <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/Images/1000%20-%203000/1540/icon%20conference.png"> initiates a conference call <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/Images/1000%20-%203000/1540/Icon%20new%20SR.png">Create a new activity or offline SR <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/Images/1000%20-%203000/1540/Icon%20SR%20menu.png"> <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/Images/1000%20-%203000/1540/Icon%20paperclip.png"> allows you to select chat highlights <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/Images/1000%20-%203000/1540/Icon%20research.png"> opens AD <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/Images/1000%20-%203000/1540/Icon%20expert%20chat.png"> opens Expert Chat <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/Images/1000%20-%203000/1540/Icon%20trash.png"> for pausing or canceling the SR <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/Images/1000%20-%203000/1540/Icon%20translate.png"> options for translation The red icons end the contact

Recent Contact / Recontact Management Overview <ul> Communicator can: <ul> Inform you when an incoming call may be a recent contact or possible recontact Show you the information you need early in the call   This way: <ul> You can more efficiently solve your customers request You can quickly access the customers contact history to guide your conversation You can more easily identify why is the customer calling The member doesn't need to repeat themselves   Where this is shown: <ul> Recent Contact identifier Recent SR view   Recent Contact flag <ul> When a customer contacts us within 10 days of their last contact, and within the same L1 CCR, Communicator will display the Recent Contact flag <ul> For this flag to appear, contact must initiate as any of these: inbound phone call, web call-back request, or inQueue call-back (note: web call-back and inQueue call-back are not available in FRITES) We want to focus on customer-initiated requests, where we can have a live interaction with the customer (and verify the possible recontact) We are capturing recent contacts using CCR L1 to align to the current definition eBay uses for recontacts (= within 10 days with same CCR L1) Teammates should use the contact flow shown below to determine if the recent contact is a recontact   This identifier will include: <ul> Contact reason Name of the teammate who worked the previous SR The day the previous SR was modified   Recent Contact call flow If the flag is displayed, always verify the Recontact or Recent Contact with the member. Check if this is actually a recontact before determining the best way to help the member This way we can: <ul> Reassure the member that we are aware of their recent history Reduce the amount of information that the member needs to repeat, saving time Be conscious that the member has already recontacted. We should do as much as we can to reduce any further recontacts for them

   Suggested script for these calls: (note: MSO, Concierge, and Motors Dealers support teammates arent required to acknowledge the Recent Contact or follow this script): <table border="1" cellpadding="2" cellspacing="0"> <tbody> <tr> <td>Opening script</td> <td> <Greet and verify as normal> My name is [Teammate Name]. I noticed you have contacted us recently, is that why youre contacting now? (Alternative)&nbsp;My name is [Teammate Name]. I can see you contacted us recently, are you calling about the same thing today? </td> </tr> <tr> <td>Member says yes&nbsp;</td> <td>Notes on previous SR:&nbsp; I have information about your last contact. Before we continue, allow me a moment to review so I can better assist you (Alternative) I can see that my colleague left some notes on the last call, bear with me while I review the notes <hr> &nbsp;No notes on previous SR:&nbsp; While I review the system here, can you provide me with a summary of why youre contacting now, or any updates since your last contact so I can better assist you? </td> </tr> <tr> <td>Member says no</td> <td> Ok. How can I help you today? </td> </tr> <tr> <td>Before the call ends</td> <td> Ensure the SR classification matches the member's concern(s). Reclassify the SR if necessary Do this while the contact is live (don't wait for ACW to reclassify) </td> </tr> </tbody> </table> Recent SR view <ul> If the Recent Contact flag is displayed, AD will: <ul> Automatically load the "recent SR view" with the last 30 days of SRs (50 SRs maximum). This&nbsp;"Recent SRs" view will load for all contacts, except if&nbsp;Guided Judgment or&nbsp;an e2M case is&nbsp;loaded, for SRs created within the past 30 days Expand the specific SR that caused the recontact (Recent Contact flag)   This view now: <ul> Displays the First Name / Last Name or Alias of the teammate who handled each of the SRs Shows the last communication ("source") in the summary card   <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/Images/GUIDE/1501%20-%202000/GUIDE1540/recontact%20management%201.jpg"> My SR Notes Automated saving <ul> Notes are automatically saved every 3-5 seconds Multi-Interaction Communicator Tab colors <table border="1" cellpadding="2" cellspacing="0"> <tbody> <tr> <td colspan="1"> </td> <td colspan="1">Home</td> <td colspan="1">Email</td> <td colspan="1">Phone</td> <td colspan="1">Live chat</td> <td colspan="1">Async chat</td> </tr> <tr> <td>Gray</td> <td>Tab is gray from the login screen until the Home tab has loaded. At this point the tab will turn blue. Home turns gray when another interaction loads and youre navigated to the new tab.</td> <td>When youve selected a different tab. This indicates that email is a lower priority than chat or phone.</td> <td>N/A</td> <td>Customer received a reply and is inactive.</td> <td>Customer received a reply and is inactive.</td> </tr> <tr> <td>Blue</td> <td>Active.</td> <td>Active.</td> <td>Active.</td> <td>Active, a response has been sent.</td> <td>Active, a response has been sent.</td> </tr> <tr> <td>Green</td> <td>N/A</td> <td>A new email has been assigned to you.
 The tab will remain green for 30 seconds, then turn blue provided you have selected that tab.</td> <td>A new phone call has been assigned to you. The tab will remain green for 30 seconds, then turn blue provided you have selected that tab.</td> <td>A new chat has been assigned to you. The tab will remain green for 30 seconds without a response from you, at which time it turns orange. When a new chat arrives and the tab is green, it turns blue if you respond to the customer and remain on the tab. The green color applies for new responses from the customer as well.</td> <td>A new chat has been assigned to you. The tab will remain green for 30 seconds without a response from you, at which time it turns orange. When a new chat arrives and the tab is green, it turns blue if you respond to the customer and remain on the tab.</td> </tr> <tr> <td>Orange</td> <td>N/A</td> <td>N/A</td> <td>N/A</td> <td>It has been more than 30 seconds since the new chat was assigned, or since the customer provided a new response, and you have not yet responded to the customer.</td> <td>It has been more than 30 seconds since the new chat was assigned, or since the customer provided a new response, and you have not yet responded to the customer.</td> </tr> <tr> <td>Red</td> <td>Error (password related)</td> <td>N/A</td> <td> Customer is on hold. Customer is not on hold but you have selected the Home tab or another interaction such as email. Phone is the highest priority and will remain a red color until you select it. </td> <td>It has been 2 minutes since a new chat was assigned to you or since the customer replied and you have not yet responded.</td> <td>It has been 2 minutes since a new chat was assigned to you or since the customer replied and you have not yet responded.</td> </tr> <tr> <td>Black</td> <td>N/A</td> <td>N/A</td> <td>Chat was ended by either the customer or teammate.</td> <td>Chat was ended by either the customer or teammate.</td> <td>Chat was ended by the customer.</td> </tr> </tbody> </table> Phone interaction Active phone interaction <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/Images/1000%20-%203000/1540/Active%20phone%20interaction.png"> Phone ACW toggle <ul> You will need to select the toggle for After Contact Work if ACW is required <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/Images/1000%20-%203000/1540/ACW%20toggle%20for%20phones.png"> If you forget to select it or there's a disconnect: <ul> A pop-up appears and you'll have a few seconds to select if you need ACW Follow the Disconnect handling policy for any disconnected contacts   If you select No or don't select anything, your notes will automatically save and the service request will close as resolved If you call back and don't reach the customer, or when a call is shorter than 20 seconds you will need to select Unreachable or Resolved <ul> If you reached the customer and they no longer require assistance, select Resolved If the call is longer than 20 seconds, and you didn't use the ACW toggle, you will receive the pop-up to determine if ACW is required   See the ACW FSP for when to use ACW. Secondary tab Phone - expert chat <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/Images/1000%20-%203000/1540/Phone%20expert%20chat.png"> Chat - expert chat <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/Images/1000%20-%203000/1540/Chat%20with%20expert%20chat.png"> Chat with phone activity <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/Images/1000%20-%203000/1540/Chat%20with%20phone.png"> Chat Multiple chat screen <ul> Once you have logged into Communicator and select Available, your first chat should be pushed to you Additional chats will be pushed to you, signified by another tab at the top of Communicator <ul> Push settings will be set based on staff group <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/Images/1000%20-%203000/1540/Tabbed%20chat%20UI.png">   Guided Judgment and Workbench will be available in the tool <ul> You will only need to use these tools as your chats direct you to do so Open AD as needed   Tabbed chat navigation Left hand navigation: There are collapsible rails for each section and the 3 dots in the middle allow you to alter the window size: <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/Images/1000%20-%203000/1540/Left%20hand%20navigation.png"> The actionbar can be found at the bottom of the chat window.
 <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/Images/GUIDE/1501%20-%202000/1740/Bottom%20toolbar.PNG"> Content <ul> You can browse for content to help you help the customer&nbsp; Add favorite content by selecting&nbsp;the blue heart icon <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/Images/1000%20-%203000/1540/4%20-%20KB%20article%20search%20and%20favorite.png"> Chat snippets can be saved, created and used on any chat <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/Images/1000%20-%203000/1540/6%20-%20Snippets%20(maximized).png"> You can close out of the chat content by using the gray X in the Chat Content window Chat ACW toggle <ul> Idle time in the system lasts a maximum 5 minutes and will automatically close the chat at that threshold <ul> See the&nbsp;Chat SOP article&nbsp;for specific guidelines on managing customer idle time   Once the idle chat reaches the 5 minute threshold, it will automatically disconnect and your experience will depend on if youve Opted-In to ACW or not: <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/Images/1000%20-%203000/1540/ACW%20toggle%20for%20chat.PNG"> ACW Opt-In is YES <ul> When the idle threshold is reached: <ul> ACW will start counting once the chat has ended   ACW Opt-In is NO <ul> When the idle threshold is reached: <ul> You will receive a timed pop-up asking if After Contact Work is required You can select YES or NO if ACW is required <ul> If YES is selected, ACW will start counting If NO is selected, the chat SR will automatically close as resolved   Chat highlights This feature is a great way to mark or highlight any responses (from either the customer or you) in the chat to readily recall important information and quickly take notes. You can have up to 5 Chat Highlights marked at a given time per chat. Use Chat Highlights to: <ul> Remember the customers issue throughout the duration of the chat Remember the resolution offered, actions taken, or decisions made during the chat Keep track of follow-ups or promises made to the customer during the chat Toggling the Chat Highlights box on and off: <ol> Select the paperclip icon in the actionbar at the bottom of the chat window to open the Chat Highlights box. Select the X to the right of the Chat Highlights text at the top of the window. <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/Images/1000%20-%203000/1540/Chat%20highlights%20window.png">   To mark a response as a highlight: <ol> Select the star icon in the message bubble. The star icon fills in solid blue. You can mark up to 5 individual responses in one chat session as highlights. <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/Images/1000%20-%203000/1540/Mark%20chat%20highlight.png">   When you select a highlight it will open the Chat Highlights box This allows you to reference important information quickly You will no longer need to take notes outside of communicator or scroll through the conversation You can deselect a previous highlight be selecting the red (-) in the box Selecting a highlight in the Chat Highlights box will take you to the original message and border it in blue <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/Images/1000%20-%203000/1540/Chat%20highlight%20select.png">   How to end a chat <ol> Hover your mouse over the icon image below within Communicator&nbsp;to see the&nbsp;End Chat&nbsp;tooltip. <img alt=""

src="https://cskb.qa.ebay.com/library/EBAY/Images/1000%20-%203000/1540/End%20chat.PNG"> Select and hold the End Chat button to end the chat. End chat window: <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/Images/1000%20-%203000/1540/8%20-%20Chat%20wrap%20up%20screen.png"> CSKB web integration The CSKB in Communicator <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/Images/1000%20-%203000/1540/CSKB.png"> Snippets What are Snippets? Snippets are similar to macros, which allow you to type a shortcut (##) followed by a keyword which will automatically load a saved template. Magic Tokens can be used with Snippets, which automatically load the following details: <ul> Member's first name Member's last name Request site SR number Today's date Tomorrow's date Username The following is an example of a Snippet for a greeting: <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/Images/1000%20-%203000/1540/snippet_04.png"> When you activate this snippet by typing the short key, the system will automatically load the members first name from the SR details so that you dont need to manually copy the first name of the member. This is an example of the result: "I hope you're doing fine today, Sutapa." How do I create a Snippet? DE specific: Only snippets approved by eBay may be deposited. Teammates are welcome to contact their team leaders with suggestions and requests regarding new snippets. Everywhere else: <ol> Log in to Communicator. From the Home menu select the Snippets icon. You don't need to have a live email or chat chat interaction open to create or edit snippets If you have a live email or chat interaction you can also edit snippets   Click on the Snippets icon to see snippets across channels <ul> You can select either the email or chat icon to view snippets for each channel   Select which channel you want to create the snippet for by clicking the email and chat icons <ul> Snippets can be created for just email, just chat, or for both (these are common snippets) If neither icon is selected, you won't be able to save the snippet <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/Images/1000%20-%203000/1540/Snippets.png"> Select the + plus symbol to create a new snippet. Write the short key and snippet text. Select magic token from Add Magic Token dropdown list. Select Save to save the snippet. Activate the snippet in a chat or email window by typing its short key. Make sure that you don't have a similar command in Macro Express to avoid duplicate texts.   To edit existing snippets click on the pencil icon on the right hand side. From here you can edit the snippet short key, text and magic tokens. There is also a delete button if you wish to completely remove the snippet <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/Images/1000%20-%203000/1540/Edit%20snippet.png" >   You can view, create and edit snippets from a live email or chat interaction window. This is located on the right hand side of screen By default, not all snippets are displayed <ul> Select Snippets to display all of them   Once all snippets are displayed, the same create and edit functionality can be used. You are unable to create chat snippets from an email interaction and vice versa   Note: You can have up to 100 snippets of 256 characters each. Verification Verified Call To complete the verification process for a customer who shows as Pin Verified, click the verification icon. When a call comes in Pin Verified, the verification status is Contact not verified. This means you still need to confirm the customers identity. After verifying the customer and clicking Submit, the customer will show as verified. Unverified Call <ol> The verification window should open automatically when you receive a call. If it does not, click the verification icon   On the side of the call window, you will be able to search for the account. This is the process for an unverified customer who likely did not use Help Hub to reach us   On this screen, enter the customers information Use the magnifying glass icon to search for the customer if the customers information is not already displayed <ul> You can search by email address, phone number, or customer username The sunglasses icon at the bottom of the verification window takes you to the CSKB article about verification Standard unverified example:
 <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/Images/1000%20-%203000/1540/Unverified.png">
      Multiple search results could be displayed as you search for the customer in Communicator <ul> After identifying the correct contact, select it and Submit <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/Images/1000%20-%203000/1540/unverifiedCall_afterIdentifyingTheCorrectContact.png">   Next, verify one of the following: <ul> Primary Phone Number and Zip Code Registered Address Date of Birth <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/Images/1000%20-%203000/1540/unverifiedCall_dateOfBirth.png">   After verifying one of the items, select the item you verified Select Submit. The submit button will update the verification icon as shown and you will have completed the verification process. <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/Images/1000%20-%203000/1540/unverifiedCall_theSubmitButtonWillUpdate.png">   Able to identify, no eBay account <ul> If you can identify the person you are talking to by email address and they don't have an eBay account: <ul> Create a new outbound email with the person's email address   This allows us to ensure that outbound emails are sent to the person we intend to receive them (e.g. for any follow up emails) Unable to identify an account <ul> Use noname@ebay.com in the username field if: <ul> You can't identify the person / eBay account When the customer doesn't want to provide contact information as they are not a registered member Examples include: <ul> Report of purchase outside eBay, where customer does not have an eBay account setup Potential spoof or spam email which person is questioning, as they do not have an eBay account   noname@ebay.com allows teammates to document SRs from unidentified parties Once a customer has disconnected, you can't change the User ID field <ul> You'll need to close the SR as appropriate, with noname@ebay.com   Unable to verify the customer <ul> If you can identify the person youre talking to and they do have an eBay account: <ul> Associate the appropriate eBay username to the SR, even if you are unable to contact verify   This allows us to document any calls under the appropriate username Do not use usernames such as "anonymous" or "unknown" in place of noname@ebay.com Hard Verification Hard verification is required in certain situations. See when you should hard verify a contact. Select the verification icon if you need to complete hard verification. <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/Images/1000%20-%203000/1540/hardVerification_selectTheVerificationIcon.png"> Complete one of the verification options with the customer: <ul> SMS or text message Previously used email address Manually call the customer   Select the item that you verified to let Communicator know which piece of information you verified. Select Submit. If you need to add a secondary contact: <ul> Select the dots on Submit   <img alt=""

src="https://cskb.qa.ebay.com/library/EBAY/Images/1000%20-%203000/1540/hardVerification_selectTheDotsOnSubmit.png"> After completing Hard Verification, the verification icon will update to the padlock icon. <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/Images/1000%20-%203000/1540/hardVerification_afterCompletingHardVerification.png">   Add or remove a Secondary Contact Add Secondary Contact - all channels <ol> To add a secondary contact, click the Hard Verification icon <ul> You must always complete hard verification before adding a secondary contact <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/Images/1000%20-%203000/1540/addSecondaryContact_youMustAlwaysComplete.png">   Now you can enter in the secondary contact's information. Select Submit. Remove Secondary Contact - all channels You can remove Secondary Contact information by following the steps found here. SR Sub Status - SR closure reasons See the Service Request closure Fundamental Service Policy. Info Requested, Holds / Retrieve, and Pause SR Info Requested <ul> At the bottom of all email windows is a toggle button for Info Requested This button should only be turned on when you are emailing the customer asking them to respond back with information When this button is turned on and the customer responds back to your email, it will be routed directly to you for 30 minutes. If you are not able to work the response in 30 minutes, it will be routed to the queue to be worked.

Note: This feature is not to be used to simulate case ownership. This is because in reporting, the SR will show as if it were paused. NA specific: do not use AU specific: This feature is not available DE specific: Do not use <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/Images/GUIDE/1501%20-%202000/GUIDE1540/Aug2017/GUIDE1540_Aug17_16.jpg"> Holds / Retrieve The hold feature is used to place alive interaction on hold for a variety of reasons. The customer will be placed on hold while the teammate does further research. Guidelines <ul> Place the customer on hold for up to two minutes Check back with the customer before the two minute mark has passed Obtain customer approval for additional hold time For hold procedures see: <ul> Escalation and customer experience guidelines for phone contacts Chat standard operating procedures for chat   There are two indicators for holds: <ul> The hold button changes the call window to indicate the amount of time on hold Select the End icon on this indicator to retrieve the customer A pop-up indicator (similar to the email desktop alerts in Outlook) will display on the desktop if the hold time reaches one minute and 50 seconds <ul> The indicator appears in the bottom right corner and fades away   The indicators for wrap-up time follow the same design Tool Procedure Follow these steps when you need to place a customer on hold: <ol> Select&nbsp;Hold (located in the lower left-hand corner of the Inbound Call window). <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/Images/1000%20-%203000/1540/Large%20hold%20bu tton.png"> The time will continue to go up as you have the customer on hold. Note: This window pops up as you approach two minutes of hold time. <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/Images/1000%20-%203000/1540/Two%20minute%20hold.png"> Click End to take the customer off of hold. Pause SR Pause interactions are used when additional assistance / approvals / information from a 3rd party is needed. SOP should be followed on when to use and notes should be left as per SOP in your market. You have a limit of 30 paused interactions. If you reach 25 paused interactions, you will see an alert message If you reach 30 paused interactions, you will no longer be able to pause additional SRs The maximum time you can pause an SR is seven days Exception: When proof is needed for an eMBG case and a hold is placed on the case, the SR should be closed as Resolved (i.e. eMBG cases will generally not be paused). Pause work Update status to Available to receive a customer interaction.

 Determine if the interaction must be paused and that you will take action to resolve the member's concern later on.

 Refer to the following tool processes, as appropriate: <ul> Pause phone Pause chat Pause email Pause phone <ol> You will need to opt in to ACW while the contact is live or after the phone interaction. In the ACW window, click the three dots, then select&nbsp;Pause SR. <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/Images/1000%20-%203000/1540/Pause%20SR.png">

 Refer to the following tool process: <ul> Resume Pause chat DE specific: Not applicable for DE since chat is not in the channel mix. After completing the chat interaction, you will be placed into ACW. In the ACW window select the trash drop down menu. Select Pause SR. Refer to the following tool process: <ul> Resume Pause email <ol> After completing the email interaction, select the drop-down next to the button that looks like a trash can. Select Pause SR from the list and not one of the "no reply" options. Refer to the following tool process: <ul> Resume Resume <ol> Select My Work Items from the Home screen in Communicator. To resume an interaction select the phone or email icons. To close a paused SR without any further action, click on the trash can. The SR will be closed immediately.   <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/Images/1000%20-%203000/1540/My%20work%20items%20pause%20SR.png"> When a work item is selected, it will load in a panel where you can save or update it. View paused interactions <ul> As a teammate, you own the paused interaction until you resume and either cancel, disposition, or resolve the SR You can view all of your paused interactions in My Work Items within Communicator Team leaders will use the System Health Check Dashboard view:

e2M Link Buy/Sell Link M2M Link   If the SR cannot be actioned due to system limitations, teammates should open a new SR to follow up with the member If an SR is put in a Paused Status, we should always follow up with the member Team Leaders should do a daily sweep of In Progress Paused SRs (using the System Health Check Dashboard) and work with teammates to resolve any outstanding concerns to ensure our members received the promised follow up Customer follow ups <ul> A customer follow up is an activity which has been requested by the member or is required to complete a given task Follow ups should be completed during your allocated ACW time If you cannot close the request in the ACW, please pause the SR using the Paused SR SOP Keep in mind the following standards: <ul> Always make the member aware that there may be a delay Specify the approximate time that the follow up will be completed with the customer Review Open SRs daily to ensure we're complying with the expectations we set with the customer The maximum time you can pause an SR is seven days Note: Although there are follow ups scenarios, there are a limited number of scenarios where contacts should be placed in a paused setting to complete the follow up later. Pausing the contact is not the standard, it is only to be used in exceptions If the scenario is not on the exception list below, then the teammate should get approval from a team leader or manager For member-to-team leader escalations, follow the escalation and customer experience guidelines eBay to Member (e2M) Buy/Sell, New Joiner, High Value and/or Occassional Member to Member (M2M) Process and pause exceptions list: See Pause service request SOP Email font, spell checker, translations and attachments Font Always ensure the font, size and colour of text in your email reply is consistent throughout:
 1. Highlight all text in the email body
 2. Select the Clear Formatting option (eraser symbol): <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/Images/1000%20-%203000/1540/Clearformatting.JPG" > Inline spell and grammar checker You can change the language of the spell checker at any time, by selecting the flag symbol: <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/Images/1000%20-%203000/1540/Inline%20translator.png"> There are three ways to enable spell check for chat and email: DE specific: chat is not applicable for DE <ol> Global settings: Spell check is enabled by default. Spell check toggle as you type: This enables word redlining when drafting an email. <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/Images/1000%20-%203000/1540/enableSpellCheck_spellCheckToggle.png">
 Spell check: This provides you an all-encompassing view of each spelling error in your email and allows you to change them all at once.
 <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/Images/1000%20-%203000/1540/spell%20check%201.jpg"> Translate and respond to an inbound email or chat <ol> Select the Translate button at the bottom of the email window. Select All to translate the entire email Pick Selected to translate the portion you highlighted <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/Images/1000%20-%203000/1540/Translate%20button %20large.png"> Once the translation is done, you should be able to see the original inbound emails language in the outgoing email section in green text (Spanish, in this example): Responding to the translated email: After drafting the email in your language: <ol> Click on the small arrow icon within the Send button Select Send and Preview to open another window with the header, email content (both translated and original), and footers If you don't see the translated content: <ol> Open Microsoft Word. Make sure you are logged into Microsoft 365 with your credentials before copying and pasting content. Verify that your name and ebay credentials are in the upper right corner of the Word document <ul> @ebay.com, @tpa.ebay.com, etc.   Both online and desktop versions of MS Word can be used This tool must be used within Citrix only <ul> Never copy, paste or save any information outside of the Citrix environment   If you are unable to see your credentials. Inform your team leader immediately Only use Communicator's translation function   Translate the content within Microsoft Word.   Add the translated email before the original email draft. Make sure the format is correct before sending the email. If the preview email seems correct, click Send on the preview window. After you send your response the customer will see both the original email and the translated version. A message about the email message being machine translated will also be displayed   Note: there is currently an issue with translating emails to Italian, German, Polish, and French. We are working to resolve this issue. Translate outbound email Outbound emails can also be translated: <ol> Type your response in your language and then. Select Translate in the email response section. Select which language you would like the email response to be translated into. <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/Images/GUIDE/1501%20-%202000/GUIDE1540/Aug2017/GUIDE1540_Aug17_27.jpg">   Note:&nbsp; All languages are available even if the flag next to the language is not displayed To determine which language should be selected on outbound emails, use the members registration site <ul> Example: for a member registered on the France site use French   Add an attachment to an SR <ol> In the SR under the SUBJECT line, click the plus icon (+) next to the paperclip symbol. <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/Images/1000%20-%203000/1540/addAnAttachmentToAnSR.png"> Locate the file that you want to attach. Click on the file and upload it to the SR. The trash icon can be used to delete an attachment if selected accidentally   File attachments cannot be seen in eBay Messages, but are only accessible through the email address on file. Note: You can add up to 5 attachments to an email in Communicator. If you need to add more than 5 attachments: <ol> You can do so by copying these into a Word document. Upload the Word file. When you attach a Word document, your real name or Genesys alias will appear. To change the user name in Word to eBay Customer service, please follow these steps: <ol> In Word, under the File Menu, open Options. Under General > Personalize your copy of Microsoft Office, replace your User Name with "eBay Customer Service" and remove any initials. Click OK. Transfers Overview <ul> There are multiple ways to transfer a contact Review the call transfer guide to confirm the transfer is needed It is easiest to transfer contacts to the same channel (chat to chat, email to email, and phone to phone) Some queues offer different channels than others This makes it harder to transfer through the same window   Always transfer chat or phone SRs to the relevant chat or phone queue available If the next team does not work chat or phone, then transfer the SR offline <ul> Use the appropriate tab above for the channel youre communicating through   Email transfer procedure <ol> Click&nbsp;Transfer, located at the bottom of the window. Note: Transfer an email to another team if your team does not handle the member's concern <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/Images/1000%20-%203000/1540/Icon%20transfer.png" > Select the correct classification for where the email should be directed. Click&nbsp;Route. Creating an offline SR If you identify that an offline SR will need to be used to resolve the contact: <ol> Select + Create Activity / SR <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/Images/1000%20-%203000/1540/Icon%20new%20SR.

png"> Choose New Offline SR. Choose appropriate CCR classifications. See GUIDE1453 for transfer and classification guidelines Note: Logistics is found under Specialty   Select Create to connect the contact to the appropriate team. Chat transfer procedure Note: Always transfer chat or phone SRs to the relevant chat or phone queue. If the next team does not work chat or phone, transfer the SR offline. Update your status to Available to receive a customer interaction. If a transfer is needed, inform the customer of the transfer and set expectations. Obtain customer agreement prior to transferring. Select the Transfer arrow. <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/Images/1000%20-%203000/1540/Icon%20transfer.png" > Update CCR classification Levels 1 and 2. Select the Transfer button. The transfer shows as complete on your Communicator screen. To transfer a chat to an email queue: <ul> Don't transfer chat or phone SRs offline if the transfer screen shows the target queue is available for chat or phone. Always transfer chat or phone SRs to the relevant chat or phone queue. If the next team does not work chat or phone at all, transfer the SR offline   There are two ways to send an offline SR from a chat window: <ul> The simplest way is to complete the chat with the member using the snippets provided <ol> Once the chat has ended and the member has disconnected add any applicable notes. Select the menu next to Resolve using the three dots. Select Pause SR. Resume the SR by clicking on the envelope icon in the Communicator home screen. The SR will now be an offline SR in email form. You can now transfer to the appropriate queue. Use the email tab above for help transferring the email.   If the customer has more than one concern: <ol> Let them know you're sending a request to the appropriate team. They should expect a response over email within 48 hours   Select + to add/create a new activity. The offline SR creator pops up and you can select the appropriate queue. Add the appropriate template from the SOP's <ul> This provides the next teammate with the information needed to resolve the customer's concern   Select Create to send the SR to the selected queue. Continue chatting in the original window about any other concerns the customer has. Chat escalation DE specific: Not applicable since chat is not a channel offering. Select Transfer, Note then Team Leader. Select the leader you would like to escalate the chat to. The leader you selected will receive the chat. Escalating to a Team Leader/Coach for a live transfer <ol> After validating a call, it must be escalated to a team leader/coach as per escalation guidelines. Place the member on hold to review/consult with an available Team Leader/Coach. The leader taking the escalation will need to be in available status to receive the phone call interaction   Select the transfer arrow icon. Enter the escalation notes in the note section. Under Team Leader click on Select Team Lead. Select the appropriate leader from the list on the right. Select Transfer to team lead&nbsp;to continue. <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/Images/1000%20-%203000/1540/Transfer%20to%20team%20lead.png"> Transferring a PHONE/CHAT contact as an offline SR to an offline team <ol> Explain to the customer that you are investigating the issue. Ensure that the ACW toggle is set to YES. After you have completed assisting the member and the chat session ends, you will be placed into ACW. In ACW, select the "3 dots" at the bottom of the window. Select Send to offline. Leave a note for your colleagues. Classify SR > Enter Notes > Route <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/Images/GUIDE/1501%20-%202000/GUIDE1540/GUIDE1540%20transferring%20to%20offline%202.jpg"> Transferring to a different region / language All transfers to different regions should be cold transfers. Follow these steps when you need to transfer to a different region: <ol> To initiate the cold transfer, click the&nbsp;Transfer&nbsp;arrow in the call window. You can update CCR values during the transfer process so you don't have to update it on this screen..   Select the correct Request Site (or "region"). Select the correct queue, enter your note, and click&nbsp;to Transfer. Steps to transfer to a different language (Spanish) This is for NA teammates only. If the customer requests support in any other language (French, Russian, German, etc): <ul> Inform them that we do not currently offer support in their requested language. Offer to support them in English For all Spanish phone transfers for North America, you should always try first to warm transfer If the warm&nbsp;transfer is taking more than 30 seconds: <ul> Cancel warm transfer Inform the member that there is no Spanish speaking teammate currently available Offer customer the option to be transferred to the queue and inform them there might be waiting time <ul> If the customer is willing to wait to get support in Spanish, initiate a Cold transfer If the customer is not willing to wait, proceed with assisting customer in English   The warm transfer process described below is applicable only when transferring to a different language (ES, Spanish phone support for North America) Spanish is currently the only different language supported by NA teammates   For standard cold and warm transfers, see the corresponding section (separate tab in this section) For more information about transferring Spanish contacts, filter to Spanish in the Transfer Guide Warm and cold transfers Warm transfer definition and benefits: <ul> A warm transfer means you stay on the line as the next teammate takes over the call This allows you to briefly outline the customer's concern and what steps have been taken By handing over in person, you are providing a better experience for the customer You also enable a quicker resolution for your colleague DE specific: <ul> Only do a warm transfer A cold transfer will only be used if approval has been given in KB1918 or if the customer insists If the customer cannot be reached within 2 minutes: <ul> Arrange a Call Me through Help Hub.   See the warm transfer document Warm transfer versus cold transfer guideline <ul> Only transfer if necessary If there are some issues you can resolve, handle those before transferring Always use warm phone transfers if available to your team/department Ensure the customer is verified before you begin the warm transfer process <ul> Always verify the customer if they were not verified at the start of the call   Double-check with your team leader if you are unsure about the availability of warm phone transfers for your team If you need to escalate the contact to a TL, see this process instead Follow these steps to perform a warm transfer: <ol> Confirm that there are no other questions that you can resolve before you transfer the call. Before you start the transfer, inform the customer that you are going to consult with a different team. Obtain the customer's agreement to initiate the transfer.

Initiate consultation with teammate 2 (see detailed steps below). Complete warm transfer to teammate 2 (see detailed steps below).   Note: we have summarized the Warm Transfer process here (PDF file). See detailed steps below. Consultation <ol> Select the&nbsp;Consultation/Conference&nbsp;icon. <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/Images/1000%20-%203000/1540/icon%20conference.png"> Select correct CCR SR Classification based on your research&nbsp;of the&nbsp;Transfer Guide. Notice that: <ul> The queue "estimated wait time" (EWT) appears on screen <ul> EWT&nbsp;is for contacts that are not prioritised. Most queues prioritise&nbsp;transfers, so you can expect the&nbsp;wait time to be less than&nbsp;indicated (less than 2 minutes in most cases)   Selected classification turns green "Connect" button lights up and turns blue   Enter your notes for teammate 2 (example: item number, reported user IDs, etc). Inform the customer you are putting them on hold. Advise of waiting time if &gt;1min. Select Connect. You may take the member off hold by clicking on the hold button. If you do it, the call will show as "Active" and will highlight in green You will NOT lose your place in the queue by doing this Your call for teammate 2 will be placed on hold When teammate 2 becomes available, they will be on hold and will know you are talking to the customer   Once teammate 2 answers, you can discuss the customer's issue while the customer is on hold. Follow usual hold SOP - check in with customer during long waits   Provide teammate 2 with the following information: <ul> Customer's name Validate that customer has been verified Customer's concern and reason for potential transfer   After consulting with teammate 2, complete the warm transfer. See SOP below Teammate 2 must accept the transfer If there is any push back from teammate 2, then teammate 1 can use the following statement: For the best customer experience and in line with the warm transfer SOP I am going to hand the member over to you <ul> Exceptions: <ul> If during the consultation it is clear to both teammate 1 and 2 that the contact should be transferred to a different department, teammate 1 should end the consultation and start a new consultation with the correct department If the correct department is not clear to teammate 1, teammate 1 should review the Transfer Guide with their leader to determine the correct department   Warm transfer SOP <ol> Select merge call <ul> This brings the customer on the line with both of you   When the conference is active, both calls will highlight in green. Teammates can see each other's names. Teammate 1: introduce teammate 2, then click the transfer arrow. Complete ACW if you opted in before the transfer. Teammate 2: resolve and document the SR with the customer as normal. Warm transfer: During closed hours of operation <ol> Confirm that the team where the customer must be transferred to is currently closed. Unavailable teams appear in gray   Inform the customer that the team is closed. Assist with general inquiries. Provide hours of operation to call back when the team is available. Warm transfer: Transferring to a Team Leader (escalating to a supervisor) Select the conference icon and toggle to Team Lead. <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/Images/1000%20-%203000/1540/warmTransfer_conferenceIcon.png"> Then Select Team Lead to load the list on the right. Select the name of the leader from the list. The leader must be in available status to receive the escalated call transfer <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/Images/1000%20-%203000/1540/warmTransfer_selectTeamLead.png">   Paste the appropriate escalation notes into the note section. Select Connect. Talk to the leader to explain the issue. Select the Merge icon. <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/Images/GUIDE/1501%20-%202000/GUIDE1540/Warm%20transfers%20(Mar2018)/Merge%20icon.png"> Introduce the team leader to the member. <li id="warmcallback">Click the Transfer arrow. <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/Images/GUIDE/1501%20-%202000/GUIDE1540/Warm%20transfers%20(Mar2018)/transfer%20icon.png">   Warm transfer: options to arrange call-backs Varies by Teammate location. Check with your leadership to ensure you use the right option for your team/location: <ul> Arrange for the appropriate department to call member back (Escalate to Team Leader to arrange this, if applicable) Inform the customer of the "Have us call you" option <ul> Including&nbsp;which topic would get them to the right team   If the queue was closed previously: <ul> Place a call to the customer when the appropriate queue is open Warm transfer at that time   Cold transfer to PayPal: Tool procedure (legacy flow) DE specific: not applicable. From March 2019: teammates should not transfer members to PayPal <ul> Direct member&nbsp;to contact PayPal Customer Service instead   Cold transfer: During closed hours of operation DE specific: not applicable. Verify that the team is currently closed. Unavailable teams appear in gray   Inform the customer that the team is closed. Assist with general inquiries. Provide hours of operations to call back when the team is available. Outbound calls and Outbound emails Outbound call from Available status <ul> Whenever you need to make an outbound call to a customer, be sure you are dialing the correct number One number out of place means we are reaching the wrong person Also please be aware and do not dial any emergency numbers (e.g. US has 911, UK has 112 & 999) If you have an emergency please reach out to your leadership for the correct procedures   Select the phone icon to open the dial pad. When the dial pad appears, you can dial by any of these three methods: <ul> Click the numbers with your mouse to input the phone number. Type the number with your keyboard. Paste the number from the clipboard.   If you need to dial another country, use the dropdown to choose the right country before dialing. Select the blue Call Button at the bottom of the dial pad. Make sure the phone number is complete and the correct country is selected   Outbound call from ended call (previous call or disconnect) Need to call back the same member? Next to your ACW (After Call Work) timer, select the three dots beside Resolve, and choose Call-Back/Redial. The customer's phone number will be in the dialer for you already, and you can place the call. Need to call back a different member? Place a new call using the phone icon at the bottom of the Communicator home screen. When to make an outbound call For guidance on when you should make an outbound call, please refer to the Outbound Calls guide. AU specific: Not applicable. Seek guidance from your leader instead. Outbound emails Option 1: creating an outbound email without a live contact

 Select the envelope icon on the bottom of the Communicator home page. Note: When you are in a non-productive state (break or lunch), and you initiate an outbound email or phone call, Communicator puts you back into Available: Search for the customer by their username or by entering their registered email address: Click Create to start composing the email to the member. Remember to use spell check when composing emails   Compose your email to the member. When finished, click Send. Option 2: creating an outbound email during a live contact <ol> On the bottom of Communicator select the + plus sign. <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/Images/1000%20-%203000/1540/Icon%20new%20SR.png"> Click New Email Activity. An email window will open allowing you to draft an email. Use spell check when composing emails it will route you to the page where you can create the email.   How to use templates <ol> Search for templates (solutions) or use the favorites you have previously added. Select the SOL ID to view the template. If you want to use the whole selected template you select Add" to add it to your Outbound email:

 <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/Images/1000%20-%203000/1540/GUIDE1540_Outbound_templates2.jpg">
   If you would like to only use a piece of this template, you can highlight the section you need, and select Add highlighted:

 <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/Images/1000%20-%203000/1540/GUIDE1540_Outbound_templates3.jpg">
    Technical Issues with Communicator The tool crashes during an interaction <ul> Exit Communicator During an interaction, the call will not be lost. During an email or chat interaction, you have three minutes to log in to

Communicator again to retrieve the interaction. After three minutes, the interaction will be routed to another teammate. If you were drafting a reply to a customer, the draft may have been saved automatically. There is an automatic save feature.   If re-routing occurs, new ownership will occur with the teammate who receives the interaction. This will not be a new SR, just a change to the new teammate, once they receive it.   Tool won't let you sign out <ol> Press Ctrl + Alt + Delete on your desktop keyboard to access windows options. Select Start Task Manager option. Locate and select Communicator on the Process tab. Select the End Task button. <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/Images/1000%20-%203000/1540/toolCrashesDuringAnInteraction_endTaskButton_1.png"> <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/Images/1000%20-%203000/1540/toolCrashesDuringAnInteraction_endTaskButton_2.png">   Refer to the Install and Sign in / Sign out subsection above for instructions about signing in to Communicator. Communicator will not run / open <ul> The issue is that Traffic Security Agent has malfunctioned and the yubikey prompt for the tools is not appearing You will need to end the Traffic Security Agent processes and then retry This can be done following the below steps: <ol> Open Communicator and verify the tool is not opening Check the system tray for the traffic security agent and note if there is a red line through it If so, open task manager (Ctrl + Shift + Esc) In processes look for: eBay.CsTech.Assistant.BlackBox.exe eBay.CsTech.TrafficSecurityAgent.exe Right click each one and select End process tree Once completed, click on Communicator again and the Yubikey window will appear Communicator will now load   Unable to login - Error 1140 <ul> Error 1140 is linked with the phone's headset button Please ensure the button is ON, prior to logging into communicator Please complete the following steps: <ol> Close your communicator instance Reboot your physical phone Switch ON head-set button Login to Communicator (try twice if first attempt fails)   Channel Services error <ul> Generally this is not a work stoppage issue If you restart Communicator, it may go away The Channel Services keeps you from having multiple Communicator sessions open at the same time With multiple sessions, you may see two contacts delivered at the same time If it persists, you can report it via eWatch&nbsp;ticket How to get log files for eWatch eWatch requires this file for troubleshooting (please attach it to the eWatch&nbsp;ticket). For In-House teams: <ol> Go to the Start Menu Run/Search Type %localappdata%\CSTech Hit enter/search (take out the space after the percent sign) The folder should open automatically. If not you can: <ul> Browse to: C:\Users\(YourNTUsername)\AppData\Local\cstech.&nbsp;Take all the files in that folder, zip them, and then attach them to the eWatch&nbsp;ticket   For our Partners: <ul> There's a desktop icon. Just click on "Upload Logs - Communicator" with the little Star Trek Communicator Icon Creating an Offline SR from an Online contact in Unify-AD
 The tool crashes during an interaction If you use Unify-AD, refer to the following sections of this article: <ul> Creating an Offline SR in Unify-AD for logistics Creating an Offline SR in Unify-AD for other teams (not logistics) If you use Unify-Siebel, refer to the Communicator tool overview for information about the following: <ul> Creating an offline SR for logistics Creating an offline SR for other teams (not logistics)   Creating an Offline SR in Unify-AD for logistics If you use Unify Agent Desktop (Unify-AD), originate an offline Service Request (SR) for logistics using information below: <ol> In the Edit SR view, click Create New SR.
 Note: You must undock the Edit SR window (move the frame to a floating window) to expand the view and see the Create New SR button.

 <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/Images/KB/KB2415/AD%201.png">
   Add the request summary in the Your Note field. Notes are needed so a team knows why they need to contact the buyer / seller. The following notes are needed for all GSP requests: <ol> Buyer user ID. Seller user ID. Item number. Reference ID (ORAA number located on the seller's view order details page). Updated address (if updating final ship-to address). Contact's phone number (if updating final ship-to address). International passport number (if updating final ship-to address and shipping to Russia).   Change the following fields: <ol> Request Site: United States. Expert Group: US Logistics Expert. Topic 1. Topic 2.   Click Create SR.

 <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/Images/KB/KB2415/AD%202%20logistics.png"><b r>   Creating an offline SR for other teams (not logistics) If you use Unify-AD, originate an offline SR for other teams (not logistics) using information below: <ol> In the Edit SR view, click Create New SR.
 Note: You must undock the Edit SR window (move the frame to a floating window) to expand the view and see the Create New SR button.

 <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/Images/KB/KB2415/AD%201.png">
   Add the request summary in the Your Note field. Notes are needed so a team knows why they need to contact the buyer / seller.
 Note: Do not address your SR to The Team or CARE etc. Its important that these do not get assigned to specific teams in order for your request to be completed in a timely manner. The following notes are needed for all non-GSP requests: <ol> Buyer user ID. Seller user ID. Item number. Case ID (if applicable). Return ID (if applicable). Reason assistance is needed.   Change the following fields: <ol> Request Site: United States. Expert Group: Should be left blank. If an expert group is selected, your request will not be assigned to a teammate.
 Exception: If the case or item value is over $750 for SNAD or $2000 for INR, Expert Group should be changed to: US M2M High ASP Claim. Topic 1. Topic 2.   Click Create SR.

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