

Engage Digital

Agent Training Guide

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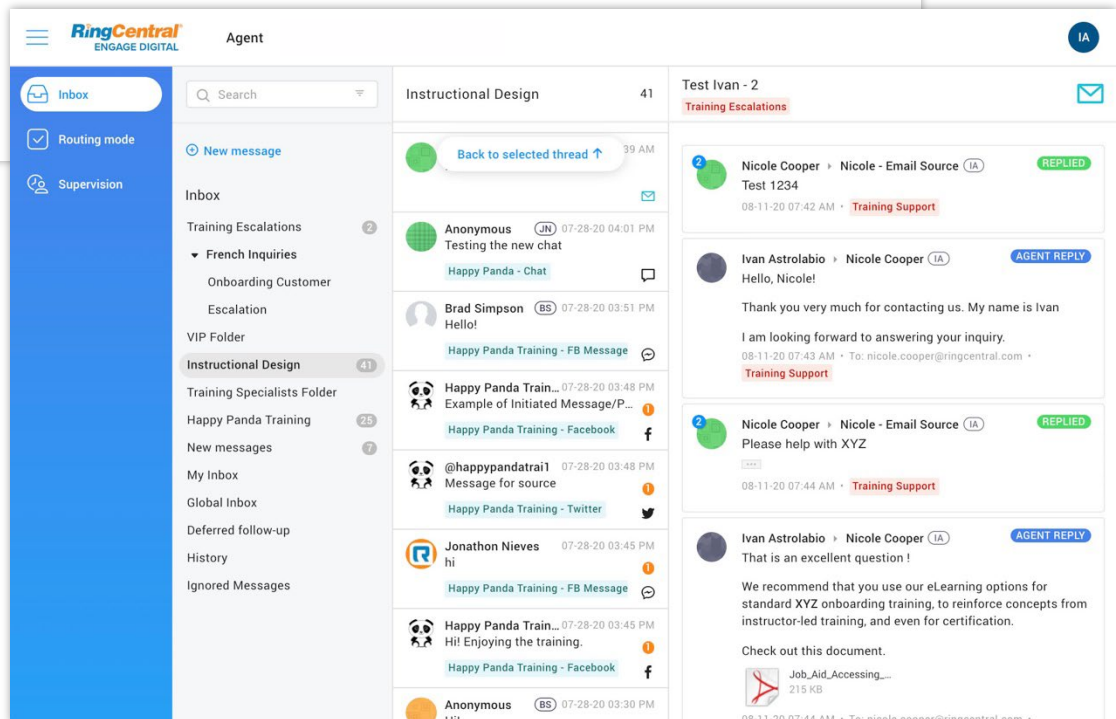
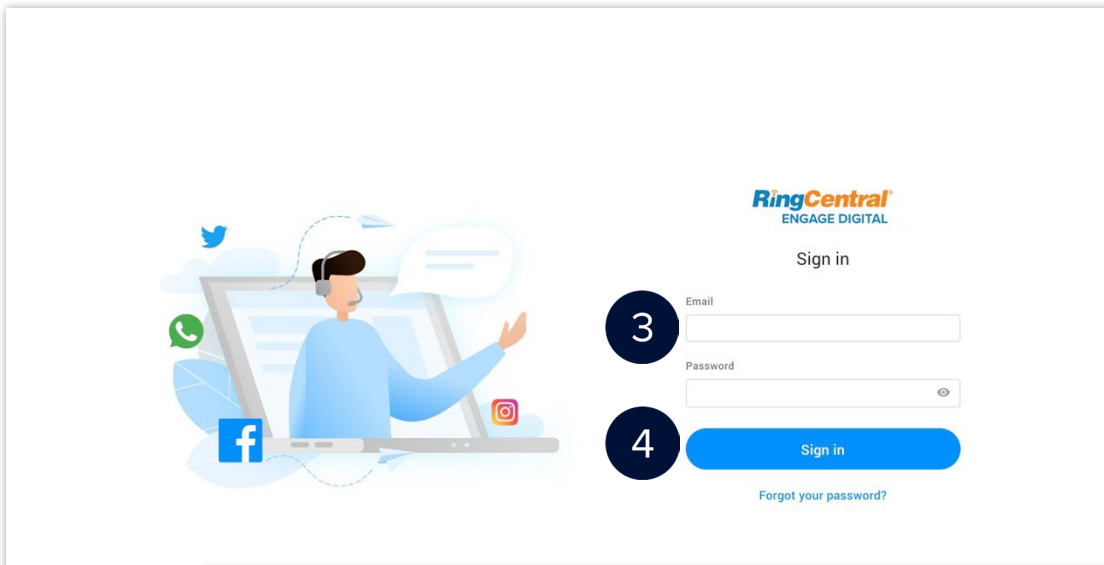
Agent

Navigating the Agent Interface

RingCentral Engage Digital provides all the tools you need to help customers in your digital interactions. Depending on what your organization uses, customers can reach out through various messaging platforms such as email, SMS, in-app messaging like WhatsApp, social media channels like Facebook or Instagram, even chat bots.

Logging In

1. Open a web browser.
2. Navigate to the RingCentral Engage Digital URL provided by your admin.
3. Type your email and password.
4. Click **Sign in**.



Interface Navigation

There are three areas available in the RingCentral Engage Digital Platform.

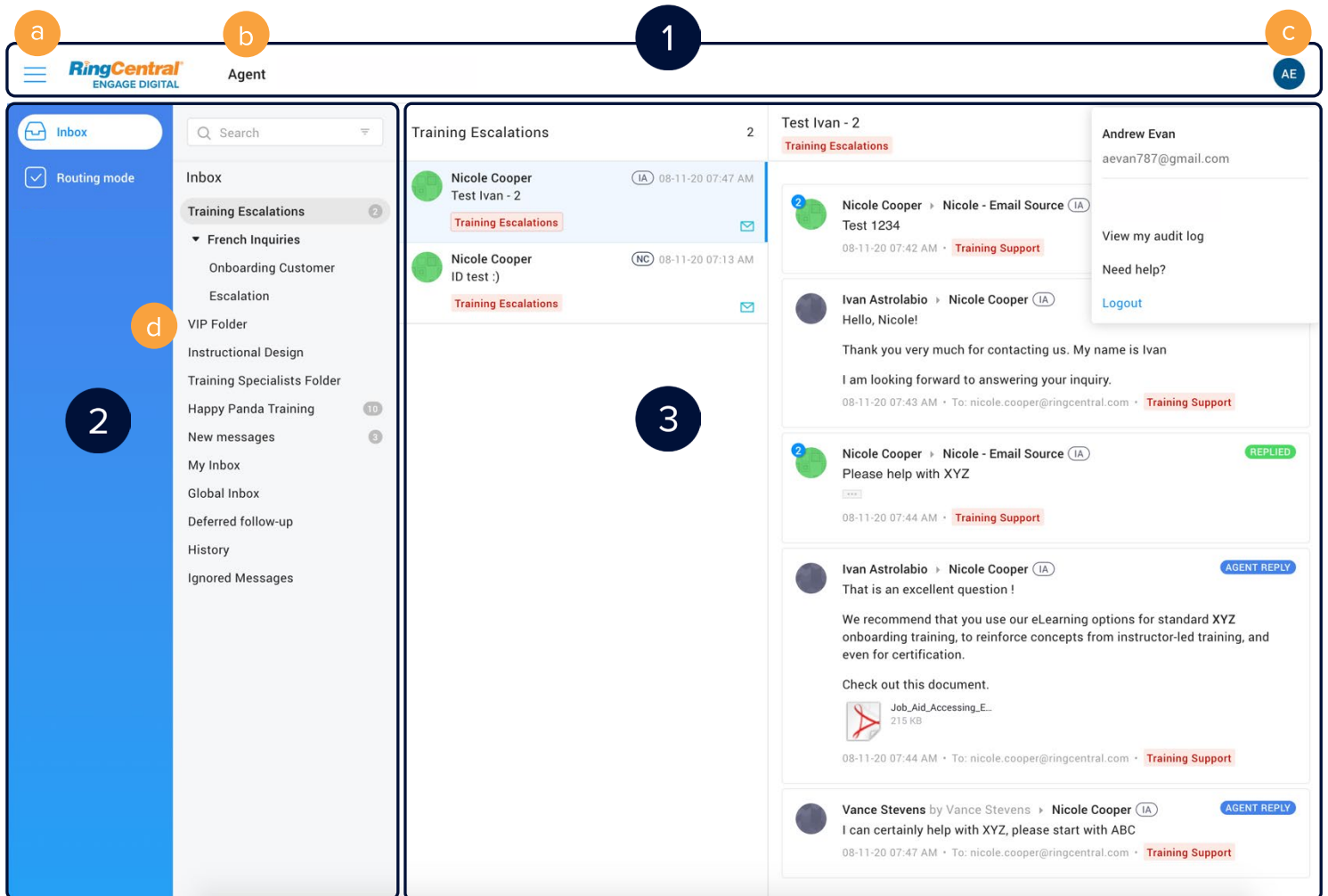
1. **Top Header Bar**

- a. **More Menu** - used to expand and collapse the left navigation bar.
- b. **Menu bar** - houses the main Agent tab for the RingCentral Engage Digital platform.
- c. **User details**
 - Agent badge or initials
 - General user account information
 - View my audit log – shows a timestamp of the agent’s activities
 - Need help? – Links to support documentation
 - Logout

2. **Left Navigation Bar** - shows the menu options of each main tab. The main menu options available to agents are Inbox view and Routing Mode view.

- d. **Sliding tray** - secondary menu of each menu option in the left navigation bar. This appears when you hover over a menu option.

3. **Message Area** - shows the threads and messages. The interface varies depending on whether you are in the Inbox view or the Routing Mode view.



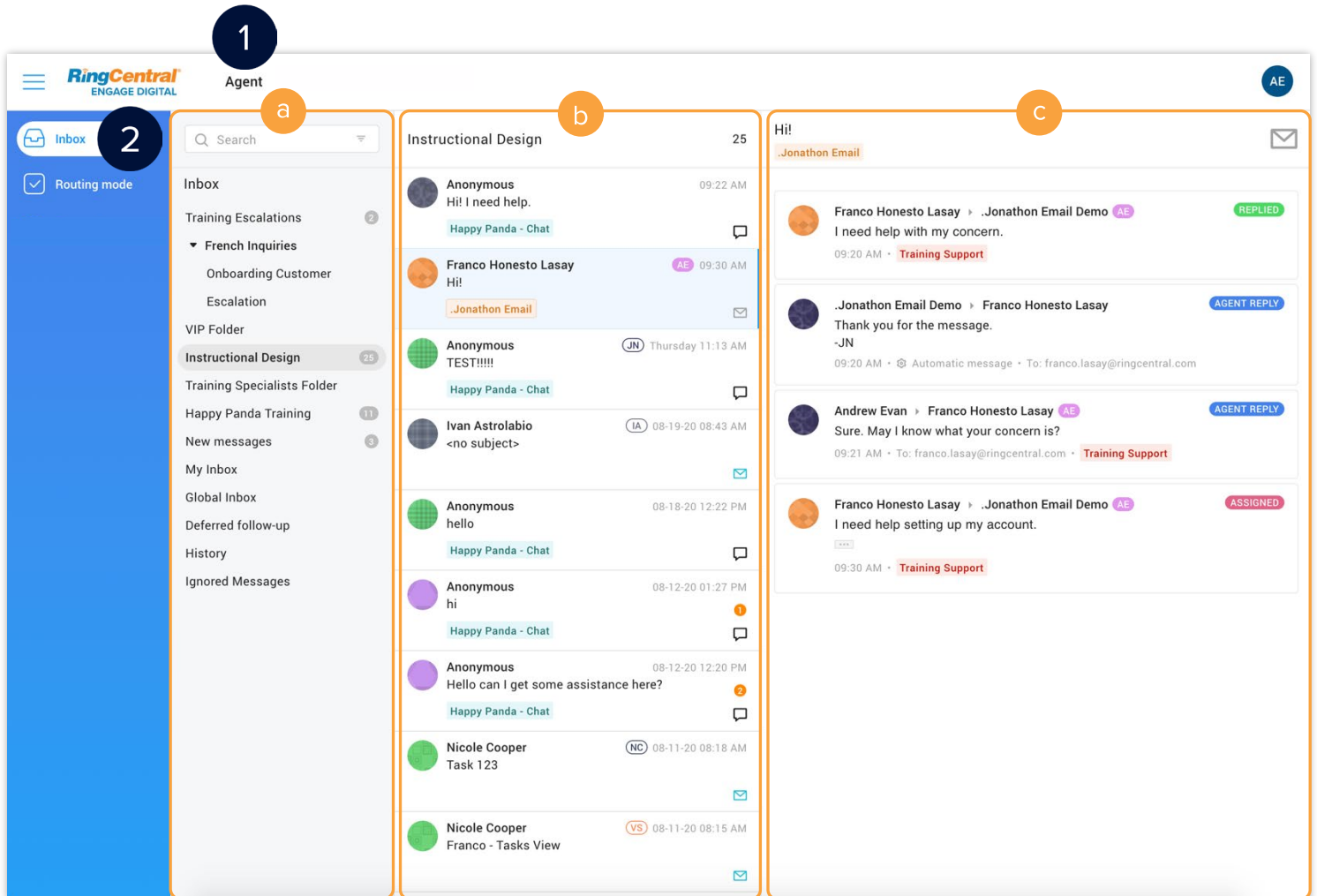
Inbox View

The inbox view allows you to manage messages by grouping them into folders, so you can easily look up, respond, and organize customer messages.

1. Click **Agent**.
2. Click **Inbox**.

The Inbox view has three parts:

- Inbox** - used to group messages by channel, contact pattern, status, team, etc.
- Threads** - composed of messages that are chronologically sorted (oldest first)
- Messages** - shows a specific customer message and the agent replies



THREADS

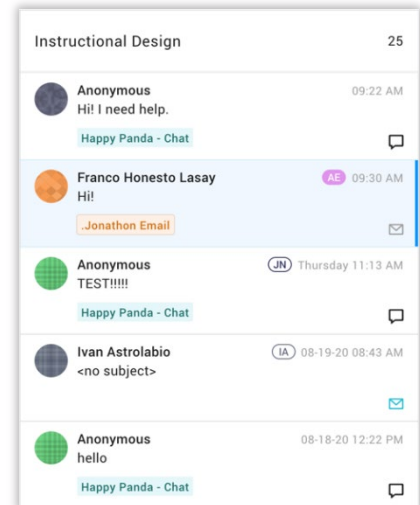
Agent badge assigned to a message. Dark background color is an active interaction and light background color is inactive.



Happy Panda - Chat **Categories** in the thread.

Channel of the thread.

Number of new messages in the thread.



MESSAGES

Access these by hovering the mouse on the message thread.

NEW Initial status of a message not yet engaged.

REPLIED Message assigned to the current agent after it has been engaged. It is part of a case but has not been replied to yet.

AGENT REPLY Reply from an agent, after clicking either the Reply or Private reply button.

ASSIGNED Message that was already replied to by an agent, after clicking Reply or Private reply.

IGNORED Message marked as not needing a reply, resulting from an agent clicking the Ignore button.

Engage button - allows you to assign the message to yourself.

Ignore Allows you to ignore the message.

Reply Allows you to reply to the message.

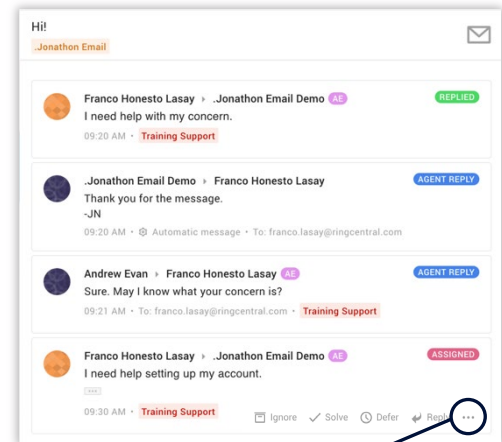
Defer Defers the case associated to the message by a time delay or number of days.

Solve Closes the case associated to the message. If there are still unanswered messages in the case, they are automatically archived.

Cancel case Allows you to unassign an assigned message. The message returns to the "New" status.

Private reply Depending on the channel, allows you to reply privately to a customer.

Training Support Post qualification categories only show once the case is solved. This category type allows you to specify the theme or disposition when the case is over.



Clicking the More icon (...) button shows additional actions common to both Inbox and Routing Mode views:

- a. **Recategorize** - changes thread/message/intervention categories.
- b. **Assign** - assigns the message to someone else.
- c. **Mute author** - ignores all new messages automatically from the author.
- d. **View audit log** - displays the thread Audit Log showing all the actions performed in the thread.

Routing Mode View

Messages are automatically routed to agents based on their configuration in the admin interface and according to Service Level Agreement, agent competencies, and level of urgency.

1. Click **Agent**.
2. Click **Routing Mode**.

The Routing Mode view has four parts:

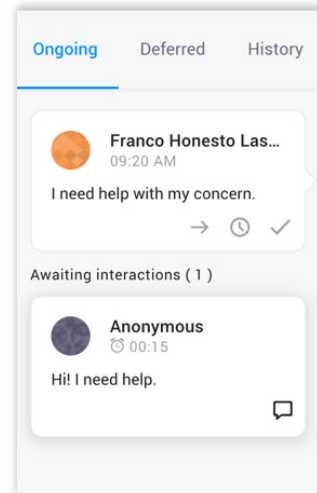
- Tasks** - shows Ongoing, Deferred, and History (completed tasks).
- Thread** - composed of messages in a task that are chronologically sorted (oldest first). The thread can be filtered according to agents and identities.
- Customer record/activity** - collects all information about the customer identity. It summarizes the status of all inquiries from a customer and provides the history of cases and messages.
- Presence status** - shows the agent's status. Agents are "Available" as long as they have not reached the number of tasks defined by the minimum capacity setting. Their status changes to "Available (busy)" once this number is reached. Agents can also make selections, such as for breaks and lunches.

Custom presence statuses are configured by the Admin (example: Pause, Training, Monitoring folder), so that supervisors have a precise view of their agents' activity from the Supervision console. To no longer receive messages, change the Presence status to something other than "Available". To receive messages again, switch your status back to "Available".

Routing Mode View Icons and Buttons

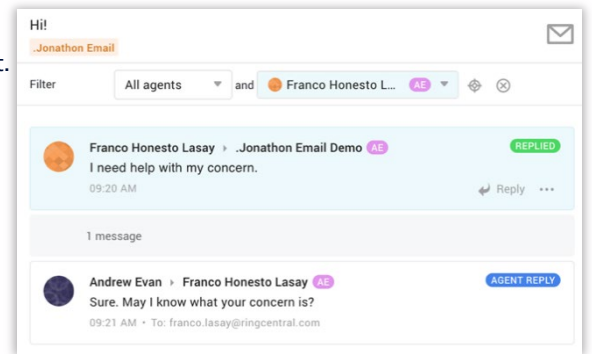
TASKS

- **Transfer** button – use this function to transfer messages to another agent, team, category, or language (skill).
- 🕒 **Defer** button - use this function if you cannot provide an immediate response to a customer, so you can reply later, or the customer has not replied yet and you wish to postpone the case until they respond. These messages are found on the Deferred tab.
- ✓ **Complete** button - this closes the case associated to the message. Completed messages are found on the History tab.
- 💬 **Channel** of the task.
- ↩️ **Resume** button - (History) allows to interact with a completed task.



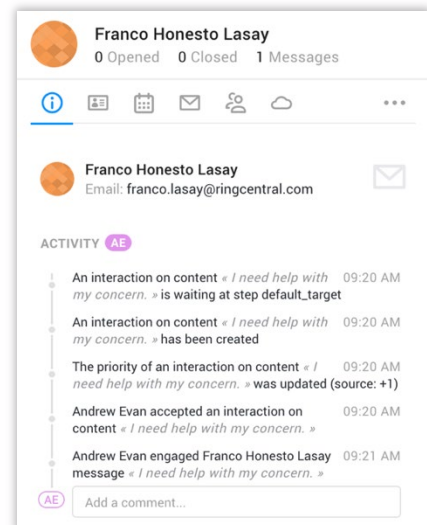
THREAD

- NEW** Initial status of a message not yet engaged.
- REPLIED** Message assigned to the current agent after it has been engaged. It is part of a case but has not been replied to yet.
- REPLIED** Reply from an agent, after clicking either the Reply or Private reply button.
- AGENT REPLY** Message that was already replied to by an agent, after clicking either the Reply or Private reply button.
- ASSIGNED** Message marked as not needing a reply, resulting from an agent clicking the Ignore button.
- AE AE** Agent badge assigned to a message.



CUSTOMER RECORD/ACTIVITY

- 📄 **Summary** shows the timeline of activities related to the customer
- 👤 **Profile** of the customer
- 📅 **Cases** - shows the initial message(s) sent by the customer
- ✉️ **Messages** displays the communication thread of the case with this customer (newest first)
- 🔍 **Identities** allows merging of a customer's different identities into one record



Using the Routing Mode View for Agents

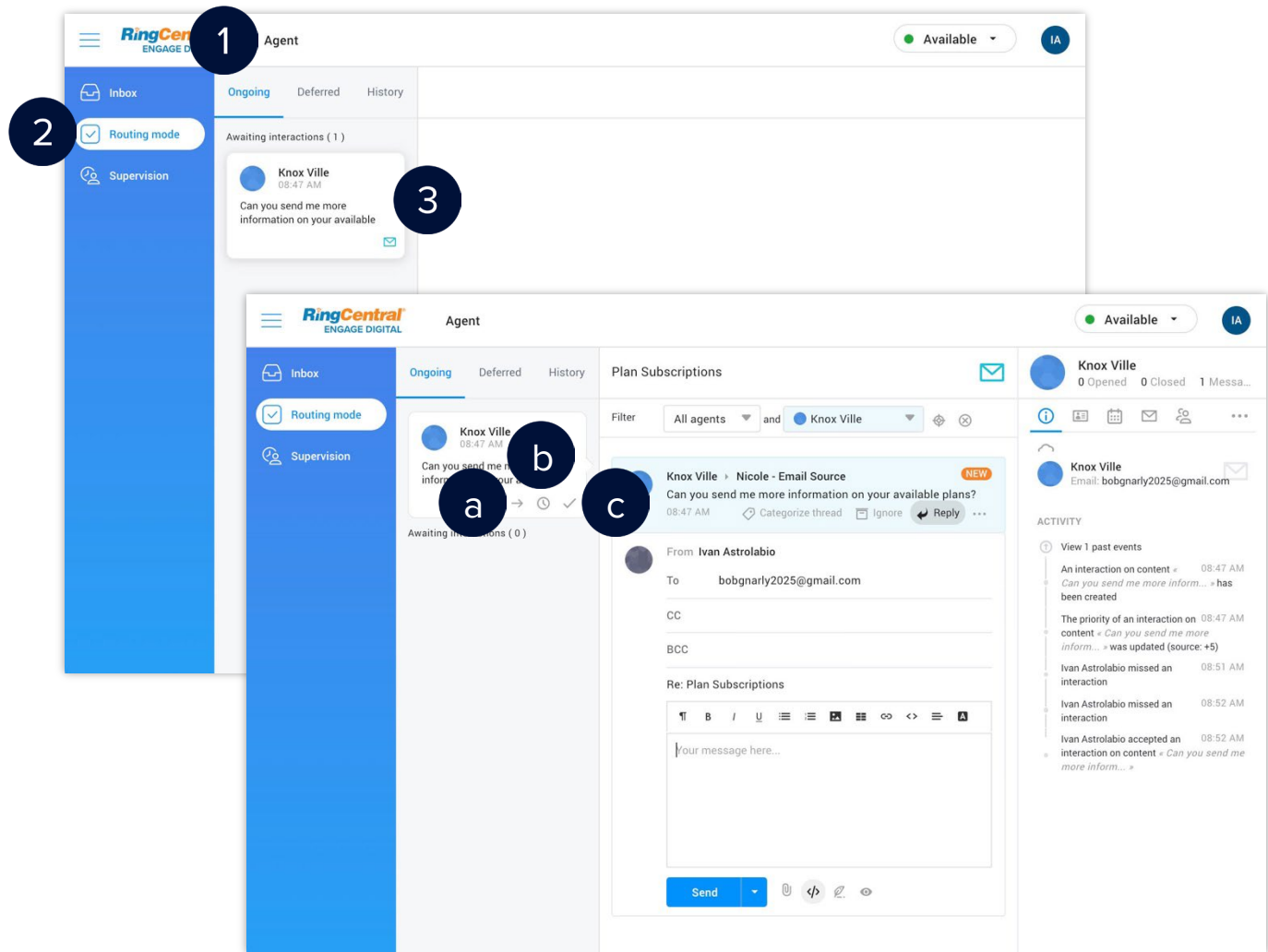
Agents receive their cases automatically through the RingCentral Engage Digital Routing Mode view. This distributes messages to agents based on their capability, as well as the severity level of the case, based on the defined Service Level Agreement.

Accepting Cases

1. Click **Agent**.
2. Click **Routing mode**.
3. Click the awaiting case to accept it.

The case becomes active and its content displays. The following action buttons appear on the case:

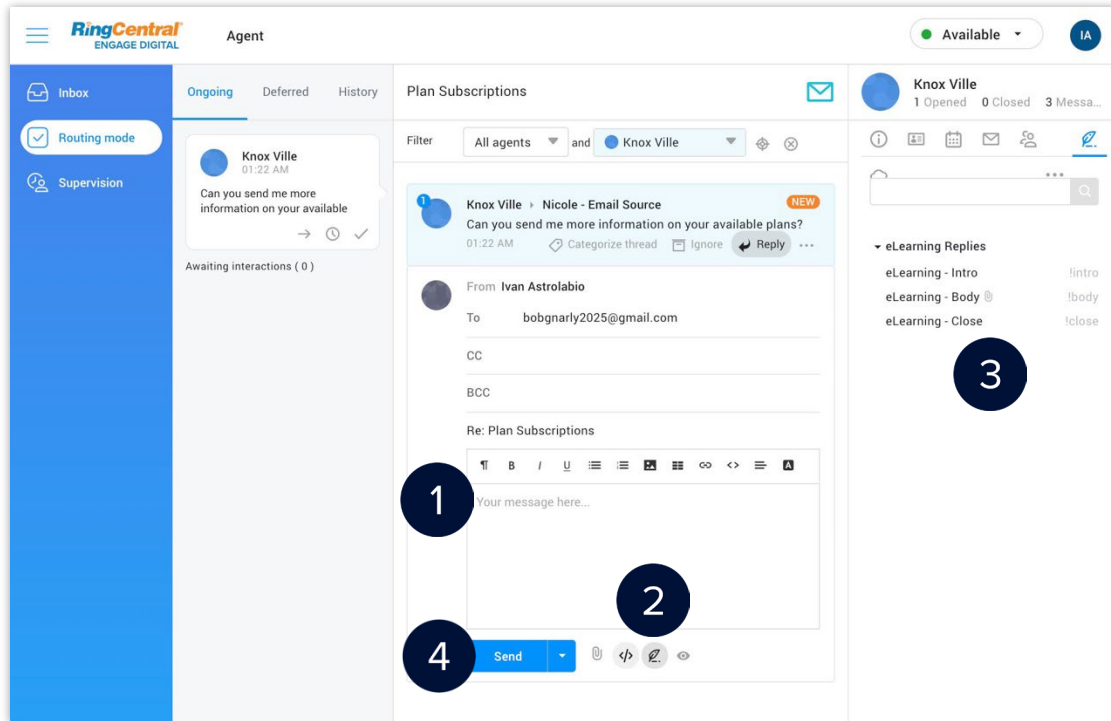
- a. **Transfer** (→) button – transfers messages to another agent, team, category, or skill
- b. **Defer** (⌚) button – delays replying to the message for a specific duration
- c. **Complete** (✓) button – closes the case associated to the message



Replying to Messages

After accepting cases, follow these steps to reply to messages:

1. Type your reply and use the available formatting options.
2. Alternatively, click the **Reply assistant** (📝) button to access the preconfigured responses.
3. Select the appropriate reply from the list of replies.
4. Click **Send**.



Reply Window Buttons

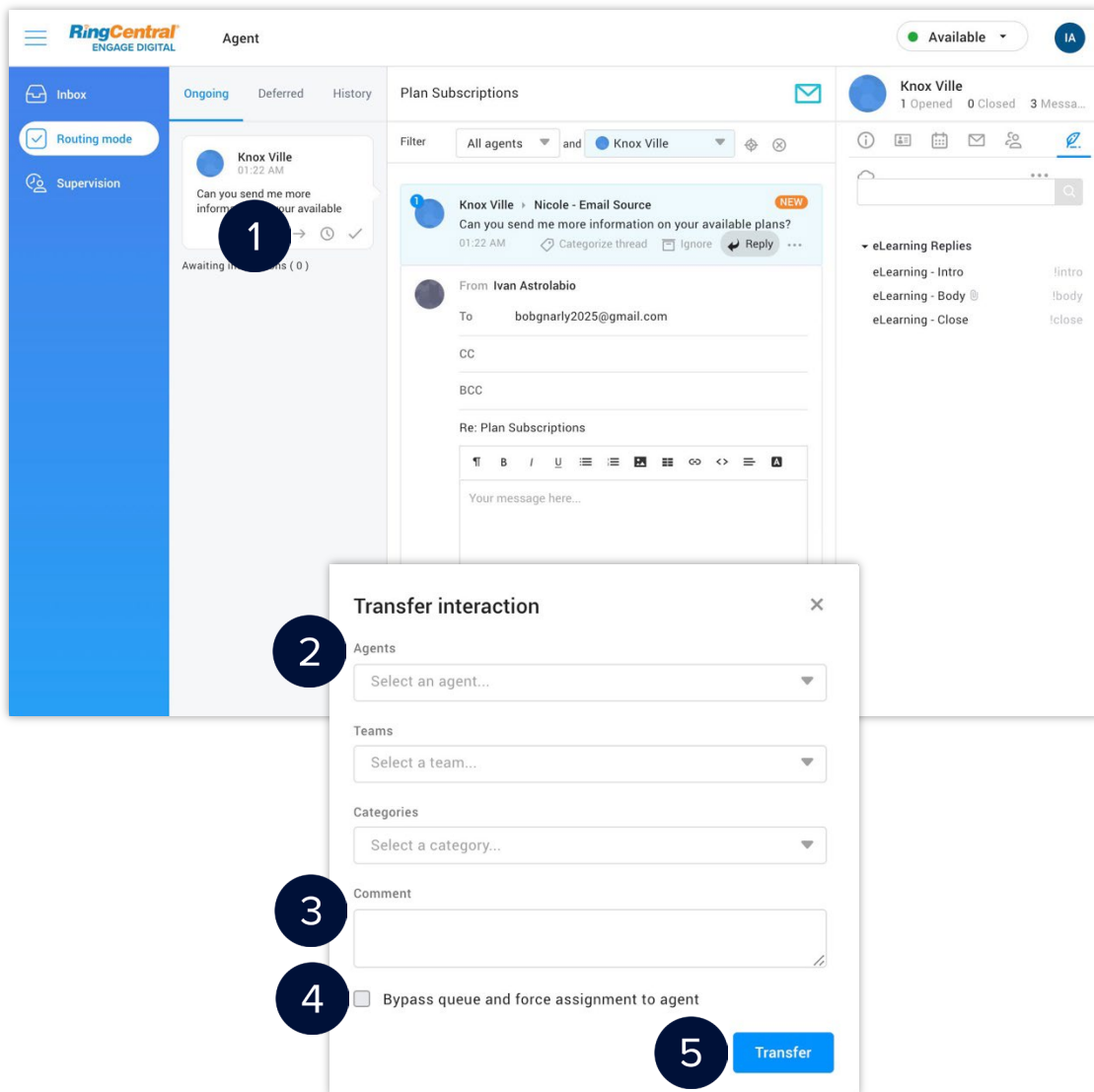
Depending on the agent's channels and permissions, some buttons may not be available.

Button	Description
😊	Emojis used on Facebook and Twitter channels.
📎	Add attachments for all supported channels.
</>	Use the HTML editor to edit the message in HTML (versus rich text).
280	Twitter character count (280 characters).
📝	Use the reply assistant to access preconfigured responses.
👁️	Preview the message before sending it.

Transferring Cases

After accepting cases, follow these steps to transfer messages to another agent, team, or category:

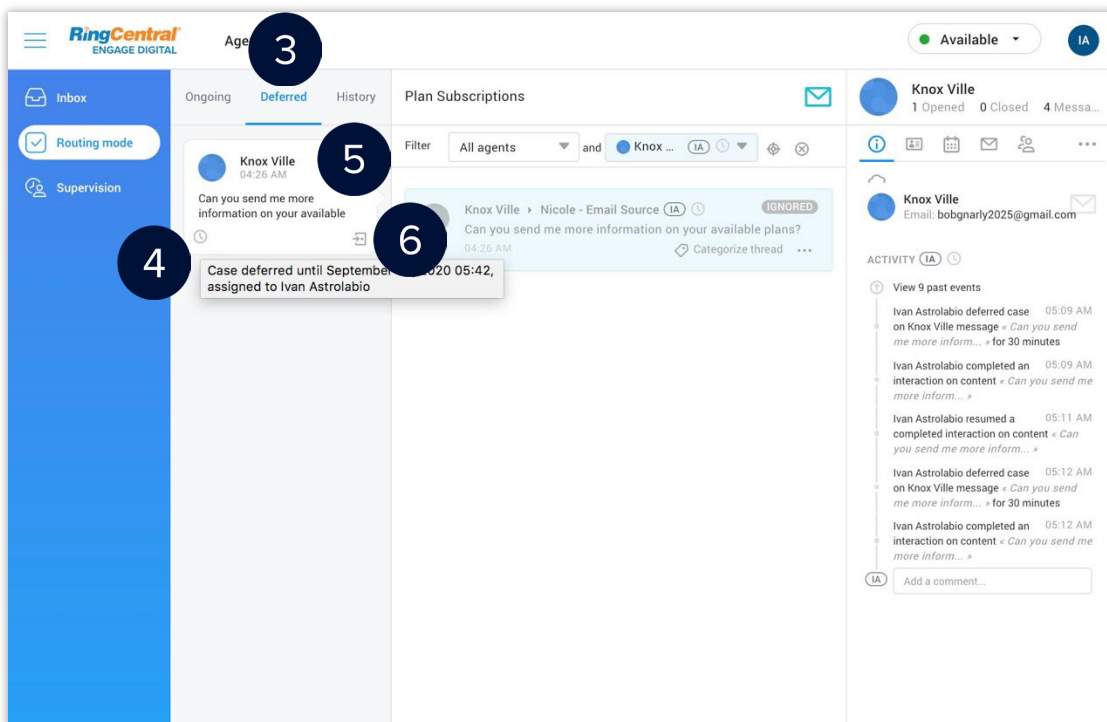
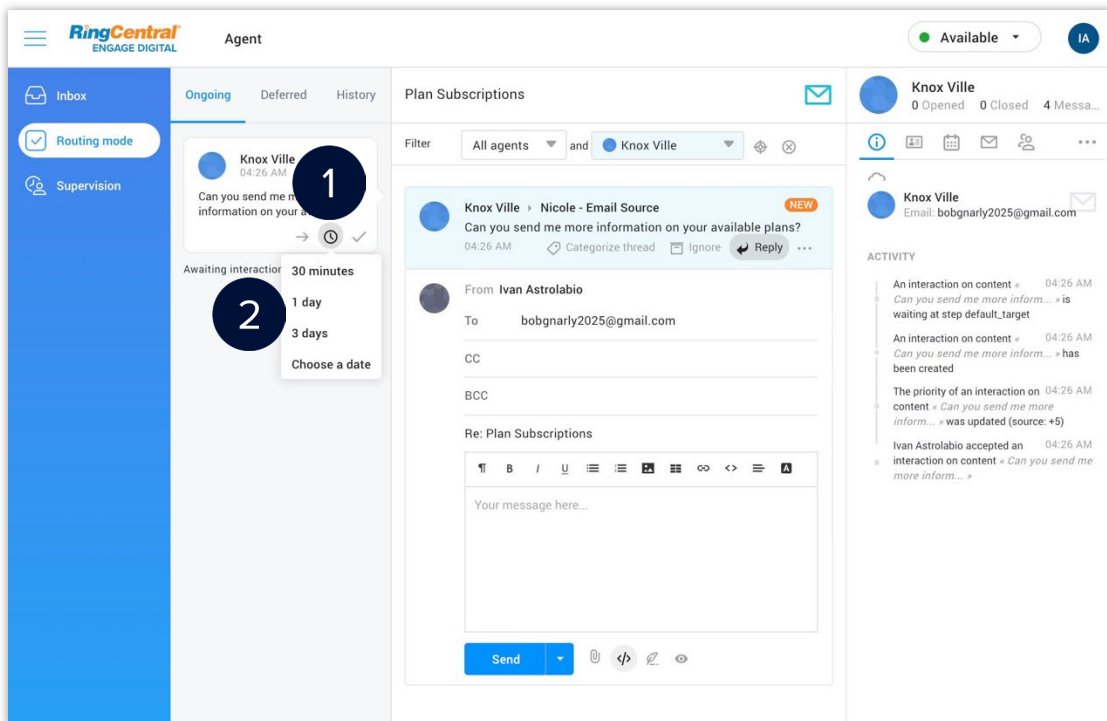
1. Click the **Transfer** (→) button.
2. Select the appropriate option from the following dropdown menus:
 - a. Agents
 - b. Teams
 - c. Categories
3. Type your comments or instructions. (optional)
4. To transfer to a specific agent, check **Bypass queue and force assignment to agent**. This only works if you have the Monitor Tasks permission. (optional)
5. Click **Transfer**.



Deferring Cases

After accepting cases, follow these steps to delay replying to messages:

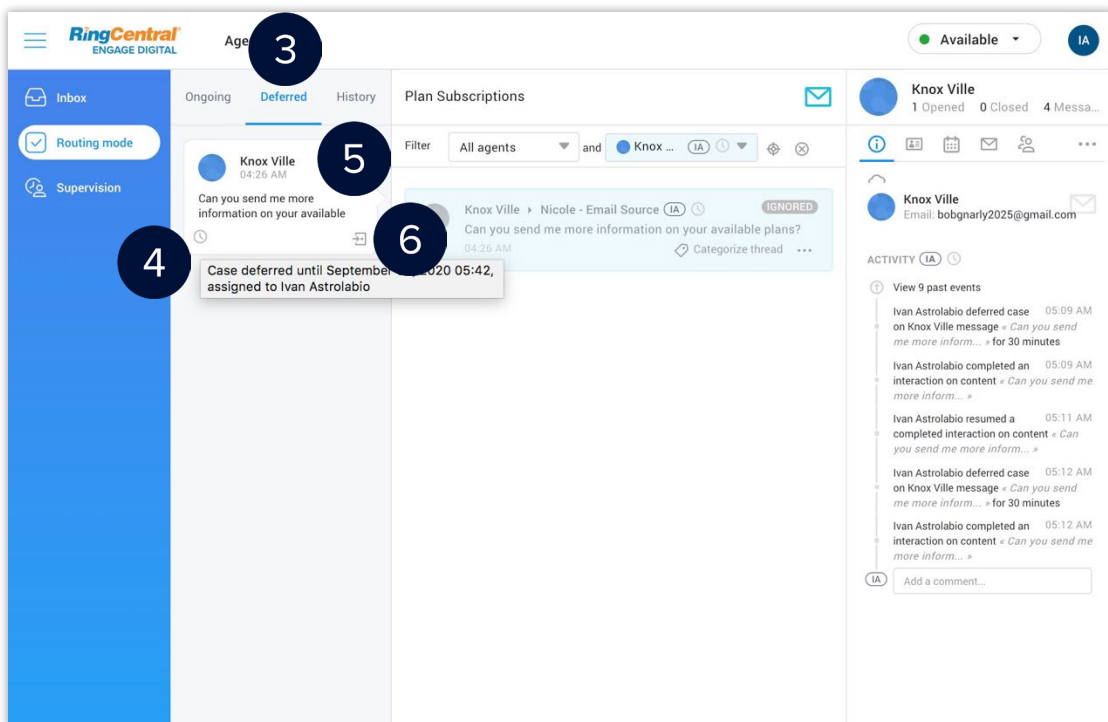
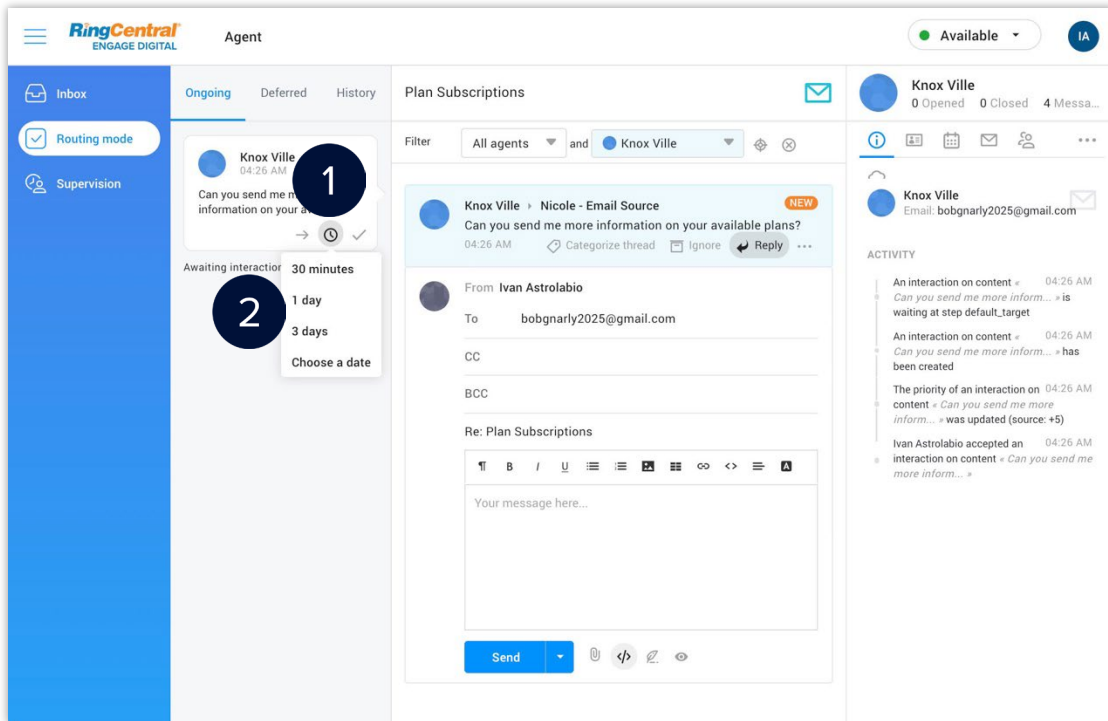
1. Click the **Defer** (🕒) button.
2. Select the appropriate duration to defer the messages.
3. The message moves from the Ongoing to the Deferred tab.
4. Hover your mouse on the **Defer** (🕒) icon to see the deferred time and date.
5. If you need to resume processing, click the case.
6. Click the **Resume** (🔄) button.



Deferring Cases

After accepting cases, follow these steps to delay replying to messages:

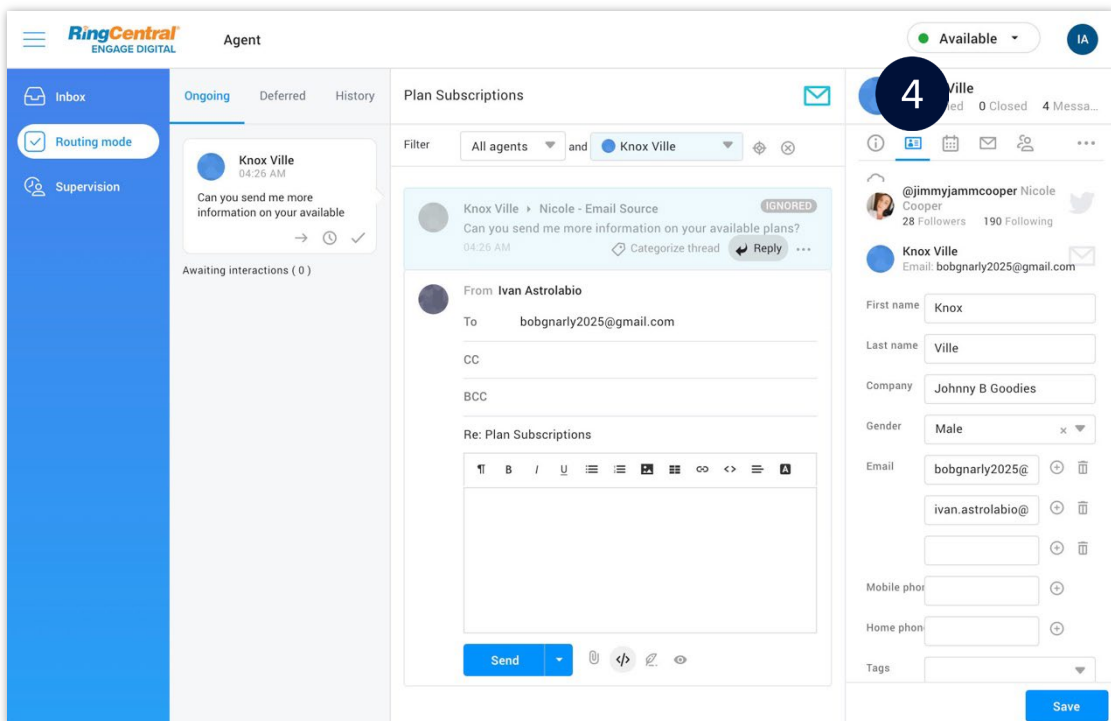
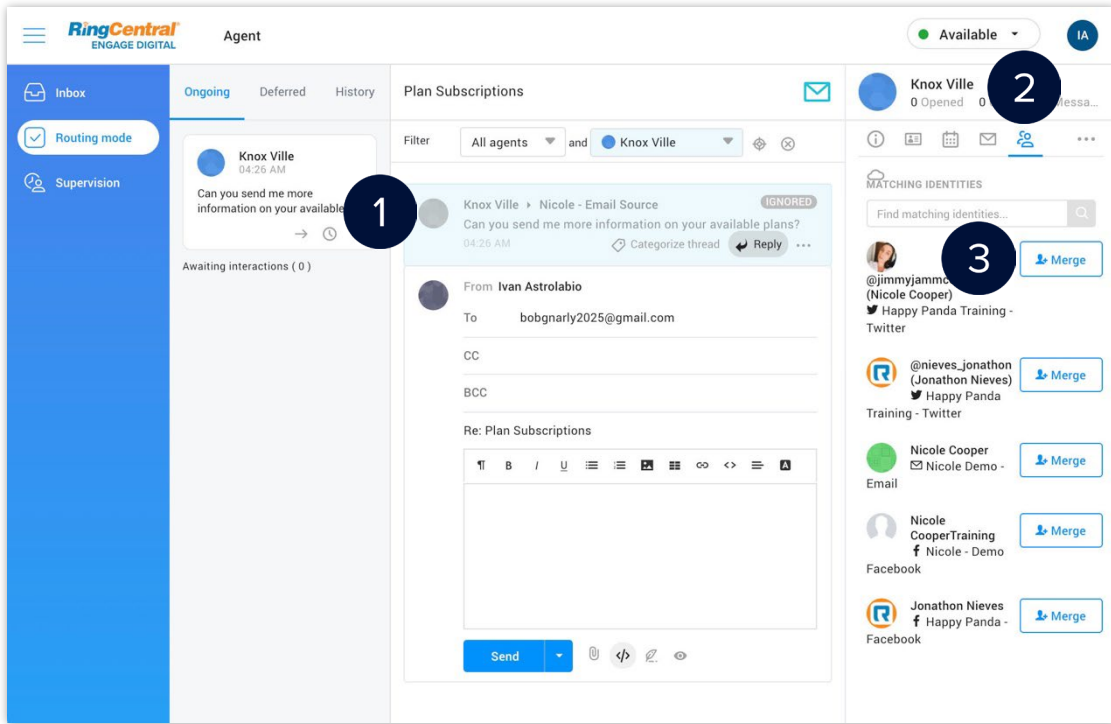
1. Click the **Defer** (🕒) button.
2. Select the appropriate duration to defer the messages.
3. The message moves from the Ongoing to the Deferred tab.
4. Hover your mouse on the **Defer** (🕒) icon to see the deferred time and date.
5. If you need to resume processing, click the case.
6. Click the **Resume** (🔄) button.



Merging Customer Identities

If a customer is on many channels, like email, Twitter, Facebook, and so on, you can merge the identities associated with them into one record.

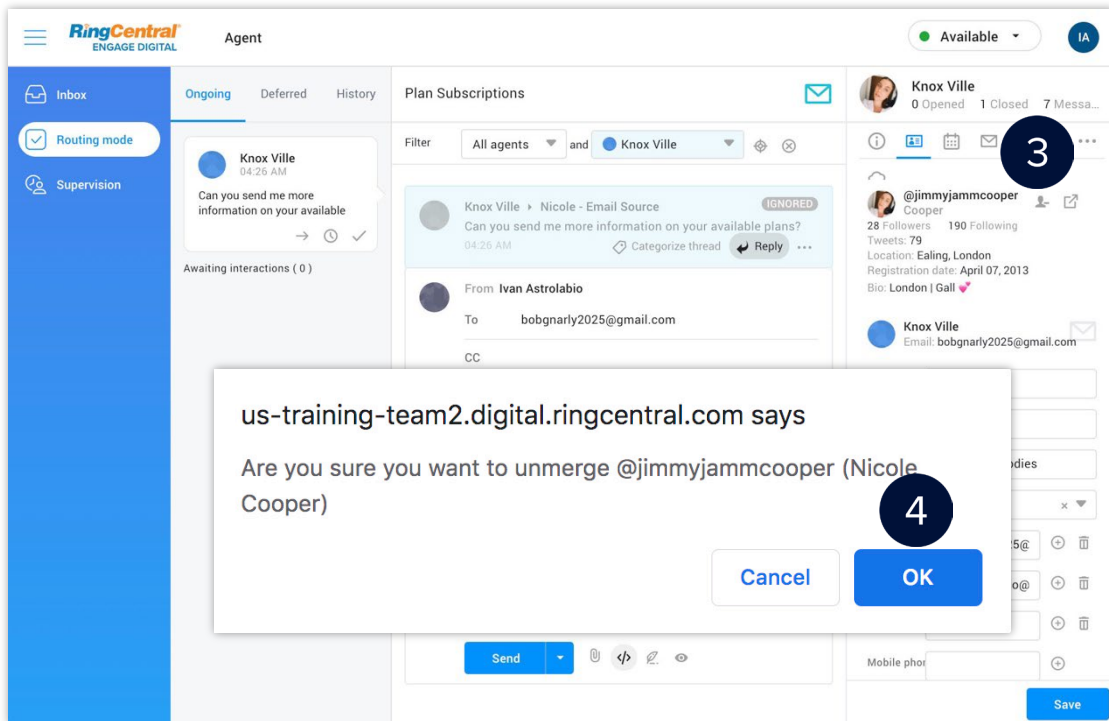
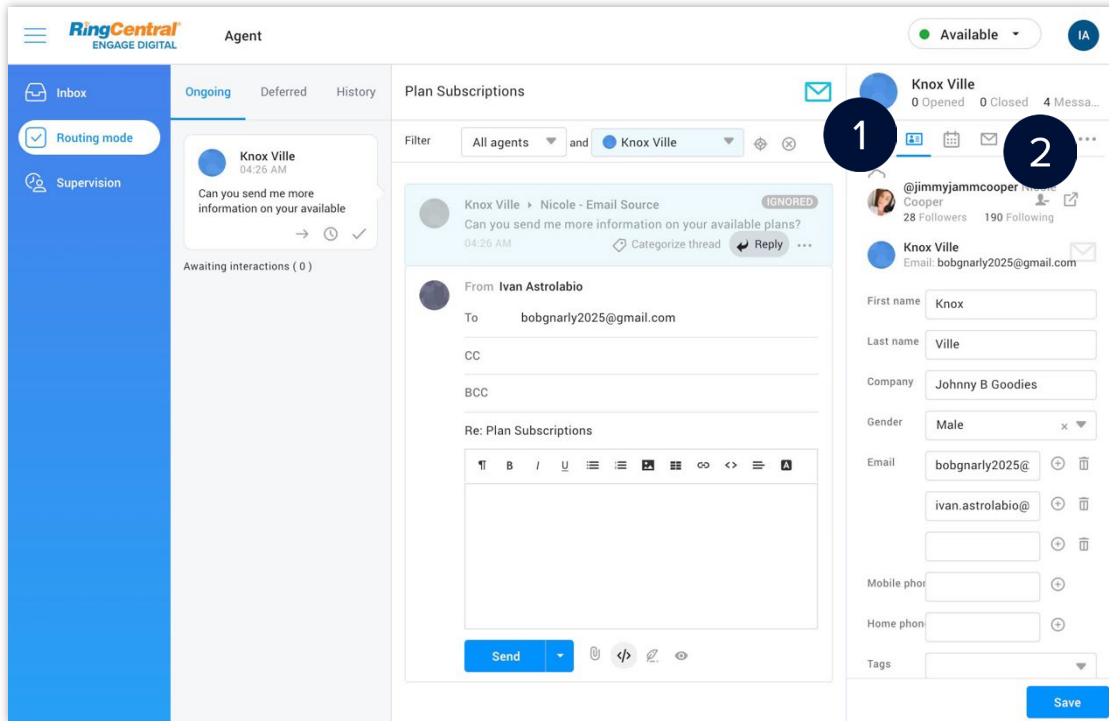
1. Click the name or avatar of the customer.
2. Click the **Identities** (👤) button.
3. Click **Merge** beside the identity that you need to associate with the customer.
4. The associated identity appears in the Profile tab of the customer record.



Unmerging Customer Identities

Click the name or avatar of the customer.

1. Click the **Profile** (👤) button.
2. Hover your mouse on the identity to dissociate and then click the **Unmerge** (⚡) button.
3. More information about the identity displays. Click the **Unmerge** (⚡) button again.
4. Click **OK**.



Using the Inbox View for Agents

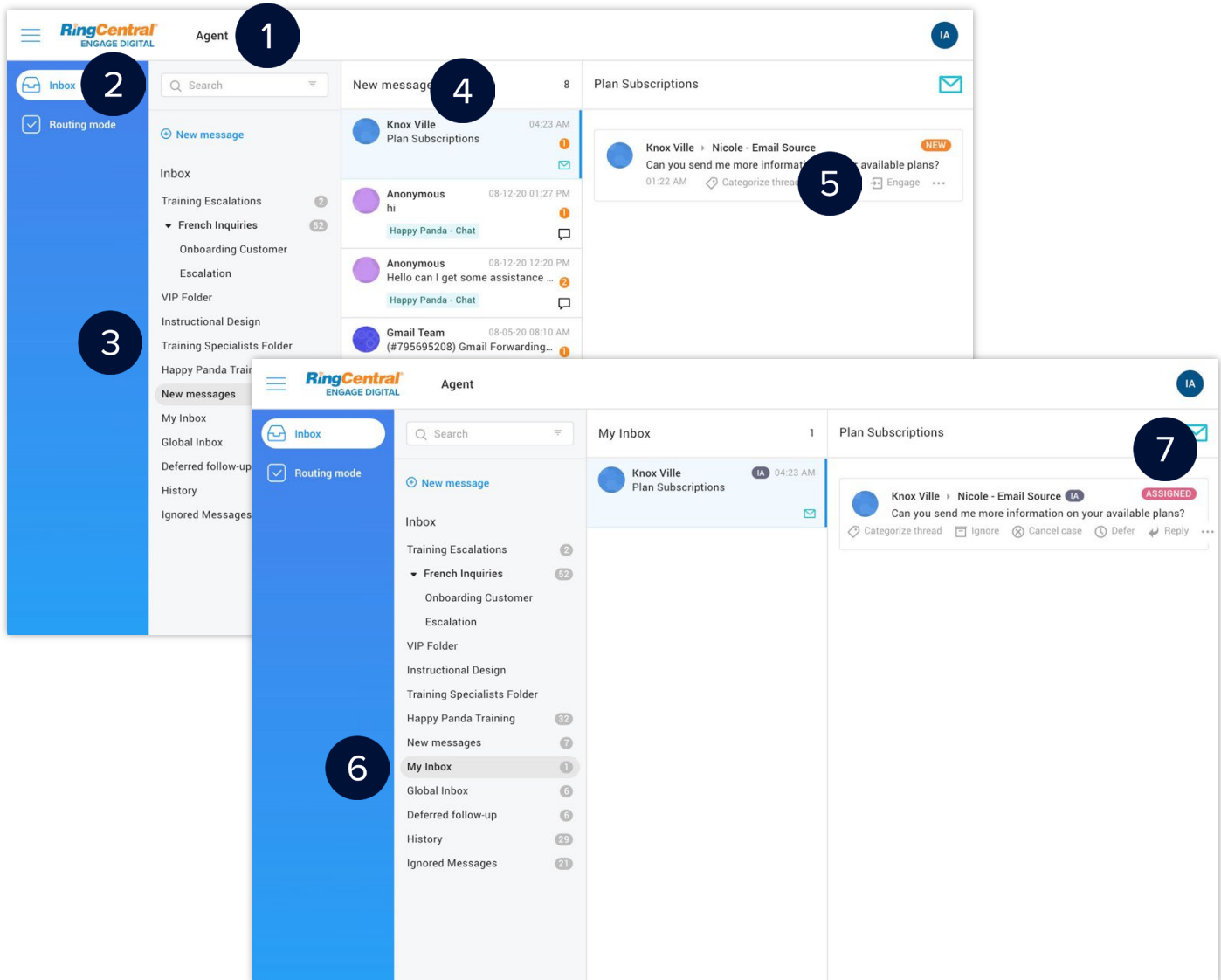
Inbox allows for the grouping of messages according to their channel, theme, status, team, or category. This grouping is similar to folders and subfolders in an email inbox.

Assigning Messages

While in the Inbox view, agents must assign messages to themselves before they can reply to the first message of a customer thread. This prevents several agents from responding to the message at the same time.

1. Click **Agent**.
2. Click **Inbox**.
3. Click the folder that contains the message to be assigned.
4. Click the message.
5. Hover over the message and click **Engage**.
6. The message moves to the My Inbox folder.
7. The message status changes from NEW to ASSIGNED.

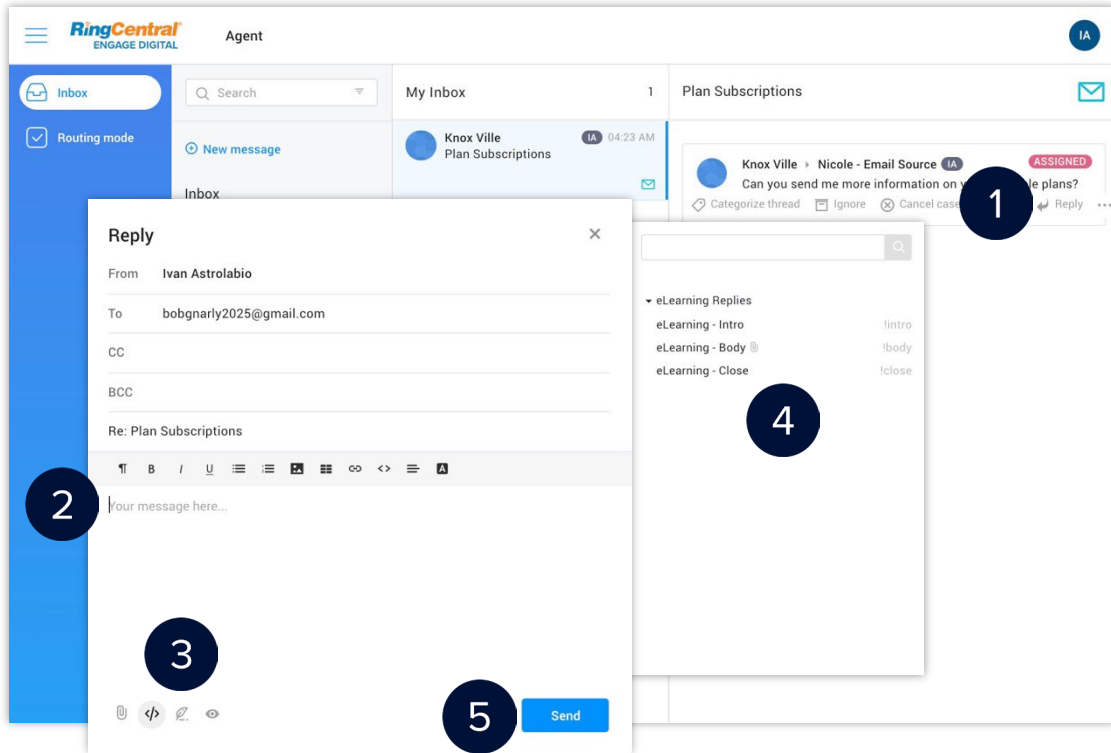
If categories are mandatory, a categorization window appears once you click Engage. You must categorize the case to assign the message to yourself.



Replying to Messages

After assigning cases to yourself, follow these steps to reply to messages:

1. Hover over the message and click **Reply**.
2. Type your reply and use the available formatting options.
3. Alternatively, click the **Reply assistant** (📝) button to access preconfigured responses.
4. Select the appropriate reply from the list of replies.
5. Click **Send**.



Reply Window Buttons

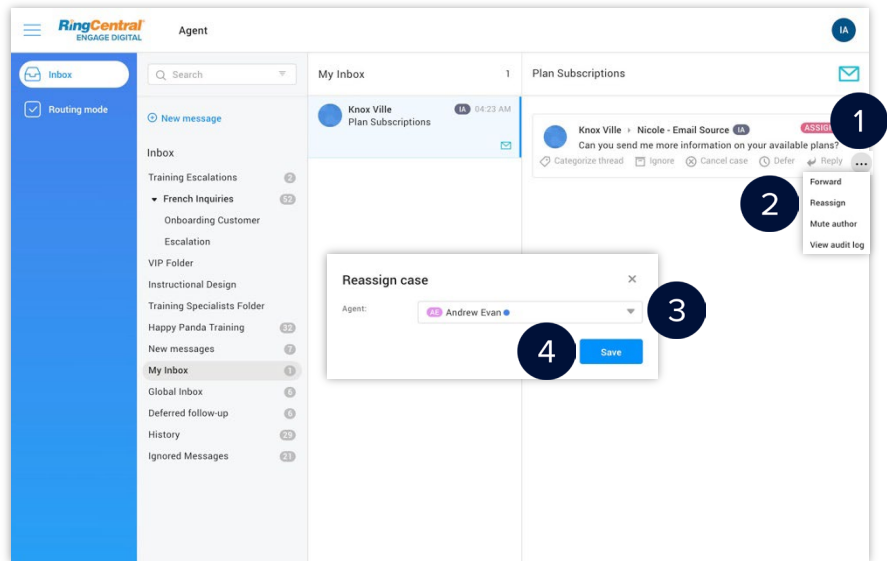
Depending on the agent's channels and permissions, some buttons may not be available.

Button	Description
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📎	Add attachments for all supported channels.
</>	Use the HTML editor to edit the message in HTML (versus rich text).
280	Twitter character count (280 characters).
📝	Use the reply assistant to access preconfigured responses.
👁️	Preview the message before sending it.

Reassigning Cases

After assigning cases to yourself, follow these steps to reassign messages to another agent:

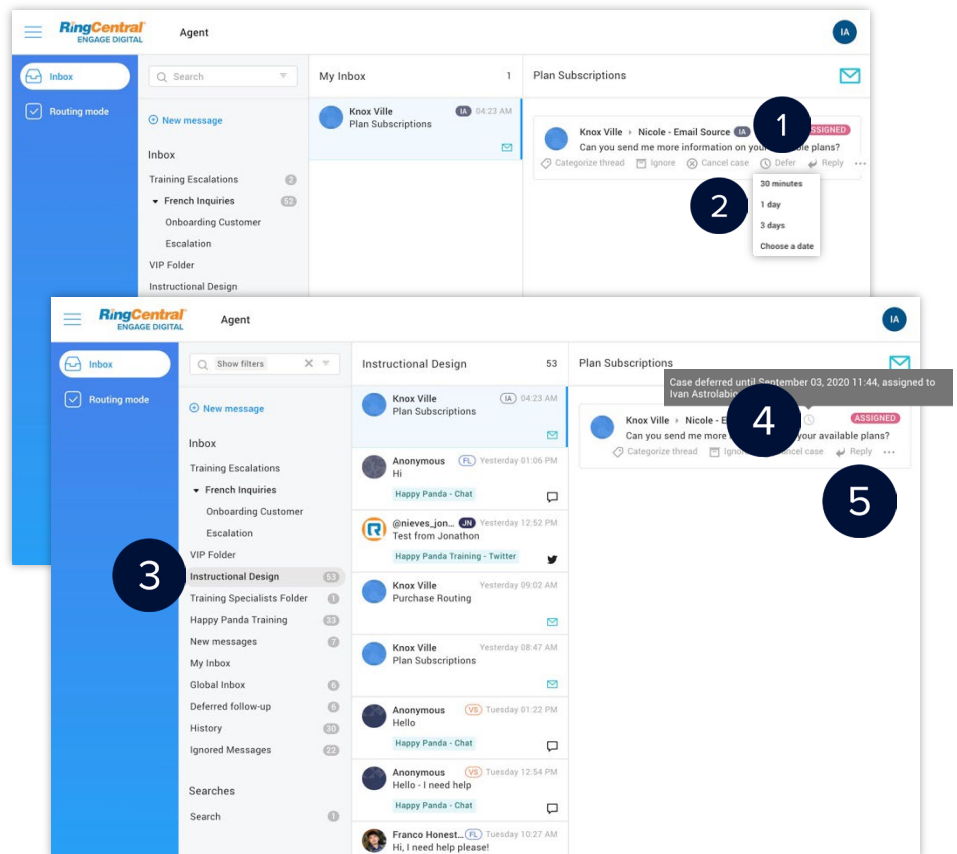
1. Hover your mouse over the message and click the **More icon** (⋮).
2. Select **Reassign**.
3. Select an agent from the **Agent** dropdown menu.
4. Click **Save**.



Deferring Cases

After assigning cases to yourself, follow these steps to delay replying to messages:

1. Hover your mouse over the message and click **Defer**.
2. Select a time or date from the dropdown menu.
3. The message moves to the Deferred folder (folder name may vary).
4. Hover your mouse on the **Defer** (🕒) icon to see the deferred time and date.
5. If you need to resume processing, click **Reply**.



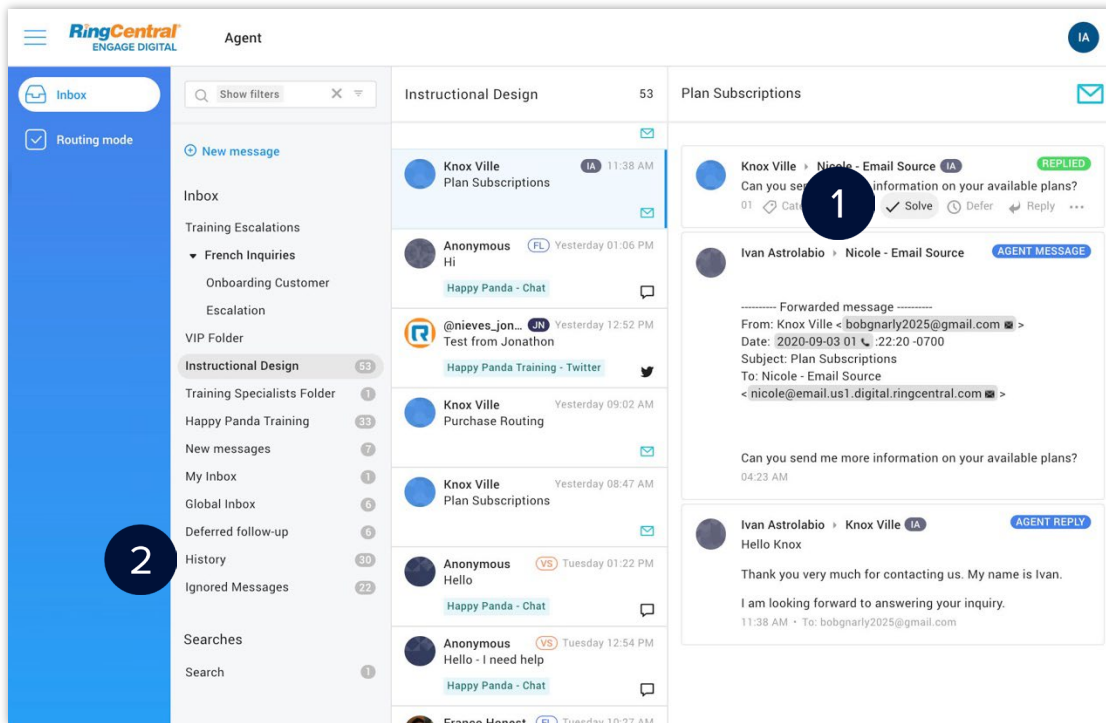
Solving Cases

After assigning cases to yourself, follow these steps to close the case associated to the message.

1. Hover your mouse on a message from the case and click **Solve**.
2. The case moves to the History folder (folder name may vary).

If categories are mandatory, a categorization window appears once you have clicked Solve. You must categorize the case to close it.

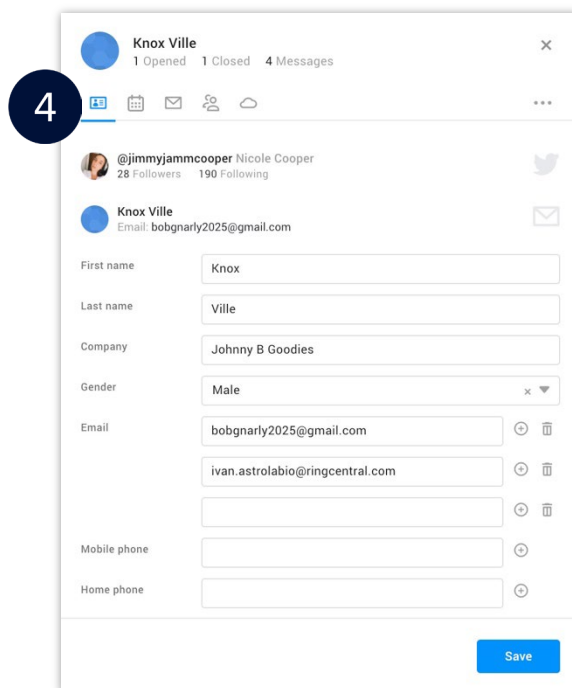
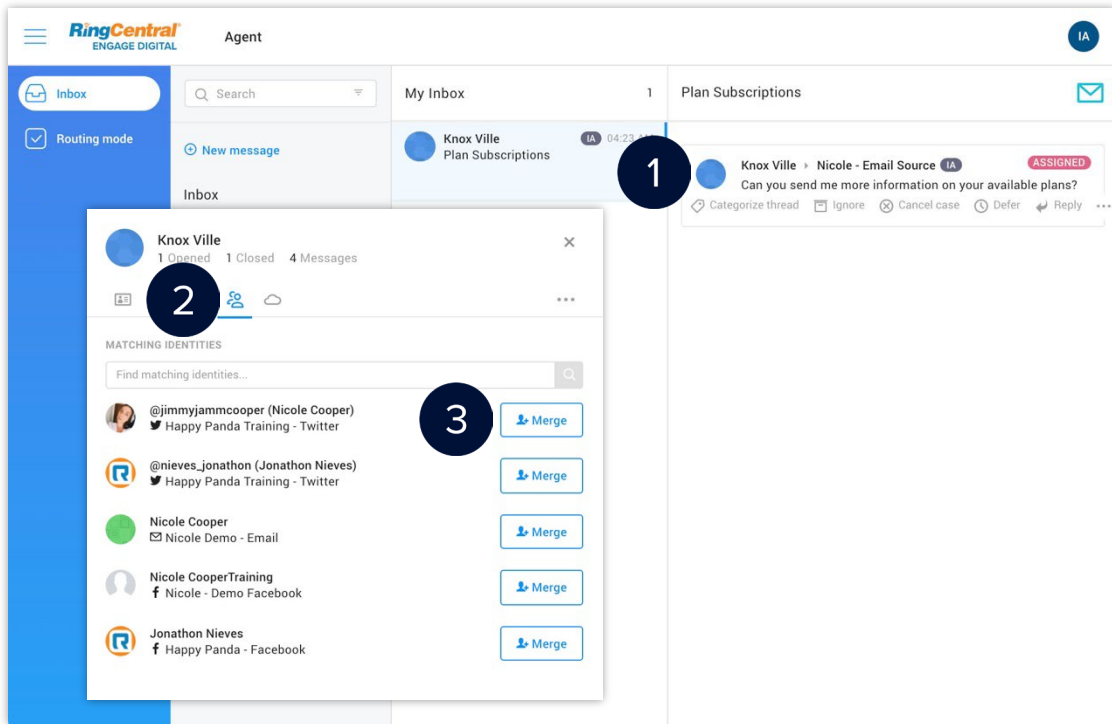
If the case contains unanswered messages and you click the Solve button, these messages are automatically ignored.



Merging Customer Identities

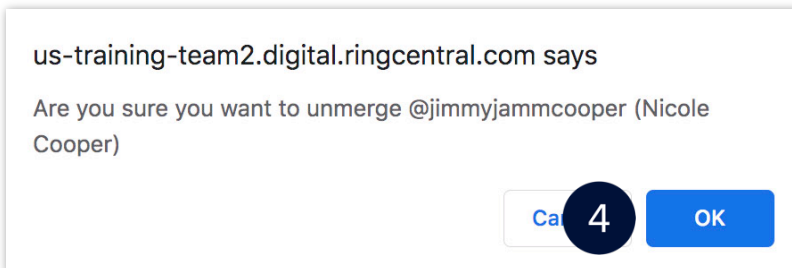
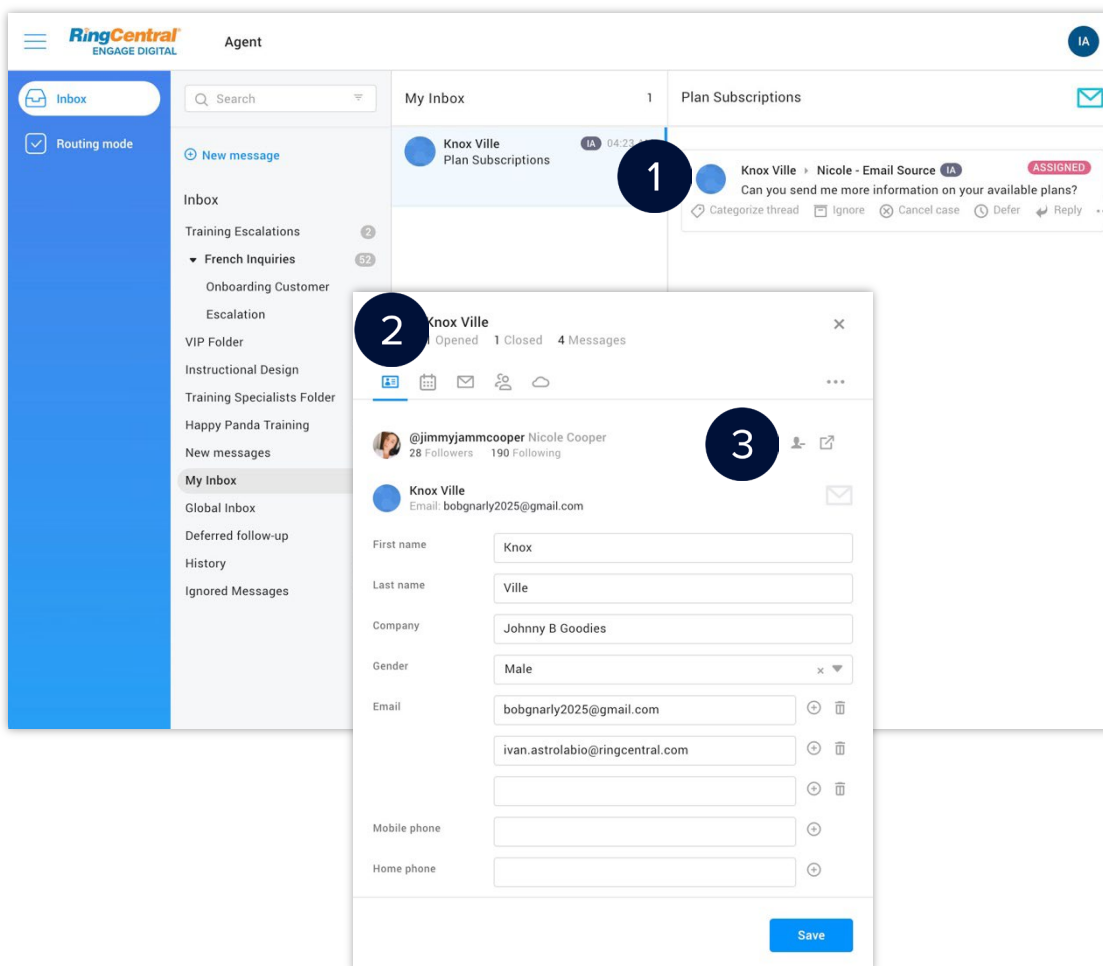
If a customer is on many channels, like email, Twitter, Facebook, and so on, you can merge the identities associated with them into one record.

1. Click the name or avatar of the customer.
2. Click the **Identities** (👤) button.
3. Click **Merge** beside the identity that you need to associate with the customer.
4. The associated identity appears in the Profile tab of the customer record.



Unmerging Customer Identities

1. Click the name or avatar of the customer.
2. Click the **Profile** (ID) button.
3. Hover your mouse on the identity to dissociate and then click the **Unmerge** (⊖) button.
4. Click **OK**.





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