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Agent Workspace Agent's Guide

Standard responses

Contents

- 1 Using the Responses View
- 2 Responses Explorer
- 3 Search and Filter
- 4 How do I add or remove favorites?
 - 4.1 Adding a Favorite
 - 4.2 Favorites Filter
 - 4.3 Removing a Favorite
- 5 How do I use Standard Response Shortcuts?
- 6 Using Suggested Responses
- 7 What next?
- 8 Top 5 topics

- Agent
- Supervisor

While you are handling an interaction, you can use the Responses tab in the interaction view to access a database of pre-written standard responses for your interactions. You can insert a response as a reply into any outbound interaction, such as an email or a chat message, or you can read them to the contact during a phone interaction.

Related documentation:

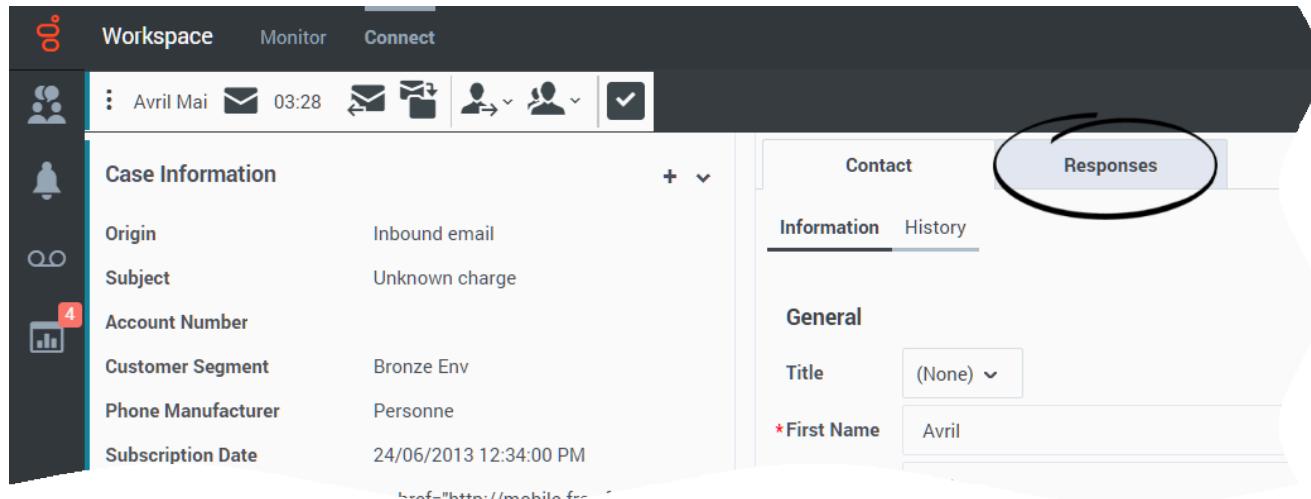
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Tip

After inserting a response into an outbound interaction, such as an email or a chat message, you can modify the contents of the text.

[Link to video](#)

Using the Responses View



The screenshot shows the Agent Workspace interface. At the top, there are tabs for 'Workspace', 'Monitor', and 'Connect'. Below the tabs, there is a header with user information (Avril Mai, 03:28) and various icons. On the left, there is a sidebar with icons for users, notifications (4), and reports. The main area is divided into two sections: 'Case Information' on the left and 'Contact' on the right. The 'Contact' section has tabs for 'Information' and 'History', with 'Information' selected. It shows a 'General' section with a 'First Name' field containing 'Avril'. The 'Case Information' section lists details such as 'Origin: Inbound email', 'Subject: Unknown charge', 'Account Number', 'Customer Segment: Bronze Env', 'Phone Manufacturer: Personne', and 'Subscription Date: 24/06/2013 12:34:00 PM'. A blue oval highlights the 'Responses' tab in the top navigation bar.

To access the Responses view, select the **Responses** tab on the active-interaction window.

The Responses view comprises two main areas: the Responses Explorer folder view and the response display area.

You can find responses in one of two ways:

1. Browse using the Responses Explorer folder view.
2. Search the responses database by typing in the Search and Filter field.

Responses Explorer

The screenshot shows the 'Responses' tab selected in the top navigation bar. On the left, there is a tree view of folder categories. A folder named 'Financial service' is expanded, showing its sub-folders: 'Errors in transactions', 'First contact', and 'Wrong amount'. The 'First contact' folder is highlighted with a blue background and a large number '1' in a circle to its right. A hand cursor is pointing at the 'First contact' folder. Below the tree view, a details area displays the subject 'Subject: First contact' and a preview of the response content: 'Dear <\$ Contact.FirstName+" +Contact.LastName \$>. Thank you for your recent inquiry about your last account statement. We are inves'. A large number '2' in a circle is to the right of the subject line, indicating the details view.

The Responses Explorer contains a tree view of folders (marked 1 in the image) and a details view (marked 2 in the image). The folders are the standard-response categories. Click a folder to open it.

Each folder contains one or more pages. Each page is a standard-response document related to the category. Click a response to preview it in the details area.

To insert standard-response text into the current interaction, click in the interaction message area to place an insertion point, select a response document, then click **Insert copy**.

To show or hide the responses details area, click **Show Detail/Hide Detail** .

Another way to insert a response into an interaction is to copy the content from the responses details area and paste it into the message area of your email or chat interaction.

Standard responses use code "tokens" (such as `{Name}`). When you insert a response that contains a token, the code is replaced with specific text. For instance, "Dear {Name}" becomes "Dear John Smith" in the email.

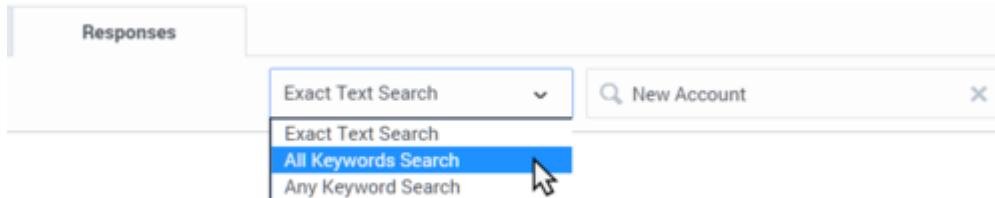
Tip

If you copy and paste token code (such as `{Name}`) into your draft email, the replacement happens only *after* you send the email. To review the replacement text before sending, you must click **Insert copy**.

Search and Filter

The Search and Filter area enables you to specify keywords to search for in the Standard Response Library. It has the following features:

- **Search field**—Enter the keyword for which you want to search, then click the magnifying-glass icon to initiate the search.
- **Search type**—A drop-down list that enables you to search using one of the following strategies:
 - **Any Keyword Search**—Find all responses that contain at least one of the specified keywords.
 - **All Keyword Search**—Find all responses that contain all of the specified keywords.
 - **Exact Text Search**—Find all responses that contain the specified keywords in the order in which they are specified.



Tip

The search is applied to the selected view; to clear the search criteria and display all contents, click the **X** in the search field.

How do I add or remove favorites?

Adding a Favorite

Agent Workspace might be set up to let you mark (add) and unmark (remove) standard responses as favorites. This feature makes it easy for you to find the responses that you use most often.

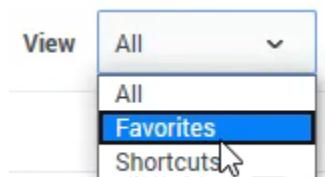
There are two ways to mark a response as a favorite:

1. In the **Responses** tab, find the response, select it, and then at the top of the tab, click **Add Standard Response into Favorite Responses** ().
2. In the **Responses** tab, find the response, and then to the left of the response name, click **Add Standard Response into Favorite Responses** ().

The screenshot shows the Agent Workspace interface. At the top, there is a header with a warning icon, 'Inbound Calls 0', and a user profile for 'Kristi Sippola'. Below the header, there are three tabs: 'Co-browse', 'Contact', and 'Responses'. The 'Responses' tab is selected. Under the tabs, there is a toolbar with buttons for 'Insert copy', 'View' (with dropdowns for 'All' and 'Favorites'), 'Exact Text Search', and a search bar. The main area is titled 'Responses' and contains a list of response items. The 'Brokerage' folder is expanded, showing its contents: 'Balance Alert', 'Loan Application Email Survey', 'Loan Confirmation' (which is highlighted with a star icon and has a cursor pointing at it), 'Vacation Bronze', 'Vacation Bronze 2', 'Vacation Gold', 'Vacation Silver', 'Web Support', 'Reminder', 'SAP_MWD', 'Sentiment', 'SentimentDetection', 'Survey emails', 'WebCallback notifications', and 'WebCallback notifications Tech Marketing'. The 'View' menu is open, showing options 'All' (selected) and 'Favorites' (highlighted with a blue background). The 'Favorites' option is also highlighted with a blue background in the list of responses.

Favorites Filter

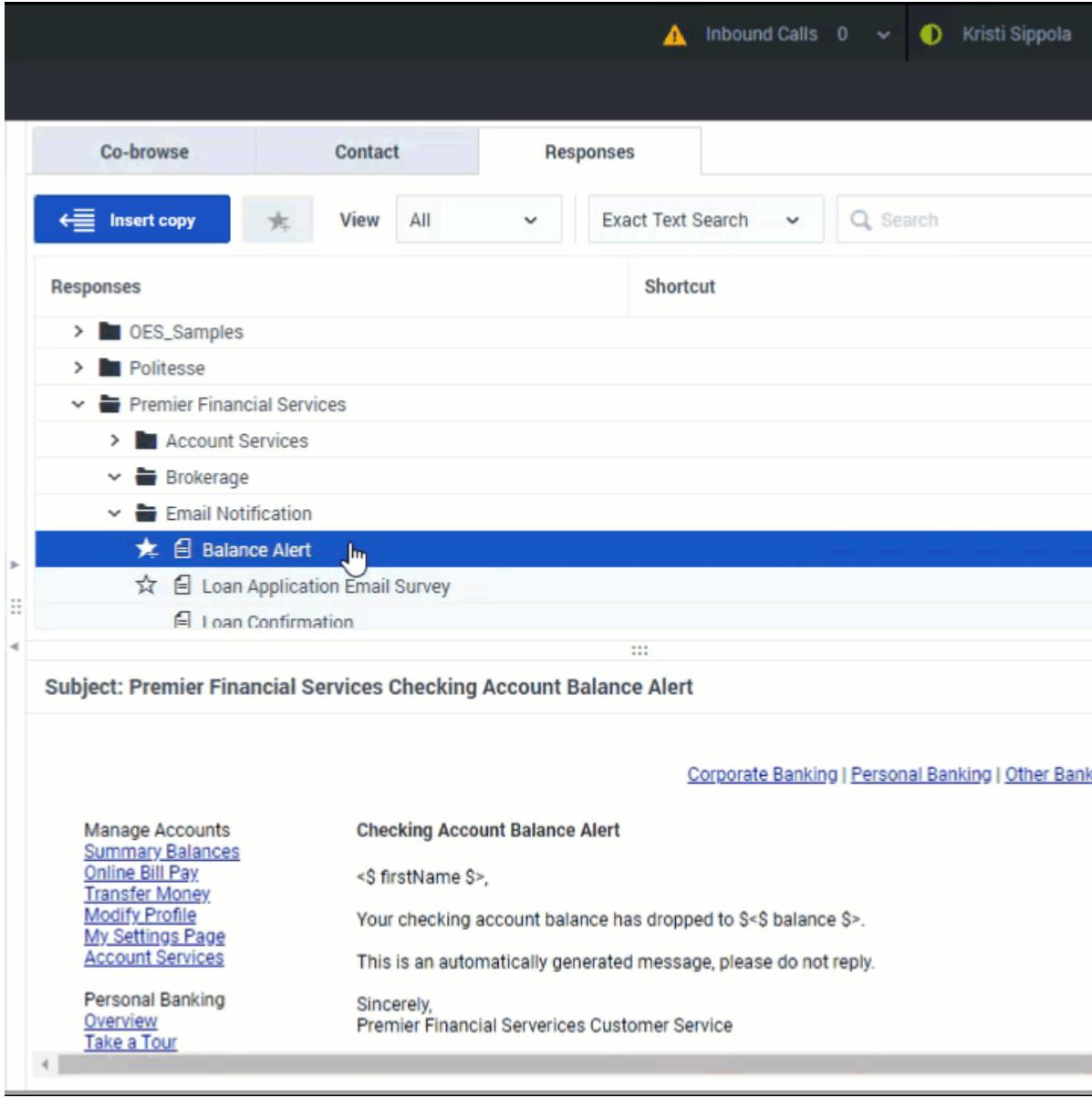
You can filter the **Responses** tab to show only those responses that you have marked as a favorite. In the **View** menu, select **Favorites** to view only your favorites or select **All** to view all responses.



Removing a Favorite

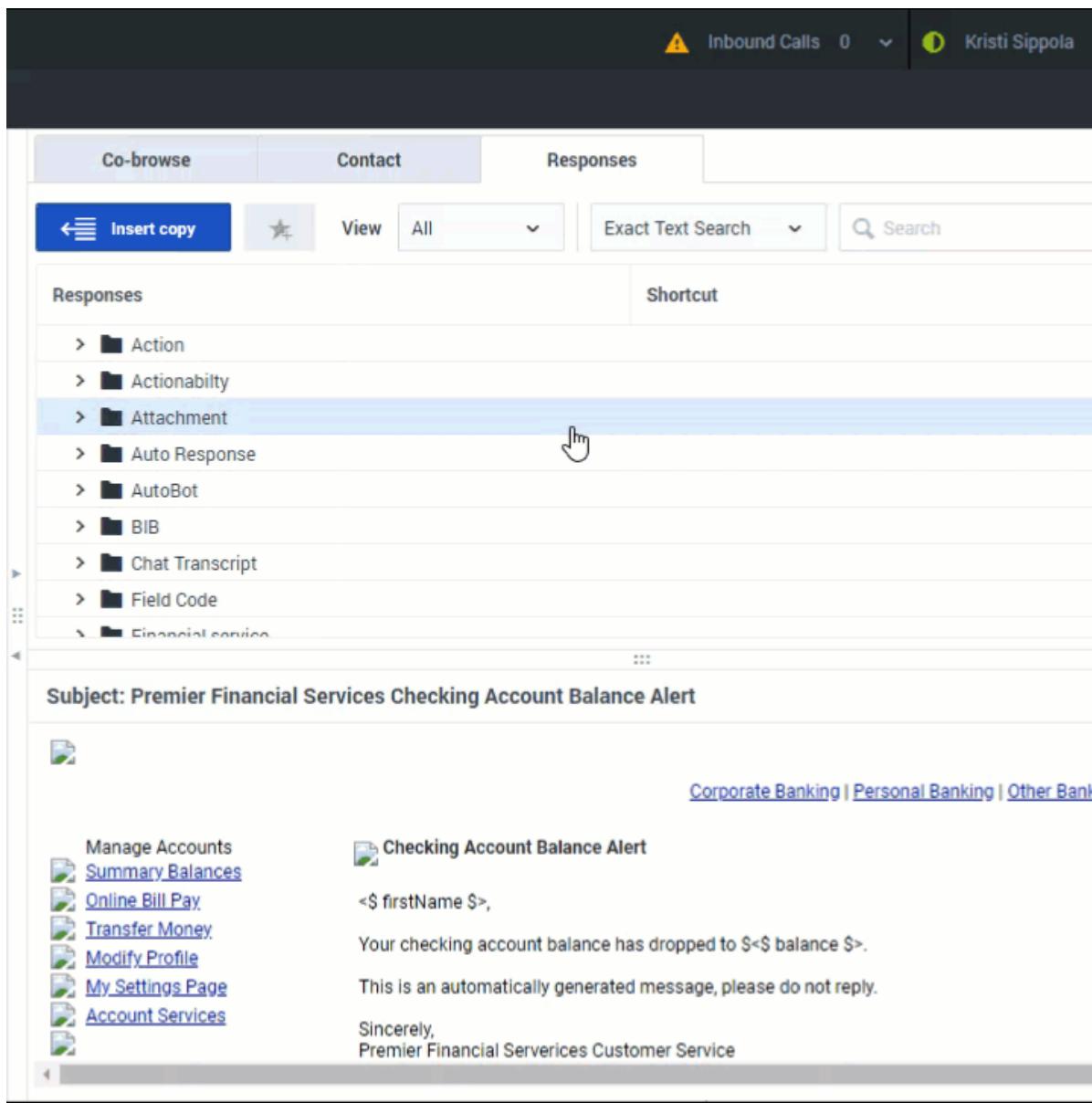
There are two ways to unmark a favorite response.

1. In the **Responses** tab, find the response marked as a favorite, then to the left of the response name, click **Remove** (★).



The screenshot shows the Agent Workspace interface. At the top, there is a header with an alert icon, 'Inbound Calls 0', and a user profile for 'Kristi Sippola'. Below the header, there are three tabs: 'Co-browse', 'Contact', and 'Responses'. The 'Responses' tab is selected. Under the 'Responses' tab, there is a toolbar with buttons for 'Insert copy', 'View' (set to 'All'), 'Exact Text Search', and a search bar. To the right of the toolbar is a 'Shortcut' button. The main content area is titled 'Responses' and shows a list of responses categorized under 'OES_Samples', 'Politesse', and 'Premier Financial Services'. The 'Premier Financial Services' category is expanded, showing 'Account Services', 'Brokerage', 'Email Notification', and 'Balance Alert'. The 'Balance Alert' response is selected and highlighted with a blue background. To the left of the response name is a star icon with a minus sign, indicating it is a favorite. Below the list of responses, there is a subject line: 'Subject: Premier Financial Services Checking Account Balance Alert'. At the bottom of the screen, there are links for 'Corporate Banking', 'Personal Banking', and 'Other Bank'. On the left side, there is a sidebar with links for 'Manage Accounts' (Summary Balances, Online Bill Pay, Transfer Money, Modify Profile, My Settings Page, Account Services), 'Personal Banking' (Overview, Take a Tour), and 'Checking Account Balance Alert' (with a message to the user). The 'Remove' button is located at the top of the 'Responses' tab, just to the left of the star icon.

2. In the **Responses** tab, open the **View** menu and select **Favorites**. The view will change to show only those responses you have marked as favorites. Select the favorite that you want to unmark, then at the top of the tab, click **Remove** (★).



The screenshot shows the Agent Workspace interface. At the top, there is a header with an 'Inbound Calls 0' status and a user profile for 'Kristi Sippola'. Below the header, there are three tabs: 'Co-browse', 'Contact', and 'Responses'. The 'Responses' tab is selected. Under the tabs, there is a toolbar with buttons for 'Insert copy', 'View' (set to 'All'), 'Exact Text Search', and a search bar. The main area is titled 'Responses' and contains a list of standard responses. One response, 'Attachment', is highlighted with a blue selection bar and a hand cursor icon pointing to it. The list includes: Action, Actionability, Attachment, Auto Response, AutoBot, BIB, Chat Transcript, Field Code, and Financial services. Below the list, a subject line 'Subject: Premier Financial Services Checking Account Balance Alert' is shown. To the left of the subject line is a small image icon. To the right is a link to 'Corporate Banking | Personal Banking | Other Bank'. On the left side of the subject line, there is a sidebar with 'Manage Accounts' and a list of links: Summary Balances, Online Bill Pay, Transfer Money, Modify Profile, My Settings Page, and Account Services. To the right of the subject line, there is a preview of the message content. The preview shows a thumbnail for 'Checking Account Balance Alert', a greeting '<\$ firstName \$>', a message about the account balance dropping, a note that it's an automatic message, and a signature from 'Sincerely, Premier Financial Services Customer Service'.

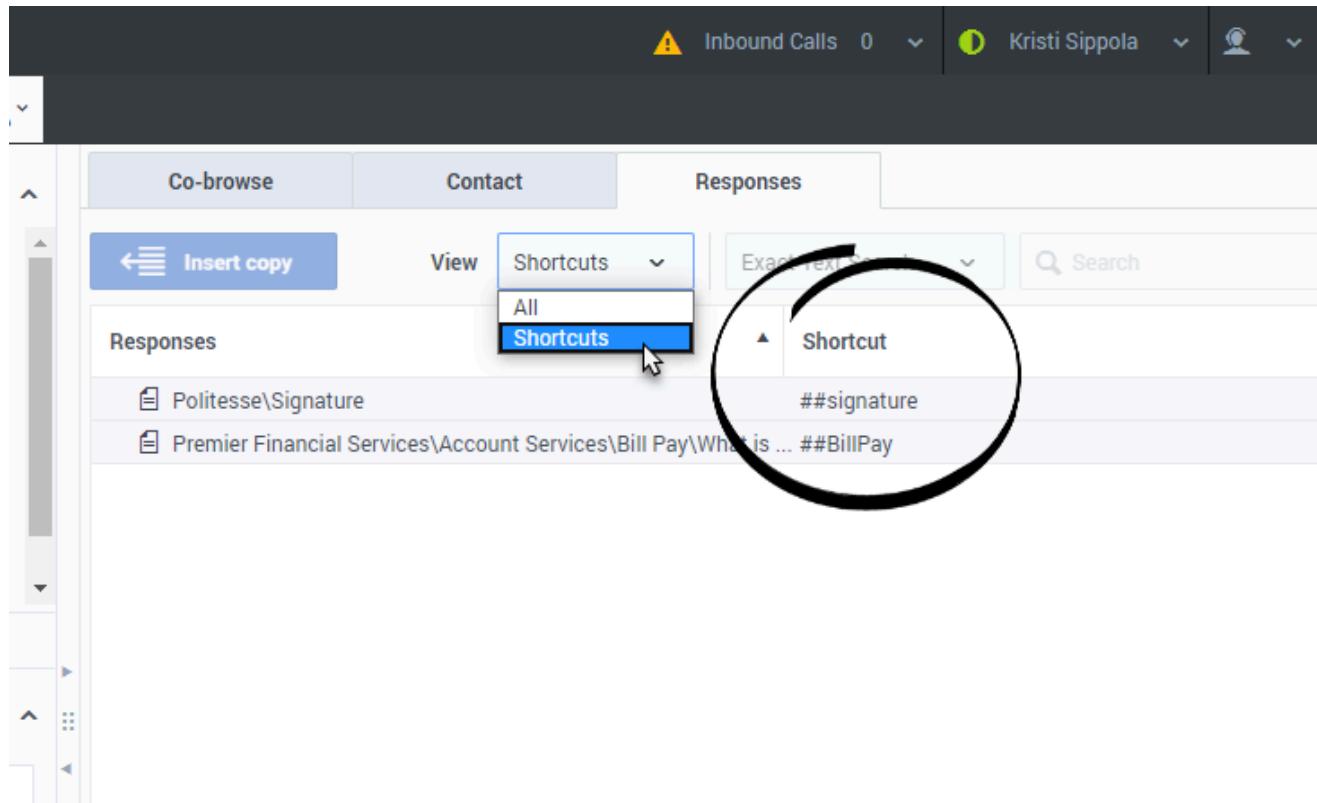
How do I use Standard Response Shortcuts?

[Link to video](#)

Your administrator might have created shortcuts that you can use to quickly find responses from the list of Standard Responses in the **Responses** view. If you already know the shortcut keyword, you can type it in the message field of a chat or email to automatically insert a response.

Shortcuts begin with a prefix, such as "#", followed by a keyword, such as "signature". In this example the shortcut you would type in the message field

would be "#signature" then press **Ctrl+Space** to insert the standard response in place of the shortcut.



Ask your supervisor or administrator whether shortcuts have been created for you and what they are.

The body of the standard response is added to the interaction for confirmation before you send it to your contact. You can modify the contents of a standard response after inserting it, but not after you send it.

If your company uses shortcuts, when you open the **Responses** tab a **Shortcut** column is displayed next to the **Responses** column. Each response that has a shortcut will have the full shortcut displayed in the shortcut column next to the name of the response.

If it is available in your environment, use the **View** drop-down menu to toggle the view between all responses and only those responses with shortcuts.

What next?

- Calls
- Chat
- Email

- Navigating Agent Workspace

Top 5 topics

1. Getting Started
2. Navigating Agent Workspace
3. Calls
4. Contacts
5. Contact and interaction history