Webex Engage Admin and Setup Guide for Webex Contact Center

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Contents

1. About New Digital Channels

Webex Contact Center supports new digital channels—SMS, Facebook Messenger, Livechat, Email, Apple Messages for Business (AMB) and WhatsApp—with enhanced capabilities. Digital channels enhance the reach of any business. With changing demographics and individual habits, consumers expect to reach out to a business through any channels of their choice. Businesses must be available through all the popular channels of communication.

2. New Digital Channel Consoles

The new digital channel administration portal is split into the following areas:

- Admin console–Administrators can manage tenant-wide configurations for digital channel offerings such as policies and channel asset configurations. In the Management Portal navigation bar, click New Digital Channels to launch the default console.
- Customer Care console–Primarily used to access past conversation transcripts and agent monitoring capabilities.

2.1. Admin Console

The following table describes the Admin Console components.

Component	Description
Dashboard	Displays information on chats traffic and workforce-related metrics.
Groups	Allows you to configure entry points to a workflow that invokes on the back of conversation lifecycle events, or manually triggered by your agents to invoke them on-demand during a conversation.
Settings	Enables tenant-wide configuration, such as attachment policies and email-related configuration.
Users	Presents a read-only view of users enabled with omnichannel access or licensed as a premium agent synced from Control Hub.
Assets	Enables configuration of channel assets and response templates (canned responses).

2.1.1. Dashboard

The real-time dashboard offers a glimpse into the inbound conversation traffic that the contact center is currently handling.

2.1.1.1. Groups

The Groups menu represents geographical sites. Although you can manage the sites from Control Hub, you can't sync these sites in the Admin Console. By default, the Admin Console has one preconfigured group called Default. The Default group contains all agents with premium agent licenses.

The following table describes the contents of the Groups menu:

Field Name	Description
Group name	Name of the group
Department	An alias to map the group to the physical org hierarchy
No. of teams	Number of teams within the group.
No. of group admins	Number of group admins within the group.

Note
You can't change a group name.

1.1.1.1.1 Teams

The Teams menu represents a group of people working in a particular function in a specific group (site), for example, Sales or Complaints. Although the Webex Contact Center Management Portal manages teams, the Management Portal doesn't sync teams. By default, the Admin Console has one team within the Default group called Default. All premium agent-licensed agents are mapped to the Default team.

Column Name	Description
Team logo	Displays the default logo.
Team name	Displays the name of the team that is set to Default.
Channels	Set to SMS, Facebook Messenger, Livechat, Email, Apple Messages for Business (AMB) and WhatsApp.
No. of managers	Displays the number of administrators that manage this team.
No. of agents	Displays the number of agents that are part of this team.

Column Name	Description
Others	Displays the number of users belong to other roles, such as Analyst, which aren't applicable to Webex Contact Center today.

When you click the team name link, you can view the following tabs:

- Users
- Events and Rules

Users

The Users table displays a read-only view of the users mapped to the Default team.

Column Name	Description
Name	Name of the user (<First Name> <Last Name) as configured in Control Hub
Login ID	User's Login ID – Set to Cisco CI User ID. Note This has no bearing on the way users log in to Webex Contact Center.
Email	Email ID of the user as configured in Control Hub
Role	Role of the user that can be Client Admin or Agent.
Status	Status of the user on the Agent Desktop, such as active or inactive
Date	Date when the user was last active
Time	Time when the user was last active

Events and Rules

Events and rules allow you to post conversational data to trigger workflows or any HTTP APIs on external systems. Events allow your agents to trigger workflows on demand during an active conversation. The system triggers the rules on the back of various conversational lifecycle events.

Add a New Event

Procedure

Step 1

In the Management Portal navigation bar, choose New Digital Channels to launch the default console.

Step 2

Choose Groups > Events and Rules.

Step 3

Click Add New Event on the top-right corner of the screen.

The Configure Events page appears.

Step 4

Enter the Name of the event.

Step 5

Enter the URL in the given fields. The system calls this URL when the event is triggered.

Step 6

Choose one of the following methods:

- Get
- Put
- Post
- Patch
- Delete

Step 7

Set the type of response format in the Expected Response Format field to JSON.

Step 8

Check the Wait for Response check box, which disables retriggering the same event until a response is received from the target system.

Step 9

Check the Display Response on the Chat Console check box to enable the agent to see the target system response in the chat console.

Step 10

You can choose to pass the payload using either Key Value Pair or Custom Payload.

If you choose the Key Value Pair radio button, the key value pair settings appear on the screen.

Check the Form Encode Request Body check box to pass form encoded parameters in the request body.

Otherwise, you can configure the parameters and pass them in the API requests.

To add parameters, follow these steps:

a. Click Add Param.

   The Add Parameter pop-up window appears.

b. Choose Header/Query Param/Request Body from the Pass Through drop-down list.

c. Enter the Parameter Name.

d. Check the Mandatory Parameter check box if the system must use this parameter when triggering an event.

e. Choose the Value from the drop-down list.
f. When you choose the Custom Param as the value from the list, choose one of these radio buttons:
    - Allow agent to enter value manually: This option allows the agent to enter the values manually before calling an external URL to post the data.
    - Allow agent to choose from a set of predefined values: This option allows the agent to choose preconfigured values before calling an external URL to post the data. When you choose this radio button, a text box appears on the screen. Enter the predefined values in the text box.
g. Click the respective radio button and click Add to save the parameters.
h. Use the Edit and Delete icons, respectively, to edit and delete the parameters.

Add a New Rule

Procedure

Step 1

In the Management Portal navigation bar, choose New Digital Channels to launch the default console.

Step 2

Choose Groups > Events and Rules.

Step 3

Click Add New Rule on the top-right corner of the screen.

The Configure Rule page appears.

Step 4

Enter the Rule Name.

Step 5

Choose the condition from the Fire When drop-down list. The rules trigger automatically based on a certain preconfigured condition. The list includes the following conditions that are allowed in a Rule:

- Message arrives: Rule is triggered for an inbound message.
- Inbound message contains: Rule is triggered when an inbound message contains a configured word. On the selection of this condition, a text box is displayed. Enter the word (max 30 characters) in the given text field.
- Outbound message contains: Rule is triggered when an outbound message contains a configured word. On the selection of this condition, a text box is displayed. Enter the word (max 30 characters) in the given text field.

- Chat is closed: Rule is triggered when the chat is closed. Select an option, to trigger the rule Manually, By API, or By System. You'll need to choose By API for this rule to work on your tenant.
- Chat created: Rule triggers automatically when a chat is created. A post request can be made (third-party URL), whenever a chat is created. You need to choose By API for this rule to work on your tenant.
- Chat reopened: Rule triggers when a chat is reopened. Select an option, to trigger the rule Manually or By API or By System. You'll need to choose By API for this rule to work on your tenant.
- Message sent: Rule triggers when a message is sent.

Step 6

Choose one of the following methods:

- Get
- Put
- Post
- Patch
- Delete

Step 7

Enter the URL to make a request in the given field when the event is triggered.

Step 8

Choose the type of response format in the Expected Response Format field as JSON.

You can choose to pass the payload using either Key Value Pair or Custom Payload.

If you select the Key Value Pair radio button, the key value pair settings appear on the screen.

Step 9

Check the Form Encode Request Body check box to pass the form encoded parameters in the request body. Otherwise, you can configure the parameters and pass them in the API requests.

Step 10

To add parameters, follow these steps:

a. Click Add Param.

   The Add Parameter pop-up window appears.

b. Choose Header/Query Param/Request Body from the Pass Through drop-down list.
c. Enter the Parameter Name.
d. Choose the Value from the drop-down list.
e. Click Add.

Step 11

Choose the Custom Payload radio button to pass the payload in JSON format.

The parameters should prefix with @@ and close in curly {} braces in the data field.

Step 12

Click Save Rule to save the configured rule.

Step 13

You can configure Rules through JavaScript code. To do this, turn on the On/Off JavaScript Rule toggle on the top-right corner of the Configure Rule page.

Step 14

Click Save Rule.

Edit Events and Rules

Procedure

Step 1

In the Management Portal navigation bar, choose New Digital Channels to launch the default console.

Step 2

Choose Client Admin Console > Groups > Events and Rules.

Step 3

Click the Edit icon in the Actions column of an Event or Rule.

The Configure Event/Configure Rule page appears.

Step 4

Make the required changes.

Step 5

Click Save Event/Save Rule.

Delete Events and Rules

Procedure

Step 1

In the Management Portal navigation bar, choose New Digital Channels to launch the default console.

Step 2

Choose Client Admin Console > Groups>Events and Rules.

Step 3

Click the Delete icon in the Actions column of an Event or Rule.

A confirmation message appears on the screen.

Step

Click OK to delete the chosen Event or Rule.

2.1.2. Settings

Use Settings to manage tenant-wide configurations for the digital channel stream. You can configure the following parameters:

Field Name	Description
Enable attachments on Customer Care console	Use this toggle to enable or disable attachments on the Agent Desktop. Further, you can configure the allowable number of attachments, attachment sizes, and file formats.
Enable chat history in agent replies	Turn on the Enable chat history in agent replies on email channel toggle to allow agents to send chat history in their replies (Not applicable to Webex Contact Center)
Account Dormancy	Users are marked as Dormant if they don't attend any digital channel contacts for consecutive 30 days.

2.1.3. Users

The Users section displays a read-only view of users that are mapped to a premium agent license. If any users mapped to a premium agent license are not listed here, resynchronize users manually using Control Hub.

Note

The synchronized list of users doesn't include the current logged in user or administrator.

2.1.4. Assets

This section covers the following:

- Channel Assets
- Configure Livechat widgets

2.1.4.1. Channel Assets

Channel assets are business entry points for your customers to reach out to the business contact center. Channel assets registered with Webex Contact Center from the Webex Connect application appear here. If you do not see your asset, such as SMS number, Facebook Messenger page, Livechat App, Apple Messages for Business (AMB), WhatsApp, or Business Email Account in the Assets page, check the registration status of the asset on the Webex Connect application and ensure that it states *Registered on <timestamp>*.

Note

- When an administrator deletes assets on Webex Connect, those assets will no longer appear on the Control Hub or Webex Engage Assets screen.
- Don't edit any asset details directly on the Channel Assets page except the Livechat widget configuration.

When you click the Channel Assets icon on the left menu, you see a list of current channel assets registered with Webex Contact Center. Each tab displays the channel and contains the channel assets.

Column	Description
Channel	Name of the user (<First Name> <Last Name>) as configured in Control Hub
Asset Details	Business address of the asset, such as SMS number, WhatsApp number, Apple Messages for Business or Facebook page link
Asset Name	Name of the asset as configured on the Webex Connect application
ID	Internal ID generated for the asset by Webex Contact Center
Added on	Timestamp when the asset was registered with Webex Contact Center
Priority	Default priority that applies to the channel asset (currently not applicable to Webex Contact Center)
Action	Edit

2.1.4.2. Configure Livechat Widgets

The Livechat channel enables businesses to engage and support their website visitors and customers.

Customers can initiate a conversation with the contact center using the Livechat widget.

Before you begin

The Livechat channel assets must be created in the Webex Connect application.

Procedure

Step 1

In the Management Portal navigation bar, choose New Digital Channels to launch the default console.

Step 2

Choose Assets > Channel Assets.

Step 3

Click the Livechat tab.

Step 4

Click the Edit icon in the Action column of a Livechat asset.

Step 5

Configure the General Settings tab:

a. Choose Default Team from the Default team drop-down list.
b. Ensure the Show chat conversation history to the end user on re-login toggle is disabled.
   This toggle controls to show or hide chat conversation history to customers on revisiting the website.
c. Turn on or off the Allow customer to request for chat transcript from Livechat widget toggle to enable or disable customers to request a chat transcript from the Livechat widget.
   - You can configure the agent name or generic alias in the chat transcript as the agent identifier to protect the agents' privacy.
d. Turn on the Clear threads at end user's widget toggle to clear chats when customer clicks End chat, or navigates to a different website, or closes the browser.
e. You can configure either an agent name or generic alias in the chat transcript as the agent identifier to protect the privacy of agents.
f. Ensure that the Close chats on the server upon chat abandonment toggle is disabled. This toggle instructs the application to automatically close chats on the server when customers abandon the chats. This feature doesn't apply yet to Webex Contact Center tenants.
g. Enable the Notification sounds toggle to play a chime sound when the end user receives a new

message.

h. Enable the Suppress Working Hours and Agent Present Checks toggle to make the Livechat widget available 24X7 regardless of the team is out of scheduled working hours or no agents are available.
i. Click Save Changes.

Step 6

Configure the Websites tab:

a. Click Add Website.

   The Website Settings page appears.
b. In the General tab, configure the following fields.

Field Name	Description
Chat Widget Language	Choose a language from the Chat Widget Language drop-down list. The default language is English. All announcements, action button text, error notifications, and chat transcripts display in the configured language on the widget.
Display Name	Enter the name that appears on the header of the widget.
Byline Text	Enter the support text that appears below the header.
Button Text	Enter the call-to-action (CTA) button name. The maximum number of characters allowed in the button text field is 30.
First Message	Enter the message that a customer views on the widget.
PCI Compliance Banner Message	Enter the message that a customer views when the message is not PCI-compliant.
Domain	Enter the domain name or subdomain name on which the widget must appear.

c. In the Set Wait Time section, set an approximate wait time that customers see when they reach out on the widget.

   Turn on the Display Approximate Wait Time toggle and click one of the following radio buttons:
   - Typically replies in a few minutes.
   - Typically replies in a few hours.
   - Typically replies in a day.
d. In the Set Chat Announcement section, turn on the Allow logging of chat announcement toggle to

configure personalized announcements on the widget.
Compose the announcement using $(agent) and $(team) as variables in the text field. This announcement appears when an agent sends the first outgoing message from the chat console. This field accepts all Unicode characters. The maximum character limit for the chat announcement field is 100 characters.

e. In the Email Transcript section, enter the following details.

Field Name	Description
Subject	You can configure the Livechat transcript subject using $(transdate) and $(brandname) parameters. The subject will render in the configured language mentioned in the Subject field under the Email Transcript section. The maximum character limit for this field is 100.
Footer	You can configure the footer in the language you wish to render in the Email Transcript by entering the required footer text in the Footer field under the Email Transcript. The maximum character limit for this field is 1000.

f. Click Save Changes.
This activates the Appearance and Widget Visibility tabs.

g. In the Appearance tab, configure the following fields.

Field Name	Description
Widget Color	Enter the Color Code for the widget. You can choose a color or provide a hex code.
Widget Button Type	Choose a chat widget button design that appears on your website.
Logo	Upload a graphic file with your logo.
Message Composer	configure the following settings on the Livechat message composer: Show composer when quick replies are sent: You can turn on this toggle to allow agents to compose new message in the composer if the suggested quick replies don't match the customer's intent. Show composer when carousels are sent: You can turn on this toggle to allow users to compose new message in the composer when a carousel is sent. Allow Emojis: You can turn on this toggle to allow customers to use emojis during the

Field Name	Description
	conversations on the widget. A default emoji list is provided on the widget. The customers can use any of the emojis available in the default list to communicate with the agents. Allow Attachments: You can turn on this toggle to allow customers to send attachments during the conversations on the widget. Note If you choose the PCI compliance option to drop attachments, the system overrides the Allow Attachments configuration.

h. Click Save Changes.

i. In the Widget Visibility tab, define the visibility of the widget on the website.
   - Click the Show without any restrictions radio button to show the widget all the time, regardless of any restrictions set for the widget visibility.
   - Click the Show with an OOO Banner radio button to show the widget with an out of office (OOO) banner message. You can configure the OOO message in the message composer text box.
     The maximum length of a banner is 75 characters.
     Banners don't accept < and > parameters.
   - Click the Hide completely radio button to hide the widget completely.
   - Turn on the Website Force Turn Off toggle to force turn off the Livechat widget. Configure the following settings:
     - In the Unavailability Banner Message text field, enter a message about the unavailability of the widget. The system displays this message to the customers who try to access the widget.
     - Turn on the Hide widget for new customers or when existing customers refresh the browser toggle to hide the widget for the new customers without displaying the banner message.
       Existing customers can view the banner message when they refresh their browser.

j. Click Save Changes.
   When you save this change, the existing customers can continue chatting. If the customer exits the conversation and clicks the list of threads, or tries to view or refresh the web page, the system hides the widget.
   Any action on the Force Turn Off toggle is displayed to the customer without refreshing the

browser.

Any changes that you make in the widget settings reflect only after the customers refresh the web page.

k. In the Banned Customers tab, you can ban customers from reaching out to agents on the Livechat widget. You can configure their IP addresses in the banned customer's list.

   To add banned customer IP Addresses:

   a. Click Add IP on the banned customer’s screen.
   b. Enter IP Start Range, IP End Rage, and Reason for banning a customer in the respective text boxes.
   c. Click Submit.

   A success message appears on the screen, and the system lists the IP details on the banned customer’s screen.

l. To edit a banned customer IP address:

   a. Click the Edit icon in the Actions column of a specific customer.
   b. Edit the required fields.
   c. Click Save Changes.

   To delete a banned customer IP address, click the Delete icon in the Actions column of a specific customer.

m. Configure the Installation tab:

LiveChat cookies consent

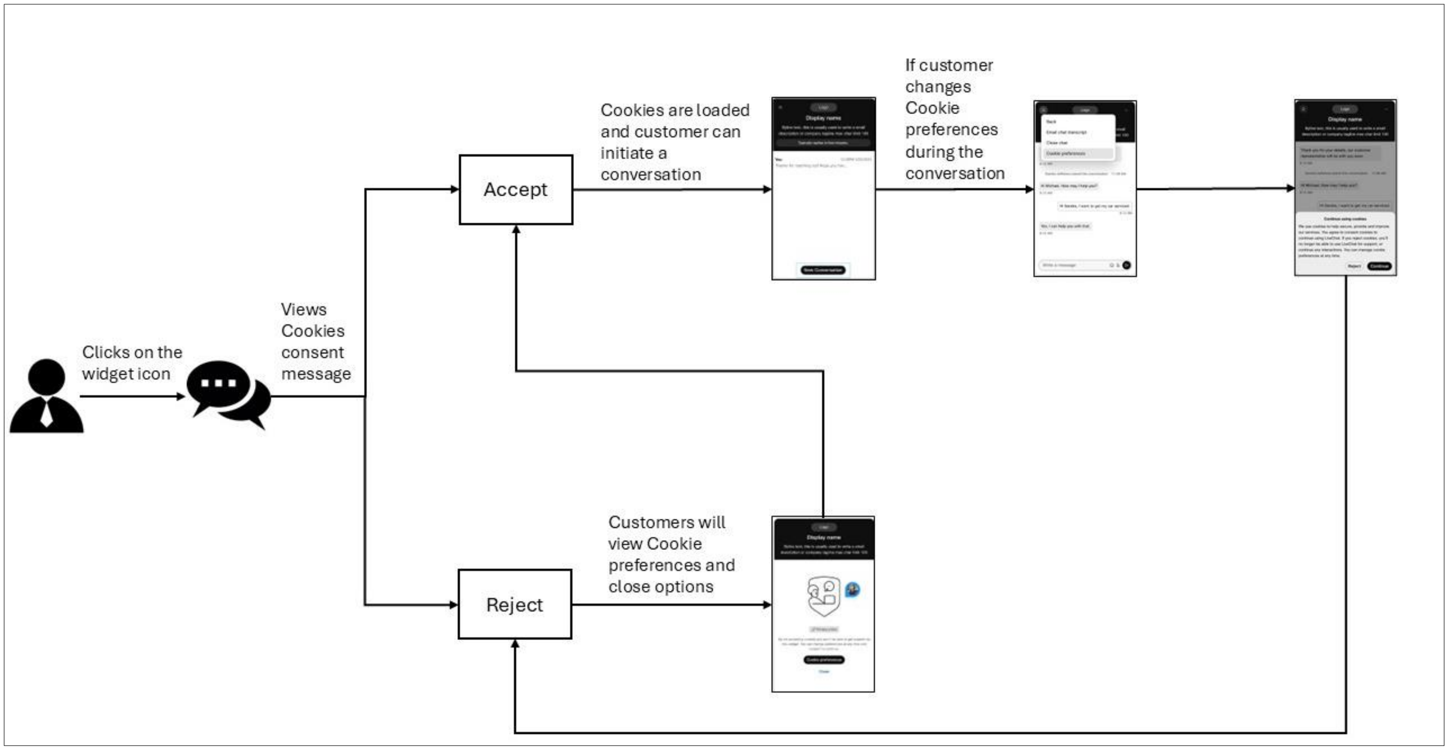
   a. Turn on the Take consent from the customer toggle to take manual consent from customers on Livechat widget.
   b. Click Copy to copy the widget script.
   c. Paste the script above the </body> tag in the HTML DOM.

   Note:

   - We strongly advise against modifying the installation script of our Livechat widget within the client’s code except for the Consent message and button labels. It is essential to embed the script exactly as provided, placing it beneath the body tag to ensure optimal functionality and to avoid potential conflicts with the parent site.

Customer experience on the Livechat widget

If Take consent from the customer setting is enabled for an asset, the customers will navigate through the following journey:



Note: End customers will see a weak network connection banner on the Livechat widget when the connection drops.

2.1.5. Templates

You can preset responses that agents can use when they respond to customer queries. You can set up the responses in Templates, and group them in a Template Group to organize the content and make the templates easier to find.

2.1.5.1. Add a Template Group

Procedure

Step 1

In the Management Portal navigation bar, choose New Digital Channels to launch the default console.

Step 2

Choose Assets>Templates.

Step 3

Click the + icon beside the Template Groups table header.

Step 4

In the Group Name field, enter the template group name. You can enter a maximum of 35 characters.

Step 5

Click Add.

2.1.5.2. Delete a Template Group

Step 1

In the Management Portal navigation bar, choose New Digital Channels to launch the default console.

Step 2

Choose Assets>Templates.

Step 3

Click the delete icon beside the template group name.

Step 4

Click OK to delete the template group and all the templates stored in the group.

2.1.5.3. Upload Templates

Use the Upload Templates feature to perform bulk upload of templates. Bulk upload reduces the time taken to create templates for individual widgets.

Procedure

Step 1

In the Management Portal navigation bar, choose New Digital Channels to launch the default console.
Step 2

Choose Assets>Templates.

Step 3

Click Upload Template.

Step 4

Click the Download sample file here link to download the sample .csv file.

Step 5

Rename the sample file with a unique name.

Step 6

Open the sample file and enter the following details in the corresponding cells:
Note

All fields in the sample file are mandatory.

Don't edit or change the column header names. Ensure the team names are comma-separated in the TeamNames column.

- Channel: Enter the name of the channel such as All, Facebook, SMS, Email, Livechat, Apple Messages for Business (AMB), or WhatsApp.
- TemplateGroup: Enter the name of the template group.
- TemplateName: Enter the name of the template.
- Text: Compose the template text as per the configured character limit for each channel template.

Template Type	Maximum number of characters
All	320
SMS	320
Facebook Messenger	2000
Livechat	1000
Email	No limit
WhatsApp	4096
Apple Messages for Business	10000

Note

- The file size must not exceed 5 MB, with a maximum number of 1000 templates per sheet.

- The Text column supports all Unicode characters.
- Use the Pipe symbol (|) as a delimiter to enter multiline text in the Text column.
- In the upload templates file, even if a single record ends with a delimiter (|), all the records in that file must end with the same delimiter.
- Locked: Enter Yes to lock the template or No to keep it unlocked.
- TeamNames: Enter the team names as comma-separated values. More than one team name means the templates are shared across the configured teams.

Step 7

Delete the help notes in the .csv file before you upload it.

Step 8

Save the file.

Step 9

Click Upload File. Upload the file only in .csv format.

Step 10

Click Track Upload Status to view the status of the files that you uploaded.

a. In the Show Activity Between field, choose a date range and click Apply.
b. Click Search to view all the files you uploaded during the chosen period.
c. Optionally, enter a filename in the Search field to filter the table results.
d. The Status column shows the status of the uploaded file as Completed, Completed with errors, or Failed.

Step 11

If the status is Completed with errors or Failed:

a. Click Download Report in the Action column.
b. Fix the errors in the file based on the report's findings.
c. Return to Step 9 to upload the file again.

2.1.5.4. Add a Template

You can choose to create a common template for all channels or create channel-specific templates. You can create templates for the following channels:

- SMS
- Facebook Messenger
- Email
- Livechat
- WhatsApp
- Apple Messages for Business (AMB)

1.1.1.1.2 Create a Common Template

You can create a common template for all channels.

Procedure

Step 1

In the Management Portal navigation bar, choose New Digital Channels to launch the default console.

Step 2

Choose Assets > Templates.

Step 3

Click Add Template.

Step 4

Click All to create a universal template for all channels.

Step 5 In the Template Name field, enter the name of the template.

Step 6 (Optional) In the Sender ID field, enter the sender ID.

Note

The default Sender ID (a short code assigned to the team if SMS is enabled as a Channel) loads automatically when you create a template. This feature allows you to create and track the templates.

Step 7 In the Template text field, enter the text.

Note

- The Template text field supports a maximum of 320 characters.
- Custom Fields: Enter custom or editable fields in the template body using chevron(\<>) brackets. Custom fields are editable fields even in locked templates.

- System Parameters: Click the @@ icon or type @@ in the Template Text field to view the list of system parameters. You can choose any of these parameters and compose the template text. When you use these parameters in the template text, the corresponding values are dynamically substituted when an agent selects these templates in a conversation.
  Note
  In the absence of relevant values for the configured parameters, the application renders the parameters in chevron braces and highlights them in yellow.

Step 8

Select the Lock Template checkbox to lock Text templates. Agents can edit only custom or dynamic fields when you lock a template.

Step 9

In the Team excluded field, select teams you don't want to share the template with.

Step 10

Click Save Changes to save the template.

1.1.1.1.3 Create an SMS Template

Procedure

Step 1

In the Management Portal navigation bar, choose New Digital Channels to launch the default console.

Step 2

Choose Assets>Templates.

Step 3

Click Add Template.

Step 4

Click SMS to create an SMS template.

Step 5 In the Template Name field, enter the name of the template.

Step 6 (Optional) In the Sender ID field, enter the sender ID.

Note

The default Sender ID (a short code assigned to the team if SMS is enabled as a Channel) loads automatically when you create a template. This feature allows you to create and track the templates.

Step 7 In the Template text field, enter the text.

Note

- The Template text field supports a maximum of 800 characters.
- Custom Fields: Enter custom or editable fields in the template body using chevron(\<>) brackets. Custom fields are editable fields even in locked templates.
- System Parameters: Click the @@ icon or type @@ in the Template Text field to view the list of system parameters. You can choose any of these parameters and compose the template text. When you use these parameters in the template text, the corresponding values are dynamically substituted when an agent selects these templates in a conversation.

  Note

  In the absence of relevant values for the configured parameters, the application renders the parameters in chevron braces and highlights them in yellow.

Step 8

Select the Lock Template checkbox to lock Text templates. Agents can edit only custom or dynamic fields when you lock a template.

Step 9

In the Team excluded field, select teams you don’t want to share the template with.

Step 10

Click Save Changes to save the template.

1.1.1.1.4 Create an Email Template

Procedure

Step 1

In the Management Portal navigation bar, choose New Digital Channels to launch the default console.

Step 2

Choose Assets>Templates.

Step 3

Click Add Template.

Step 4

Click Email to create an Email template.

Step 5

In the Template Name field, enter the name of the template.

Step 6

In the Template text field, enter the text.

- You can add emojis to the customized text. You can apply the rich formatting styles to the text as described in the table.

Icon	Description
Bold	Bolds the text.
Italics	Italicizes the text.
Underline	Underlines the text.
Strikethrough	Strikes the text.
Font color	Changes the font color.
Ordered list	Creates an ordered list.
Unordered list	Creates an unordered list.
Link	Inserts a hyperlink on the text selected.
Paragraph (Headings)	Applies preset heading or paragraph styles to the text.
Table	Inserts a table.

Note

- Custom Fields: Enter custom or editable fields in the template body using chevron(\<>) brackets. Custom fields are editable fields even in locked templates.
- System Parameters: Click the @@ icon or type @@ in the Template Text field to view the list of system parameters. You can choose any of these parameters and compose the template text. When you use these parameters in the template text, the corresponding values are dynamically substituted when an agent selects these templates in a conversation.

  Note

  In the absence of relevant values for the configured parameters, the application renders the parameters in chevron braces and highlights them in yellow.

Step 7

Select the Lock Template checkbox to lock Text templates. Agents can edit only custom or dynamic fields when you lock a template.

Step 8

In the Team excluded field, select teams you don’t want to share the template with.

Step 9

Click Save Changes to save the template.

1.1.1.1.5 Create a Livechat Template

Procedure

Step 1

In the Management Portal navigation bar, choose New Digital Channels to launch the default console.

Step 2

Choose Assets>Templates.

Step 3

Click Add Template.

Step 4

Click Livechat to create a Livechat template.

Step 5 In the Template Name field, enter the name of the template.

Step 6 In the Template text field, enter the text.

Note

- The Template text field supports a maximum of 2000 characters.
- Custom Fields: Enter custom or editable fields in the template body using chevron(\<>) brackets. Custom fields are editable fields even in locked templates.
- System Parameters: Click the @@ icon or type @@ in the Template Text field to view the list of system parameters. You can choose any of these parameters and compose the template text. When you use these parameters in the template text, the corresponding values are dynamically substituted when an agent selects these templates in a conversation.

  Note

  In the absence of relevant values for the configured parameters, the application renders the parameters in chevron braces and highlights them in yellow.

Step 7

Select the Lock Template checkbox to lock Text templates. Agents can edit only custom or dynamic fields when you lock a template.

Step 8

In the Team excluded field, select teams you don’t want to share the template with.

Step 9

Click Save Changes to save the template.

1.1.1.1.6 Create a Facebook Messenger Template

Procedure

Step 1

In the Management Portal navigation bar, choose New Digital Channels to launch the default console.

Step 2

Choose Assets>Templates.

Step 3

Click Add Template.

Step 4

Click Facebook to create a Facebook template.

Step 5

In the Template Name field, enter the name of the template.

Step 6 Choose Text as a template type to configure a Text template.

Note

- The Template text field supports a maximum of 2000 characters.
- Custom Fields: Enter custom or editable fields in the template body using chevron(\<>) brackets. Custom fields are editable fields even in locked templates.
- System Parameters: Click the @@ icon or type @@ in the Template Text field to view the list of system parameters. You can choose any of these parameters and compose the template text. When you use these parameters in the template text, the corresponding values are dynamically substituted when an agent selects these templates in a conversation.

  Note

  In the absence of relevant values for the configured parameters, the application renders the parameters in chevron braces and highlights them in yellow.

Step 7

Choose Action Templates as template type, to create button templates.

Note

You can use this option when the customer expects a quick response. The system sends the message with images and buttons to enable the customer to respond with a click of a button.

To configure action templates:

- Select the Button checkbox.
- Click Upload Image to browse and attach an image.
- In the Name field, enter the button name.
- Choose a Button type from the button type drop-down list.
- In the Call URL field, enter the call back URL.
- In the Template text field, enter the text.

  Note

  The Action templates support maximum of 320 characters.

Step 8

Choose Multimedia Templates as template type, to create various multimedia templates.

Note

You can create the following multimedia templates:

- Image
- Audio
- Video
- File

  To configure multimedia templates:

  - From the Media type drop-down, select a media type.
  - In the Enter Media URL, enter the URL.

Step 9

Select the Lock Template checkbox to lock Text templates. Agents can edit only custom or dynamic fields when you lock a template.

Step 10

In the Team excluded field, select teams you don't want to share the template with.

Step 11

Click Save Changes to save the template.

1.1.1.1.7 Create a WhatsApp Template

Procedure

Step 1

In the Management Portal navigation bar, choose New Digital Channels to launch the default console.

Step 2

Choose Assets>Templates.

Step 3

Click Add Template.

Step 4

Click WhatsApp to create a WhatsApp template.

Step 5 In the Template Name field, enter the name of the template.

Step 6 In the Template text field, enter the text.

Note

- The Template text field supports a maximum of 4096 characters.
- Custom Fields: Enter custom or editable fields in the template body using chevron(\<>) brackets. Custom fields are editable fields even in locked templates.
- System Parameters: Click the @@ icon or type @@ in the Template Text field to view the list of system parameters. You can choose any of these parameters and compose the template text. When you use these parameters in the template text, the corresponding values are dynamically substituted when an agent selects these templates in a conversation.

  Note

  In the absence of relevant values for the configured parameters, the application renders the parameters in chevron braces and highlights them in yellow.

Step 7

Select the Lock Template checkbox to lock Text templates. Agents can edit only custom or dynamic fields when you lock a template.

Step 8

In the Team excluded field, select teams you don’t want to share the template with.

Step 9

Click Save Changes to save the template.

1.1.1.1.8 Create an Apple Messages for Business(AMB) Template

Procedure

Step 1

In the Management Portal navigation bar, choose New Digital Channels to launch the default console.

Step 2

Choose Assets>Templates.

Step 3

Click Add Template.

Step 4

Click Apple Message for Business to create the AMB template.

Step 5

Enter Template Name.

Step 6

Choose a template type from the Template type drop-down list.

Note

You can create Text, Text with Attachment, Time Picker, List Picker, Rich Link, Quick Reply, and Form template types for the AMB channel.

Step 7

Choose Text as a template type to configure a Text template.

Step 8

In the Template text field, enter the text.

Note

The Template text field supports a maximum of 10000 characters.

Custom Fields: Enter custom or editable fields in the template body using chevron(\<>) brackets. Custom fields are editable fields even in locked templates.

System Parameters: Click the @@ icon or type @@ in the Template Text field to view the list of system parameters. You can choose any of these parameters and compose the template text. When you use these parameters in the template text, the corresponding values are dynamically substituted when an agent selects these templates in a conversation.

Note

In the absence of relevant values for the configured parameters, the application renders the parameters in chevron braces and highlights them in yellow.

Step 9

Choose Text with attachments as a template type to configure and support text with attachment templates.

Step 10

In the Upload Attachment section, click Choose File or Drop Files Here to upload an attachment.

Note

The Upload Attachment field supports a maximum limit of ≤ 5 MB.

Step 11

Select the Lock Template checkbox to lock Text and Text with attachment template types. Agents can edit only custom or dynamic fields when you lock a template.

Step 12

Choose the Time Picker template type to configure time slots for the customers.

- Configure Received Message preview.
    - Choose a Message preview bubble size from the Style radio buttons.
    - In the Title field, enter the title.
    - (Optional) In the Subtitle field, enter the subtitle.
    - Click Choose File or Drop Files Here to upload an attachment.
- (Optional) Configure Event Details.
- Enable the Pre-fill event details toggle to prefill event details.
    - In the Event title field, enter the title.
    - (Optional) In the Location details field, enter the location information.
    - (Optional) In the Show on map fields, enter the coordinates.
    - In the Time Slots fields, select date, time, and duration from the respective fields.
    - Click the Add icon, to add time slots further.
- Configure Reply Message preview.
    - Choose a Message preview bubble size from the Style radio buttons.
    - In the Title field, enter the title.
    - (Optional) In the Subtitle field, enter the subtitle.
    - Click Choose File or Drop Files Here to upload an attachment.

Step 13

Choose the Time Picker template type to configure a list of items and information regarding them.

- Configure Received Message preview.
  - Choose a Message preview bubble size from the Style radio buttons.
  - In the Title field, enter the title.
  - (Optional) In the Subtitle field, enter the subtitle.
  - Click Choose File or Drop Files Here to upload an attachment.
- Configure List Details.
  - In the Section title field, enter the title.
  - To configure multiple sections, select the Allow multiple selections for section checkbox.
  - Click Drop files here to upload, to upload image files.
  - In the Item Title field, enter the title.
  - (Optional) In the Item Subtitle field, enter the subtitle.
  - Click the Add icon adjacent to the Item name field to add multiple items.
  - Click Add Section to save the list.
- Configure Reply Message preview.
  - Choose a Message preview bubble size from the Style radio buttons.
  - In the Title field, enter the title.
  - (Optional) In the Subtitle field, enter the subtitle.
  - Click Choose File or Drop Files Here to upload an attachment.

Step 14

Choose the Rich Link template type, to configure and send rich links to the consumer device.

- Configure Received Message preview.
  - In the Title field, enter the title.
  - In the URL field, enter the rich link URL.
  - Select a media type from the drop-down list.

    Note

    - The media field supports Image or Video files.
    - When you select the Video as media type, upload the thumbnail image for easier identification and visibility. The video file must be in MP4 format.
  - Click Choose File or Drop Files Here to upload an attachment.

Step 15

Choose the Quick Reply template type to configure questions and options.

- In the Title field, enter the question.
- In the Add options field, enter the options.

Note

In the Add options field, you can configure a minimum two and a maximum of five options.

Step 16

Choose Form template type to configure rich, multi-page interactive flows for users on iOS and iPadOS devices using a single JSON payload.

- In the Description field, enter the form description to provide additional information to the agents using a form template.
- Click Load sample in editor to load a sample JSON and customize it, or you can enter a valid JSON.
- Click Beautify adjacent to the Load sample in editor to format and make the JSON readable.

Step 17

In the Team excluded field, select teams you don't want to share the template with.

Step 18

Click Save changes to save the template.

2.2. Customer Care Console

2.2.1. Dashboard

Use the dashboard to view the list of chats awaiting an agent's reply. The dashboard helps identify any waiting customers in the queue.

The dashboard contains the following tabs:

- Conversations
- Workforce

2.2.1.1. Conversations

You can view the open conversations count under the Conversations tab. The open conversation count is the total count of chats in the Queue, Active, and On Hold status of a particular team. You can view each status on its own card to see the specific chat count for that status. You can click on each of these cards to view the details of the chats under the selected status.

Note

Webex Contact Center doesn't support the On Hold status.

The active status card groups chat with those waiting for agent responses and those waiting for customer responses.

Based on the status card selection, you can view chat details such as chat ID, customer ID, priority, agent ID, average response time, handle time, and last updated on.

View Conversation Transcript

By default, the digital channel users can view the latest six months live data on the UI and via API. If you want to view data beyond six months, contact the support team. The support team can provide up to 24 months of data offline.

Procedure

Step 1

In the Management Portal navigation bar, choose New Digital Channels to launch the default console.

Step 2

Click the Switch to Customer Care button at the top-right corner of the dashboard.

Step 3

Click the Chat Log icon in the Action column of a chat.

The chat log dialog box appears on the screen.

Search Chats Based on Specific Filters

Procedure

Step 1

In the Management Portal navigation bar, choose New Digital Channels to launch the default console.

Step 2

Click the Switch to Customer Care button at the top-right corner of the dashboard.

Step 3

Click the Add Filter button on the dashboard screen.

Step 4

Create conditions on the Filter Chats screen.

Step 5

Click View Results to view chats that satisfy the filter conditions.

The search results table displays all the results that match the filter conditions.

Search and View Transcripts

Procedure

Step 1

In the Management Portal navigation bar, choose New Digital Channels to launch the default console.

Step 2

Click the Switch to Customer Care button at the top-right corner of the dashboard.

Step 3

You can search and view conversation transcripts in the Search page based on the following field values.

Field	Description
Name	Full name of the customer as received from the channel and configurations in the Create Conversation node in the flow. Applies to Facebook Messenger and Livechat channel. For email: set to the primary customer's email address (from address) by default. For SMS: set to the customer's mobile number by default. Note Partial searches are not supported. Search is case insensitive.
Mobile Number	SMS mobile number of the customer. Useful to search for SMS conversations.
Email ID	Email ID of the customer. Useful to search for email conversations.
Chat ID (Conversation ID)	Unique identifier of a conversation.
Livechat ID	A unique UUID–set on the customer's browser by the Livechat widget.
WhatsApp Mobile Number	Registered mobile number of the customer.
Apple Messages for Business (AMB)	Number or Email ID associated with the Apple ID.
Tags	Not applicable to Webex Contact Center
Priority	Not applicable to Webex Contact Center

Field	Description
Agent ID	Agent ID is configured to CI User ID as part of the initial phase and cannot be used in this phase.
Customer ID	Unique identifier of the customer as defined by the business. Not applicable to Webex Contact Center.

2.2.2. Blocklist Words

You can configure the blocked words that agents should refrain from using in the conversations. If these words appear in the customer's message, they are replaced with an asterisk (*) before they are sent to the agents. This feature supports English and the full range of Unicode characters that covers most languages in the world.

You can perform the following actions on this screen:

- Configure the blocked words that must be filtered out of the messages, or search for preconfigured blocked words.
- Configure Email IDs of the recipients to whom a report is sent if blocked words are found in the outbound messages that the agent tries to send to the customer.
- If the agent types a message that contains any of the blocked words, the system displays a warning, and it doesn't send the message until that agent removes that word.

Default Blocklist words

The following table lists the default blocklist words. You can make them active and inactive.

di	vag1na	cipa	fcuker	kumming	prick
ahole	vagiina	cl1t	fcuking	kums	pricks
arsey	vaj1na	clit	feck	kunilingus	pron
ash0le	vajina	clit licker	blow job	kwif	pube
ash0les	vullva	clitoris	fecker	l3i+ch	pusse
asholes	wankers	clits	felching	l3itch	pussi

Assface	wanks	clitty litter	fellate	labia	pussies
assh0le	wh00r	clusterfuck	fellatio	LEN	pussy
asslicker	wh0re	cnut	fingerfuck	lmao	pussy fart
asswipe	wigger	cock	fingerfucked	lmfao	pussy palace
bassterds	willie	cock pocket	fingerfucker	lust	pussys
bastards	wog	cock snot	fingerfuckers	lusting	queaf
bastardz	balls	cockface	fingerfucking	m0f0	queer
basterds	crap	cockhead	fingerfucks	m0fo	rectum
basterdz	fuck	cockmunch	fist fuck	m45terbate	retard
bitches!	50 yard cunt punt	cockmuncher	fistfuck	ma5terb8	rimjaw
bitches	5h1t	cocks	fistfucked	ma5terbate	rimming
bitches.	raji	cocksuck	fistfucker	mafugly	s hit
blobby	a_s_s	cocksucked	fistfuckers	masochist	s.o.b.
bollocks	a2m	cocksucker	fistfucking	masterb8	s_h_i_t
bolloks	a55	cock-sucker	fistfuckings	masterbat*	sadism
bollox	adult	cocksucking	fistfucks	masterbat3	sadist
bolox	amateur	cocksucks	flange	masterbate	sandbar
buttwipe	anal	cocksuka	flog the log	master-bate	sausage queen
c0cks	anal impaler	cocksukka	fook	masterbation	schlong

cntz	anal leakage	cok	fooker	masterbations	screwing
cock-head	anilingus	cokmuncher	fuck hole	masturbate	scroat
cuntz	anus	coksucka	fuck puppet	mof0	scrote
dive	ar5e	coon	fuck trophy	mofo	scrotum
dominatricks	arrse	cop some wood	fuck yo mama	mo-fo	semen
dominatrics	arse	cornhole	fuck	mothafuck	sex
dominatrix	arsehole	corp whore	fucka	mothafucka	sh!+
dumbass	ass	Cox	fuck-ass	mothafuckas	sh!t
fuckoff	ass fuck	cum	fuck-bitch	mothafuckaz	sh1t
fudge	asses	cum chugger	fucked	mothafucked	shag
Fukah	assfucker	cum dumpster	fucker	mothafucker	shagger
Fukin	ass-fucker	cum freak	fuckers	mothafuckers	shaggin
gayboy	assfukka	cum guzzler	fuckhead	mothafuckin	shagging
gayz	asshole	cumdump	fuckheads	mothafucking	shemale
h00r	assholes	cummer	fuckin	mothafuckings	shi+
h0ar	assmucus	cumming	fucking	mothafucks	shit
h0re	assmunch	cums	fuckings	mother fucker	shit fucker
hoe	asswhole	cumshot	fuckingshitmotherfucker	mother fucker	shitdick

hoor	autoerotic	cunilingus	fuckme	motherfuck	shite
hoore	b!tch	cunillingus	fuckmeat	motherfucked	shited
japs	b00bs	cunnilingus	fucks	motherfucker	shitey
jisim	b17ch	cunt	fucktoy	motherfuckers	shitfuck
jiss	b1tch	cunt hair	fuckwhit	motherfuckin	shitfull
joder	ballbag	cuntbag	fuckwit	motherfucking	shithead
kike	ballsack	cuntlick	fudge packer	motherfuckings	shiting
knobs	bang (one's) box	cuntlicker	fudgepacker	motherfuckka	shitings
knobz	bangbros	cuntlicking	fuk	motherfucks	shits
koon	bareback	cunts	fuker	muff	shitted
kunt	bastard	cuntsicle	fukker	muff puff	shitter
kunts	beastial	cunt-struck	fukkin	mutha	shitters
kuntz	beastiality	cut rope	fuks	muthafecker	shitting
Lezzian	beef curtain	cyalis	fukwhit	muthafuckker	shittings
masokist	bellend	cyberfuc	fukwit	muther	shitty
masstrbait	bestial	cyberfuck	fux	mutherfucker	skank
masstrbate	bestiality	cyberfucked	fux0r	n1gga	slope
masterbates	bi+ch	cyberfucker	gangbang	n1gger	slut
minge	biatch	cyberfuckers	gangbang	nazi	slut bucket

mother-fucker	bimbos	cyberfucking	gang-bang	need the dick	sluts
n1gr	birdlock	d1ck	gangbanged	nigg3r	smegma
nonce	bitch	damn	gangbangs	nigg4h	smut
orgasum	bitch tit	dick	gassy ass	nigga	snatch
packi	bitcher	dick hole	gaylord	niggah	son-of-a-bitch
packie	bitchers	dick shy	gaysex	niggas	spac
packy	bitches	dickhead	goatse	niggaz	spunk
paki	bitchin	dildo	god	nigger	t1tt1e5
pakie	bitching	dildos	god damn	niggers	t1tties
paky	bloody	dink	god-dam	nob	teets
peeenus	blow me	dinks	goddamn	nob jokey	teez
peeenusss	blow mud	dirsa	goddamned	nobhead	testical
peenus	blowjob	dirty Sanchez	god-damned	nobjocky	testicle
peinus	blowjobs	dlck	ham flap	nobjokey	tit
pen1s	blue waffle	dog-fucker	hardcoresex	numbnuts	tit wank
penis-breath	blumpkin	doggie style	hell	nut butter	titfuck
penus	boiolas	doggiestyle	heshe	nutsack	tits
penuus	bollock	doggin	hoar	omg	titt
Phuker	bollok	dogging	hoare	orgasim	tittie5

Phukker	boner	donkeyribber	hoer	orgasims	tittiefucker
polack	boob	doosh	homo	orgasm	titties
polak	boobs	duche	homoerotic	orgasms	tittyfuck
poof	booobs	dyke	hore	p0rn	tittywank
Poonani	boooobs	eat a dick	horniest	pawn	titwank
pr1c	btch1	eat hair pie	horny	pecker	tosser
pr1ck	xxx	ejaculate	hotsex	penis	turd
pr1k	moron	ejaculated	how to kill	penisfucker	tw4t
pussee	m0ron	ejaculates	how to murdep	phonesex	twat
puuke	$hit	ejaculating	jackoff	phuck	twathead
puuker	4r5e	ejaculatings	jack-off	phuk	twatty
queers	booooobs	ejaculation	jap	phuked	twunt
queerz	boooooooobs	ejakulate	jerk	phuking	twunter
qweers	breasts	erotic	jerk-off	phukked	v14gra
qweerz	buceta	f u c k	jism	phukking	v1gra
recktum	bugger	f u c k e r	jiz	phuks	vagina
scank	bum	f_u_c_k	jizm	phuq	viagra
sexy	bunny fucker	f4nny	jizz	pigfucker	vulva
sh1ter	bust a load	facial	kawk	pimpis	w00se

sh1ts	busty	fag	kinky Jesus	piss	wang
sh1tter	butt	fagging	knob	pissed	wank
sh1tz	butt fuck	faggitt	knob end	pisser	wanker
Shity	butthole	faggot	knobead	pissers	wanky
shitz	buttmuch	faggs	knobed	pisses	whoar
Shyt	buttplug	fagot	knobend	pissflaps	whore
Shyte	c0ck	fagots	knobhead	pissin	willies
skankey	c0cksucker	fags	knobjocky	pissing	willy
skanks	carpet muncher	fanny	knobjokey	pissoff	wtf
Skanky	carpetmuncher	fannyflaps	kock	poop	xrated
Slutty	cawk	fannyfucker	kondum	porn	T!T
slutz	chink	fanyy	kondums	porno	btch
twats	choade	fatass	kum	pornography	T T
va1jina	chota bags	fcuk	kummer	pornos	kill

Manage the Blocklist

Procedure

Step 1

In the Management Portal navigation bar, choose New Digital Channels to launch the default console.

Step 2

Switch to the Customer Care Console.

Step 3

Choose Settings > Manage > Blocklists.

The Default Blocklist section displays the default blocked words. You cannot delete these words, but you can activate and deactivate them.

Step 4

To deactivate a word:

a. Choose the word from the Active list.

   Optionally, use the search field to filter the list.

   Note

   You can choose multiple blocked words using the SHIFT key and inactivate them at once.

b. Click the Right Arrow icon to move the blocked word to the Inactive list.

c. Click OK to move the word from the Inactive to the Active list.

Step 5

To activate a word:

a. Choose the word from the Inactive list.

   Optionally, use the search field to filter the list.

b. Click the Left Arrow icon to move the blocked word to the Active list.

c. Click OK to move the word from the Inactive to the Active list.

Step 6

In the Custom Blocklist section, add your own list of words to the blocklist.

a. Enter the blocked word in the Enter word to blocklist field beside the Add Word button.

b. Click Add Word.

   The word is displayed in the text box. Similarly, you can configure any number of words.

Step 7

In the Escalations section, you can enable escalations.

a. Check the Escalations check box.
b. Enter comma-separated Email IDs in the text box. All the configured Email IDs are notified if blocked words occur in outbound messages.
c. Check the Allow the agent to unmask blocked words that appear in inbound messages check box to provide access permission to agents to unmask blocked words in inbound messages.

Step 8

Click Save Changes.

Note

It is mandatory to click Save Changes at the bottom-right corner of the screen to apply any actions performed on the blocklists screen.

For more information
Please visit cisco.com/c/en/us/products/contact-center