



WebACD Inbox User Guide

for Support Center

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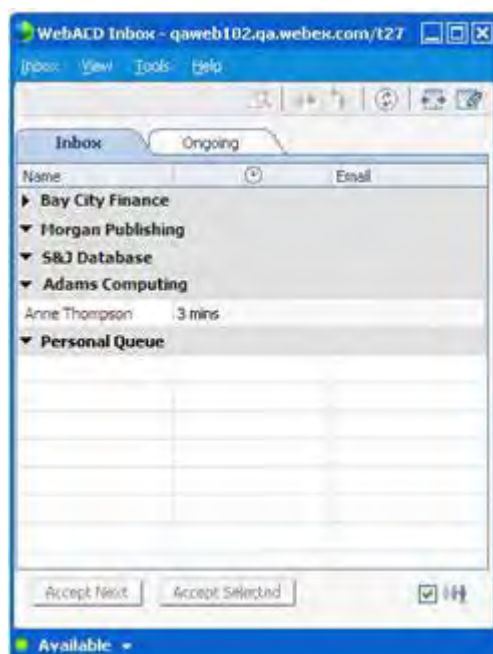
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Setting up WebACD Inbox

Using WebACD, you have quick and easy access to customer requests.

WebACD provides a number of tools that help you respond to requests from customers and clients. For instance, your site administrator may assign a pool of agents to a queue to handle questions about a product that has one or more features, or your site administrator can assign agents in one or more queues to support particular products.

Before you can begin to assist customers, you must first install and set up WebACD Inbox.



- Download WebACD [More...](#) (on page 2)
- Set up your accounts [More...](#) (on page 2)
- Set your global and individual preferences [More...](#) (on page 5)

Downloading WebACD

To download WebACD

- 1 Go to your WebEx Meeting Center site.
- 2 On the left navigation bar, under **Support**, click **Downloads**.
- 3 Under WebEx WebACD Inbox and Monitor, click **Download now**.
- 4 Follow the installation instructions.

The Account Setup window appears.



You do not need to enter http:// when you enter your site URL
[More...](#) (on page 2)

Entering your account information

WebACD uses your WebEx site URLs to identify you and route requests to you. The first time you download WebACD Inbox, you provide a URL and your username and password.

Your site administrator or manager supplies you with the details you need to get started in responding to requests in your assigned queues:

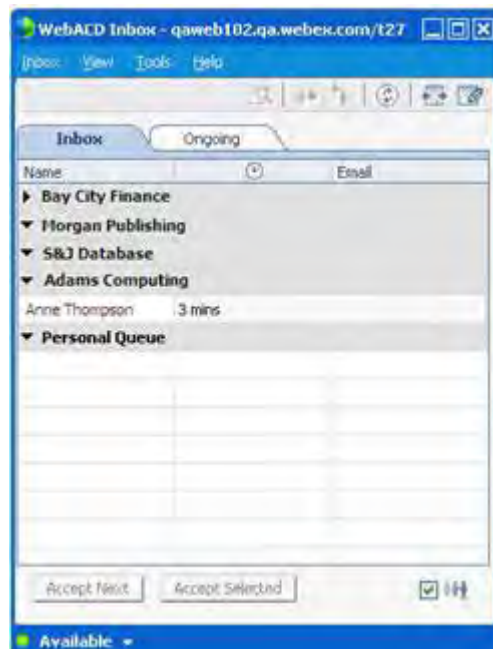
- account names (URLs) for the sites you work with
- your username
- your password

You enter this information once, your queues become available, and you are set up to handle calls immediately. Once you are in a session, other features allow you to invite a customer or another colleague to join the session, or to transfer the session to one or more agents.



You do not need to enter http:// when entering your site URL.

After you enter your site URL, username and password, you log in automatically to your WebACD Inbox.



As a WebACD agent, you can view incoming customer requests, and session activity on ongoing support sessions in queues assigned to you by your administrator.

- You can view incoming customer requests for your queues in the Inbox tab. [More...](#) (on page 4)
- You can view ongoing support sessions in the Ongoing tab. [More...](#) (on page 5)

Tip: As a shortcut to WebACD, you can double click the WebACD icon on the Windows taskbar to show one or more Inboxes:

- If you have only one Inbox, WebACD immediately shows it.
- If you have multiple Inboxes, WebACD displays a dialog box with a list of Inboxes.

Working with queues

As a WebACD agent, you can view incoming customer requests, and session activity on ongoing support sessions in queues assigned to you by your administrator.

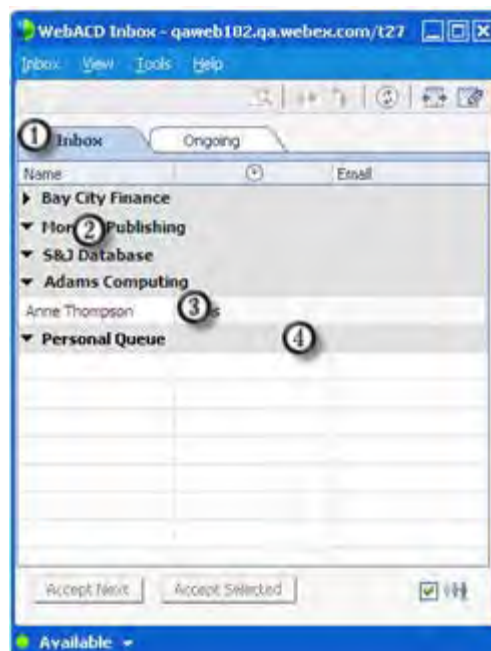
- You can view incoming customer requests for your queues in the Inbox tab. [More...](#) (on page 4)
- You can view ongoing support sessions in the Ongoing tab. [More...](#) (on page 5)

Viewing your assigned queues

The **Inbox** tab displays any incoming requests from customers waiting in your queues.

Incoming requests appear in two types of queues:

- Assigned queue—requests from customers to the support center. [More...](#) (on page 14)
- Personal queue—requests from customers to you personally. [More...](#) (on page 15)

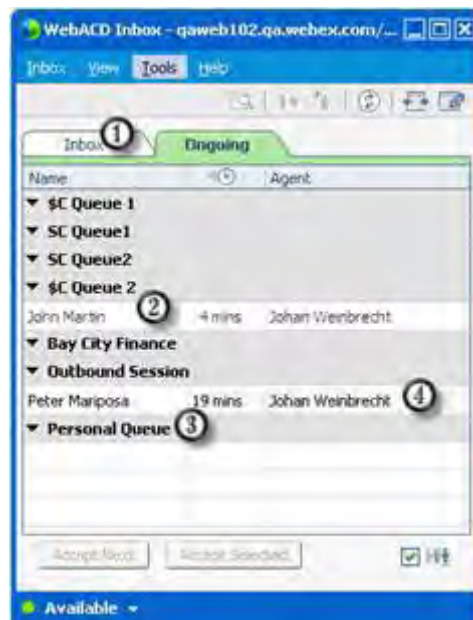


- ① Inbox tab
- ② List of assigned queues
- ③ Customer waiting in this queue
- ④ Your personal queue

Viewing ongoing support sessions

The **Ongoing** tab displays all customers in current support sessions for each queue assigned to you.

In addition, you can view current outbound support sessions—support sessions that are started by you or other representatives to contact and assist customers.



- ① List of assigned queues
- ② support session currently in progress in this queue
- ③ Your personal queue
- ④ Support session started by a representative to assist a customer

Setting your preferences

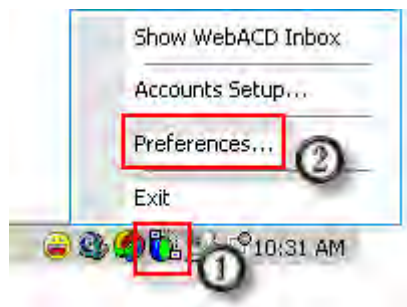
Set up WebACD to match your work style.

- With one or more inboxes, you can get a fast start by having having all inboxes launch when you start your computer, or you can start inboxes individually yourself. *More...* (on page 6)
- For each inbox you maintain, you can set individual preferences. *More...* (on page 6)

Setting global inbox start-up preferences

To set global preferences

- 1 Go to the Windows taskbar.
- 2 Right-click the **WebACD** icon.



- 1 WebACD Inbox icon on the Windows taskbar
- 2 Choose preferences

The Preferences dialog appears.



If you have elected to start WebACD automatically, you can specify what tools you want to show at startup.

WebACD saves your username and password and supplies them to the WebACD Inbox when you start your computer.

Setting individual Inbox preferences

If you want to set preferences for an individual WebACD inbox, open the Preference dialog box for that WebACD Inbox.

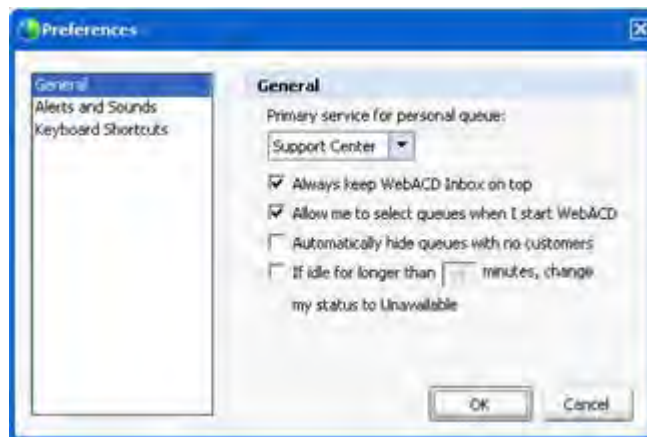
To set individual inbox preferences

- 1 On the menu bar of the WebACD Inbox, click **Inbox**, then choose **Preferences...**

The Preferences dialog box appears.

- 2 Select the preferences you want to include.

You can change your individual Inbox preferences at any time.



You can set individual Inbox preferences as follows:

- General [More...](#) (on page 7)
- Alerts and Sounds [More...](#) (on page 8)
- Keyboard Shortcuts [More...](#) (on page 8)

General Preferences

You can set the following general preferences for any individual WebACD Inbox:

Preference	Description
Primary service for personal queue	If your company uses WebACD for both Support Center and WebEx Sales Center sessions, select the service for which you will be monitoring queues.
Always keep WebACD Inbox on top	If you have a lot of applications open on your desktop, have WebACD move your Inbox so it is always on top and visible.
Allow me to select queues when I start WebACD	Select specific queues you want to view each time you start your Inbox. If you do not select this option, the Inbox shows the queues you selected the previous time you launched WebACD.
Automatically hide queues with no customers	Opt to see only queues with customers. If you select this option, and a customer joins a "hidden" queue, that queue becomes visible.
If idle for more than X minutes, change my status to Unavailable	Sets status to "Unavailable" automatically. If you forget to set your status manually (for example, "out to lunch" or "away from my desk"), the Inbox sets your status to unavailable on your behalf. Enter the number of minutes you want to wait before WebACD displays "Unavailable" as your status.

Alerts and Sounds Preferences

You can set alerts and sound preferences for any individual WebACD Inbox. These preferences take effect when a customer joins one of your queues.

Preference	Description
Blink window if minimized	Causes Inbox icon to blink. If you have minimized the Inbox, its icon blinks on the taskbar at the bottom of the desktop
Bring window to front	Displays your Inbox on top of other applications. If your Inbox is hidden behind other application windows, it appears on top of other windows.
Play sound	Select a sound to play each time a customer joins. Click Browse to select a different file. You must select a file with a .wav extension. Click the Play button to listen to the sound.

Keyboard Shortcuts preferences

Use the preset keyboard shortcuts or set your own.

To set keyboard shortcuts:

- 1 On the menu bar of the WebACD Monitor, click **Monitor**, then choose **Preferences**.

The Preferences dialog appears.

- 2 Click **Keyboard Shortcuts**.

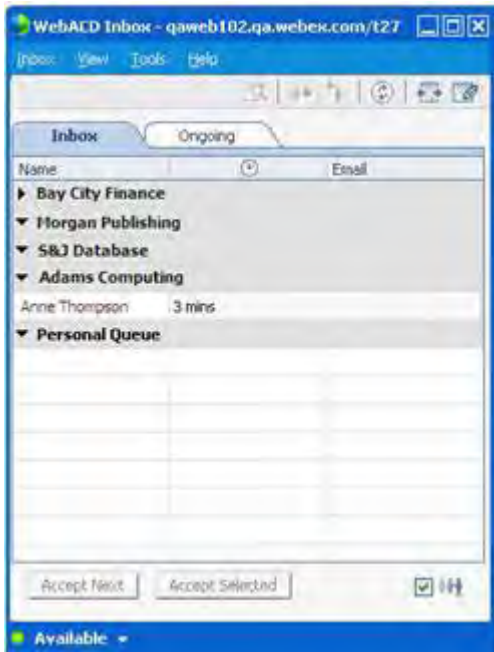
The Keyboard Shortcuts pane appears.

Preference	Description
Enable keyboard shortcuts	Use the key combinations (either preset or the alternative you have set) as shortcut keys.
Control	Use combinations of these special keys (the Ctrl, Alt, or Shift key) to form different shortcuts, if you do not want to use the preset key combinations.
Alt	
Shift	
	Type the letter or symbol in the box next to the Set Key button. Note You enable all or no shortcut keys.

Handling WebACD queues

WebACD Inbox is flexible in meeting your needs for viewing, managing, and monitoring your queues and service requests.

WebACD Inbox



What you can do

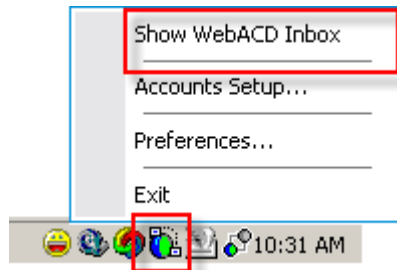
- receive customer requests automatically [More...](#) (on page 14)
- customize your view to see as much or as little customer details as you like [More...](#) (on page 16)
- use your personal queue to allow customers to reach you for follow-up assistance [More...](#) (on page 15)
- get help from another agent in assisting a customer [More...](#) (on page 17)
- transfer a request to another agent [More...](#) (on page 18)
- add additional WebACD Inboxes to manage requests from other sites (URLs) [More...](#) (on page 20)
- understand errors with accounts you have set up [More...](#) (on page 22)

Starting WebACD

If you chose not to have your Inbox start automatically when you start your computer, you can easily launch it from the Windows taskbar.

To open your WebACD Inbox:

- 1 Go to the Windows taskbar.
- 2 Right-click the **WebACD** icon.



On the pop-up menu, choose **Show WebACD Inbox**

One of the following occurs:

- Your inbox appears, with the list of queues you have selected to view
- A dialog box appears with a list of your available inboxes. Select one or more Inboxes for viewing.

Tip: As a shortcut to WebACD, you can double click the WebACD icon on the Windows taskbar to show one or more Inboxes:

- If you have only one Inbox, WebACD immediately shows it.
- If you have multiple Inboxes, WebACD displays a dialog box with a list of Inboxes.

Customizing your view

At times, you may want to check the traffic in other queues; at other times, you may want to see just the details about your current session. WebACD has features that allow you to see as much detail as you need for your current task.

To see all customers in all queues:

On the **View** menu, choose **Expand All**.

To hide the list of customers waiting in your queues:

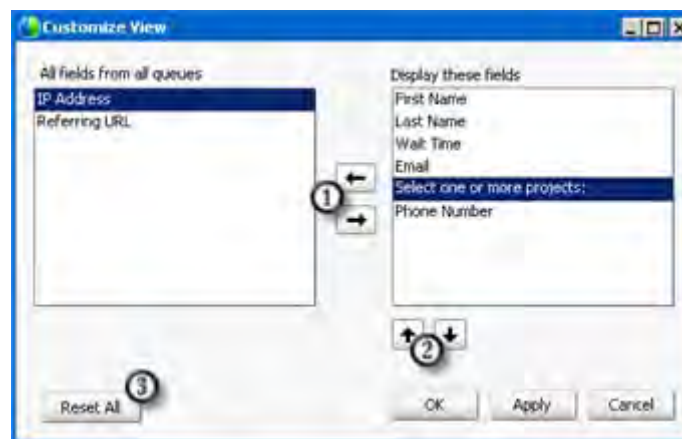
On the **View** menu, choose **Collapse All**.

Viewing customer details

You can choose which details about customers you want to view in the Inbox tab of your WebACD Inbox.

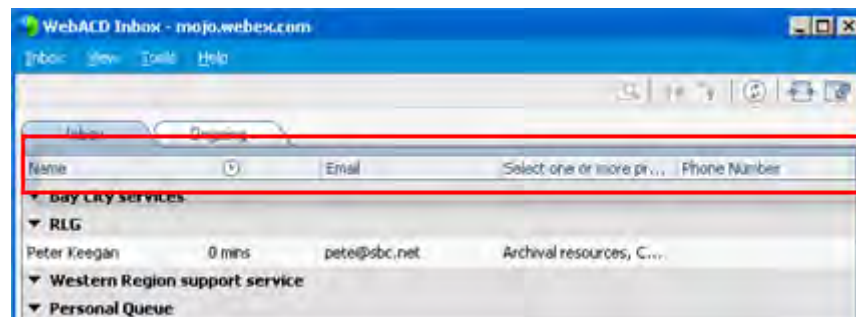
To select the information you want to see in your Inbox tab:

- 1 On the **View** menu, choose **Customize View**.
- 2 Using the arrows, select the fields you want to see.



- 1 Use these arrows to select the fields you want to view.
- 2 Use these arrows to change the order of fields in the Inbox.
- 3 Click **Reset All** to display the default settings.

This example shows how the selected fields appear on the **Inbox** tab.



Column views set in the **Customize View** dialog box

To display all columns in your Inbox tab:

On the **View** menu, choose **Show All Fields**.

Tip: To quickly see all details about a customer, right-click the customer in your inbox and choose **Show Details**.

Managing your work flow

WebACD provides a number of features for managing incoming support requests:

- accept customer requests automatically and speed up service in your queue [More...](#) (on page 14)
- switch your status between **Available** and **Unavailable** to manage traffic flow to your queue [More...](#) (on page 14)
- use your personal queue to help customers reach you on ongoing support issues [More...](#) (on page 15)
- View more detailed information about your customer [More...](#) (on page 16)
- invite another agent to join your session to assist your customer [More...](#) (on page 13)
- transfer a customer session to another agent for handling [More...](#) (on page 18)

Accepting the next request automatically

If you want to move quickly to the next customer, you can set your Inbox to "Auto-Accept" the next request. After you complete a support session, WebACD detects that you are available and displays a message, letting you know that a customer is waiting in one of your queues. Simply click **Yes** to accept the new request. No need to check your queue; your new session starts immediately.

To "Auto-Accept" requests:

On the **Inbox** menu, choose **Auto-Accept ON**.

If you do not respond to the message or you click **No**, WebACD sends this request to other agents who are available.

Changing your status

If you are not able to handle requests, you can keep customers from waiting in your queue by setting your status to "Unavailable."

To switch your status between "Available" and "Unavailable:"

On the Inbox menu, choose **Change My Status > Unavailable**.

To switch back, on the **Inbox** menu, choose **Change My Status > Available**.

Handling your personal queue

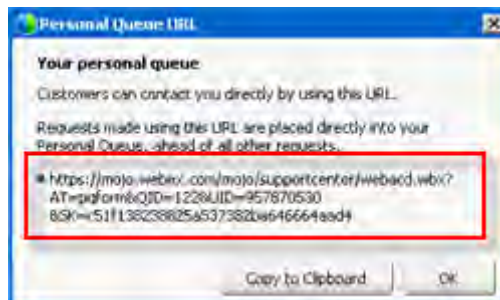
Your personal queue facilitates handling issues that require your staying in contact with a particular customer. This queue is very useful if a customer needs to get in touch with you personally to close an issue or receive follow-up assistance. When you determine that a customer may need to contact you on an ongoing support issue, you provide your personal URL to that customer.

WebACD creates this URL for you automatically, using the site name and your account name. Requests sent to your personal queue receive a higher priority than requests in your other queues. You have one personal queue per site.

To view and copy your personal queue URL:

- 1 On the Inbox menu, choose **Personal Queue URL**.

A dialog box appears with the URL customers can use to contact you directly.



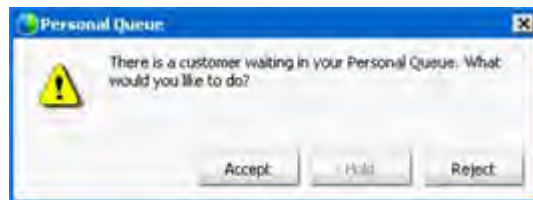
An example of a personal queue URL

- 2 Click **Copy to Clipboard**.
- 3 Paste the URL in a chat or other message and send it to your customer.

If the customer needs to contact you personally, he or she can paste this URL into a browser window. [More...](#) (on page 15)

How WebACD manages requests in your personal queue

When a customer needs to contact you on an ongoing issue, the customer can paste your personal queue URL into a browser window. The session request form displays and the customer types the requested information, such as name and email address.

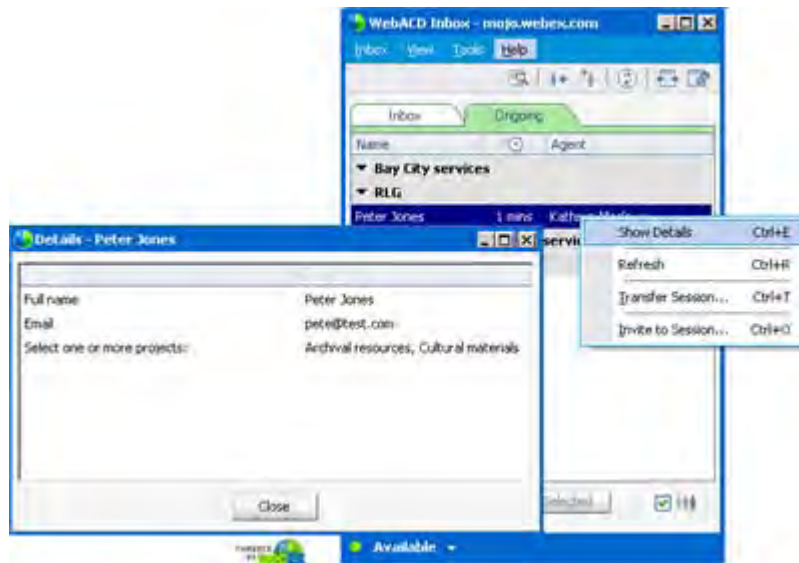


If a customer contacts you using your personal URL, WebACD routes the request to your personal queue and asks if you want to accept, hold, or reject the request.

Option	Action
Accept	WebACD displays the request immediately Note This option only appears if your status is Available
Hold	If you are busy, WebACD places this request at the top of your queue
Reject	WebACD displays the Leave a Message form to customer

Getting more details about your customer

To find out more about a customer, right-click on his or her name in the queue. The details page displays with the information typed on the entry form.

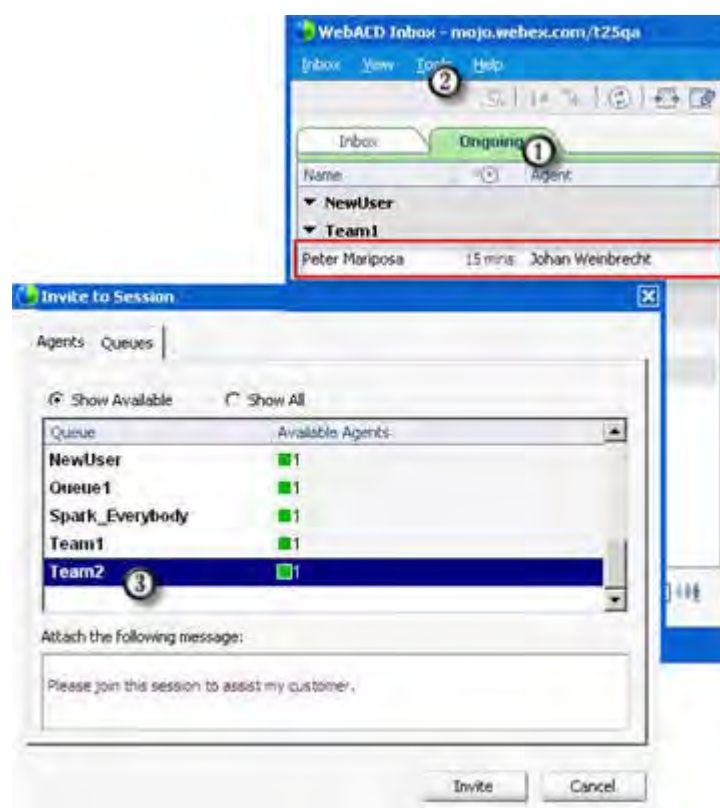


Right click on the customer name and then choose **Show Details**.

Inviting other agents to join your session

If you need information or assistance from other agents, you can reach them quickly. You can invite all agents assigned to a queue or invite particular agents from among those available for that queue.

To invite all agents assigned to one queue:



① On the **Ongoing** tab, select the session for which you need assistance.

② On the **Tools** menu, choose **Invite to Session**.

③ On the **Queues** tab, select the queue of agents to invite to this session.

Optional. Type a personal message.

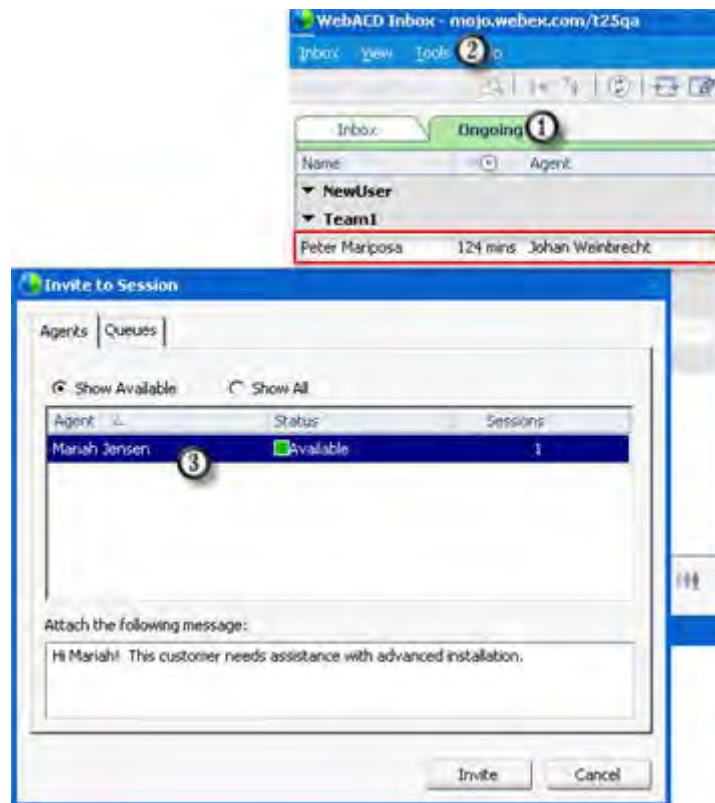
Your message can be up to 345 characters long.

You may only request agents in one queue to join.

- Any available agent in the queue you have selected may join the session.
- Agents with the Auto-Accept option can join from the message box that appears.

Tip: If you started the support session, select it from the **Outbound** queue, which lists sessions started by you and other support representatives.

To invite one or more specific agents to join your session:



- ① On the **Ongoing** tab, select the session for which you need assistance.
- ② On the **Tools** menu, choose **Invite to Session**.
- ③ On the **Agents** tab, select the agent, or agents, to invite to this session. Use the **Shift** key with your mouse to select multiple agent names.

Optional. Type a personal message.

Your message can be up to 345 characters long.

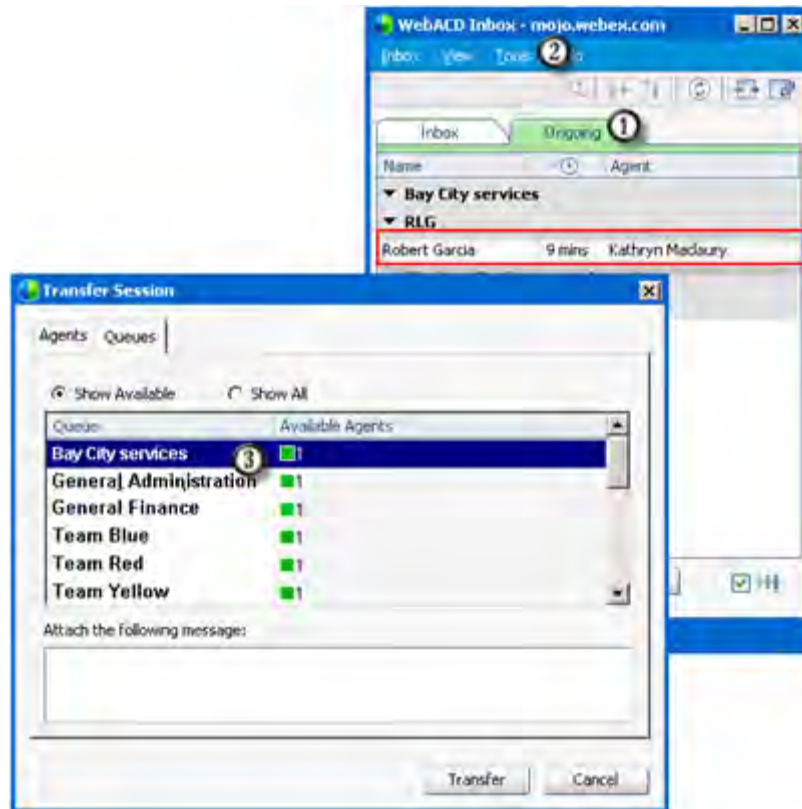
- Any available agent you have selected may join the session.
- Agents with the Auto-Accept option can join from the message box that appears.

Tip: If you started the support session, select it from the **Outbound** queue, which lists sessions started by you and other support representatives.

Transferring a session to another agent

You can use WebACD tools to transfer a customer session to one or more specific agents or you can transfer the session to a queue of agents. Along with the session transfer, you can include a message providing some relevant information about the customer's request for assistance.

To transfer a session to all agents assigned to one queue:



- ① On the **Ongoing** tab, select the session to be transferred.
- ② On the **Tools** menu, choose **Transfer Session**.
- ③ On the **Queues** tab, select the queue you want to transfer this session to.

Optional. Type a personal message.

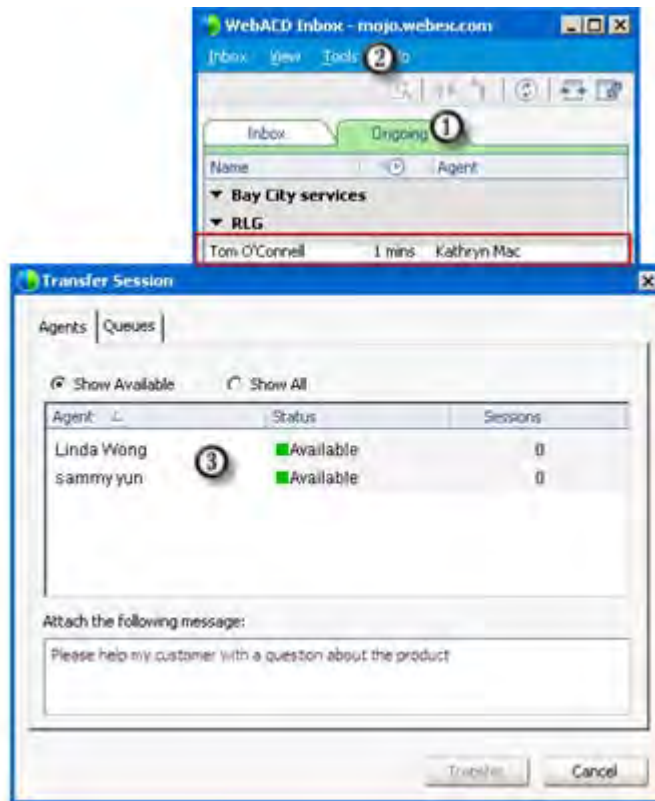
Your message can be up to 345 characters long.

- Any available agent in the queue you have selected may accept this request.
- Agents with the Auto-Accept option can accept the request from the message box that appears.

After an agent accepts your request, your session closes.

Tip: If you started the support session, select it from the **Outbound** queue, which lists sessions started by you and other support representatives.

To transfer a session to a specific agent:



- 1 On the **Ongoing** tab, select the session to be transferred.
- 2 On the **Tools** menu, choose **Transfer Session**.
- 3 On the **Agents** tab, select one or more agents to transfer this session to.

Optional. Type a personal message.

Your message can be up to 345 characters long.

- The agent responds to your request using the page WebACD displays.
- Agents with the Auto-Accept option can accept the request from the message box that appears.

If your request is not answered or refused, you may send a request to another agent. Your session remains open until an agent accepts your request.

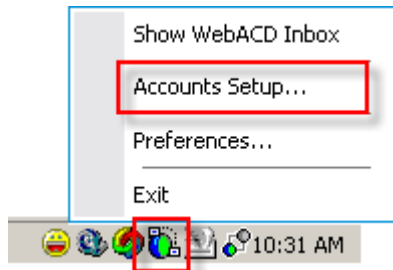
Tip: If you started the support session, select it from the **Outbound** queue, which lists sessions started by you and other support representatives.

Adding and removing URLs (sites)

You may need to take requests from more than one site (URL). Your site administrator sets up the queues for these added sites. You must add these URLs as accounts in your WebACD Inbox. WebACD displays an Inbox for each valid URL.

To add a new URL (Account) to monitor:

- 1 Go to the Windows taskbar.
- 2 Right-click the **WebACD** icon.



Choose **Accounts Setup** to add or remove accounts

- 3 In the Accounts Setup dialog box, click the **Plus (+)** button below the Accounts box.
- 4 Type the site URL.

Your site administrator provides the site URL. This URL is also the Account name and contains "webex" as part of it.

- 5 Type your user name and password for this site.
- 6 Click **Add**.

WebACD checks the information you have entered. If the URL and other details are correct, this account is added. The queues you have been assigned to handle appear automatically the first time you sign in to this new site.

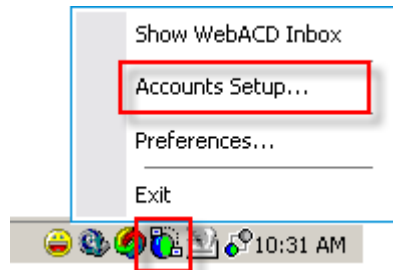


The account name and the site URL are the same.

If you no longer handle requests for a particular account (URL), you can remove it from your WebACD Inbox.

To remove an account (URL):

- 1 Go to the Windows taskbar.
- 2 Right-click the **WebACD** icon.



Choose **Accounts Setup** to add or remove accounts

- 3 In the Accounts Setup dialog box, select the account (URL) you want to delete.
- 4 click the **Minus** (—) button below the Accounts box.
- 5 Click **Yes** to confirm that you want to delete the account.

Troubleshooting accounts

If you see an account name in red on your list of accounts, WebACD has found a problem with this account. To diagnose the problem, select the account. WebACD displays the error message and some tips and information to help you resolve the problem with this account.

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