

Chat Agent User Guide

Overview

This guide will assist you with accessing and properly using the Arise Chat Tool.

Special Overall Call Outs

- Group Chat rooms are used for general information and for Chat PFs to communicate with all servicing Agents regarding general issues.
- Personal Chat is used when you need one-on-one help from a Chat PF so you can better assist your customer with a specific issue.
- The Chat PFs are a limited resource. Once the Chat PF has answered your question or provided you with the needed direction please be prepared to continue helping your customer on your own. This way the Chat PF can assist other Agents in need of help. You can always reach back out to a Chat PF if additional help is needed.

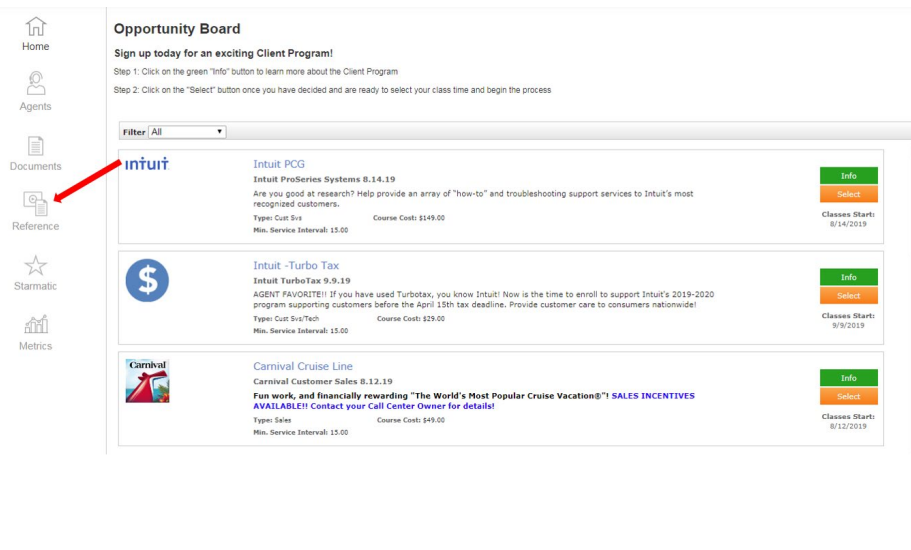
Chat Tool Access & Basics

Step 1:

You will access the Chat tool through your normal Arise portal login at <https://portal.arise.com>

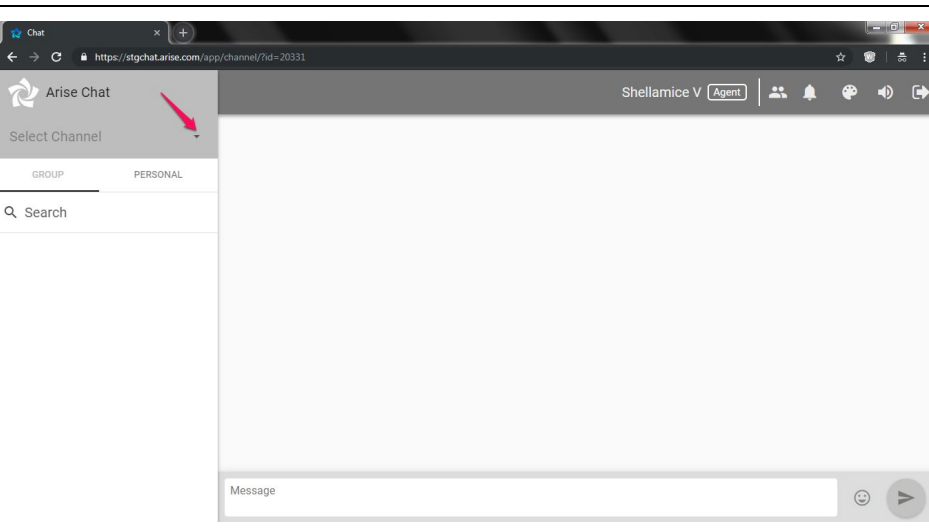
You will find the link to the Chat tool for your client by clicking the Reference link

Note: If the Arise portal is down you can use <https://chat.arise.com> to access Chat. You will then enter your valid portal username and password to login



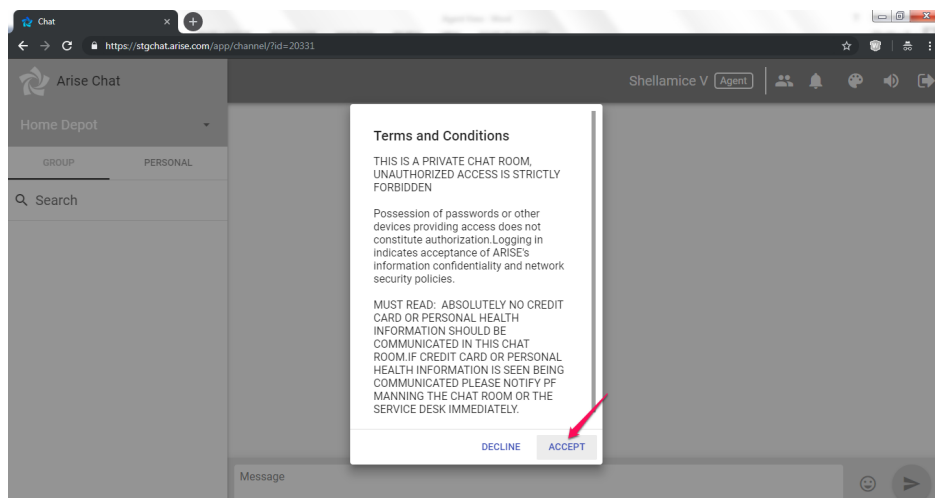
Step 2:

Select a channel



Step 3:

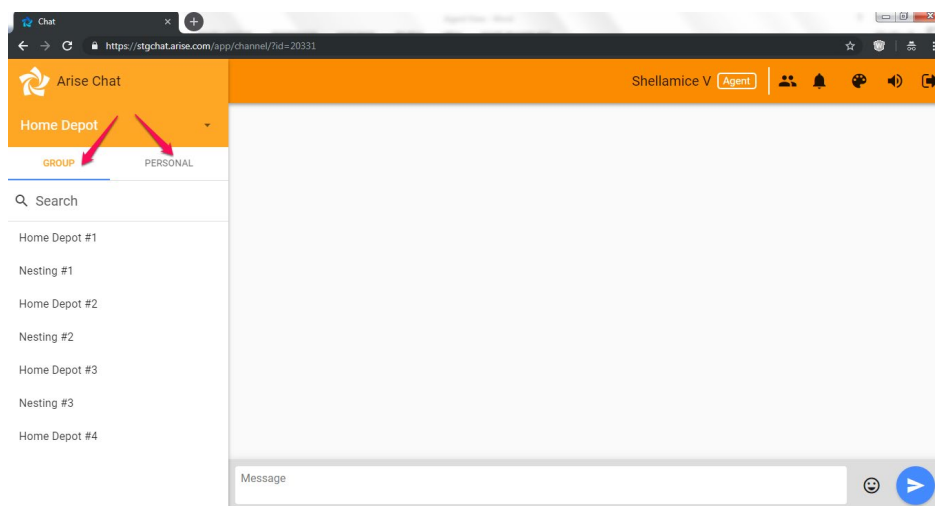
Accept the Terms and Conditions



Step 4:

There are two options

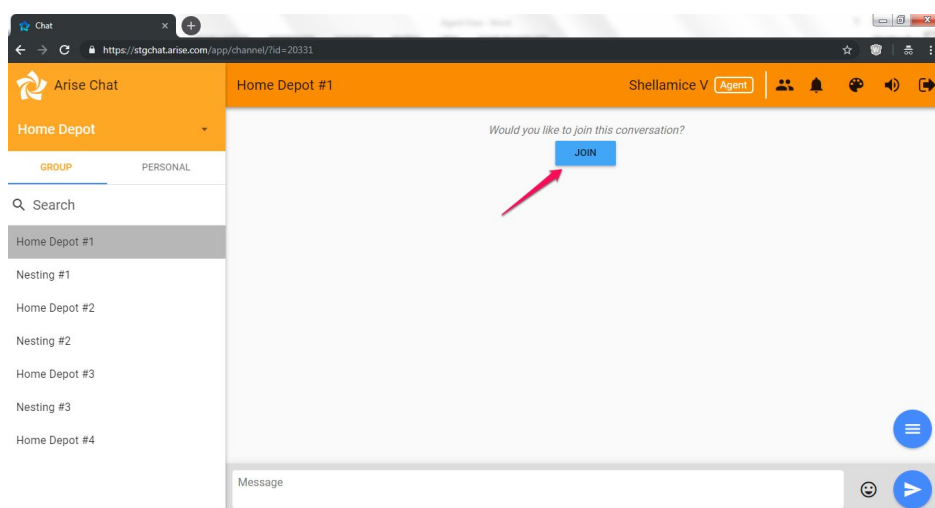
- Group chat – this should only be used for larger communications such as program updates or Service Announcements
- Personal chat – is used when you need help assisting your customer with a specific issue.



Step 5:

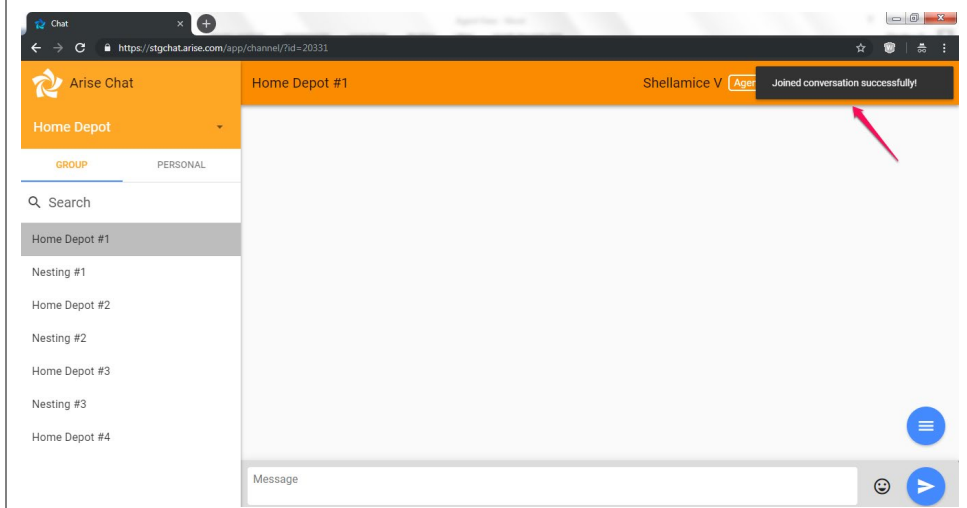
New user sees a 'Join' button

After clicking on join button user will join the channel conversation



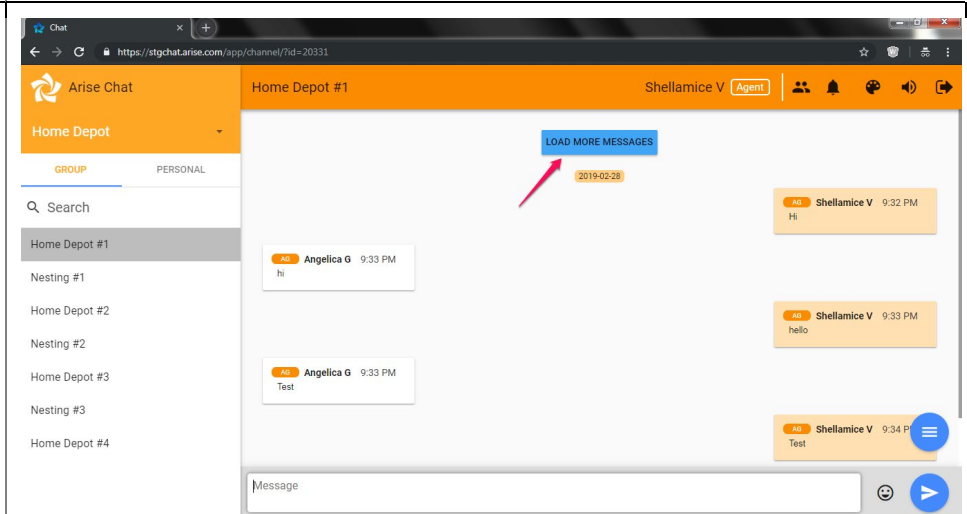
Step 6:

You will see a note letting you know you have joined the conversation successfully



Step 7:

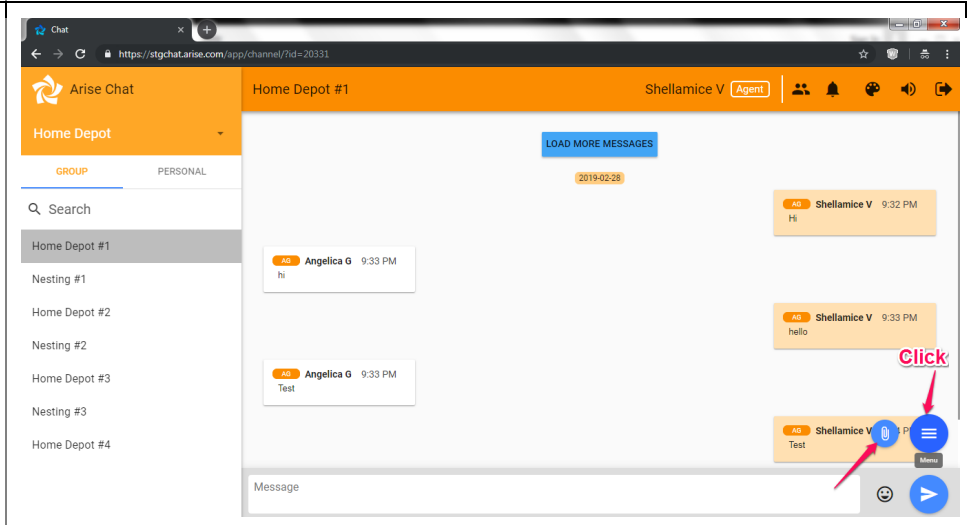
Clicking 'Load More Messages' will load more messages than what is being displayed



Step 8:

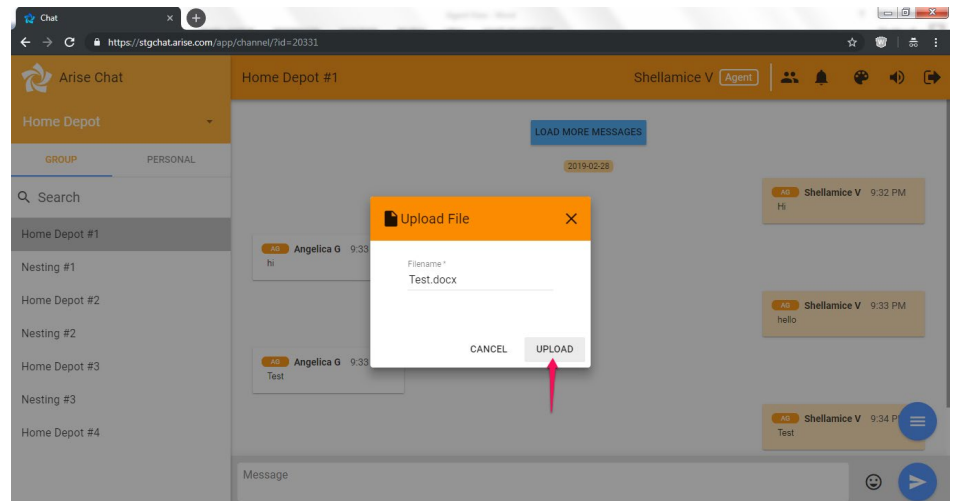
If you need to attach a file to the chat

Click the menu icon then the paperclip icon



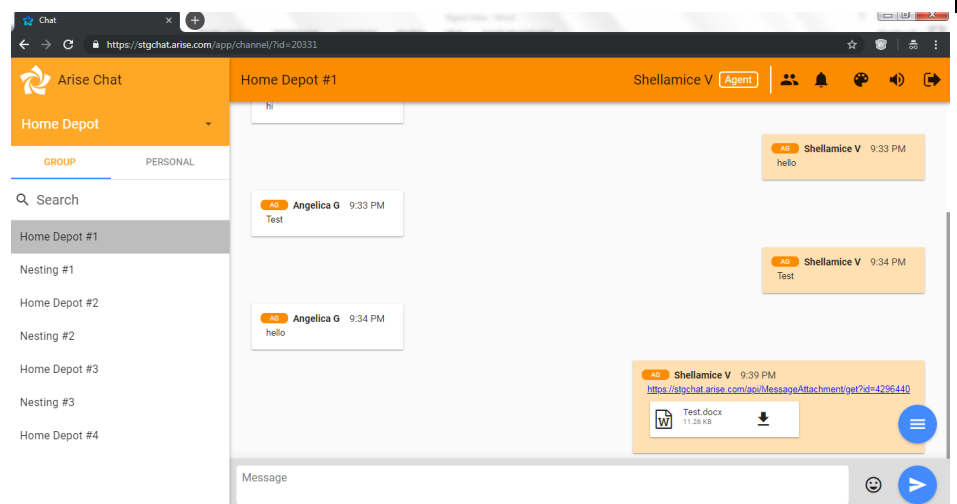
Step 9:

Choose the file and click upload



Step 10:

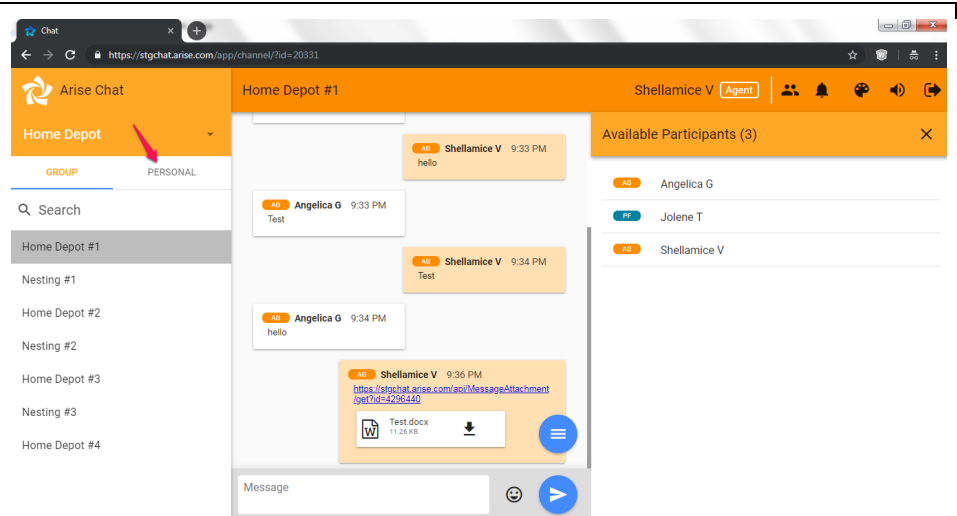
Attachment has been sent



Step 11:

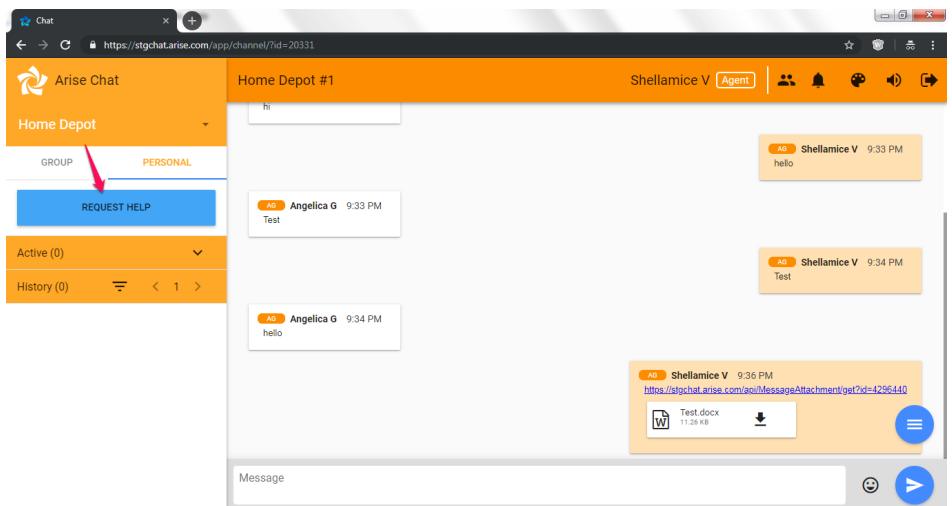
When you need help from a Chat PF in order to assist your customer with a specific issue.

Click on 'Personal'



Step 12:

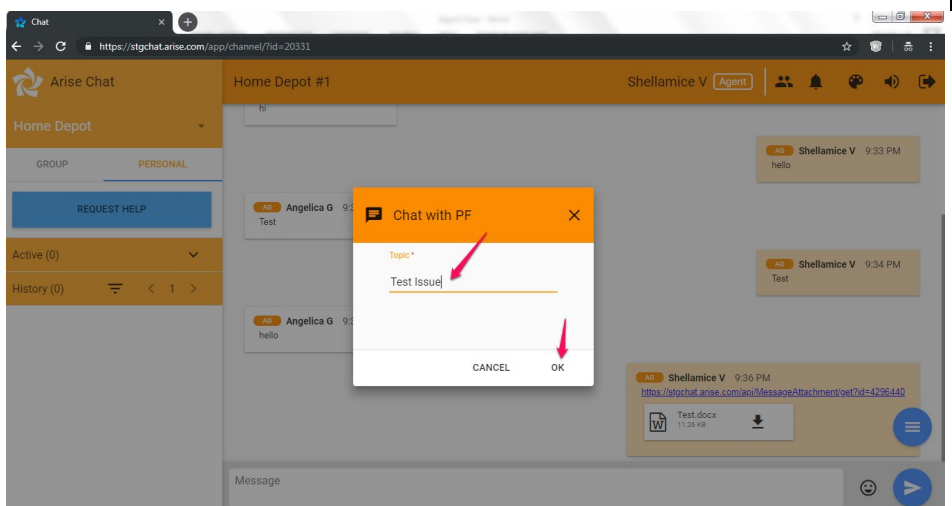
Click on 'Request Help'



Step 13:

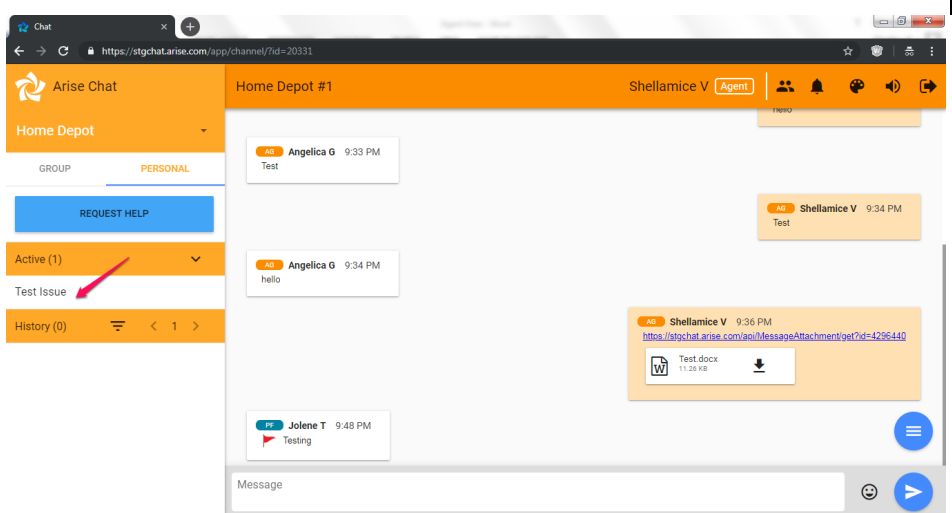
Enter a topic (in this example 'Test Issue') then click on 'OK'

Note: Please follow the directions provided by your specific program as to how to format your topic.



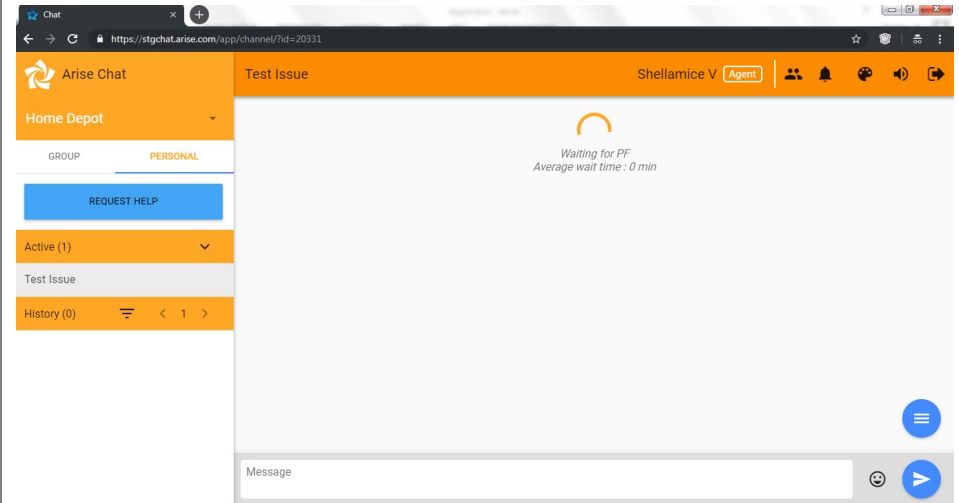
Step 14:

Click on the topic (in this example 'Test Issue') to view chat window for that Personal chat



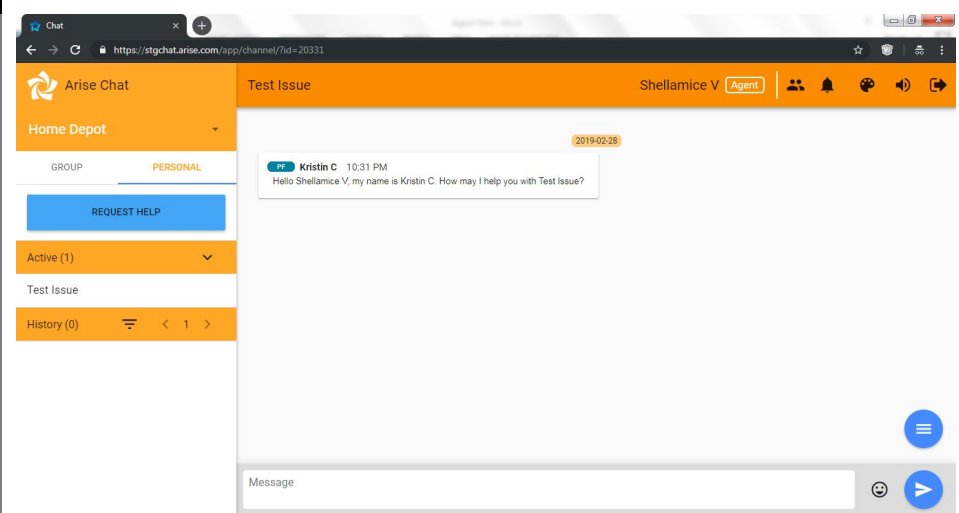
Step 15:

This shows your Request is waiting for the Chat PF to accept the chat



Step 16:

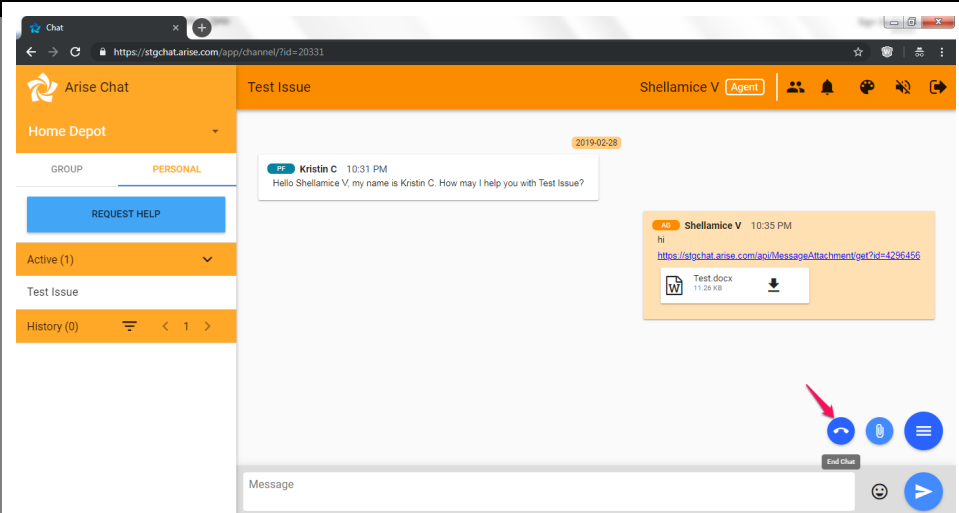
This shows the Personal chat has been accepted by a Chat PF



Step 17:

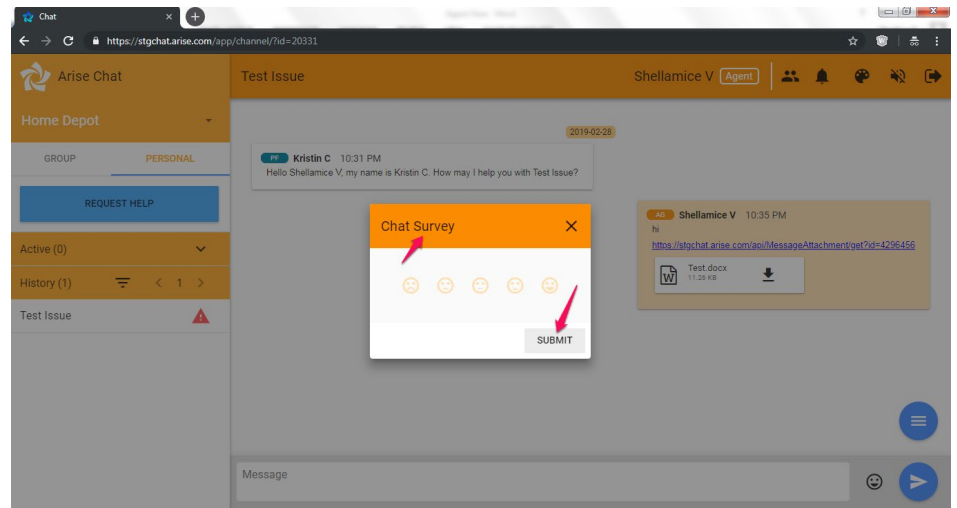
Note: The Chat PFs are a limited resource. Once the Chat PF has answered your question or provided you with the needed direction please be prepared to continue helping your customer on your own. This way the Chat PF can assist other Agents in need of help. You can always reach back out to a Chat PF if additional help is needed.

Click the handset icon to End chat



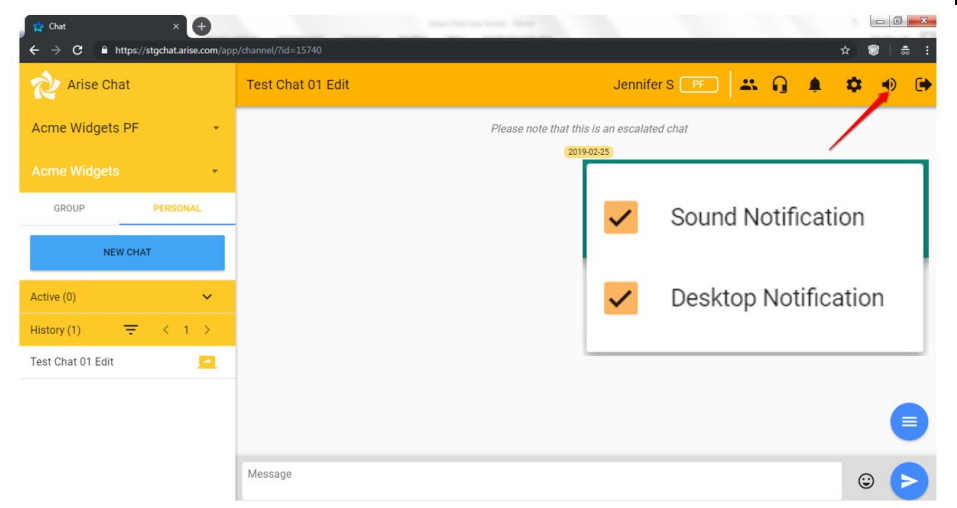
Step 18:

Rate the chat experience and click submit



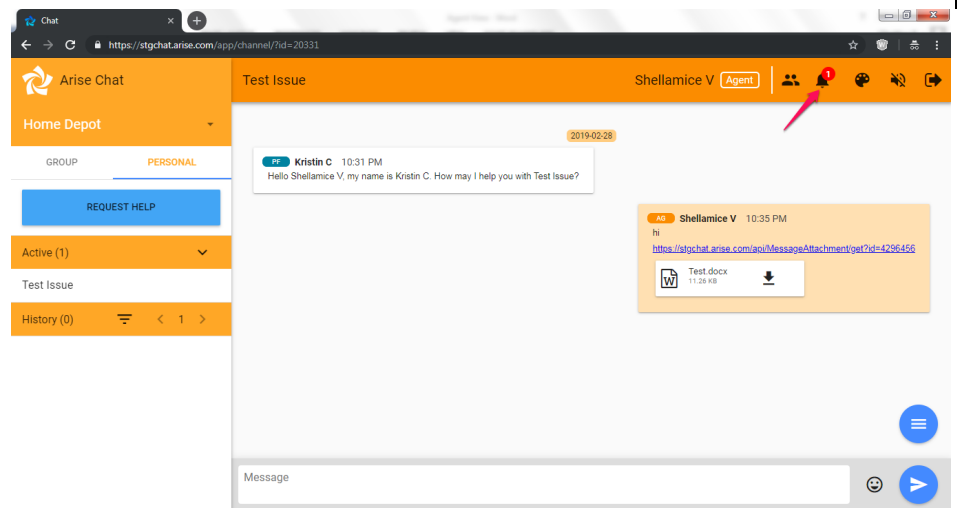
Step 19:

You can mute notifications. If this is done, you will not receive notification.



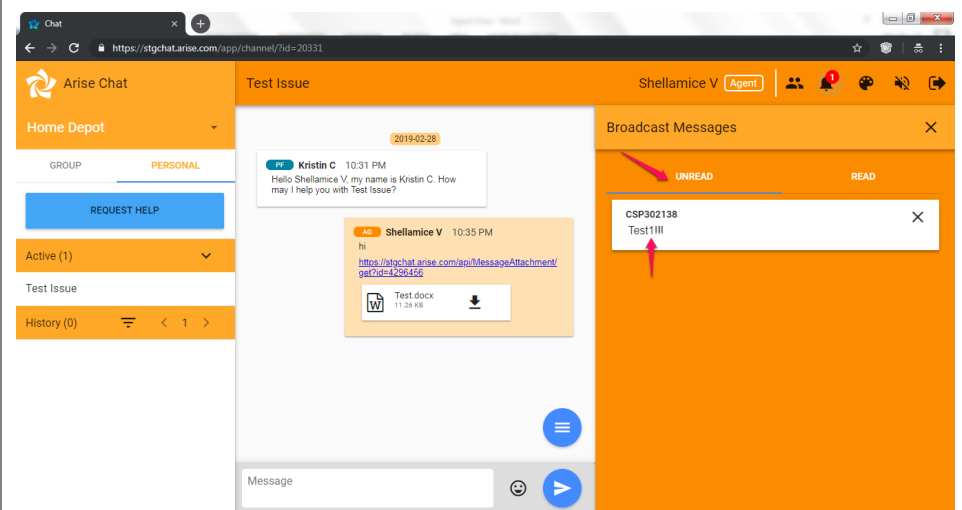
Step 20:

You can view broadcast messages by clicking the bell icon



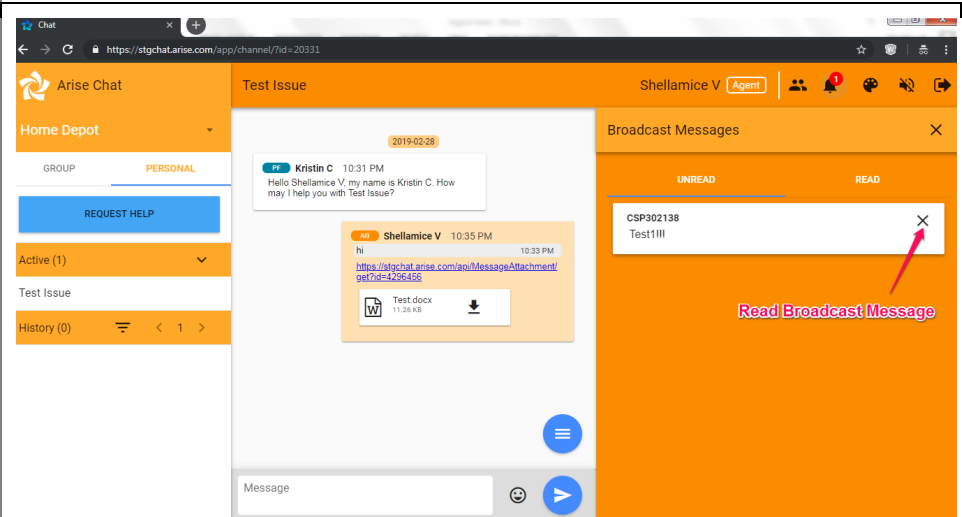
Step 21:

You can see unread messages



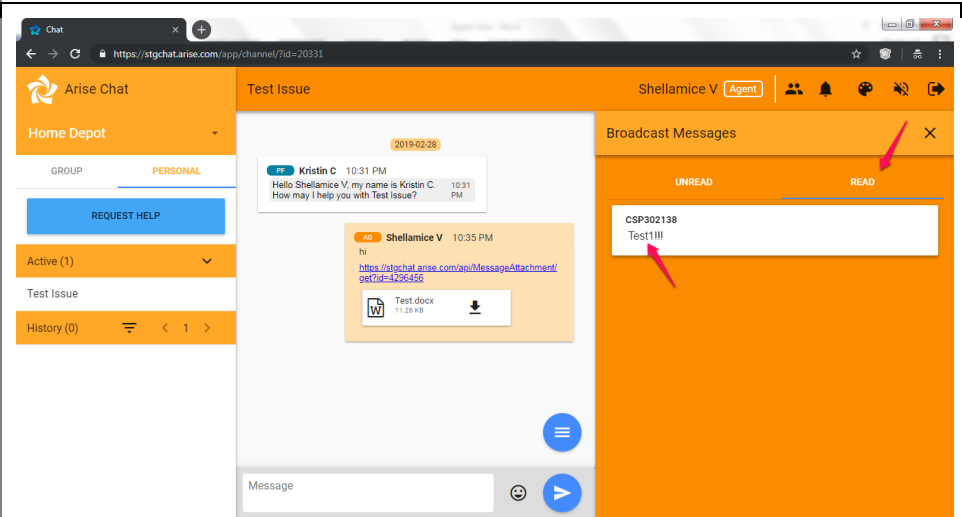
Step 22:

You can close unread messages



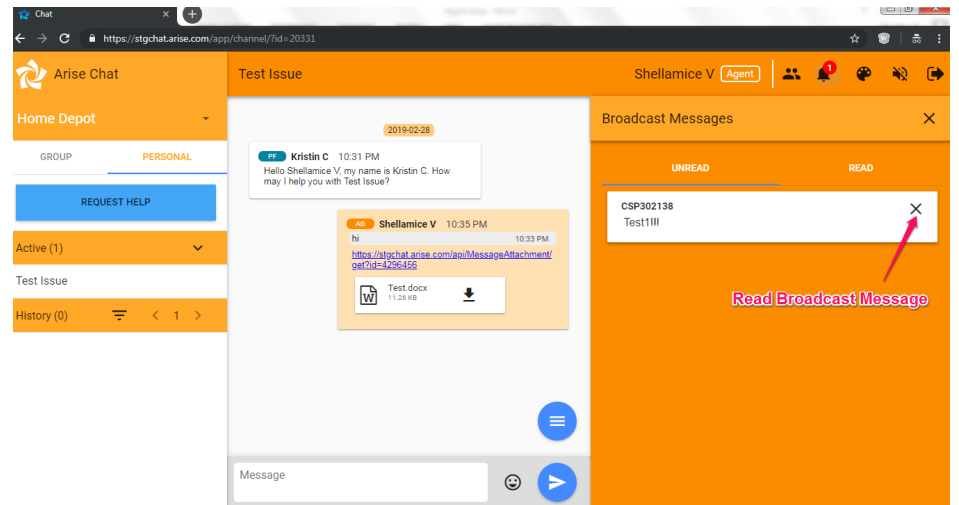
Step 23:

You can see read messages



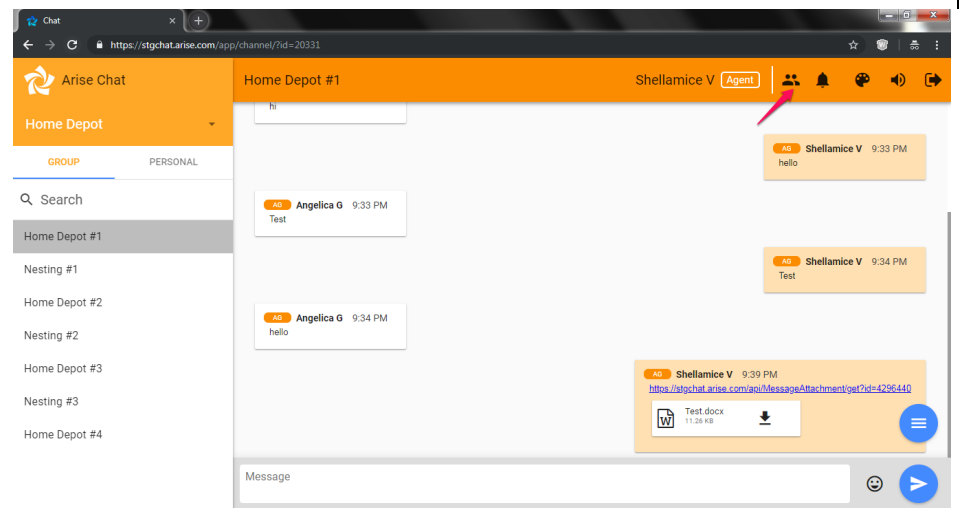
Step 24:

You can close read messages



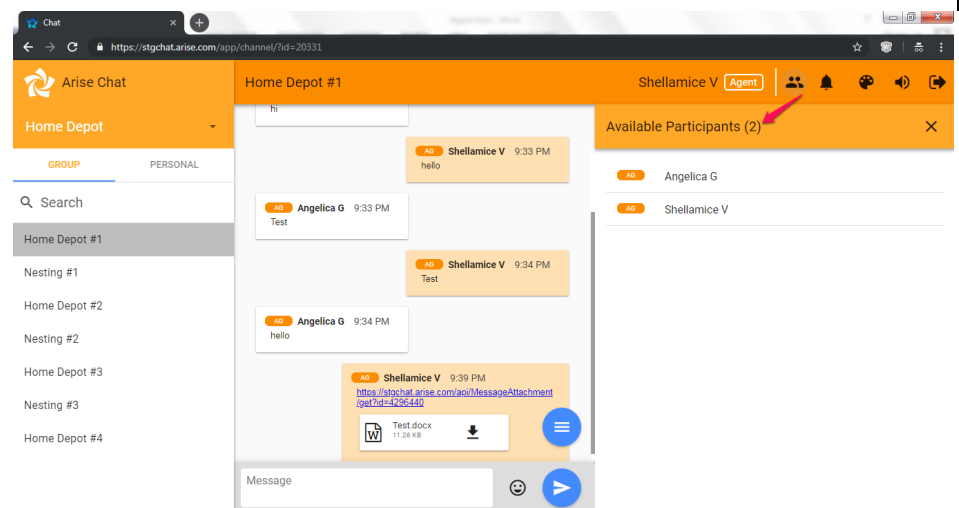
Step 25:

Clicking on the participant list will show a list of users and number of users in the channel conversation.



Step 26:

Participant list updates in real time, if a user switches to another chat or logs out they will be removed from the participant list. Participant list shows only active users.



Step 27:

You can send emoji's in group and personal chat conversations

