

Data Insert in Agent Responses

With data insert, data related to the customer and issue is dynamically inserted into agent responses.

The data insert capability in Agent Desk saves response crafting time by minimizing manual editing agents often do to insert customer and issue specific data before sending a response to the customer.

In addition to responses in the global library, data inserts can now be added to agents' custom responses. Further, agents can also add data inserts in-line to a response while typing in composer view.

The screenshot displays the Agent Desk composer interface. A dropdown menu is open, listing data insert options with their corresponding values:

- First name: Katy
- Last name: Zhuang
- Full name: Katy Zhuang
- Subdivision name: Hudson Cable
- Company name: Hudson

The text input field contains "Hello {nam|". A "Send" button is visible to the right of the input field. At the bottom of the interface, there are instructions: "Enter to send Shift + Enter to add a line" and a timer showing "Customer waiting for 00:02".


Viewing responses in auto-suggest and the typing field that contain a data insert

Hello **Katy** , thanks for contacting **Hudson Cable** . How can I help you this **morning** ?

No problem, I would be happy to help you with that.

One moment while I pull up your account information.

Type a message to Katy Send

 to search Customer waiting for 00:02

If a suggested or selected response contains a data insert that is available and has properly resolved, the dynamic text will be highlighted in light blue.

First name
{firstName}

Hello **Katy** , I'll be happy to help you with that today. Send

Enter to send Shift + Enter to add a line Customer waiting for 00:02

Agents can hover over a resolved data insert to see the original data insert source that was used.

Sending a response with a data insert that is not available

Hello {firstName}, thanks for contacting **Hudson Cable** . How can I help you this **morning** ? Send

Enter to send Shift + Enter to add a line Customer waiting for 00:02

If a response contains a data insert that is not available and therefore cannot be resolved (e.g. the customer is not authenticated and therefore certain data is unavailable), the original insert tag name will be highlighted in gray.

Data insert not available

The following data tag(s) will be sent as plain text.
Send anyway?

1 Tag

- {firstName}

Send anyway Go back

Hello {firstName}, thanks for contacting **Hudson Cable** . How can I help you this **morning** ? Send

Enter to send Shift + Enter to add a line Customer waiting for 00:02

A warning message will display before an agent sends a response containing an unresolved data insert. Agents can either continue or go back to make changes before sending.

Viewing responses in the response library that contain data inserts

The screenshot shows a search interface with a search bar containing 'Greeting'. Below the search bar are two tabs: 'Custom' (selected) and 'Global'. The results section is titled '3 Custom response results for "Greeting"'. The first result is a message: 'Hello First name, thanks for contacting Subdivs can I help you this Time of day ?'. The text 'First name', 'Subdivs', and 'Time of day' are highlighted in gray. A hand icon is hovering over a paperclip icon, and a dark button labeled 'Insert response' is visible. The second result is 'Review account' with the text 'Please give me one moment while I pull up your account info. I would be happy to continue our conversation, but...'. The third result is 'Review bill' with the text 'No problem, I can definitely help you with. Give me one moment while I pull up your billing info.'. Each result has a folder icon labeled 'Greeting' and a paperclip icon with a three-dot menu.

Agents can see which responses in the custom and global response library contain data inserts. Responses with data inserts have the generic text highlighted in gray to indicate that they are properly identified data insert fields but are in their generic (unresolved) state.

Using data insert while composing a message

First name {firstName} Katy

Last name {lastName} Zhuang

Full name {fullName} Katy Zhuang

Subdivision name {subdivisionName} Hudson Cable

Company name {companyName} Hudson

Support phone {supportPhone} 763-888-7878

Hello {

Send

Enter to send Shift + Enter to add a line Customer waiting for 00:02

To use the data insert capability while composing a message, the agent can type `{` in the typing field. This will pull up a menu of all available data inserts for that chat.

First name {firstName} Katy

Last name {lastName} Zhuang

Full name {fullName} Katy Zhuang

Subdivision name {subdivisionName} Hudson Cable

Company name {companyName} Hudson

Support phone {supportPhone} 763-888-7878

Hello {nam|

Send

Enter to send Shift + Enter to add a line Customer waiting for 00:02

Agents can type to search and filter down the available data inserts. Once located, the agent can arrow up and hit enter or click to select the relevant data insert option.

Using data insert while creating and editing custom responses

✕ Add Custom Response

Response title

0 / 100

Response text

Account Status
[accountStatus]

0 / 1250

Save to folder

In order to use the data insert capability while creating or editing a custom response, the agent can type { in the text field. This will pull up a menu of all possible data inserts to choose from, which the agent can continue to type and search to filter down.

✕ Add Custom Response

Response title

0 / 100

Response text

0 / 1250

Save to folder

Once a data insert is selected, the generic field name will display, highlighted in gray, to indicate that a data insert field has been recognized.

Note: the data insert displays in gray because it is in its generic state (no customer or issue specific data has been slotted into the library entry).