



Messaging module

Technical support employee workstation

User's manual

Version 1.15



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1. General information

1.1 Purpose

The **Messaging module** (the Module) is intended for the organization of communication.

1.2 Basic definitions

- **Group of employees** is a group consisting of support service employees.
- **Informational channel** is a channel for sending informational messages to clients who have the permission to receive them.
- **Client** is a broker's client who operates via the QUIK workstation.
- **Case** is a user (client) case registered by support service of the basis of a message that a user sent to the support chat.
- **Employee** is a support service employee who operates via the QUIK workstation.

1.3 Features

- Receive messages from clients and maintain correspondence.
- Stop messaging with a client. Other employees can continue the chat.
- Transfer the chat to another group of employees.
- Send messages to informational channels (if having the corresponding permission).
- Start messaging with a client (if having the corresponding permission).
- Send messages to the groups of employees (if having the Client permission).
- View the chat history for the period that was set by broker and not ended chats for the previous days.

1.4 Main windows and menu items

The Module functions are accessed through the main menu of QUIK workstation.

If a user has necessary files and permissions, [Tech. support](#) command is displayed on the **Plugins** menu and the  button is displayed on the Tech. support toolbar, by using which a user can open the chat window.

(*) The command name is set by the broker. By default, it is Tech. support.

2. Settings

menu **System / Settings / General settings... / Tech. support chat**

The settings window contains the following parameters:



- **Show notifications:**

- **Use broker settings** – use the settings of notification display set by broker.
- **Use local settings:**
 - **Show notifications on desktop** – show the notification window on the desktop when new chat messages arrive;
 - **Always show notifications**– show notifications when the chat window is open;
 - **Automatically hide notifications** – automatically hide notifications some time after showing them.

If notifications display is enabled in the settings but notifications for a specific employee group are disabled in the chat (icon  is not shown), then no notifications are shown for this group on the desktop.

To enable sound notifications about new messages, use the QUIK workstation settings (menu System / Settings / General settings..., section Program / Sounds). For details, see the User's manual of QUIK workstation, Chapter 2, "Basic Operating Principles".

- **Chats:**

- **Add online users to the top of chats tree** – online users (marked by ) are shown at the top of the list. Selected by default.

- **Sort by** – users in the list are sorted by:

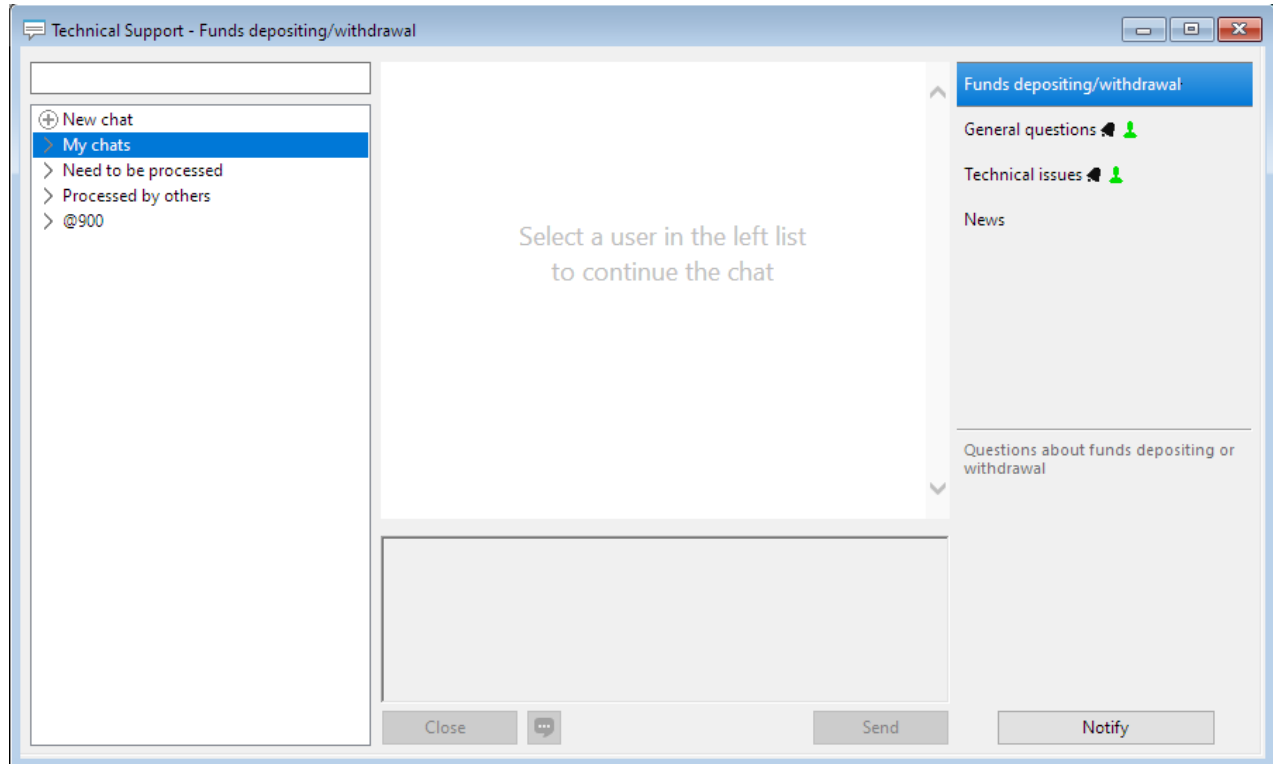
- **Last message time;**
- **Chat start time** (by default).



3. Tech. support

3.1 Chat window

menu **Plugins / Tech. support** (or )



The right part of the window shows the list of employee groups (for example, General questions or Technical support *), among which user cases are distributed, and informational channels (for example, News *). Selecting a group or a channel shows the description.

Event indicators can be displayed next to a support group name:

- The total number of unread messages from all the chats in a group processed by an employee.
- The  icon – if notifications are enabled for a group.
- The  icon – if there are not processed cases in a group.

(*) The name of informational channels and groups may differ from those presented on the screenshot.

The left part of the window shows the following parameters:

1. The box for filtering the list of user chats by name, UID, client code, phone number or email.



2. **New chat** – open the dialog box for searching a user to send a message. For details, see [3.2.2.](#)

The option is available if an employee is assigned with permission.

3. **My chats** – the list of users (and their number in brackets, if any) the chats with whom are processed by you.
- **Closed** – the list of users the chats with whom are closed. To resume the chat, type your message in the textbox and click **Send**.
4. **Need to be processed** – the list of users (and their number in brackets, if any) the chats with whom are not processed yet. Sending a message to a user from this list, you are taking the chat into processing.
5. **Processed by others** – the list of users the chats with whom are processed by other employees.

- **Closed** – the list of users the chats with whom are closed.

Online users are marked by .

Hovering the cursor over a user name shows a tooltip with the date and time the chat was created, class code and the user's firm code.

When the chat with a specific user is opened, the data of user is displayed in the right bottom part of the window: status (connected / disconnected / connected via API), name, organization, UID, contacts and client codes. An employee responsible for the case is also shown (if any). This information is available for copying using the shortcut menu or keyboard shortcuts (Ctrl+C, Ctrl+Insert, Ctrl+Shift+C, Ctrl+Shift+Insert).

The following buttons are displayed in the bottom part of the window:

1. **Close** – close a case. The button is available when selecting a user in the **My chats** list.

Click the  icon to open the list of available actions:

- **Take in processing** – attach the case to the employee. The button is available if a user from the **Need to be processed** list is selected.
- **Transfer** – transfer the case to another support group. The button is available if a user from the **My chats** list is selected.
- **Reject** – detach the employee's case. The button is available if a user from the **My chats** list is selected.

2.  button – opens the list of available topics and names of message templates. When selecting the message template name, its text is substituted in the message entry box.

The button is available if a user from the **Need to be processed** or **My chats** lists is selected.

3. **Send** – send a message. The button is available if a user from the **Need to be processed** or **My chats** lists is selected and there is a text in the message entry field.
4. **Notify / Disable notifications** – enable/disable showing notifications about an unread message for a support group on the desktop. The  icon is displayed next to the group name if notifications are enabled.

If display of unread message notifications on the desktop is enabled in the settings but notifications for a specific employee group are disabled (icon  is not shown), then no notifications are shown for this group on the desktop.

3.2 Chat actions

3.2.1 Reply to a user

1. On the **Plugins** menu, select **Tech. support** (or ).
2. In the right part of the window, select a group of employees. To do this, hover the cursor over a group and click it.
3. In the left part of the window, select a user. To do this, hover the cursor over a user and click it.
4. Type your message in the lower part of the window and click **Send** or press **Enter**. At this the dialog from the **Need to be processed** list is attached to the employee. You may also attach the dialog to the employee by clicking **Take in processing**.

If the message is delivered, the  icon is displayed next to it. The chat history for the period that was set by broker and not ended chats for the previous days.

If notifications are enabled in the QUIK workstation settings, you will receive a notification about a new chat message (for details, see [2](#)).

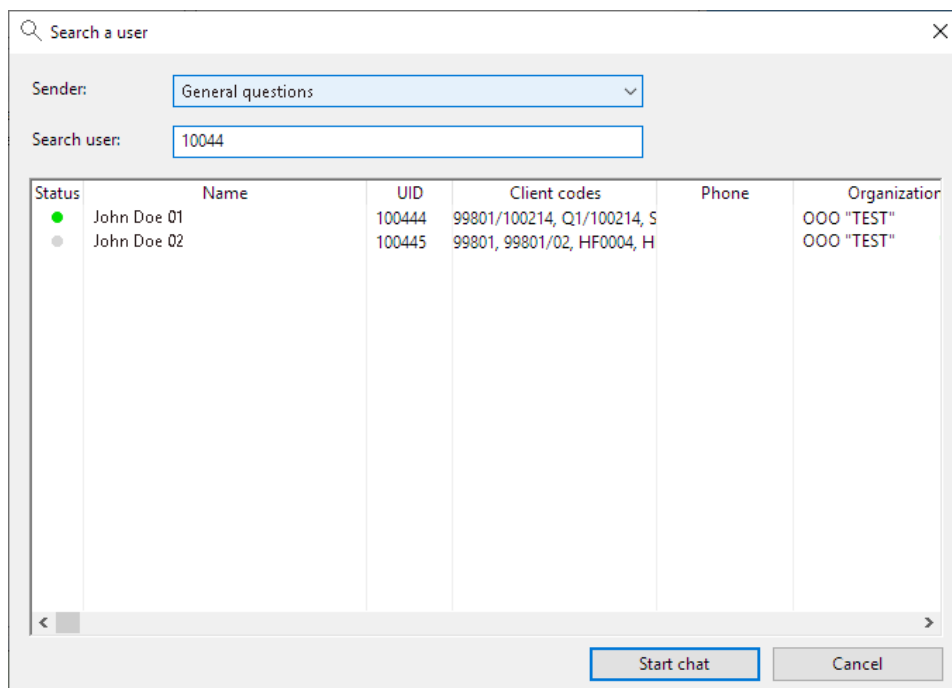
Once a new user query from appears, a case is registered. A case can be closed (see [3.2.5](#)), rejected (see [3.2.3](#)) or transferred to another group of employees (see [3.2.4](#)).

3.2.2 Start a chat

You can start the chat with a user if you have corresponding permissions.



1. On the **Plugins** menu, select **Tech. support** (or ).
2. In the left part of the window, select **New chat**. The **Search a user** window will open:



Status	Name	UID	Client codes	Phone	Organization
●	John Doe 01	100444	99801/100214, Q1/100214, S		OOO "TEST"
●	John Doe 02	100445	99801, 99801/02, HF0004, H		OOO "TEST"

3. In the **Sender** list, select a group of employees the chat will be included to.
4. In the **Search user** box, enter the value to search a user. You can search by name, UID, client code, phone number and email. The table with the list of users is filtered based on the value entered in the **Search user** box.
5. Select a user and click the **Start chat** button. The chat will be automatically attached to you. To close the window, click **Cancel**.

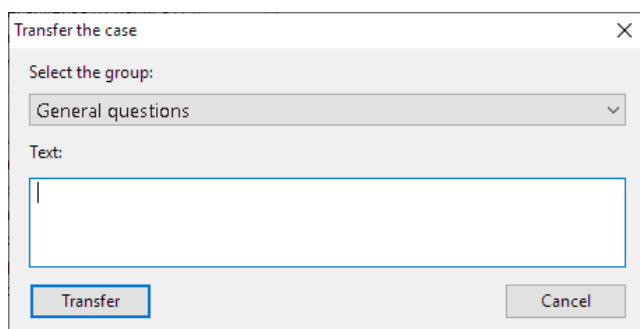
Once the chat is started, a case is registered. A case can be closed (see [3.2.5](#)), rejected (see [3.2.3](#)) or transferred to another group of employees (see [3.2.4](#)).

3.2.3 Reject a case

1. On the **Plugins** menu, select **Tech. support** (or ).
2. In the right part of the window, select a group of employees. To do this, hover the cursor over a group and click it.
3. In the left part of the window, select a user in the **My chats** list. To do this, hover the cursor over a user name and click it.
4. On the menu under the textbox, select **Reject**. The case will be transferred to the **Need to be processed** list and may be processed by other employees.

3.2.4 Transfer a case to another group

1. On the **Plugins** menu, select **Tech. support** (or ).
2. In the right part of the window, select a group of employees. To do this, hover the cursor over a group and click it.
3. In the left part of the window, select a user in the **Need to be processed** list. To do this, hover the cursor over a user name and click it.
4. On the menu under the textbox, select **Transfer**. The **Transfer the case** dialog box will appear.



5. In the **Select the group** list, select a group of topics the chat will be attached to.
6. In the **Text** box, enter a comment if necessary.
7. Click the **Transfer** button. To close the window without making changes, click **Cancel**.
8. After the case is transferred to another group the dialog in the initial group gets closed and a new dialog in the selected group is created. The new dialog contains the message history of the initial dialog and stays attached to the same employee.

3.2.5 Close a case

Once a new user query from appears, a case is registered. If the issue is solved, you can close a case. To do this, follow the steps:

1. On the **Plugins** menu, select **Tech. support** (or ).
2. In the right part of the window, select a group of employees. To do this, hover the cursor over a group and click it.
3. In the left part of the window, select a user in the **My chats** list. To do this, hover the cursor over a user name and click it.
4. On the menu under the textbox, select **Close**.



A client can also close a case.

Closing the window does not close a case.

3.2.6 Open a closed case

1. On the **Plugins** menu, select **Tech. support** (or ).
2. In the right part of the window, select a group of employees. To do this, hover the cursor over a group and click it.
3. In the left part of the window, select a user in the **Closed** list. To do this, hover the cursor over a user name and click it.
4. Send a new chat message.

3.2.7 Sending and receiving informational messages

You can read and send messages in informational channels if you have corresponding permissions.

To open an informational channel, follow the steps:

1. On the **Plugins** menu, select **Tech. support** (or ).
2. In the right part of the window, select a channel. To do this, hover the cursor over a channel and click it.
3. To send a message, type your message and click **Send**.