


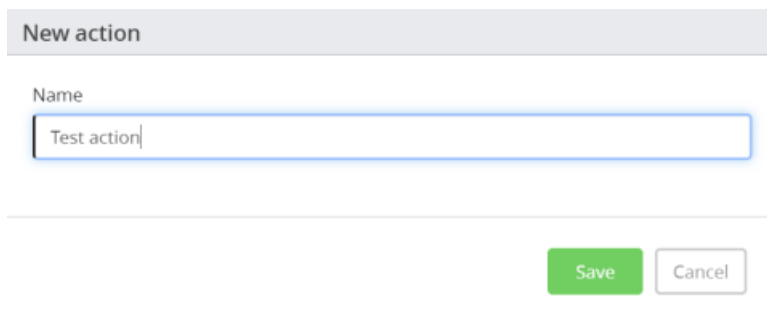
Creating and grouping actions

Actions are the activities performed by an agent while in a dialogue with the visitor. In co-browsing mode, you can send links, videos, images or documents such as pdf files.

Creating an action

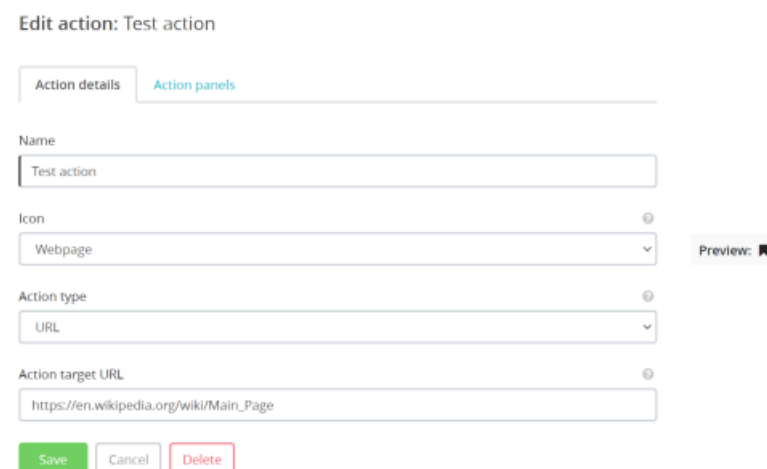
To create an action,

1. Go to Configure -> Actions -> click on  icon.
2. Enter a name for the action in the **'New action'** window and click **Save**. This will take you to the Edit action screen.



The 'New action' dialog box has a title bar 'New action'. Below it is a text input field labeled 'Name' containing the text 'Test action'. At the bottom right are two buttons: 'Save' (green) and 'Cancel' (grey).

3. In the **Action details** tab, select a suitable icon and **Action type** from the drop-down. Enter the target URL for the webpage, video, image or document.



The 'Edit action: Test action' screen has two tabs: 'Action details' (active) and 'Action panels'. Under 'Action details', there are four fields: 'Name' (containing 'Test action'), 'Icon' (a dropdown menu showing 'Webpage'), 'Action type' (a dropdown menu showing 'URL'), and 'Action target URL' (containing 'https://en.wikipedia.org/wiki/Main_Page'). To the right of the 'Icon' and 'Action type' dropdowns is a 'Preview:' button with a small icon. At the bottom are three buttons: 'Save' (green), 'Cancel' (grey), and 'Delete' (red).

4. Click **Save** before you proceed to the **Action panels** tab.
5. You can add the Action you just created to the list of Action panels available by clicking on the Action panel to select it. It will now appear on the right container to indicate that the action is now associated with the selected Action Panel. Click **Save**.

Edit action: Test action

Action details

Action panels

Available

1 Mid Atlantic action panel

1.0 My account panel

2 - Action Panel

211 action panel

AAA-action panel

Action panel - hotels

Action panel Kalmar

BCI panel

Berlin delivery panel

<<

>>

Selected

1. 0 Test panel

Save

Cancel

Delete

Alternatively, if you want to create a new Action Panel to add the Action into, select the Action panels option from the menu and follow the instructions in the next section.

To delete an Action, search for the action on the search bar and click on it. Press**Delete** and confirm you decision.

Grouping of actions

Action panels acts as a container for a group of related actions so that it is easier for the agents to find them. To create a new Action panel,

- Go to Configure -> Action panels -> click on the

+ New action panel

 icon.
- Enter the Action panel name and click Save.

New action panel

Name

New action panel

Save

Cancel

- Give a description and select action/s that you would like to associate with this Action panel.

Edit action panel: New action panel

An action panel groups actions for better overview and organization. Action panels are related to case types and are accessible in the desktop application

Name

Description

Assign actions to this action panel

Available

- 1 Telenor video
- 1.0 My account
- 1a actionen till panelen Twi
- 2 - Action
- 2 - Action URL
- 211 mutual funds
- 211 video
- AAA- delivery
- AAA-boxing video - click to view video

<<

>>

Selected

- 1. My account
- 1.0 Faq - action

4. Click **Save**

To delete an Action panel, click Delete and confirm your decision in the Edit action panel window.

You can also search for an action panel by typing the name in the search bar and clicking on it to see the details.