CoreEngage Agent Training

Social messaging: web chat, email, and SMS

Altigen Technologies | 2026

Training Agenda

01

Web Chat

Answer chats, use conversation controls, and translate languages.

02

Email

Pick up customer emails and reply through the web client.

03

SMS

Answer and reply to customer text messages.

04

Agent Assist

See caller details, history, and classification during a call.

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01

Web Chat

Answer and manage customer chats

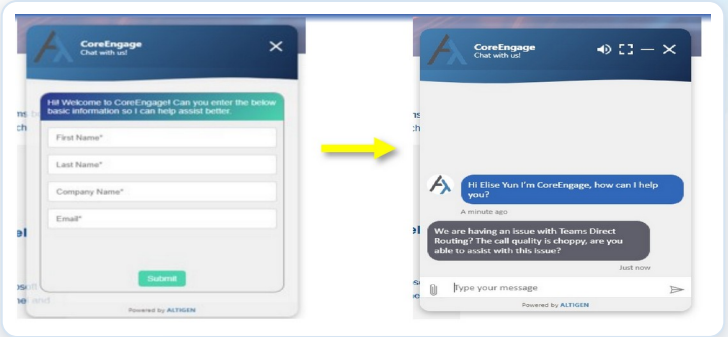
Answer a Chat

1. When a customer starts a chat, agents in the chat queue get a notification and see it waiting.

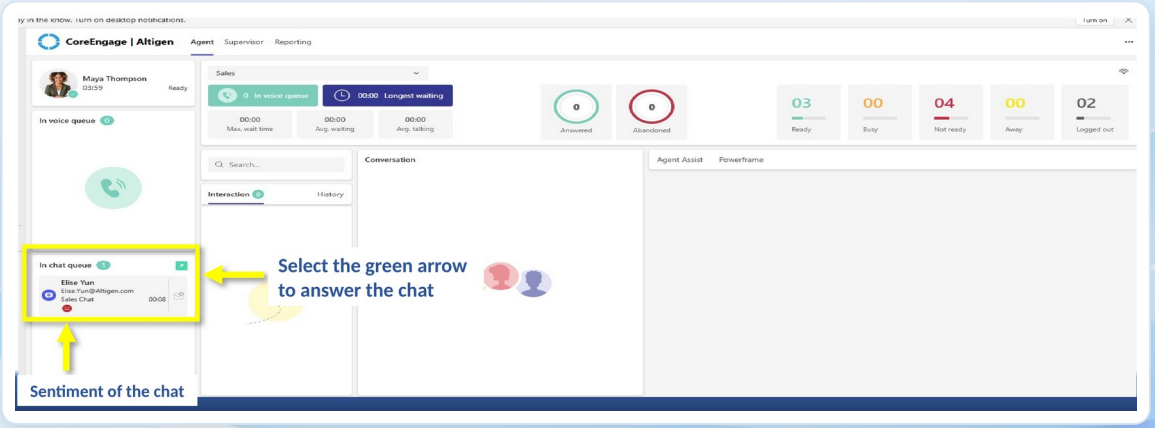
2. Select the green arrow on the chat to answer it.

Tip: The chat icon's color shows the customer's sentiment.

CUSTOMER VIEW



AGENT VIEW

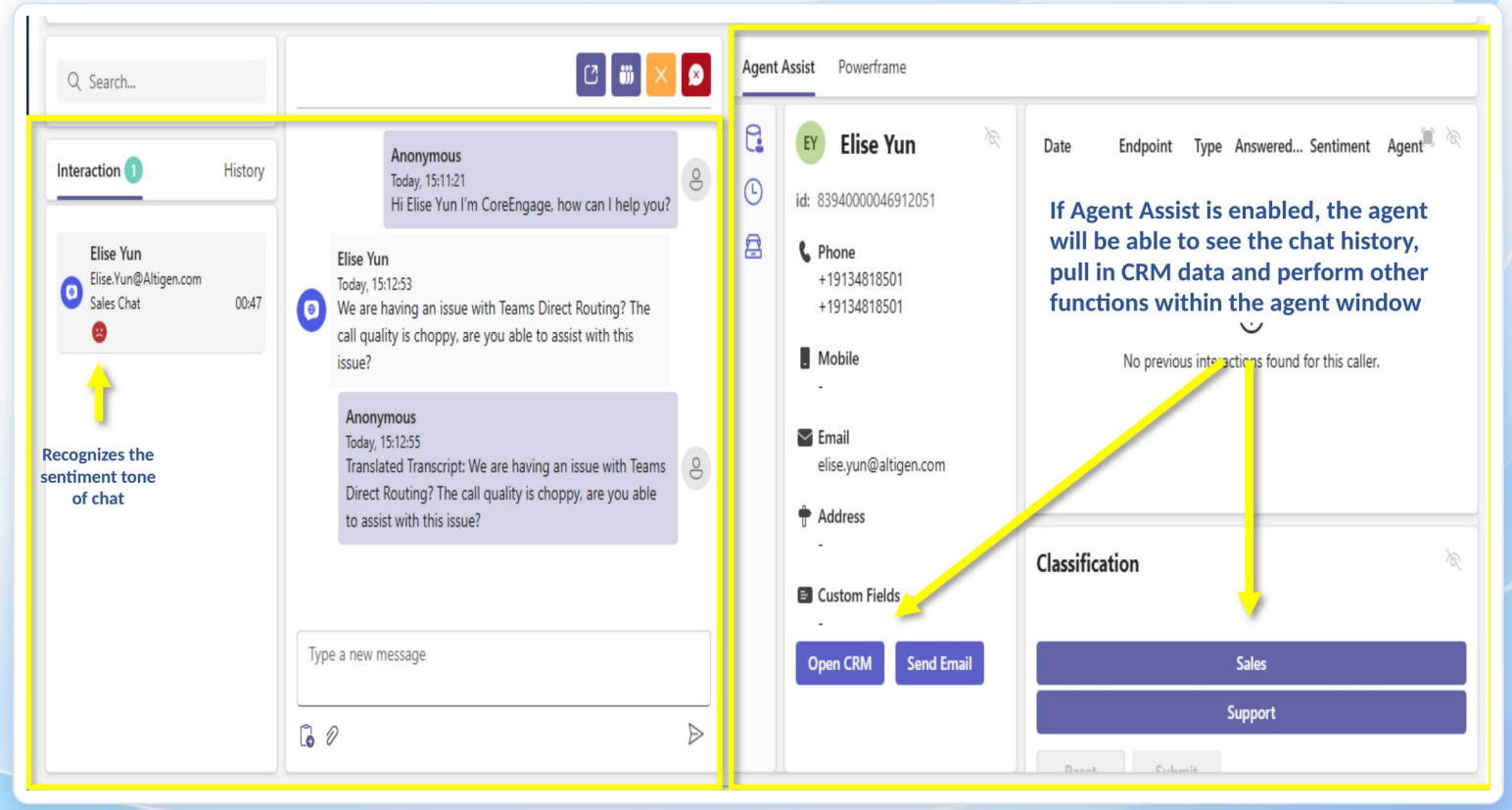


Respond in the Conversation

1. After you answer, the chat opens in your Interaction window.

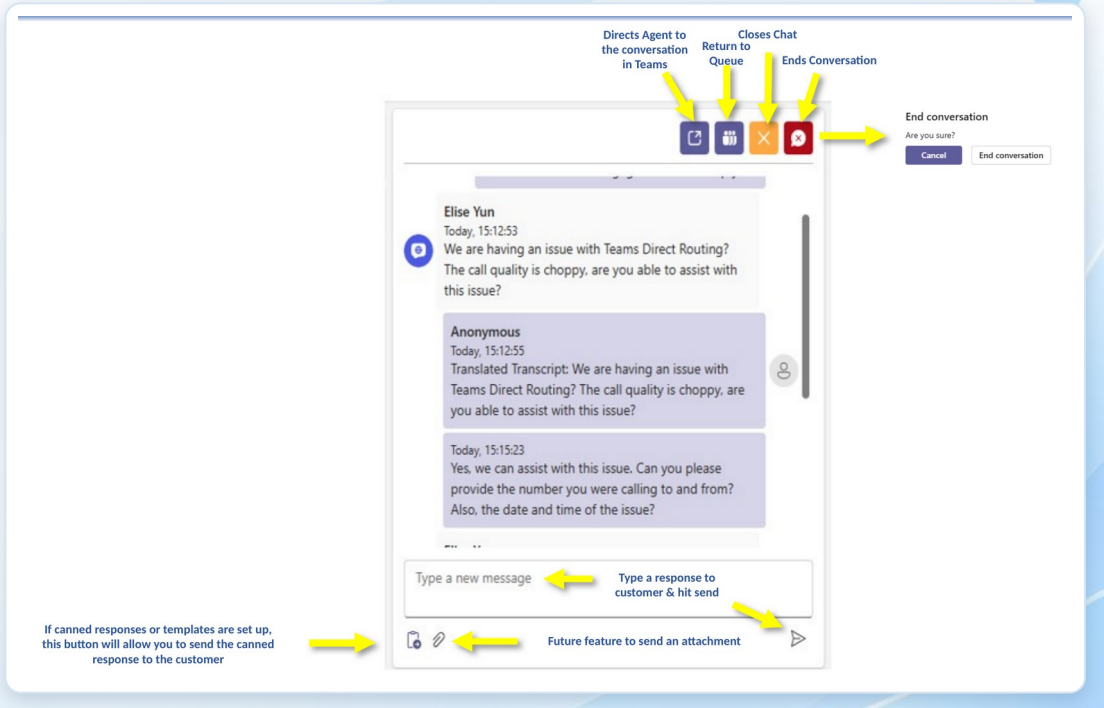
2. Type your reply to the customer and select Send.

Tip: With Agent Assist enabled, you can see chat history, pull in CRM data, and use other tools in the same window.



Conversation Controls

- **Conversation**
  Opens the conversation in Teams.
- **Return to queue**
  Sends it back to the queue for another agent.
- **Close**
  Closes it on your side only. It stays open for the customer.
- **End conversation**
  Ends it for you and the customer. Recommended.
- **Type a new message**
  Type your reply, then select Send.
- **Templates**
  Send a canned response, if set up in the admin portal.
- **Attachment**
  Coming in a future release.



Tip: These controls work the same way for email and SMS.

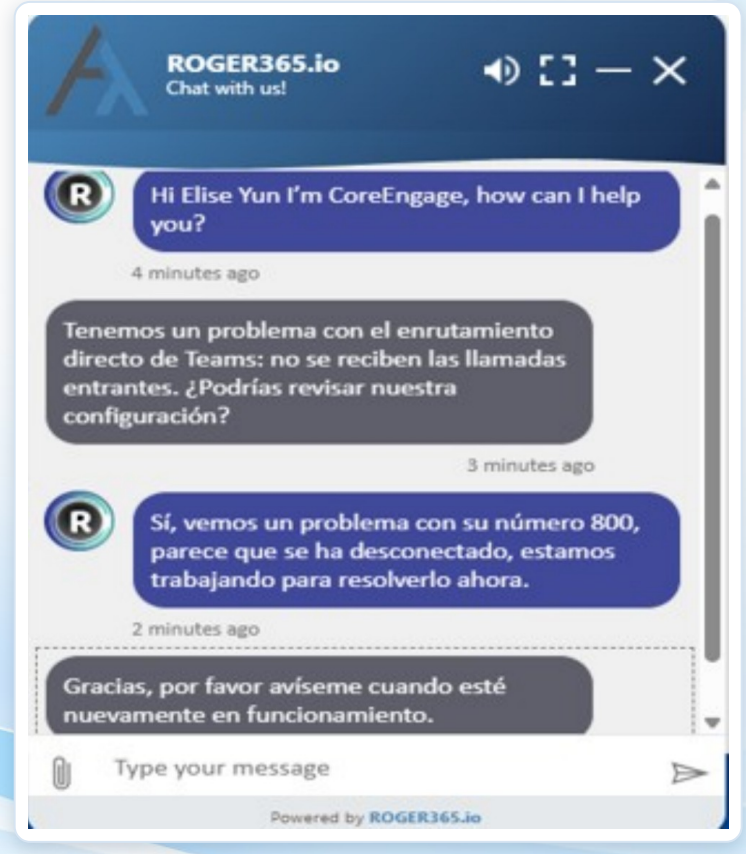
Translate Chats Automatically

CoreEngage detects the customer's language and translates it into English for you.

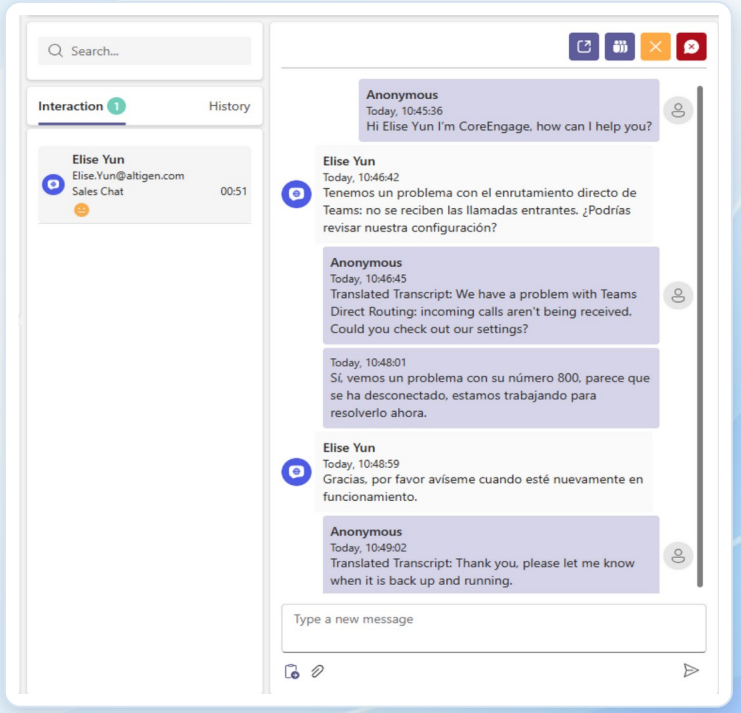
You reply in English, and the customer sees your message in their language.

Note: Your IT team must enable language translation in Microsoft Azure for this to work.

CUSTOMER VIEW



AGENT VIEW



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02

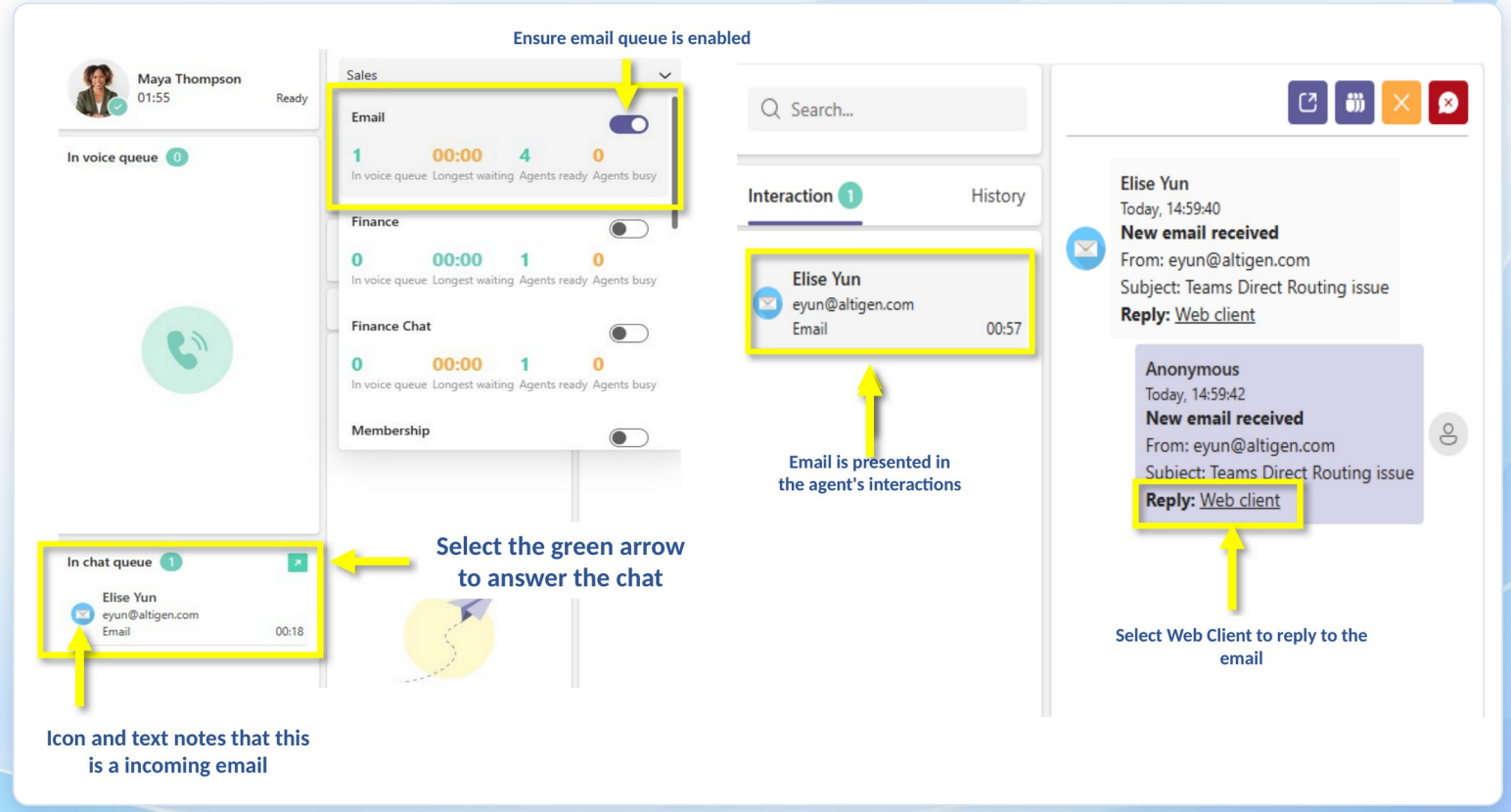
Email

Pick up customer emails and reply

Pick Up an Email

1. Make sure the email queue is enabled and your status is Ready.
2. Incoming emails appear in your messaging queue.
3. Select the green arrow to pick up the email.
4. The email opens in your Interaction window. Select Web Client to reply.

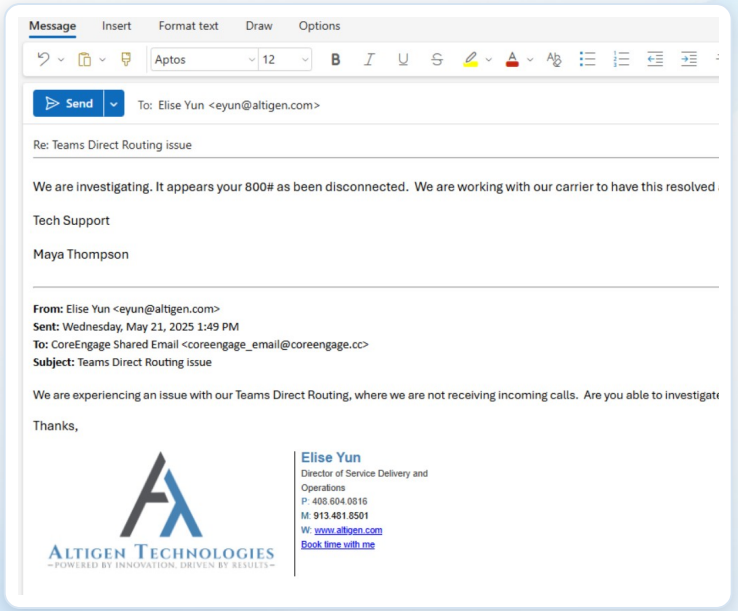
Tip: An email icon and label identify incoming emails.



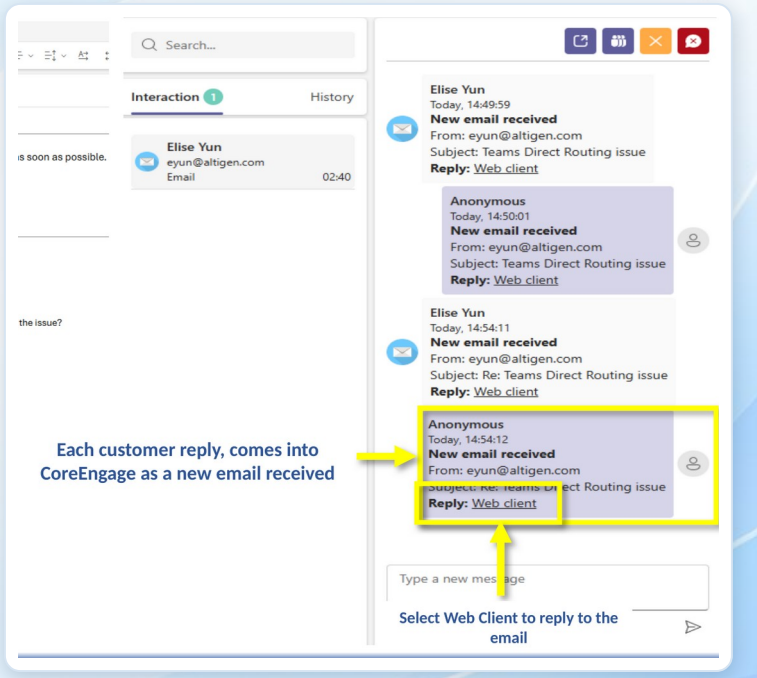
Reply Through the Web Client

1. In the web client, type your reply and select Send.
2. Each customer reply arrives in CoreEngage as a new email.
3. Select Web Client again each time you reply.

WEB CLIENT



COREENGAGE



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03

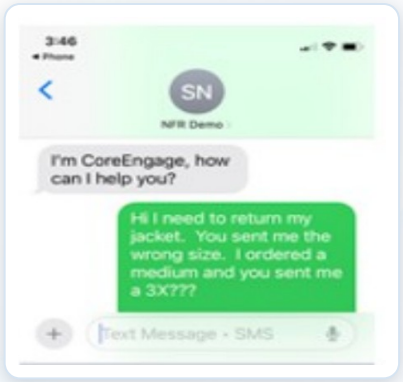
SMS

Answer and reply to customer text messages

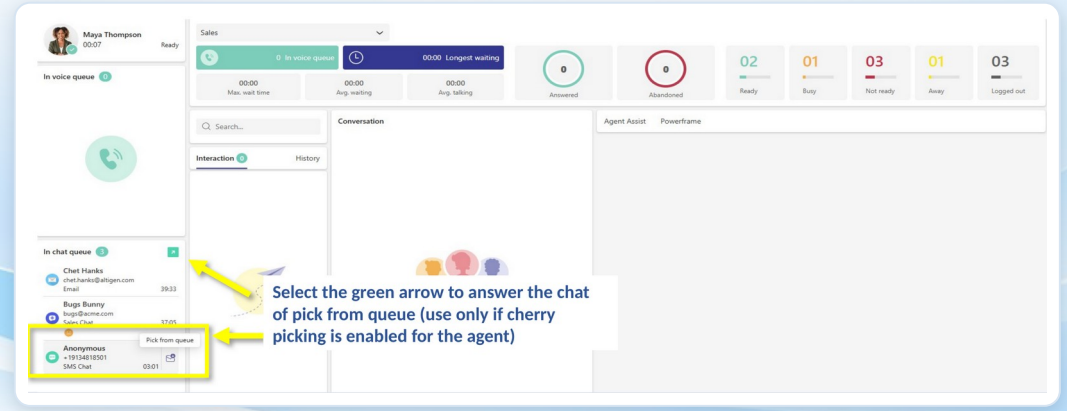
Answer an SMS

1. Agents in the SMS queue get a notification and see waiting messages.
2. Select the green arrow to answer.
3. If cherry picking is enabled for you, you can also select Pick from queue.

CUSTOMER VIEW



AGENT VIEW

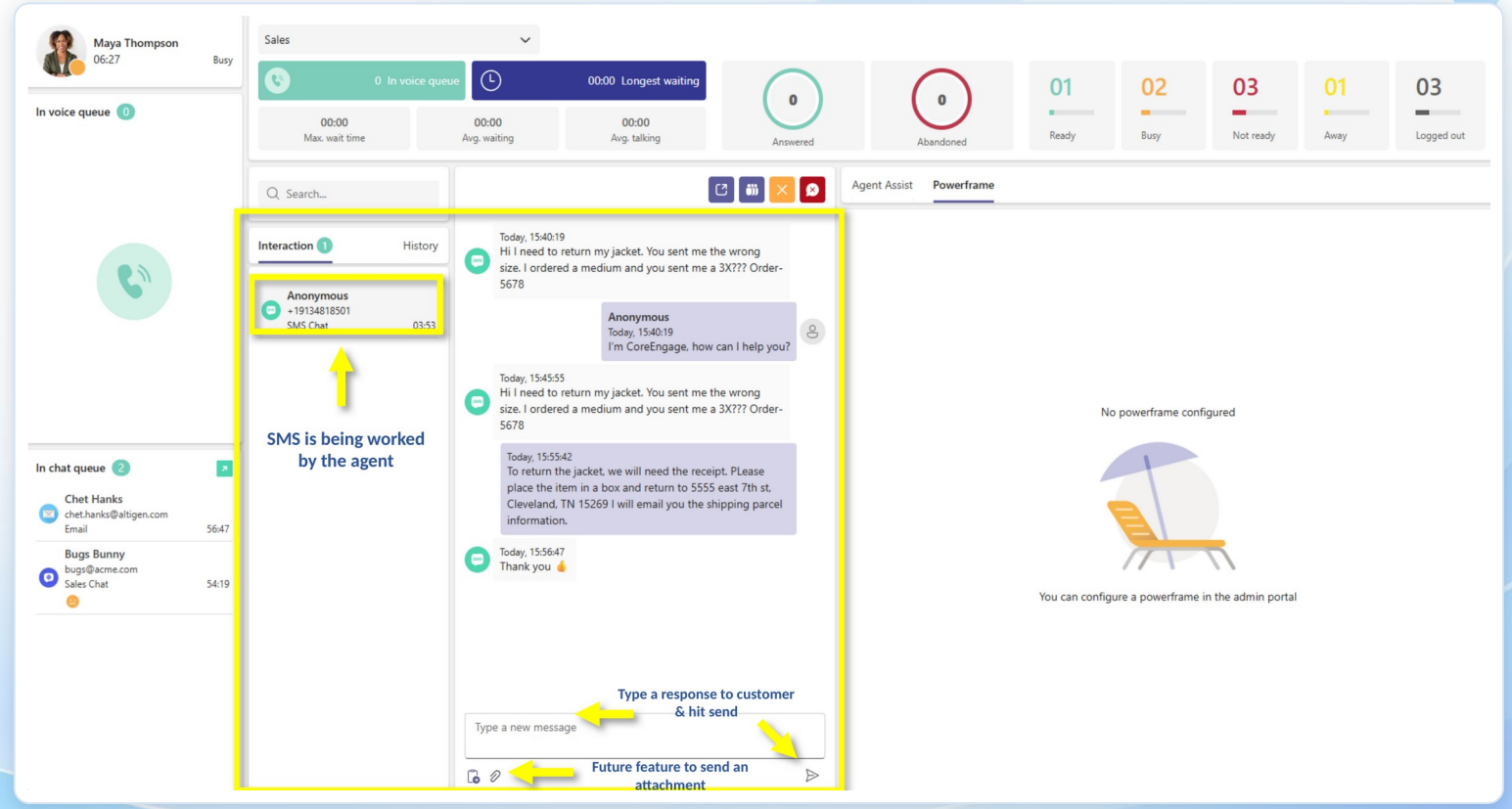


Reply to an SMS

1. After you pick up the message, it opens in your Interaction window and your status changes from Ready to Busy.

2. Type your reply in Type a new message, then select Send.

Coming soon: Sending pictures (MMS) and attachments is coming in a future release.



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04

Agent Assist

Caller context at a glance during voice calls

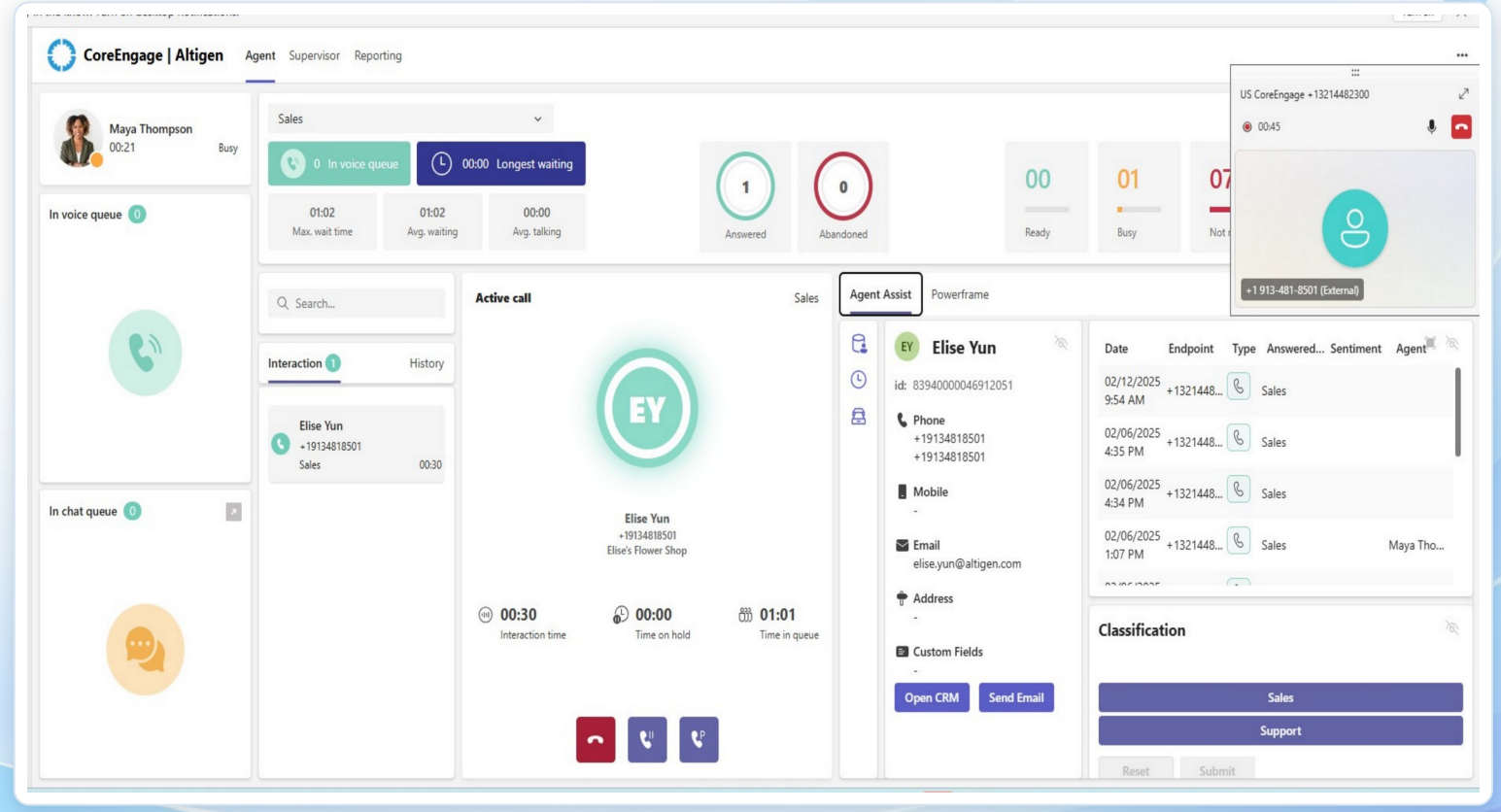
Agent Assist During a Voice Call

- **Answer as usual**
  Select the phone icon on the Teams notification, then handle the call in CoreEngage.

- **Caller details**
  Name, phone, email, and address, with Open CRM and Send Email buttons.

- **Interaction history**
  Past calls with date, endpoint, queue, sentiment, and agent.

- **Classification**
  Tag the call, such as Sales or Support, then select Submit.



Questions?

Thank you for attending CoreEngage Agent Training

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