Manage Customer Sessions

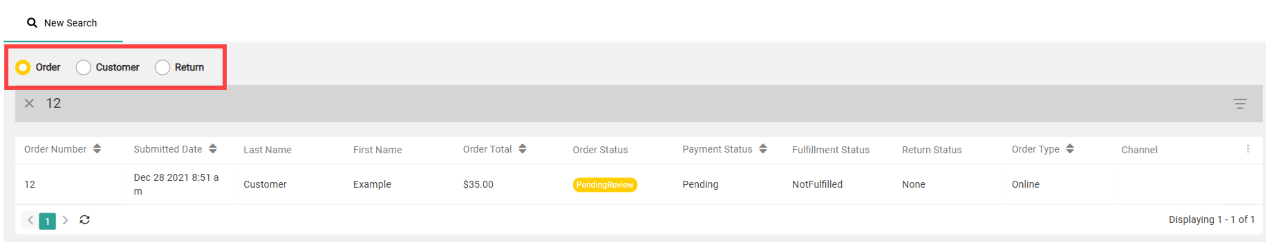
CSRs can quickly search for orders, customers, and returns directly from the Call Center and perform actions on them on the same page. This streamlines the resolution process by eliminating the need to switch between the separate Orders, Customers, and Returns UIs.

Multiple customer interactions can also be managed simultaneously by grouping related tasks within sessions, improving the service workflow and reducing the time spent on calls.

Search Tools

Use the radio buttons at the top of the search landing page to indicate whether you want to search for a customer, order, or return. Then, enter a query into the search bar.

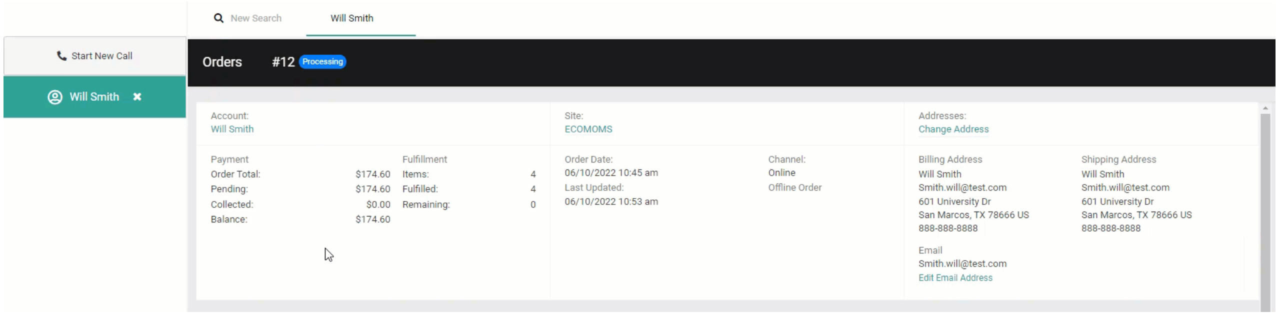
- Expand the filter menu on the search bar to open the Advanced Search options. These include all of the filters currently supported on the individual Customer, Orders, and Returns dashboards.
- Reorder the results by clicking the column headers to sort results by that value.
- Customize which columns are displayed in the search results table by expanding the menu in the top right corner and toggling columns on or off.



Create New Session

Sessions are created automatically as you look up a new request. To begin a session:

1. Click **Start New Call** if you are not already on the search landing page.
2. Perform a search for a customer, order, or return using the radio buttons.
3. Click any result. The session will appear in the left-hand sidebar using the customer's name.

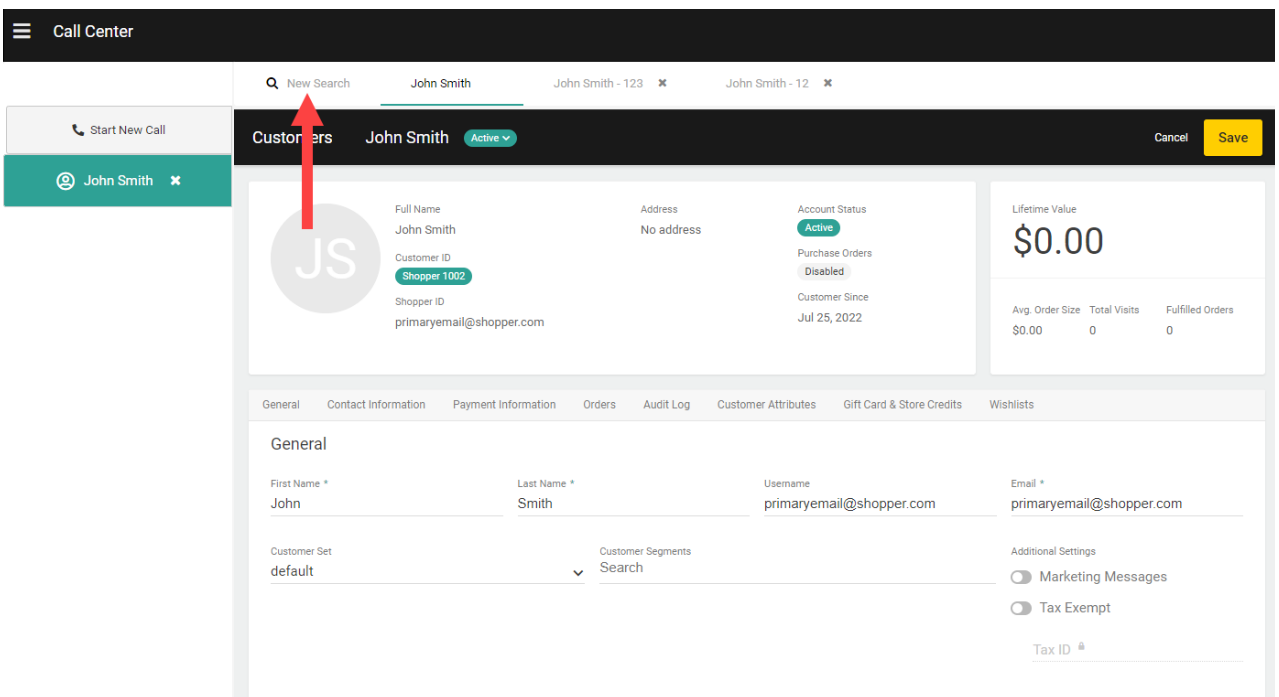


You can have up to a maximum of four active sessions, and attempting to create a fifth will replace the oldest one. Once you have completed all of a customer's requests, close the session by clicking the **X** in the sidebar.

Session Tabs

While viewing a session, click **New Search** to the left of the current tab. This will display the search page where you can input another query. Clicking on a result will open it in a new tab within that same session, but be aware that clicking a different order, customer, or return will replace the previous order, customer, or return tab respectively.

For instance, the below session contains tabs for the customer's details (John Smith), one of their orders (#123), and a return (#12). You can create up to a maximum of four tabs per session.



Manage Customers, Orders, and Returns

Once you are viewing customer, order, or return details, then you can perform management actions on them the same manner as their respective UIs. See the following guides for more context:

- Manage Customers
- Manage Orders
- Manage Returns

You can only update existing orders within the Call Center. New orders should be created directly in the Orders UI instead.