Live Chat
Quick Reference Guide

Live Chat Overview

Live Chat allows you to add live chat capability to your website by simply inserting a line of automatically generated HTML into your website.

A customer visiting your website can start a live chat with you with the click of a button.

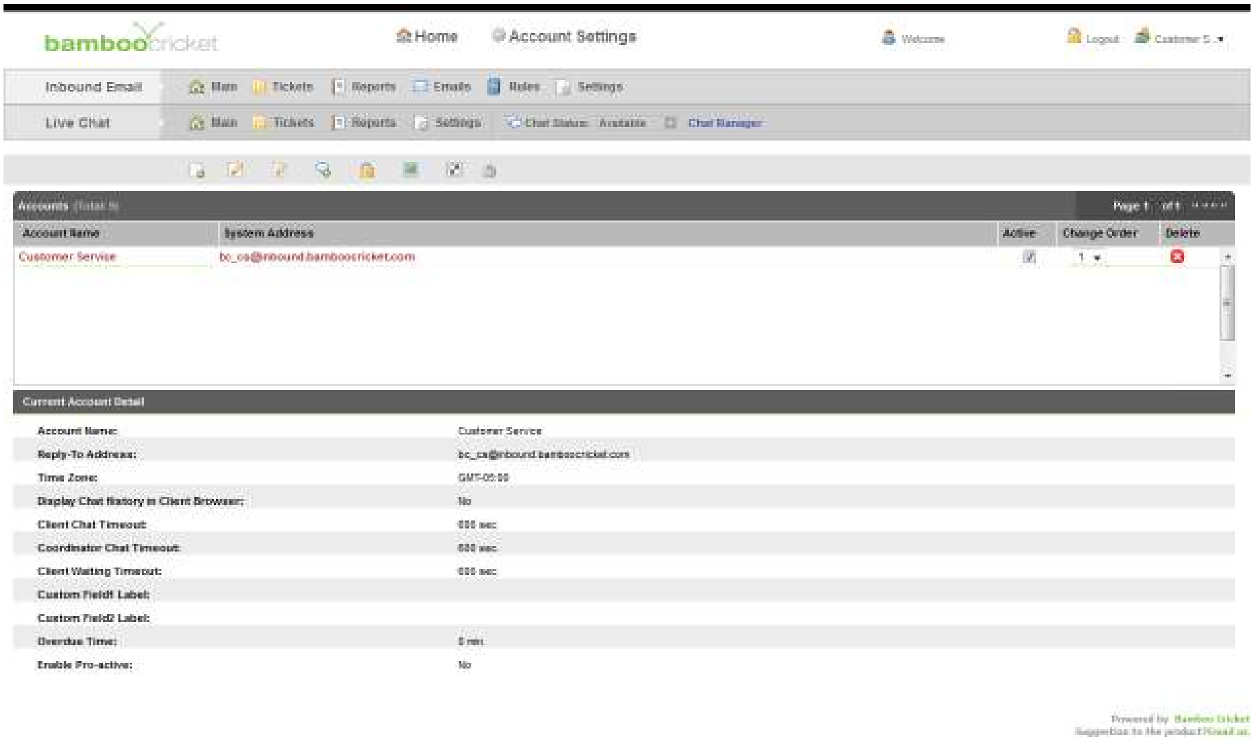
Set-up

Integrating Live Chat into your website

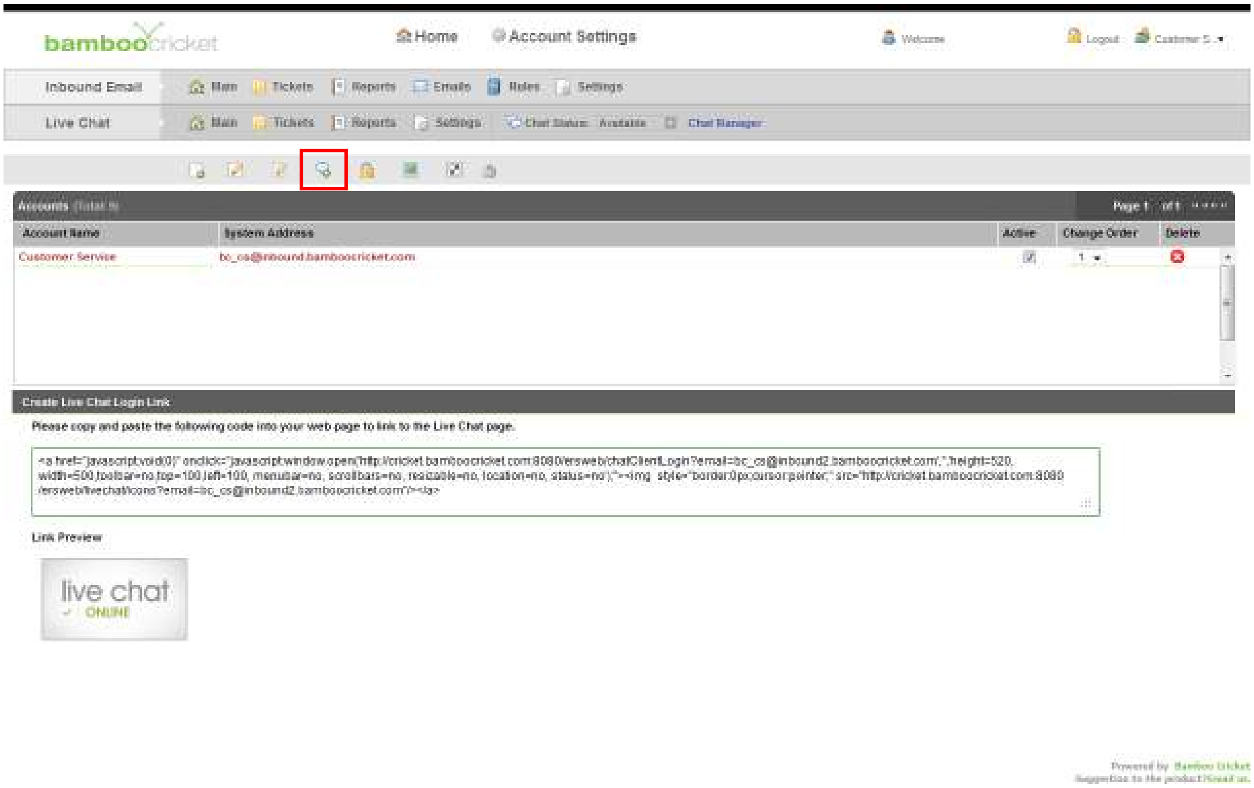
To integrate Live Chat into your website, just follow these simple steps:

1. Log in to Live Chat using your Administrator email address and password.

2. Select "**Account Settings**" at the top of the screen.



3. Click the “**Create Link**” option in the menu bar.



4. Copy the HTML in the lower right pane, and insert it into your website.

Please copy and paste the following code into your web page to link to the Live Chat page.

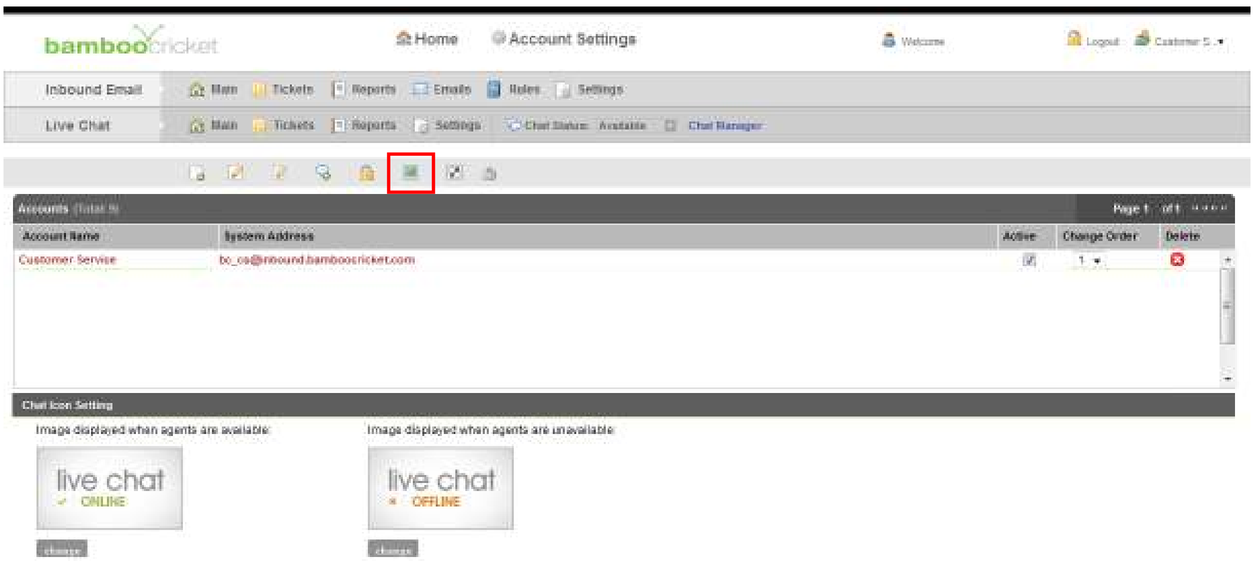
```
<a href="javascript:void(0)" onclick="javascript:window.open('http://cricket.bamboocricket.com:8080/ersweb/chatClientLogin?email=bc_cs@inbound2.bamboocricket.com','','height=520,
width=500,toolbar=no,top=100,left=100, menubar=no, scrollbars=no, resizable=no, location=no, status=no');"><img style="border:0px;cursor:pointer;" src="http://cricket.bamboocricket.com:8080
/ersweb/livechat/icons?email=bc_cs@inbound2.bamboocricket.com"/></a>
```

a. To pass up to 2 customized parameters to a Live Chat agent from a secure customer log-in page, please speak to your Bamboo Cricket representative for HTML code modifications or contact us at product@bamboocricket.com.

Choosing Live Chat Icons

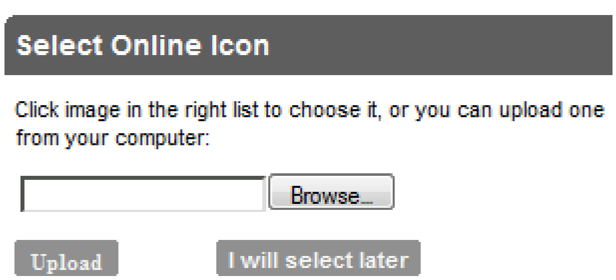
To pick the Live Chat icon you would like to use on your website, do the following:

1. Go to "**Account Settings**" at the top of the screen.
2. Highlight the account you would like to work with.
3. Click on "**Chat Icon Setting**" in the sub-menu.
4. From the "**Chat Icon Setting**" screen, you can either change the OFFLINE icon or the ONLINE icon by clicking on the "**Change**" button.



We have provided a wide range of icons for you to choose from. You can try and find an icon that matches your websites coloring scheme and look, or you can choose an opposite coloring scheme so that the icons stand out. If you have a set of custom live chat icons you would like to use, you can also use the upload your images and use them instead!

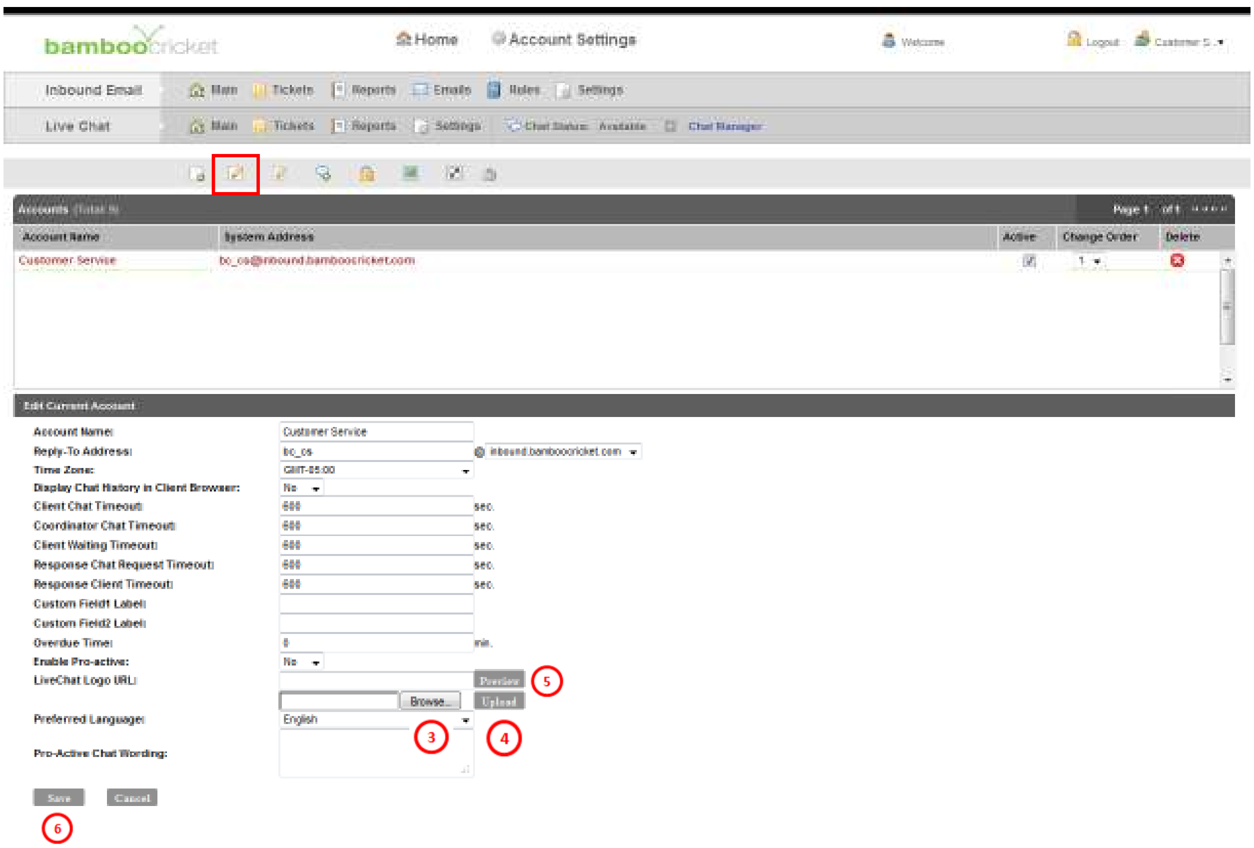
5. Click "**Browse**" to select the image you want to use.
6. Then click "**Upload**".

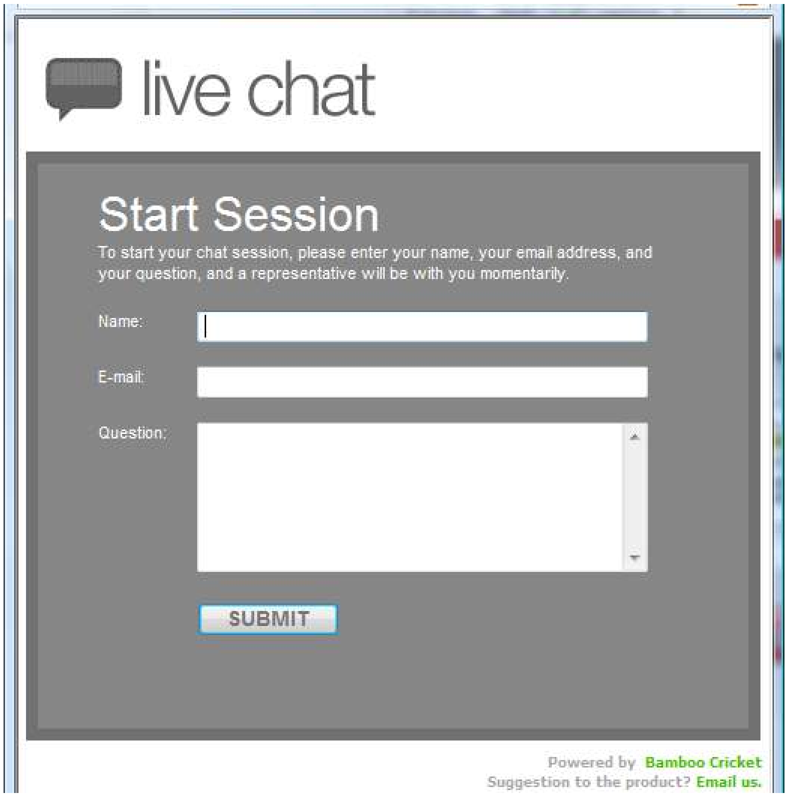


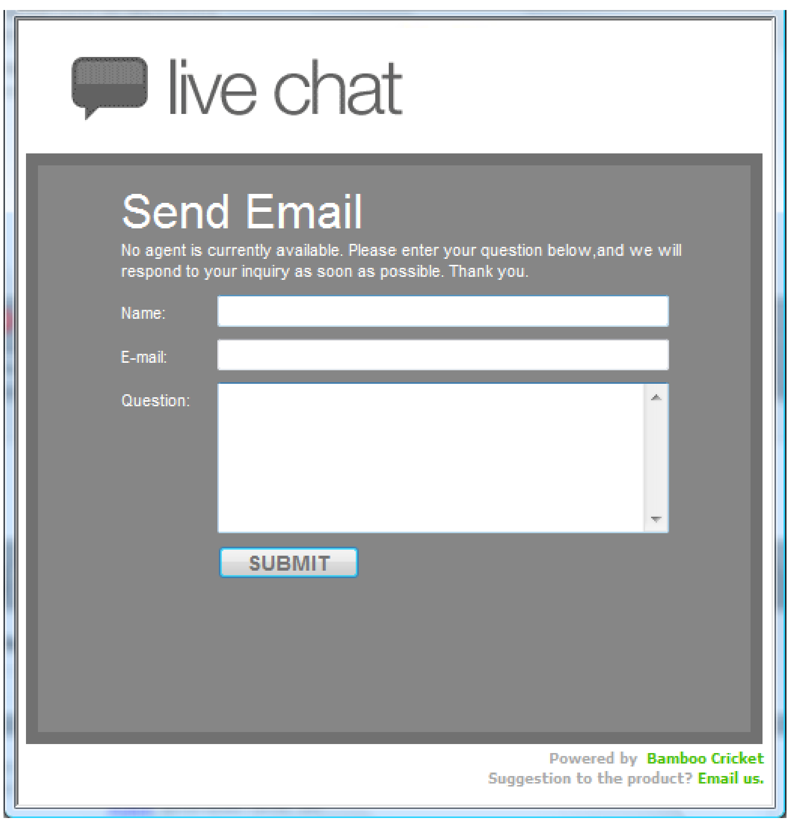
Adding your logo to the Live Chat window

To customize the Live Chat window with your logo, do the following:

1. Select “**Account Settings**” at the top of the screen.
2. Highlight the account you would like to work with and click the “**Edit**” option in the menu bar.
3. From the "**Edit**" screen, click "**Browse**" to select the image you want to use. The maximum image size is 500 pixels wide x 80 pixels high.
4. Then click "**Upload**".
5. Once the image is loaded, you can preview the Live Chat window by clicking "**Preview**".
6. Once you're satisfied with your image update, click "**Save**".




live chat
Start Session
To start your chat session, please enter your name, your email address, and your question, and a representative will be with you momentarily.
Name:
E-mail:
Question:
SUBMIT
Powered by Bamboo Cricket
Suggestion to the product? Email us.


live chat
Send Email
No agent is currently available. Please enter your question below,and we will respond to your inquiry as soon as possible. Thank you.
Name:
E-mail:
Question:
SUBMIT
Powered by Bamboo Cricket
Suggestion to the product? Email us.

Usage

Setting Agent Live Chat Status

When agents log in to the Live Chat application, they will by default have their chat status set to "**Available**".

It is possible that while the agent is logged in that they may have to change their status to "**Chatting…**", or "**Unavailable**" so that live chat requests aren't sent to that agent.

The Live chat status can be changed by the agent by selecting a status from the drop down in the upper left corner.

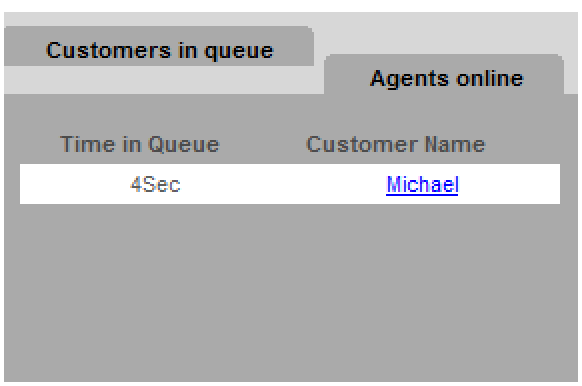
An agent is only able to hear the audible chime, or have chats transferred to them while their status is set to "**Available**".

Accepting Chat Sessions

When a customer clicks on the Live Chat icon on your website, your agents will be alerted by a chime, and a notification below their chat status.

By clicking on this link, a list of all of the requests for Live Chats will be displayed.

This Live Chat queue list shows all of the requests that have come in, and who the requestor of the chat is. The information in this window is sorted by when the request arrived, and the amount of time in queue.



By clicking on the username, a Live Chat can be initiated with the customer.

The Agent Chat Window

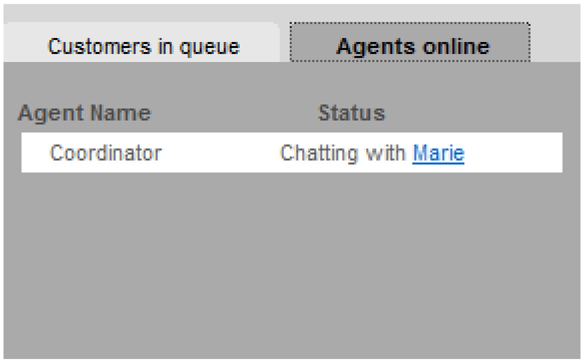
The agent chat window is opened as soon as a chat request is selected from the Live Chat queue.
In addition to facilitating the communication between the agent and the client, this window also allows the agent to transfer a chat to a more suitable customer service representative, as well as draw information from the knowledge base so your client can be served in a more consistent and timely fashion.

Often users will return to live chat to ask additional questions. To save time, the agent chat window will automatically display the previous chat history. In this way, all of your agents will have the ability to review past problems your client has had, and move more quickly to resolve their questions.

1. The user can send a file to the customer that he is chatting with.
2. The user can send a transcript of the chat session to another person. If the chat session contains "whisper" information from a Monitoring Agent, then the user can choose to send the "Customer" version to the customer where the whisper portion of the chat is removed. The user can send the "Full" version to the Monitoring Agent or another colleague within the company.
3. The user can clear the text box and start fresh.
4. The user can send a copy of the transcript to the printer.

Monitor/Whisper Mode

Sometimes, a supervisor would like to monitor the chat session of a new agent to ensure the customers are being serviced properly. The Monitoring Agent would click on the "**Agents online**" tab, and click on the session that he/she would like to monitor.



On the Monitoring Agent side, the Monitoring Agent can whisper to the chatting agent, take over the chat session altogether, or quit monitoring the session. The name within the bracket shows the Monitoring Agent which chatting agent he is monitoring.

On the left hand side of the screen, both the Monitoring Agent and the chatting agent can see what is whispered by the Monitoring Agent (in red).

On the chatting agent side, the chatting agent can whisper to the Monitoring Agent. The name in the bracket shows the name of the Monitoring Agent.

On the left hand side of the screen, both the Monitoring Agent and the chatting agent can see what is whispered by the Monitoring Agent (in red).

Using the Knowledge Base in Chat

Knowledge base articles entered into the system can be easily accessed while in a Live Chat.

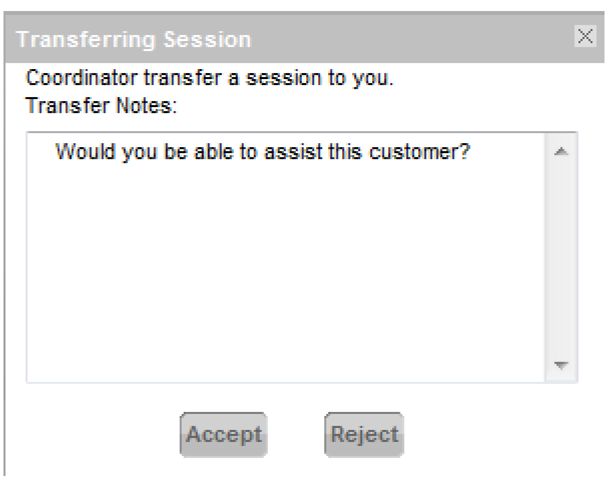
See instructions further down in the Knowledge Base section.

Transferring a Chat Session

When an agent finds that they are unable to satisfactorily answer a customer's question, they may transfer the customer and the chat history to another agent who is logged into the system.

When the agent clicks on the "**Transfer Chat**" link directly above the chat text window, the right most pane switches from the Knowledge Base interface to a list of agents that are currently logged into the system that have their Live Chat status set to "**Available**".

The agent who is receiving the Live Chat transfer request has the ability to accept or refuse the Live Chat transfer.



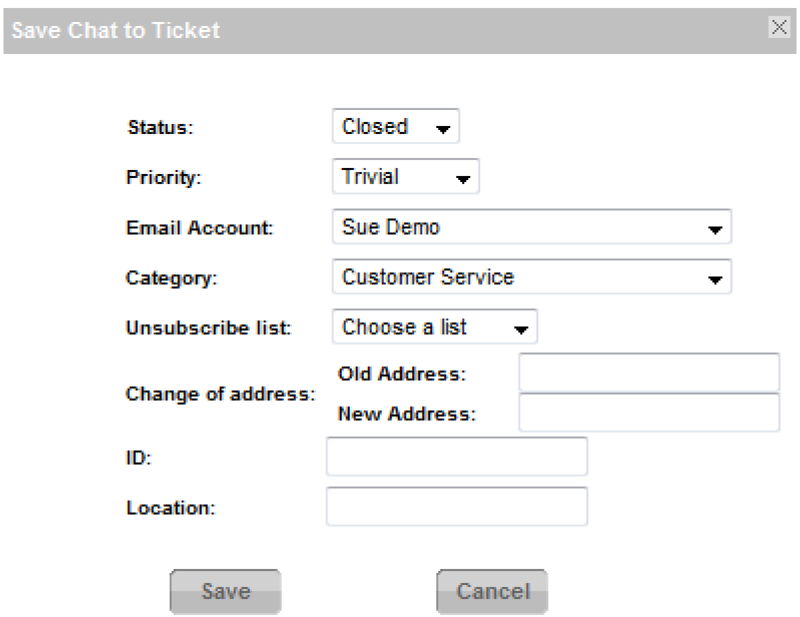
If the agent the transfer request was sent to accept the live chat request, the agent will be automatically disconnected from the chat, and the new agent will have the entire chat history displayed in their window.

Closing Chat Sessions and Saving the Live Chat Ticket

When the agent has completed the Live Chat session, there are three possible outcomes:

- The agent successfully answered the customer's question, and no further action Is required
- The agent was unable to answer the customers question at that time, and will need to contact the customer after they've completed their investigation
- The agent will be unable to satisfactorily resolve the customer's question, and will require the intervention of a customer service representative more capable of handling the issue

To end a Live Chat session, the agent can click on the "**Save Chat**" button. Doing this will open the saving screen:



The possible values for Status are:

- **Open** – This option will leave a Live Chat ticket in the open status for another agent to process. This is used when the agent who accepted the chat was unable to help the customer
- **Claimed –** This option will assign the chat to agent who accepted the chat request. The agent is responsible for finding a final resolution to the problem
- **Closed** – This option means that no further action is required to resolve the customer's problem.

The agent also must categorize the Live Chat session. The possible values for the category option are defined by the folders that have been created for the client.

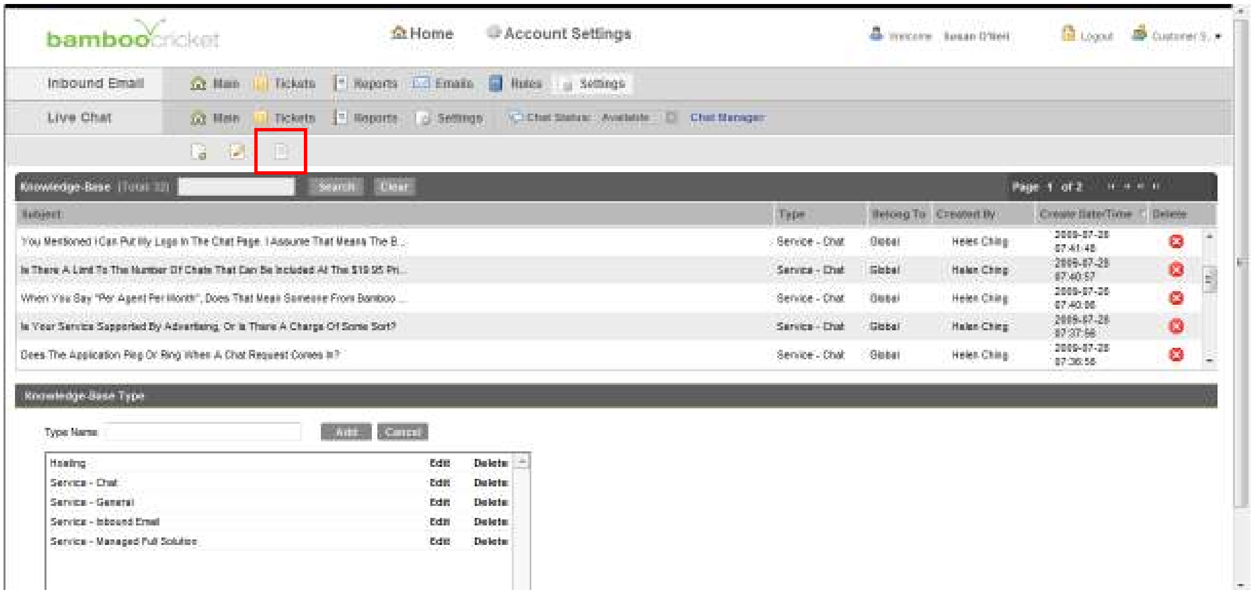
It's possible that the Live Chat request was from a user subscribed to a newsletter. By selecting the list they want to unsubscribe from in the "**Choose a list**" drop down, they will be added to the list of users who have unsubscribed, and can be exported from the Live Chat Statistics Report.

Often users will contact a customer service representative to change their email address. When this occurs, the agent should enter the old email for the user in the "Old Address" field, and the new address in the "New Address" field. By doing this, when visiting the Live Chat statistics report, an entire list of people who have requested their email address be changed can be exported.

After all of the information has been entered, the agent can choose to "**Save**" the Live Chat, or click "**Cancel**" to return to the chat window to review the Live Chat History.

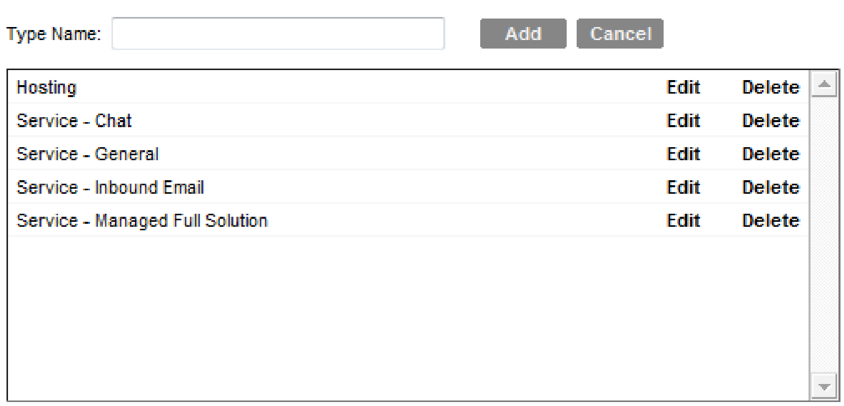
Creating Knowledge Base Types

To create a new knowledge base group, click the “**Type**” icon.



On this screen there is the ability to create a new Knowledge Base category, Edit an existing category, or delete a category.

To add a new category, enter a name, and click on the “**Add**” button.

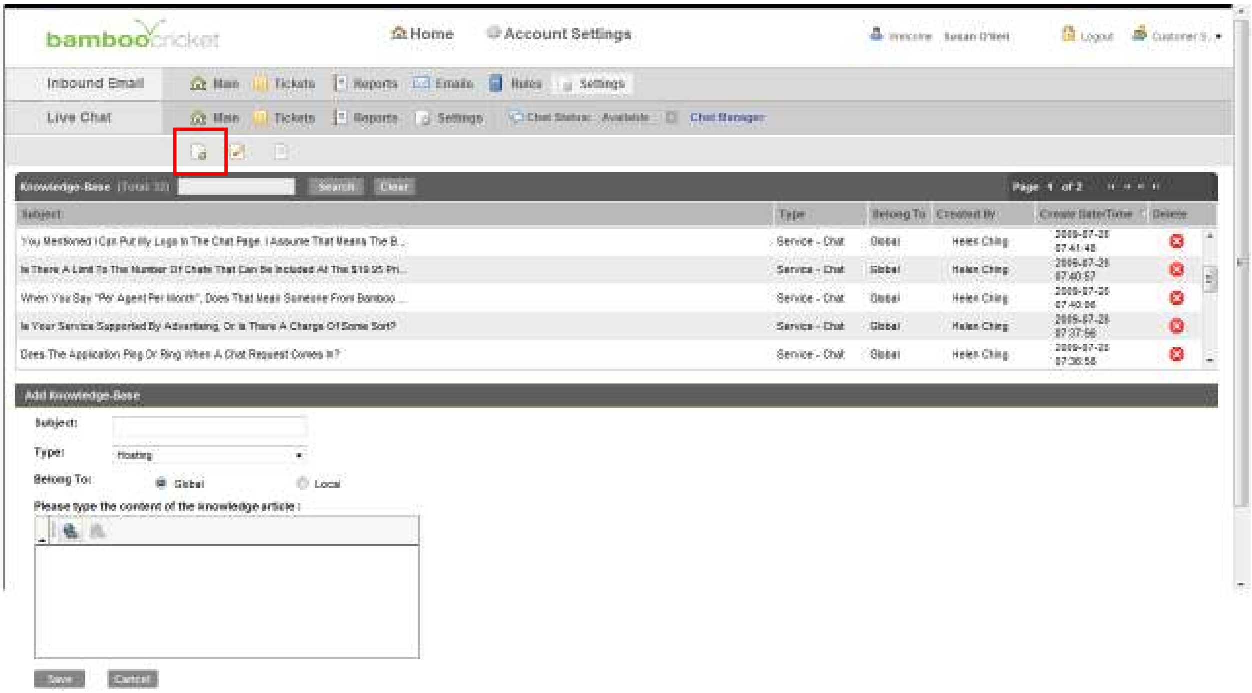


Clicking on “**Edit**” will allow the name of the Knowledge Base category to be modified.

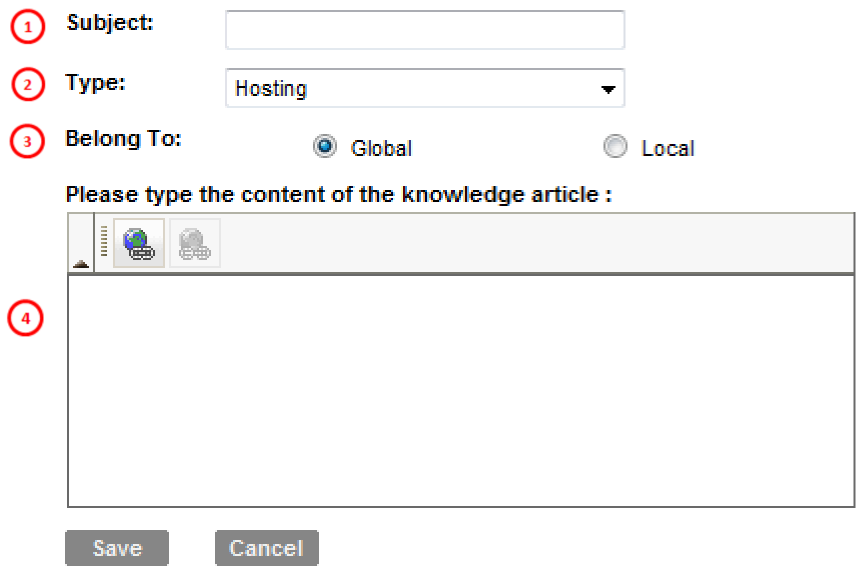
Clicking on “**Delete**” will remove the category. Be aware that by deleting a category you will remove the coordinators ability to use knowledge base articles assigned to that category until they are reassigned.

Creating a Knowledge Base Article

To create a knowledge base article, select the “**Add**” icon from the menu bar



After clicking “**Add**” there are several fields available:



1. **Subject**

   The subject will be a small description of the knowledge base article

2. **Type**

   The type will dictate which category the article is for. Details on how to create Knowledge Base categories is discussed at a later point in this chapter

3. **Belong To**

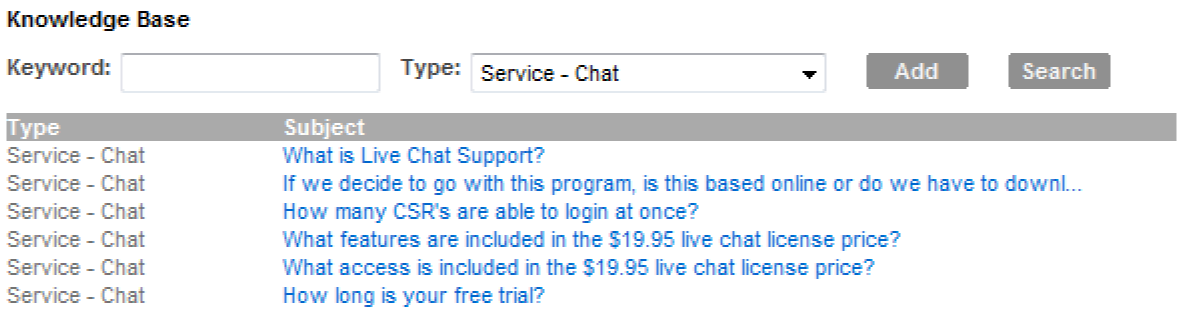
   When creating a knowledge base article, take a moment to determine if all of your accounts are going to require access to this article. If one account is setup to handle customer requests for information, knowledge base articles containing information on supporting your product may not be required.

4. **Knowledge Base Article Details**

   This portion of the create knowledge base article screen is where the details of the knowledge base article can be entered.

Using the Knowledge Base in Chat

Knowledge base articles entered into the system can be easily accessed while in a Live Chat.



At the bottom of the chat window are all of the knowledge base articles. A search bar is available to allow your agent to quickly search the knowledge base based on a keyword or a type. Matching articles will be displayed, and by clicking on the title of the knowledge base article, it will automatically pre-populate the agents chat area with the article's details.

Sometimes only a portion of a knowledge base article is required to answer a customer's question. When this occurs, the agent can simply highlight the relevant portion of the knowledge base article, and drag it into the agents chat area.

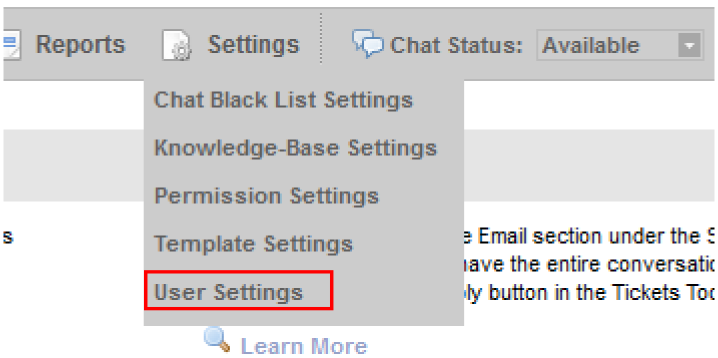
User Management Settings

Live Chat allows for the creation of multiple users. Because ticket processing is sensitive to who claims a ticket, a user cannot be logged into the application more than once.

Upon the initial login, there will only be one user account created.

Adding a new User

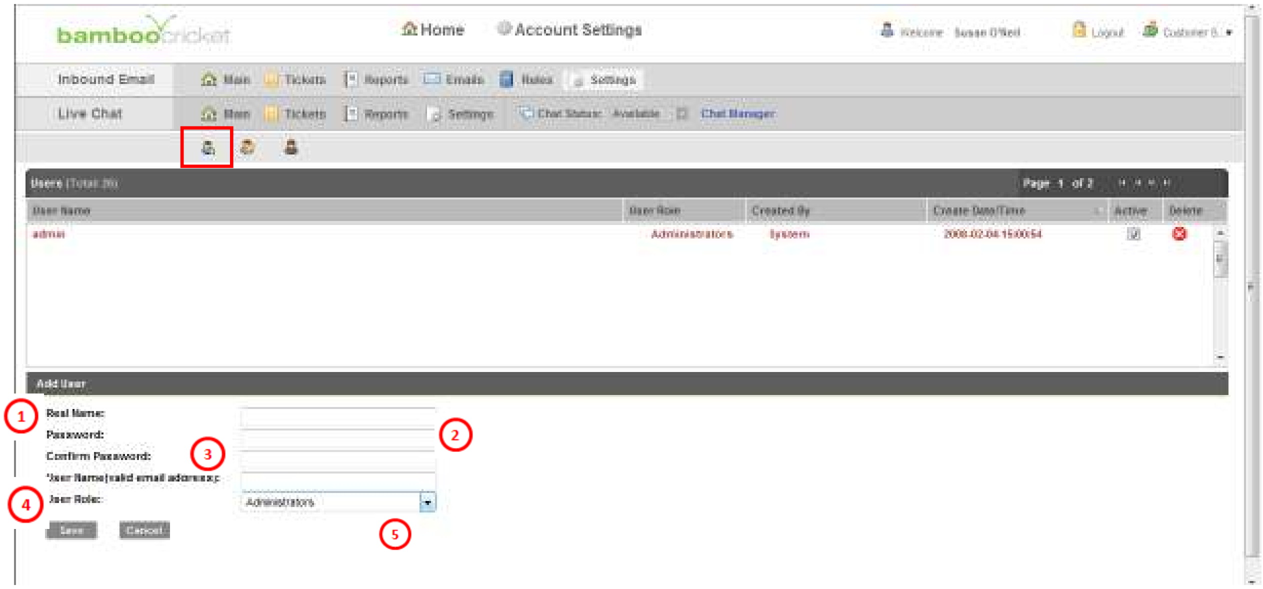
To administer users, select the Setting icon from the menu bar, and choose the "**User Settings**" menu option.



Adding a new user is a two-step process.

Step 1 – Basic User Settings

Enter identification information for the new user:



1. **Real Name** – This is the name that the user will be identified by in the application. When claiming a ticket, or conducting a chat, this is the name that will be displayed. It is important to note that the user name is not used for logging in to the system.

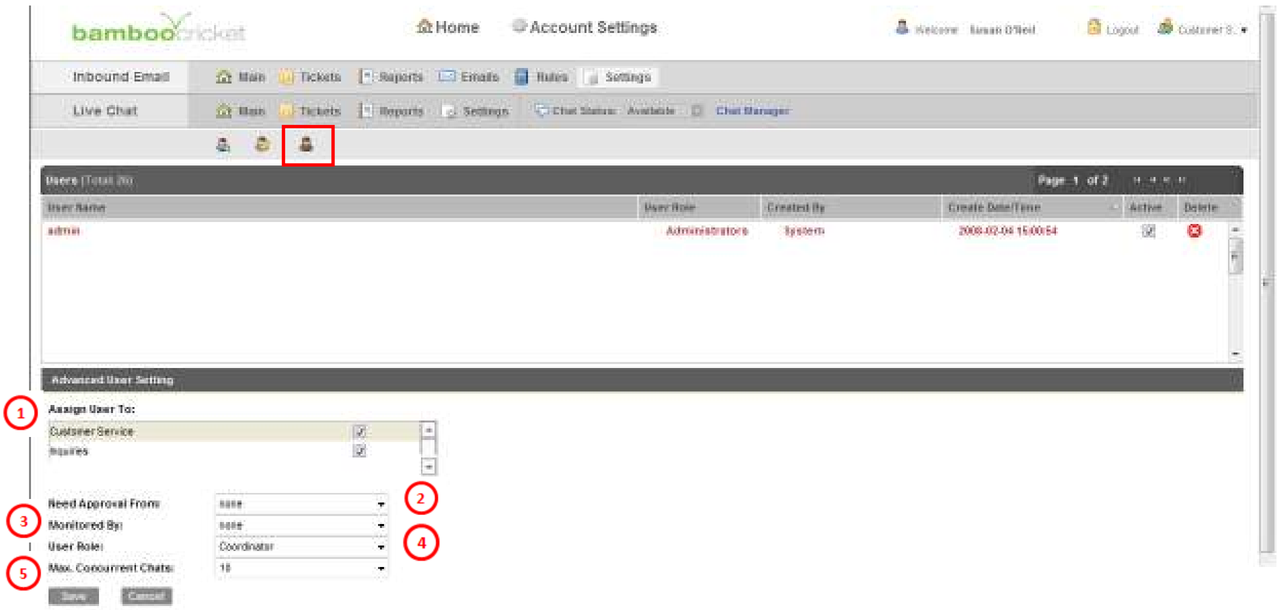
2. **Password** – This is the password that the user needs to use to log in to the system

3. **Confirm Password** – Confirm the password

4. **Username** – When logging in to the Live Chat application, the user will use this email address

5. **User Role** – Users can be created with different permission levels. Some users should only be able to see reports, while other should only be able to conduct live chat sessions. For more details see the chapter on User Roles.

Step 2 – Advanced User Settings



1. **Assign User To** – Select the sub-accounts the user has permission to access. Note: this option will only appear for "non-Administrator" roles.

2. **Need Approval From** – When training a new coordinator, it may be necessary to review their work. If an option is selected for this field, any email sent to a customer by an coordinator must first be approved by user specified in this configuration.

3. **Monitored By** – Sometimes it is necessary to have another user monitor the processing capabilities of another user. The user specified in this field will have the ability to review the tickets processed by the coordinator.

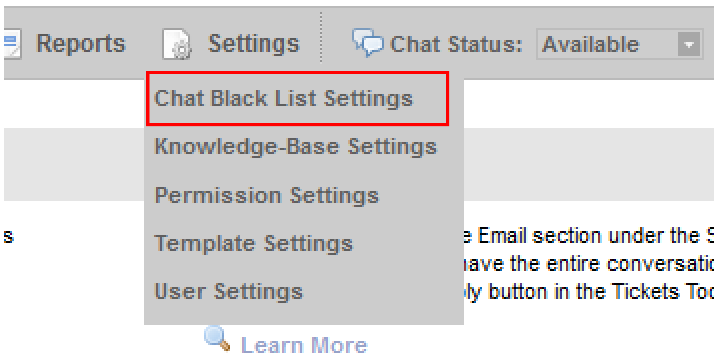
4. **User Role** - Users can be created with different permission levels. Some users should only be able to see reports, while other should only be able to conduct live chat sessions. For more details see the chapter on User Roles.

5. **Max. Concurrent Chats** - The user can accept up to the maximum number of chat sessions at one time.

Chat Black List Settings

If the user would like to block chatting with a specific email address or IP address, he can use the Chat Black List to enter those email addresses or IP addresses.

To administer Chat Black List Settings, select the Setting icon from the menu bar, and choose the “**Chat Black List Settings**” menu option.



The user can import a list of email addresses or IP addresses he would like the system to block (the information should be in .txt format), or export the existing list that is currently in the system.