Bold360 Agent DIY Deployment Guide

The purpose of this document is to provide step by step instructions on how to deploy live chat on your website. In order to be concise, we have included all required configuration items as well as some recommended best practices. Some elements detailed in this guide (i.e. Chat Button definition, Chat Window definition, Website label, Auto-Invite Ruleset and optionally a Department designation) must be associated to the generated code snippet that will be deployed to your website. These elements may have additional setup and configurations as detailed below.

Note: *Required elements, by default, are preconfigured and provided to assist you in getting your first deployment up and functioning quickly. They can easily be customized/configured before or after the code snippet is deployed to meet your needs. For additional website deployments you would simply create new elements, associate them to the code snippet and configure them as desired.*

For more granular training, visit **Bold360 University.** For additional questions that you may have or more detailed instructions, please visit our **support center.**

Table of Contents

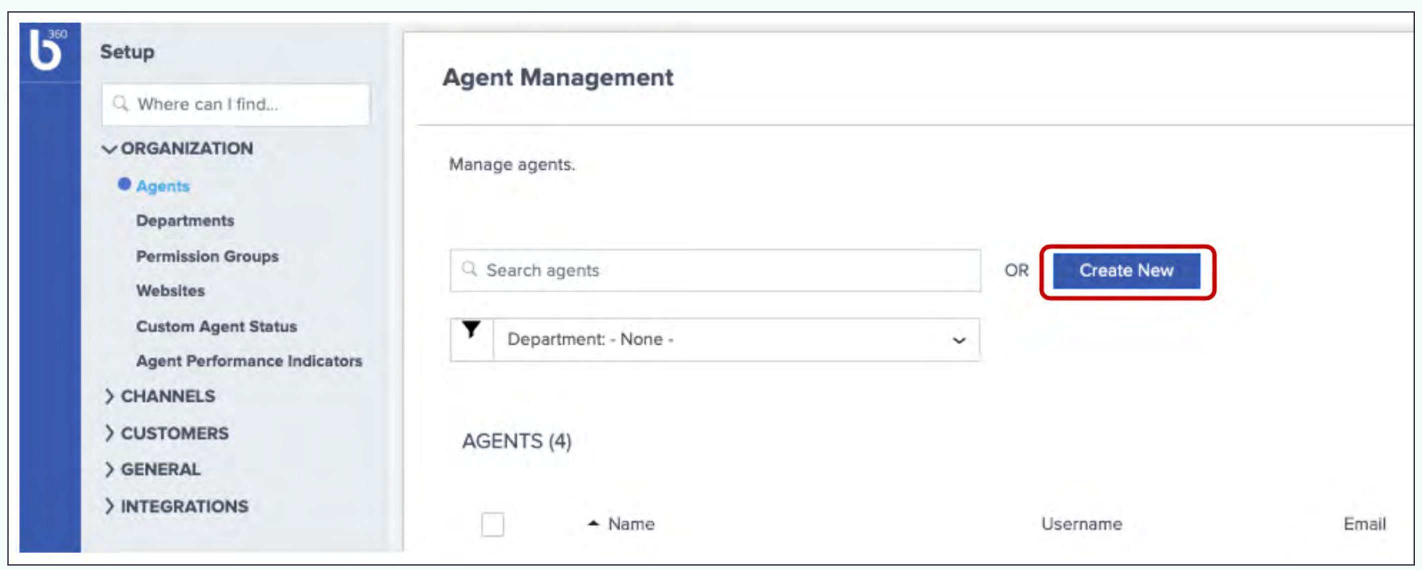
STEP 1 | Create Agents

This is where you'll add all users: agents, supervisors and administrators. For each user you add, you will set their name, email and give them ability to chat. Agents will operate out of the Bold360 agent workspace which can be accessed at agent.bold360.com.

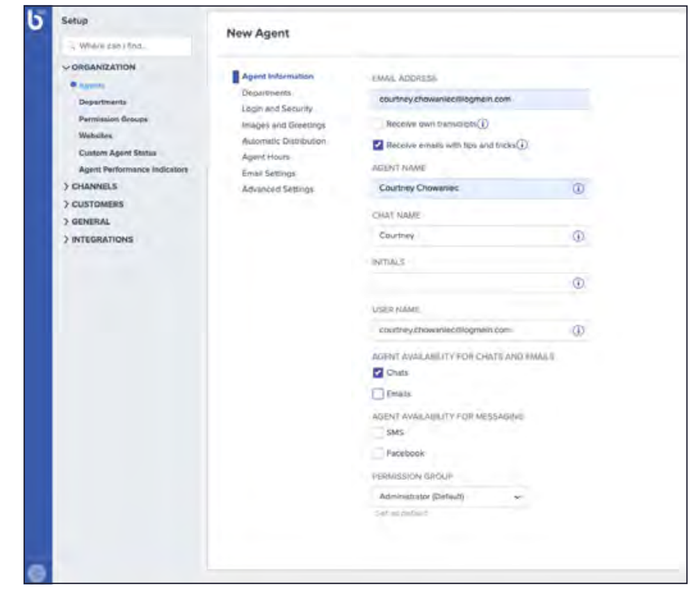
To see the below steps in action, view our tutorial video [here](#).

1. From [admin.bold360.com](#), click **Organization** > **Agents.**

2. On the Agent Management page, click **Create New.**

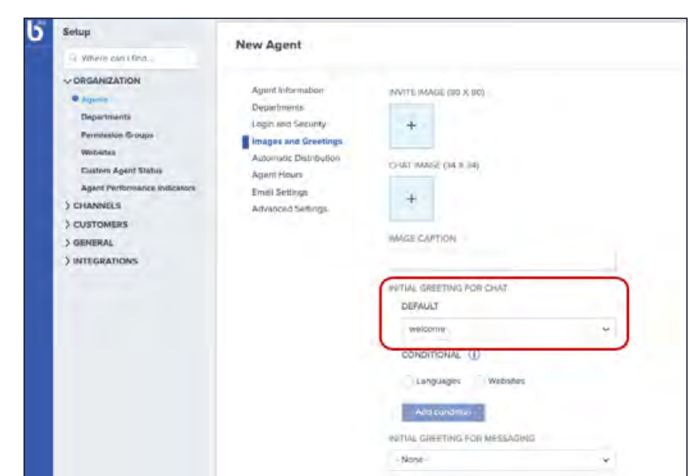


3. Fill out most important agent information:
   - **Email Address**
   - **Agent Name** - Full name
   - **Chat Name** - Typically this is the agent's first name. Customers will see this name.
   - **User Name** - Email address



   - **Agent Availability for Chats and Emails** - Ensure **Chats** is checked.
   - **Permission Group** - Either Administrator or Operator depending on this person's role. As you become more comfortable with your deployment, you may want to customize these existing permission groups or add new permission groups. To do so, you can follow instructions outlined [here](#).

   Note: *You will always want to have at least one user designated as Administrator in order to have full access to the admin console.*



4. Navigate to **Images and Greetings.** Under **Initial Greeting for Chat** > **Default,** select **welcome.**

5. Click **Save.**

STEP 2 Create Department(s)

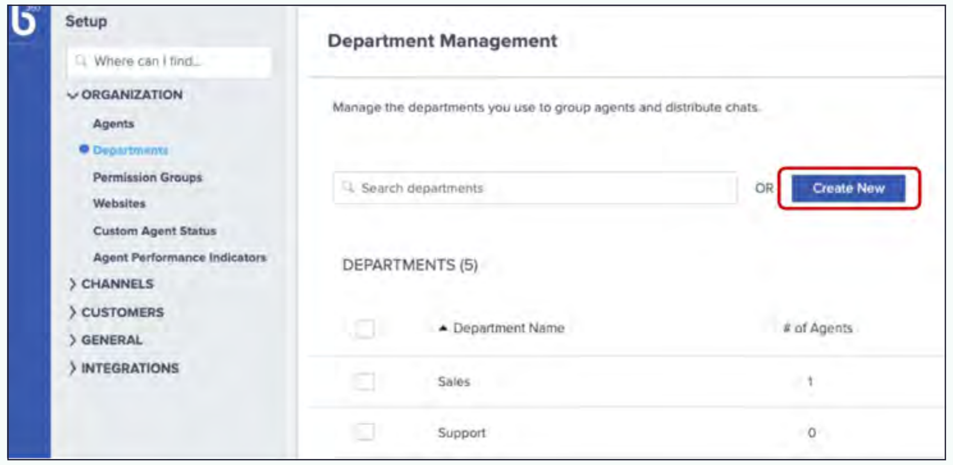
Departments may be just that – departments or business units. They may also differ from the actual ‘departments’ within your business due to language or skill groups. Within Bold360, departments control how agents are grouped and how chats are distributed.

To see the below steps in action, view our tutorial video here.

***Note:** In simple deployments, you may only have one department and that’s okay. Setting up that department will help keep your deployment organized and set you up for success as your organization’s digital engagement strategy matures.*

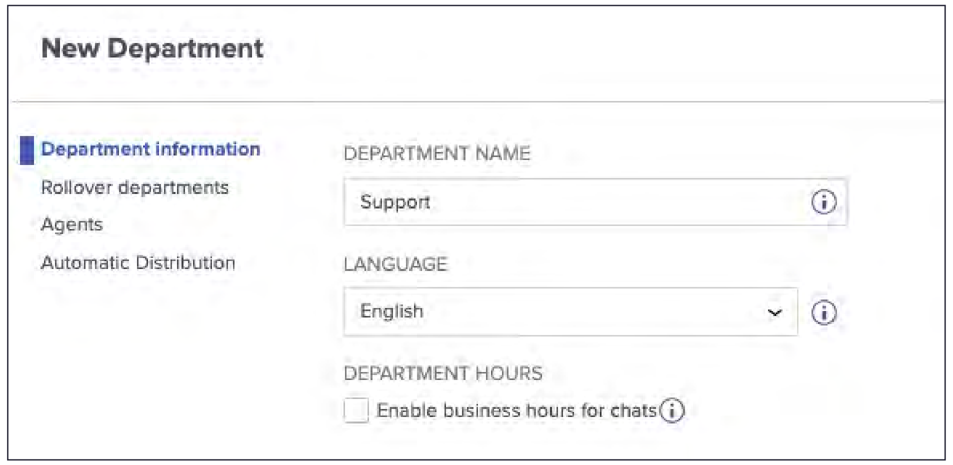
1. From admin.bold360.com, click **Organization** > **Departments.**

2. On the Department Management page, click **Create New.**



3. Enter a **Name.** If you have multiple departments and want customers to choose which department they want to be routed to, the department name can be seen by customers.

4. Under **Language,** select the language spoken by agents in this department.



5. Navigate to **Agents.** Click on individual agent names to add agents to their appropriate department. If you need to remove agents from the department, simply click on the agent name again to move them to lower section.

6. Click **Save.**

STEP 3 Define your Website

You'll need to set up a Website label in Bold360 in order to track the origin of visits and manage other aspects of the deployment. This website corresponds to the site where you will deploy the code for the chat button and window. Website labels also allow you to deploy the platform across multiple domains but still distinguish which site the visitor is on or is engaging from. Additionally, websites may be used for routing, assignment, and custom defined hours of operation; all of which will be specific to the website label you define and to the domain/website you deploy the code snippet.

To see the below steps in action, view our tutorial video [here](#).

1. From admin.bold360.com, go to **Organization** > **Websites.**

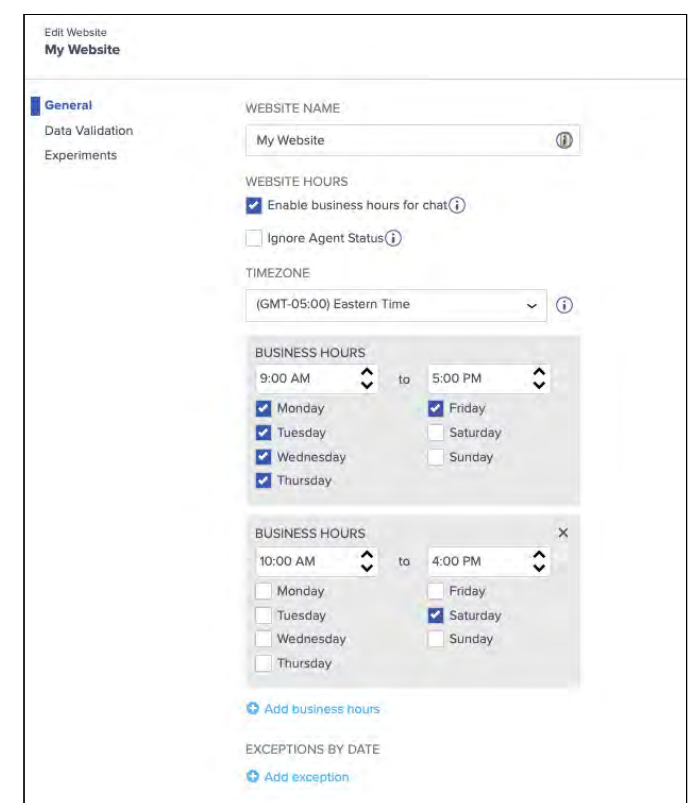
2. From the website management page, click on the existing website called **My Website.**

3. Unless your organization offers 24/7 coverage, you'll want to enable business hours to control the times, days, dates and circumstances under which your chat buttons are shown to customers. This will allow you to control the times, days, dates, and circumstances under which your chat buttons are shown to customers. To do so, check the box to **Enable business hours for chat.**

4. Select your **Timezone.**

5. Set your **Business Hours,** which are periods of time (day/time combinations) that reflect your regular hours of operation.
   a. Select the start and end of business hours, expressed as **From/To,** when chat is available for customers.
      - Outside of this time period, your chat buttons display as unavailable even when agents are available. For example, if business hours are set for 9:00 AM to 5:00 PM, the chat button associated with this website will become available at 9:00 AM (if agents are available) and will be disabled at 5:00 PM.

   b. Select the days to which the **From/To** setting is applied.



   c. To set unique hours for the weekend (or any day of the week), click **Add business hours** and set the days and time as described above.

   d. Under **Exceptions by date,** you can alter your Business Hours (opening hours) on specific dates.

6. Click **Save.**

STEP 4

Additional Configuration

(Automatic Distribution, Canned Messages, Wrap-up fields)

Step 4a: Automatic Distribution

Automatic Distribution automatically assigns chats to agents to maximize agent efficiency. Within Automatic Distribution settings, you can set concurrent chat limits, enable queues and more.

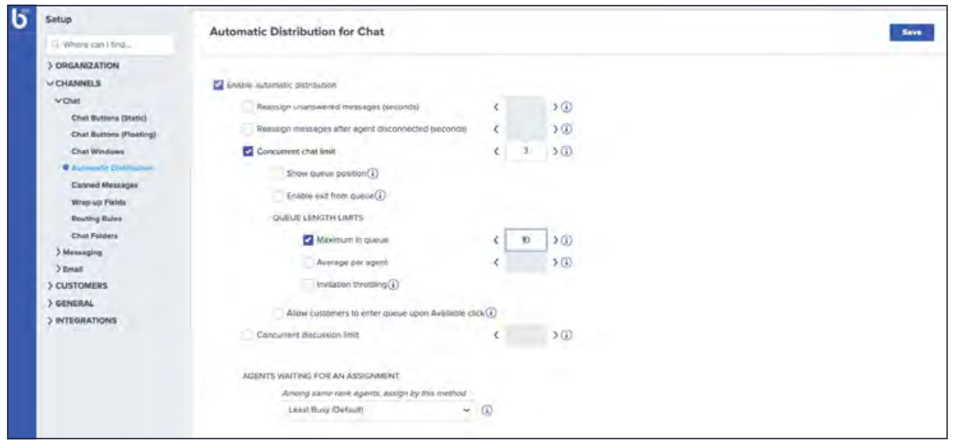
To see the below steps in action, view our tutorial video here.

1. From admin.bold360.com, navigate to **Channels** > **Chat** > **Automatic Distribution.** Set up automatic distribution for chat by checking box for **Enable automatic distribution.**

2. If wanted, you can enable a concurrent chat limit which will limit how many chats are assigned to an agent at a time. To do so, check the box for **Concurrent Chat Limit** and set this number in the corresponding box.

3. If you've set a concurrent chat limit, you can route customers to a queue when all agents have hit their concurrent chat limit. Under **Queue Length Limits,** you can set a hard limit under **Maximum in queue** or you can set a dynamic limit depending on how many agents are online under **Average per agent.** If you do not want to enable a queue, you can set **Maximum in queue** to 0.

4. You can change the assignment method under **Agents Waiting for Assignment.** By default, this is set to **Least Busy.** This is the approach most commonly taken by customers but you have three options outlined below.
   - **Least Busy** - Assign the next incoming chat to the agent who has the fewest active chats and has waited the longest. Choose this to balance the chat workload between agents.
   - **Most Busy** - Assign chats to your busiest agents. The next incoming chat is assigned to the agent who is handling the most chats until their limit is reached, and thereafter to the agent who has been idle for the shortest period of time. Choose this option if your agents must manage non-chat tasks along with their chat related work. Those who are chatting will stay busy chatting, while others can stay focused on non-chat tasks. To prevent overload on a single agent, make sure concurrent chat limits are set.
   - **Round Robin** - Rotate chat assignment among all available agents regardless of waiting time or number of active chats (until their concurrent limit is reached). Choose this option to balance the number of chats assigned per agent. Lower ranked agents will only be assigned a chat if all higher ranked agents have reached their limit.



5. Click **Save.**

STEP 4

Additional Configuration

(Automatic Distribution, Canned Messages, Wrap-up fields)

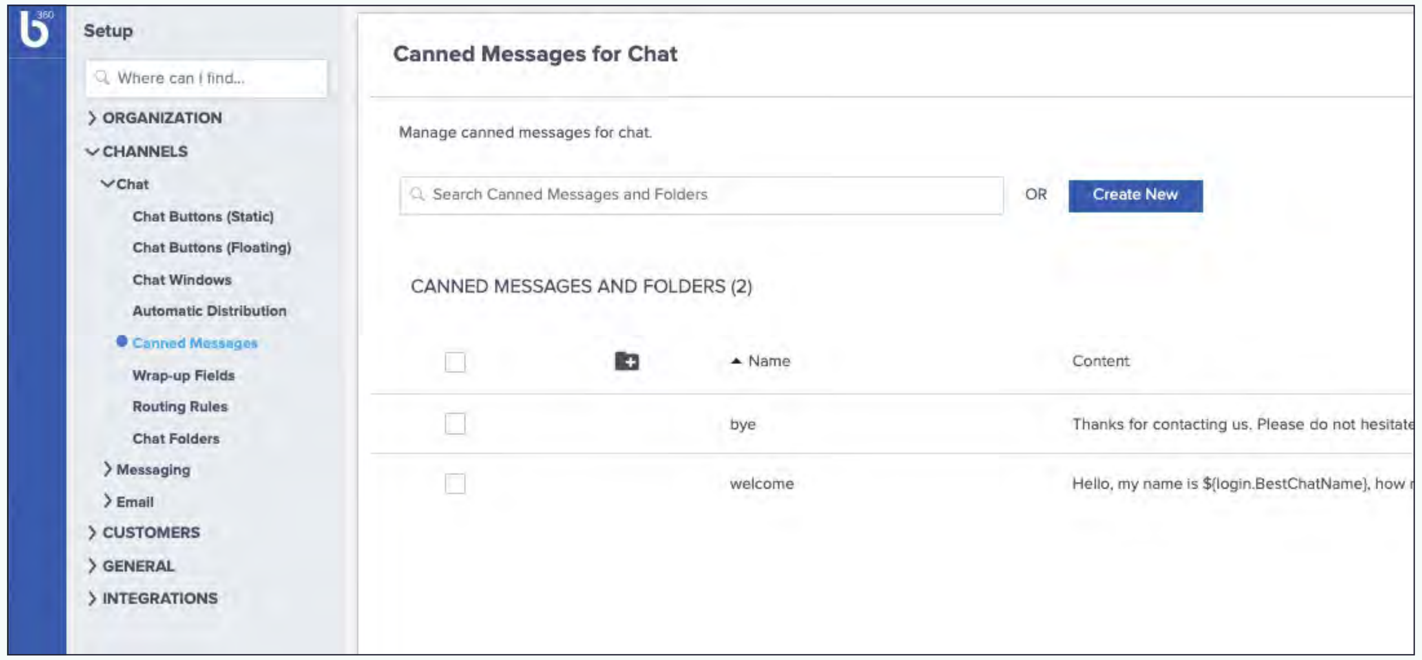
Step 4b: Canned Messages

Canned messages are predefined strings of text that an agent can insert into a conversation. With canned messages, the agent can reuse commonly used responses without having to type them.

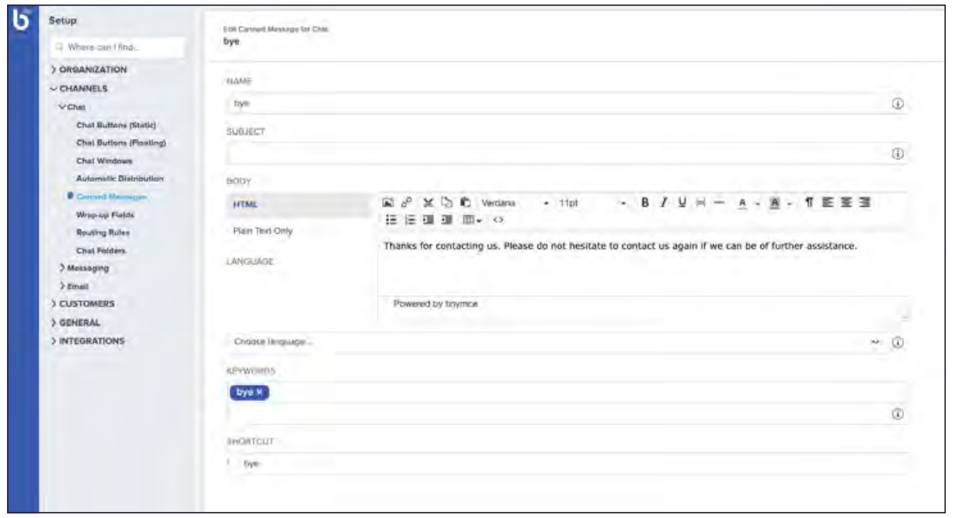
To see the below steps in action, view our tutorial video here.

1. From [admin.bold360.com,](admin.bold360.com) navigate to **Channels** > **Chat** > **Canned Messages**

2. Out of the box, you'll have two canned messages: **welcome** and **bye.** Feel free to customize either of these by clicking into them and updating the body.



3. To create a new message, click **Create New.**
   a. Add a **Name** so that agents can easily identify and reference the message.
   b. Document your message within **Body.** You can include dynamic HTML variables such as agent or customer name. You can find a list of HTML variables here.
   c. Include any words and/or phrases that help identify this message as relevant to a conversation within **Keywords.**
   d. Agents can more easily use canned messages by adding a **Shortcut.** This enables agents to use a canned message without having to search for it by typing '/[shortcutname].'



4. Click **Save.**

STEP 4

Additional Configuration

(Automatic Distribution, Canned Messages, Wrap-up fields)

Step 4c: Wrap Up Fields

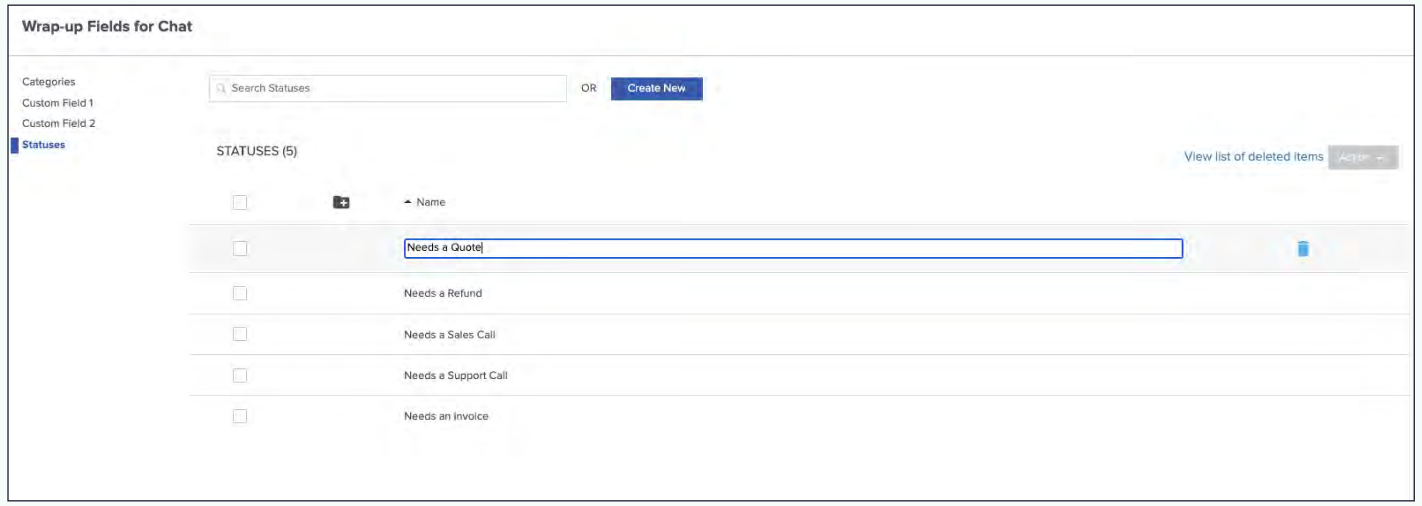
When a chat ends, an agent will be prompted to provide "wrap-up" information about the chat. This will label the chat session for reporting purposes. You can create labels (wrap-up fields) that can be used to categorize and organize chats. These can be particularly helpful to leverage if you decide to integrate with a CRM tool in the future.

To see the below steps in action, view our tutorial video [here](#).

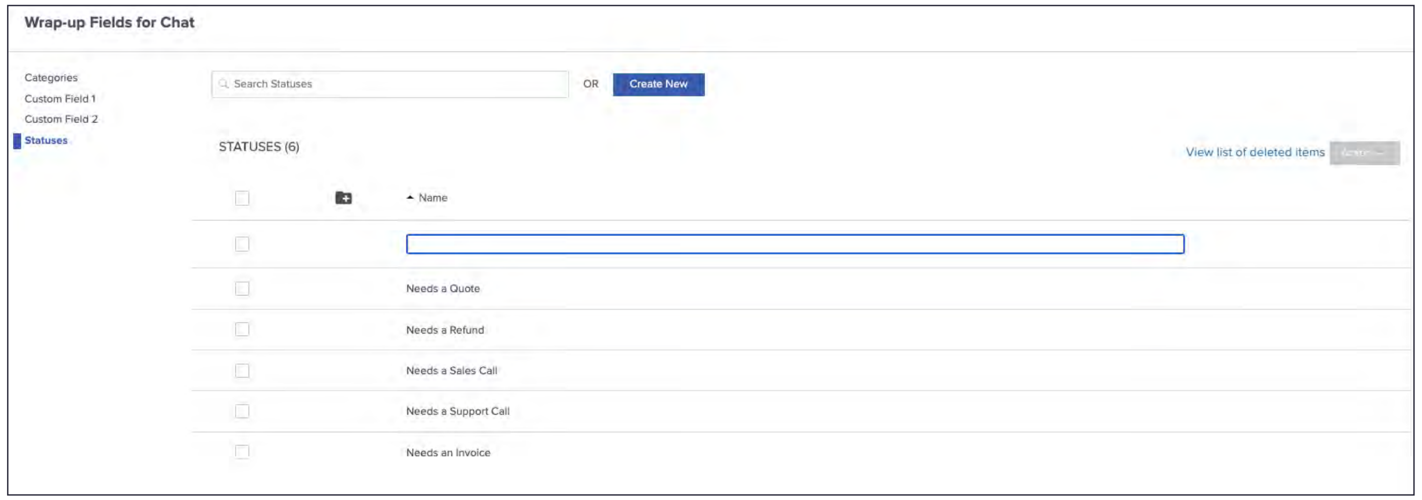
1. From [admin.bold360.com](#), navigate to **Channels** > **Chat** > **Wrap-up Fields**

2. Along the left side of the page, choose the type of label to edit or create: categories and/or statuses.

3. To edit an existing out-of-the-box item, click on the item's name. From here you can rename the item or delete the item by clicking on the trashcan icon.



4. Click **Create New** to add additional categories or statuses. Upon doing so, name the category or status within the new blue box.



5. Click **Save.**

STEP 5 Chat Window

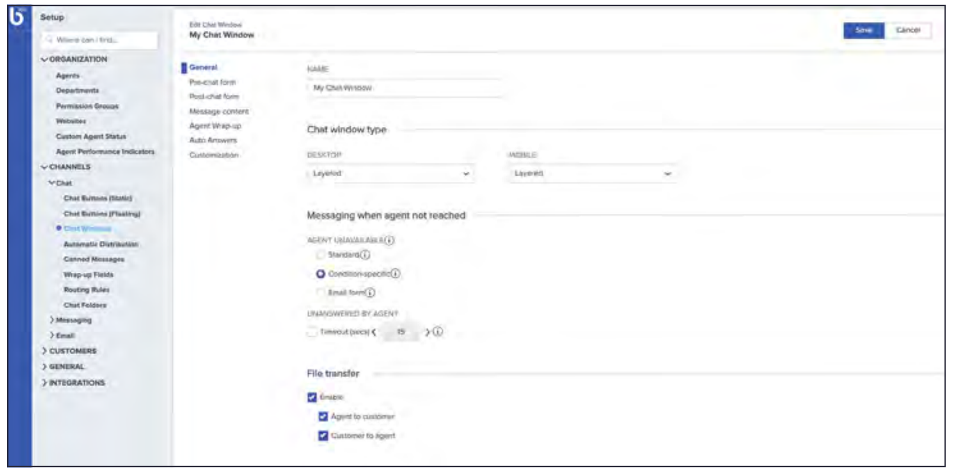
The chat window is where you'll configure the customer's chat experience. A chat window controls the look and feel and advanced behavior of the interface that is opened when a customer clicks an associated button.

To see the below steps in action, view our tutorial video here.

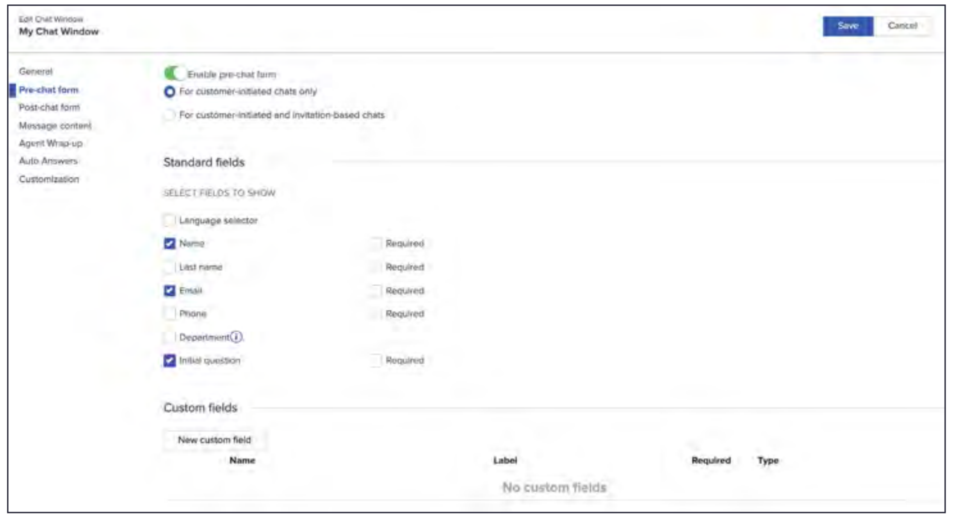
1. From admin.bold360.com, navigate to **Channels** > **Chat** > **Chat Window.**

2. Click on **My Chat Window.**

3. Within the **General** tab:
   a. Ensure **Layered** is selected for both **Desktop** and **Mobile.** We recommend using a layered window as opposed to a pop-up window in order to provide a modern, optimal user experience.
   b. For **Messaging when agent not reached,** select **Condition-specific.** This will provide customers with more specific messaging (such as out of business hours or full queue) when agents are unavailable.
   c. If agents or customers should have the ability to send files, check **Enable** under **File transfer.** You can choose whether this is enabled from agent to customer, customer to agent or both.

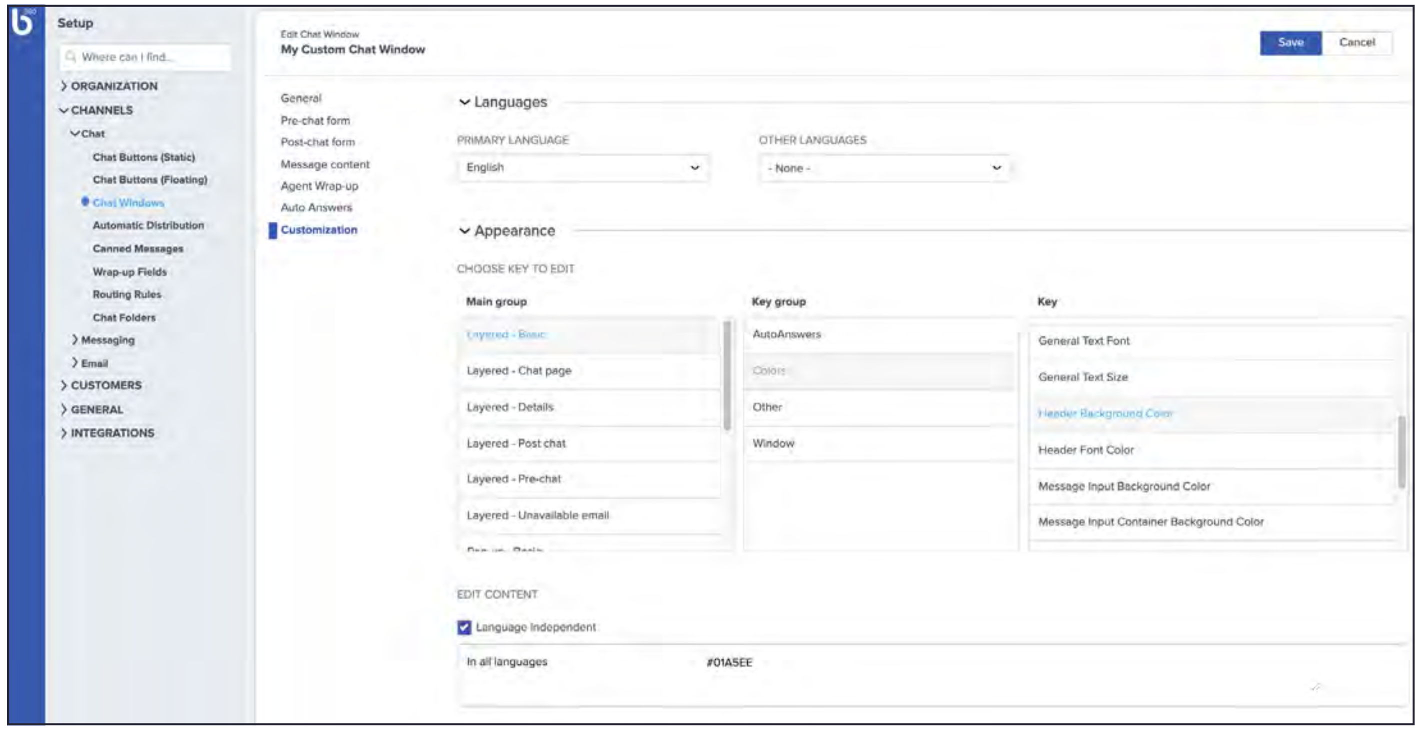


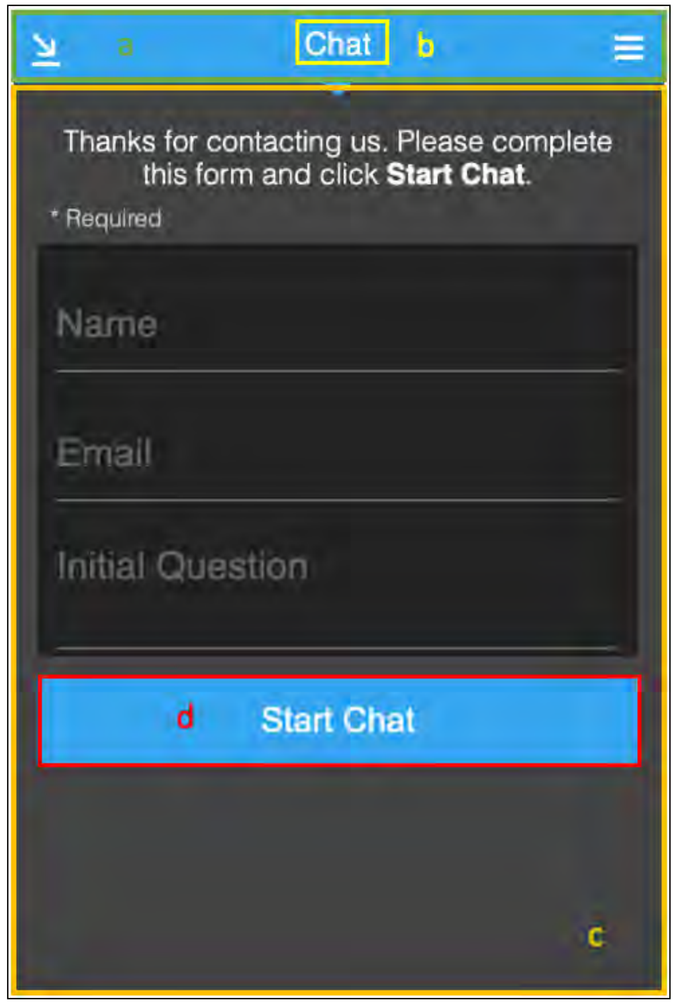
4. If wanted, you can enable a pre-chat form, which will prompt customer for information before they are connected with an agent. To do so, navigate to the **Pre-chat form tab.**
   a. **Enable pre-chat form.** You can select **For customer-initiated chats only.**
   b. Choose the fields you want to include under **Standard fields.** We recommend using **Name, Email** and **Initial Question.** To start, we recommend not making them **Required** as they may deter customers from chatting.



5. Within **Post-chat** form tab:
   a. You can choose to allow customers to send themselves a transcript. If so, enter the email address you want it to send from and choose whether it should be sent in Plain Text or HTML format.
   b. You can enable a Post-Chat form, which will prompt a customer for feedback after their chat conversation ends. To do so, under **Customer survey,** choose option to **Show when chat ends.**
      - We recommend choosing **If customer sends more than 2-3 messages**
      - We recommend choosing **Overall** and **Comments** to start to keep it simple and encourage customers to fill out the survey. (Adding too many fields will deter customer from providing feedback). Using these two fields will allow customers to provide a numeric score and open-ended feedback.

6. You can customize the user interface of the chat window within the **Customization** tab. You can find a full list of customizable attributes here. Below you'll find the four most important configuration items to change and where to do so:
   a. **Layered - Basic** > **Colors** > **Header Background Color**
   b. **Layered - Basic** > **Window** > **Window Title**
   c. **Layered - Basic** > **Colors** > **Content Background Color (R, G, B)**
   d. **Layered - Basic** > **Colors** > **Button Background Color**





STEP 6 Floating Chat Button

To see the below steps in action, view our tutorial video [here](#).

1. Navigate to **Channels** > **Chat** > **Chat Buttons (Floating).** Click on **My Chat Button.**

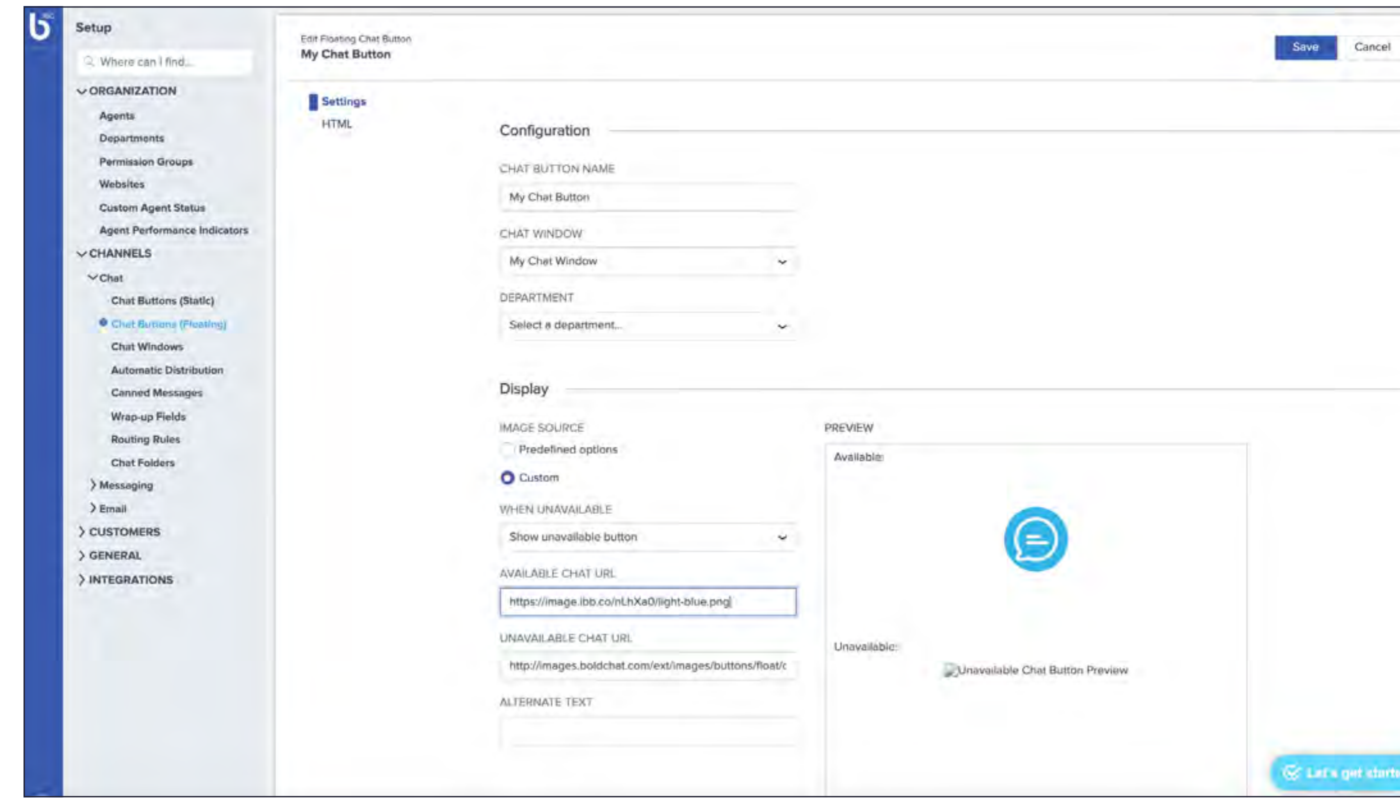
2. Under **Chat Window,** select **My Chat Window** that you built in step 5.

3. If you have one department, select that department under **Department.** This will route any chats that come in through this button to agents within that department.

   Note: *If you have multiple departments, you can find more information on your routing options in the next section "Tips and Tricks: Routing."*

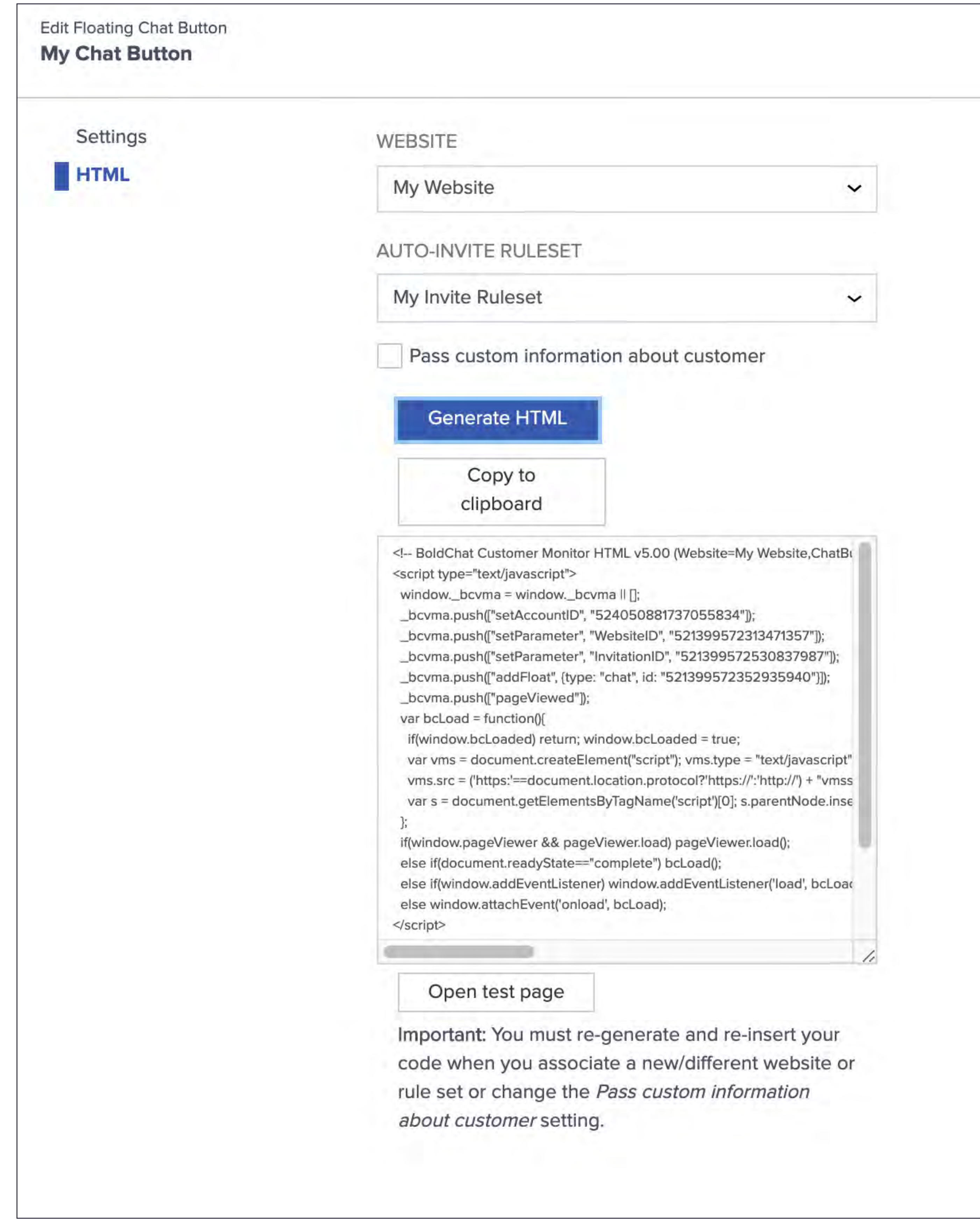
4. We recommend using your own custom image for the button itself. To do so, select **Custom** for **Image Source.** This custom image should be hosted on a URL, so that you can point to the button within **Available Chat URL.**

5. We also recommend using another own custom image for an unavailable button. To move forward with this recommended approach, select **Show Unavailable** button under **When Unavailable.** This custom image should also be hosted on a URL, so that you can point to the **Unavailable** button within **Unavailable Chat URL.**



6. Once you've completed all the steps we've outlined, you're ready to generate the HTML to place on your website. To do so, navigate to **HTML.**
   a. Select **My Website** under **Website.**
   b. Select **My Invite Ruleset** under **Auto-Invite Ruleset.**
   c. Click **Generate HTML.**
      • If you see the **Save before proceeding** pop-up, click **OK** in order to proceed
   d. Once HTML is generated, click **Copy to clipboard.**
   e. Paste this code into your favorite Text Editor such as notepad. We do not recommend pasting code into Microsoft Word as it can break the code with styling or line breaks. Our best practice recommendation is to deploy this code to a staging site first. From there, review the widget and make any changes you want. Upon doing so, regenerate the code and then send it to your web developer to be added to all pages on your live website! Note that any test data will appear in reporting.

Note: *if you don't have a custom button image, you can use our default image by keeping Image Source set to Predefined options.*



Tips & Tricks | Routing

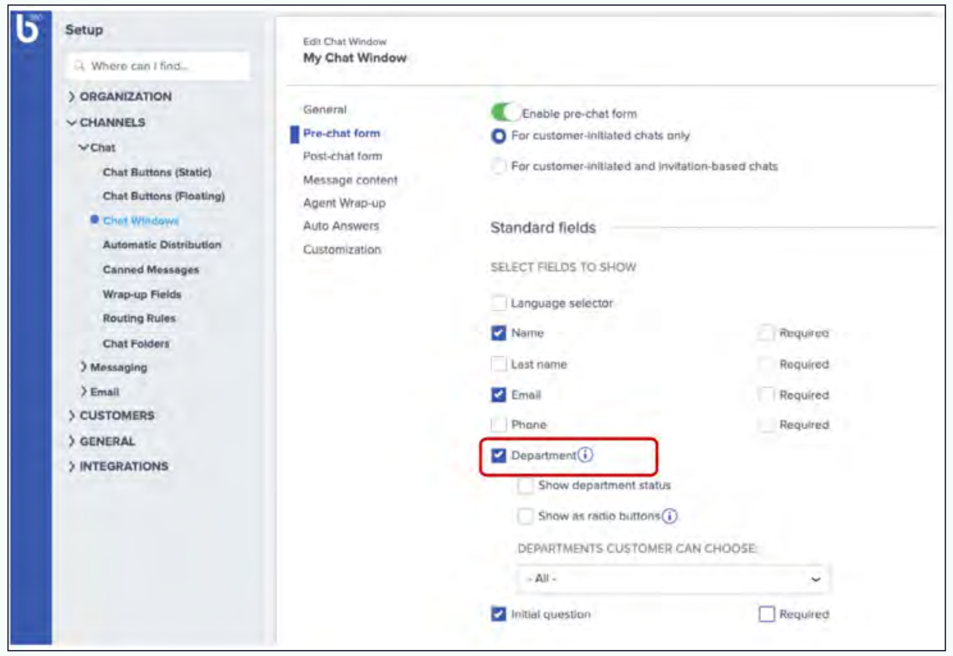
If you have multiple departments, you'll likely want to have some logic in place to route customer chats to the appropriate department. This can be done in a few different ways, and in this section, we'll walk through the two most common approaches to routing.

Via Pre-Chat Form - For cases when you want the customer to choose with which department they want to be connected

1. Make sure your departments are named in a customer-facing manner.

2. **Navigate to Channels** > **Chat** > **Chat Window.** Click on **My Chat Window** and navigate to the **Pre-Chat form tab.**

3. Check box for **Department.** This will add Department as a field in the pre-chat form. Customers can choose the department they want to speak with and will be routed accordingly.

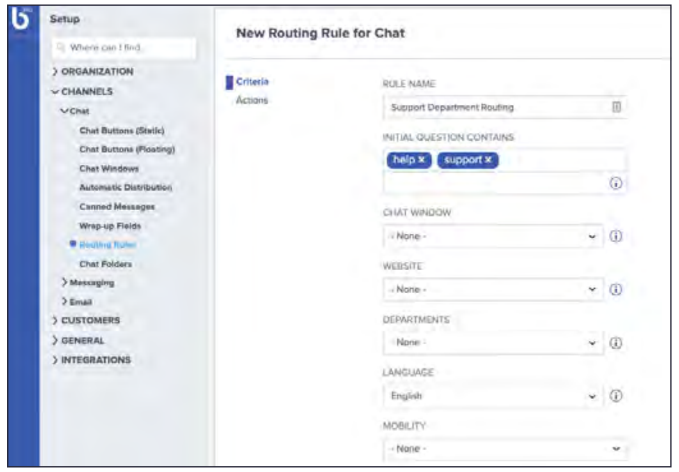


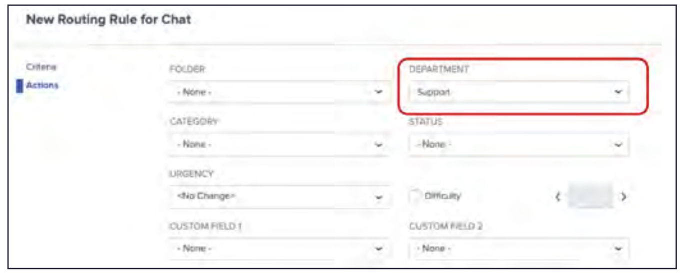
Via Routing Rules - For cases when you want to route customers to a particular department based on their initial question, language or other criteria.

1. **Navigate to Channels** > **Chat** > **Routing Rules.** Click **Create New.**

2. Within **Criteria** tab:
   a. Create a **Rule Name.** This name should include the department name.
   b. Fill out the criteria that will determine when a chat should be routed to this department. For example, if **Initial Question Contains 'help'** or **'support'.**

3. Within **Actions** tab, select appropriate department from **Department** drop-down.





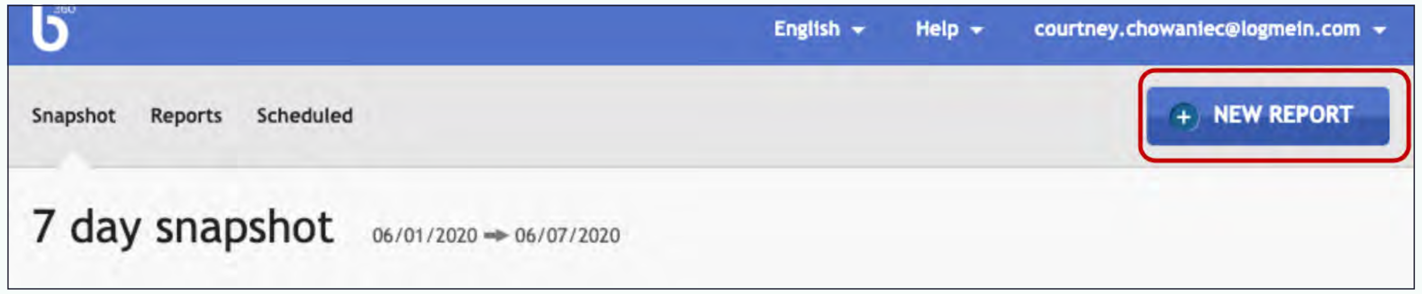
Reporting

Bold360 offers reporting to help organizations analyze and interpret the underlying data associated with site engagements and facilitate the transformation of data into actionable information. Bold360 reports are available at the Bold360 reporting site. Using Bold360 reports does not require any special license. To get started, reference the guide below for how to create a Chat Summary Report and how to run, filter, group and export data. Additionally, we have outlined some additional reports that may be a helpful introduction to Bold360 reporting.

Chat Summary Report

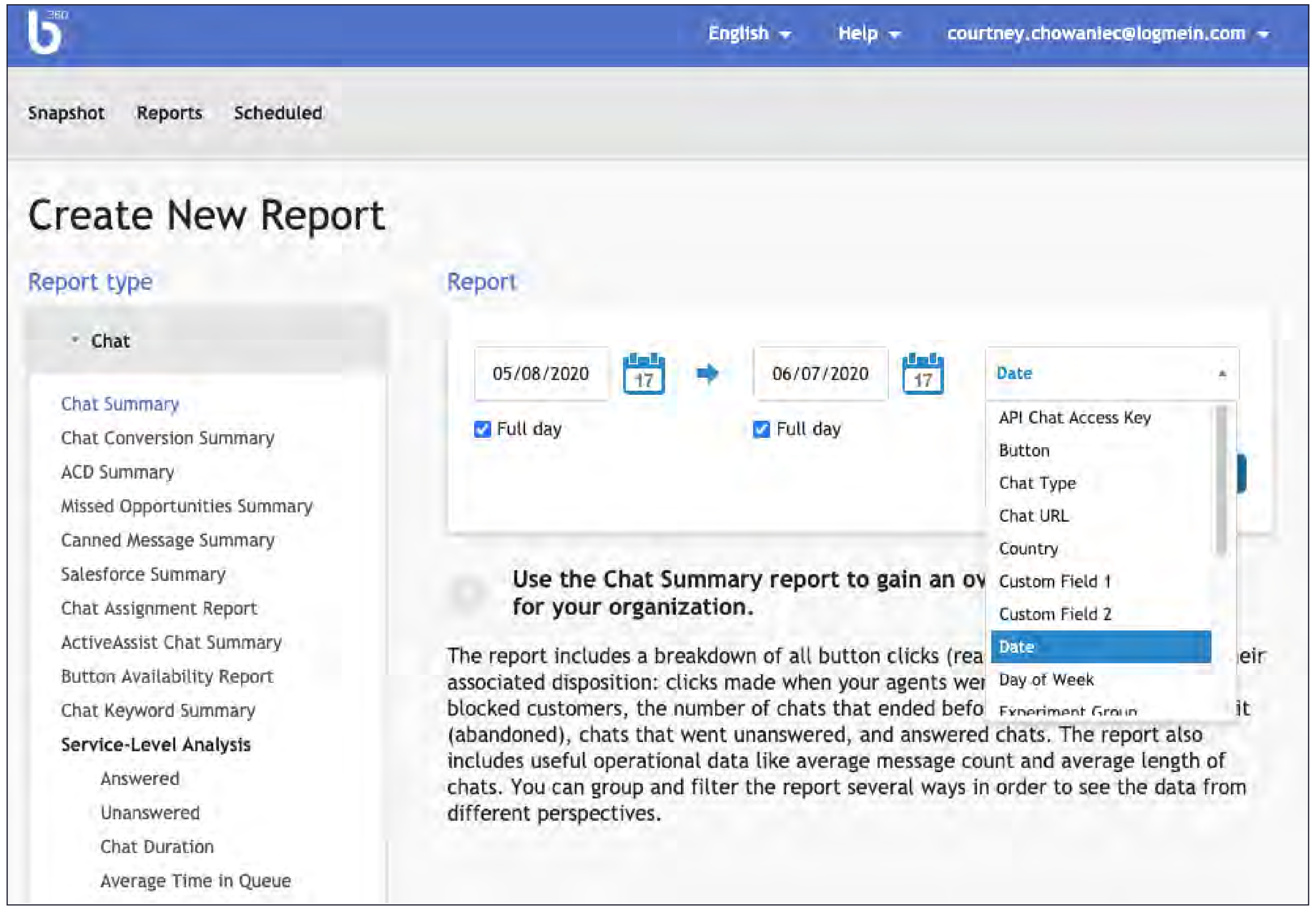
The Chat Summary Report is the most popular and most frequently used report across our customer base. This report will provide you with insights into your chat volume, a breakdown of those chats (unavailable, blocked, abandoned, unanswered, answered) and some basic data around wait times, chat times and speed to answer. You can also increase the granularity of the chat summary report by grouping by category, status or chat URL.

1. To run the chat summary report, navigate to **New Report** in the upper right corner.



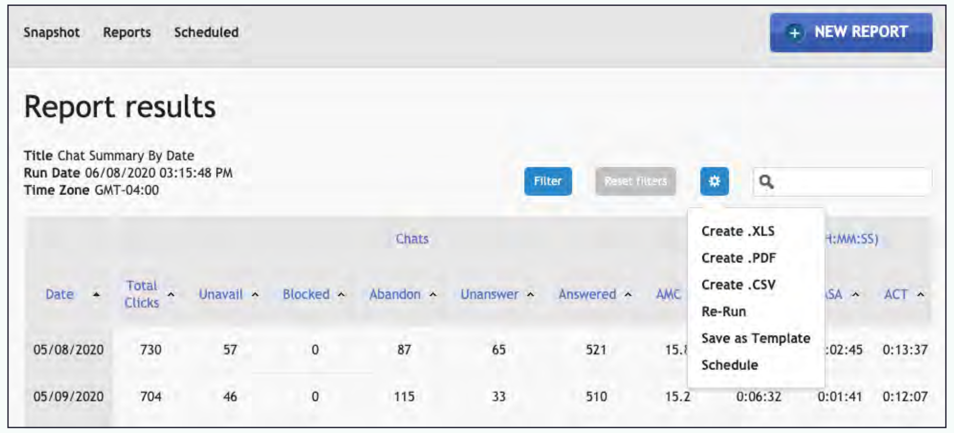
2. Click **Chat Summary** from the list of reports on the left side of the screen. Select the date range you're looking for.

3. Within the drop-down, select how you want to group your report. By default, the report is grouped by **Date** but you can change to group by **Button, Window, Operator** and more.

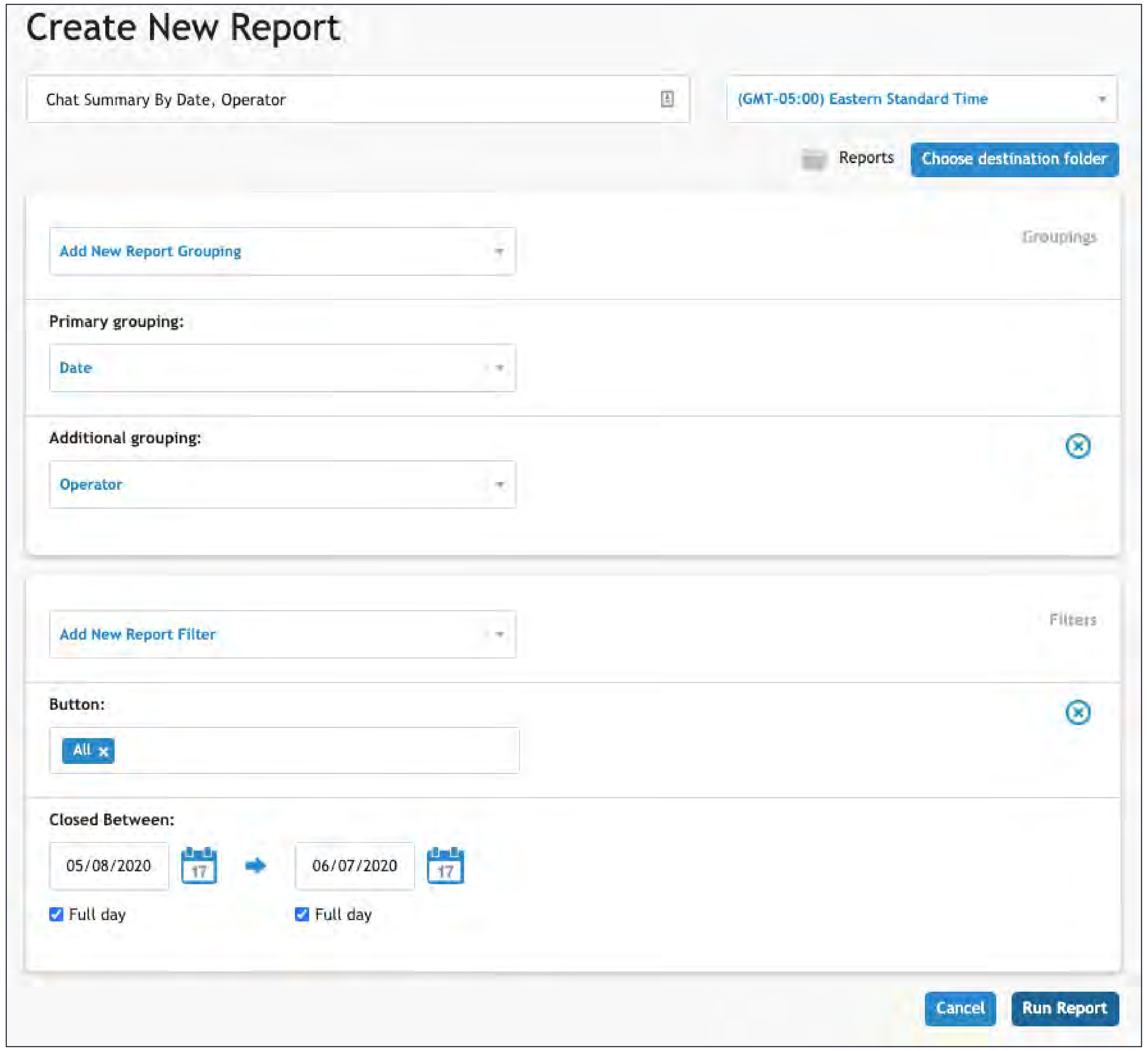


4. Once your report runs, you can see the category or column definitions at the bottom of the screen under **Result** category definitions (also included below):
   - Total Clicks = all clicks of the chat button plus all accepted invitations
   - Unavailable = all clicks of chat button when no operators are logged in as available
   - Blocked = all clicks of chat button by blocked customers
   - Abandoned = customers presented, but not completing the pre-chat survey
   - Unanswered Chats = abandons while waiting for an answer plus chats reaching timeout
   - Answered Chats = all chats answered by an operator
   - AMC = Average Message Count for answered chats
   - Unanswered Time = time in queue for unanswered chats
   - ASA = Average Speed to Answer for Answered Chats. Time from when the chat Started to the time it was Answered by the agent
   - ACT = Average Chat Time for answered chats. Time from answering a chat until it closes, specifically, all the time between the first operator answering the chat and the final operator assigned to the chat when it closes, adds up to the ACT calculation for the final operator.

5. Click on the gear icon in upper right corner to export the report. Reports can be exported to .CSV, .XLS or .PDF.



6. To change or add filters or groupings of the report, click on **Re-Run.** Upon updating or adding groupings or filters, click **Run Report.**



ACD Summary (Automatic Chat Distribution Summary)

*The ACD Summary includes total chats assigned automatically to agents (offered), the number of chats that ended before the agent could answer it (abandoned), and the number of chats taken away from an agent and given to another because the customer's wait time exceeded your threshold (reassigned), chats that went unanswered and answered. The report also includes useful operational data like average message count, the average duration of chats, and the maximum number of customers waiting in queue and the maximum wait time for any chat. We recommend grouping this report by operator to see if agents are answering or missing chats when they are assigned. You can find more information **here.***

Missed Opportunities Summary

*The Missed Opportunities report shows administrators why chats are missed and can provide insight into how to increase their engagements. For example, this report can show instances of when customers were unable to chat based on business hours or a full queue. You can find more information **here.***

Productivity Report (under Operator Reports)

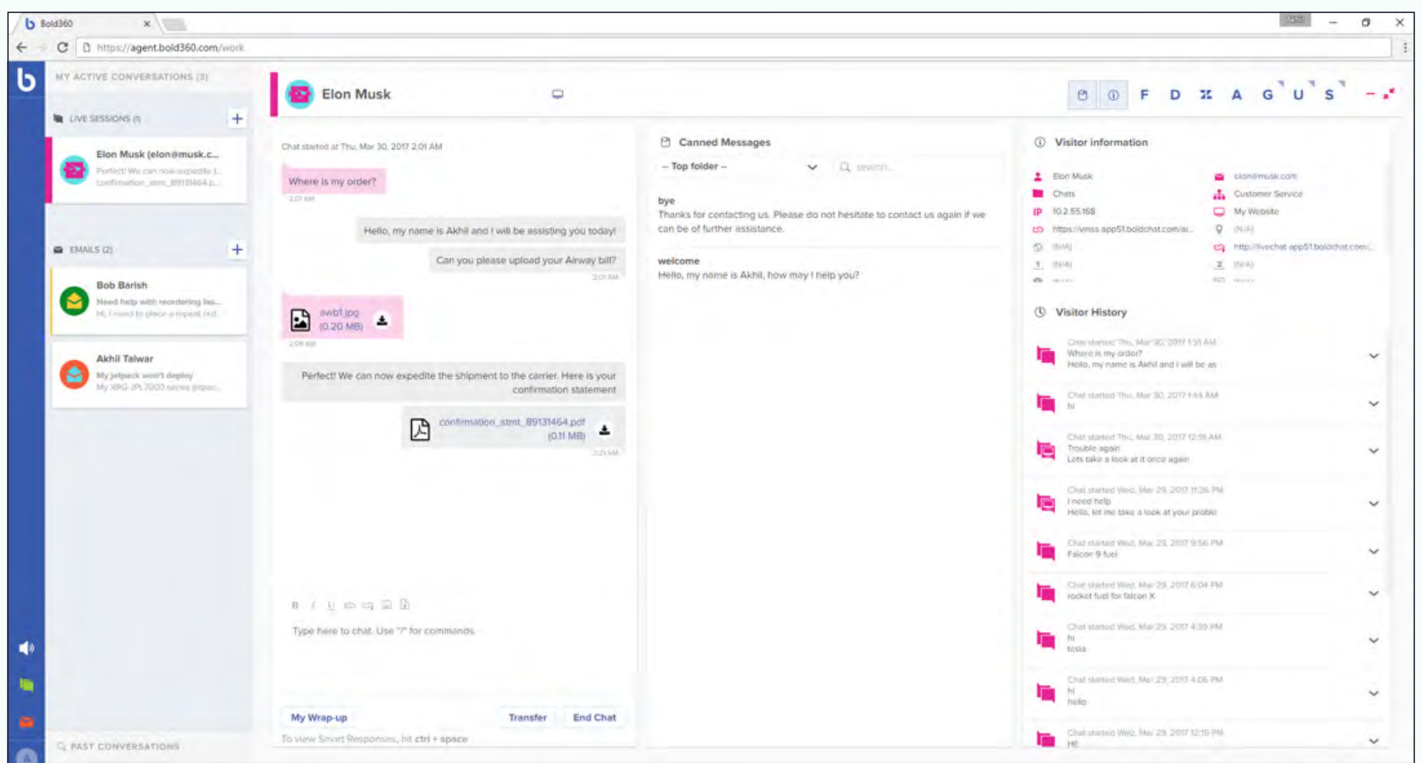
*The Productivity Report is set to group by operator. This report allows administrators to see a breakdown of agent behavior while available or away. The report provides additional statistics around average response time (ART) and chat concurrency. You can find more information **here.***

Custom Survey (under Operator Reports)

*Provides an agent by agent view of performance on the default post-chat and custom pre/post-chat survey fields. For completed surveys, the raw scores for each custom field are presented and open-ended comments are also included. You can find more information **here.***

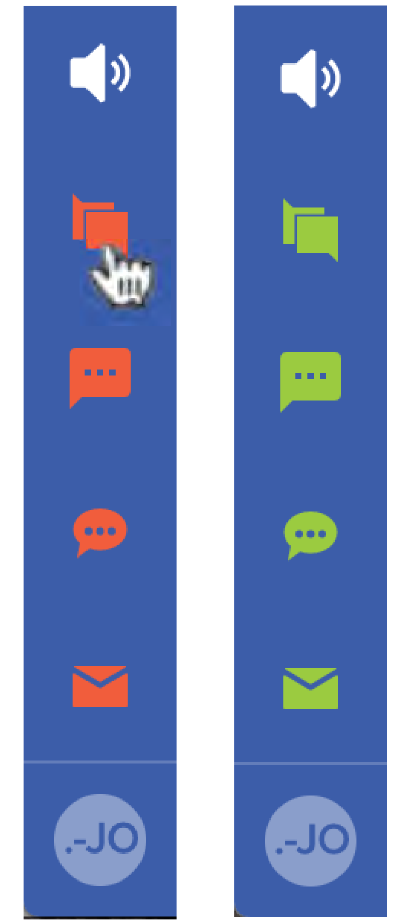
Agent Workspace

Bold360's Web Workspace is intentionally designed for maximum speed and efficiency. The interface is optimized for agents to more easily multi-task across all interactions with a simple, transparent view of multiple customer engagements. It's also easy to use and fast with shortcuts designed to keep the agents' hands on the keyboard – resolving customers' needs quickly. Utilize the Web Workspace today to increase agent efficiency, serve more customers, and improve results. It's never been easier to engage your customers across channels and devices efficiently and effectively.



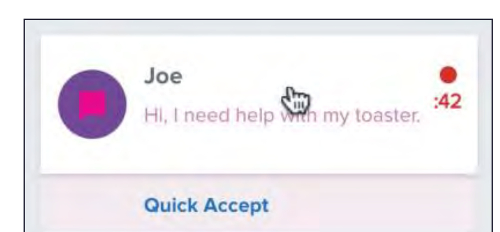
1. Get started by logging in at: agent.bold360.com

2. Learn the basics by reading the instructions below



Available

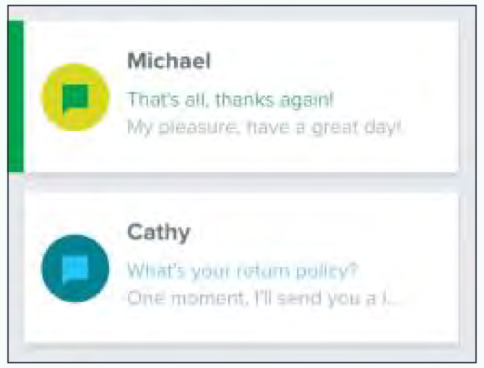
Available Ready for action? Switch betweem Away and Available in the lower-lefthand corner by clicking on the applicable channels (chat, SMS, FB Messager, email). Green means Available, red means Away.



Grab a chat without working on it right away.

Click Quick Accept to accept without working on it right away. Or click anywhere else to accept and move to your workspace.

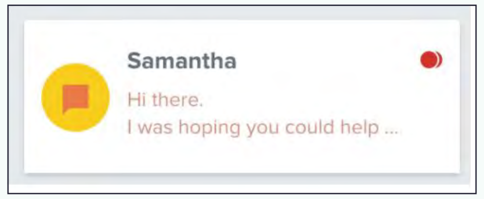
Tip: When the timer runs out, the chat is reassigned.



Switch between channels

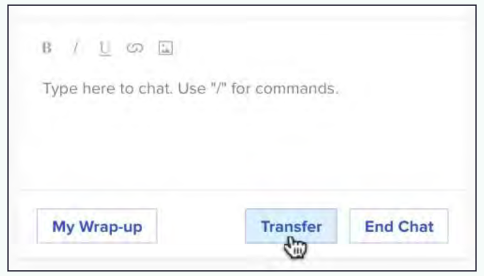
Click any chat, message or email to open it in your workspace. The active item is highlighted along its left edge.

Tip: The top item on the list may be the most urgent (newest chat/message, oldest email)



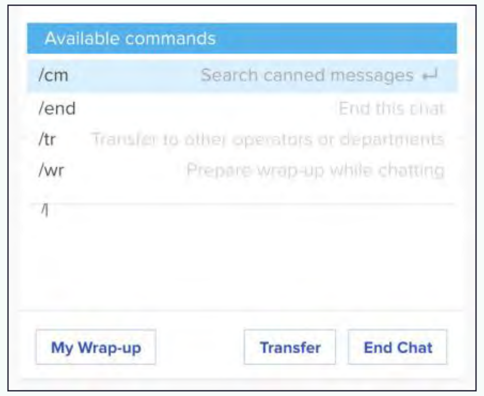
Red spot?

The red spot tells you the customer is waiting for your reply. Notice we show you the first few lines of the customer's message.



Transfer a chat

To transfer a chat to another team member, click the Transfer button at the bottom of the chat panel and select an available department or operator from the list.



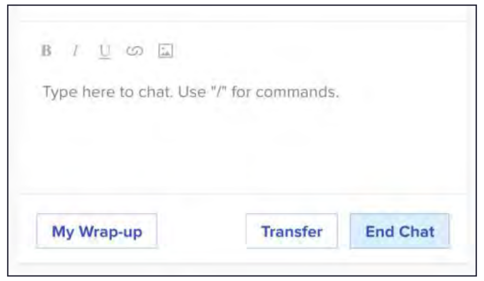
Chat commands

In the chat panel, type a slash ("/") to see the list of commands. Your administrator can also set up /slash commands for canned messages.

My Wrap-up

Prepare your wrap-up without ending the chat

When the customer needs you, click Back to chat



End a chat

To end a chat, click the End Chat button at the bottom of the chat panel.

Tip: You can also use the /end chat command

FAQs & Troubleshooting Tips

Admin Questions:

How do I contact support?

*If you have a question or encounter an issue, you can try to self-serve via **Bold360 University** or via our **Support Center.** If you are not able to solve the problem yourself and need further assistance, you can contact support as outlined **here.***

Chat button isn't showing on website or Chat button shows that chat is unavailable.

Make sure someone is signed into the Agent console and set to available.

My Chats are not automatically assigning to agents (Routing/ACD/Queues/rule exports)

Make sure ACD is enabled either at the Channel level or at the Department level. If enabled, check any routing rules that assign chats to the desired department.

Why are my customers building an endless chat queue?

Make sure you enable a concurrent chat limit within ACD, and then you can set your queue limits.

How can I see what Routing Rule is causing my chats to go to a different location?

Export your Routing Rules into an excel file and enable filtering in Excel. You can now filter by the specific actions or criteria that cause the chats to be routed, and see which rule has a higher rank, meaning the system will trigger that rule first.

If someone else made changes to something I was working on, or if I'm not sure what I changed, is there an easy way to find out what happened or revert back?

There is no way to revert to settings you previously saved unless you made a copy of the item. However, you can use the Audit Log to see exactly what changes have been made on the account. Simply locate the changed item in the Audit Log by the date and time the change may have occurred and you'll be able to see exactly what settings where changed, what were they changed to, and see whether something was created, updated, or deleted.

***Note:** make sure you are in a permission group that provides access to the audit log.*

My agents or I cannot access anything.

If you cannot see a chat folder, edit canned messages, or handle any other tasks in any Bold360 console, you may need to check you or your agent's Permission Group to see if you have access to the item.

How can I see what my agents are working on?

Navigate to agent.bold360.com/monitor to be able to see our Queue Monitor system where you'll get up to four queues depending on your subscription type: AI Chatbot chats, Queued chats, Assigned to an Agent chats, and Closed chats. You can click each item to see the conversation and information about the website visitor and information about the chat conversation. You can also filter by agent Departments as well as Folders to see just a specific queue/group of items or agents.

How do I understand my peaks, trends, and questions on Agent performance?

You can utilize our reporting in order to help you see a breakdown of your chat/visitor volume. We have many different reports that look at agent efficiencies, visits to your website and where chats are started or ended, and many more use cases depending on the KPI you are measuring for. You can find more about reporting within the reporting section of this guide or within our support center.

I have an issue that I believe is a bug. How should I escalate my issue to LogMeIn?

*In order to raise a support case or bug, please collect a few necessary items before contacting Support to make your experience as smooth as possible: a .HAR file captured while replicating the issue, full-screen screenshots and not just a screenshot of a particular error message, and the Chat ID of any chats which had an issue. You can find more information on how to contact support **here**.*

Your base reports or dashboard are good but don't present all the information our Organization requires.

You can create custom reports or a dashboard using our API. You can find our documentation on developer.boldchat.com which contains information on how to export your raw data to then create custom reports or a dashboard.

Are there any other best practices I need to be aware of?

To ensure you're set up for future success, create folders on a 1:1 ratio with your department names (ex. Sales department also has a chat folder titled Sales) so that your teams can view their work items and supervisors can report on only their team's work items. You'll also want to make sure your agents can efficiently handle as many chats that are assigned to them. The best way to help your agents is to create predefined messages, called Canned Messages, that agents can quickly use to keep the conversation going. Lastly, it is recommended to include brackets {} at the beginning of the Agent Name that contain either the person's role (Agent, Admin, Supervisor, etc.) or their permission group (Agent, Sales, Developer, etc.) so when looking at reporting you can tell exactly what part of the Organization the person belongs to.

Developer Questions:

I have deployed the code snippet, I have agents available, but the button still doesn't show on the website.

When deploying the code snippet, make certain that you paste it directly from the code generation dialog in the Bold360 Admin interface. If the code snippet was sent to you for deployment in a MS Word document, it's possible that the code was broken with MS Word styling or line breaks Word inserts. Request the code snippet again in a notepad document.

I might want to use Proactive Invites at some point; what do you recommend?

You will need to redeploy code if you choose to integrate an Invitation Ruleset. We recommend disabling the default Invite Ruleset in the Admin Center and deploying the Invitation Ruleset with your button code. If you decide to use chat invites, you can easily enable the Invitation Ruleset and add some rules for your use cases.

What is the best way to manage the code deployment?

If you have a Tag Manager, it is recommended you deploy your code using the tag management system. This will enable you to trigger the Bold360 code on specific pages from a tag manager, which will make it easier to manage over time. If you deploy to each page of your website, then there it will be much more difficult and time-consuming to deploy and manage the code.

I had customized a few items with my Chat Window or Button and now things are not working correctly on my site.

Take your standard code snippet created from the Admin Center and place on a blank page to try and reproduce. If your code works on the blank page but not your website, there are probably some CSS or other variables on your site causing an issue. Please note that our support team cannot troubleshoot issues stemming from your site's CSS.

I'm having issues with an API Trigger not working

We need to first understand if the Trigger itself is the issue. To do so, set up two triggers, one to a staging/test website and one to your production site. If the trigger works in one space, we can assume there is something with the webhook causing an issue.

Agent Questions:

I can't login.

Navigate to launch.bold360.com. Enter your username and then click 'Forgot password'. If this does not resolve the issue, please contact your Bold360 administrator.

Once I log in, nothing is being displayed in my Agent interface.

Data is displayed in the interface once a chat has been assigned to you. Make sure you are set to available, launch a chat from the page the button is deployed. Depending on the account configuration a chat should appear in your interface. Once you click on the chat and answer it data will be displayed in the interface.

If I look at the Monitor View, I can't see anyone else's chats.

Your admin may have prevented you from seeing this information, please contact your Bold360 Admin to ensure your permission group allows you access to any items you require.