

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**.



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- Via Pre-Chat Form: For cases when you want the customer to choose with which department they want to be connected Via Routing Rules: For cases when you want to route customers
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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.

Setup	Agent Management		
Q, Where can I find	Agent management		
ORGANIZATION Agents	Manage agents.		
Departments Permission Groups Websites	Q Search agents	OR Create New	
Custom Agent Status Agent Performance Indicators	Department: - None -	÷	
> CHANNELS			
CUSTOMERS	AGENTS (4)		
> INTEGRATIONS	▲ Name	lisername	Em

- 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



Q. Where cars L find	New Agent
 ⇒DRGANEZATION ■ Agenta Pagentinettis Pagentinettis<td>Agend hithormation Rychithmetis Lagin non Searchy Maximuc Dautoutors Agent Haars Email Serlings Activational Searchings Activational Activational Activational Activational Activational Activational Activational Activational Activational Ac</td>	Agend hithormation Rychithmetis Lagin non Searchy Maximuc Dautoutors Agent Haars Email Serlings Activational Searchings Activational Activational Activational Activational Activational Activational Activational Activational Activational Ac

- 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 <u>here</u>.

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



- 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.

Setup	Department Management	
Q. Where can I find	Department management	
ORGANIZATION Agents Departments	Manage the departments you use to group agents an	d distribute chats.
Permission Groups Websites	Q. Search departments	OR Create New
Custom Agent Status Agent Performance Indicators > CHANNELS	DEPARTMENTS (5)	
> CUSTOMERS > GENERAL	Department Name	# of Agents
> INTEGRATIONS	Sales	t
	Support	0

- 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.

Department information	DEPARTMENT NAME	
Rollover departments	Support	0
Automatic Distribution	LANGUAGE	
	English	i
	DEPARTMENT HOURS	
	Enable business hours for chats(j)	

section.

New Department		
Department information Rollover departments	SELECTED AGENTS (2) Circli im agent to terrow	
Agents	-Agent name	
Automatic Distribution	John Don	
	Katherine	
	LAPLITE IN	
	Click wy equation acts	
	Search (gent)	
	Agent name	
	Gountrary	

6.	Clic	k S	ave.

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

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let line	~		
gent chet name			

Define your STEP 3 **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.
- - when chat is available for customers.
 - will be disabled at 5:00 PM.



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,

• 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

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.



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.

- concurrent chat limits are set.





• 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

• 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.

	Save
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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, 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.

Setup	Canned Messa	ges for Chat			
Q. Where can (find		geo lor ondi			
> ORGANIZATION	Manage canned mes	ssages for chat.			
∽Chat	Q. Search Canned	Messages and Fold	lers	OR	Create New
Chat Buttons (Floating) Chat Windows Automatic Distribution	CANNED MESS	AGES AND FOLI	DERS (2)		
Canned Messages Wrap-up Fields		80	▲ Name		Content
Routing Rules Chat Folders			bye		Thanks for contacting us, Please do not hesita
> Messaging > Email			welcome		Hello, my name is \$(login.BestChatName), how
> GENERAL > INTEGRATIONS					

- 3. To create a new message, click **Create New**.
 - message.
 - variables here.
 - relevant to a conversation within Keywords.
 - search for it by typing '/[shortcutname].'



4. Click Save.

a. Add a Name so that agents can easily identify and reference the

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

c. Include any words and/or phrases that help identify this message as

d. Agents can more easily use canned messages by adding a Shortcut. This enables agents to use a canned message without having to



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.

Wrap-up Fields for	Chat		
Categories Custom Field 1	Q Search Statuses	OR Create New	
Custom Field 2	STATUSES (5)		View list of deleted items
		▲ Name	
		Needs a Quote	
		Needs a Refund	
1		Needs a Sales Call	
1		Needs a Support Call	
		Needs an invoice	

Wrap-up Fields for	Chat		
Categories Custom Field 1	Q. Search Statuses	OR Create New	
Custom Field 2 Statuses	STATUSES (6)		View list of deleted items
		- Name	
		Needs a Quote	
		Needs a Refund	
		Needs a Sales Call	
		Needs a Support Call	
		Needs an Invoice	

5. Click Save.

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

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.

Setup	Edt Chat Window			
G Wiles kan / tridu	My Chat Window			
Organization Agers Department Agers Department Monass Department Monass Department Monass Count operation Count operatioperation Count operation Coun	Ing Chair Waldow Concest Para-cust form Para-cust form Para-cust form Massage contex Agent Wath-up Auto Answerts Customaudion	HARE My Christophilipe Elserich Lyneat Messaging when egent no nepri optionaties() Stantard()	~ R teached	MORE Lines
Whep-up Fields Routing Bules Chait Foldoro) Mensaging) Clustonkere) GENERKE) GENERKE.) INTEGRATIONS		Concentron-speechic() Innal form() Unangewrited ar AGEV? Temeout pecol (15 File transfor File transfor Concent	¥@	
		Customer to Agent		

- navigate to the Pre-chat form tab.
 - only.
 - from chatting.

Edit Onit Window My Chat Window			
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Pre-chat form	O For customer-initiated chats o	ntyl	
Post-chat form	Exceptionar initiated and init	tellon harad chate	
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Agenit White-up			
Auto Answers	Standard fields		
Customization	SELECT FIELDS TO SHOW		
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	Norme	Required	
	Litist name	Required	
	Email	Required	
	Phone	Required	
	Deperiment()		
	Initial question	Required	
	Custom fields		
	New custom field		
	Name		Label
			No cus



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,

a. Enable pre-chat form. You can select For customer-initiated chats

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



- 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.

Eat Chat Window My Chat Window		Save Cancel
General Pre-chat form Post-chat form Message content Agent Wap-up Auto Answers Customization	Send transcript to customer Callow customers to send themselves a transcript SEND FROM THIS ADDRESS FORMAT FORMAT FORMAT FORMAT FORMAT FORMAT FORMAT FORMAT FORMAT FORMAT FORMAT F	
	Customer survey	

- 6. You can customize the user interface of the chat window within the Customization tab. You can find a full list of customizable attributes <u>here</u>. 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





			Save Cancel
	OTHER LANGUAGES		
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т			
	Key group	Key	
	AutoAnswers	General Text Font	
	Colors	General Text Size	
	Other	Hender Background Com	
	Window	Header Font Color	
		Message Input Background Color	
e email		Message Input Container Backgrour	nd Color
ndent.			
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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.



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dow	~														
partment	~														
CE.		PREVIEW													
d options		Available													
ULABLE								8							
ilable button	~						E								
HAT URL							-	4							
s.ibb.co/nLhXa0/light-blue.png	-														
CHAT URL		Unavailable:													
s.boldchat.com/ext/images/buttons/flo	at/c		13	R	Unav	alable	Chat	Button	Previe	W					
EXT															
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												100			

- 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.

Settings	
HTML	

EBSITE

My Website

JTO-INVITE RULESET

My Invite Ruleset

Pass custom information about customer

Generate HTML

Copy to clipboard

<!-- BoldChat Customer Monitor HTML v5.00 (Website=My Website,ChatBi <script type="text/javascript">

V

window._bcvma = window._bcvma || [];

_bcvma.push(["setAccountID", "524050881737055834"]);

_bcvma.push(["setParameter", "WebsiteID", "521399572313471357"]);

_bcvma.push(["setParameter", "InvitationID", "521399572530837987"]);

_bcvma.push(["addFloat", (type: "chat", id: "521399572352935940"]]);

_bcvma.push(["pageViewed"]);

var bcLoad = function(){

if(window.bcLoaded) return; window.bcLoaded = true;

var vms = document.createElement("script"); vms.type = "text/javascript"

vms.src = ('https:/==document.location.protocol?'https://':'http://') + "vmss var s = document.getElementsByTagName('script')[0]; s.parentNode.inse

};

if(window.pageViewer && pageViewer.load) pageViewer.load();

else if(document.readyState=="complete") bcLoad();

else if(window.addEventListener) window.addEventListener('load', bcLoad else window.attachEvent('onload', bcLoad);

</script>

Open test page

Important: You must re-generate and re-insert your code when you associate a new/different website or rule set or change the *Pass custom information about customer* setting.

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

- 2. Within Criteria tab:
 - name.
 - or 'support'.
- drop-down.



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

a. Create a **Rule Name**. This name should include the department

b. Fill out the criteria that will determine when a chat should be routed to this department. For example, if Initial Question Contains 'help'

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

| | Criteria | FOLDER | | DEPARTMENT | |
|------------------|----------|---------------------|----|---------------|-----|
| | Actions | - Nome - | * | Support | ~ |
| 10 | • | CATEGORY | | STATUS | |
| - | | - None - | Ψ. | -None - | ~ |
| 12 | | URGENCY | | | |
| U. | | <no change=""></no> | 7 | Difficulty | 4 3 |
| 0 | | OUSTOM FIELD 1 | | CUSTOM MELD 2 | |
| ψ | | - Nome - | ~ | · None - | |
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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.



- Select the date range you're looking for.
- Button, Window, Operator and more.



2. Click **Chat Summary** from the list of reports on the left side of the screen.

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

- 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.

| Snapshot Re | eports Sc | heduled | | | | | | • | NEW REI | PORT |
|---|--|--------------|-----------|-----------|------------|----------------|-------|------------------------------|---------|---------|
| Report | resul | ts | | | | | | | | |
| Title Chat Sum
Run Date 06/0
Time Zone GM | mary By Dat
8/2020 03:1!
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5:48 PM | | | | ilter Reset fi | lters | ¢ 9, | | |
| | | | | Chats | | | | Create .XLS | H:MM:55 | 0 |
| Date + | Total
Clicks | Unavail * | Blocked * | Abandon ~ | Unanswer * | Answered * | AMC | Create .CSV
Re-Run | ISA 🔸 | ACT • |
| 05/08/2020 | 730 | 57 | 0 | 87 | 65 | 521 | 15.8 | Save as Template
Schedule | :02:45 | 0:13:37 |
| 05/09/2020 | 704 | 46 | 0 | 115 | 33 | 510 | 15.2 | 0:06:32 | 0:01:41 | 0:12:07 |

| Chat Summary By Date, Operator | (GMT-05:00) Eastern Standard Time |
|--|-----------------------------------|
| | Reports Choose destination folde |
| Add New Report Grouping | Eroupings |
| Primary grouping: | |
| Date | |
| Additional grouping: | 8 |
| Operator T | |
| Add New Report Filter - | Filters |
| Button: | 8 |
| Closed Between:
05/08/2020 17 → 06/07/2020 17 | |
| ruit day | |

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 multitask 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.

| C D https://agent.bold360.com/work | | | | |
|--|---|---|---|-----------|
| MY ACTIVE CONVERSATIONS (3) | 🙆 Elon Musk 🗢 | | 0 0 F D X A G [°] U [°] | s |
| LIVE SESSIONS (1) | | | | |
| Elon Musk (elon@musk.c.,
Pertiet! We can now expedite [| Chut stantod at Thu, Mar 30, 2017 2.01 AM | Canned Messages Top folder Q. severals. | Visitor information Elso Mark Information | |
| Confirmation_stric_89131464 p. | Where is my order? | bye
Thanks for contacting us. Please do not hesitate to contact us again if we | Chats Lustomer Service | |
| e EMAILS (2) | Hello, my name is Akhil and I will be assisting you today!
Can you please upload your Airway bill? | can be of further assistance.
welcome | this://www.apo51boldchst.com/aL (N/A) (N/A) (N/A) (N/A) (N/A) (N/A) (N/A) (N/A) (N/A) (N/A) | kachat.co |
| Bob Barish
Need help with reordering las_ | 2014 | Hello, my name is Akhil, how may I help you? | | |
| M, I need to place a repeat ord. | (0.20 MB) | | Ores started The, Mar 20, 2017 151 AM | |
| Akhil Talwar
My jetpack wce't deptey
My XRG-JPL7003 wree proc. | Perfect! We can now expedite the shipment to the carrier. Here is your
confirmation statement | | Hello, mý name is Akhil and i will be as | |
| | confirmation_stmt_B9131464.pdt | | hi
Chit staned Thu, Mai 30, 2017 12:15 AM | |
| | 2544 | | Trouble again
Lets take a look at it once again | |
| | | | Chait started Weol, May 28, 2007 (128) PM.
I neceti helps
Hello, lot ine take a look at your proble | |
| | | | Chall stanted Wea, May 29, 2017 9:56 PM
Paloon 9 fuel | |
| | 8 / ឬយក្ឡដ្ឋា | | Chure skierted West, Main 29, 2017 6:04 PM
rocket fluel for falcon X | |
| | Type here to chat. Use "/" for commands. | | Churl started Weck, Mar 29, 2017 4:39 PM
Ni
tosta | |
| | | | Chal started Weit, Mei 29, 2007 A 06 PM
N
helio | |
| | My Wrap-up Transfer End Chat | | Chall standed Wird, May 29, 2007 (2:15 PM) | |





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.

Samantha Hi there. I was hoping you could help

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.

| B / U ග L | | |
|-----------------------|---------------------|--------|
| Type here to chat. Us | e "/" for commands. | |
| | | |
| | | |
| | | |
| | | |
| | | |
| My Wrap-up | Transfer E | nd Cha |

| /cm | Search canned messages 🚽 | | |
|----------|---------------------------------------|--|--|
| /end | End this of | | |
| /tr Trai | ruler to other operators or departmen | | |
| /wr | Prepare wrap-up while chatting | | |
| | | | |
| | | | |

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

| My Wrap-up | Transfer | End |
|------------|----------|-----|
|------------|----------|-----|

| . <u>.</u> | | |
|---------------------|-------------------|--|
| e here to chat. Use | "/" for commands. | |
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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 <u>here</u>.

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 plog.

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: Al 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.

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

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 <u>here</u>.

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.

