



iService Chat

A guide for users of the iService Customer Interaction Solution.



iService Chat

This user guide is intended for users of the iService system. It is not intended to provide information relating to software customization or integration. Feedback regarding this guide should be sent to support@1to1service.com.

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1 Welcome

This User Guide is intended for users responsible for implementing and using the live chat features of iService. It is available in the following formats.



[Online Help](http://www.iservice.info/guides/chat/index.html) - This HTML help (<http://www.iservice.info/guides/chat/index.html>) can be browsed online. You will be automatically directed to the standard, smartphone, or iPad version that is most appropriate for your browser.



[Compiled HTML Help](#) - You can download this Windows Compiled Help file and view it in your browser while offline.



[PDF](#) - Acrobat file for printing.



[iPad / iBook](#) - This is an ePub file for viewing on your iPad.

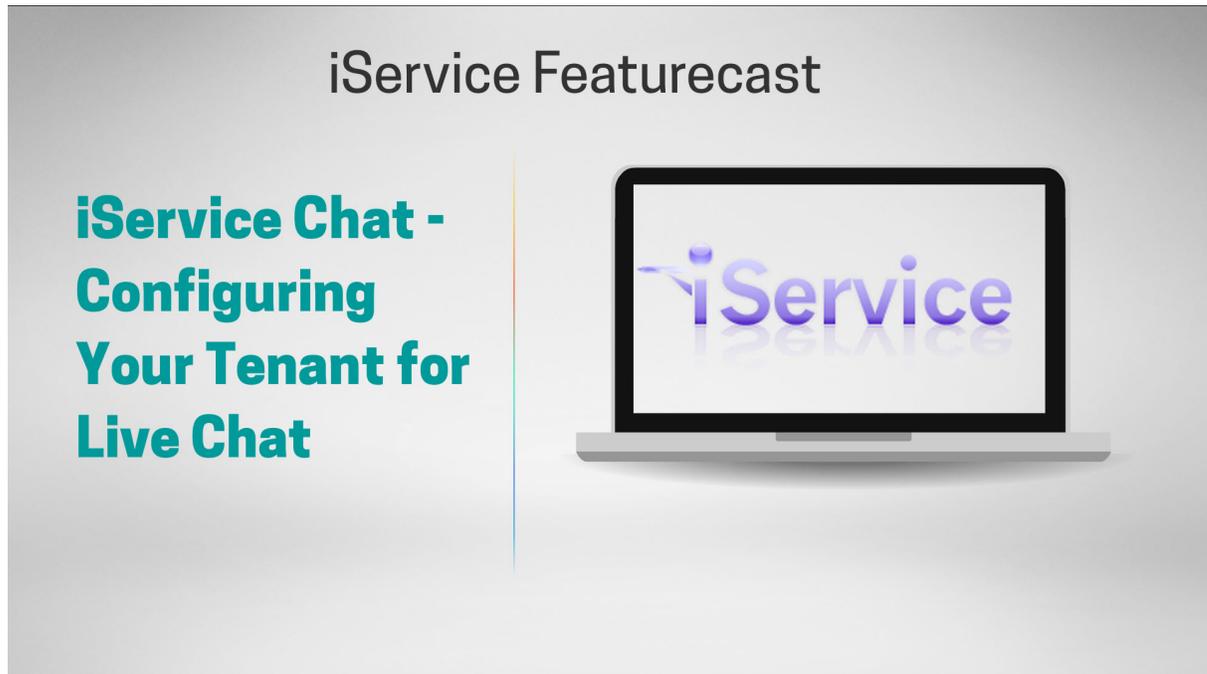
2 Overview

iService Chat is an integrated feature of the iService Customer Interaction Solution that allows your agents to engage in dialogue with your website visitors. As an integrated component of iService, your team has access to the full suite of productivity tools like stock responses, customer history, and the full iService knowledge base while interacting with website visitors. Built on an industry leading COMET server, iService Chat scales very well with little overhead on your website.

The live chat features of iService are built using iService Forms, which allows you to completely customize the pages presented to your website visitors. The chat feature leverages your existing iService configuration, such as business segments, topics, skills, etc. When configuring iService Chat the majority of implementation and setup is related to the customer facing elements such as the website chat button, pre-chat survey, and the customer chat window. In most cases, you can use your existing iService configuration with minimal changes.

3 Implementing Chat

Implementing chat within iService requires setup within two areas: [Customer Chat Pages](#) and [Agent Chat Settings](#). iService Chat uses a set of iService forms commands to display chat availability, pre-chat surveys, and the customer chat window. This implementation chapter focuses on configuring those forms and options for integrating them into your website.



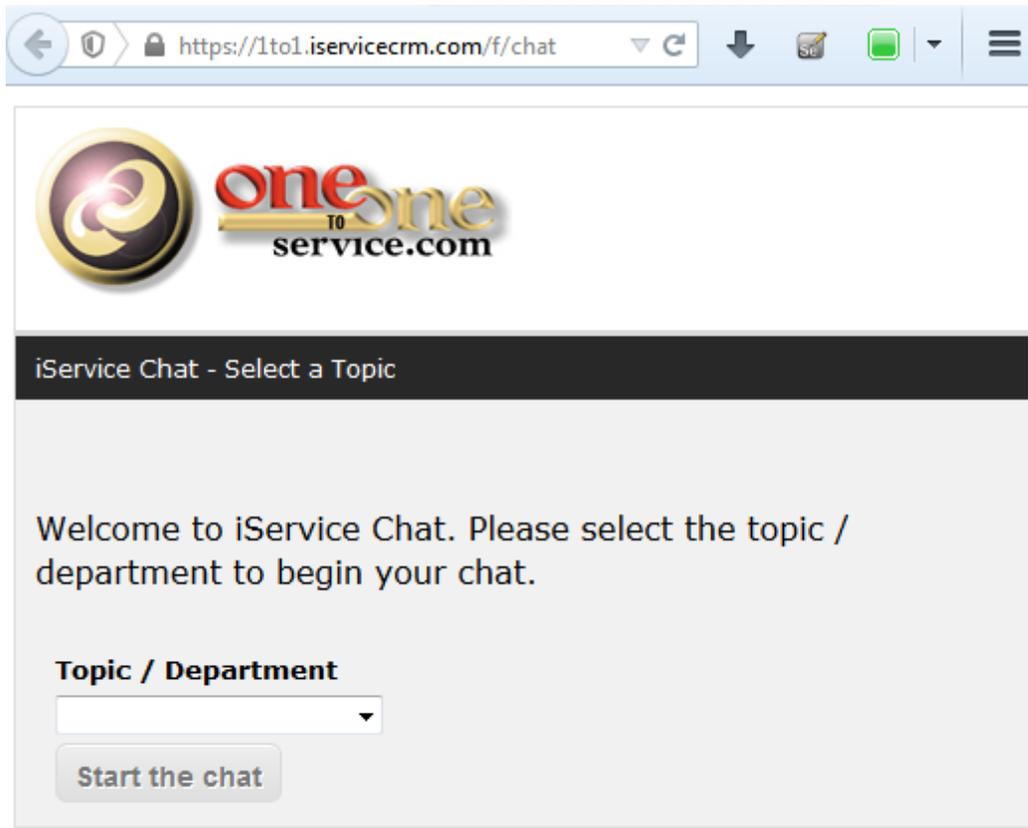
Configuring Chat

3.1 Customer Chat Pages

Your iService tenant includes a functioning customer chat form that's built in to the iService website. The built in form can be customized, or you can use it as a starting point for your own custom chat interface. For details on customizing the built in form, see [Customizing the Built-in Customer Chat Form](#).

Base Customer Chat Form URL

Every iService website has a built in chat form that can be loaded by appending `/f/chat` to the URL of your tenant. For example, <https://1to1.iServiceCRM.com/f/chat> is the location for the iService tenant at <https://1to1.iServiceCRM.com>. This page will look like the following when loaded.



https://1to1.iservicecrm.com/f/chat

 one TO one service.com

iService Chat - Select a Topic

Welcome to iService Chat. Please select the topic / department to begin your chat.

Topic / Department

Start the chat

Powered By: 

The Built-in Customer Chat Form

The Chat Topic / Department List

The built in chat form generates a list of topics from your tenant. However, in many cases you'll want to customize the list with better descriptions and a more limited selection of topics. Learn more about [customizing the built-in form](#).

Customizing the Logo

You can replace the One-to-One Service.com logo with your own company logo. Learn more about [customizing the built-in form](#).

Customizing the Agent Image

When the agent enters the chat, a standard image is displayed in the right panel of the chat window.

one to one service.com

Print Close

Live Chat - Online

Subject: [ref#: 452085-452085] Billing question
Question: I have a question about my most recent invoice.

Replace this image using the faceURL parameter in the url of the chat form.

Hello,
How can I help?

Send

Powered By: iService

The default image can be replaced by passing a new image using the faceURL parameter in the form of faceURL=new_image_url. Learn more about [customizing the built-in form](#).

Setting A Single Topic

If you have a single topic for chat requests, you can take advantage of the [Agent Availability](#) code to toggle to an image between online and offline. Learn more about [customizing the built-in form](#).

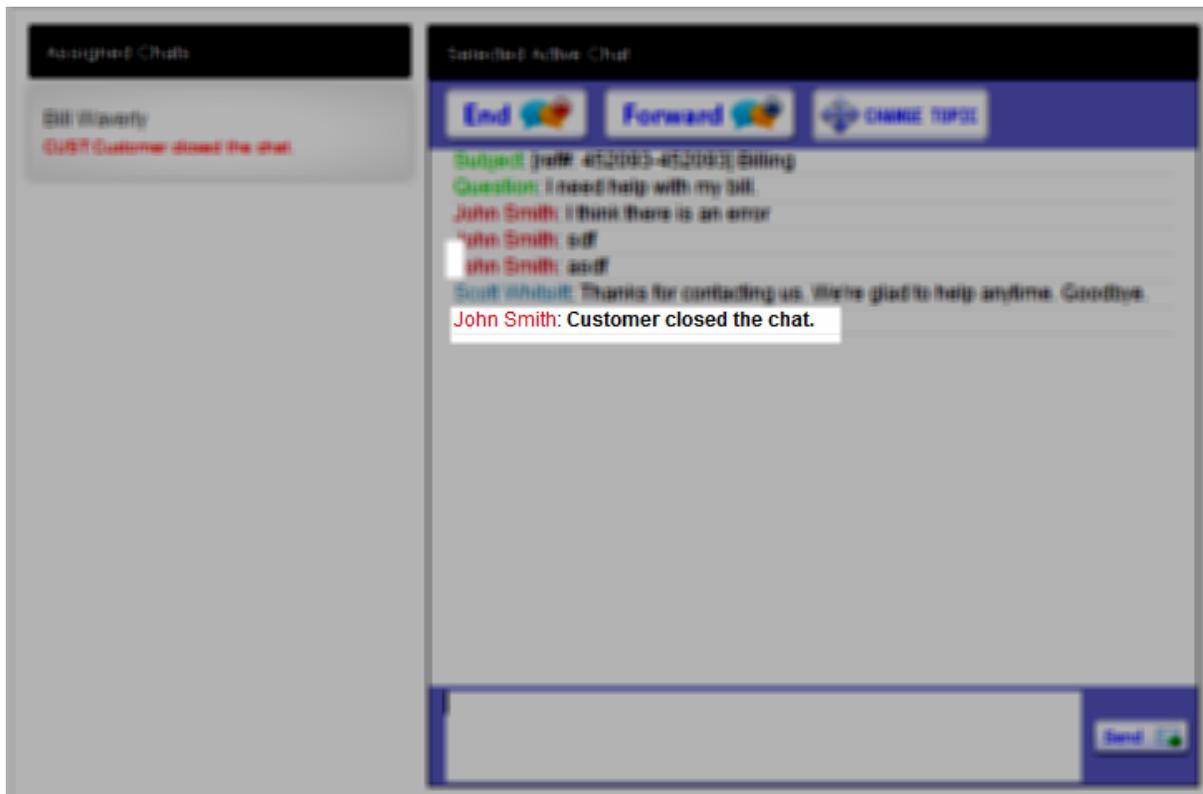
The Sound, Print, and Close Buttons

The customer chat window has three buttons configured at the top of the form. The sound button, print button, and close button.

Sound Button - When an agent text arrives in the customer's chat window, a short sound is played as an alert. The sound button will toggle sound on and off for the customer.

Print Button - The customer can click the Print button to send the current contents of the chat dialogue to their printer.

Close Button - The customer can end the chat by clicking the close button. The chat window will remain open, but text indicating the customer has closed the chat is posted into the dialogue. The agent will see this text for 10 seconds before their chat window is automatically closed, as shown below.



3.1.1 Website Integration Options

iService chat uses a custom iService form that displays the chat button. This form usually includes conditional logic to determine whether you have any agents available to chat with customers, and

displays an appropriate message or image based on that determination. Since your iService website is separate from your corporate website, you will typically place the chat button form within an iFrame. This iFrame can be located anywhere within your page, and using various types of styling can even be located on top of other content (e.g., always in the lower right corner of the browser).

Chat Button Within Page Header

Below is an example of an iFrame embedded within the header of a website that contains the chat availability button.



In the example above, clicking on the image will open a new browser window that contains the offline message form, or the live chat form if agents were available.

Chat Badge Anchored to Browser Window

In the example below, absolute positioning is used to keep the chat badge displayed in the bottom right of the browser. The advantage of this approach is that the code can be placed anywhere on the page, and the absolute positioning will ensure it appears properly on the page.

Form as Embedded iFrame Inside Page

Embedding a small contact us form on each page of a website is a great way to engage website visitors. With iService Chat, these forms can be easily converted to offer a live chat option when agents are available, and revert back to contact us forms when agents are not available.

designed to assist help desks and support environments in efficiently managing their workflows. **This contact us form can automatically load as a Live Chat form if agents are available. The chat window will load in the same place as the contact form.**

Service Provider Edition

iService was built from the ground up to support a "Software as a Service" business model. If you are a service provider looking for a leading eCRM solution to offer your clients, you'll appreciate the ability to quickly add clients with the streamlined upgrade process.

Financial Services Edition

Security and confidentiality is of utmost importance when interacting with depositor, borrowers, and investors. iService provides an integrated secure messaging process that allows you to leverage the Internet for customer interactions ... while maintaining the integrity of every interaction. Our predefined workflow and knowledgebase taxonomies make the Financial Services Edition of iService simple to implement, yet powerful.

IT Compliance Edition

IT Compliance for regulations such as Sarbanes-Oxley, PCI and HIPPA require your organization to document various activities associated with change management, information security, and operations. The IT Compliance Edition of iService helps you

See a Live Demo

Have a question about iService or ways to make your web experience more productive and satisfying for your customers? Want to see a live, no pressure product demonstration?

Ask a question using this iService powered form and we'll be glad to help.

Please Choose One

* First Name

* Last Name

* Email Address

* Company

* Phone Number

* Your Message

SUBMIT >>

Powered by iService

Click to expand image

3.1.2 Agent Availability and Chat Buttons

Since customer's expect a rapid response when requesting live help, iService tracks the status of all agents and their availability for chat in real-time. When a chat agent logs into iService, they are presented with a Go Available \ Go Unavailable button.

iService

CUSTOMER INFO MESSAGE QUEUE FIND ANSWERS ASK A QUESTION MY ACCOUNT

Chat Status: Available **Go Unavailable** Chats Waiting: 0 **Take** Logout Hello, 1to1admin!

My Queue Supervise Chats Search

The "Go Available" button

The "Take Chat" button

My Message Inbox (1) Pending (0) Approve (0) There are no messages to approve. GET NEXT QA There are 2 messages available. GET NEXT

From	Email	Date	Subject	Topic
jointstock.ssp@gmail.com	jointstock.ssp@gmail.com	10/8/2013 2:34:50 AM	[ref#: 16-16] test	All Topics

Page: 1

Select a message.

Clicking this button toggles the agent's status to "Available" or "Unavailable", which is tracked in real-time within the Agent Admin tab. An iService Forms command, \$IF -chat(available) is then used to determine whether the Online or Offline button is displayed on your website. This command is explained further within the iService Forms Developer guide, but operates as shown below.

The \$IF -chat command must be used with a -Ptopic parameter to specify the topic for the chat. This can be hard coded into the chat link, or it can be supplied by the customer when requesting the chat. In order for agents to be available, the following must all be true.

- a. The contact requesting the chat has specified a valid topicID for the chat interaction.
- b. An agent with segment access to the specified topic is logged into iService AND has set their chat status to available.
- c. The available agent has the required Skills for the specified topic.

Example with chat topic hard coded:

```
$If -chat(available) -Ptopic'4'$  
  I am here.  
$Else$  
  I am not here  
$EndIf$
```

For the case where agents are available, a message (or image) with a link can be displayed offering live chat (as shown in the example below).



When clicked, an iService form is used to capture contact information (e.g., email address) before the chat is launched. It's required to capture the user's email address so the interaction history from the chat can be properly archived.

For the case where agents are not available, a message (or image) with a link to an Ask a Question form can be offered to take the customer's message (as shown below).



3.1.3 Using a Topic Selection Page

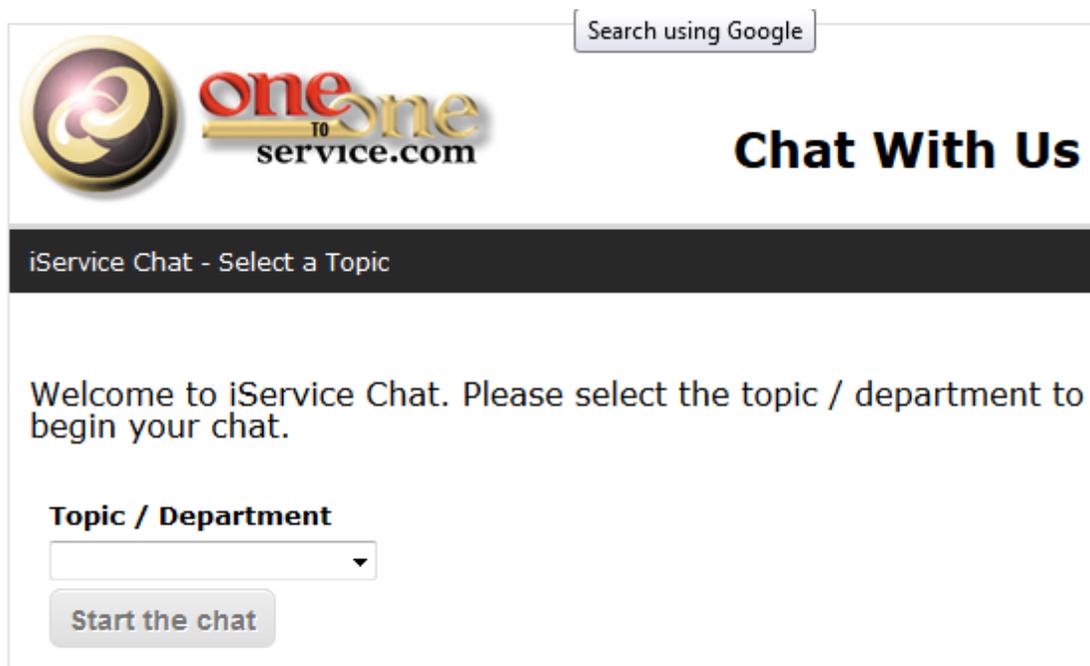
If you are using only one topic for chat, such as Sales or Support, you will most likely just hard code that topic into your chat form or pass it via a URL in the link. However, you can also use the built-in iService Forms Topic Tree command to generate a list of all topics within your segment or

tenant. In this case, the user will first be presented with a drop list of topics that match those in your iService Find Answers page. Once the customer selects a topic and clicks Start the Chat, the next page will be either an Ask a Question form (no agents available for that topic) or a Pre-Chat Survey form (agents are available).

This is illustrated in the example below. This form includes the topic selection within a drop down window.

Topic Selection Page

The first phase of the form presents a topic list to the customer. They select the appropriate topic and click the "Start the chat" button.



The screenshot shows a web interface for "iService Chat". At the top left is the "one to one service.com" logo, which includes a stylized 'e' icon. To the right of the logo is a "Search using Google" button. The main heading is "Chat With Us". Below this is a dark grey bar with the text "iService Chat - Select a Topic". The main content area contains the text: "Welcome to iService Chat. Please select the topic / department to begin your chat." Below this text is a "Topic / Department" label above a dropdown menu. At the bottom of the form is a "Start the chat" button.



No Agents Are Available

If there are no agents available for the topic selected, the following "Ask a question" form is presented.



Contact Us

Live Chat Offline - Leave a Message

We're sorry, but there are no chat operators available. Please leave a message and we will respond as soon as possible.

First Name

Last Name

Email

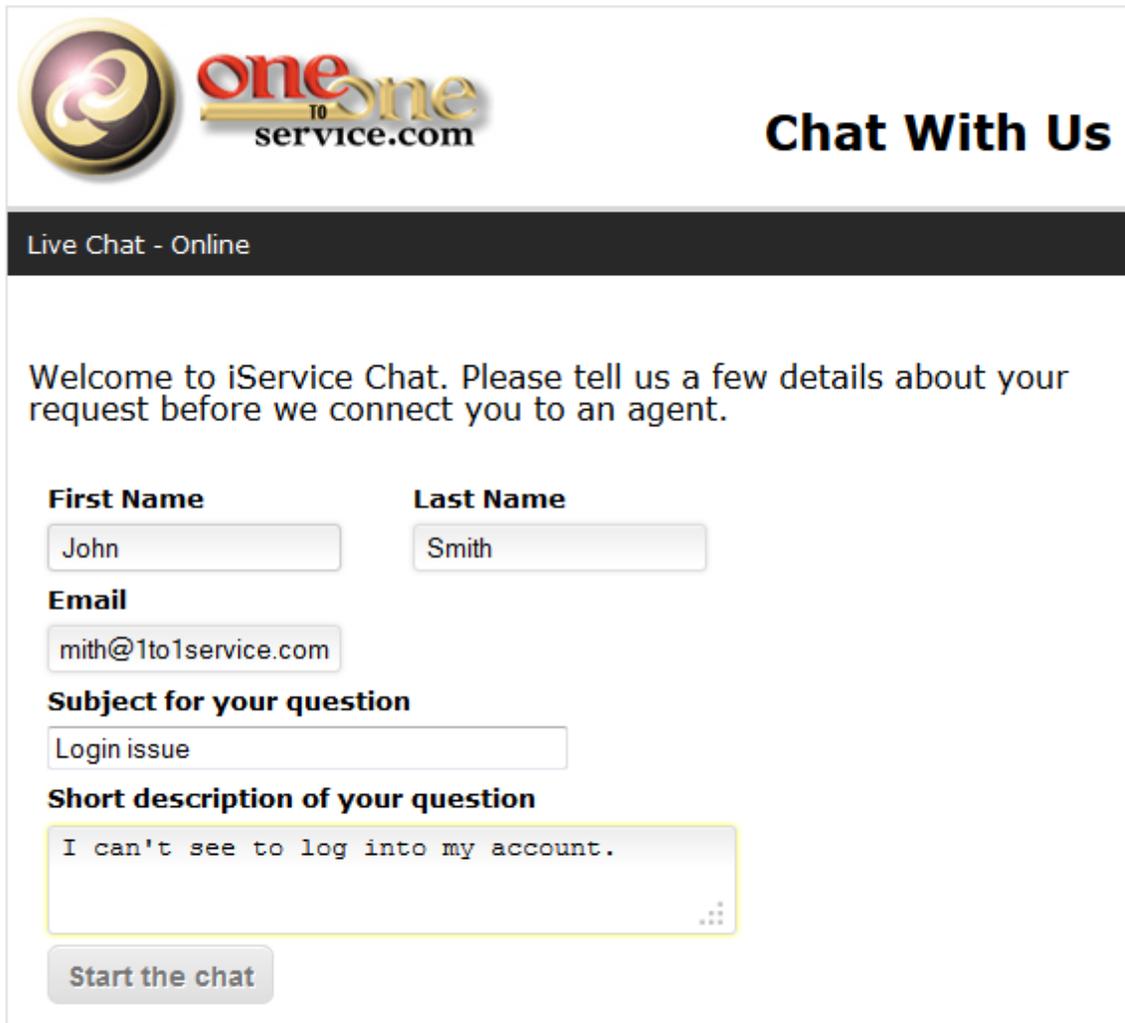
Subject for your question

Short description of your question



Agents Are Available - Pre-Chat Survey

If there are agents available, a form similar to the "Ask a question" form is used to gather information about the customer. When this form is submitted, actions are run to find or create the contact in iService based on the e-mail address entered. The chat is then created with the subject and body entered from this form.



The image shows a chat interface for One-to-One Service.com. At the top left is the company logo, which consists of a stylized 'e' in a circle followed by the text 'one TO one service.com'. To the right of the logo is the heading 'Chat With Us'. Below this is a black bar with the text 'Live Chat - Online'. The main content area contains a welcome message: 'Welcome to iService Chat. Please tell us a few details about your request before we connect you to an agent.' Below the message are several input fields: 'First Name' with the value 'John', 'Last Name' with the value 'Smith', 'Email' with the value 'mith@1to1service.com', 'Subject for your question' with the value 'Login issue', and a larger text area for a 'Short description of your question' containing the text 'I can't see to log into my account.'. At the bottom of the form is a 'Start the chat' button.

one TO one service.com

Chat With Us

Live Chat - Online

Welcome to iService Chat. Please tell us a few details about your request before we connect you to an agent.

First Name
John

Last Name
Smith

Email
mith@1to1service.com

Subject for your question
Login issue

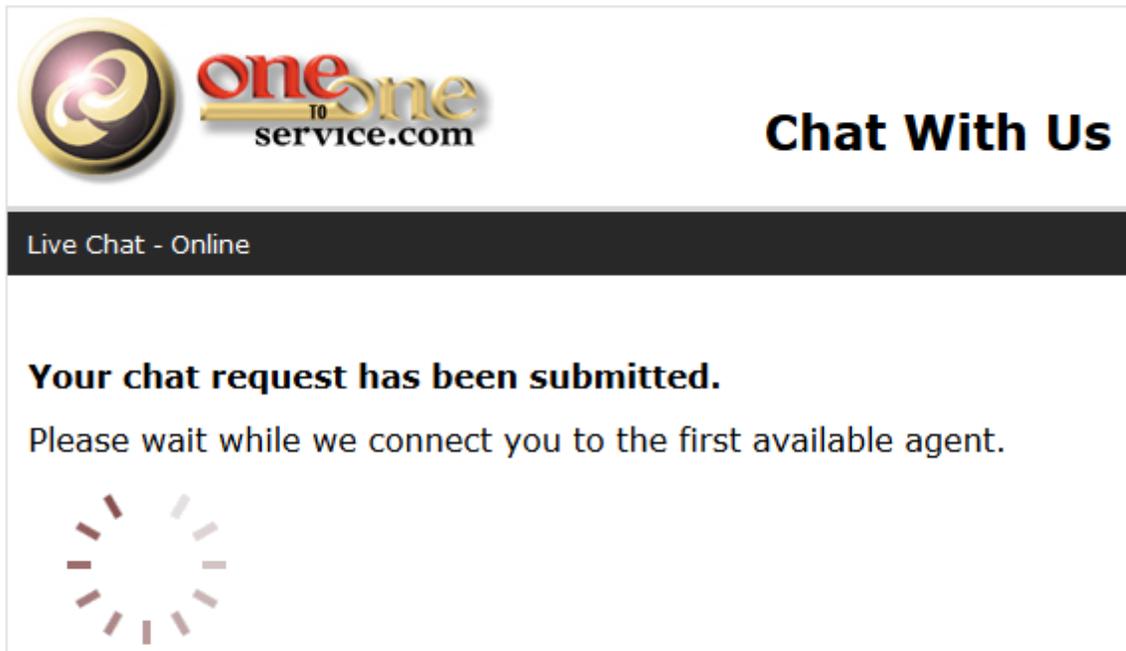
Short description of your question
I can't see to log into my account.

Start the chat



Waiting for Agent

When the chat request is submitted, iService agents are notified and the customer chat form transitions to this waiting page. This page will be presented until the chat is accepted by an agent



Chat With Us

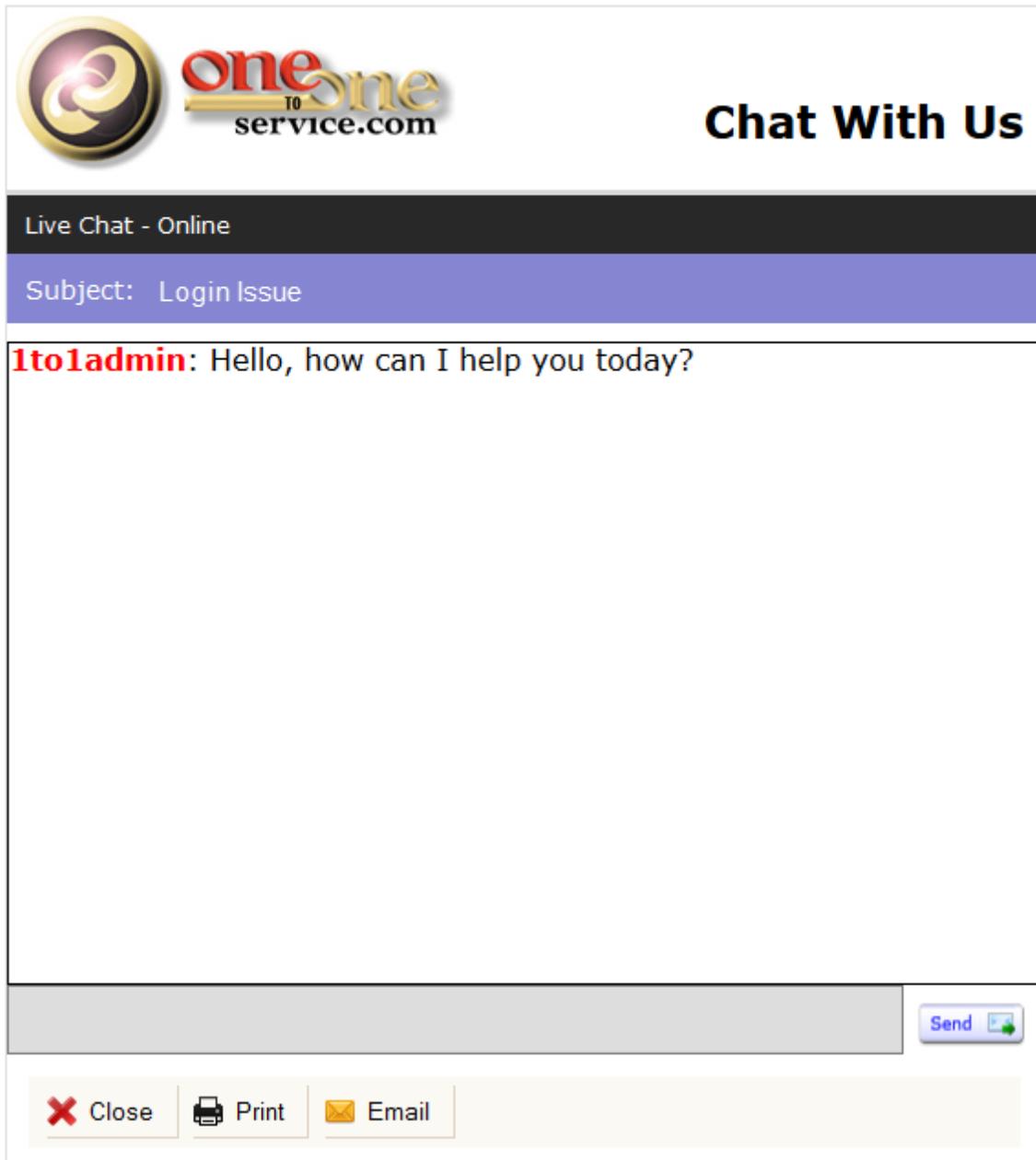
Live Chat - Online

Your chat request has been submitted.
Please wait while we connect you to the first available agent.



Active Chat Window

When the chat is accepted by an agent, the customer chat form will load the active chat HTML as shown below.



one to one
service.com

Chat With Us

Live Chat - Online

Subject: Login Issue

Ito1admin: Hello, how can I help you today?

Send

Close Print Email

3.1.4 Pre-chat Survey Forms

When a customer clicks the Chat Now button, a pre-chat survey form is used to gather information about the customer and their question. This information is presented to the iService agent when they accept the chat so they have a basic idea about the customer's question. Also, the customer's email address is required so their history can be properly archived.

Let's chat! First tell us about yourself.

Email Address:

First Name:

Last Name:

Please describe the problem you're having.

Subject:

Question:

A pre-chat survey form

The iService Chat Interaction is not created until this form is successfully submitted. Once it is submitted, the customer chat window will indicate that the chat request has been submitted and an agent will arrive shortly. At that point the chat interaction record is created and the pending chat will be displayed within the [Manage Chats](#) tab for managers.

Thank you! An agent will be with you shortly...

3.1.5 Customizing the Built-in Customer Chat Form

iService includes a built in customer chat form located at `/f/chat` that can be customized to reflect your own styling. You can use this customer chat window as is, modify it using the process described below. or create new chat windows using the code from this form (`/admin#/formbuiltin/webapp-userchat`) as a template.

Customizing the Built-in Customer Chat Form

To customize the customer chat Window, create a new blank form and using the code below as a template for the form body. Then, change the values as desired for your customization. Only include the var section that will be customized.

```
$include -formID'webapp-userchat'$  
$if -fieldregex'form'='^js$'$$header -filetype(js)$  
  
var logoURL = '$value -rootpath$images/clientLogo.jpg';  
var faceURL = '$value -rootpath$images/agent.png';
```

```
var topics = [
  { 'id': '4', 'name': 'Cars' },
  { 'id': '16', 'name': 'trucks' },
  { 'id': '14', 'name': 'Spaceships' } ]];

$endif$
```

Changing the logo in the top left corner, or the agent logo in the right panel

```
'$value -rootpath$images/clientLogo.jpg' | '$value -rootpath$images/agent.pr
```

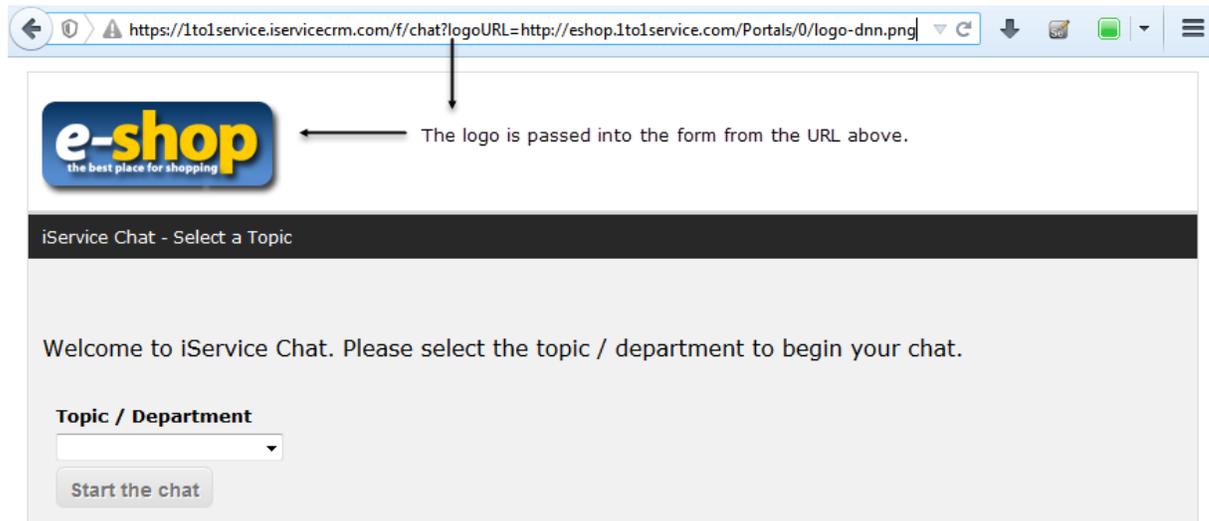
becomes ..

```
'https://URLToNewLogo' to use a URL for the logo, OR
'data:image/jpeg;base64,/9j/4QAYRXhpZgAASUkqAAgAAAAAAAAAAAAAAAAAP/sABFEdWN' to
```

Example:

```
var logoURL = 'http://eshop.1to1service.com/Portals/0/logo-dnn.png' ;
```

Will produce the following customer chat window.



Powered By: iService

Built In Chat Form With Customer Logo

Example:

```
var faceURL = 'http://iservice.info/images/iService_logo_small.jpg' ;
```

Will load a small iService logo where the agent picture was previously shown.

https://1to1service.iservicecrm.com/f/chat?faceURL=http://iservice.info/images/iService_logo_small.jpg

One to One service.com

Print Close

Live Chat - Online

Subject: [ref#: 452092-452092] Billing question
Question: I need to discuss my recent bill.

Alternate image loaded from the URL using the faceURL=URL parameter.

Send

Powered By: 

Changing the topic selection in the Pre-Chat Survey

The built in chat form generates a list of topics from your tenant. The list will include the same topics that are presented by default for the website (base URL) when submitting an Ask a Question form. This is limited to public topics in the segment assigned to that [iService Website](#).

However, in many cases you'll want to customize the list with better descriptions and a more limited selection of topics. You can customize the list by updating the following section of the sample code that was shown above.

```
var topics = [
  { 'id': '4', 'name': 'Cars' },           4 is the topicID for the tc
```

```
{ 'id': '16', 'name': 'Trucks' },           16 is the topicID for the tc
{ 'id': '14', 'name': 'Spaceships' } ];    14 is the topicID for the tc
```

The values Cars, Trucks, and Spaceships are the names shown in the drop down, The values 4, 16 and 14 are the corresponding topicIDs for those topics. Replace this with your own values. The value name is an ID used in the generated HTML that should not be changed.

Example:

```
var topics = [
  { 'id': '1', 'name': 'Sales' },
  { 'id': '12', 'name': 'Support' },
  { 'id': '7', 'name': 'Other' } ];
```

Will produce the following drop down menu.

Powered By: iService

Built In Chat Form With Custom Topic List

Always double check the topicIDs for your tenant when making these edits. You can find the topic IDs in the Segments>Topics page of Admin Tools.

To have all chats go to a single topic

If you have a single topic for chat requests, you can take advantage of the [Agent Availability](#) code to toggle an image between online and offline.

Remove the Var topics section and use the following format for the URL

/f/chat#?topicID=14 where 14 is the topicID for the chats.

This will bypass the Topic / Department selection phase and go straight to the pre-chat survey or the offline message form where the customer enters their email address.

NOTE: When using a customized chat form, you will replace f/chat with f/# where # is the ID of your customized form.

☐ To present the list of public topics in your tenant

To present the full list of topics, remove the Var topics section shown above. The default is to present the list of topics that the user would see in the standard Ask a Question form.

☐ Overriding code within the built in customer chat form

The builtin customer chat form (webapp-userchat) is constructed using AngularJS templates that can be replaced in a new form. For an example of overriding code from the builtin chat form, see the example at

<https://gist.githubusercontent.com/scottwhitsitt/cc71bc1b97eb6975d2fc22f6c0e6217a/raw/b166dc5fa58f1db9cf62fbf7a3edefca1ad59236/gistfile1.txt>. This example includes the base chat form and overrides two sections with new content.

The first section replaces the label Email with UserID in the live chat phase. The second section replaces the label Email with UserID in the offline message phase. This same approach can be used to override any content in the builtin form, including JavaScript.

NOTE: You can include multiple \$if overrides within your customized chat form. For example, the form body below would override both the JS and CSS within the builtin webapp-userchat form.

```
$include -formID'webapp-userchat'$

$if -fieldregex'form'='^js$'$$header -filetype(js)$
var logoURL = '$value -rootpath$images/clientLogo.jpg';
var faceURL = '$value -rootpath$images/agent.png';
var topics = [
  { 'id': '4', 'name': 'Cars' },
  { 'id': '16', 'name': 'JLRNA' },
  { 'id': '14', 'name': 'Spaceships' } ];
$endif$

$if -fieldregex'form'='^css$'$$header -filetype(css)$
.header { background: #8f8; }
$endif$
```

3.1.6 Post-chat Survey and Offline Messages

Offline Messages

Additional iService forms can be used to create offline message pages, or post chat surveys. Within the \$IF -chat(available) command, insert the hyperlink to your offline form for the case where no agents are available, as shown below.

```
$If -chat(available) -Ptopic'4'$ //This means "If agents are available to chat about topic#4"  
    URL to Launch Chat  
$Else$  
    URL to Launch Offline Message Form  
$EndIf$
```

Post-Chat Survey

When the customer ends a chat, a post-chat survey can be loaded into the browser. This survey can use the existing Feedback configuration, which allows you to view the feedback results from within iService Reports. Feedback forms are described in more detail in the following blog post.

<http://www.1to1service.com/Blog/tabid/449/post/iservice-feedback-makes-it-easy-to-listen-to-your-customers/Default.aspx>

3.1.7 Proactive Chat Offering With Timer

If you have pages on your website where users need help most often, you can offer chat proactively after a set amount of time has elapsed. For instance, if a user sits on a page for one minute without taking action it could indicate they have a question about that particular page.

Since iService customer chat forms are HTML, you can use JavaScript to generate custom behaviors. The example below uses a timer to load an iFrame containing the Chat Now button. If there are no agents available, the iService form can either load a Leave a Message form or just load a transparent blank form that will not be seen by the website visitor.

There are many ways to trigger this behavior in JavaScript, but one example is shown below.

```

1 - <html>
2 - <head>
3 - <style type="text/css">
4   .frame{ display: none; }
5 </style>
6 <script src="http://ajax.googleapis.com/ajax/libs/jquery/1.11.0/jquery.min.js"></script>
7 <script type="text/javascript"> $(window).load(function() { setTimeout(function(){ $(''.frame').css('display','block'); }, 10000); });
8 </script>
9 </head>
10 <body>
11 <p>This text is displayed on the page at all times. It represents the body of the page that has the popup chat window embedded.
12 </p>
13 <!--The Div below has the hidden class named "frame" assigned. It will not display until the time specified in the scrip
14 above is reached. 10000 is in mil, representing 10 seconds. When the page is loaded for 10 seconds, the chat window
15 will appear in that iFrame!-->
16 <div class="frame">
17   <iframe src="https://1to1.iservicecrm.com/f/83" style="position:fixed; left:0; z-index: 10000; width:55px;
18   bottom:0; padding:0; margin:0;" height="220" frameBorder="0" allowtransparency="true"></iframe>
19 </div>
20 </body>
21 </html>

```

The code elements are displayed below so they can be easily copied and pasted into your HTML page.

Style

```
.frame{ display: none; }
```

Script

```
<script src="http://ajax.googleapis.com/ajax/libs/jquery/1.11.0/jquery.min.js"></script>
<script type="text/javascript"> $(window).load(function() { setTimeout(function(){ $(
```

Div and iFrame (note: the dimensions of the iFrame src will be your iService form that pops up

```
<div class="frame">
<iframe src="https://1to1.iservicecrm.com/f/83" style="position:fixed; left:0; z-index
```

3.2 Agent Chat Settings

Chat interactions are routed to iService agents that have been designated as "chat" agents. Chat agents are designated by a UserType (Chat.Answer) that enables the various chat management buttons for agents. UserTypes are assigned to agents in the Agent Admin page along with other agent attributes such as Segment Access, Skills, etc.

Creating a Special Chat UserType

Administrators can create an unlimited number of custom user types in the Admin-UserTypes tab, or modify the rights of existing user types. To convert an existing user type to include chat, such as CSR, open that user type and select the **Chat . Answer** right as shown below.

Segments Websites Skills Agents **User Types** Additional D

User Type Name
Administrator
Anonymous
CSR
CSR Manager
Customer
QA CSR
QA Manager
Super User

New User Type

This access right enables the Answer Chat features within iService.

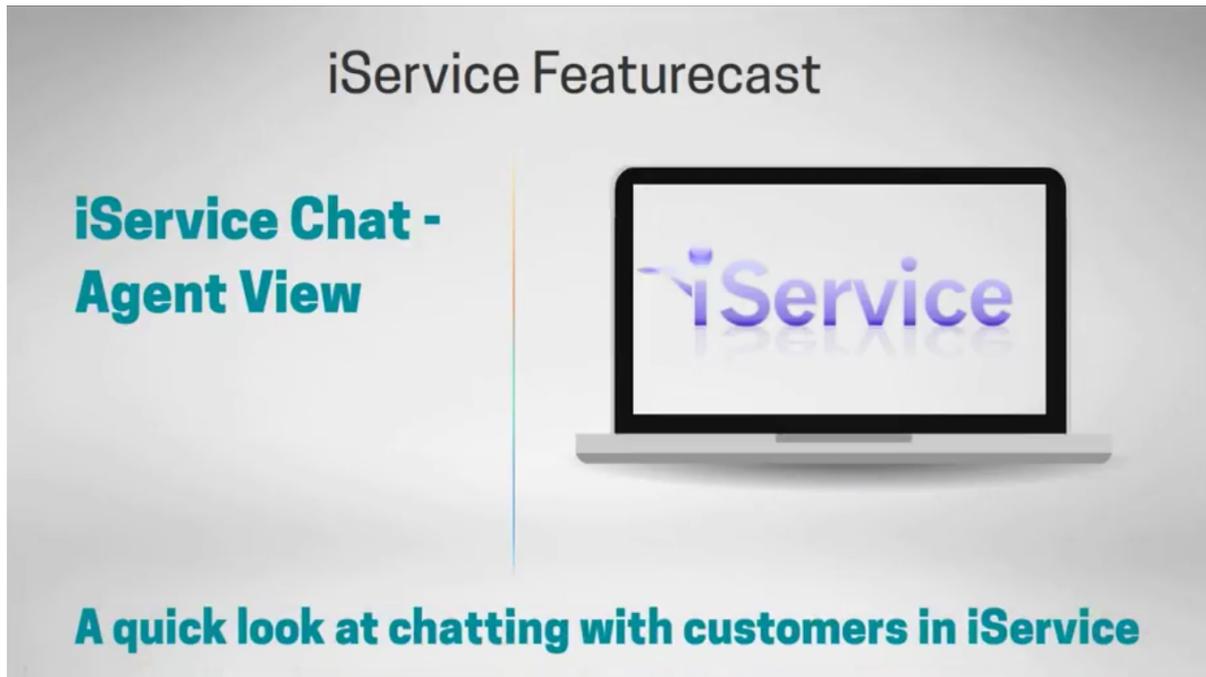
Name: CSR

Access Rights:

- Chat.Answer
- Chat.Broadcast
- Tab.Admin.AdditionalDetails
- Tab.Admin.Agents
- Tab.Admin.Alerts
- Tab.Admin.AppData
- Tab.Admin.ContactProperties
- Tab.Admin.ContactSummary

4 Chatting With Customers

Connecting your agents with customers is a two step process. First, the customer requests a chat by clicking a link on your website. Then, an agent accepts the requests and begins the dialogue. This chapter describes this process and the iService Chat agent interface in more detail.



Agent and Customer View of iService Chat

4.1 Setting Your Status

The "Chat with us" button is only presented to customers when there are iService agents logged in and ready to chat. Agents are only considered available if they have the segment access and skills associated with the topic selected by the customer, and their status is set to "Available". To set your status to available, click the "Go Available" button shown below.

The screenshot shows the iService agent interface. At the top, there is a navigation bar with the iService logo and several menu items: CUSTOMER INFO, MESSAGE QUEUE, FIND ANSWERS, ASK A QUESTION, MY ACCOUNT, and AD. Below the navigation bar, the chat status is shown as 'Available' with a 'Go Unavailable' button and 'Chats Waiting: 0' with a 'Take' button. A 'Logout' button and a greeting 'Hello, 1to1admin!' are also visible. The main content area includes a 'My Queue' section with buttons for 'Supervise', 'Chats', and 'Search'. Below this, there are two buttons: 'The "Go Available" button' and 'The "Take Chat" button'. The interface also displays a message queue with a table of messages and a 'GET NEXT QA' button. The table has the following data:

From	Email	Date	Subject	Topic
jointstock.ssp@gmail.com	jointstock.ssp@gmail.com	10/8/2013 2:34:50 AM	[ref#: 16-16] test	All Topics

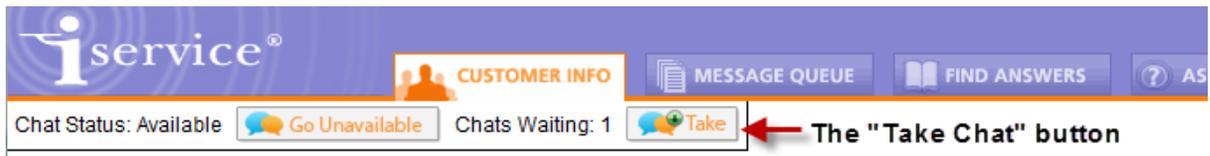
Page: 1

Select a message.

This button will toggle between "Go Available" and "Go Unavailable" depending on your current status. Your current status is shown to the left of this button.

4.2 Accepting Incoming Chats

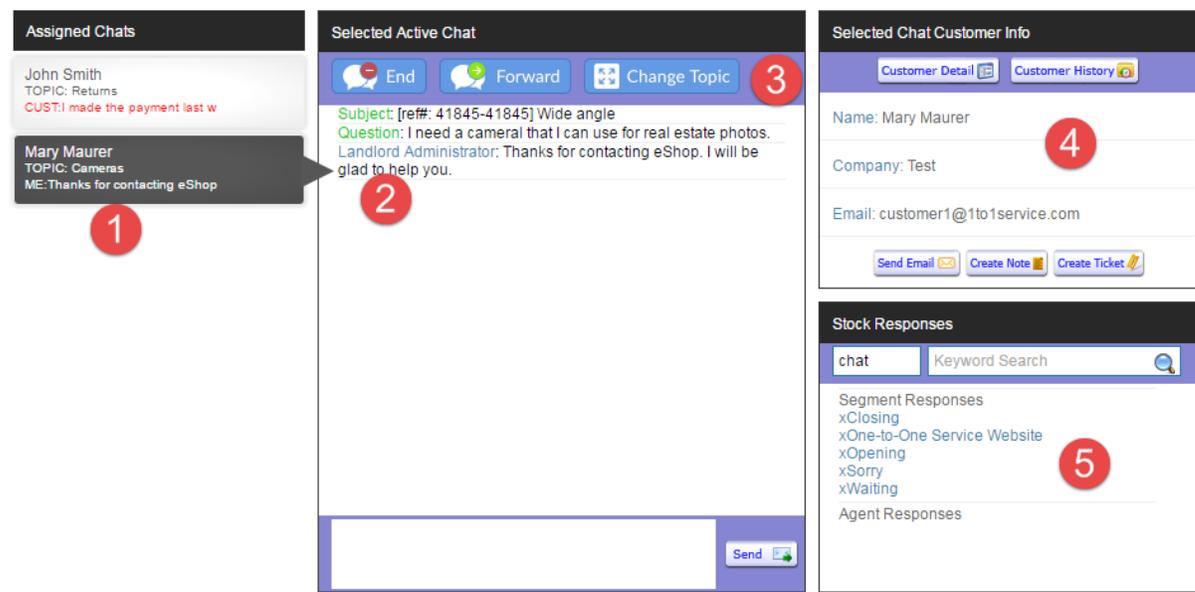
When an incoming chat request is submitted that matches your segment access and skills, the **Accept Chat** button will illuminate and flash indicating a customer is waiting for an agent. To begin chatting with the customer click on the Accept Chat button shown below.



Once you accept the incoming chat, the [Agent Chat Interface](#) will open within your browser where you can begin your chat with the customer.

4.3 The Agent Chat Interface

After an agent accepts an incoming chat, an active chat window populates the top of their iService screen. This active chat window will remain on every page browsed until all of the agent's chats have ended.



The Agent Chat Console

The agent chat interface is comprised of four panels.

1) The Assigned Chats panel provides a list of chats that are assigned to the agent. Clicking a chat bubble will switch the active chat window to that conversation. When the last comment was from the customer, the text snippet in the chat bubble is shown in red. This alerts the agent to the fact that the customer is waiting for their reply. The chat bubble displays the Customer Name, Question Topic, and Last Comment.

2) The Selected Active Chat panel is where the agent types their responses and views messages from the customer. When the initial chat request is assigned, the chat dialogue includes the subject and question from the customer so the agent knows something about the question before they begin the discussion.

3) The action buttons (End, Forward, and Change Topic) function similarly to the buttons within the MyQueue page for emails.

END - Ends the chat and sends the message "Agent closed the chat." to the customer's chat window. The chat will remain visible to the agent for 10 seconds before it is removed from the list of assigned chats.

FORWARD - This button include two options: Remove From Queue and Assign to Agent. Remove from queue will put the chat back into the queue for the next agent. The Assign to Agent option displays a list of agents that are online AND have their chat status set to Available.

CHANGE TOPIC - This button provides the full list of topics that can accept chats. Only topics that have available agents with the corresponding skills are available for selection.

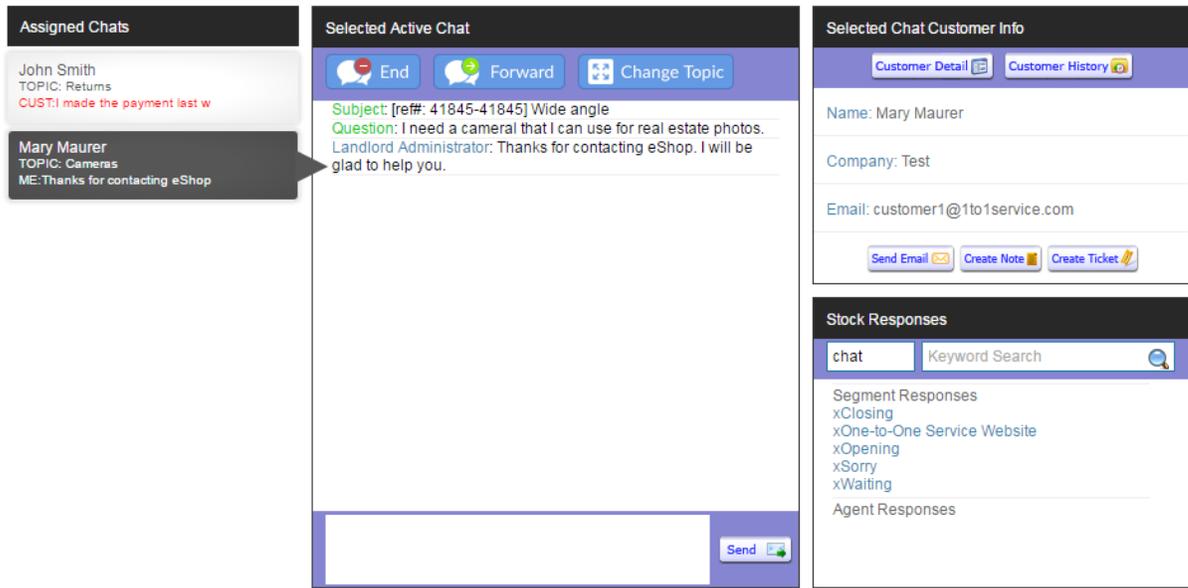
4) The Selected Chat Customer Info panel provides summary information about the customer, and shortcut links to the Customer Info page for the contact.

5) The Stock Responses panel is used by agents to paste frequently used phrases into the chat conversation. The response picker has two text boxes. The first is used to filter the response list, normally to limit the responses to those that were specifically intended for chat interactions. The second text box allows the agent to search for specific responses, and narrows the list as the agent types.

4.3.1 Assigned Chats

When the customer begins a chat (pre-chat survey is submitted), a chat interaction record is recorded in iService and a cookie is recorded on the customer's computer. This cookie allows the chat session to be reopened if the customer closes their browser or loses their internet connection. If the iService web server is unable to contact the customer's browser for 5 minutes, the chat will be resolved and recorded to history. An agent can also end and resolve a chat interaction by clicking the End button.

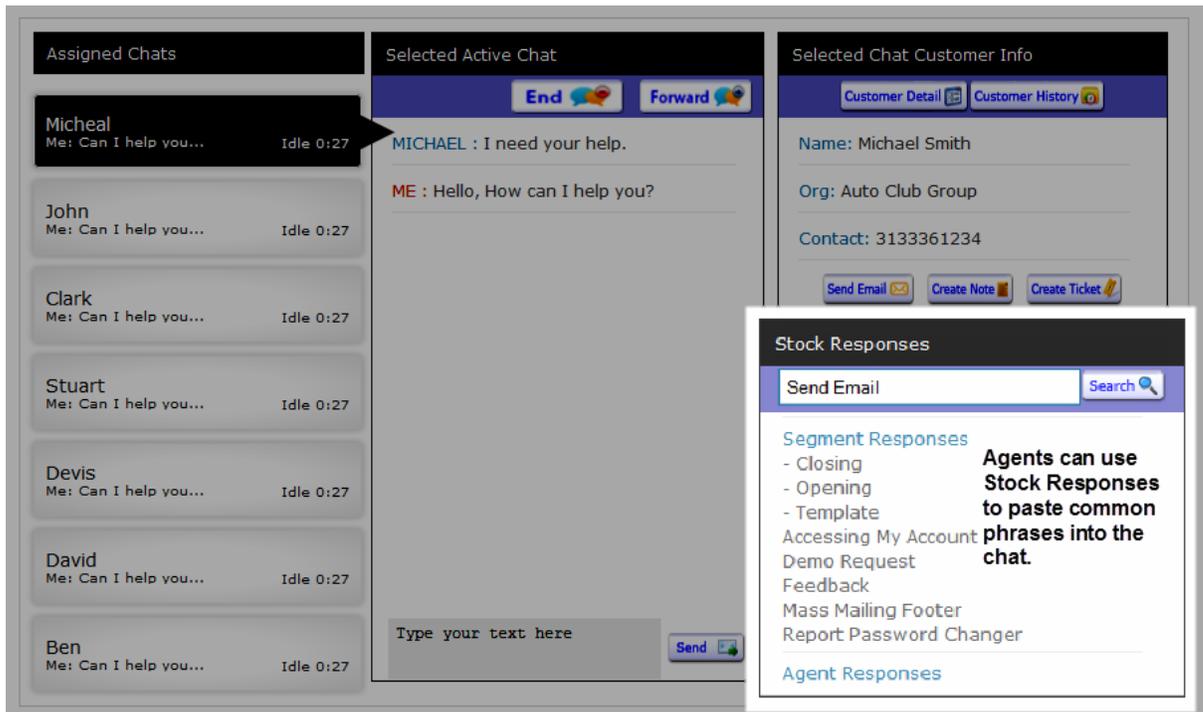
Agents can interact with more than one website visitor at a time. When the agent has more than one live chat assigned, they will only see one "active" chat window at a time. The other chat windows will be minimized and shown to the left of the active chat window. To switch between chat windows, click on the desired chat summary to the left.



Click to expand

4.3.2 Using Stock Responses

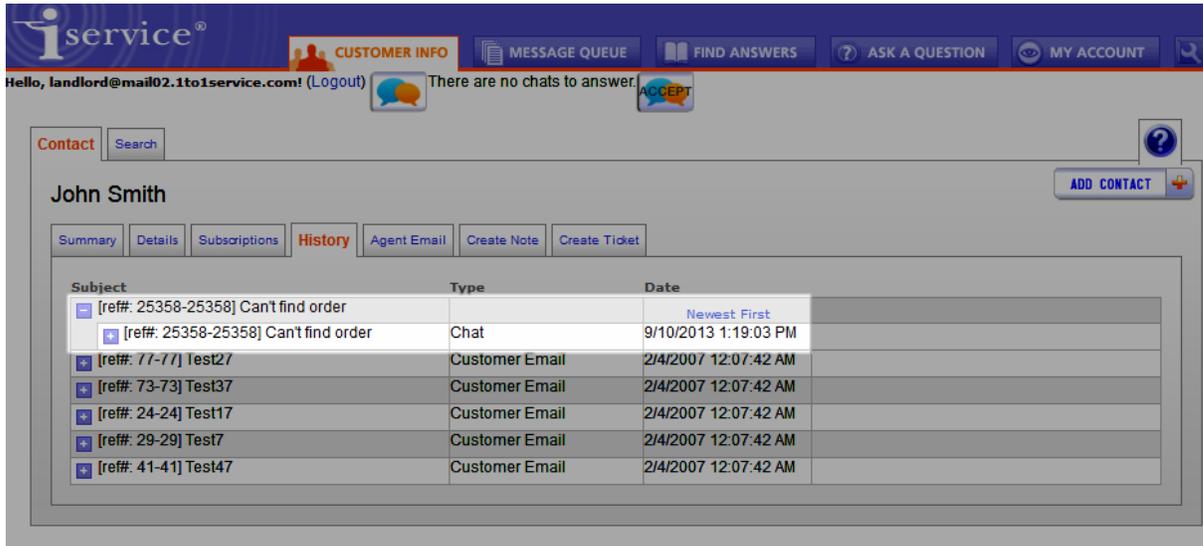
iService chat provides direct access to the Segment and Agent stock responses created as part of the overall iService installation. To paste a stock response into your chat edit window, select the response and click it's name.



Click to expand

4.4 Chat Transcripts / History

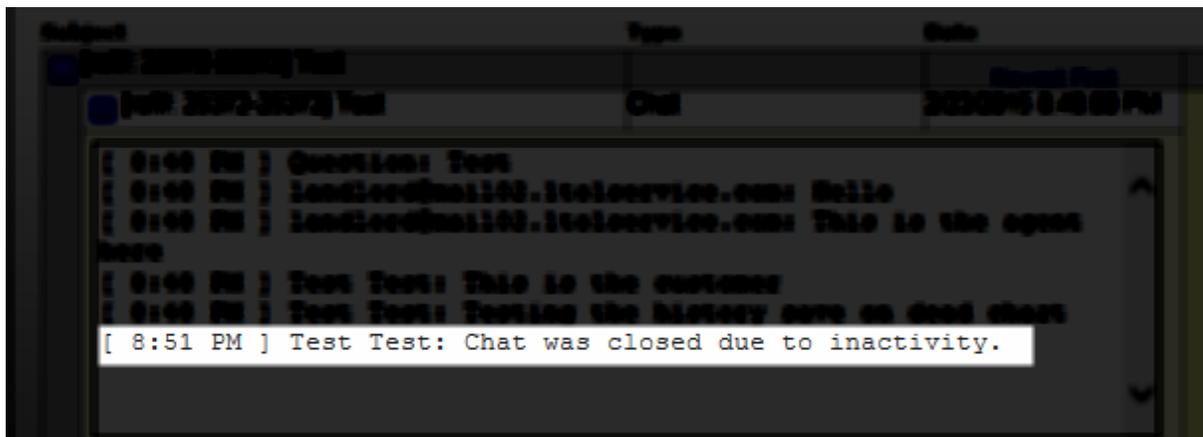
When a chat is resolved, the complete history is archived into the iService database. You can view this history from the contact's Customer Info - History tab. The customer can also view this history from their My Account - History tab.



Subject	Type	Date
[ref#: 25358-25358] Can't find order		
[ref#: 25358-25358] Can't find order	Chat	9/10/2013 1:19:03 PM
[ref#: 77-77] Test27	Customer Email	2/4/2007 12:07:42 AM
[ref#: 73-73] Test37	Customer Email	2/4/2007 12:07:42 AM
[ref#: 24-24] Test17	Customer Email	2/4/2007 12:07:42 AM
[ref#: 29-29] Test7	Customer Email	2/4/2007 12:07:42 AM
[ref#: 41-41] Test47	Customer Email	2/4/2007 12:07:42 AM

Click to expand

When a customer closes their chat window without ending the chat, iService will close the chat for inactivity after approximately two minutes. When this happens, the final entry in the chat history will indicate the chat was closed for inactivity.

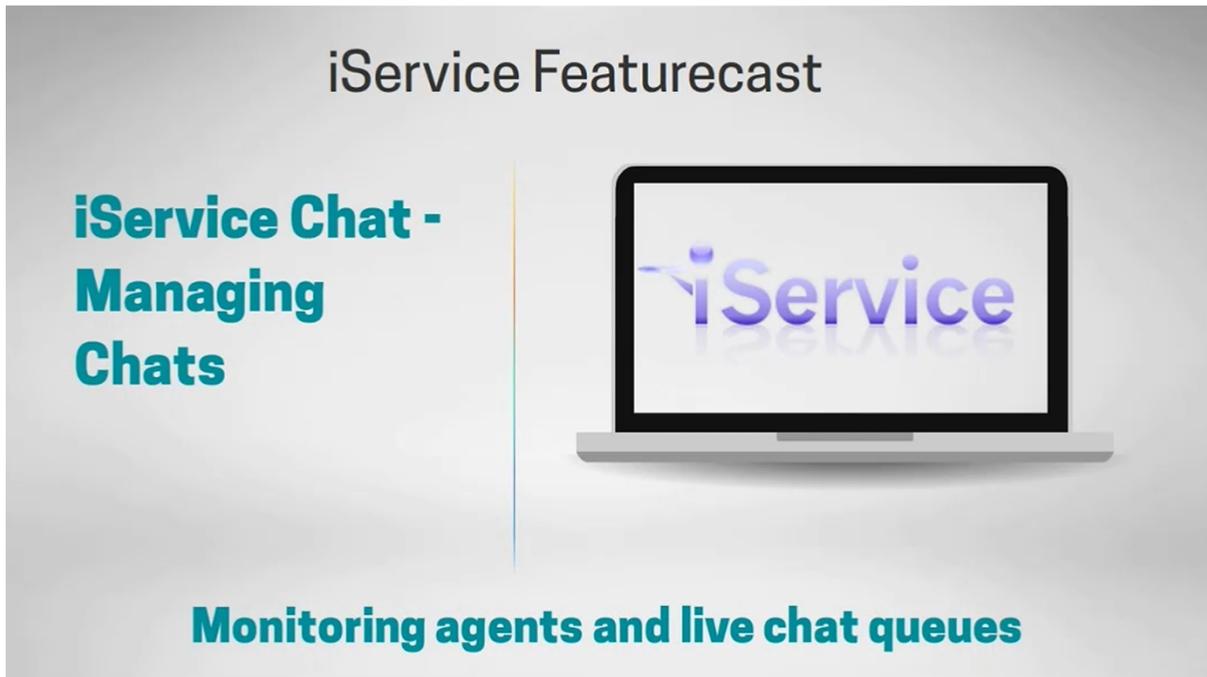


[8:51 PM] Test Test: Chat was closed due to inactivity.

This only occurs when the chat window is disconnected by the customer ... either the browser is closed or the customer loses their internet connection. The customer may remain idle for an indefinite amount of time and continue in the chat so long as their internet connection to the iService site is maintained.

5 Managing Chats

iService Chat interactions are an integrated part of the iService system. They contain the same audit trail information as other interactions, such as customer email. This chapter describes a few of the ways a supervisor can monitor their chat installation.



Overview of the Manage Chats pages

5.1 Monitoring Chat Queues

Agents with the Chat.Supervise usertype access right can view the Manage Chats page. This page lists the details of all waiting and assigned chats (Active Chats page), and the status of all chat agents that are logged into iService (the Logged in Agents page). Watch the video below for a short overview of these pages.

The screenshot shows the 'Manage Active Chats' page in iService. At the top, there are tabs for 'My Queue', 'Manage Msgs', 'Manage Chats', and 'Search'. Below these are 'Active Chats' and 'Logged In Agents' sections. The 'Topic' list on the left includes categories like '_Feedback', '_Newsletter Subscription', '_Spam', '_Undeliverable', 'Account Questions', 'Orders', 'Refunds', 'Returns', 'Products', 'Audio-Video', 'Cameras', 'Cell Phones', 'Computers', 'Televisions', 'Shipping', and 'Technical Support'. The 'Logged In Agents' section shows a table with columns for 'Subject', 'Visitor ID', 'Operator', 'Time In Chat', and 'Wait Time'. The 'Active Chat Dialogue' window on the right shows a chat with 'John Smith' from 'ACME Products' regarding a 'Product question' about a new LCD tv. The dialogue includes a subject line, a question, and a response from the 'e-shop Administrator'.

The Manage Active Chats Page

- 1) Topic:** This is the topic selected by the customer, or hard coded into the chat link. This topic determines the agents to which the chat is routed based on agent skills.
- 2) Available Agents:** The number of chat agents logged in and available that have skills for the topic.
- 3) Waiting Chats:** The number of chats in each topic requested by customers that are waiting for an agent.
- 4) Assigned Chats:** The number of chats in each topic assigned to an agent.
- 5) Subject:** The subject of the chat entered by the customer or selected from a menu in the customer chat window.
- 6) Visitor ID:** The customer's name.
- 7) Operator:** The iService Agent currently assigned to the chat.
- 8) Time in Chat:** The time since the initial operator accepted the chat. This is updated in real-time on the chat supervise page.
- 9) Wait Time:** The time the customer waited before their chat request was accepted. This is updated in real-time until the chat is assigned.

5.2 Monitoring Agent Status

The Logged in Agents page lists all iService agents that have the Chat.Answer right that are logged into iService.

The screenshot shows the iService chat management interface. At the top, there are navigation tabs: CUSTOMER INFO, MESSAGE QUEUE, FIND ANSWERS, ASK A QUESTION, MY ACCOUNT, and ADMIN TOOLS. Below these, the chat status is 'Available' and there are buttons for 'Go Unavailable' and 'Chats Waiting: 0'. A 'Logout' button and the user name 'Hello, Service E. Manager!' are also visible.

The main content area is titled 'Manage Chats' and contains a table of logged-in agents. The table has the following columns:

- 1) Available:** A column of colored circles (green for available, red for unavailable) with a 'z' and 'A' icon for sorting.
- 2) Agent Name:** The name of the agent.
- 3) Assigned:** The number of chats currently assigned to the agent.
- 4) Completed Today:** The number of chats completed today.
- 5) Today's Activity:** A bar chart showing the number of assigned (blue) and completed (yellow) chats.

The table data is as follows:

Available	Agent Name	Assigned	Completed Today	Today's Activity
●	Gil Harris	0	1	■
●	John Walker	0	2	■
●	Justin Case	0	7	■
●	Service E. Manager	0	0	■
●	Shannon MacLeod	0	7	■
●	Landlord Administrator	1	1	■ ■

At the bottom of the page, there is a copyright notice: © 2008-2017 One-to-One Service.com. All rights reserved. Powered by iService Version: 7.6.056 - 2017.03.26 - 11:49:06. An 'Anti-Spam Policy' link is also present.

Managing Logged in Agents

- 1) Available:** This column shows the status of all chat agents that are logged in. Available agents are shown in green, and agents that have set their status to unavailable are shown in red.
- 2) Agent Name:** The display name for the agent.
- 3) Assigned:** The number of chats that are currently assigned to the agent.
- 4) Completed Today:** The number of chats the agent has completed today (since midnight).
- 5) Today's Activity:** This is a graphical representation of the assigned and completed to date columns.

6 Reporting

The iService Business Intelligence and Reporting system provides a variety of reports that help you understand your live chat activities. These reports provide details related to your agent activities as well as customer support trends. For more details, see the [iService Business Intelligence Reports User Guide](#).

Agent Interactions by Type

The Agent Interactions reports provide a count of interactions handled by the selected agents during a specified time period. They show how active each of the selected agents were during the time frame specified. The time frame for the report is based upon the date / time the agent completed their chat.

Topic Summary

The Topic Summary Report counts all chats that were received by the selected segment during the time frame specified. It displays their total by topic so you can identify the most active queues.

Chats by Time of Day

The time of day report displays the number of chats received during the day divided into 24 hourly categories. This report can be used to determine your most optimal staffing levels during the day.

Interactions by Type – grouped by customer

The Interactions by Type - Grouped by Contact or Company displays the total chats received by contact, or by company with subtotals for each contact at that company. This report provides insight into the contacts that request the most chats, which can indicate an opportunity for training or a potential customer issue that requires intervention. When viewed by company, it provides insight into your most active clients and can be an indication of the cost associated with supporting that client. The contacts listed within the report can be clicked to open the history tab for that client.

Forwarding Reports

The Forwarding Analysis report provides insight into how often your agents forward chats. This is useful to determine whether your live chat links are using the correct topics and whether you have properly trained staff associated with these topics/queues.

It begins with a summary (By Agent) for selected agents and a time frame, and includes a drill through to analyze agent activity further by topic and by chat interaction.

Average Response Time

The Agent Response Time reports calculate the average overall response time for chat interactions handled by each agent. Begin by running the response time by agent report, and then drill through to see detail for each agent.

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<http://www.iService.info>

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