


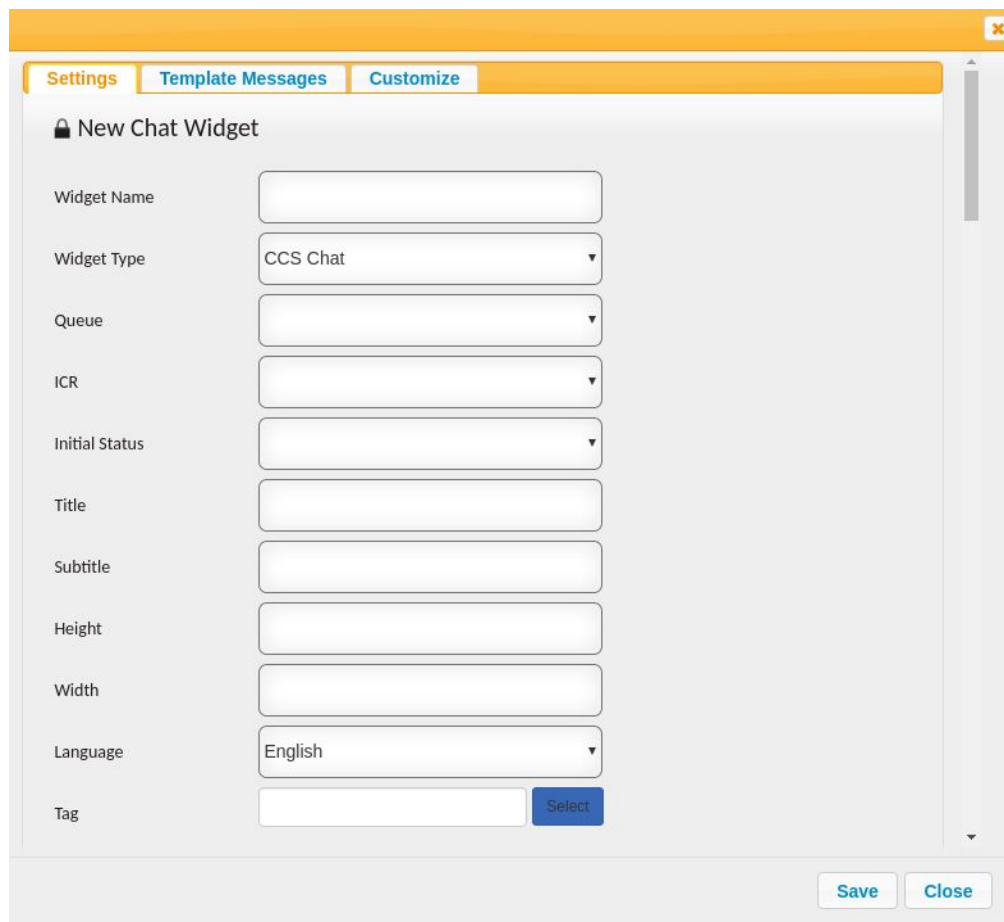
Chat Widgets



Creating a CCS Chat Widget (Settings Tab)

CCS chat widget is another name for creating a web chat widget.

1. Click the “New” button, , located in the top right corner of the Chat Widget screen, the following pop-up screen will appear as shown below:



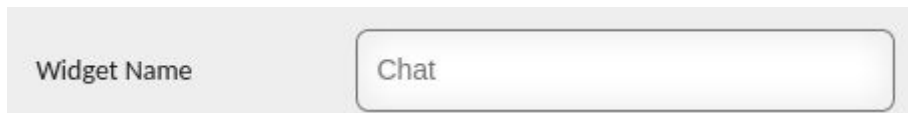
The screenshot shows a pop-up window titled "New Chat Widget" with a close button in the top right corner. The window has three tabs: "Settings" (selected), "Template Messages", and "Customize". The form contains the following fields:

- Widget Name: Text input field
- Widget Type: Dropdown menu with "CCS Chat" selected
- Queue: Dropdown menu
- ICR: Dropdown menu
- Initial Status: Dropdown menu
- Title: Text input field
- Subtitle: Text input field
- Height: Text input field
- Width: Text input field
- Language: Dropdown menu with "English" selected
- Tag: Text input field with a "Select" button next to it

At the bottom right of the form are "Save" and "Close" buttons.

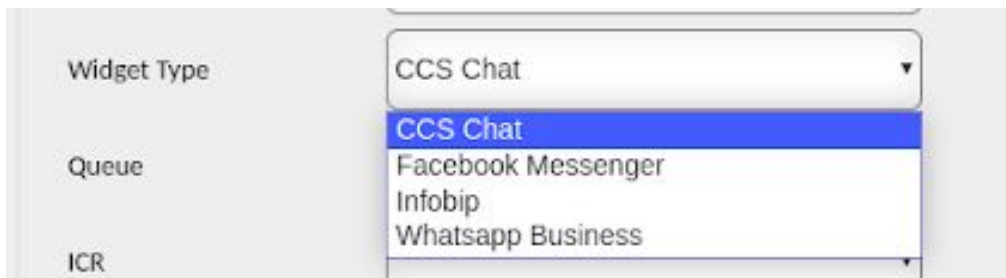
Note: All the input boxes are not shown in this photo; the user has to use the scroll bar on the right-hand side of the input box to view the additional input boxes.

2. Click the “Widget Name” input box, type the desired name an example is shown below:



Widget Name	Chat
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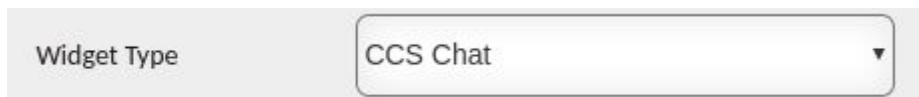
3. Click the “Widget Type” input box. A dropdown menu will appear an example is shown below:



Widget Type	CCS Chat
Queue	
ICR	

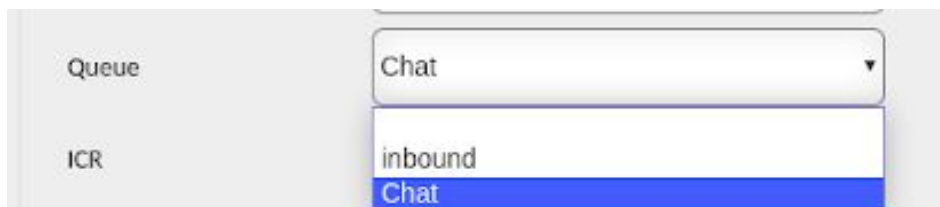
- CCS Chat
- Facebook Messenger
- Infobip
- Whatsapp Business

4. Select the “CCS Chat” widget from the dropdown list an example selection is shown below:



Widget Type	CCS Chat
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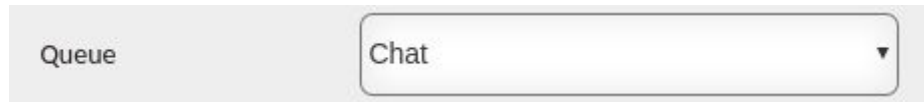
5. Click the “Queue” input box, a dropdown menu will appear with available queue selections (See Queue Section to enable chat on a queue) an example is shown below:



Queue	Chat
ICR	

- Chat
- inbound
- Chat

6. Select the desired queue from the dropdown list an example selection is shown below:

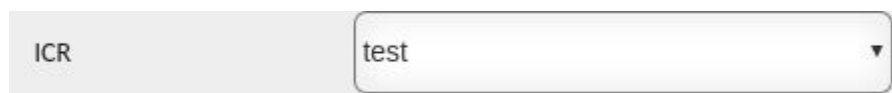
A screenshot of a user interface showing a label 'Queue' next to a dropdown menu. The dropdown menu is open, displaying the selected option 'Chat'.

7. Select the “ICR” input box, a dropdown menu will appear with ICR selections (See the ICR section for more details) an example is shown below :

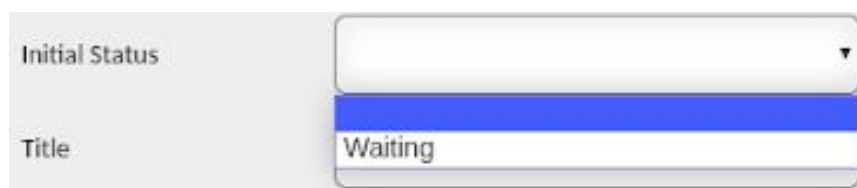
A screenshot of a user interface showing a label 'ICR' next to a dropdown menu. The dropdown menu is open, displaying a list of options with 'test' selected and highlighted in blue.

Note: Interactive Chat Response brings an IVR tree to a chat platform. It can be used in all chat channels, webchat, Facebook, WhatsApp, etc. It enables customers to self select their queues, make requests, etc.

8. Select an ICR from the dropdown list, if desired. An example selection is shown below:

A screenshot of a user interface showing a label 'ICR' next to a dropdown menu. The dropdown menu is open, displaying the selected option 'test'.

9. Click the “Initial Status” input box a dropdown menu will appear. An example is shown below:

A screenshot of a user interface showing a label 'Initial Status' next to a dropdown menu. The dropdown menu is open, displaying a list of options with 'Waiting' selected and highlighted in blue.

Note: This selection can only be used when an ICR is not used. This status is used for reporting to show the initial status as “waiting,” “blank,” or “ICR Status.”

10. Select the desired initial status or none at all from the dropdown selection, an example selection is shown below:

Initial Status	Waiting ▼
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11. Click the “Title” input box, type a name for the Chat (Customer will be able to see the title when using webchat only) an example is shown below:

Title	Live Support
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12. Click the “Subtitle” input box, type a name for the subtitle of the chat (can be the same as the chat title) an example is shown below:

Subtitle	Live Support
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Note: A subtitle needs to be entered to create the chat widget.

13. Click the “Height” input box type the desired height (Pixels) of the chat window.

An example is shown below:

Height	300
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14. Click the “Width” input box type the desired width (Pixels) of the chat window.

An example is shown below:


Width	300
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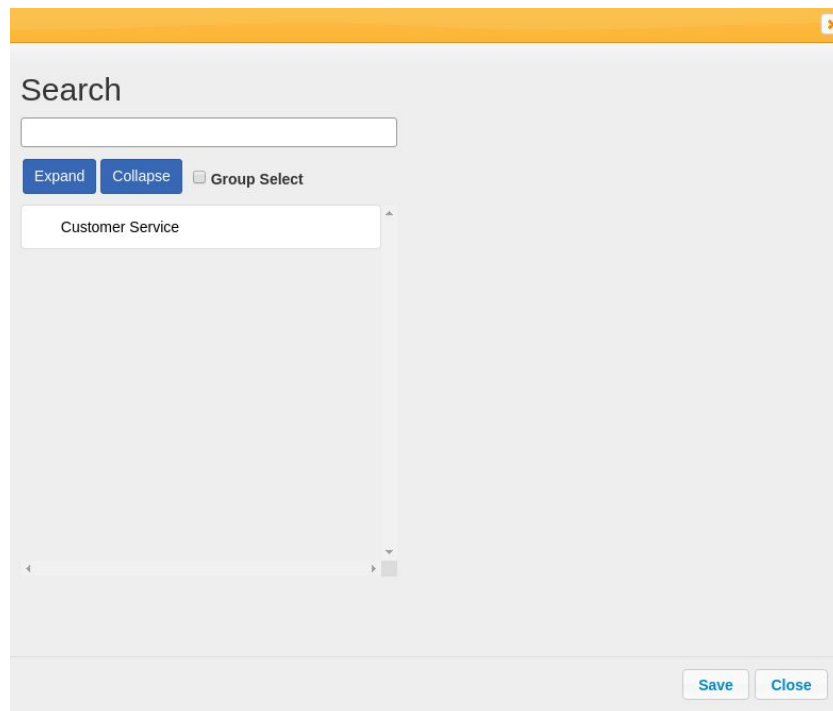
15. Click the “Language” input box. A dropdown list of added languages to the tenant will appear in the following example Turkish, and English were added to the tenant as shown below (Other languages can be added by contacting the Call Center Studio Project Manager):

A screenshot of a web form with two labels: "Language" and "Tag". The "Language" label is positioned above a dropdown menu that is currently open, showing a list of options: "English" (highlighted in blue) and "Turkish".

16. Select the desired language from the dropdown list. An example is shown below:

A screenshot of a web form showing the "Language" label next to a dropdown menu. The dropdown menu is closed, and "English" is displayed as the selected option.

17. If a tag is desired, click the Select button,  to the right of the “Tag” input box, the following pop-up window will appear:

A screenshot of a pop-up window titled "Search". It features a search input field at the top. Below the input field are three buttons: "Expand", "Collapse", and "Group Select" (which is disabled). A list of search results is displayed below the buttons, with "Customer Service" as the first item. At the bottom right of the window are "Save" and "Close" buttons.

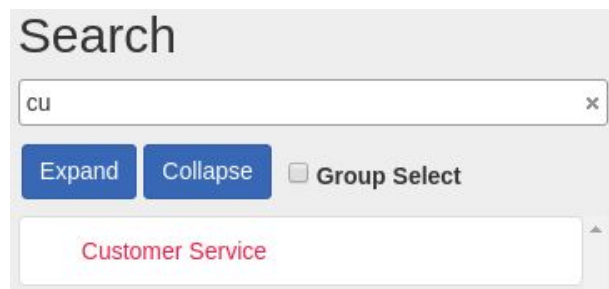
*Note: Only Tags made available for the chat can be viewed here (See **Tag** Section)*

18. Search for a Tag using the “Search” input box shown below:




A search input box with the label "Search" above it. The input field is empty and has a light gray border.


Note: Partial Tag names can be used for searching purposes. All Tags with the partial name will have their name appear in red font as shown below:



A search interface showing the results for the search "CU". The input box contains "CU" and a clear button (x). Below the input box are two buttons: "Expand" and "Collapse", and a checkbox labeled "Group Select". Below these is a list of results, with "Customer Service" highlighted in red text.

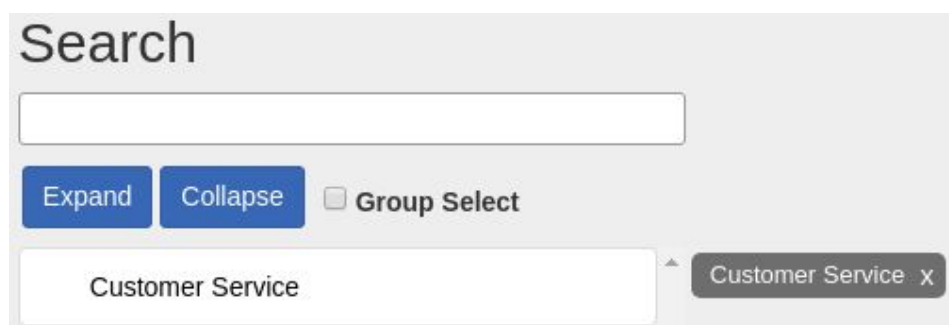
Note:

Press the Expand button, , to expand the selection (Used for child tags)


Press the Collapse button, , to collapse the selection (Used for child tags)

Check the Group Select Checkbox, , to group select tags

Once a Tag is selected in the pop-up window, it can be viewed to the right of the tag list box, as shown below:

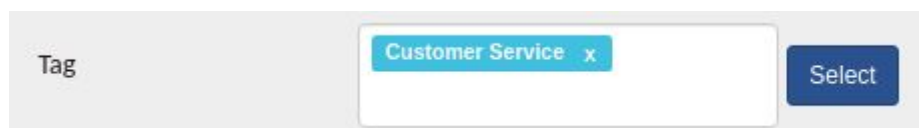


A search interface showing the results for the search "Customer Service". The input box is empty. Below the input box are two buttons: "Expand" and "Collapse", and a checkbox labeled "Group Select". Below these is a list of results, with "Customer Service" highlighted in red text. To the right of the list, a tag "Customer Service" is displayed with a clear button (x).

Note: To delete a Tag from the selection simply click the “X,” , to the right of the tag name.

19. Once the desired Tag selections have been selected, they can be viewed to the right

of the tag list box click the save button, , the “Tag” input box with an example selection is shown below:



The image shows a 'Tag' input box with the text 'Customer Service' and a small 'x' icon to its right. To the right of the input box is a blue 'Select' button.

20. Click the “Support Email” type the desired support email. An example is shown below:

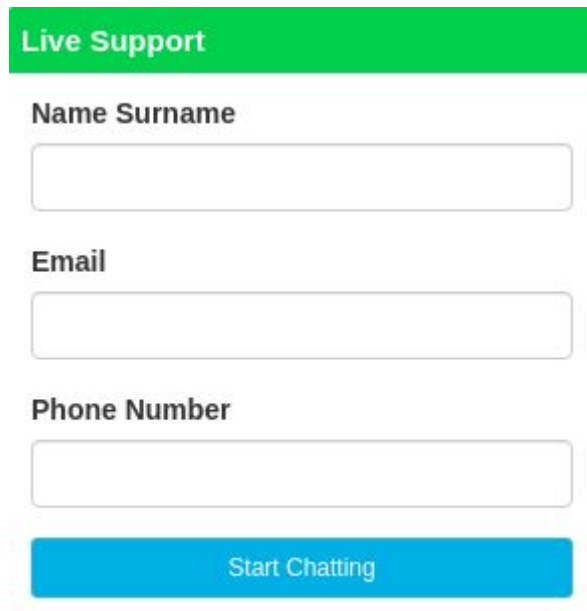


The image shows a 'Support E-Mail' input field with the text 'johnsmith@johnscallcenter.com' entered.

21. Following the Support Email input box, there are three checkbox selections outlined below to select the desired checkboxes:

<p>Email Optional <input type="checkbox"/></p>	<p>Makes the email input field optional when a customer starts a chat (See example below).</p>
<p>Phone Optional <input type="checkbox"/></p>	<p>Makes the phone number input field optional when a customer starts a chat (See example below).</p>
<p>Show Ended Chats on the Agent Screen. <input type="checkbox"/></p>	<p>Shows the ended chat on the agent screen.</p>

Below is an example chat window: If the “Email Optional” and “Phone Optional” checkboxes are left unchecked, the visitor of the website will have to input this data before starting the chat:

A screenshot of a chat widget form. It has a green header bar with the text "Live Support". Below the header are three input fields: "Name Surname", "Email", and "Phone Number". At the bottom is a blue button labeled "Start Chatting".

Live Support

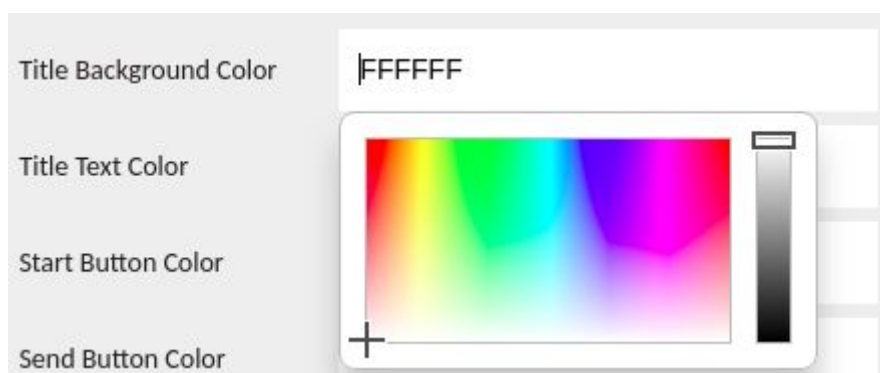
Name Surname

Email

Phone Number

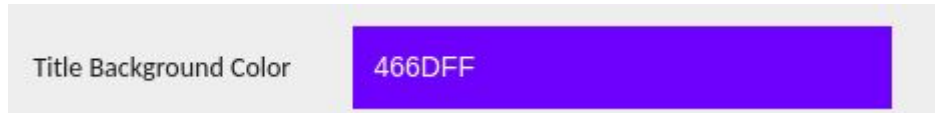
Start Chatting

22. Click the “Title Background Color” input box. A color palette will appear, as shown below:



Note: the default color code is “FFFFFF” representing the color white. All colors within the palette have unique color codes so they can be duplicated.

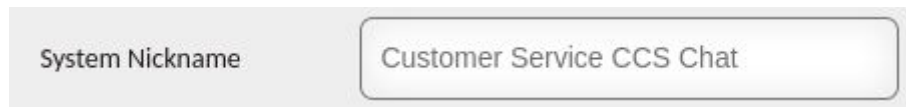
23. Select the desired custom color an example selection is shown below:



24. Click the “Title Text Color” input box, repeat steps 20 -21.
25. Click the “Start button Color” input box, repeat steps 20-21.
26. Click the “Send button Color” input box, repeat steps 20-21.
27. Click the “Logout button Color” input box, repeat steps 20-21, an example is shown below once all of the custom color selections have been completed:

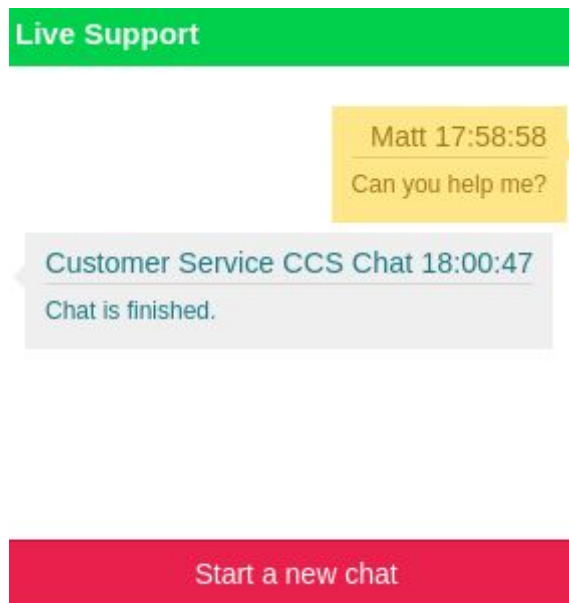


28. Click the “System Nickname” Input box, if desired, type a system nickname the example is shown below:



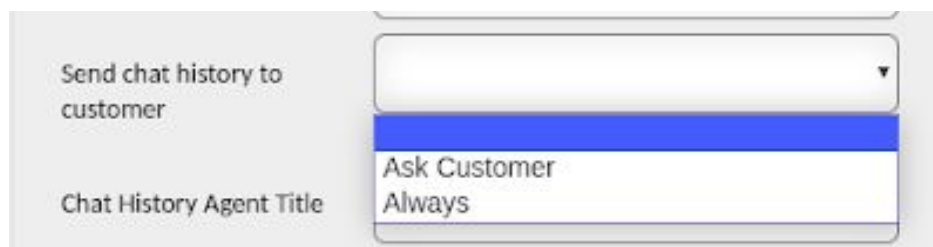
A screenshot of a chat widget configuration interface. It shows a label "System Nickname" next to a text input box containing the text "Customer Service CCS Chat".

The system nickname is shown at the top of each message sent an example is shown below:



A screenshot of a chat widget interface. At the top is a green bar with the text "Live Support". Below it is a yellow message bubble from "Matt 17:58:58" with the text "Can you help me?". Below that is a grey message bubble from "Customer Service CCS Chat 18:00:47" with the text "Chat is finished.". At the bottom is a red button with the text "Start a new chat".

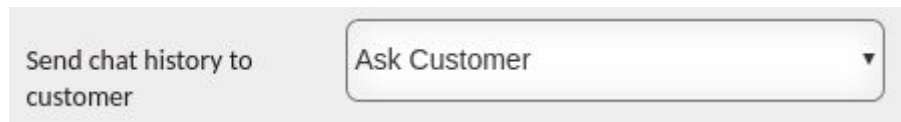
29. Click the “Send Chat History to Customer” input box, a dropdown list will appear with the following two options:



A screenshot of a chat widget configuration interface. It shows a label "Send chat history to customer" next to a dropdown menu. The dropdown menu is open, showing two options: "Ask Customer" and "Always". Below the dropdown is a label "Chat History Agent Title".

Note: the selection can also be left blank.


30. Select the desired option; an example selection is shown below:

A screenshot of a user interface element. On the left, the text "Send chat history to customer" is displayed. To its right is a dropdown menu with a light gray background and a thin border. The menu is currently open, showing the selected option "Ask Customer" in a dark font, with a small downward-pointing triangle on the right side of the text.

31. Click “Chat History Agent Title”, type a title an example is shown below:

A screenshot of a user interface element. On the left, the text "Chat History Agent Title" is displayed. To its right is a text input field with a light gray background and a thin border. The field contains the text "Agent" in a dark font.

Note: This screenshot has been taken from the Chat Record in the Quality Control using the Chat History Tab, The “Chat History Agent Title” can be found in between the agent’s name and the chat date as shown below:

A screenshot of a chat record entry. It features a light gray background with a thin border. At the top, the text "John Smith - Queue - 2020-07-07 19:35:44" is displayed in a teal font. Below this text is a horizontal line. Under the line, the text "How can I help you?" is displayed in a teal font.

32. Click the “Widget Versions” input box, a dropdown list of created widget versions will be displayed along with a customize option an example dropdown selection is shown below:

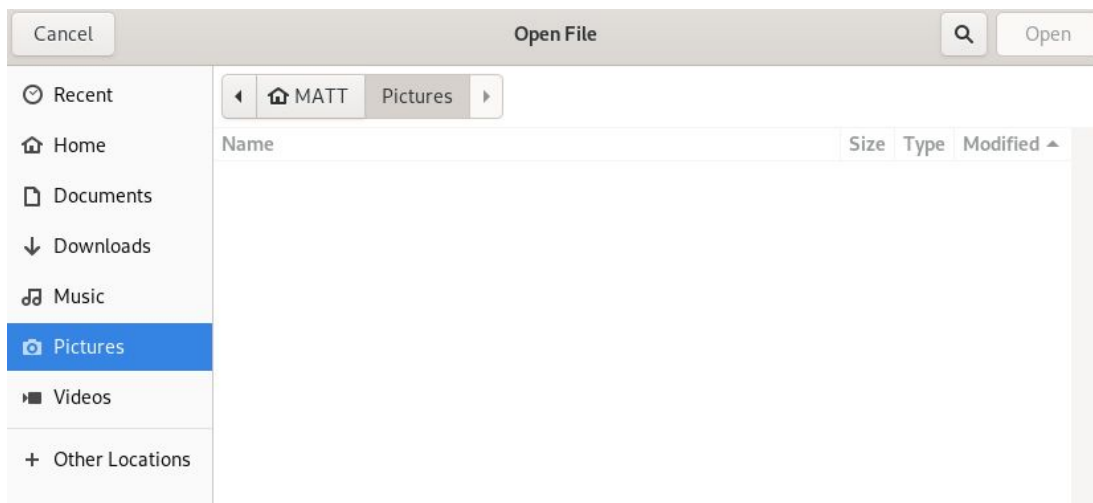


Version 1	Shows the chat window on the customer’s screen with square corners. (Used for webchat aka CCS Chat)
Version 2	Shows the chat window on the customer’s screen with rounded corners. (Used for webchat aka CCS Chat)
Customize	Shows the chat window on the customer’s screen with rounded corners, and a custom logo can be added to the chat window as well. (Used for webchat aka CCS Chat)

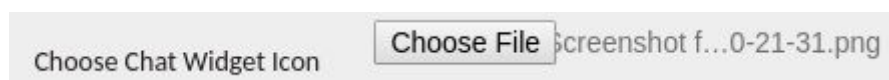
33. Select the desired widget version an example selection is shown below:



34. To the left of the title “Chose Chat Widget Icon,” (Used exclusively for creating an icon for the webchat (aka CCS Chat) files can be uploaded in .png, .jpeg, .jpg) click the choose file button, **Choose File**, to create a custom chat icon from saved photos on the device. A pop-up window will appear showing the saved files as shown below:



35. If a custom icon is desired, navigate to the appropriate saved location, and select the appropriate image. Once selected, the pop-up window will show the saved image. An example is shown below:






36. Next to the “Auto Finish” checkbox, check auto finish if desired to auto finish the chat, the checked “Auto Finish” checkbox is shown below:



37. In the “Auto Finish Duration” input box type the desired time frame for the chat to auto finish (only can be used if the “Auto Finish” checkbox is checked) an example time frame is shown below:



38. Click the “Action Type After Parking” input box a dropbox will appear. Select, if desired, the appropriate action after parking. The three actions are described below:

	<p>When parking is pressed by the agent, the customer will be transferred to the queue.</p>
	<p>When parking is pressed, the customer will be placed on hold. Agents can answer other chats, but when the customer responds, the same agent will receive the chat.</p>
	<p>When parking is pressed, the customer will be transferred to the ICR assigned to the chat widget.</p>

Note: Parking is used by the agent to transfer the customer to the queue, put the customer on hold, or transfer the agent to an IVR as described above. The agent must know what parking means for each chat widget.

39. In the “First Welcoming Message” input box, type a first welcoming message for the chat if desired an example is shown below:

First Welcoming Message	<div>Hello, Thank you for using our chat system.</div>
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40. In the “Welcoming Message” input box, type a welcoming message for the chat if desired an example is shown below:

Welcoming Message	<div>How can I help you today? </div>
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41. In the “Closing Message” input box, type a closing message for the chat if desired an example is shown below:

Closing Message	<div>Have a nice day!</div>
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42. In the “Agent left Message” input box, type an Agent Left message for the chat if desired an example is shown below:

Agent Left Message	<div>The agent has left the chat. A new agent will join shortly.</div>
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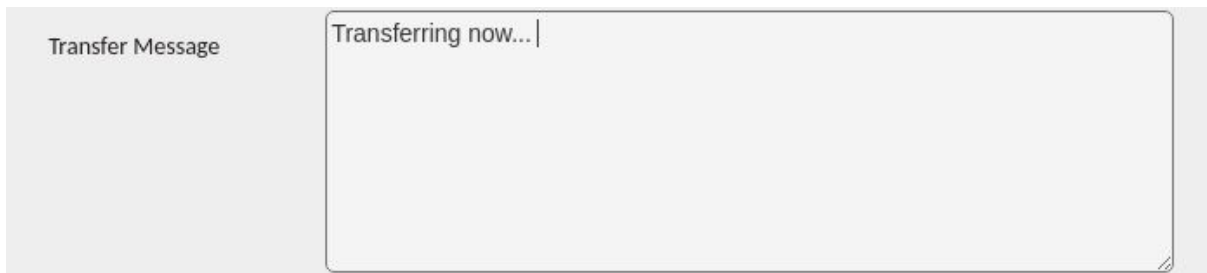
43. In the “Queue Message” input box, type a queue message for the chat if desired an example is shown below:

Queue Message	<div>A customer service agent will be with you shortly.</div>
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44. In the “Auto Finish Message” input box, type an auto finish message for the chat if desired an example is shown below:

Auto Finish Message	<div>Goodbye!</div>
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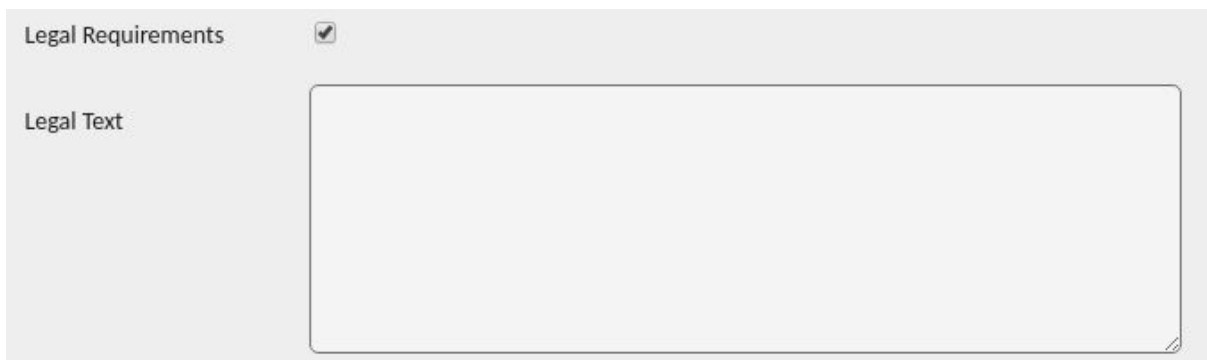
45. In the “Transfer Message” input box, type a transfer message for the chat if desired an example is shown below:

A screenshot of a web interface showing a label 'Transfer Message' on the left and a large text input box on the right. The input box contains the text 'Transferring now...' followed by a cursor.

46. In the “Auto Finish Duration” input box, type a time duration for the chat to Auto Finish if desired an example is shown below:

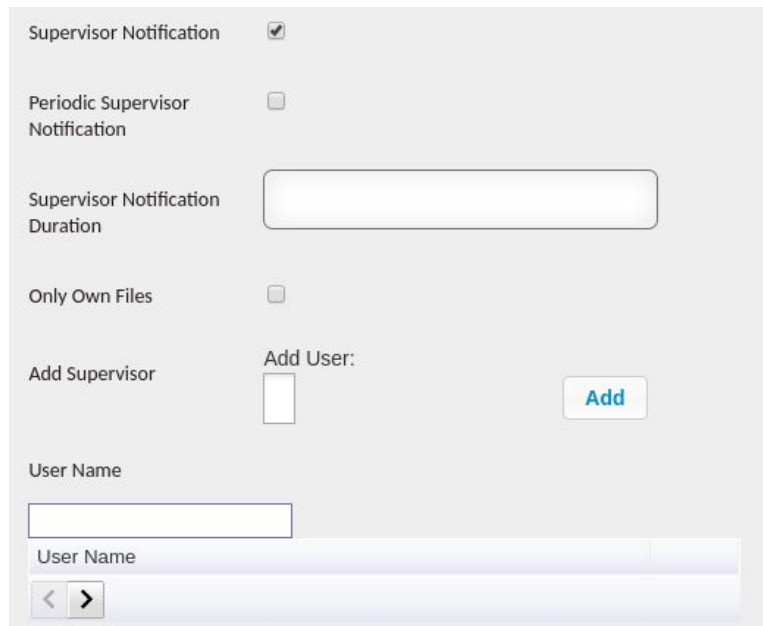
A screenshot of a web interface showing a label 'Auto Finish Message Duration' on the left and a text input box on the right. The input box contains the number '180'.

47. If a legal message is desired in the chat check the checkbox entitled “Legal Requirements,” when the box is checked the following “Legal Text” input box will be displayed:

A screenshot of a web interface showing a label 'Legal Requirements' with a checked checkbox. Below it, a label 'Legal Text' is followed by a large text input box.

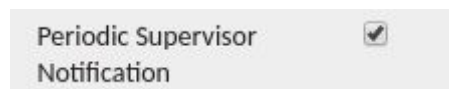
48. If desired in the “Legal Text” input box type the desired legal text.

49. If supervisor notifications are desired for the chat, check the checkbox entitled “Supervisor Notification,” when the box is checked the following will be displayed:



The screenshot shows a settings panel for supervisor notifications. It includes a checked checkbox for "Supervisor Notification", an unchecked checkbox for "Periodic Supervisor Notification", a text input field for "Supervisor Notification Duration", an unchecked checkbox for "Only Own Files", and an "Add Supervisor" section with an "Add User:" label, a small input field, and an "Add" button. At the bottom, there is a "User Name" label and a list box with a scroll bar.

50. If periodic supervisor notification is desired, check the “Periodic Supervisor Notification” checkbox as displayed below (When selected if an agent does not respond within the Supervisor Notification Duration to a customer’s chat, the supervisor will receive a notification):



The screenshot shows a single checkbox labeled "Periodic Supervisor Notification" which is checked.

51. Click the “Supervisor Notification Duration” input box, type the desired supervisor notification duration an example is displayed below:

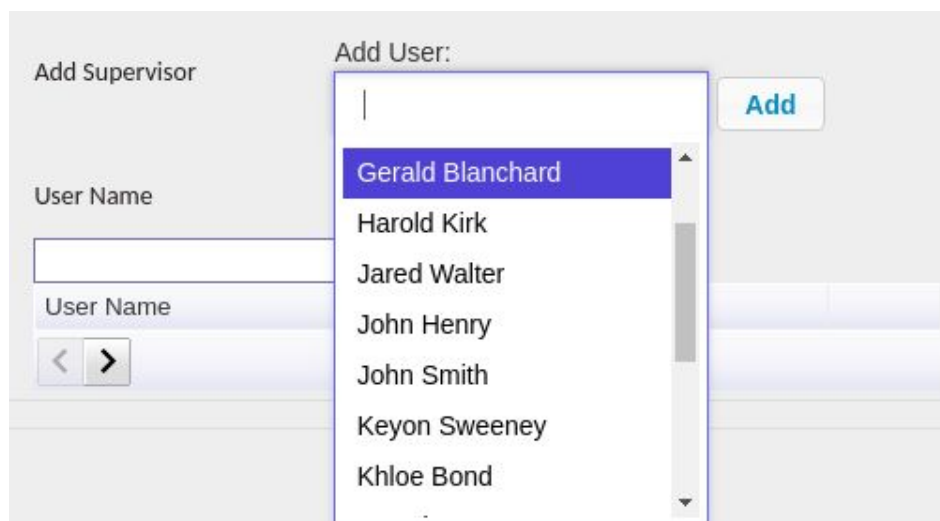



The screenshot shows the "Supervisor Notification Duration" label next to a text input box containing the value "180".

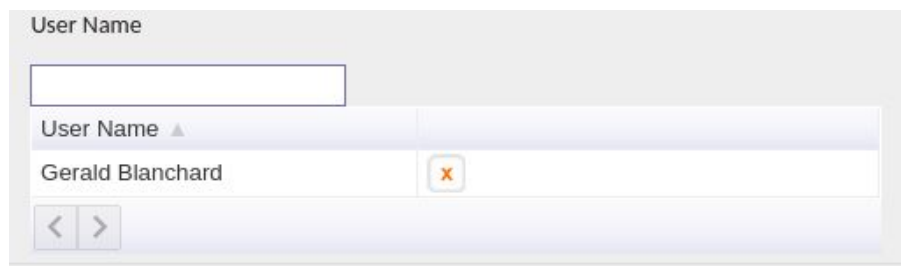
52. Check the “Only Own Files” checkbox. An example is shown below (When selected agents cannot upload files from their desktop to send to a customer, they can only use the template messages created in the tenant with attachments):





53. Click the “Add Supervisor” input box and start typing the name of the supervisor. A dropdown list will appear to facilitate in choosing a supervisor as shown below:

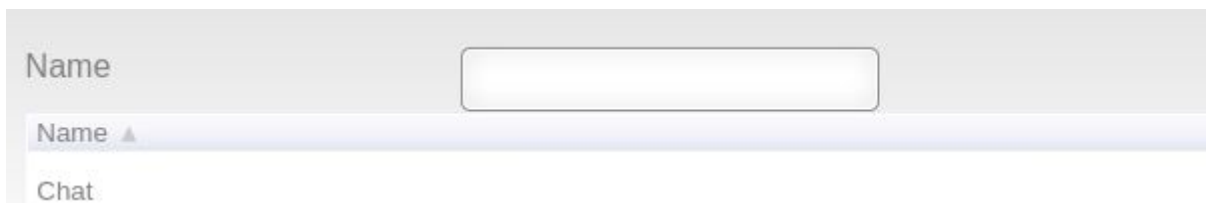


54. Select the desired Supervisor and click the add button, .
55. The supervisor’s name will appear in the “User Name” field an image of this field is shown below:




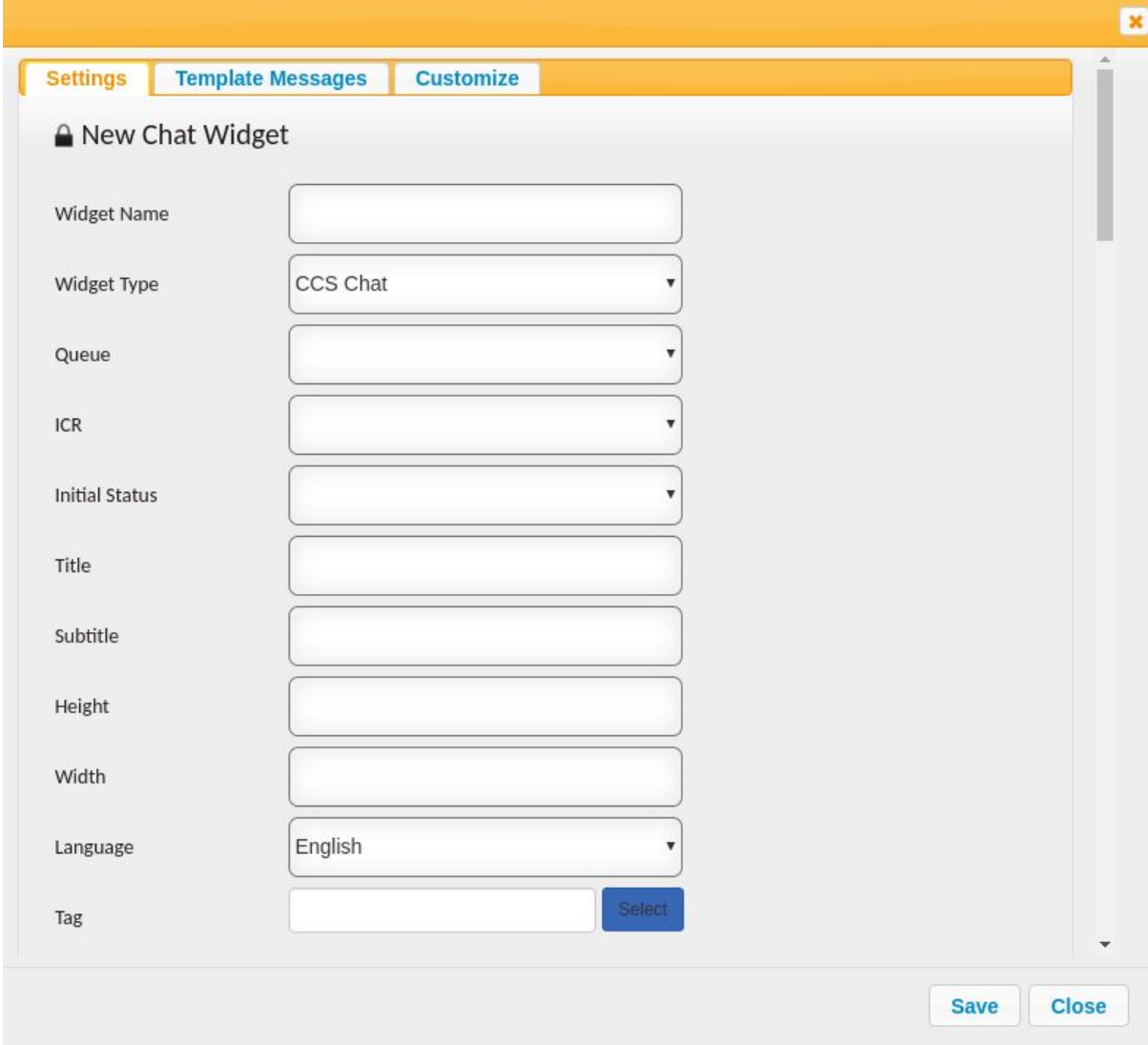
Note: To delete a supervisor, click the delete button,  , located to the right of the supervisor's name.

56. If Template Messages or customized messages are desired (See the Template Messages and Customize Sections) otherwise click the save button,  , the created CCS chat can be viewed in the chat widget name list as shown below:

A screenshot of a web interface for managing chat widgets. It features a table with two columns: "Name" and "Chat". The "Name" column has a dropdown menu currently showing "Name ▲". The "Chat" column is empty. There is a text input field above the table, likely for filtering or searching.

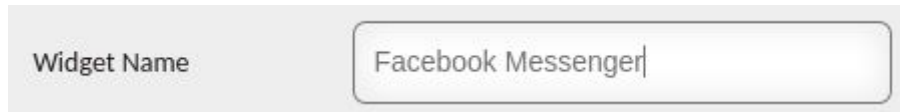
Creating a Facebook Messenger Chat Widget (Settings Tab)

1. Click the “New” button, , located in the top right corner of the Chat Widget screen, the following pop-up screen will appear as shown below:

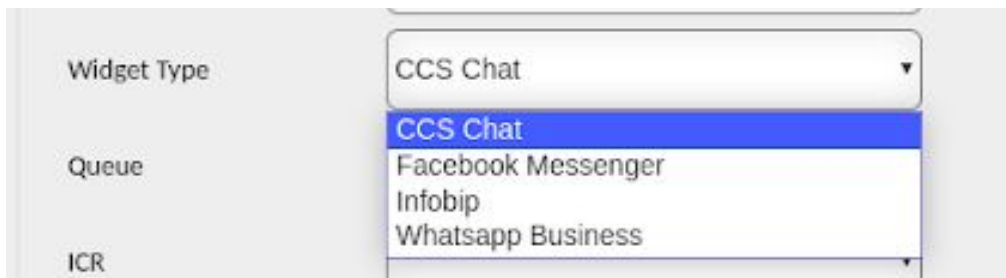


Note: All the input boxes are not shown in this photo; the user has to use the scroll bar on the right-hand side of the input box to view the additional input boxes.

2. Click the “Widget Name” input box, type the desired name an example is shown below:

A screenshot of a form field labeled "Widget Name". The input box contains the text "Facebook Messenger".

3. Click the “Widget Type” input box. A dropdown menu will appear an example is shown below:

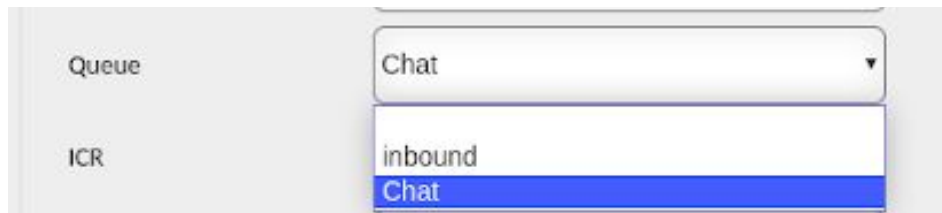
A screenshot of a form field labeled "Widget Type". A dropdown menu is open, showing a list of options: "CCS Chat", "Facebook Messenger", "Infobip", and "Whatsapp Business". The "CCS Chat" option is currently selected and highlighted in blue.

4. Select the “Facebook Messenger” Chat widget from the dropdown list an example selection is shown below:

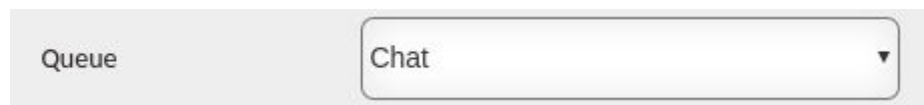
A screenshot of a form field labeled "Widget Type". The dropdown menu is closed, and the text "Facebook Messenger" is displayed in the input box.

5. Click the “Verify Token” input box, type the verify token (can be any parameter desired, such as a password, company, etc. It will be used on the Facebook developer screen).
6. Click the “Page Access Token” input box, type the page access token. This token is generated automatically by Facebook. It is obtained by selecting the appropriate pages on Call Center Studio and on Facebook desired to be linked together.

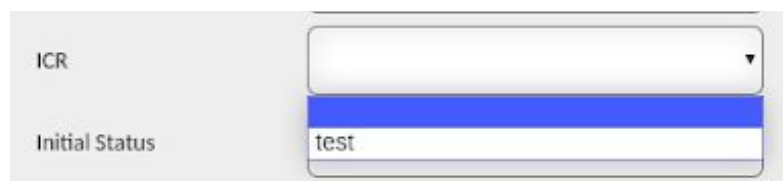
- Click the “Queue” input box, a dropdown menu will appear with available queue selections (See Queue Section to enable chat on a queue) an example is shown below:



- Select the desired queue from the dropdown list an example selection is shown below:

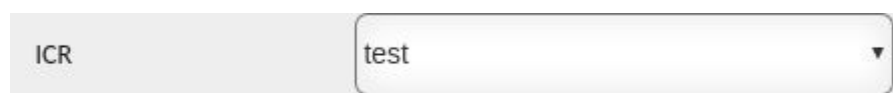


- Select the “ICR” input box, a dropdown menu will appear with ICR selections (See the ICR section for more details) an example is shown below:



Note: Interactive Chat Response brings an IVR tree to a chat platform. It can be used in all chat channels, webchat, Facebook, WhatsApp, etc. It enables customers to self select their queues, make requests, etc.

- Select an ICR from the dropdown list if desired an example selection is shown below:

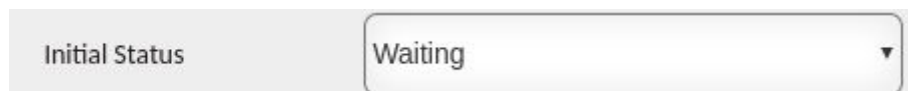


11. Click the “Initial Status” input box a dropdown menu will appear an example is shown below:

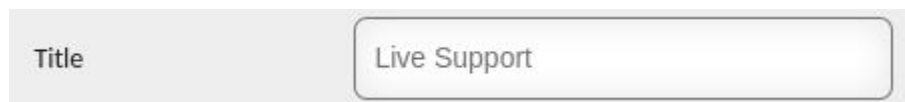
A screenshot of a form with two labels: 'Initial Status' and 'Title'. The 'Initial Status' label is positioned above a dropdown menu that is open, showing a list of options. The first option, 'Waiting', is highlighted with a blue background. The 'Title' label is positioned below the 'Initial Status' label.

Note: This selection can only be used when an ICR is not used. This status is used for reporting to show the initial status as “waiting,” “blank,” or “ICR Status.”

12. Select the desired initial status or none at all from the dropdown selection, an example selection is shown below:

A screenshot of a form with two labels: 'Initial Status' and 'Title'. The 'Initial Status' label is positioned above a dropdown menu that is closed, showing the selected value 'Waiting'. The 'Title' label is positioned below the 'Initial Status' label.

13. Click the “Title” input box, type a name for the Chat (Customer will be able to see) an example is shown below:

A screenshot of a form with two labels: 'Title' and 'Subtitle'. The 'Title' label is positioned above a text input box that contains the text 'Live Support'. The 'Subtitle' label is positioned below the 'Title' label.

14. Click the “Subtitle” input box, type a name for the subtitle of the chat (Customer will be able to see) an example is shown below:

A screenshot of a form with two labels: 'Subtitle' and 'Height'. The 'Subtitle' label is positioned above a text input box that contains the text 'Live Support'. The 'Height' label is positioned below the 'Subtitle' label.

15. Click the “Height” input box type the desired height (Pixels) of the chat window. An example is shown below:

A screenshot of a form with two labels: 'Height' and 'Initial Status'. The 'Height' label is positioned above a text input box that contains the text '300'. The 'Initial Status' label is positioned below the 'Height' label.

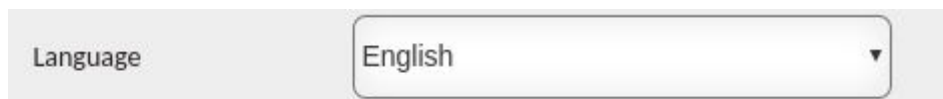
-
16. Click the “Width” input box type the desired width (Pixels) of the chat window. An example is shown below:


A screenshot of a configuration interface. On the left, the label "Width" is displayed in a light gray box. To its right is a white input field with a thin gray border, containing the number "300".

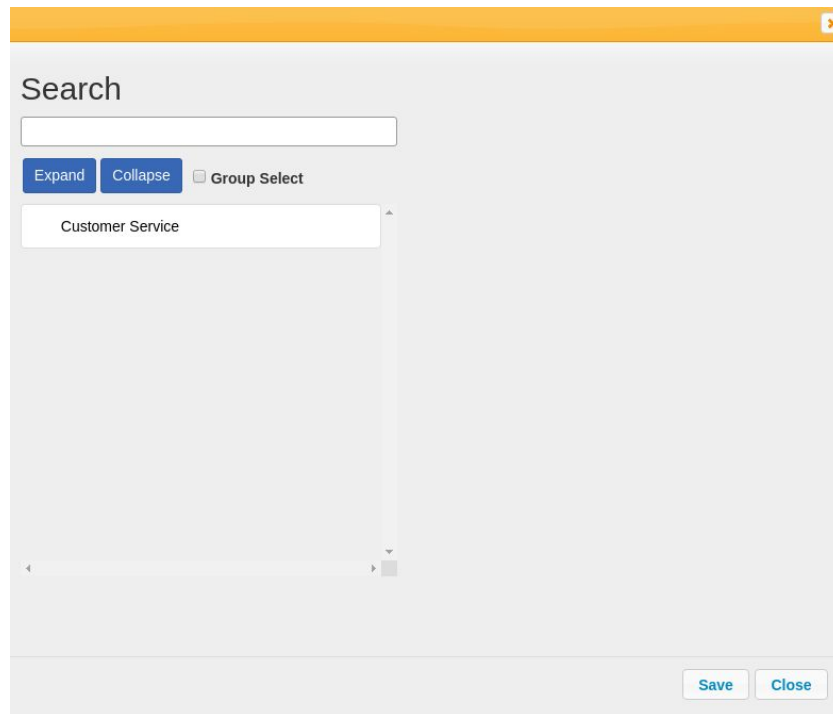
17. Click the “Language” input box, a dropdown list of added languages to the tenant will appear in the following example Turkish, and English were added to the tenant as shown below (Other languages can be added by contacting the Call Center Studio Project Manager):

A screenshot of a configuration interface. On the left, the label "Language" is displayed in a light gray box. To its right is a dropdown menu. The menu is open, showing a list of options: "English" (highlighted in blue), "English", and "Turkish". Below the "Language" label, the label "Tag" is also visible.

18. Select the desired language from the dropdown list. An example is shown below:

A screenshot of a configuration interface. On the left, the label "Language" is displayed in a light gray box. To its right is a dropdown menu with "English" selected and a downward arrow on the right side of the box.

19. If desired tags can be added, click the Select button,  to the right of the “Tag” input box, the following pop-up window will appear:

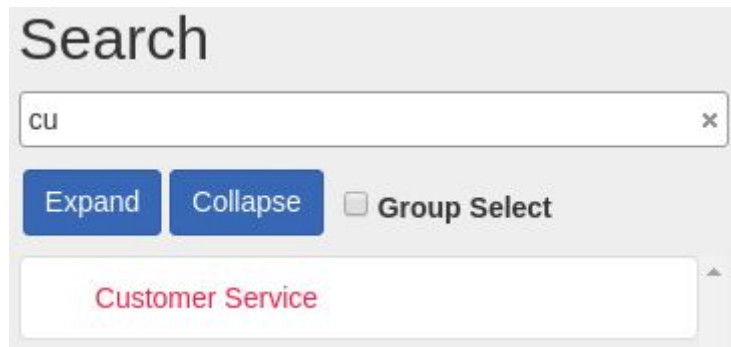


*Note: Only Tags that were made available for the chat can be viewed here (See **Tag** Section)*


20. Search for a Tag using the “Search” input box shown below:


A screenshot of a search input box. The word "Search" is displayed in a large, bold font above a text input field.

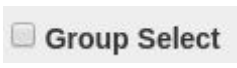
Note: Partial Tag names can be used for searching purposes all Tags with the partial name will have their name appear in red font as shown below:



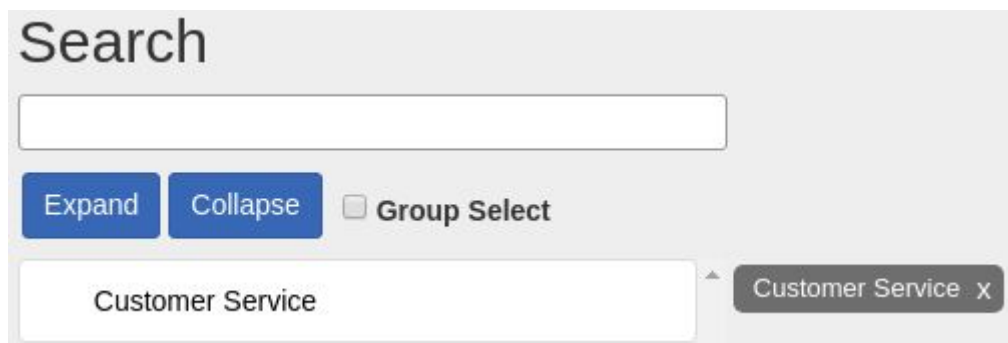
Note:


Press the Expand button, , to expand the selection (Used for child tags)

Press the Collapse button, , to collapse the selection (Used for child tags)

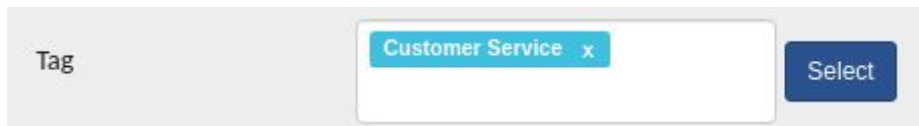
Check the Group Select Checkbox, , to group select tags

Once a Tag is selected in the pop-up window, it can be viewed to the right of the tag list box, as shown below:



Note: To delete a Tag from the selection simply click the “X,” , to the right of the tag name.

21. Once the desired Tag selections have been selected, they can be viewed to the right of the tag list box. Click the save button, **Save**. The “Tag” input box with an example selection is shown below:



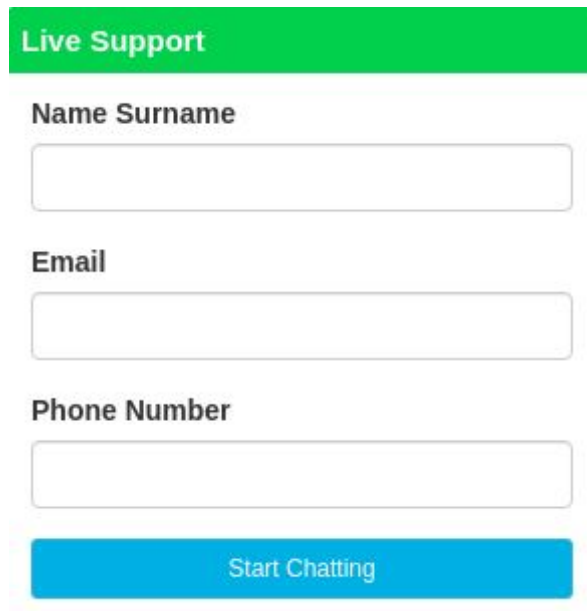
22. Click the “Support Email” type the desired support email. An example is shown below:



23. Following the Support Email input box, there are three checkbox selections outlined below select the desired checkboxes:

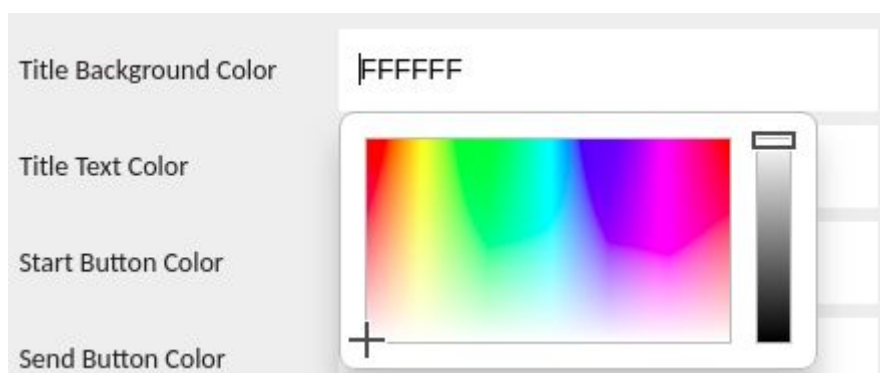
<p>Email Optional <input type="checkbox"/></p>	<p>Makes the email input field optional when a customer starts a chat (See example below).</p>
<p>Phone Optional <input type="checkbox"/></p>	<p>Makes the phone number input field optional when a customer starts a chat (See example below).</p>
<p>Show Ended Chats on the Agent Screen. <input type="checkbox"/></p>	<p>Shows the ended chat on the agent screen.</p>

Below is an example chat window: If the “Email Optional” and “Phone Optional” checkboxes are left unchecked, the visitor of the website will have to input this data before starting the chat:



The image shows a chat widget interface. At the top is a green header bar with the text "Live Support" in white. Below the header are three input fields: "Name Surname", "Email", and "Phone Number". Each field is a simple white rectangle with a thin grey border. At the bottom of the form is a blue button with the text "Start Chatting" in white.

24. Click the “Title Background Color” input box. A color palette will appear, as shown below:



Note: the default color code is “FFFFFF” representing the color white. All colors within the palette have unique color codes so they can be duplicated.

25. Select the desired custom color an example selection is shown below:

Title Background Color	<input type="text" value="466DFF"/>
------------------------	-------------------------------------

26. Click the “Title Text Color” input box, repeat steps 20 -21.

27. Click the “Start button Color” input box, repeat steps 20-21.

28. Click the “Send button Color” input box, repeat steps 20-21.

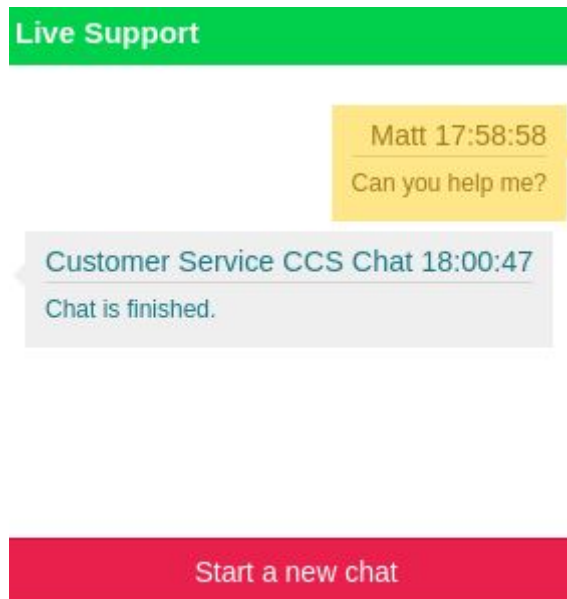
29. Click the “Logout button Color” input box, repeat steps 20-21, an example is shown below once all of the custom color selections have been completed:

Title Background Color	<input type="text" value="466DFF"/>
Title Text Color	<input type="text" value="67FF98"/>
Start Button Color	<input type="text" value="FF4365"/>
Send Button Color	<input type="text" value="FFF365"/>
Logout Button Color	<input type="text" value="000000"/>

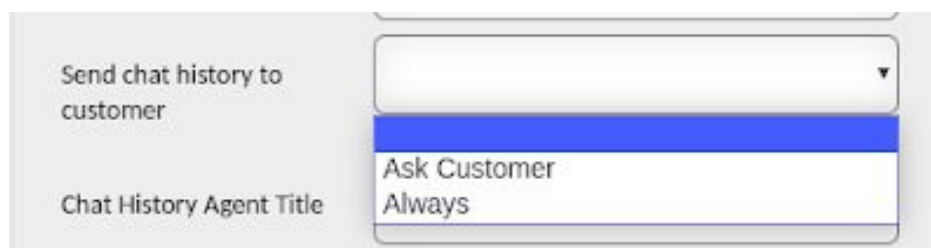
30. Click the “System Nickname” input box, if desired, type a system nickname the example is shown below:

System Nickname	<input type="text" value="Customer Service CCS Chat"/>
-----------------	--

The system nickname is shown at the top of each message sent an example is shown below:

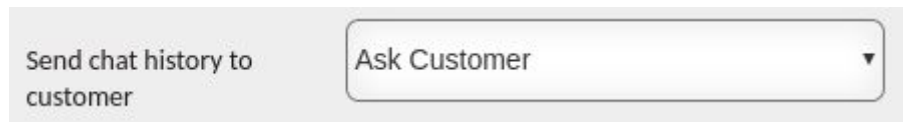


31. Click the “Send Chat History to Customer” input box, a dropdown list will appear with the following two options:



Note: the selection can also be left blank

32. Select the desired option, an example selection is shown below:



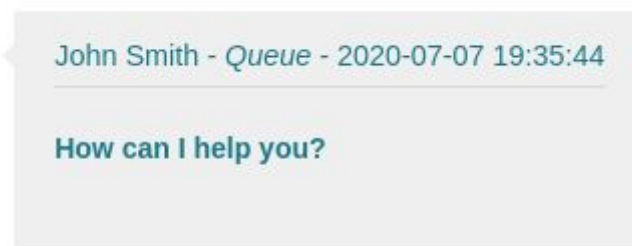
A screenshot of a user interface element. On the left, the text "Send chat history to customer" is displayed. To its right is a dropdown menu with a white background and a thin grey border. The menu is currently open, showing the selected option "Ask Customer" in a dark grey font. A small downward-pointing triangle is visible on the right side of the dropdown box.

33. Click “Chat History Agent Title”, type a title an example is shown below:



A screenshot of a user interface element. On the left, the text "Chat History Agent Title" is displayed. To its right is a text input field with a white background and a thin grey border. The field contains the text "Agent" in a dark grey font.

Note: This screenshot has been taken from the Chat Record in Quality Control using the Chat History Tab, The “Chat History Agent Title” can be found in between the agent’s name and the chat date as shown below:



34. Click the “Widget Versions” input box, a dropdown list of created widget versions will be displayed along with a customize option an example dropdown selection is shown below:



A screenshot of a user interface element. On the left, the text "Widget Versions" is displayed. To its right is a dropdown menu with a white background and a thin grey border. The menu is currently open, showing a list of options: "Version 1", "Version 1", "Version 2", and "Customize". The first "Version 1" option is highlighted with a blue background. A small downward-pointing triangle is visible on the right side of the dropdown box.

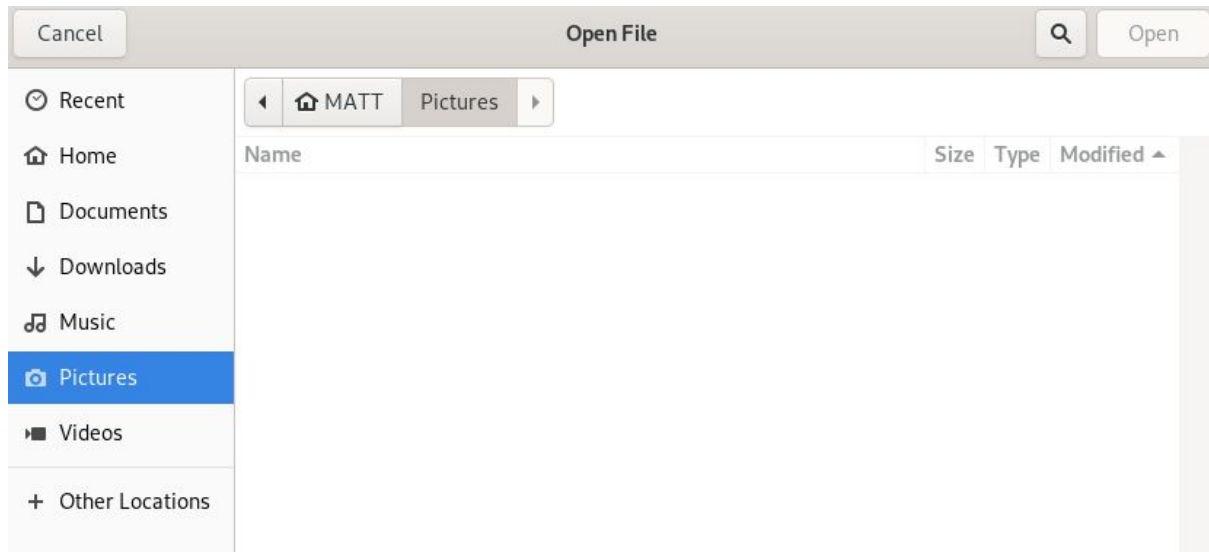
35. Select the desired widget version an example selection is shown below:



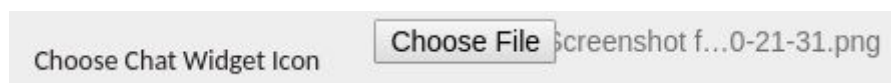
A screenshot of a user interface element. On the left, the text "Widget Versions" is displayed. To its right is a dropdown menu with a white background and a thin grey border. The menu is currently closed, showing the selected option "Version 1" in a dark grey font. A small downward-pointing triangle is visible on the right side of the dropdown box.

36. To the left of the title “Chose Chat Widget Icon,” click the choose file button,

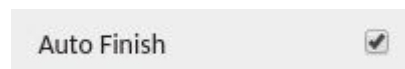
Choose File, to create a custom chat icon from saved photos on the device used. A pop-up window will appear showing the saved files as shown below:



37. If a custom icon is desired, navigate to the appropriate saved location, and select the appropriate image. Once selected, the pop-up window will show the saved image. An example is shown below:




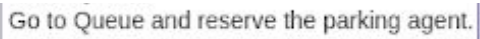

38. Check the “Auto Finish checkbox”, if desired (Ends the chat after no activity after the auto finish duration), the checked “Auto Finish” checkbox is shown below:



39. In the “Auto Finish Duration” input box, type the desired time frame for the chat to auto finish (only can be used if the Auto Finish checkbox is checked) an example time frame (seconds) is shown below:

A screenshot of a user interface element. On the left, the text "Auto Finish Duration" is displayed in a light gray box. To its right is a white input field with a thin gray border, containing the number "180".

40. Click the “Action Type After Parking” input box a dropbox will appear. Select, if desired, the appropriate action after parking. The three actions are described below:

	When parking is pressed by the agent, the customer will be transferred to the queue.
	When parking is pressed, the customer will be placed on hold, agents can answer other chats, but when the customer responds, the same agent will receive the chat.
	When parking is pressed, the customer will be transferred to the ICR assigned to the chat widget.

-
41. In the “First Welcoming Message” input box, type a first welcoming message for the chat if desired an example is shown below:

First Welcoming Message	<div>Hello, Thank you for using our chat system.</div>
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42. In the “Welcoming Message” input box, type a welcoming message for the chat if desired an example is shown below:

Welcoming Message	<div>How can I help you today? </div>
-------------------	---------------------------------------

43. In the “Closing Message” input box, type a closing message for the chat if desired an example is shown below:

Closing Message	<div>Have a nice day!</div>
-----------------	-----------------------------

44. In the “Agent left Message” input box, type an Agent Left message for the chat if desired an example is shown below:

Agent Left Message	The agent has left the chat. A new agent will join shortly.
--------------------	---

45. In the “Queue Message” input box, type a queue message for the chat, if desired. An example is shown below (Agent and customer will be able to view message once the customer is transferred to a queue):

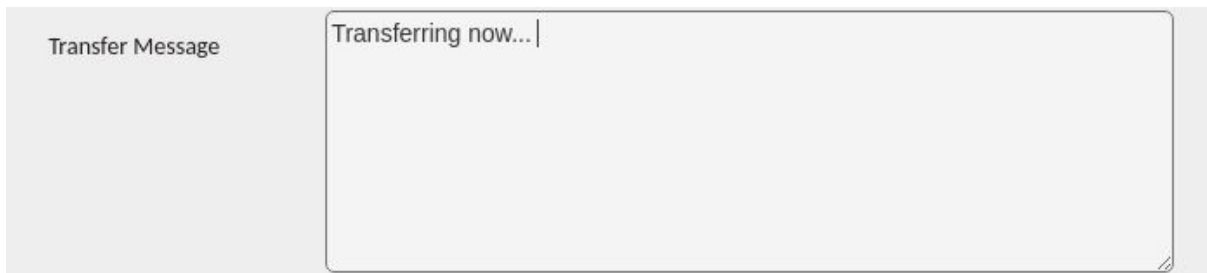
Queue Message	A customer service agent will be with you shortly.
---------------	--

46. In the “Auto Finish Message” input box, type an auto finish message for the chat, if desired. An example is shown below (this message will be displayed after no activity during the auto finish message duration):

Auto Finish Message	Goodbye!
---------------------	----------

47. In the “Transfer Message” input box, type a transfer message for the chat if desired.

An example is shown below:

A screenshot of a configuration panel for a chat widget. On the left, there is a label 'Transfer Message'. To its right is a large, empty text input box with a light gray border and a small cursor icon at the bottom right corner.

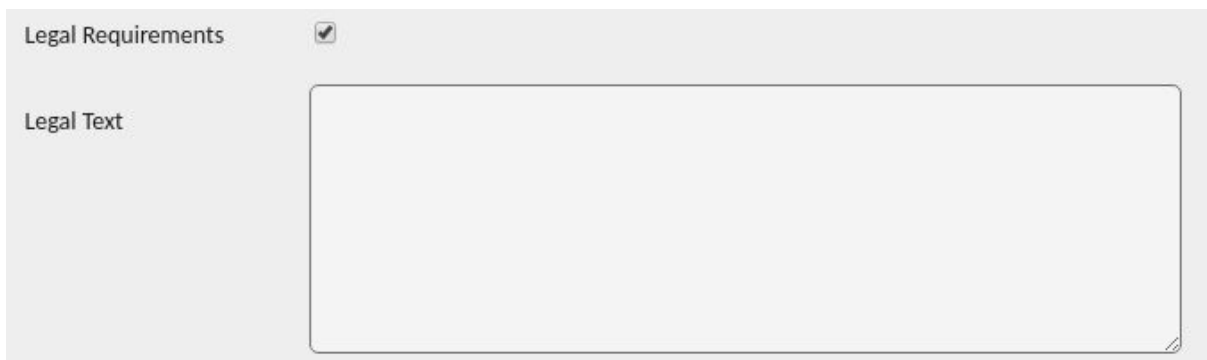
48. In the “Auto Finish Duration” input box, type a time duration (seconds) for the chat to

Auto Finish if desired an example is shown below:

A screenshot of a configuration panel for a chat widget. On the left, there is a label 'Auto Finish Message Duration'. To its right is a text input box containing the number '180'.

49. If a legal message is desired in the chat check the checkbox entitled “Legal

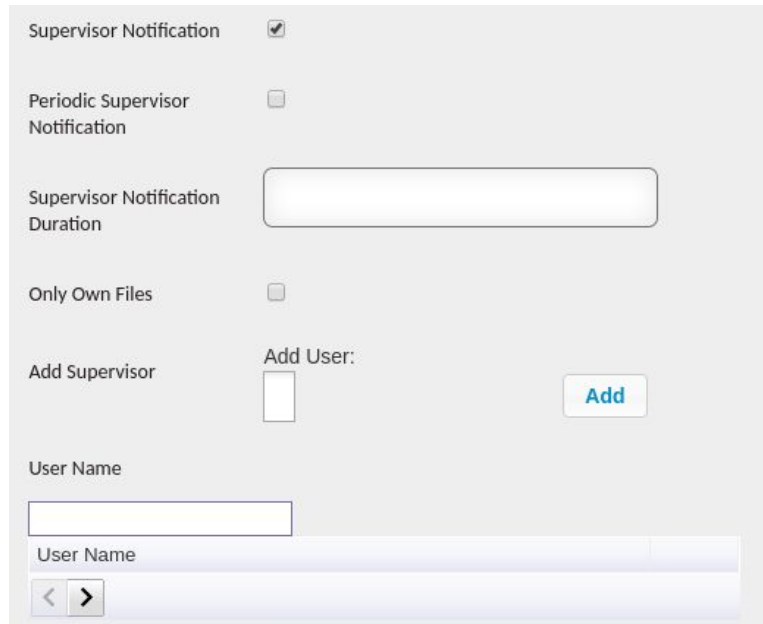
Requirements,” when the box is checked the following “Legal Text” input box will be displayed:

A screenshot of a configuration panel for a chat widget. On the left, there is a label 'Legal Requirements' next to a checked checkbox. Below this, there is a label 'Legal Text'. To the right of the 'Legal Text' label is a large, empty text input box with a light gray border and a small cursor icon at the bottom right corner.

50. If desired, in the “Legal Text” input box type the desired legal text.

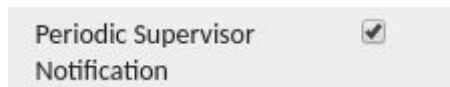
51. If supervisor notifications are desired for the chat check the checkbox entitled

“Supervisor Notification,” when the box is checked, the following will be displayed:




The screenshot shows a settings panel for 'Supervisor Notification'. It includes a checked checkbox for 'Supervisor Notification', an unchecked checkbox for 'Periodic Supervisor Notification', a text input field for 'Supervisor Notification Duration', an unchecked checkbox for 'Only Own Files', an 'Add Supervisor' section with an 'Add User:' label, a small input field, and an 'Add' button. At the bottom, there is a 'User Name' label, a text input field, and a list box with 'User Name' and navigation arrows.

52. If periodic supervisor notification is desired, check the “Periodic Supervisor Notification” checkbox as displayed below (When selected if an agent does not respond within the Supervisor Notification Duration to a customer’s chat, the supervisor will receive a notification):



The screenshot shows a single checkbox labeled 'Periodic Supervisor Notification' which is checked.

53. Click the “Supervisor Notification Duration” input box, type the desired supervisor notification duration (seconds) an example is displayed below:



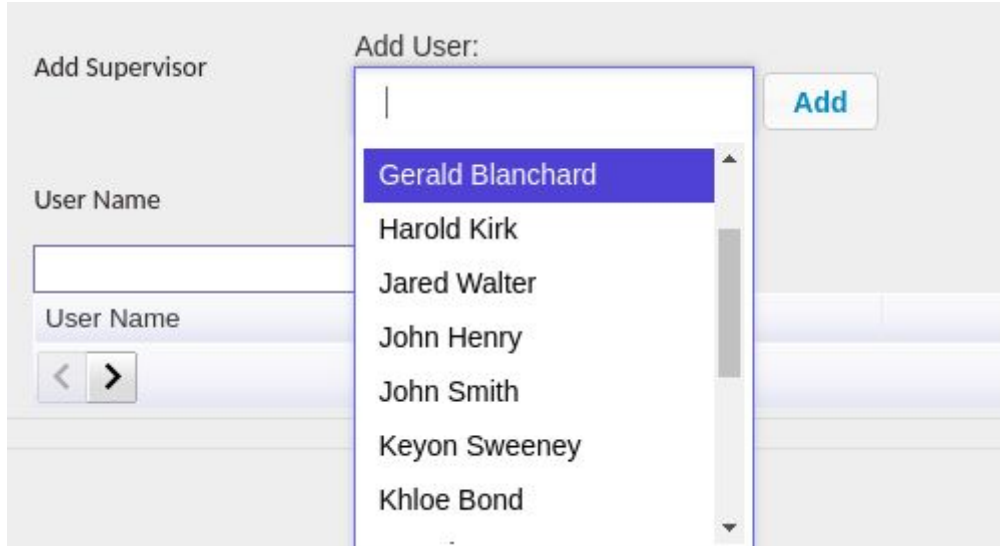
The image shows a form field labeled "Supervisor Notification Duration" with a text input box containing the value "180".

54. Check the “Only Own Files” checkbox. An example is shown below (When selected agents cannot upload files from their desktop to send to a customer, they can only use the template messages created in the tenant with attachments):




The image shows a checkbox labeled "Only Own Files" which is checked.

55. Click the “Add Supervisor” input box and start typing the name of the supervisor. A dropdown list will appear to facilitate in choosing a supervisor as shown below:




The image shows a form with a section titled "Add Supervisor". It includes a "User Name" input box and a dropdown list. The dropdown list is open, showing a list of names: Gerald Blanchard, Harold Kirk, Jared Walter, John Henry, John Smith, Keyon Sweeney, and Khloe Bond. The "Add" button is visible to the right of the dropdown.

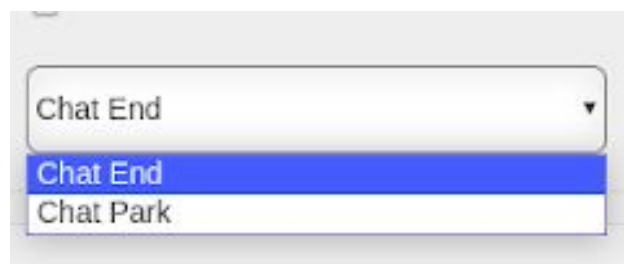
56. Select the desired Supervisor and click the add button, .

57. The supervisor's name will appear in the "User Name" field an image of this field is shown below:




Note: To delete a supervisor, click the delete button, , located to the right of the supervisor's name.

58. Click the "Finish Button Action Type" (The small close button in the upper right corner of the chat screen) input box. A dropdown list will appear with two selections described below choose the desired selection or none at all:




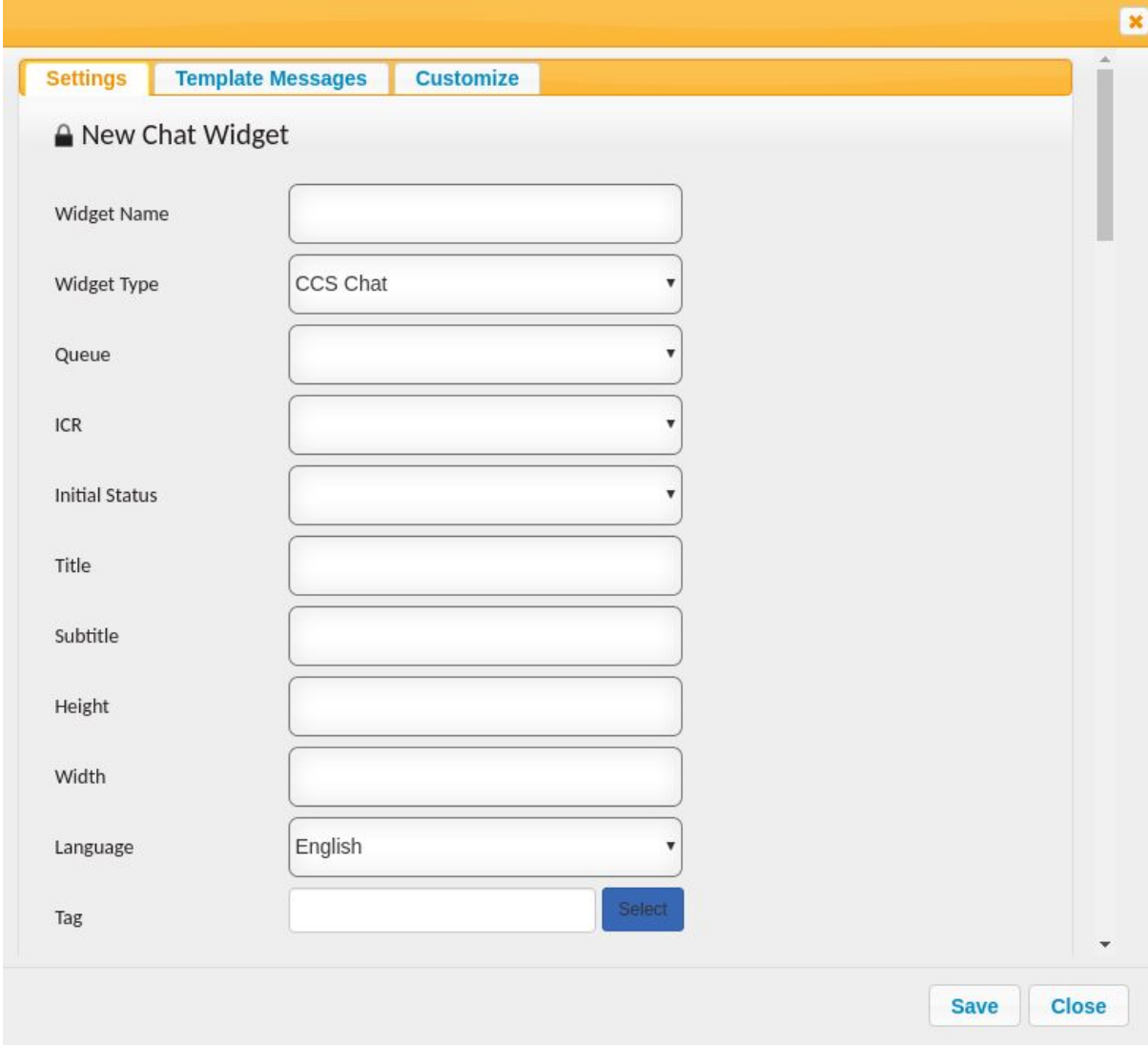
Chat End	Ends the chat.
Chat Park	Parks the chat. If the client's customer responds to the chat within 24 hours, the same agent can return to the chat and also review the prior conversation.

59. If Template Messages or customized messages are desired (See the Template Messages and Customize Sections) otherwise click the save button, , the created Facebook Messenger chat can be viewed in the chat widget name list as shown below:

A screenshot of a web interface showing a list of chat widget names. At the top, there is a header row with the label "Name" and an empty text input field. Below this is a table with a single row containing the text "Facebook Messenger". The table has a light blue header row with the label "Name" and a small upward-pointing triangle icon.

Creating an Infobip Widget (Settings Tab)

1. Click the New button, , located in the top right corner of the Chat Widget screen, the following pop-up screen will appear as shown below:



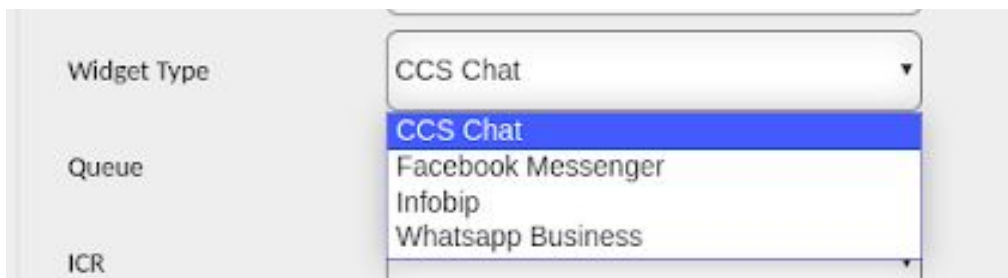
Note: All the input boxes are not shown in this photo; the user has to use the scroll bar on the right-hand side of the input box to view the additional input boxes.

2. Click the “Widget Name” input box, type the desired name an example is shown below:



Widget Name

3. Click the “Widget Type” input box. A dropdown menu will appear an example is shown below:



Widget Type

Queue

ICR

4. Select the “Infobip” widget type from the dropdown list an example selection is shown below:



Widget Type

5. Click the “WhatsApp Username” input box, type the WhatsApp (Infobip) username an example is shown below:




Whatsapp Username

6. Click the “WhatsApp Password” input box, type the WhatsApp (infobip) password an example is shown below:

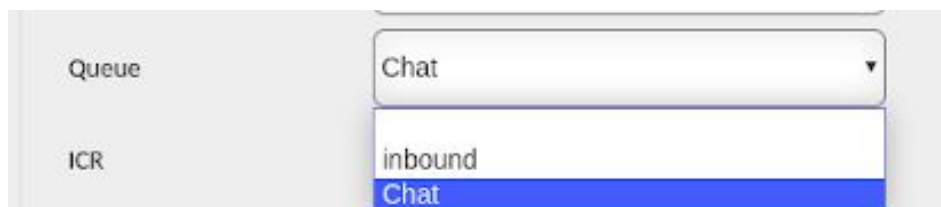


Whatsapp Password

7. After completing steps 5 and 6, a basic authorization token can be generated in the “Whatsapp Basic Authorization” input box by clicking the show button, .
8. After completing step 7, a WhatsApp authorization token can be generated in the “Whatsapp App Authorization” box. WhatsApp basic Authorization is password dependent, whereas WhatsApp App Authorization is not. For this reason, WhatsApp App authorization is preferred over basic authorization. This authorization code will then be used in the Infobip API.
9. Click the “WhatsApp Phone Number” input box, type the WhatsApp phone number.
The input box is shown below:

A screenshot of a form field. On the left, the text 'Whatsapp Phone Number' is displayed in a light gray font. To its right is a rectangular input box with a thin gray border and rounded corners.

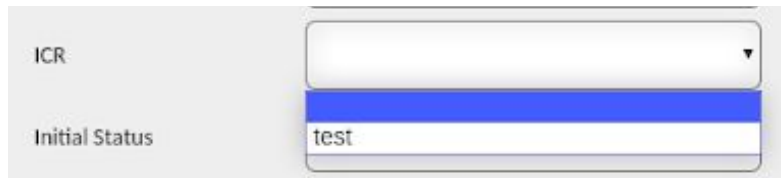
10. Click the “WhatsApp Scenario Key” input box, type the WhatsApp Scenario Key provided by the Infobip Company.
11. Click the “WhatsApp Base URL” input box, type the desired company Infobip URL given when the Infobip account was created for example SmithCo.api.infobip.com.
12. Click the “WhatsApp Account Key” input box, type the WhatsApp account key from the Infobip account.
13. Click the “Queue” input box, a dropdown menu will appear with available queue selections (See Queue Section to enable chat on a queue) an example is shown below:

A screenshot of a form field. On the left, the text 'Queue' is displayed in a light gray font. To its right is a dropdown menu. The dropdown is open, showing a list of options: 'Chat', 'inbound', and 'Chat'. The 'Chat' option at the bottom is highlighted with a blue background. To the left of the dropdown, the text 'ICR' is visible.

14. Select the desired queue from the dropdown list an example selection is shown below:

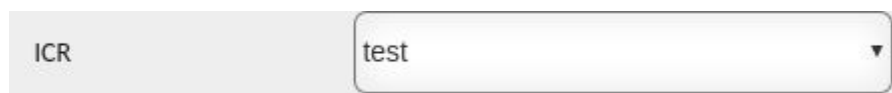
A screenshot of a user interface showing a label 'Queue' next to a dropdown menu. The dropdown menu is open, displaying the selected option 'Chat'.

15. Select the “ICR” input box, a dropdown menu will appear with ICR selections (See the ICR section for more details) an example is shown below:

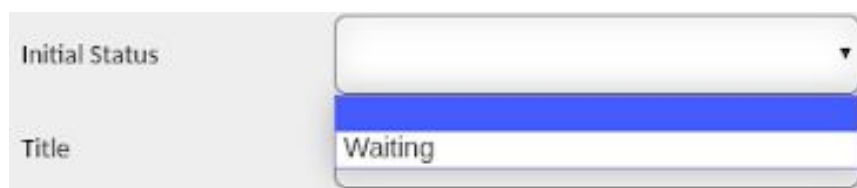
A screenshot of a user interface showing a label 'ICR' next to a dropdown menu. The dropdown menu is open, displaying the selected option 'test'. Below the dropdown menu, there is a label 'Initial Status'.

Note: Interactive Chat Response brings an IVR tree to a chat platform. It can be used in all chat channels, webchat, Facebook, WhatsApp, etc. It enables customers to self select their queues, make requests, etc.

16. Select an ICR from the dropdown list, if desired. An example selection is shown below:

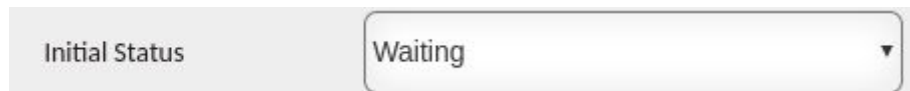
A screenshot of a user interface showing a label 'ICR' next to a dropdown menu. The dropdown menu is open, displaying the selected option 'test'.

17. Click the “Initial Status” input box a dropdown menu will appear an example is shown below:

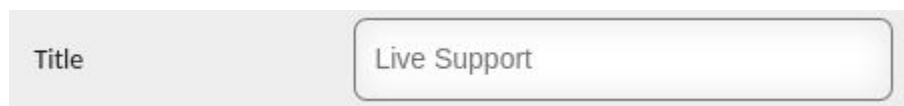
A screenshot of a user interface showing a label 'Initial Status' next to a dropdown menu. The dropdown menu is open, displaying the selected option 'Waiting'. Below the dropdown menu, there is a label 'Title'.

Note: This selection can only be used when an ICR is not used. This status is used for reporting to show the initial status as “waiting,” “blank,” or “ICR Status.”

18. Select the desired initial status or none at all from the dropdown selection, an example selection is shown below:

A screenshot of a form element. On the left is a light gray rectangular box with the text "Initial Status" in a dark gray font. To the right of this box is a white rectangular dropdown menu with a thin gray border. Inside the dropdown, the word "Waiting" is displayed in a dark gray font. A small dark gray downward-pointing triangle is located at the right end of the dropdown menu.


19. Click the “Title” input box, type a name for the chat (customer will be able to see) an example is shown below:

A screenshot of a form element. On the left is a light gray rectangular box with the text "Title" in a dark gray font. To the right of this box is a white rectangular input field with a thin gray border. Inside the input field, the words "Live Support" are typed in a dark gray font.

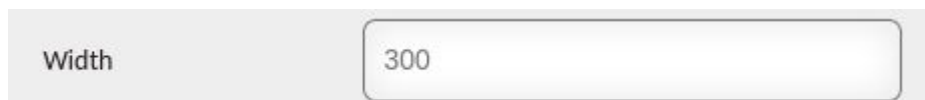
20. Click the “Subtitle” input box, type a name for the subtitle of the chat (customer will be able to see) an example is shown below:

A screenshot of a form element. On the left is a light gray rectangular box with the text "Subtitle" in a dark gray font. To the right of this box is a white rectangular input field with a thin gray border. Inside the input field, the words "Live Support" are typed in a dark gray font.

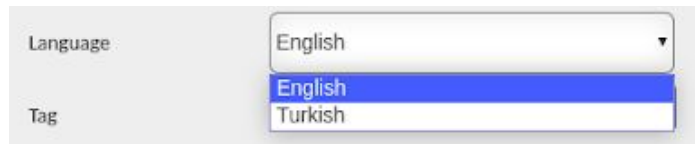
21. Click the “Height” input box type the desired height (Pixels) of the chat window. An example is shown below:

A screenshot of a form element. On the left is a light gray rectangular box with the text "Height" in a dark gray font. To the right of this box is a white rectangular input field with a thin gray border. Inside the input field, the number "300" is typed in a dark gray font.

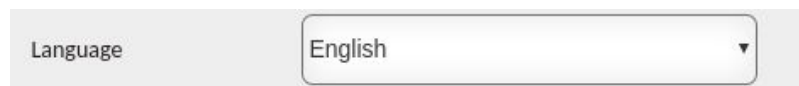
22. Click the “Width” input box type the desired width (Pixels) of the chat window. An example is shown below:

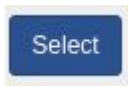
A screenshot of a form element. On the left is a light gray rectangular box with the text "Width" in a dark gray font. To the right of this box is a white rectangular input field with a thin gray border. Inside the input field, the number "300" is typed in a dark gray font.

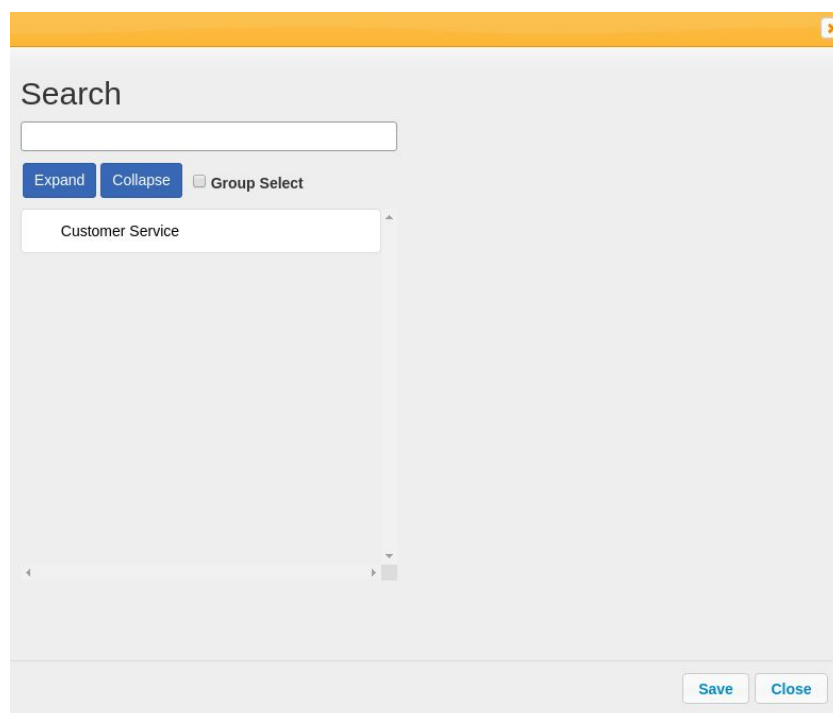
23. Click the “Language” input box, a dropdown list of added languages to the tenant will appear in the following example Turkish, and English were added to the tenant as shown below (Other languages can be added by contacting the Call Center Studio Project Manager):



24. Select the desired language from the dropdown list. An example is shown below:



25. Click the Select button,  to the right of the “Tag” input box. The following pop-up window will appear:

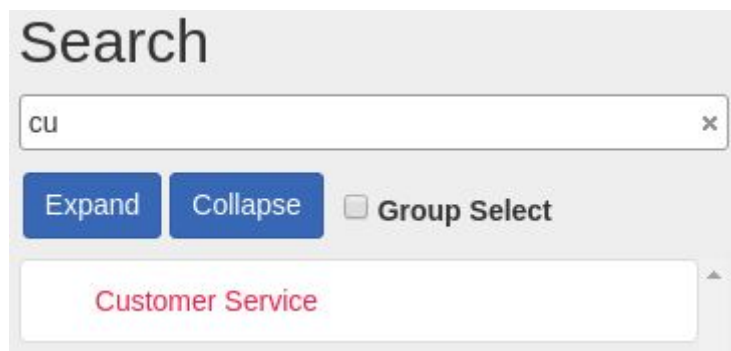


*Note: Only Tags that were made available for the chat can be viewed here (See **Tag** Section)*


26. Search for a Tag using the “Search” input box shown below:


A screenshot of a search interface. At the top, the word "Search" is displayed in a large, bold, black font. Below it is a white rectangular input box with a thin gray border. A small vertical line is visible at the start of the input box, indicating the cursor position.


Note: Partial Tag names can be used for searching purposes all Tags with the partial name will have their name appear in red font as shown below:

A screenshot of the search interface showing results. The "Search" title is at the top. Below it is an input box containing the text "cu" with a small "x" icon to its right. Underneath the input box are two blue buttons labeled "Expand" and "Collapse", followed by a checkbox labeled "Group Select". Below these controls is a list of search results. The first result, "Customer Service", is displayed in a red font, indicating it is a partial match.

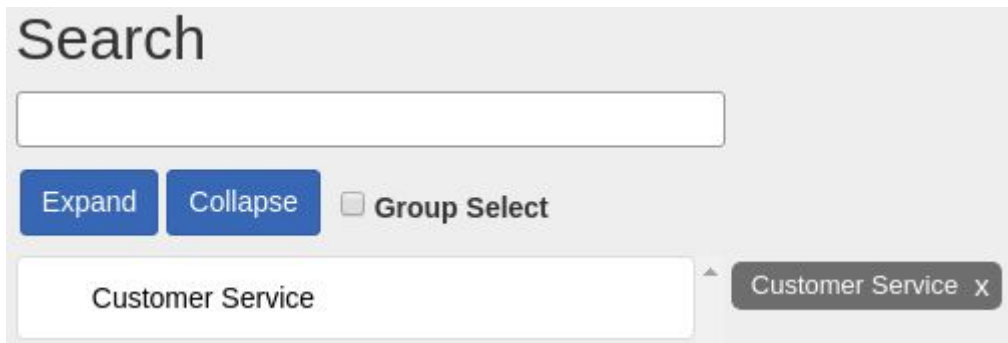
Note:


Press the Expand button, , to expand the selection (Used for child tags)


Press the Collapse button, , to collapse the selection (Used for child tags)

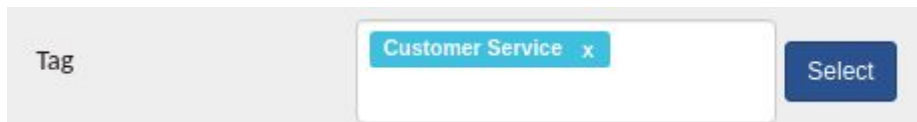
Check the Group Select Checkbox, , to group select tags.

Once a Tag is selected in the pop-up window, it can be viewed to the right of the tag list box, as shown below:



Note: To delete a Tag from the selection simply click the “X,” , to the right of the tag name.

27. Once the desired Tag selections have been selected, they can be viewed to the right of the tag list box click the save button, , the “Tag” input box with an example selection is shown below:



28. Click the “Support Email” type the desired support email. An example is shown below:



29. Following the Support Email input box, there are three checkbox selections outlined below. Select the desired checkboxes:

<div>Email Optional <input type="checkbox"/></div>	<p>Makes the email input field optional for the customer to input.</p>
<div>Phone Optional <input type="checkbox"/></div>	<p>Makes the phone input field optional for the customer to input.</p>
<div>Show Ended Chats on the Agent Screen. <input type="checkbox"/></div>	<p>Shows that the chat ended on the agent's screen.</p>

Below is an example chat window. If the “Email Optional” and “Phone Optional” checkboxes are left unchecked, the visitor of the website will have to input this data before starting the chat:

Live Support

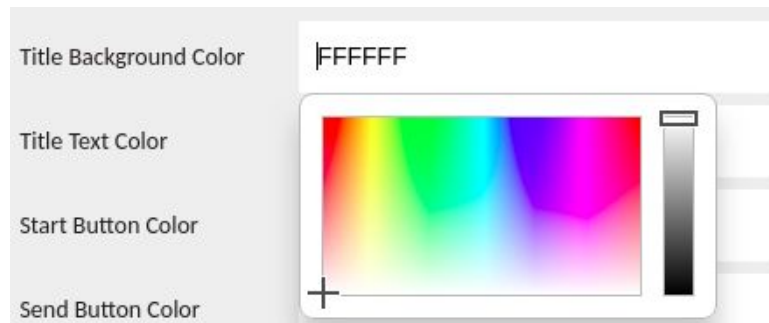
Name Surname

Email

Phone Number

Start Chatting

30. Click the “Title Background Color” input box. A color palette will appear, as shown below:



Note: the default color code is “FFFFFF” representing the color white. All colors within the palette have unique color codes so they can be duplicated.

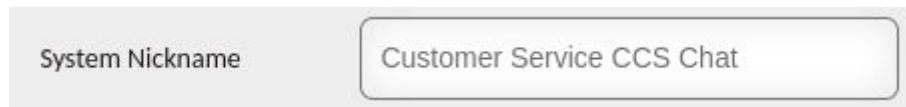
31. Select the desired custom color an example selection is shown below:



32. Click the “Title Text Color” input box, repeat steps 20 -21.
33. Click the “Start button Color” input box, repeat steps 20-21.
34. Click the “Send button Color” input box, repeat steps 20-21.
35. Click the “Logout button Color” input box, repeat steps 20-21, an example is shown below once all of the custom color selections have been completed:

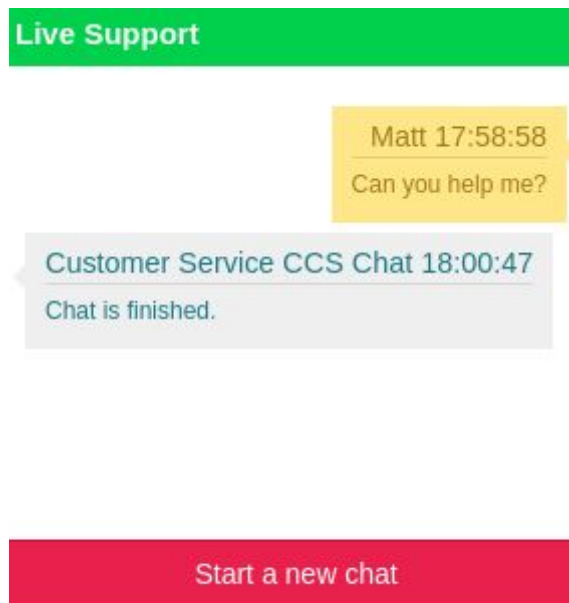


36. Click the “System Nickname” Input box, if desired, type a system nickname the example is shown below:



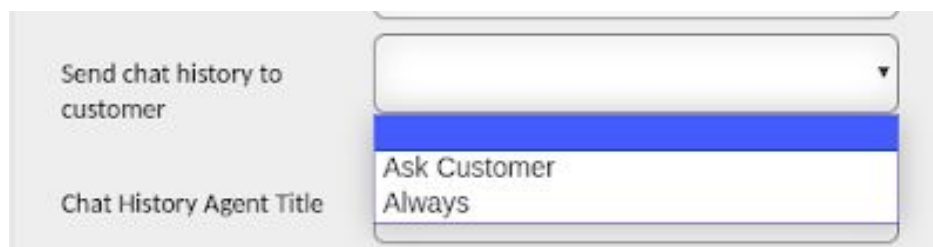
A screenshot of a configuration interface. On the left, the text "System Nickname" is displayed. To its right is a rounded rectangular input box containing the text "Customer Service CCS Chat".

The system nickname is shown at the top of each message sent an example is shown below:



A screenshot of a chat widget interface. At the top is a green bar with the text "Live Support". Below it, a yellow message bubble from "Matt 17:58:58" contains the text "Can you help me?". Below that, a grey message bubble from "Customer Service CCS Chat 18:00:47" contains the text "Chat is finished.". At the bottom is a red button with the text "Start a new chat".

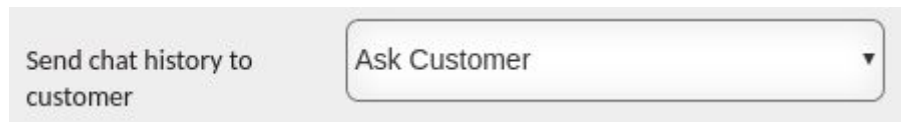
37. Click the “Send Chat History to Customer” input box, a dropdown list will appear with the following two options:



A screenshot of a configuration interface. On the left, the text "Send chat history to customer" is displayed. To its right is a dropdown menu. The dropdown menu is open, showing two options: "Ask Customer" and "Always". Below the dropdown menu, the text "Chat History Agent Title" is displayed.

Note: the selection can also be left blank.

38. Select the desired option, an example selection is shown below:

A screenshot of a user interface element. On the left, the text "Send chat history to customer" is displayed. To its right is a dropdown menu with a white background and a thin grey border. The menu is currently open, showing the selected option "Ask Customer" in a dark grey font. A small downward-pointing triangle is visible on the right side of the dropdown box.

39. Click “Chat History Agent Title”, type a title. An example is shown below:

A screenshot of a user interface element. On the left, the text "Chat History Agent Title" is displayed. To its right is a text input field with a white background and a thin grey border. The field contains the text "Agent" in a dark grey font.

Note: This screenshot has been taken from the Chat Record in Quality Control from the Chat History Tab, The “Chat History Agent Title” can be found in between the agent’s name and the chat date as shown below:

A screenshot of a chat record entry. It features a light grey background with a white speech bubble on the left. Inside the speech bubble, the text "John Smith - Queue - 2020-07-07 19:35:44" is displayed in a teal font. Below this text, the question "How can I help you?" is displayed in a teal font.

40. Click the “Widget Versions” input box, a dropdown list of created widget versions will be displayed along with a customize option an example dropdown selection is shown below:

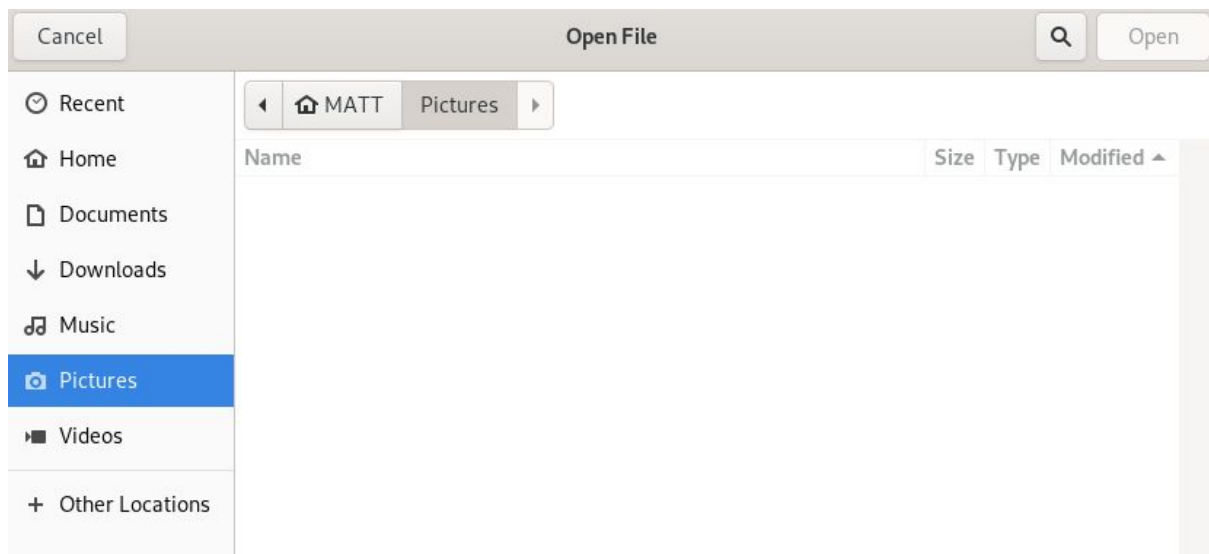


Version 1	Shows the chat window on the customer’s screen with square corners. (Used for webchat aka CCS Chat)
Version 2	Shows the chat window on the customer’s screen with rounded corners. (Used for webchat aka CCS Chat)
Customize	Shows the chat window on the customer’s screen with rounded corners, and a custom logo can be added to the chat window as well. (Used for webchat aka CCS Chat)

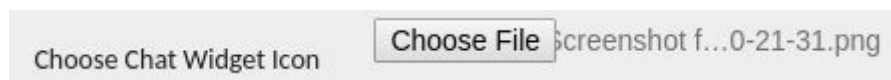
41. Select the desired widget version an example selection is shown below:



42. To the left of the title “Chose Chat Widget Icon,” (Used exclusively for creating an icon for the webchat (aka CCS Chat) files can be uploaded in .png, .jpeg, .jpg) click the choose file button, **Choose File**, to create a custom chat icon from saved photos on the device. A pop-up window will appear showing the saved files as shown below:



43. If a custom icon is desired, navigate to the appropriate saved location and select the appropriate image, once selected the pop-up window will show the saved image, an example is shown below:






44. Check “Auto Finish” checkbox, if desired to auto finish the chat, the checked Auto Finish checkbox is shown below:



45. In the “Auto Finish Duration” input box type the desired time frame for the chat to auto finish (only can be used if the Auto Finish checkbox is checked) an example time frame is shown below:



46. Click the “Action Type After Parking” input box a dropbox will appear. Select, if desired, the appropriate action after parking. The three actions are described below:

	<p>When parking is pressed by the agent, the customer will be transferred to the queue.</p>
	<p>When parking is pressed, the customer will be placed on hold. Agents can answer other chats, but when the customer responds, the same agent will receive the chat.</p>
	<p>When parking is pressed, the customer will be transferred to the ICR assigned to the chat widget.</p>

47. In the “First Welcoming Message” input box, type a first welcoming message for the chat if desired an example is shown below:

First Welcoming Message	<div>Hello, Thank you for using our chat system.</div>
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48. In the “Welcoming Message” input box, type a welcoming message for the chat if desired an example is shown below:

Welcoming Message	<div>How can I help you today? </div>
-------------------	---------------------------------------

49. In the “Closing Message” input box, type a closing message for the chat if desired an example is shown below:

Closing Message	<div>Have a nice day!</div>
-----------------	-----------------------------

50. In the “Agent left Message” input box, type an agent left message for the chat if desired an example is shown below:

Agent Left Message	<div>The agent has left the chat. A new agent will join shortly.</div>
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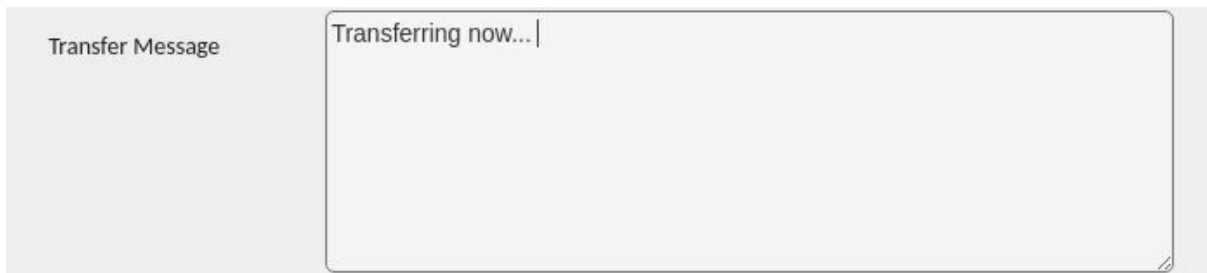
51. In the “Queue Message” input box, type a queue message for the chat if desired an example is shown below:

Queue Message	<div>A customer service agent will be with you shortly.</div>
---------------	---

52. In the “Auto Finish Message” input box, type an auto finish message for the chat if desired an example is shown below:

Auto Finish Message	<div>Goodbye!</div>
---------------------	---------------------

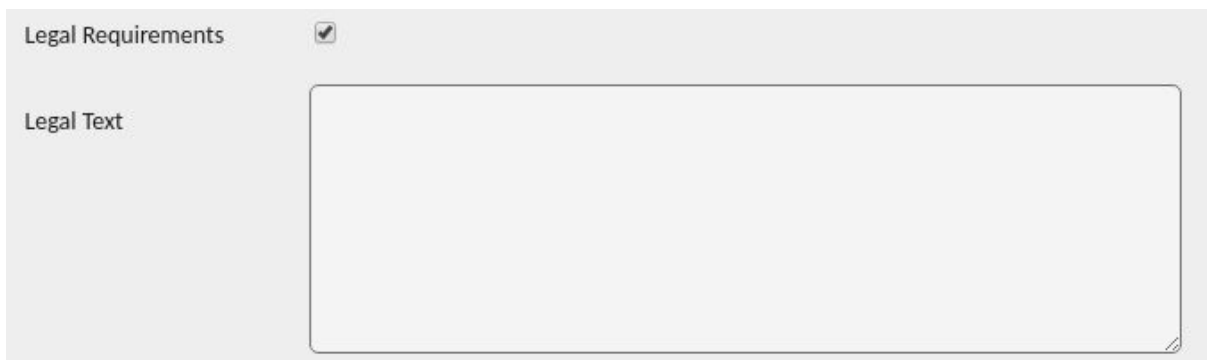
53. In the “Transfer Message” input box, type a transfer message for the chat if desired an example is shown below:

A screenshot of a web interface showing a 'Transfer Message' section. On the left, the text 'Transfer Message' is displayed. To its right is a large, empty text input box with a light gray border and a small cursor icon at the bottom right corner. The text 'Transferring now...' is visible at the top left of the input box.

54. In the “Auto Finish Duration” input box, type a time duration for the chat to Auto Finish, if desired. An example is shown below:

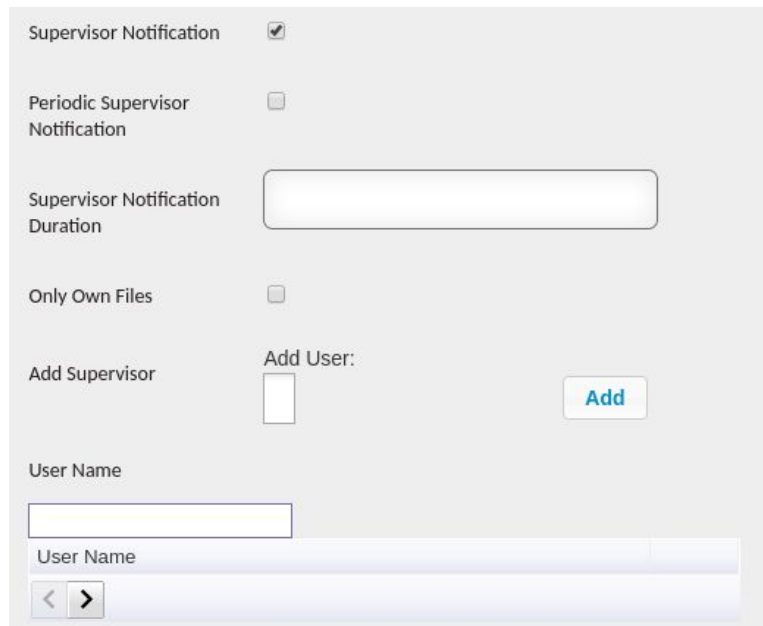
A screenshot of a web interface showing an 'Auto Finish Message Duration' section. On the left, the text 'Auto Finish Message Duration' is displayed. To its right is a text input box containing the number '180'.

55. If a legal message is desired in the chat check the checkbox entitled “Legal Requirements,” when the box is checked the following “Legal Text” input box will be displayed:

A screenshot of a web interface showing a 'Legal Requirements' section. On the left, the text 'Legal Requirements' is displayed next to a checked checkbox. Below this, the text 'Legal Text' is displayed. To the right of 'Legal Text' is a large, empty text input box with a light gray border and a small cursor icon at the bottom right corner.

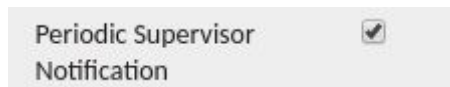
56. If desired in the “Legal Text” input box type the desired legal text.

57. If supervisor notifications are desired for the chat check the checkbox entitled “Supervisor Notification,” when the box is checked the following will be displayed:



The screenshot shows a settings panel for Supervisor Notifications. It includes a checked checkbox for "Supervisor Notification", an unchecked checkbox for "Periodic Supervisor Notification", a text input field for "Supervisor Notification Duration", an unchecked checkbox for "Only Own Files", and an "Add Supervisor" section with an "Add User:" label, a small input field, and an "Add" button. At the bottom, there is a "User Name" label and a list of users with a scroll bar.

58. If periodic supervisor notification is desired, check the “Periodic Supervisor Notification” checkbox as displayed below (When selected if an agent does not respond within the Supervisor Notification Duration to a customer’s chat, the supervisor will receive a notification):



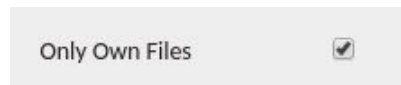
The screenshot shows a single checkbox labeled "Periodic Supervisor Notification" which is checked.

59. Click the “Supervisor Notification Duration” input box, type the desired supervisor notification duration an example is displayed below:

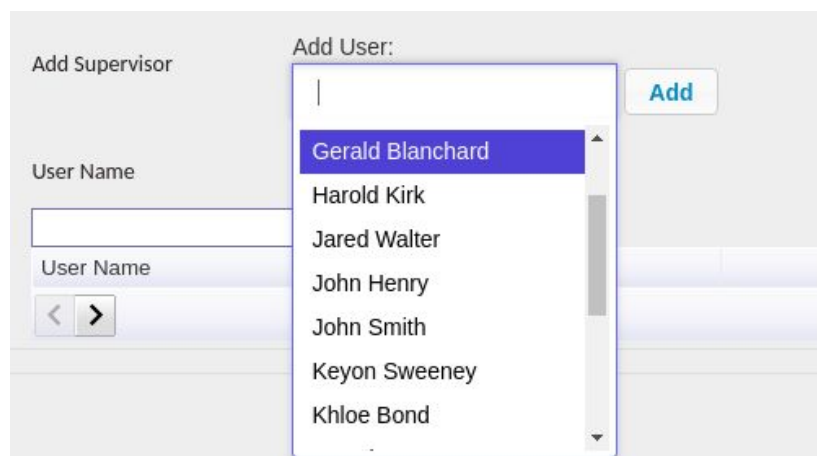



The screenshot shows a text input field labeled "Supervisor Notification Duration" with the value "180" entered.

60. Check the “Only Own Files” checkbox, an example is shown below (When selected agents cannot upload files from their desktop to send to a customer, they can only use the template messages created in the tenant with attachments):




61. Click the “Add Supervisor” input box and start typing the name of the supervisor to add a dropdown list will appear to facilitate in choosing a supervisor as shown below:



62. Select the desired Supervisor and click the add button, .

63. The supervisor’s name will appear in the “User Name” field an image of this field is shown below:



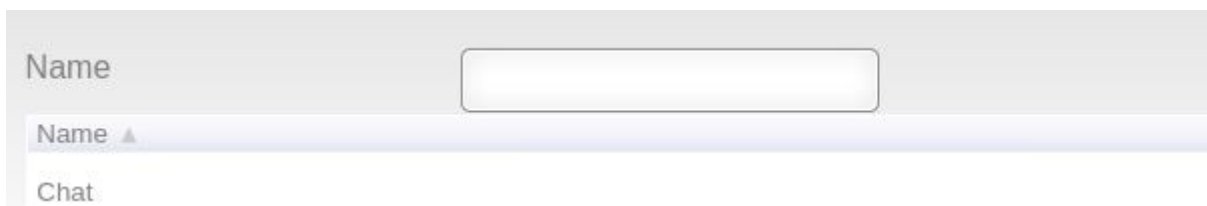
Note: To delete a supervisor, click the delete button, , located to the right of the supervisor’s name.

64. Click the “Finish Button Action Type” input box a dropdown list will appear with two selections described below choose the desired selection or none at all:




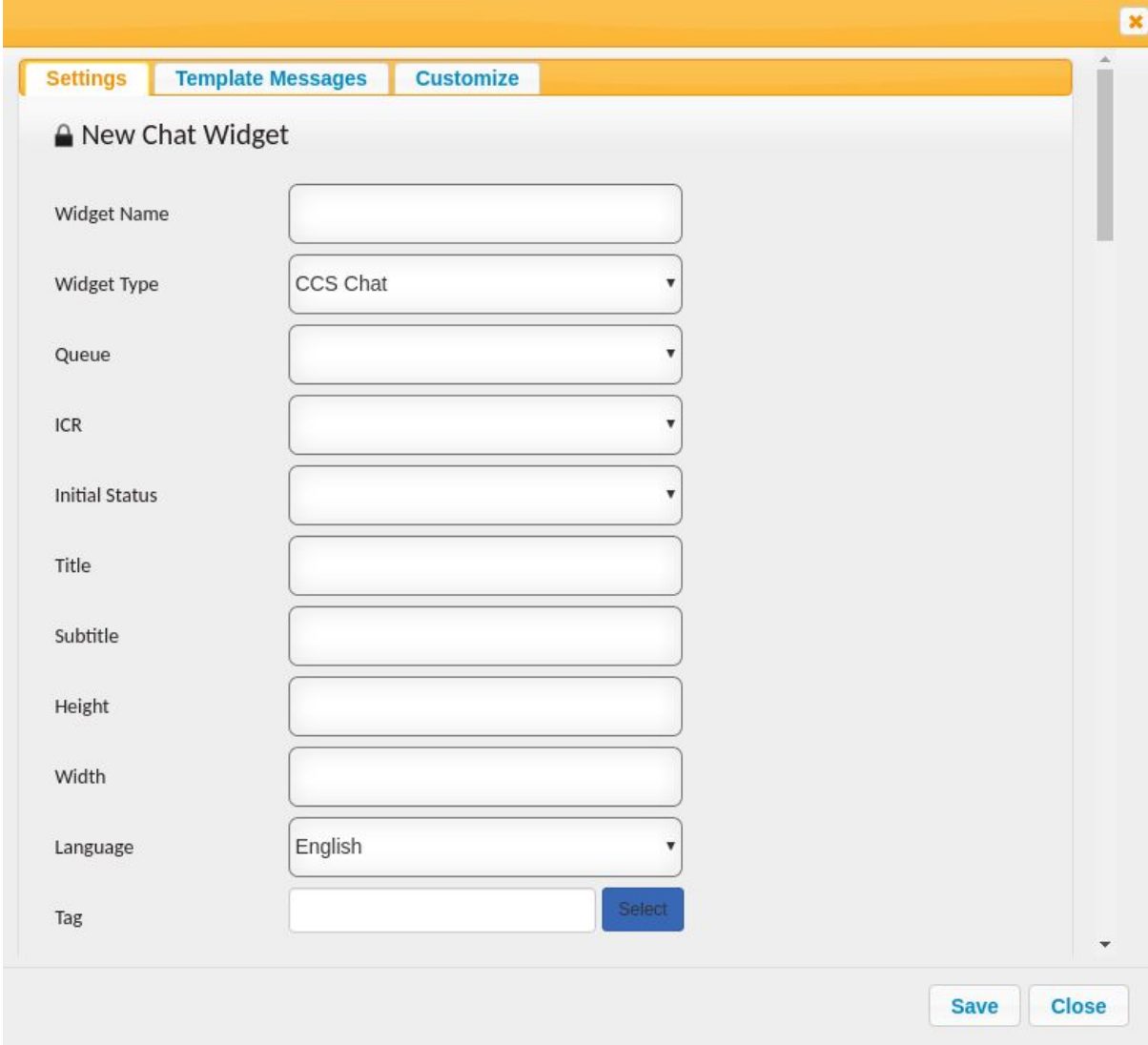
Chat End	Ends the chat.
Chat Park	Parks the chat, which means if the client’s customer responds to the chat again within 24 hours. The same agent can respond to the chat and also review the prior conversation.

65. If Template Messages or customized messages are desired (See the Template Messages and Customize Sections) otherwise click the save button, [Save](#), the created CCS chat can be viewed in the chat widget name list as shown below:



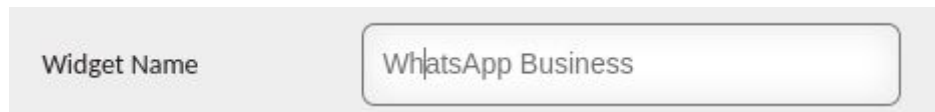
Creating a WhatsApp Business Widget (Settings Tab)

1. Click the “New” button, , located in the top right corner of the Chat Widget screen, the following pop-up screen will appear as shown below:



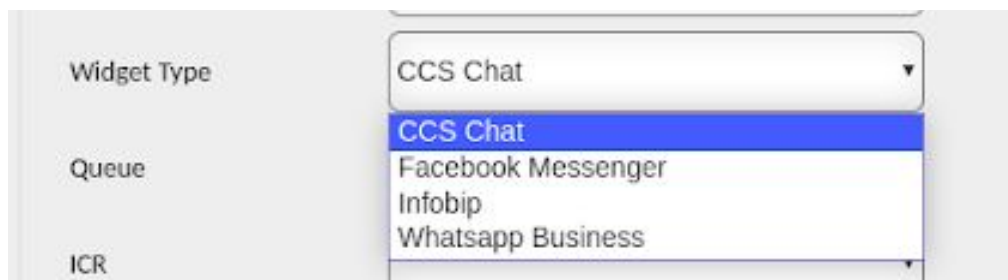
Note: All the input boxes are not shown in this photo; the user has to use the scroll bar on the right hand side of the input box to view the additional input boxes.

2. Click the “Widget Name” input box, type the desired name an example is shown below:



Widget Name

3. Click the “Widget Type” input box. A dropdown menu will appear an example is shown below:

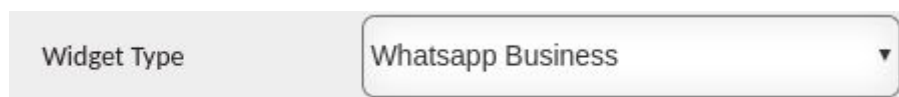


Widget Type

Queue

ICR

4. Select the “Whatsapp Business” from the dropdown list an example selection is shown below:



Widget Type

5. Click the “WA Business Username” input box, type the WA Business Username an example is shown below:



WA Business Username

6. Click the “WA Business Password” input box, type the WA Business Password an example is shown below:

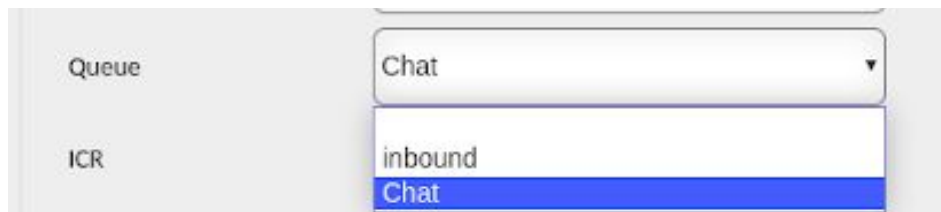


WA Business Password

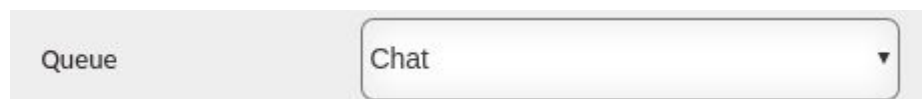
7. Click the “Admin Auth Token” input box, type the Admin Auth Token (Provided by the Call Center Studio Team) After seven days, the token changes automatically. It is essential for using the WhatsApp Business API.
8. Click the “WA Business Endpoint” input box, type the server address provided by the Call Center Studio Team.
9. Click the “WhatsApp Phone Number” input box, type the WhatsApp Phone Number the input box is shown below:

A screenshot of a form field labeled "Whatsapp Phone Number" in a light gray box. To the right of the label is a white rectangular input box with a thin gray border.

10. Click the “Queue” input box, a dropdown menu will appear with available queue selections (See Queue Section to enable chat on a queue) an example is shown below:

A screenshot showing a dropdown menu for the "Queue" field. The dropdown is open, displaying three options: "Chat", "inbound", and "Chat". The "Chat" option at the bottom is highlighted with a blue background. To the left of the dropdown, the labels "Queue" and "ICR" are visible in a light gray box.

11. Select the desired queue from the dropdown list an example selection is shown below:

A screenshot showing the "Queue" dropdown menu with the "Chat" option selected. The dropdown is closed, and the word "Chat" is displayed inside the dropdown box. To the left, the label "Queue" is visible in a light gray box.

12. Select the “ICR” input box, a dropdown menu will appear with ICR selections (See the ICR section for more details) an example is shown below:



A screenshot of a form with two labels: "ICR" and "Initial Status". The "ICR" label is positioned above a dropdown menu that is open, showing a list of options. The "Initial Status" label is positioned below the "ICR" label and above a text input field containing the word "test".

Note: Interactive Chat Response brings an IVR tree to a chat platform. It can be used in all chat channels, web chat, Facebook, whatsapp, etc. It enables customers to self select their queues, make requests, etc.

13. Select an ICR from the dropdown list if desired an example selection is shown below:



A screenshot of a form with a label "ICR" positioned above a dropdown menu. The dropdown menu is open, showing a list of options, with the word "test" selected and highlighted in blue.

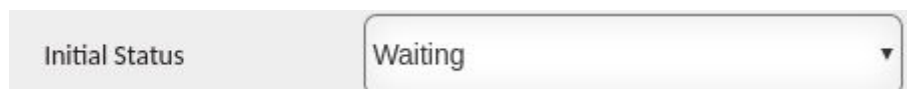
14. Click the “Initial Status” input box a dropdown menu will appear an example is shown below:



A screenshot of a form with two labels: "Initial Status" and "Title". The "Initial Status" label is positioned above a dropdown menu that is open, showing a list of options. The "Title" label is positioned below the "Initial Status" label and above a text input field containing the word "Waiting".

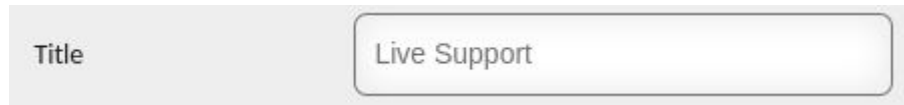
Note: This selection can only be used when an ICR is not used. This status is used for reporting to show the initial status as “waiting,” “blank,” or “ICR Status.”

15. Select the desired initial status or none at all from the dropdown selection, an example selection is shown below:



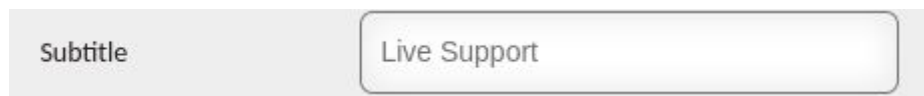
A screenshot of a form with a label "Initial Status" positioned above a dropdown menu. The dropdown menu is open, showing a list of options, with the word "Waiting" selected and highlighted in blue.

16. Click the “Title” input box, type a name for the Chat (Customer will be able to see) an example is shown below:



A screenshot of a form with a label 'Title' on the left and a text input box on the right. The input box contains the text 'Live Support'.

17. Click the “Subtitle” input box, type a name for the subtitle of the chat (Customer will be able to see) an example is shown below:



A screenshot of a form with a label 'Subtitle' on the left and a text input box on the right. The input box contains the text 'Live Support'.

18. Click the “Height” input box type the desired height (Pixels) of the chat window. An example is shown below:



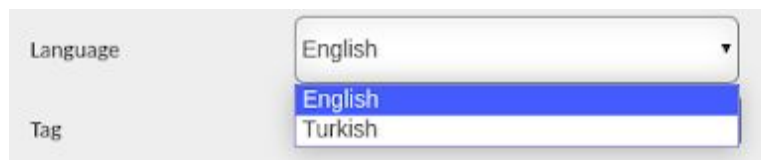
A screenshot of a form with a label 'Height' on the left and a text input box on the right. The input box contains the text '300'.

19. Click the “Width” input box type the desired width (Pixels) of the chat window. An example is shown below:




A screenshot of a form with a label 'Width' on the left and a text input box on the right. The input box contains the text '300'.


20. Click the “Language” input box, a dropdown list of added languages to the tenant will appear in the following example Turkish, and English were added to the tenant as shown below (Other languages can be added by contacting the Call Center Studio Project Manager):

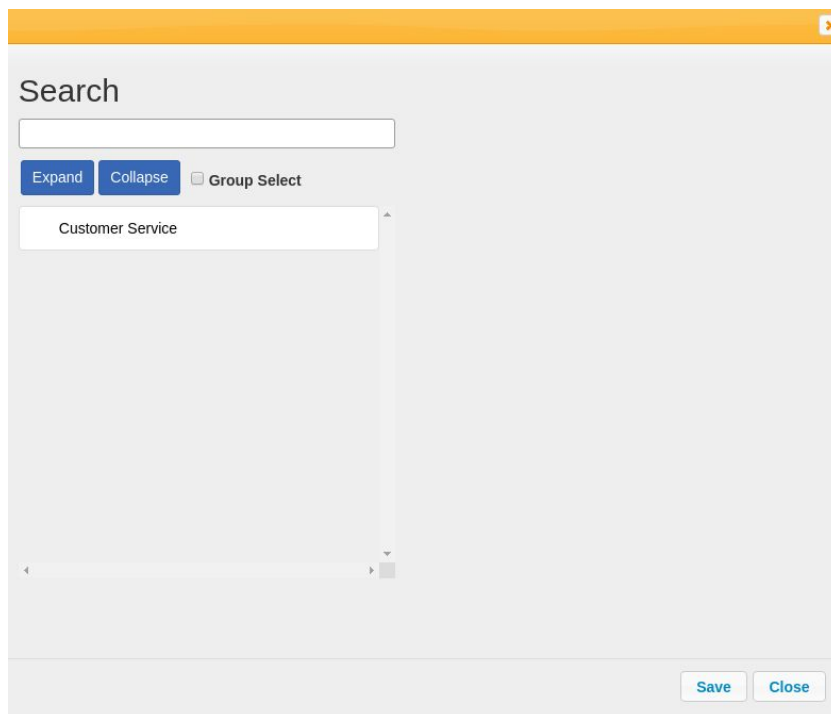


A screenshot of a form with a label 'Language' on the left and a dropdown menu on the right. The dropdown menu is open, showing a list of options: 'English' (selected), 'English', and 'Turkish'. Below the dropdown menu, there is a label 'Tag'.

21. Select the desired language from the dropdown list. An example is shown below:

A light gray rectangular box containing the word "Language" on the left and a dropdown menu on the right. The dropdown menu is open, showing "English" with a small downward arrow on the right side.

22. Click the Select button,  to the right of the “Tag” input box. The following pop-up window will appear:

A pop-up window with a yellow title bar and a close button (X) in the top right corner. The window has a light gray background. At the top, the word "Search" is displayed. Below it is a white input field. Under the input field are two blue buttons: "Expand" and "Collapse", followed by a checkbox labeled "Group Select". Below these is a white box containing the text "Customer Service" with a small upward arrow on the right. At the bottom right of the window are two buttons: "Save" and "Close".

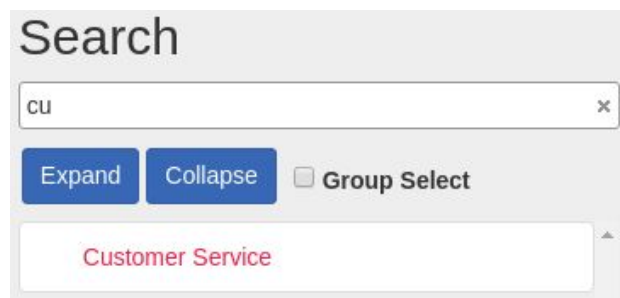
*Note: Only Tags that were made available for the chat can be viewed here (See **Tag** Section)*

23. Search for a Tag using the “Search” input box shown below:




A search input box with the label "Search" above it. The input field is empty and has a vertical cursor on the left.


Note: Partial Tag names can be used for searching purposes all Tags with the partial name will have their name appear in red font as shown below:



A search interface showing a search box with the text "cu" and a clear button (x). Below the search box are two buttons: "Expand" and "Collapse", and a checkbox labeled "Group Select". Below these is a list of search results, with "Customer Service" highlighted in red text.

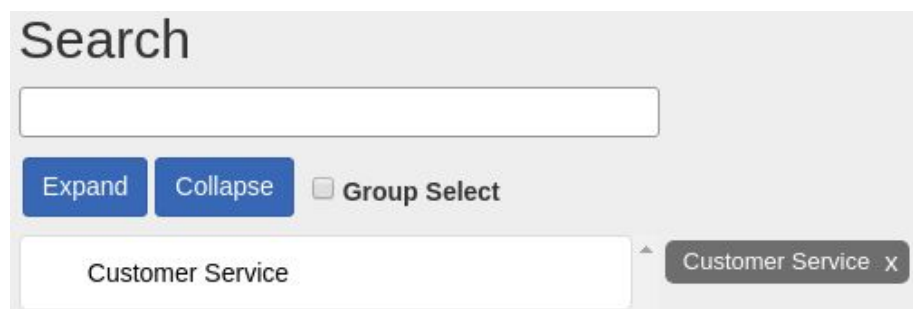
Note:

Press the Expand button, , to expand the selection (Used for child tags)


Press the Collapse button, , to collapse the selection (Used for child tags)


Check the Group Select Checkbox, , to group select tags

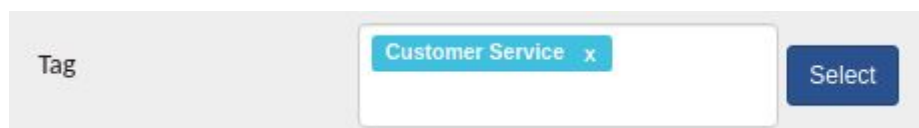
Once a Tag is selected in the pop-up window, it can be viewed to the right of the tag list box, as shown below:



A search interface showing a search box. Below the search box are two buttons: "Expand" and "Collapse", and a checkbox labeled "Group Select". Below these is a list of search results, with "Customer Service" highlighted in red text. To the right of the list, there is a button labeled "Customer Service" with a clear button (x).

Note: To delete a Tag from the selection simply click the “X,” , to the right of the tag name.

24. Once the desired Tag selections have been selected and can be viewed to the right of the tag list box click the save button, , the “Tag” input box with an example selection is shown below:



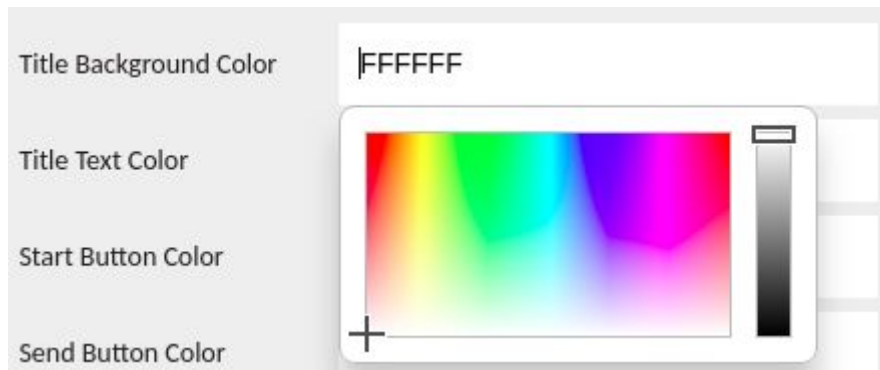
25. Click the “Support Email” type the desired support email. An example is shown below:



26. Following the “Support Email” input box, there are three checkbox selections outlined below select the desired checkboxes:

<div>Email Optional <input type="checkbox"/></div>	<p>Makes the email optional for the customer to input.</p>
<div>Phone Optional <input type="checkbox"/></div>	<p>Makes the phone optional for the customer to input.</p>
<div>Show Ended Chats on the Agent Screen. <input type="checkbox"/></div>	<p>Shows that the chat ended on the agent’s screen.</p>

27. Click the “Title Background Color” input box. A color palette will appear, as shown below:



Note: the default color code is “FFFFFF” representing the color white. All colors within the palette have unique color codes so they can be duplicated.

28. Select the desired custom color an example selection is shown below:



29. Click the “Title Text Color” input box, repeat steps 20 -21.

30. Click the “Start button Color” input box, repeat steps 20-21.

31. Click the “Send button Color” input box, repeat steps 20-21.

32. Click the “Logout button Color” input box, repeat steps 20-21, an example is shown below once all of the custom color selections have been completed:

Title Background Color	466DFF
Title Text Color	67FF98
Start Button Color	FF4365
Send Button Color	FFF365
Logout Button Color	000000

33. Click the “System Nickname” Input box, if desired, type a system nickname the example is shown below:

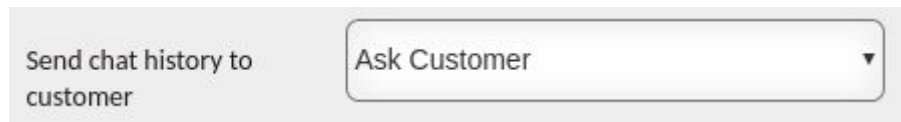
System Nickname	Customer Service CCS Chat
-----------------	---------------------------

34. Click the “Send Chat History to Customer” input box, a dropdown list will appear with the following two options:

Send chat history to customer	<div>▼</div>
Chat History Agent Title	Ask Customer Always

Note: the selection can also be left blank.


35. Select the desired option, an example selection is shown below:

A screenshot of a user interface element. On the left, the text "Send chat history to customer" is displayed. To its right is a dropdown menu with a white background and a thin grey border. The menu is currently open, showing the selected option "Ask Customer" in a dark grey font. A small downward-pointing triangle is visible on the right side of the dropdown box.

36. Click “Chat History Agent Title”, type a title an example is shown below:

A screenshot of a user interface element. On the left, the text "Chat History Agent Title" is displayed. To its right is a text input field with a white background and a thin grey border. The field contains the text "Agent" in a dark grey font.

Note: This screenshot has been taken from the Chat Record in Quality Control from the Chat History Tab, The “Chat History Agent Title” can be found in between the agent’s name and the chat date as shown below:

A screenshot of a chat record entry. It features a light grey background with a white speech bubble on the left. Inside the bubble, the text "John Smith - Queue - 2020-07-07 19:35:44" is displayed in a teal font. Below this text, the question "How can I help you?" is written in a dark grey font.

37. Click the “Widget Versions” input box, a dropdown list of created widget versions will be displayed along with a customize option an example dropdown selection is shown below:

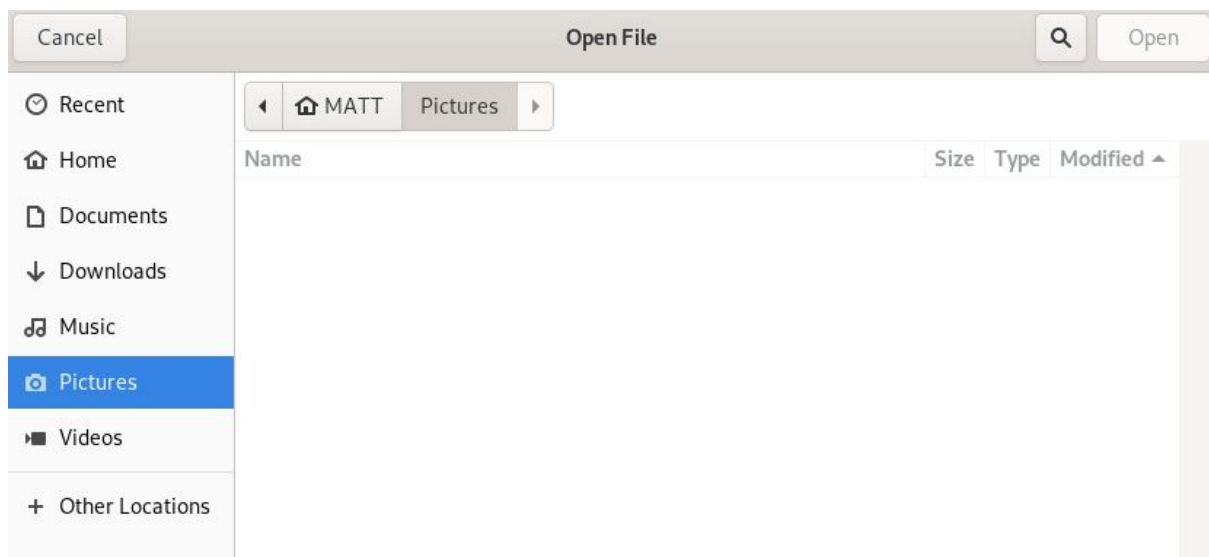


Version 1	Shows the chat window on the customer’s screen with square corners. (Used for webchat aka CCS Chat).
Version 2	Shows the chat window on the customer’s screen with rounded corners. (Used for webchat aka CCS Chat).
Customize	Shows the chat window on the customer’s screen with rounded corners, and a custom logo can be added to the chat window as well. (Used for webchat aka CCS Chat).

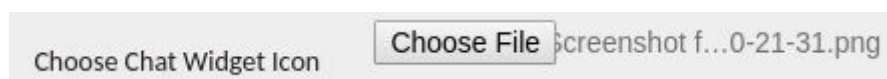
38. Select the desired widget version an example selection is shown below:



39. To the left of the title “Chose Chat Widget Icon,” (Used exclusively for creating an icon for the webchat (aka CCS Chat) files can be uploaded in .png, .jpeg, .jpg) click the choose file button, **Choose File**, to create a custom chat icon from saved photos on the device. A pop-up window will appear showing your saved files as shown below:



40. If a custom icon is desired, navigate to the appropriate saved location and select the appropriate image, once selected the pop-up window will show the saved image, an example is shown below:






41. Next to the “Auto Finish” checkbox, check auto finish if desired to auto finish the chat, the checked Auto Finish checkbox is shown below:



42. In the “Auto Finish Duration” input box type the desired time frame for the chat to auto finish (only can be used if the “Auto Finish” checkbox is checked) an example time frame is shown below:



43. Click the “Action Type After Parking” input box a dropbox will appear. Select, if desired, the appropriate action after parking. The three actions are described below:

	<p>When parking is pressed by the agent, the customer will be transferred to the queue.</p>
	<p>When parking is pressed, the customer will be placed on hold. Agents can answer other chats, but when the customer responds the same agent will receive the chat.</p>
	<p>When parking is pressed, the customer will be transferred to the ICR assigned to the chat widget.</p>

44. In the “First Welcoming Message” input box, type a first welcoming message for the chat if desired an example is shown below:

45. In the “Welcoming Message” input box, type a welcoming message for the chat if desired an example is shown below:

Welcoming Message	<div>How can I help you today? </div>
-------------------	---------------------------------------

46. In the “Closing Message” input box, type a closing message for the chat if desired an example is shown below:

Closing Message	<div>Have a nice day!</div>
-----------------	-----------------------------

47. In the “Agent left Message” input box, type an Agent Left message for the chat if desired an example is shown below:

Agent Left Message	<div>The agent has left the chat. A new agent will join shortly.</div>
--------------------	--

48. In the “Queue Message” input box, type a queue message for the chat if desired an example is shown below:

Queue Message	<div>A customer service agent will be with you shortly.</div>
---------------	---

49. In the “Auto Finish Message” input box, type an auto finish message for the chat if desired an example is shown below:

Auto Finish Message	<div>Goodbye!</div>
---------------------	---------------------

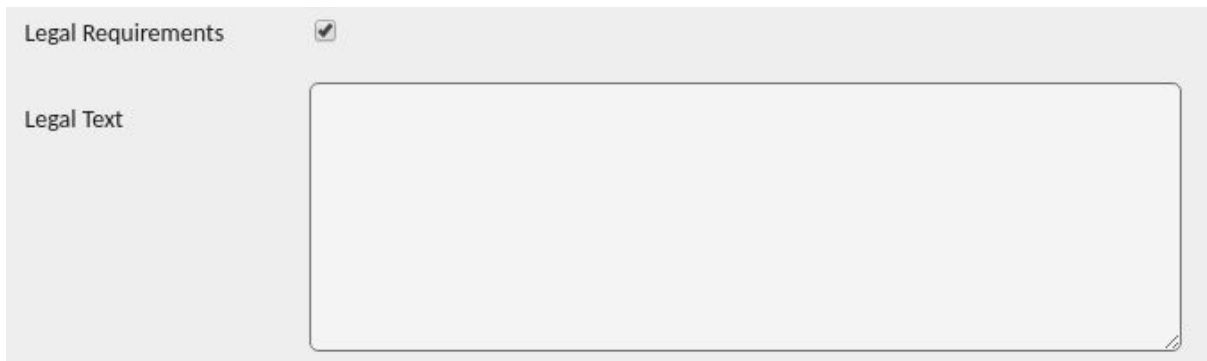
50. In the “Transfer Message” input box, type a transfer message for the chat if desired an example is shown below:

Transfer Message	<div>Transferring now... </div>
------------------	---------------------------------

51. In the “Auto Finish Duration” input box, type a time duration for the chat to Auto Finish if desired an example is shown below:

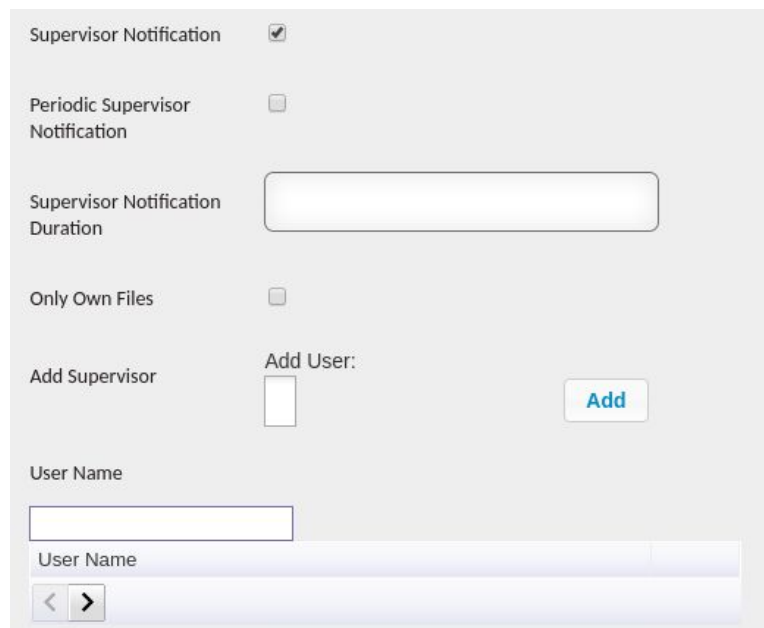
Auto Finish Message Duration	<div>180</div>
---------------------------------	----------------

52. If a legal message is desired in the chat check the checkbox entitled “Legal Requirements,” when the box is checked the following “Legal Text” input box will be displayed:



The screenshot shows a configuration panel for the chat widget. At the top, there is a section titled "Legal Requirements" with a checked checkbox. Below this, there is a label "Legal Text" followed by a large, empty rectangular text input box.

53. If desired in the “Legal Text” input box type the desired legal text.
54. If supervisor notifications are desired for the chat check the checkbox entitled “Supervisor Notification,” when the box is checked the following will be displayed:



The screenshot shows a configuration panel for supervisor notifications. It includes several options: "Supervisor Notification" (checked), "Periodic Supervisor Notification" (unchecked), "Supervisor Notification Duration" (with an empty input box), "Only Own Files" (unchecked), and "Add Supervisor" (with an empty input box). There is also an "Add User:" label with a small input box and an "Add" button. At the bottom, there is a "User Name" label with an empty input box and a list of users with "User Name" labels and navigation arrows.

55. If periodic supervisor notification is desired, check the “Periodic Supervisor Notification” checkbox as displayed below (When selected if an agent does not respond within the Supervisor Notification Duration to a customer’s chat, the supervisor will receive a notification):



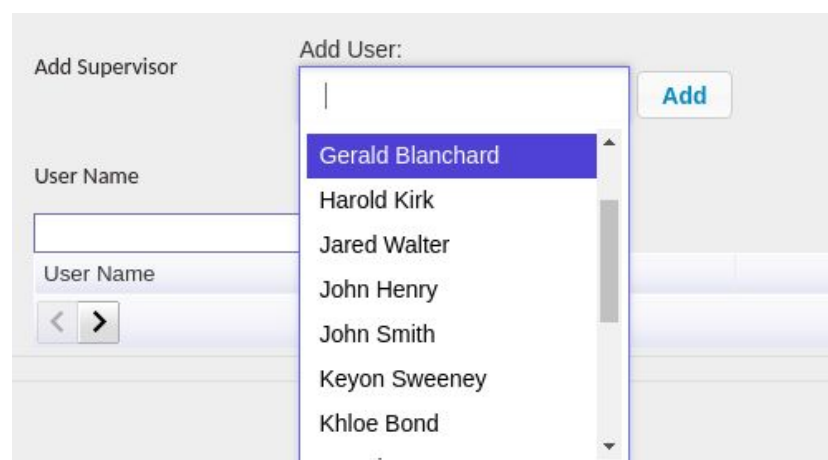
56. Click the “Supervisor Notification Duration” input box, type the desired supervisor notification duration an example is displayed below:




57. Check the “Only Own Files” checkbox, an example is shown below (When selected agents cannot upload files from their desktop to send to a customer, they can only use the template messages created in the tenant with attachments):



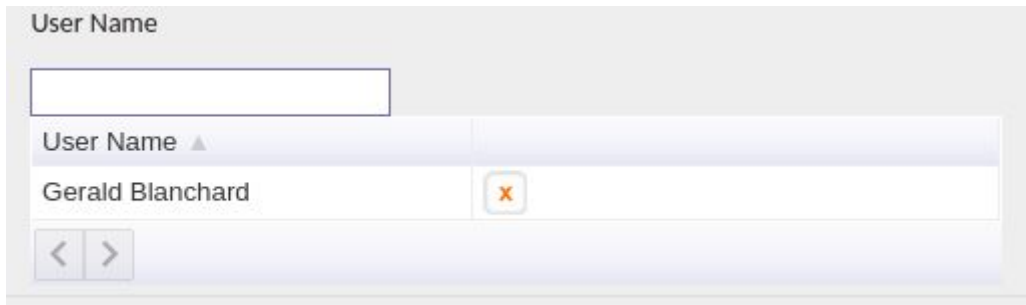
58. Click the “Add Supervisor” input box and start typing the name of the supervisor to add a dropdown list will appear to facilitate in choosing a supervisor as shown below:




The screenshot shows the 'Add Supervisor' form. It includes a 'User Name' input field and a 'User Name' label. Below the input field is a dropdown list with the following names: Gerald Blanchard, Harold Kirk, Jared Walter, John Henry, John Smith, Keyon Sweeney, and Khloe Bond. The 'Add' button is visible to the right of the dropdown list.

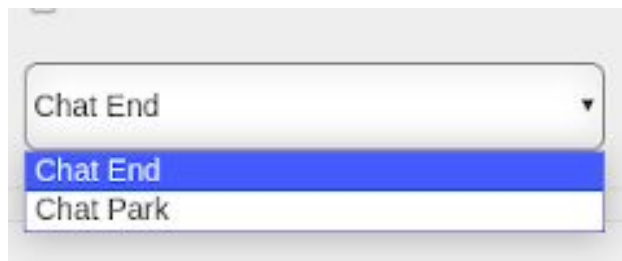
59. Select the desired Supervisor and click the add button, .

60. The supervisor's name will appear in the "User Name" field an image of this field is shown below:




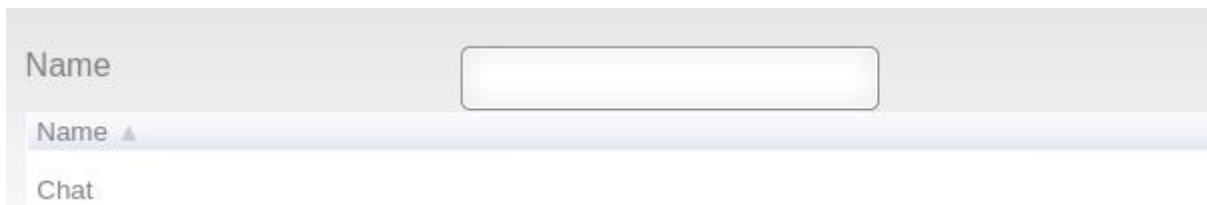
Note: To delete a supervisor, click the delete button, , located to the right of the supervisor's name.

61. Click the "Finish Button Action Type" input box a dropdown list will appear with two selections described below choose the desired selection or none at all:



Chat End	Ends the chat.
Chat Park	Parks the chat, which means if the client's customer responds to the chat again within 24 hours. The same agent can respond to the chat and also review the prior conversation.

62. If Template Messages or customized messages are desired (See the Template Messages and Customize Sections) otherwise click the save button, , the created WhatsApp business chat can be viewed in the chat widget name list as shown below:

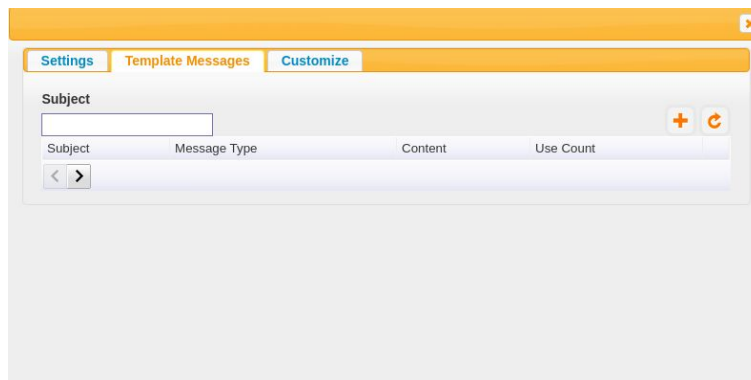
A screenshot of a web interface showing a list of chat widgets. At the top, there is a header row with a "Name" label and an empty text input field. Below this is a table with a light blue header row containing "Name" and a small upward-pointing triangle. The first row of the table has a single cell with the text "Chat".


Creating a Template Message (Template messages Tab)

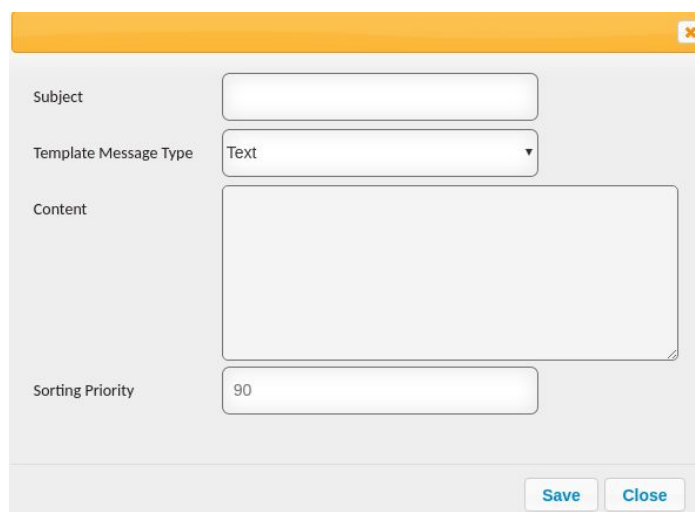
Template messages are prewritten messages that the agent can use to expedite customer service requests. Normally messages are created based on frequently asked questions associated with the business.

1. From the main widget pop-up screen click the Template Messages Tab,

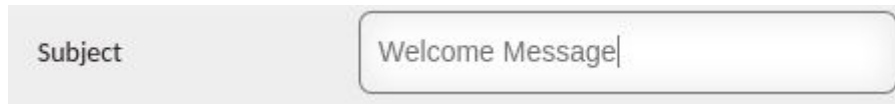
Template Messages, located to the right of the settings tab, **Settings**, the following screen will appear:



2. Click the “New” button, , located in the top right-hand corner of the pop-up window, the following screen will be displayed:

A screenshot of the 'New Template Message' form. The form has a yellow header bar with a close button (X). The form contains the following fields: 'Subject' (text input), 'Template Message Type' (dropdown menu with 'Text' selected), 'Content' (large text area), and 'Sorting Priority' (text input with '90' entered). At the bottom right, there are two buttons: 'Save' and 'Close'.

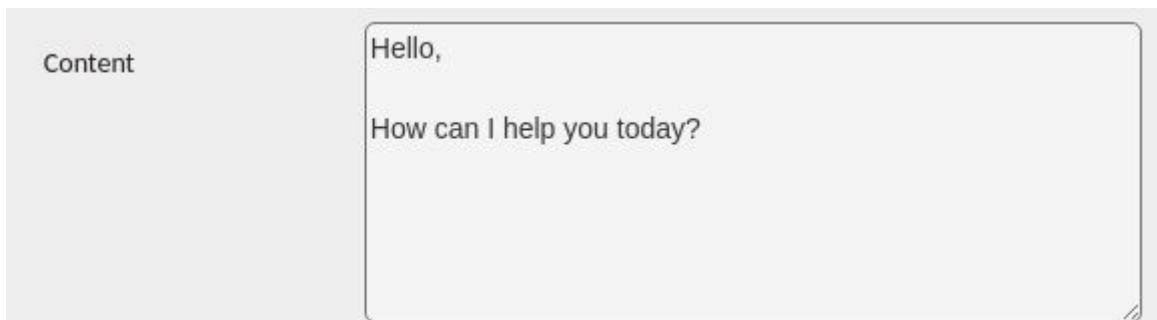
3. Click the “Subject” input box, type the subject of the template. An example is shown below:

A screenshot of a web form. On the left, there is a label 'Subject' in a light gray box. To its right is a text input field with a rounded border. Inside the input field, the text 'Welcome Message' is typed, followed by a cursor.

4. Click the “Template Message Type” input box. A dropdown selection will appear with three selection types explained below to select the desired type from the list:

Text	Template message that sends the prewritten text.
Image	Template message that sends the uploaded image.
Document	Template message that sends the uploaded document.

5. Click the “Content” input box and type the content you want to display; an example is shown below:

A screenshot of a web form. On the left, there is a label 'Content' in a light gray box. To its right is a large text input field with a rounded border. Inside the input field, the text 'Hello, How can I help you today?' is typed. A small cursor icon is visible at the bottom right of the input field.

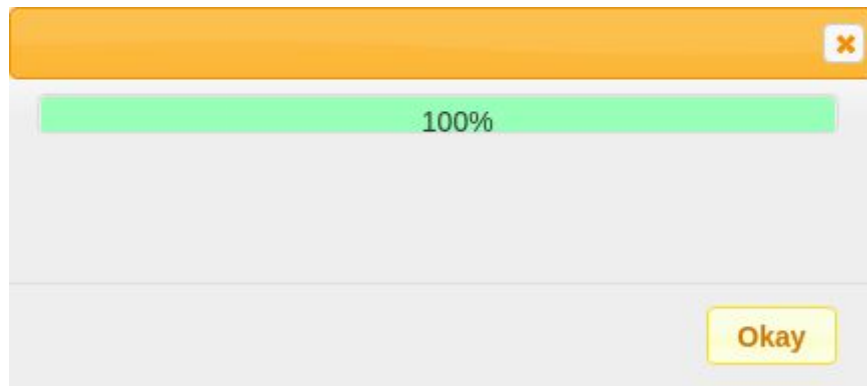
6. In the “Sorting Priority” input box, type the desired sorting priority (the higher the number, the template message will be listed closer to the top for easy agent selection).

A default example is shown below:

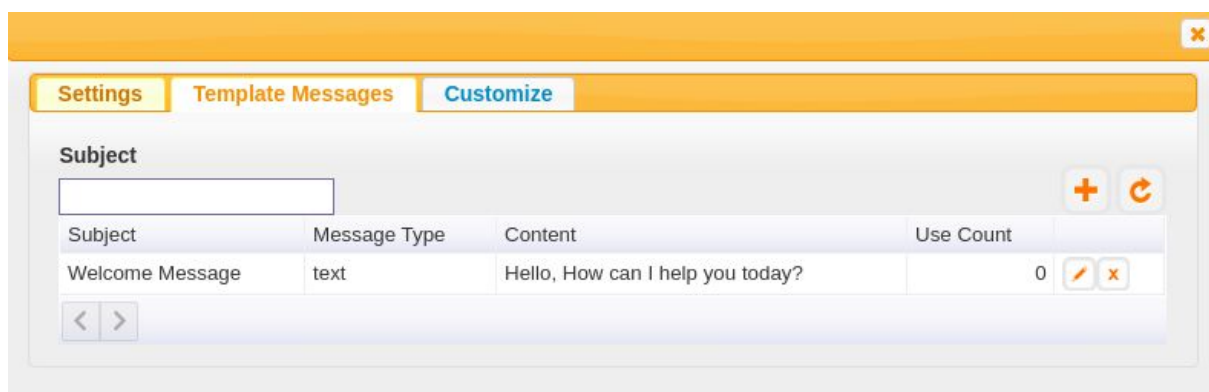


Sorting Priority


7. After all the necessary modifications have been made to the template message, click the save button, **Save**, after a pop-up window shown below will appear:

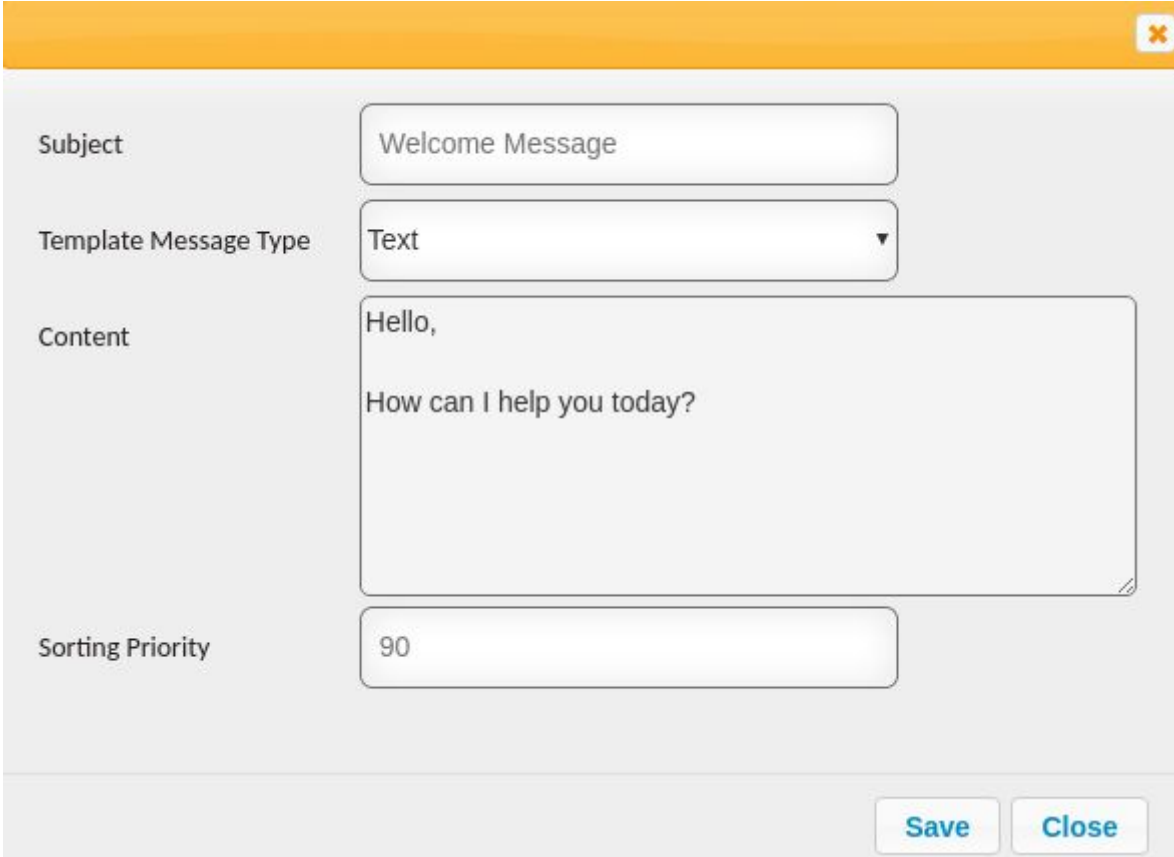


8. Click the Okay button, **Okay**, the created template message will appear in the template message name list as shown below:



Editing a Template Message

1. Click the edit button, , located to the right of the user count column, after clicking the following pop-up window will be displayed:



A pop-up window with an orange header bar containing a close button (X). The window has a light gray background and contains the following fields:

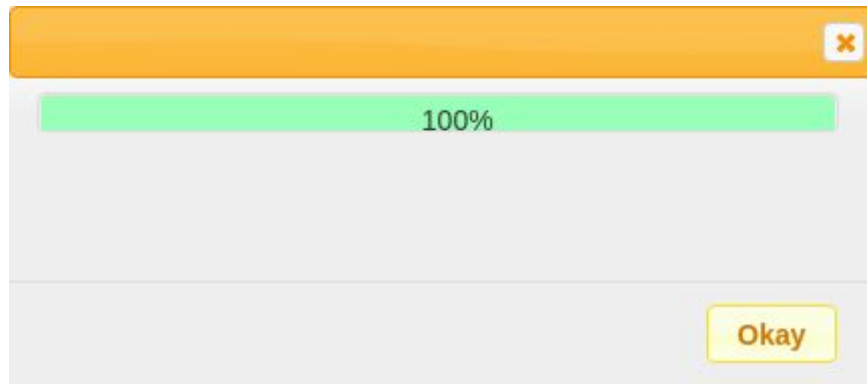
- Subject:** A text input field containing "Welcome Message".
- Template Message Type:** A dropdown menu showing "Text".
- Content:** A large text area containing "Hello," and "How can I help you today?".
- Sorting Priority:** A text input field containing "90".

At the bottom right, there are two buttons: "Save" and "Close".

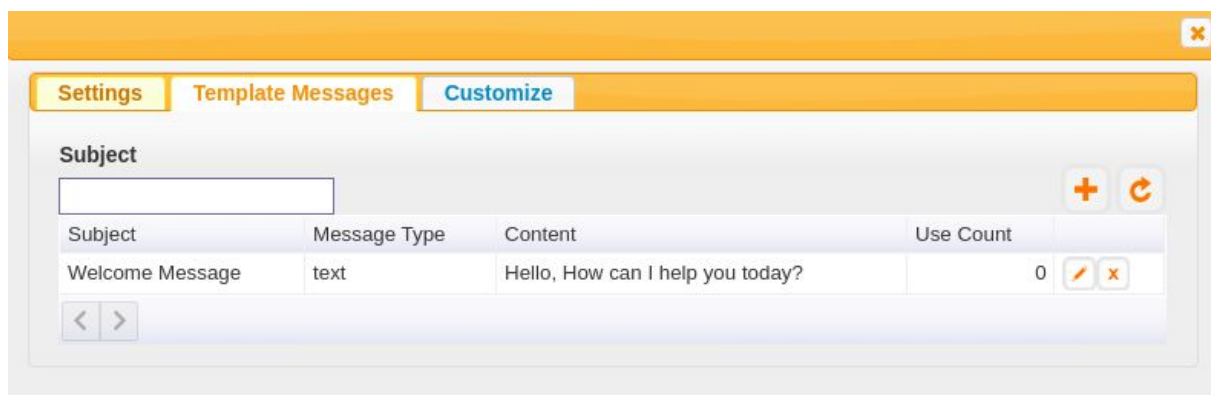
2. Make necessary changes to the template message (*See **Creating a Template Message** section*).

3. After all the necessary modifications have been made to the template message, click


the save button, **Save**, after a pop-up window shown below will appear:

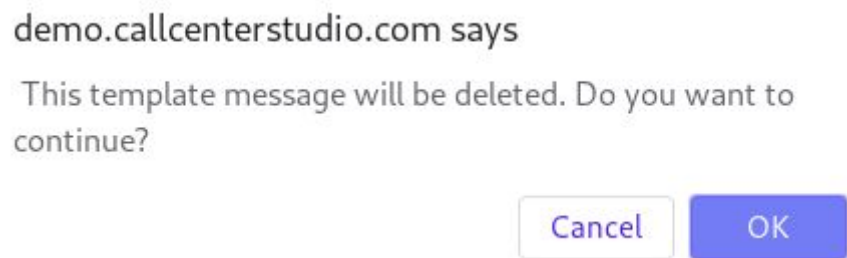




4. Click the Okay button, **Okay**, the edited template message will appear in the template message name list as shown below:



Deleting a Template Message

1. Click the delete button, , located to the right of the edit button. The following pop-up will be displayed:



- Select the cancel button, , to cancel the deletion.
- Select the OK button, , to confirm the deletion.

2. Confirm the deletion by clicking the OK button, .

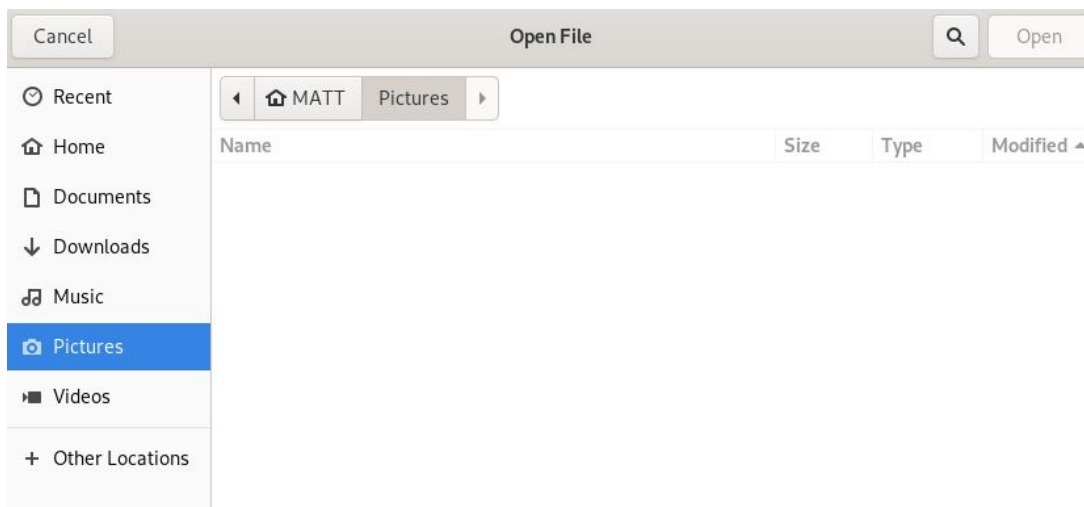
The screen will reload, and the deleted team will not be shown.

Searching for a Template Message

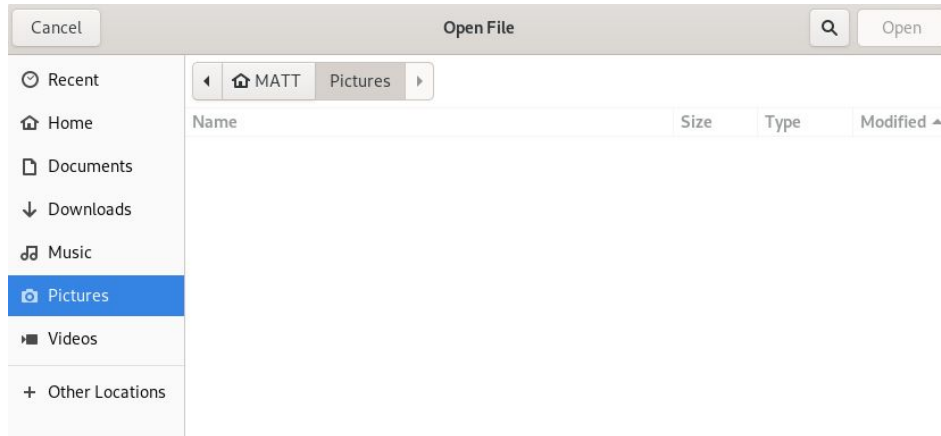
1. Click the “Search:” input box, type part of the subject, to filter the search results until the widget is located.



Creating a Chat Widget (Customize Tab)

1. From the settings tab, select the Customize tab, **Customize**.
2. To add a Widget logo, click the choose file option, **Choose File**, to the right of “Choose Chat Widget Logo,” the desktop folder will pop-up as shown below:



3. Select the desired image for the chat widget logo. JPEG, .PNG, & .JPG are acceptable formats.
4. To add a chat message Avatar, click the “Choose File” option, **Choose File**, to the right of “Choose Chat Message Avatar,” the desktop folder will pop-up as shown below:



5. Select the desired image for the chat message Avatar. JPEG, PNG, & JPG are acceptable formats.
6. If desired, to the right of “Use Agent Profile Avatar,” check the checkbox if desired to use the Agent Profile Avatar.
7. If custom HTML is desired, click the “Customize HTML” type the customized HTML. (Custom HTML: Webchat has a standard interface (two default versions, one customizable). However, a different interface may be desired. Call Center Studio has developed a library of customizable web chat versions that can be prepared, or the Call Center Studio Development team can also make one. The customized interface has an HTML file that needs to be written in this input box.)
8. Click the Save button, , below the “Customize HTML” to save the customized HTML.
9. Click the save button, , to the lower right-hand corner of the pop-up window to save the customize tab.

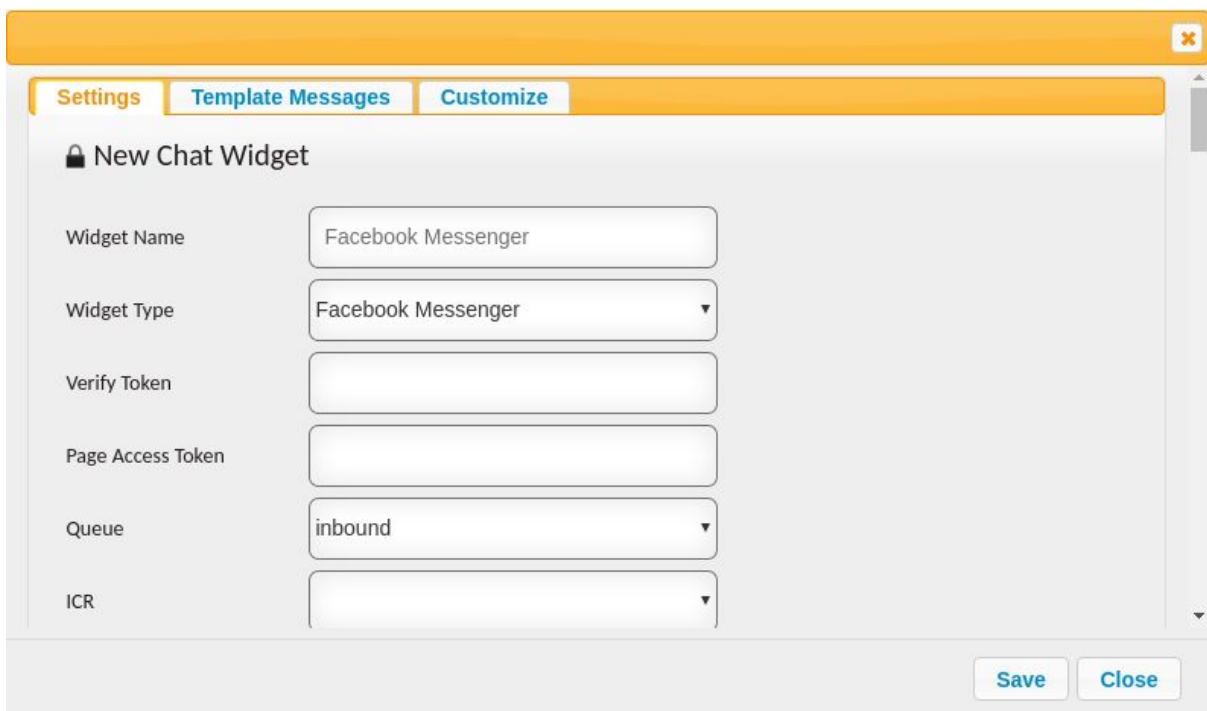
Editing a Chat Widget

1. To edit a chat widget, click the edit button, , located on the far right of the Chat

Widget as shown below:




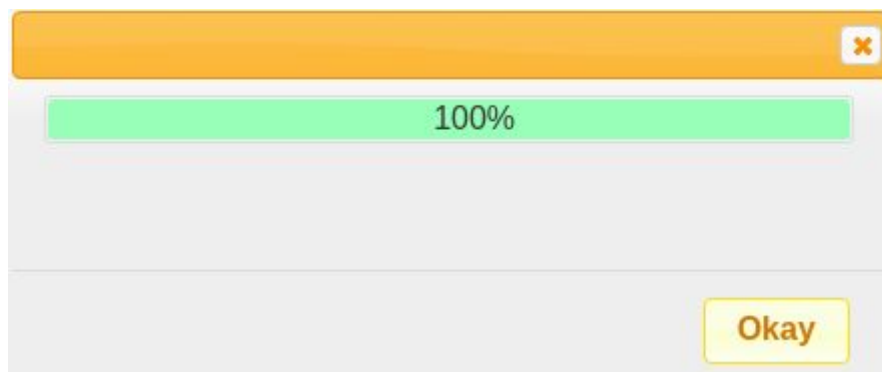
After clicking the edit button, the chat widget pop-up window will appear as shown:



2. Make the following changes and modifications to the chat widget as necessary (See the Creating Chat Widget Sections).

3. Once the desired changes have been completed, the information can be saved by



clicking the save button, , the following pop-up box will appear:

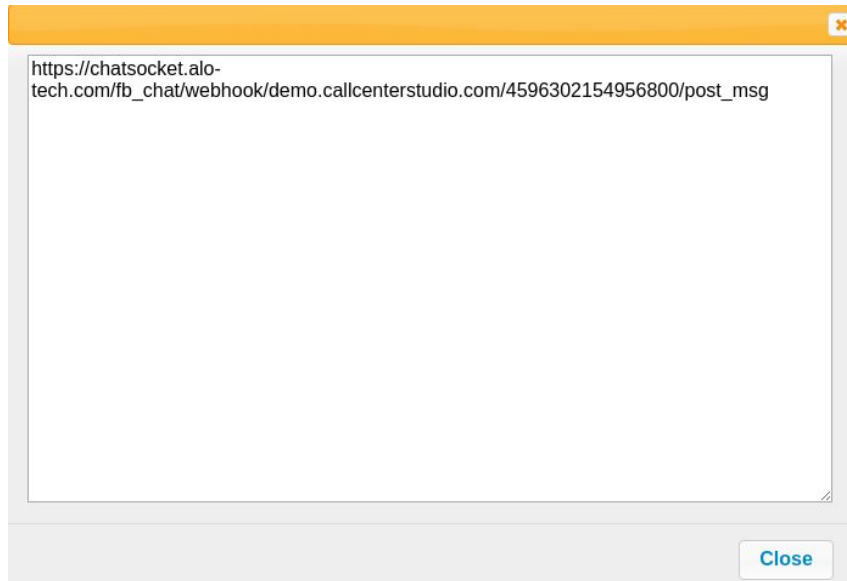


4. Click the Okay button, , to confirm the changes.

Chat Widget URL and Testing the Chat Widget

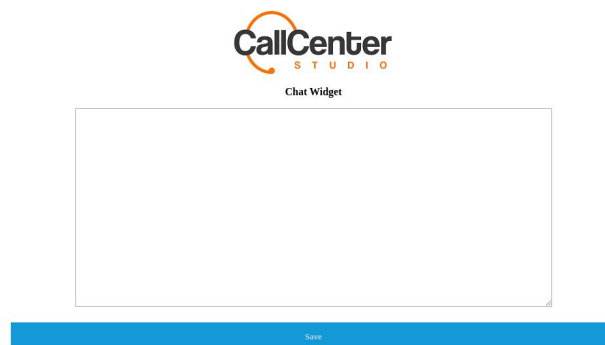
This URL is used for testing the chat widget:

1. To the left of the edit button, , click the show button, , the following pop-up will be displayed:



2. Click inside the window, highlight, and copy the entire URL.
3. Open a new tab using this URL: <http://chat-test.callcenterstudio.com/>.

The following screen will appear:




4. Paste the copied chat URL link into the input box on the chat test page. An example is shown below:



Chat Widget

```
<script type="text/javascript" src="//go-car.callcenterstudio.com/chat/alochat.js?
widget_key=ahRzfml1c3RlcmktaG16bWV0bG9yaXIYXILQ2hhdFdpZGdldHM4YyIC410eDrAoMogEbZ28tY2FyLmN
hbGxjZW50ZXJzdHVkaW8uY29t"></script>
<script type="text/javascript">
  startWidget();
</script>
```

Save

5. Click the save button, . The following will appear in the lower right-hand corner:



6. Click the green dot. The chat window will be displayed. An example is shown below:

Live Support

Name Surname

Email

Phone Number

Start Chatting

7. Fill out the Name Surname, Email (If optional was not checked), Phone Number (If optional was not checked)

-
- Click the Start Chatting button, , to begin testing the chat.

Searching for a Chat Widget

Name

- Click the “Name” input box, type the chat widget’s name, as shown below:

A screenshot of a web interface showing a search for chat widgets. On the left, there is a light gray rectangular box with the word "Name" in a light gray font. To the right of this box is a white input field with a thin gray border. Inside the input field, the text "Facebook Messenger" is typed, followed by a vertical cursor.

Note: Partial names can be used, when spelled correctly.