


Incoming Chat

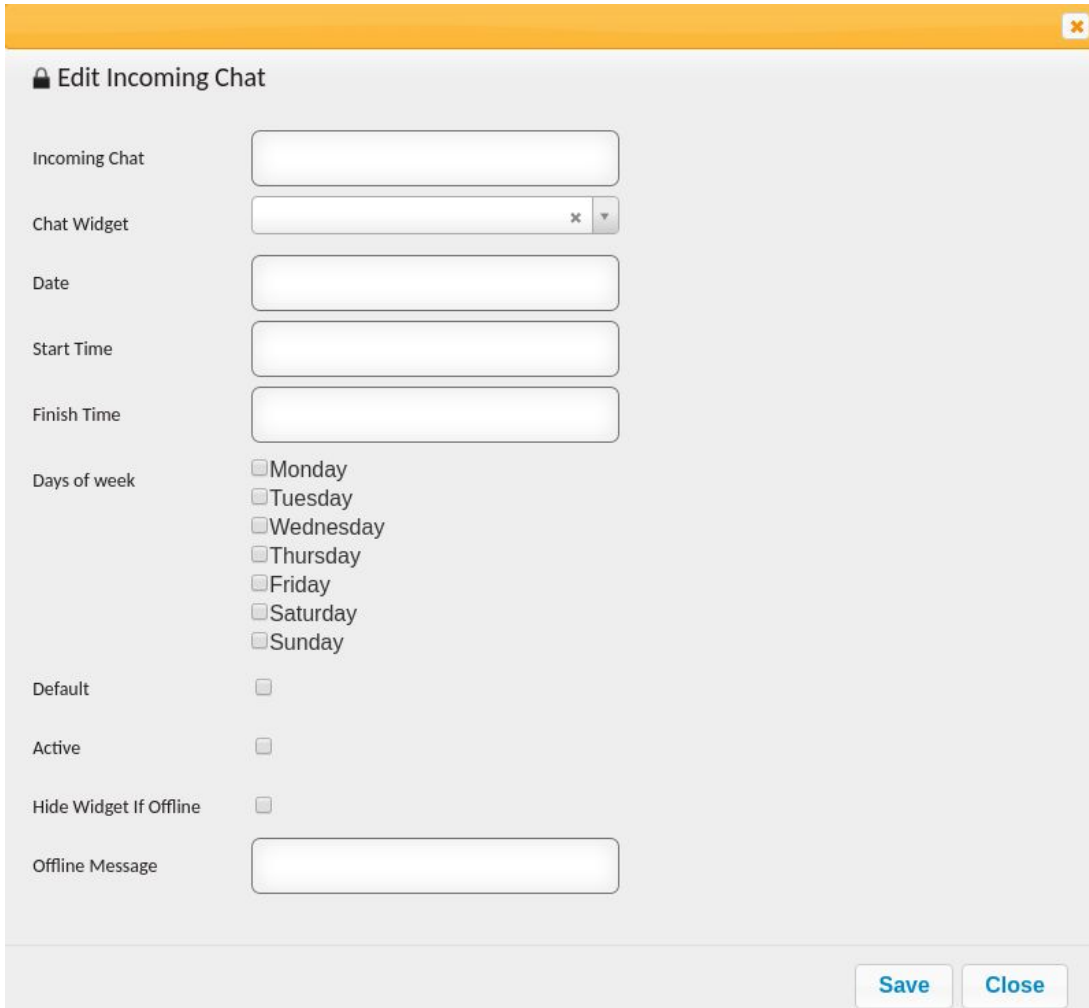


All chats need an incoming chat associated with them. This section is to activate the chat and, if desired, create time constraints when the chat is in use.

Creating an Incoming Chat

1. Click the New button, , located in the top right corner of the incoming chat screen.

The following pop-up screen will appear, as shown below:

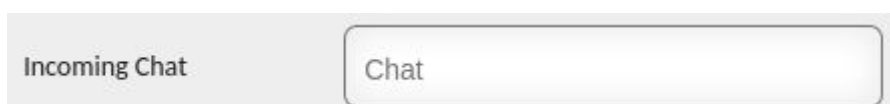


The screenshot shows a pop-up window titled "Edit Incoming Chat" with a close button in the top right corner. The window contains the following fields and options:

- Incoming Chat: Text input field
- Chat Widget: Dropdown menu with a close button (x) and a dropdown arrow (v)
- Date: Text input field
- Start Time: Text input field
- Finish Time: Text input field
- Days of week: A list of days with checkboxes: Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, Sunday
- Default:
- Active:
- Hide Widget If Offline:
- Offline Message: Text input field

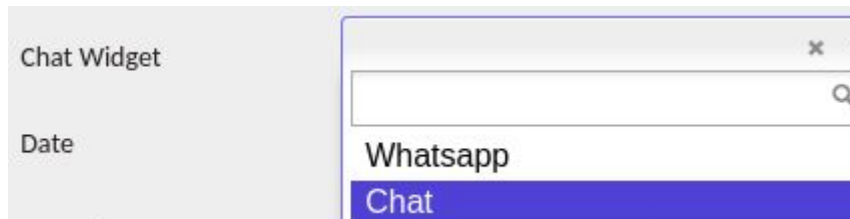
At the bottom right of the window are two buttons: "Save" and "Close".

2. Click the "Incoming Chat" input box, type the desired incoming chat name as seen below:

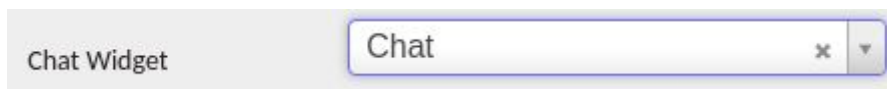


A close-up of the "Incoming Chat" input field. The text "Incoming Chat" is displayed on the left, and the input box contains the text "Chat".

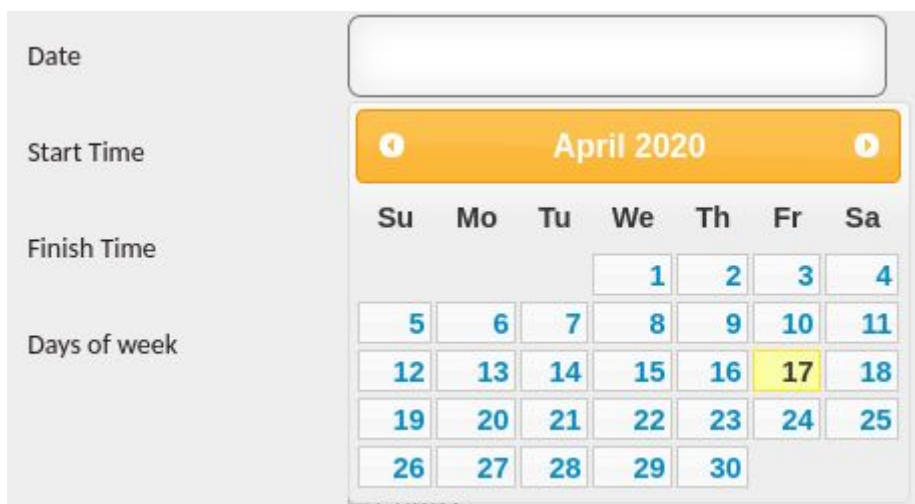
3. Click the “Chat Widget” input box, a dropdown of created chat widgets will appear (See **Chat Widgets > Creating a Chat Widget** section for details on creating a chat widget) as shown below:



4. Select the desired chat widget; an example is displayed below:



5. Click the “Date” input box. A calendar pop-up will appear to facilitate accurate date selection, as shown below:

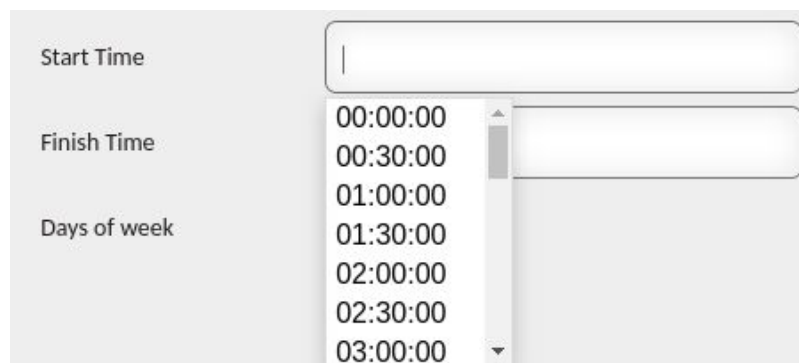


6. Select the desired date; an example is displayed below:



A screenshot of a user interface showing a date selection field. The label "Date" is on the left, and the input box contains the text "2020-04-01".

7. Click the “Start Time” input box. A dropdown list will appear to facilitate accurate start time selection, as shown below:



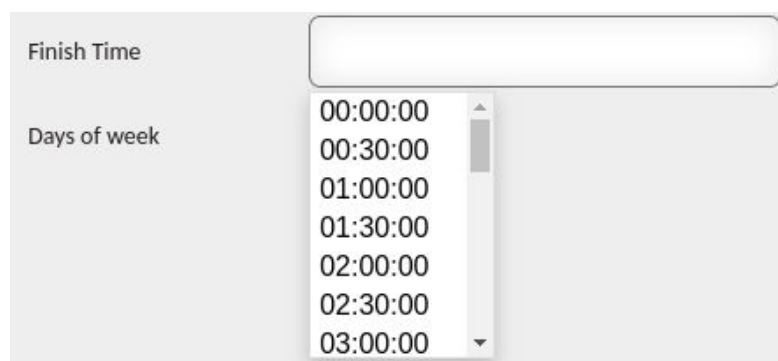
A screenshot of a user interface showing a "Start Time" input box with a dropdown menu open. The dropdown list contains the following time options: 00:00:00, 00:30:00, 01:00:00, 01:30:00, 02:00:00, 02:30:00, and 03:00:00. Below the dropdown, there are labels for "Finish Time" and "Days of week" next to empty input boxes.

8. Select the desired start time; an example is displayed below:



A screenshot of a user interface showing a "Start Time" input box with the text "06:00:00" entered.

9. Click the “Finish Time” input box. A dropdown list will appear to facilitate accurate finish time selection, as shown below:



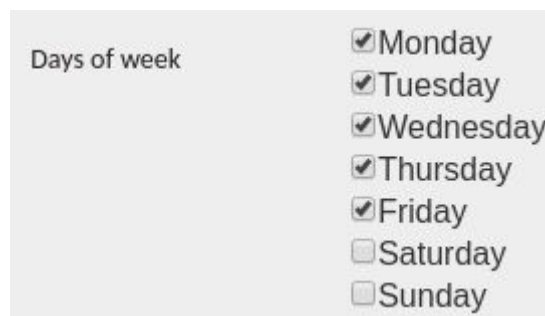
A screenshot of a user interface showing a "Finish Time" input box with a dropdown menu open. The dropdown list contains the following time options: 00:00:00, 00:30:00, 01:00:00, 01:30:00, 02:00:00, 02:30:00, and 03:00:00. Below the dropdown, there is a label for "Days of week" next to an empty input box.

10. Select the desired finish time; an example is displayed below:



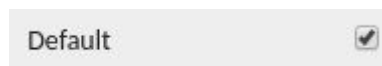
A screenshot of a user interface element. On the left, there is a light gray rectangular box with the text "Finish Time" in a dark gray font. To the right of this box is a white rounded rectangular input field with a thin gray border, containing the text "22:00:00".

11. In the days of the week section, Select the checkboxes for the days of the week that the incoming chat will appear on the agent’s screen, an example is displayed below:



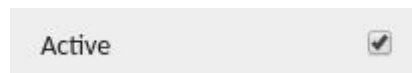
A screenshot of a user interface element. On the left, there is a light gray rectangular box with the text "Days of week" in a dark gray font. To the right of this box is a list of days of the week, each with a checkbox. The days and their checkbox states are: Monday (checked), Tuesday (checked), Wednesday (checked), Thursday (checked), Friday (checked), Saturday (unchecked), and Sunday (unchecked).

12. If the desired the “Default” box can be checked to allow the chat to make the following incoming chat rules the default:



A screenshot of a user interface element. It consists of a light gray rectangular box with the text "Default" in a dark gray font on the left and a checked checkbox on the right.

13. Check the “Active” checkbox. The checkbox needs to be selected for the chat to be used as shown below:

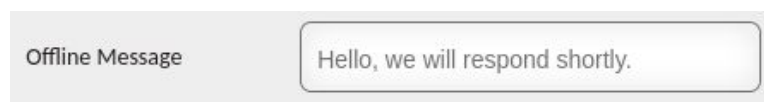



A screenshot of a user interface element. It consists of a light gray rectangular box with the text "Active" in a dark gray font on the left and a checked checkbox on the right.

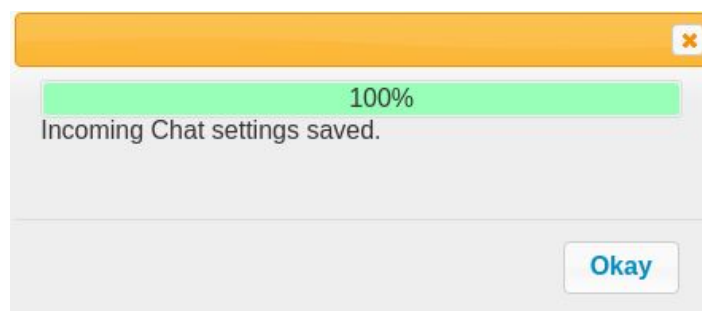
14. Check the “Hide Widget if Offline” checkbox to hide the incoming chat widget if offline. When the chat widget is embedded in a website, the chat icon will not appear for visitors if there are no available agents) as shown below:




15. Click the “Offline Message” input box (offline messages are only used if the “Hide Widget if Offline” checkbox is selected) type an offline message an example is shown below:




16. After all the desired additions have been made, click the save button,  , the following pop-up window will appear:



17. Click the Okay button,  , to acknowledge the addition. The new incoming chat will be located in the Incoming Chat list as seen below:

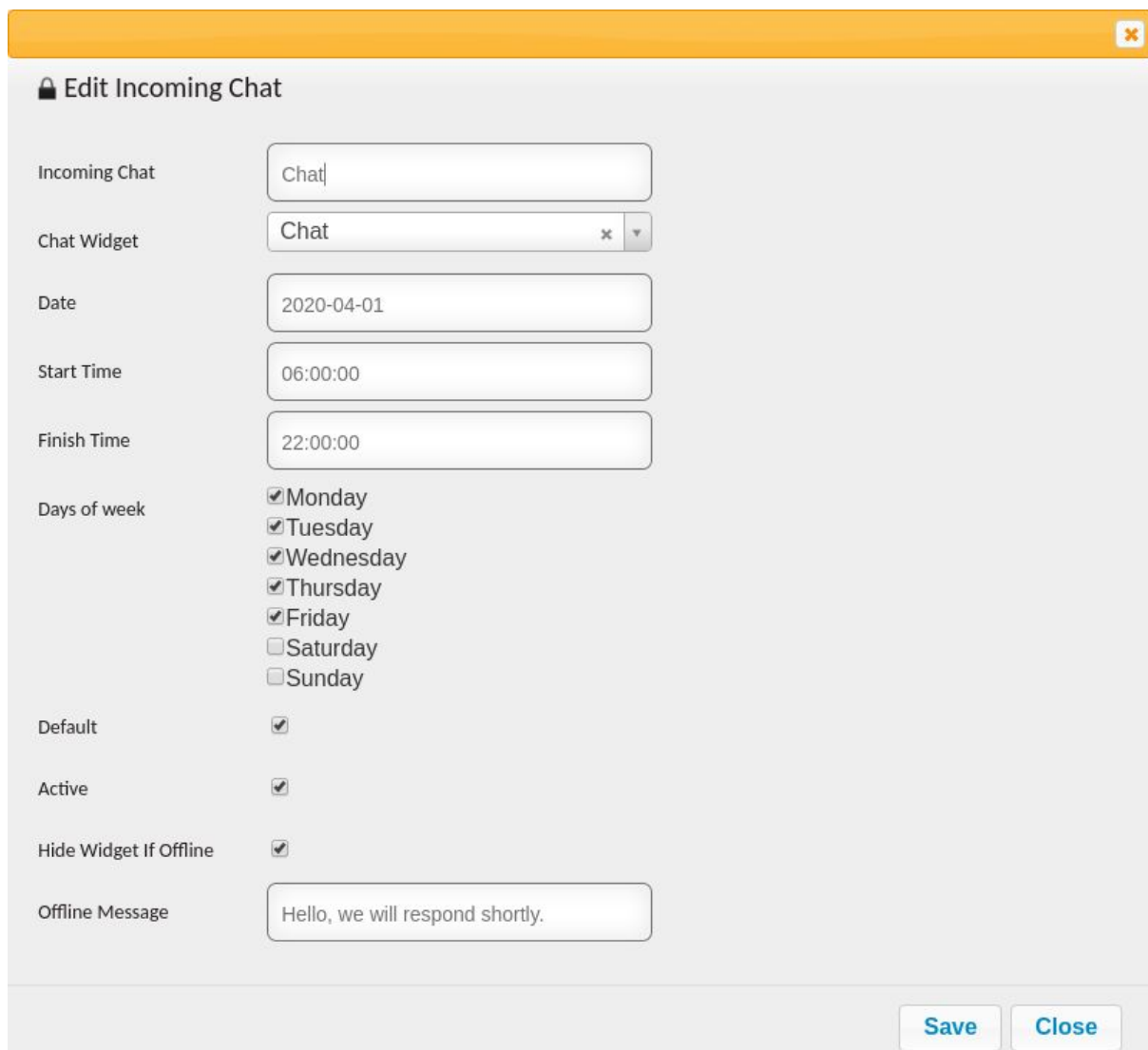


Editing an Incoming Chat

1. To edit an Incoming Chat, click the edit button,  , located on the far right of the Incoming Chat Name after the “Active Column” as shown below:



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




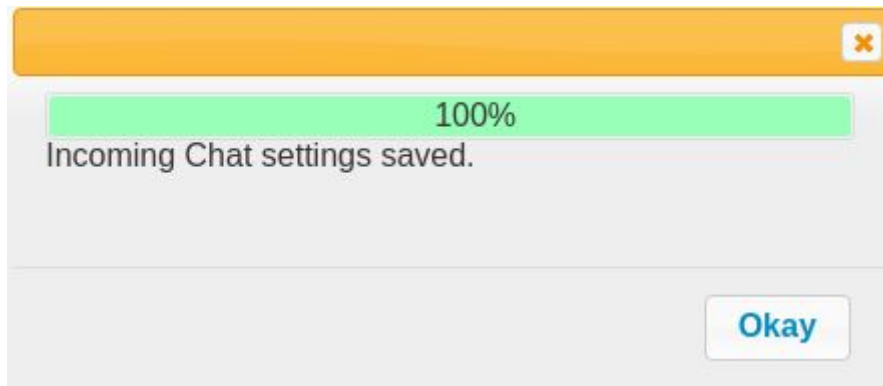
The screenshot shows a pop-up window titled "Edit Incoming Chat" with a close button in the top right corner. The window contains the following fields and options:

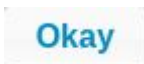
- Incoming Chat:** Text input field containing "Chat".
- Chat Widget:** Dropdown menu showing "Chat" with a close button and a dropdown arrow.
- Date:** Text input field containing "2020-04-01".
- Start Time:** Text input field containing "06:00:00".
- Finish Time:** Text input field containing "22:00:00".
- Days of week:** A list of days with checkboxes: Monday, Tuesday, Wednesday, Thursday, Friday (all checked), Saturday, and Sunday (unchecked).
- Default:** Checkmark.
- Active:** Checkmark.
- Hide Widget If Offline:** Checkmark.
- Offline Message:** Text input field containing "Hello, we will respond shortly."

At the bottom right of the window are two buttons: "Save" and "Close".



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

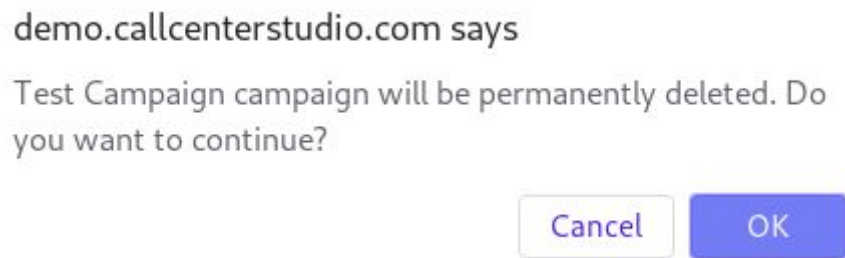
clicking the save button, , the following pop-up box will appear:


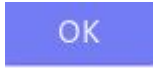


4. Click the Okay button, , to confirm the changes.

Deleting an Incoming Chat

1. From the Incoming Chat Name list, click the delete button, , to the right of the edit button, . When the delete button is clicked the following pop-up will appear:



- 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 incoming chat will not be shown.

Searching for an Incoming Chat

1. Click the “Incoming Chat” input box, type the incoming chat’s name as shown below:

A screenshot of a software interface showing a search input field. The field is a light gray rectangle with rounded corners. On the left side of the field, the text "Incoming Chat" is displayed in a light gray font. On the right side, there is a white input box with a thin gray border containing the text "Chat" in a black font. A vertical cursor is visible at the end of the text "Chat".

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