LIVE CHAT SUPPORT
by SOCIALINTENTS

Help Guide

Try our live chat!

Questions? Chat with us - we're here to help!

Your Name *

Your Email *

Your Question

Start Chat

This guide is to help you get started with Live Chat Support. If you have any additional questions after reading this guide, please chat with us at www.socialintents.com or email us at support@socialintents.com.

Contents

Getting Started

Your first step to integrating live chat into your site is to sign up for a Social Intents account and create a Live Chat Widget. After logging in the first time, click on the Live Chat image to create your first widget.
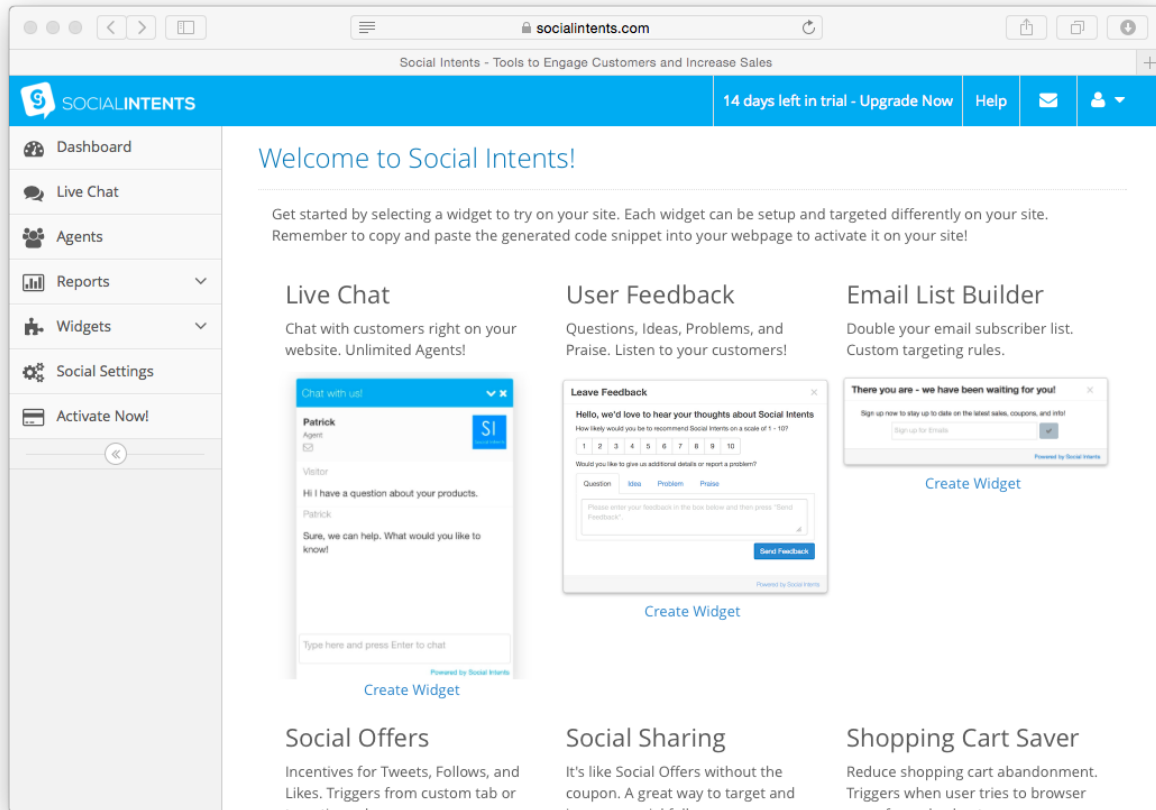
Next, you'll see the default Live Chat settings page. You can go ahead and customize text and options then click Save at the bottom of the page.
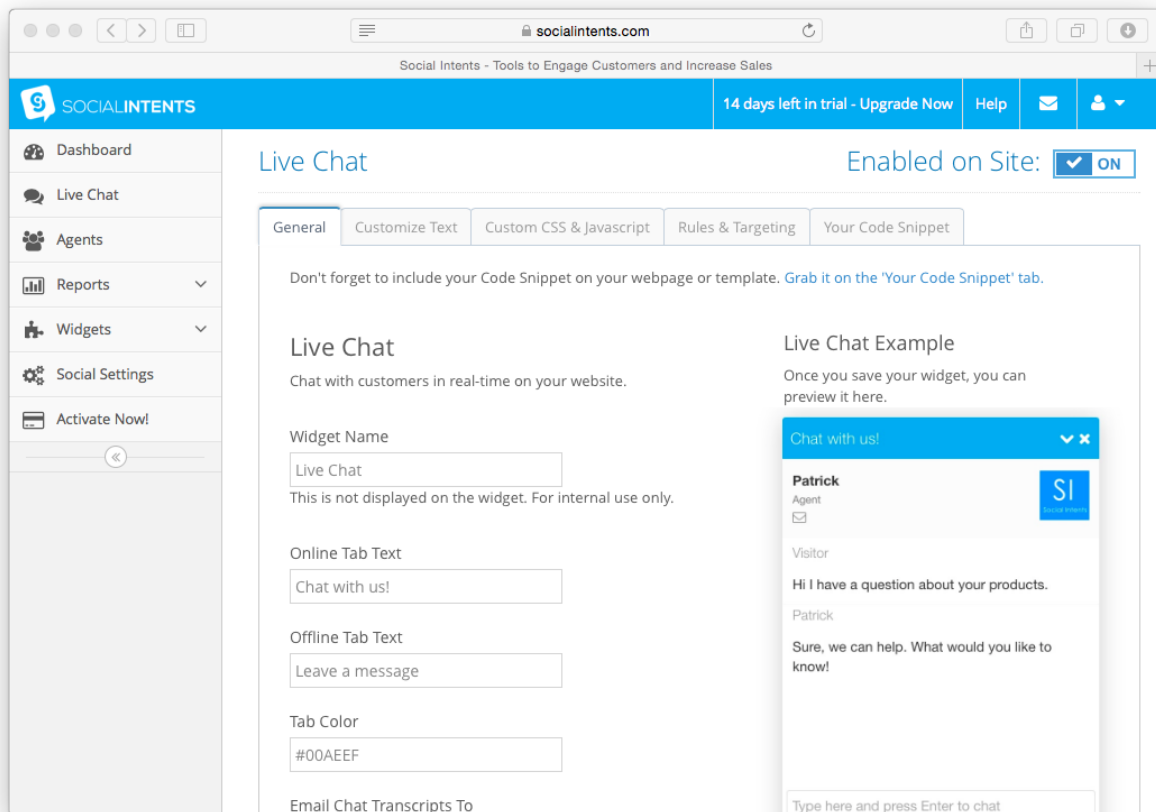
After saving the settings the first time, we'll generate a code snippet that you can include in your web page. You'll see this on the "Your Code Snippet" tab under your widget settings.

Including Code Snippet in your Web Page

To include the code into any html page or template, simply copy and paste the code right before the closing </body> tag of your page or template. For certain platforms you may not be able to do this, anywhere inside the body of the html page should work fine.

```html
<html>
    <head>
        <title>My Great Website</title>
    </head>
    <body>
        <div>Your Body Content</div>
        <!-- Your HTML Code Snippet included directly in your html, .net, or jsp page -->

        <!-- Social Intents www.socialintents.com -->
        <script type='text/javascript'>
        var socialintents_vars_chat ={/*Modify the variables below to customize*/
        'widgetId':'2c9f8d874d33a261014d35223200fd',
        'type':'chat',
        'tabLocation':'bottom',/*Tab location: top, bottom*/
        'tabText':'Chat with us!',/*Text to display on the tab*/
        'tabOfflineText':'Leave a message',
        'tabWidth':'260px',/*width of tab in pixels*/
        'marginTop':'120px',
        'marginRight':'60px', /*margin from right side for tab.  Use marginRight or marginLeft*/
        'tabColor':'#00AEEF',/*color of the tab image*/
        'urlPattern':'', /*urls on which to activate the widget*/
        'sil':'f',
        'headerTitle':'Chat with us!'};
        (function() {function socialintents(){
            if (socialintents_vars_chat.sil ==='t') return;socialintents_vars_chat.sil = 't';
            var siJsHost = (('https:' === document.location.protocol) ? 'https://' : 'http://');
            var s = document.createElement('script');s.type = 'text/javascript';s.async = true;s.src = siJsHos
            var x = document.getElementsByTagName('script')[0];x.parentNode.insertBefore(s, x);
         };
        if (window.attachEvent)window.attachEvent('onload', socialintents);else window.addEventListener('loa
        })();
        </script>
    </body>
</html>
```
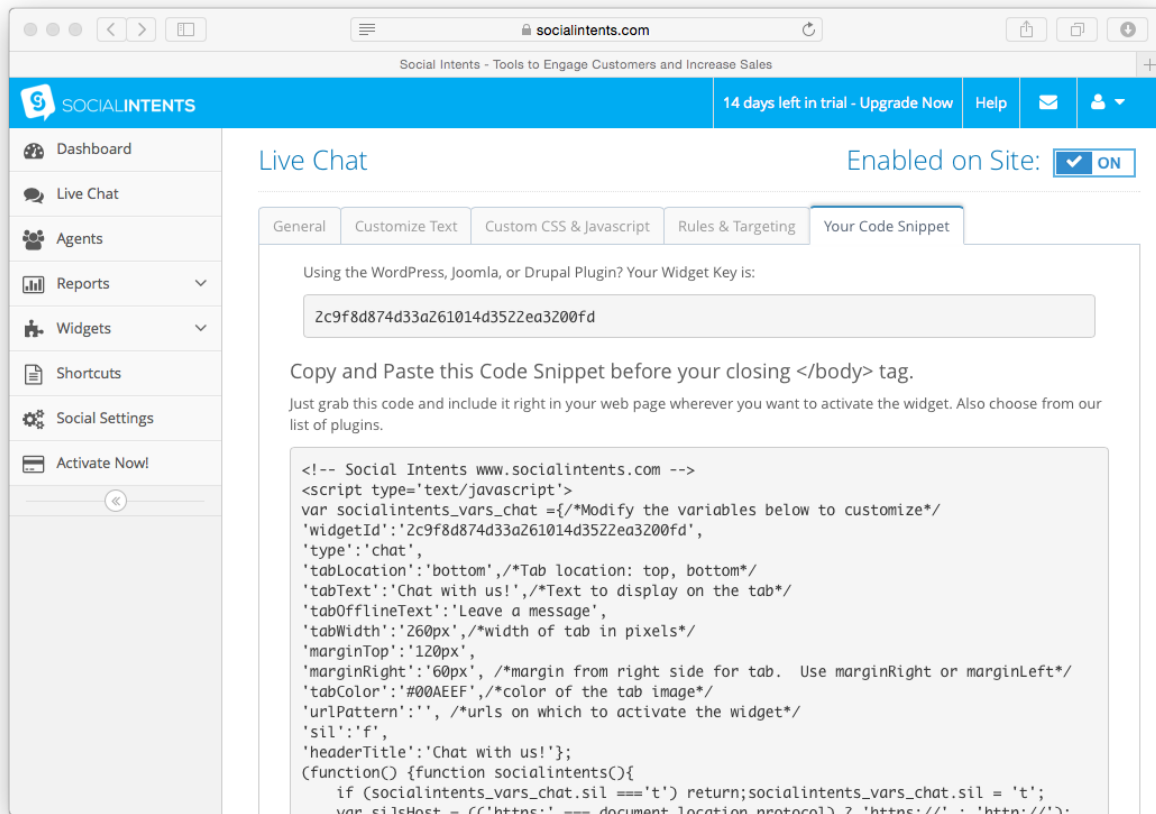
Wordpress Plugin Users

If you are using the Wordpress plugin, you have likely signed up right from the plugin. You can update your settings right from the plugin. For advanced settings, you can make changes on our website. Your settings will stay in sync between the plugin and our servers after you make updates to either one.

If you're using a plugin, **you do not need to include any code snippet into your template**. Simply copy the Widget Key into the plugin settings.

Your Widget Key
You can find your Live Chat Key under the "Your Code Snippet" tab. Simply copy this key into your plugin settings to activate the plugin on your site.

Start Chatting

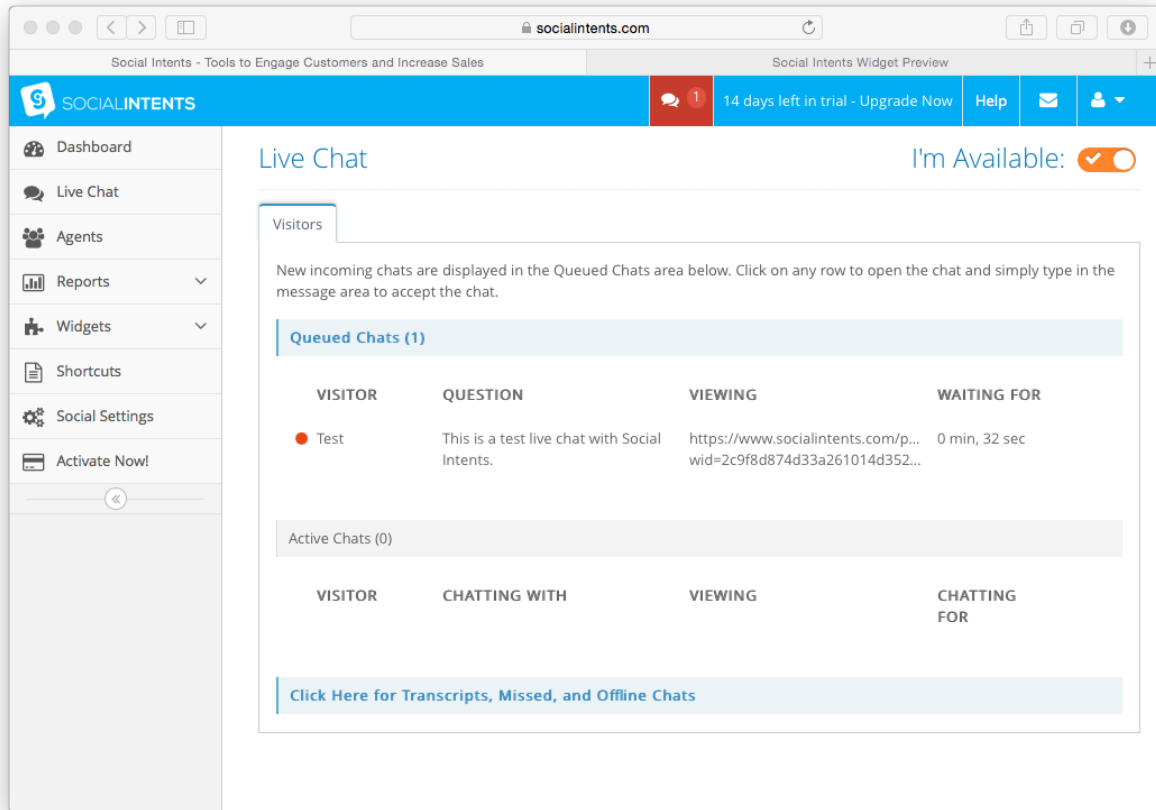## The Live Chat Console
You can chat with your website visitors right from your Live Chat console.

The first time you click on Live Chat in your browser, you'll be prompted with whether to accept Notifications. Make sure you answer yes so that you can receive live chat notifications right on your desktop as popup notifications. Desktop notifications are supported on Chrome, Firefox, and Safari.
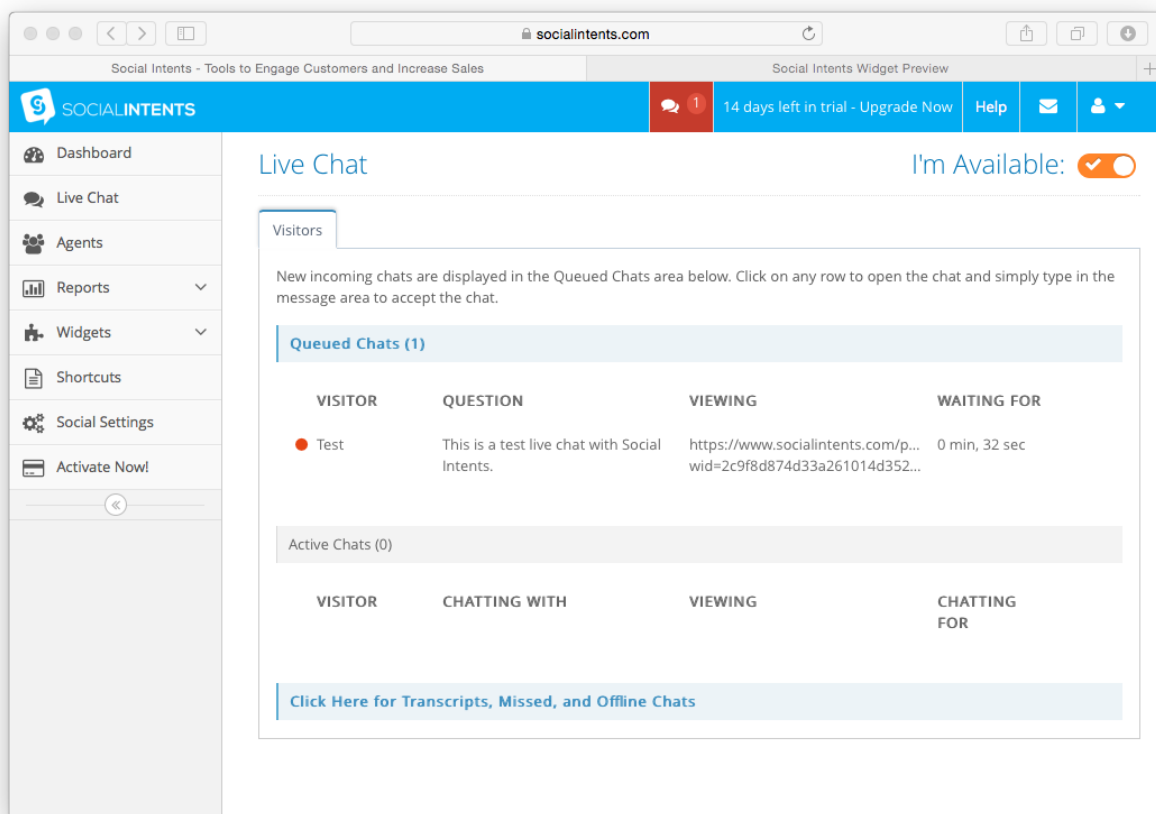
Answering Chats

You will receive inbound notifications of new chats right in your live chat console as long as you're logged into Social Intents in your browser. It can be hidden, in another tab, or minimized and you'll still get the notifications. A good practice is to login once in the morning and keep the tab open. You'll still see and hear inbound chat requests even if that window is not active.

After you click on a row, a new tab will open with the chat you selected. Just type text into the message area and hit Enter to accept the chat and start a conversation with your website visitor.
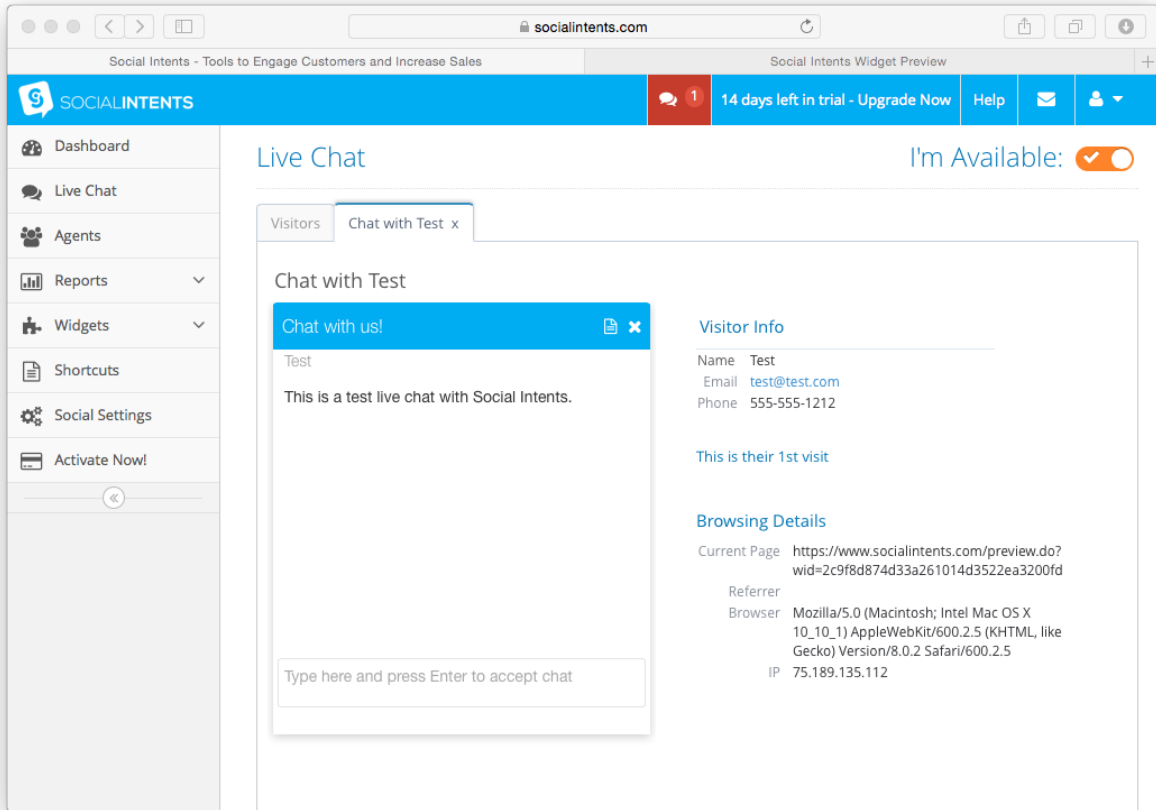
Chat Notifications

We support a variety of chat notifications including HTML5 desktop notifications, email notifications, and mobile push notifications using the pushover.net mobile app.

Desktop Push Notifications

The first time you login from Safari, Firefox, or Chrome, you will be asked if you'd like to show notifications from www.socialintents.com. Select "Show for this session". This allows us to use the browsers desktop notifications to push messages to you. Even when your browser is minimized, as long as you are logged into our site, you will receive the incoming notifications as a desktop notification. Simply click the inbound notification to open the chat.

Email Notifications

You can also enable email notifications under your Agent Settings notifications area. We will send an email to you every time there is an inbound chat request.

If you're often away from your computer, we have a setting under your Agent settings called "Stay Available Even When Not Logged In". Be sure to enable this option if you want your Live Chat to stay online even when you're not logged into our website. That way, you can receive an email of any incoming requests. You just click on the Open Chat button in the email to go right to that chat. You can even do this from your mobile phone!
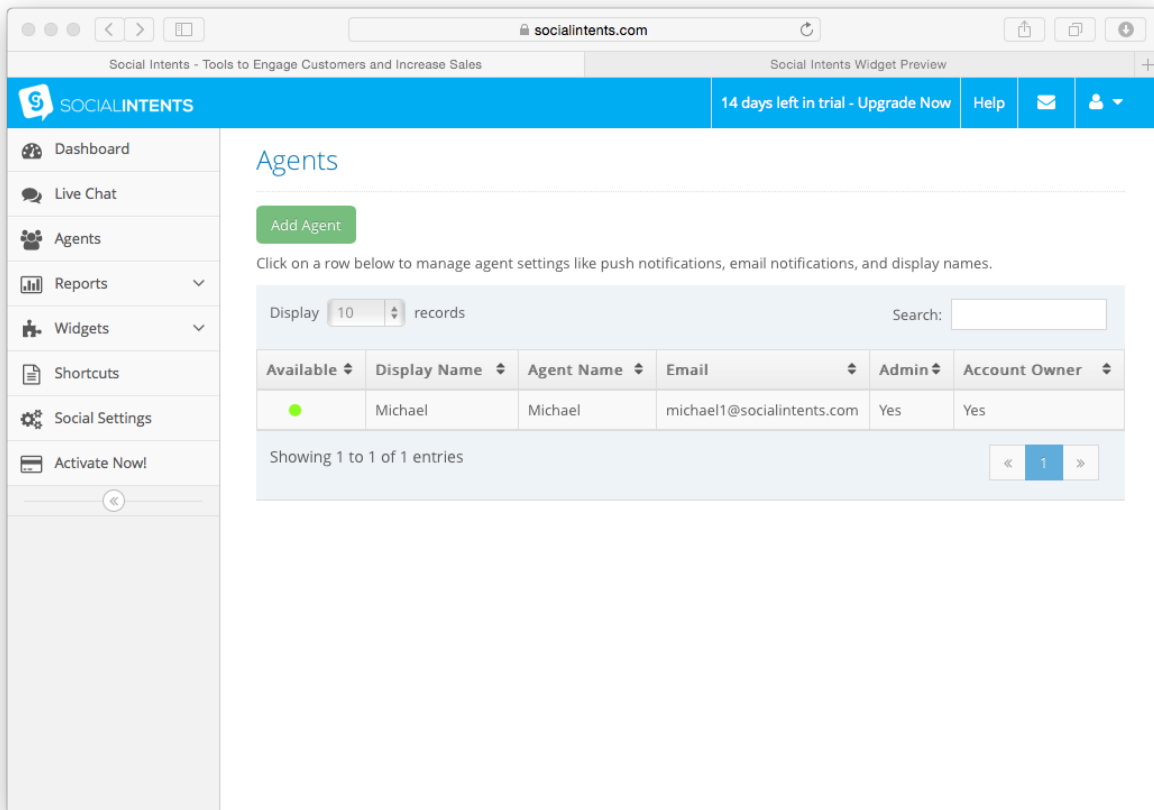
Mobile Push Notifications with Pushover.net

If you want to chat from your mobile phone and need immediately inbound notifications, we suggest downloading the Pushover.net mobile app.

Once you sign up, they email you their Pushover User Key.

Simply go to your Agent settings → Notifications and choose "Enable Live Chat Mobile Push Notifications". Copy/paste this key into the Pushover User Key text field.

You'll receive a mobile push notification right to your phone for every new chat request. Just click the link the notification to open the chat right on your phone. This is a great way to ensure you'll never miss a chat.

To enable the mobile push notifications, select "Enable Live Chat Mobile Push Notifications" then copy your Pushover User Key into the Pushover User Key text field.
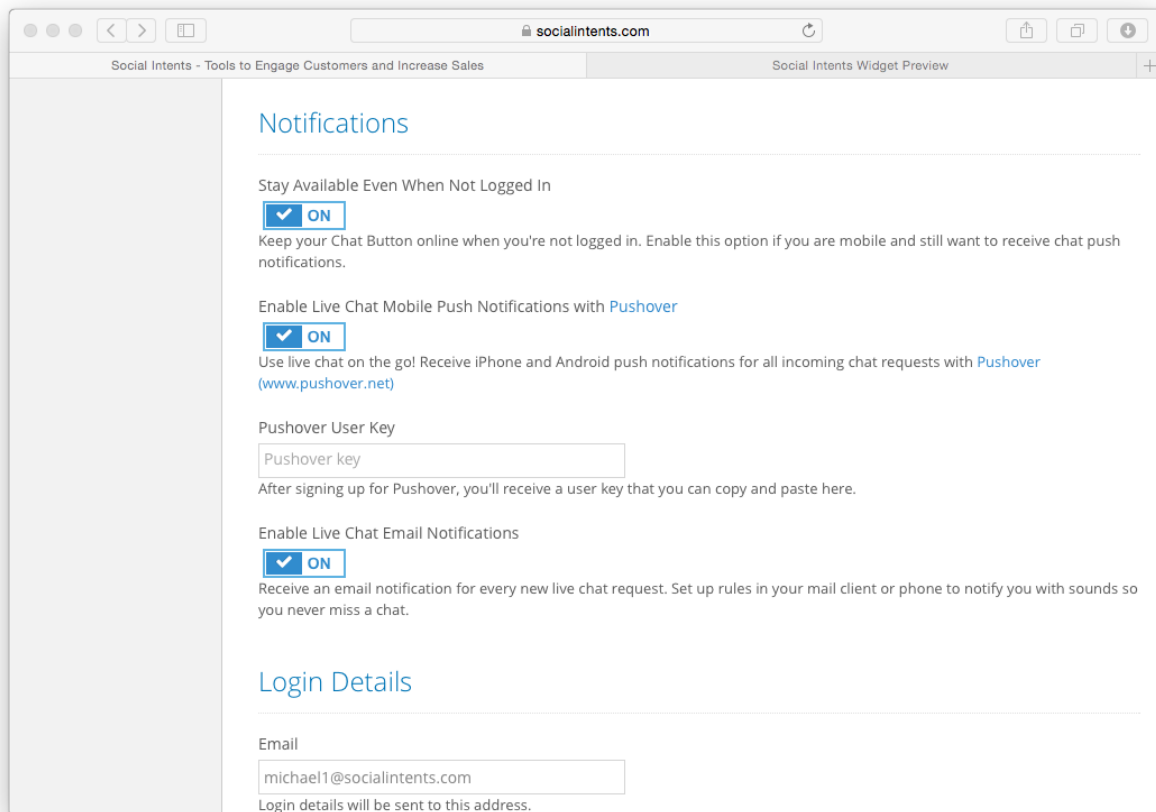
Configuring your Chat Box

Online and Offline Text

The online and offline text fields are the text that is displayed on the chat tab. Modify these to grab the visitors attention or for your specific needs.

When changing either of these items, you have to re-include the generated code into your web page.
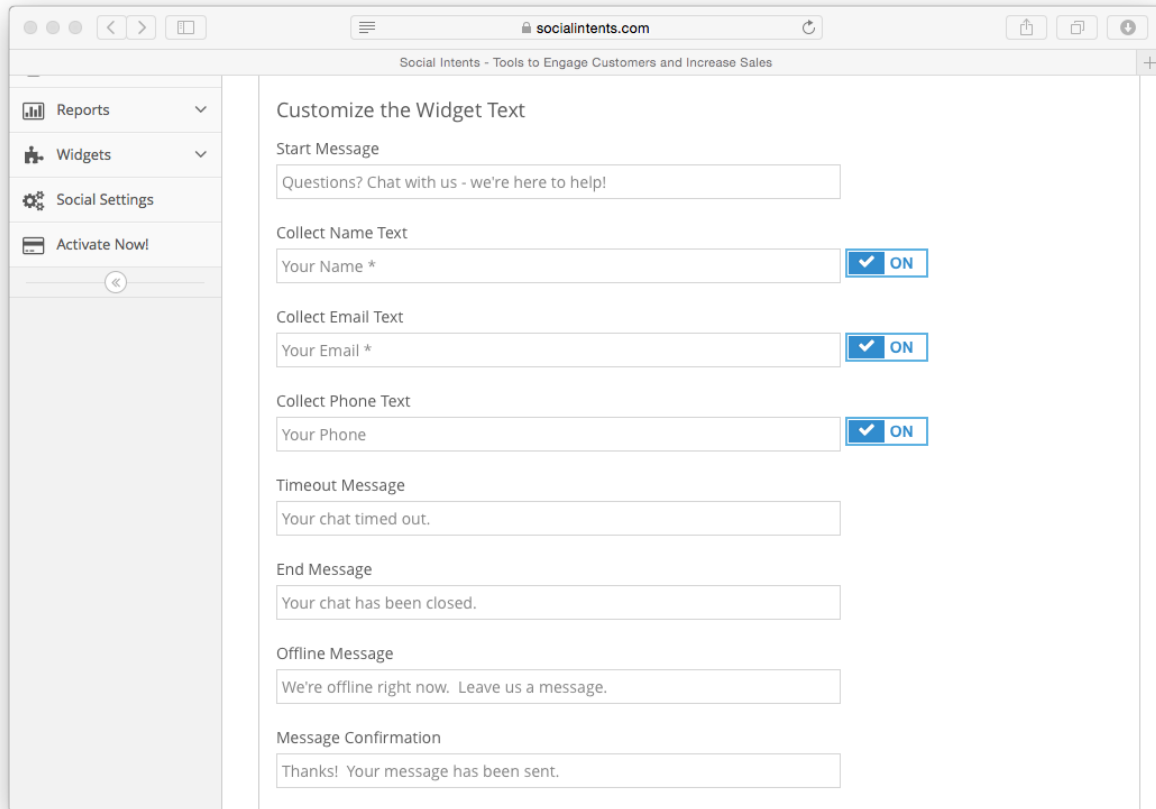
Tab Color

You can change the tab color to any hex color to match your branding. Please note that after changing the tab color, you'll also have to re-include the code snippet into your html page.

Just a note, you can change the other settings on the fly and not have to re-generate the code snippet.
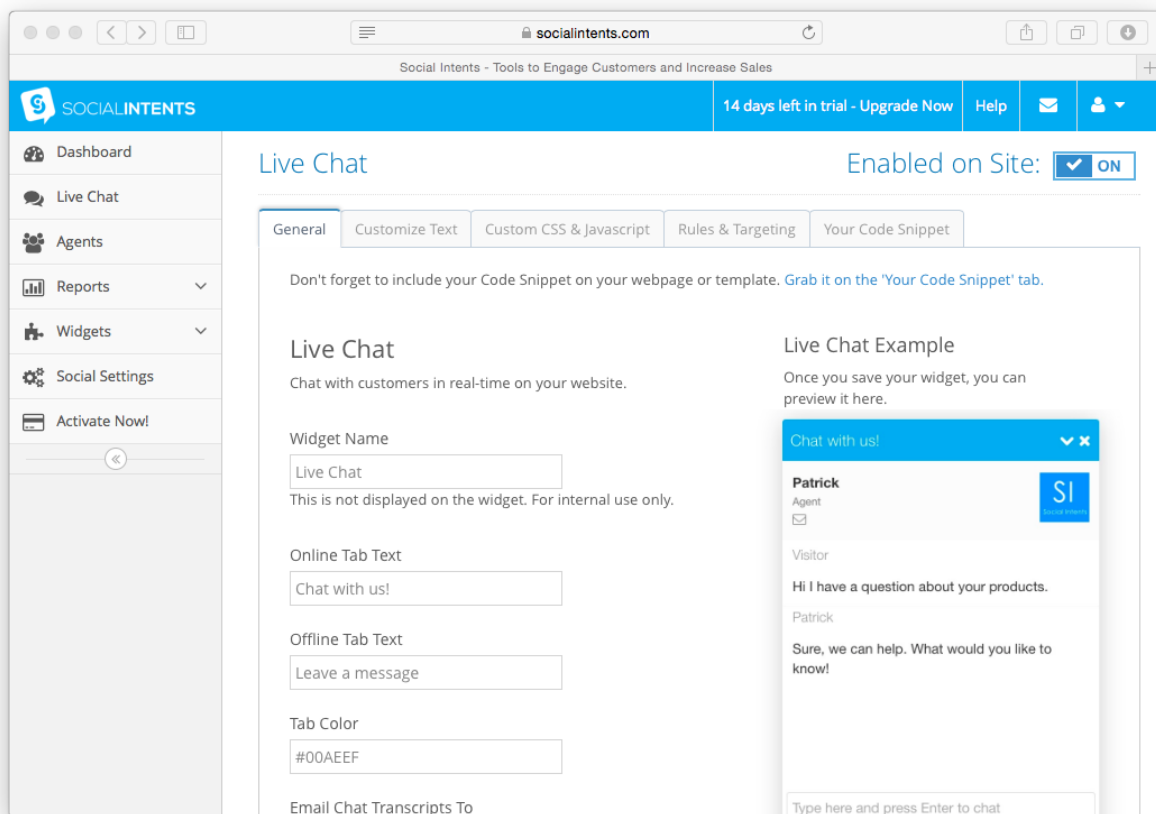
Customize Text and Multiple Language Support

You can customize every single field name, text, and message that is displayed in your live chat. This level of customization is what sets our live chat apart. Customize the text for your brand, or translate it for your language.
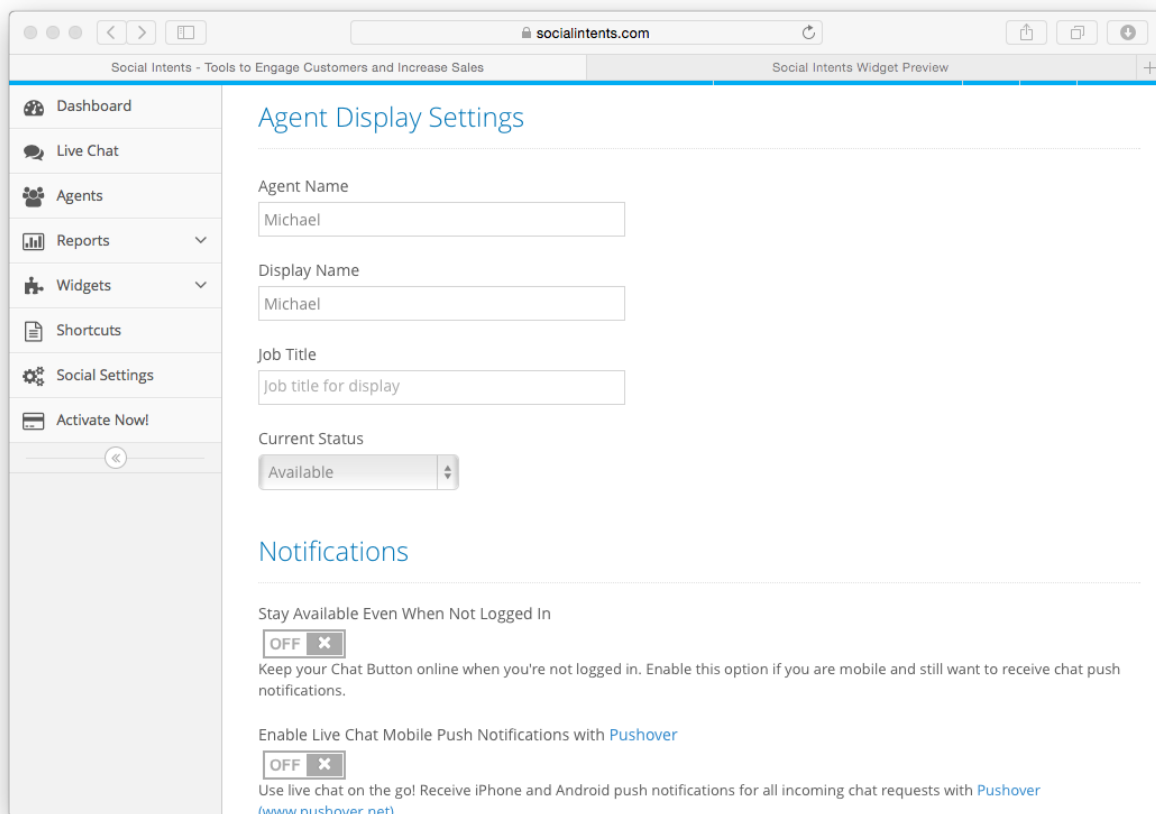
Setting up an Agent

We make it easy to set up your entire team as agents. Each agent has their own info, display name, and credentials to login to our site and answer chats. As an Administrator, you can monitor all active chats and even help agents answer questions.

Agent Name: This is for internal use only and used as an agents real name

Display Name: The display name is what is show the website visitor when chatting.

Job Title: The job title is the subtext that displays under and agent name to the visitor when a chat begins. Use this for an agent role or position (or whatever other creative text you can think of).

Current Status: Whether the agent is online or offline. You can force someone online or offline here by changing this field.

Notifications: Use the Notifications area of the Agent Details to configure how the agents will be notified of new chat request, either Email or Native Mobile Push.

Stay Available Even When Not Logged In: Enable this option if you always want your chat tab online and you typically answer chats from Email or Push. This will have the effect of keeping the Chat Tab online as long as this option is chosen.

Online and Offline Availability

You have complete control over when your chat tab is online or offline. These are controlled by your Agent Availability in the Live Chat Console.

When you open the Dashboard, you are automatically made Available by default.

With Multiple Agents

With multiple agents, if at least one of you are Available, then the chat widget will be online. If you want to force the chat widget offline, change your status to Unavailable. For multiple agents, you can click on the Agents tab, and select each individual agent and force them offline.

Missed and Offline Messages

We store all missed and offline messages right in our app so you never miss them. Use the History link to search on and view all chat transcripts, missed, and offline chats.
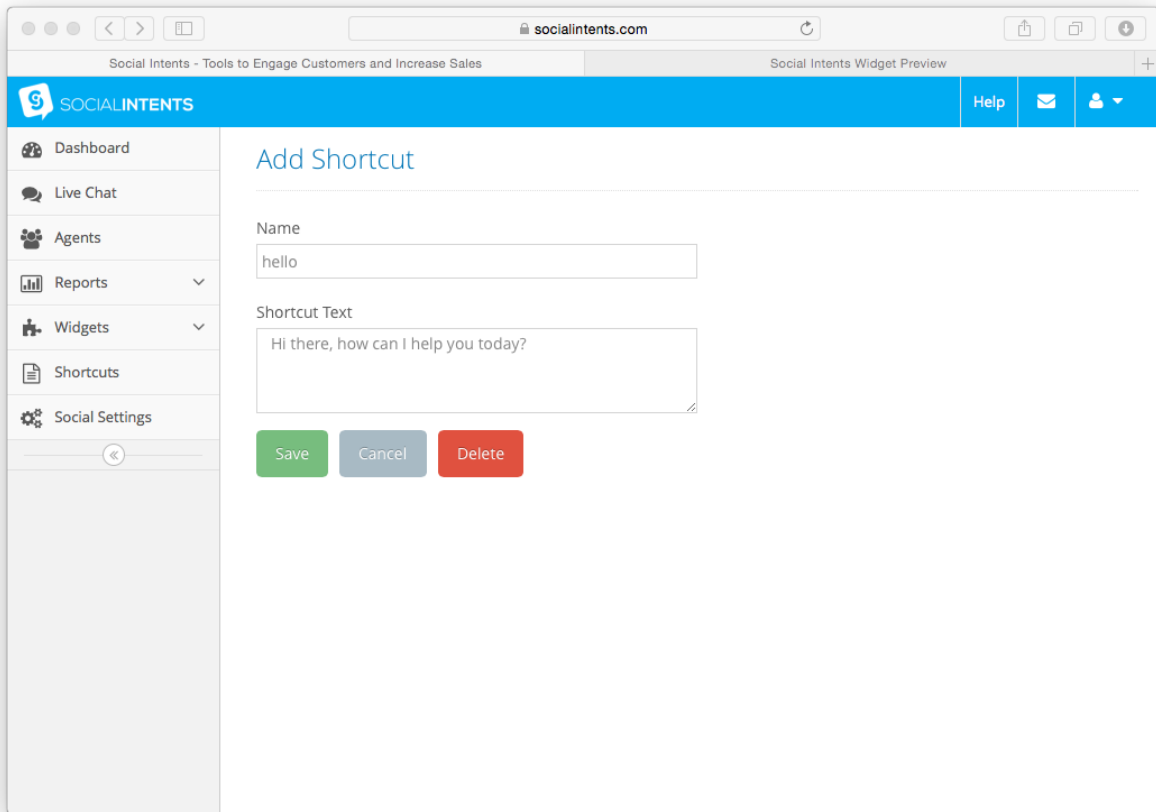
Mobile Phone Support

We have a mobile optimized chat interface that allows you to chat with visitors while you're on the go. You can click on an email notification or on a push notification to open the chat on your mobile phone and start a conversation with the visitor.

See the section above titled "Mobile Push Notifications with Pushover.net" for details on configuring your mobile phone with native push notifications.

Shortcuts

Shortcuts are a great way to set up default message responses to questions that your visitors typically ask. Configure these in the Shortcuts section and have quick access to all shortcuts right in the top right of your Agent Chat window as a shortcut list.

Use shortcuts to save time and increase customer satisfaction.

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Help

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«

Add Shortcut

Name

```
hello
```

Shortcut Text

```
Hi there, how can I help you today?
```

Save   Cancel   Delete

Click on the Shortcuts icon in the top-right of the chat to open your available shortcuts. Then select the shortcut and hit Enter to send the message.
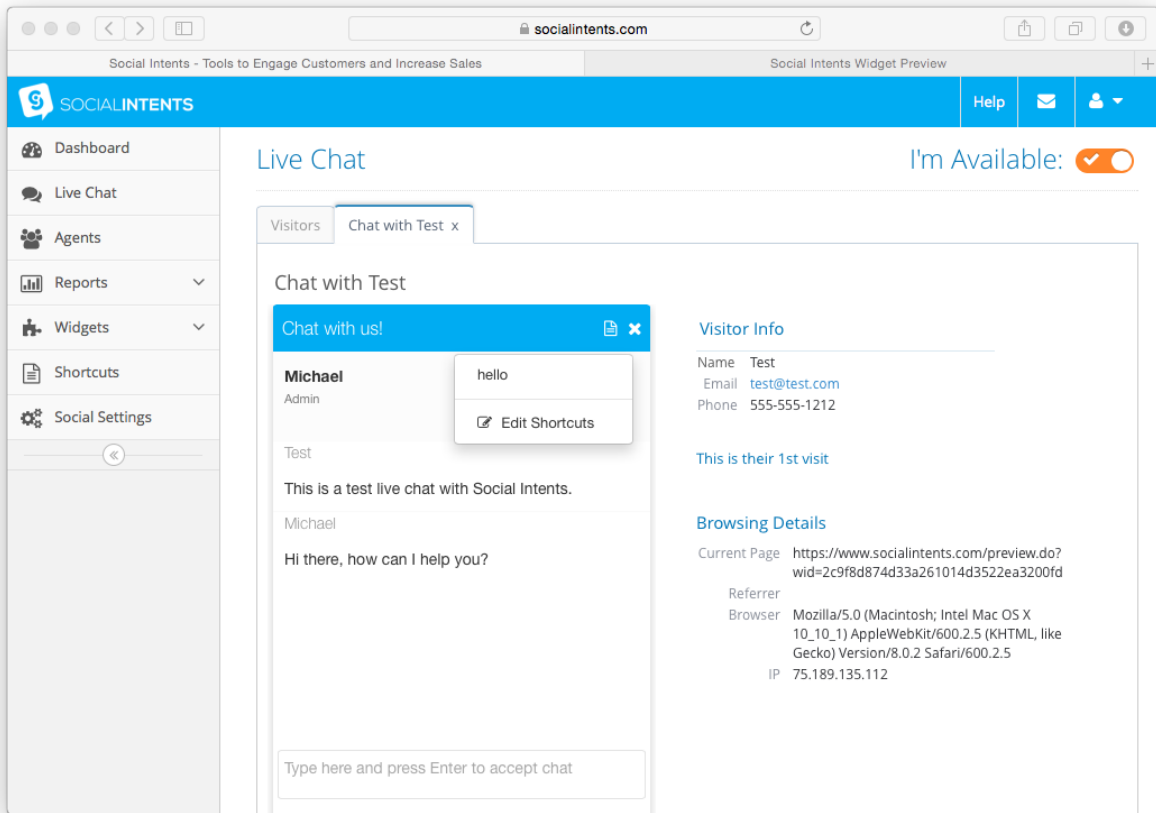
Multiple Language Support

With our Language Customization features, we support full control over the language displayed to the visitor in the live chat.

You can modify every field for your native language and for your brand. You have complete control and flexibility in what the visitor sees.

Best Practices

Login every morning

Make sure to login to your Live Chat every morning to change your chat from Offline to Online.

Respond quickly

Set up notifications if you're not always at your computer, and try to respond to customer requests in under a minute if possible.

Follow up on missed and offline messages

If you happen to miss a chat, always respond to any inquiries from your History in Live Chat. You'll see chats labeled as missed or offline for the ones you didn't get to.