
Basic Customisation Guide

Click4Assistance offers a fully flexible, versatile and customisable solution ensuring a seamless fit with your website and business needs.

This document has been created to provide instructions for the first steps of customising and branding the solution.

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Basic Customisation Guide

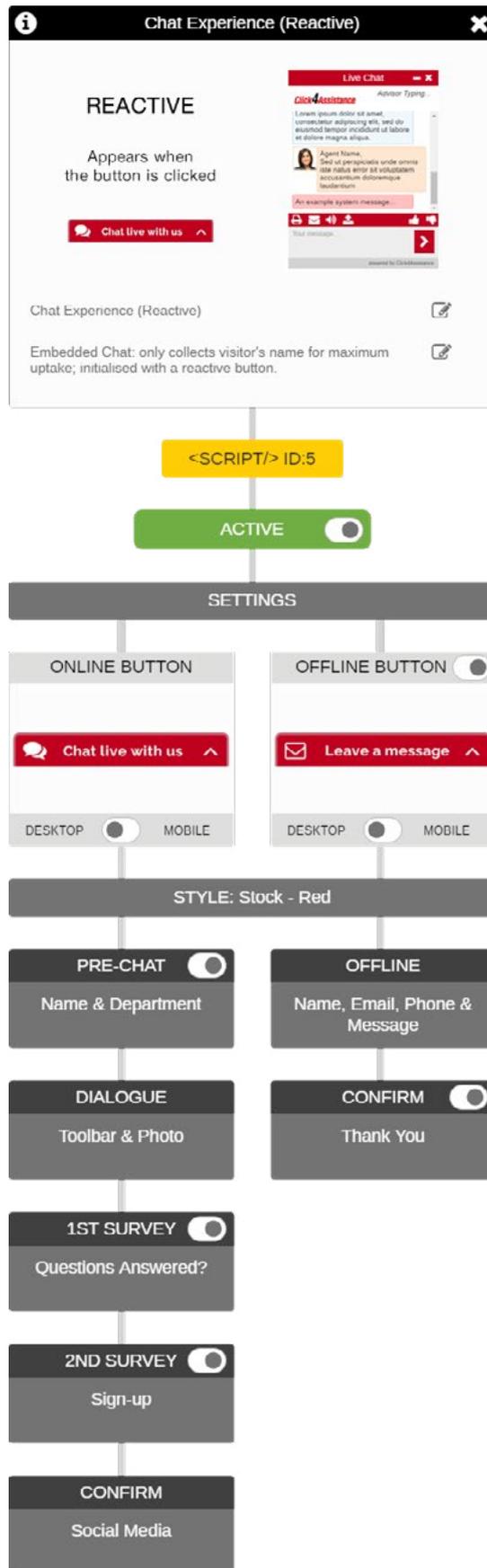
All visitor-facing aspects of the Click4Assistance solution are fully customisable, providing visitors with reassurance that they are speaking with a member of your team. This guide will cover all basic aspects of the customisation. Further information is available within the Help System which is accessed within the software or you may wish to read our Advanced Customisation Guide.

Once the script has been placed on your website, it will not need to be updated if changes are made to the visitor's experience. This eliminates the need for your web team to make any updates on your website when customisation changes are made to the windows.

We also offer a quality design service as part of our Professional Services – contact us for more information.

What is an Experience?

There are a number of different tools within the solution; each of which can have multiple experiences. It is these experiences that will define the visitor's journey throughout their interaction with the specific tool(s), and will determine the buttons that are displayed and the forms which will be presented.



Understanding terminology

Reactive & proactive - What's the difference?

Depending on the tool, it can be presented to visitors either reactively or proactively.

If the experience is configured to be reactive, a button will appear on your website, which your visitors can click should they wish to use the tool.

If an experience is proactive however, rules are defined which when met, will cause the experience to automatically display on the visitor's screen. Proactives are a great way of putting the tool in front of people at the right moment, and increase the interaction between you and your visitors.

If you would like further information on proactives, please refer to our Proactive Guide which provides further insight.

Popup & embedded - How are the tools displayed?

Two different types of windows can be used for an experience: either popup or embedded. The popup style window will open the experience in a separate browser window and is recommended if the experience is only used on specific pages. This allows a chat session to continue even if the visitor navigates to a page which doesn't contain the tool script.

If the experience is going to be across all pages, then embedded windows are ideal. These will slide in from the edge of the browser, and appear as though they are embedded within your website. As the visitor scrolls down the page, the embedded window will remain stuck to the browser, ensuring that it's always visible. This style is popular across many other platforms, especially in Social Media, therefore many visitors will find this familiar.

Desktop & mobile - Responsiveness

Each tool has been designed to ensure the user experience is seamless, regardless of whether they're on a mobile device or a desktop PC. All experiences have been designed with responsiveness as a priority. Each experience is fully responsive, and will adapt to the size of the visitor's screen. Additionally, there is an option to display different button images on desktop and mobile devices. The button can also be hidden if the visitor is on a mobile device - this is covered within the Technical Implementation Guide.

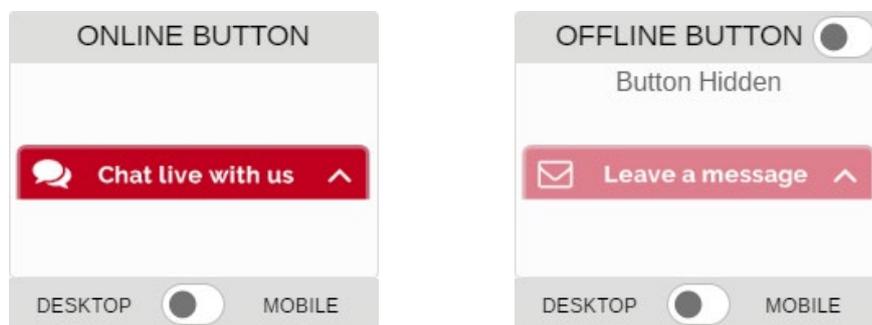


Note: All of the templates provided are fully responsive. If changes are made to the templates, please ensure that responsiveness is considered.

Buttons

Dynamic buttons

A number of reactive experiences (Chat, Video, Click2Call, and Meeting Rooms) use dynamic buttons, which automatically toggle based on your operators' availability. Experiences which use dynamic buttons provide the option to use separate online and offline button images, or hide the offline button completely. The offline button will be displayed on your website when there aren't any operators available to take a new chat for example, which when clicked, provides the option for visitors to leave their contact details.



Tip: When no operators are available to take new chats, the offline button can be hidden from visitors. Selecting the toggle button in the top-right corner of the offline button previewer will hide the button.

Desktop & mobile

It is important that your visitors are provided with the best experience possible, regardless of the device used. For this reason, each button has the ability to use an alternate image for visitors on mobile or desktop devices. If you choose to use different images, it is recommended to use smaller images on mobiles, such as a small speech bubble rather than text.



Visitor interface

What is a style?

A style defines the overall look of each form, specifying the logo, header, footer and text colours. Each experience will have an assigned style, ensuring that the visitor's journey is kept consistent.

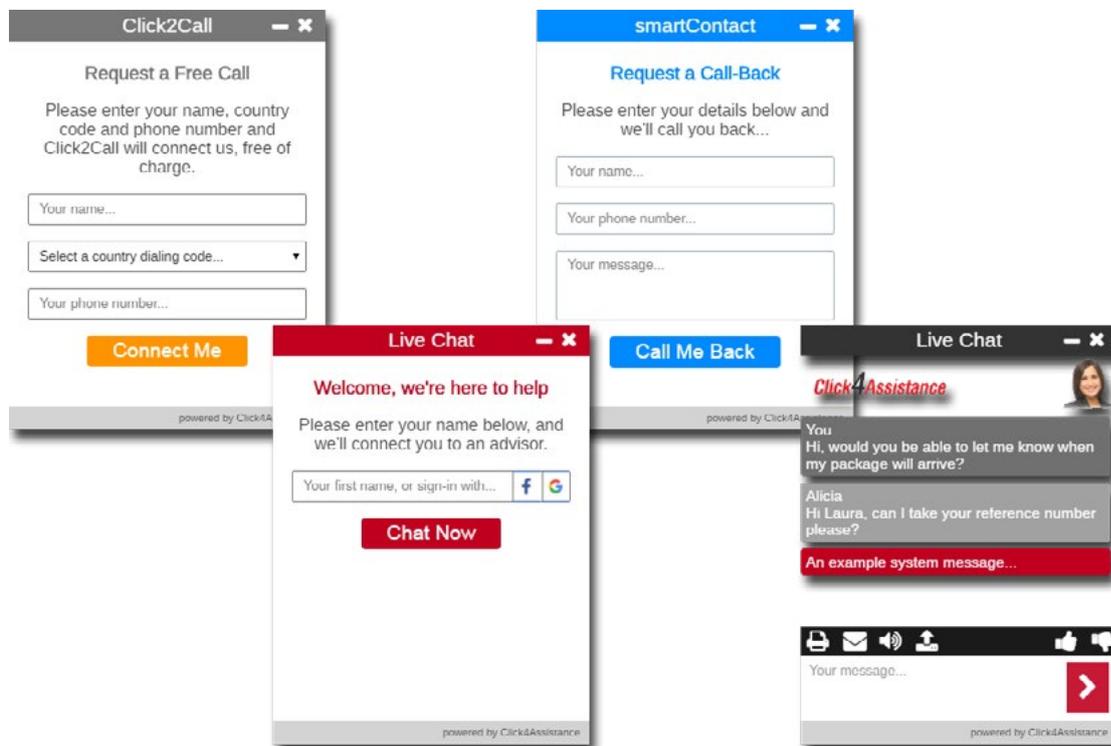
A single style can be used across multiple tools and experiences, ensuring that they all have a similar look and feel on your website. Or multiple styles can be created for different websites or individual pages. If you are familiar with building websites, the style can be considered as a 'style sheet', as it contains the CSS used for each form.



Note: One style can be used across multiple tools, meaning any changes made to a style will also affect all tools that are using it.

Which styles are provided?

All Click4Assistance accounts come with four different styles – Red, Blue, Grey and Translucent.

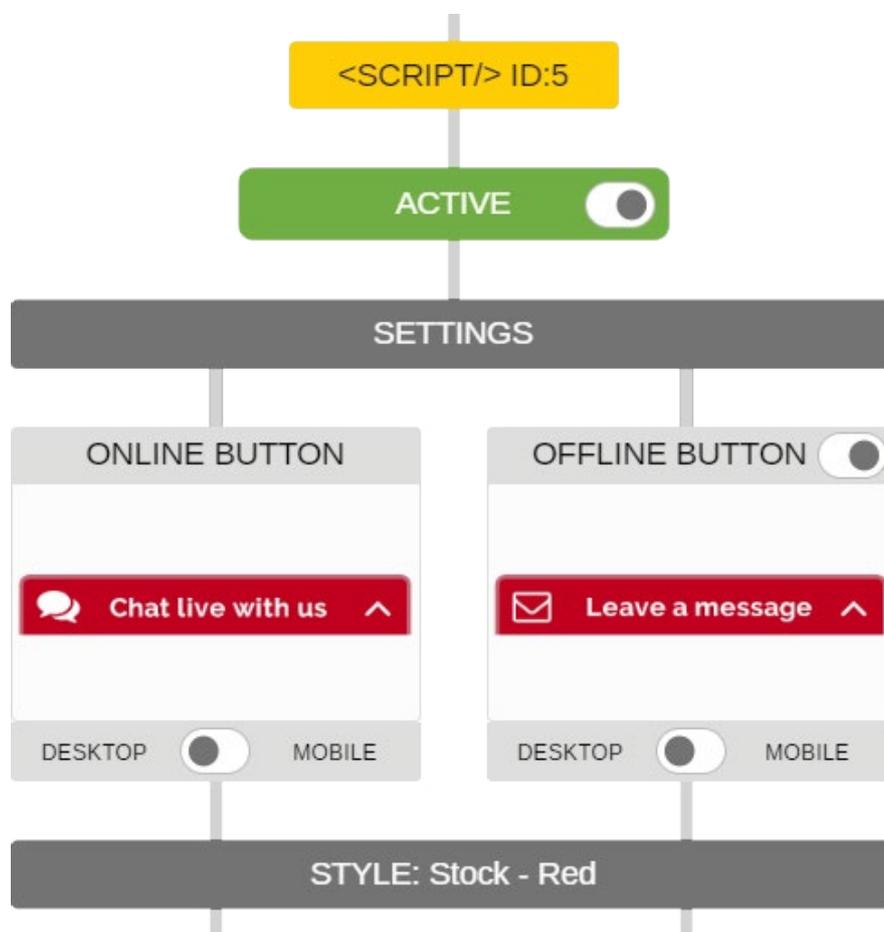


Visitor interface (continued)

Each style uses the specified colour for the header area, title text and button colour, among other areas, ensuring that the same colour theme is used across all forms. The translucent style will make the background of the form slightly see-through, providing a seamless look on your website.

How to select a style for the Experience

Once logged in, click the **Tools** button, and select the relevant tool. All experiences, regardless of the tool that uses it, will have a style button. This can be found mid-way down the experience as shown below, and will display the style currently being used.

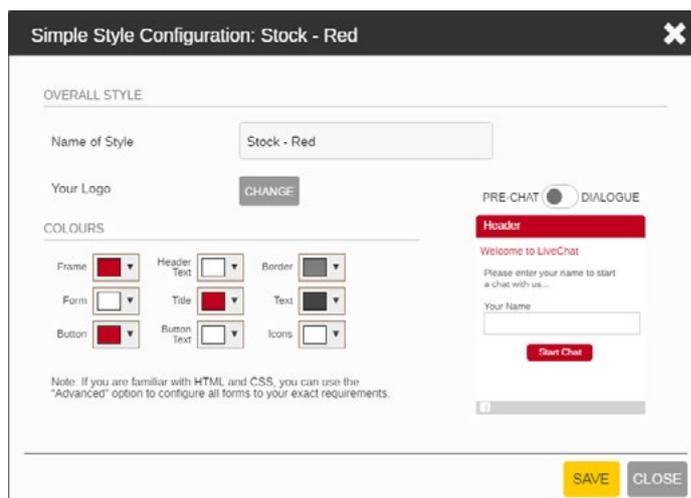


To use an alternative style, click the **STYLE** button to open the selector. This allows you to scroll through the different options available, and select the desired one.

Visitor interface (continued)

How to change the colour and logo

A default style can be updated to use your colours and logo. Select the **STYLE** button as previously discussed, and then click the **SIMPLE** button to open the editor as shown below.



To change the logo, click **CHANGE** which will provide a view of all the logo images available within the account. To select an existing image, simply scroll to your desired image and hit the **SELECT** button. When uploading a custom logo, a height of 65px or less is recommended due to the space provided.

To upload a personalised logo, select **UPLOAD IMAGE**, allowing you to choose the new image from your computer.



Tip: When uploading a custom logo, a height of 65px or less is recommended due to the space provided.

The default templates will only display the logo on the chat and video dialogue form. It can be included on other forms, however this will require knowledge of HTML and CSS to redesign the layout of the form.



Note: If you need to alter the positioning of the logo, this is done within the class `.chat-top .logo-wpr .logo`. This is located within the CSS, and can be accessed via the 'Advanced' button of the style.

Visitor interface (continued)

Changing the window colour

The simple style configuration also provides the option to select particular colours for a number of key areas of the forms. This includes different components of the forms such as the frame, background, button text, and heading text colours.

Selecting the colour beside each option will display the selector; a colour can then be chosen, or alternatively a hex code can be entered, allowing you to use your brand's colour scheme. Updates to the colours will be reflected on the example form image, displaying how the finished windows will look.



Note: Updating the colours and logo within the simple customisation area will affect all forms which use the style.

How to select the window type

The window type can be defined within the **SETTINGS** of the experience. Selecting either Popup Window or Embedded Window will determine how the windows will open. Each style can be used by both popup or embedded window types, allowing the type to be changed without the need to update the style or script.

When using the embedded windows on your website, should a visitor select the button on a device that is 300px wide or less, the popup window will be used by default. This is because the popup window will open in a new browser tab on the visitor's device, providing a more user friendly experience due to the smaller-sized screen, preventing the website from being obscured by the tool.



Note: If the visitor is using a mobile device on your website and selects the chat button that is using the embedded window type, the popup window type will be displayed in a new tab. This is done to enhance the user's experience, and ensure that they can continue to navigate the website with ease.

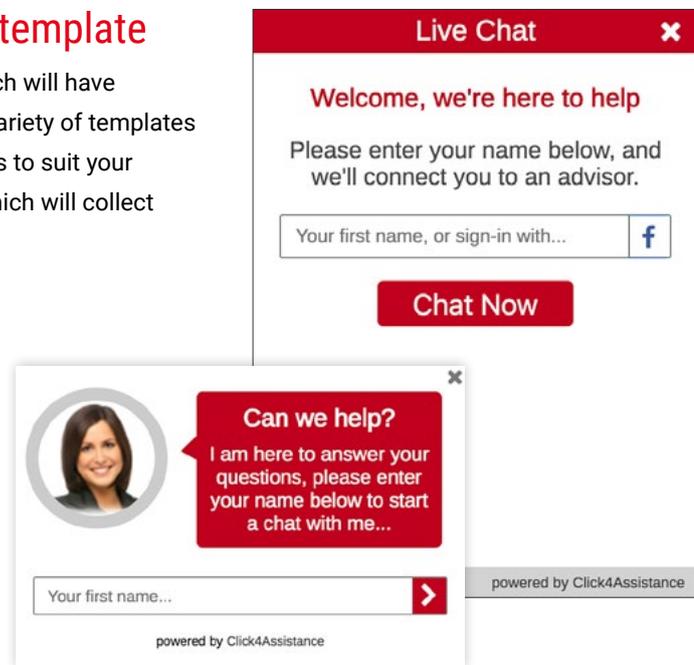
Visitor interface (continued)

How to select a different form template

Each tool uses specific form types - each of which will have a number of templates that are ready to use. A variety of templates have been designed, providing a range of choices to suit your needs. There are a number of forms available which will collect different information from the visitor.

The templates can be viewed within an experience by selecting a form, such as 'Pre-Chat'. This will then open up the Form Selector, allowing you to scroll through and select the template you require.

The templates included are for both proactive and reactive, so please ensure that the one most appropriate is selected.

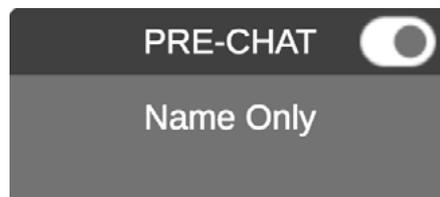


How to turn off forms

Chat and Video experiences have a number of data entry forms which can be switched on or off as and when required. This can be done by navigating to the appropriate experience, and clicking the sliding toggle in the top-right of the appropriate form. If the form is disabled, the toggle will be positioned to the left, as well as the form box being greyed out.

The follow forms can be disabled:

- Pre-Chat
- Surveys
- Confirmation



If the Pre-Chat is disabled, visitors will be taken directly into chat with an operator when they click on the chat button.

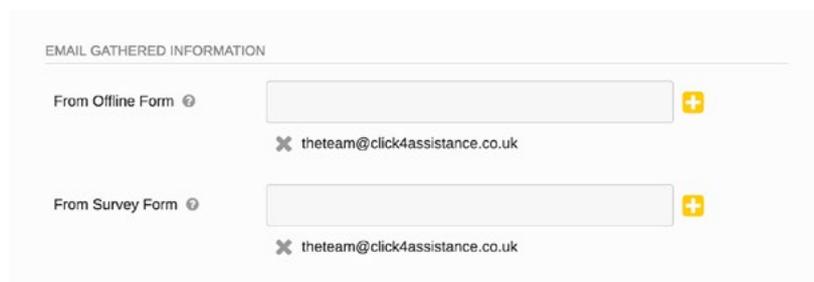
Settings

How to configure my experience

Each experience has various configuration options, ensuring that all aspects of the visitor's journey can be defined. To access the configuration of an experience, select the **SETTINGS** button within the experience, which will display the various options. Each tool provides different configuration settings within the experiences.

Updating the email address

There are a number of forms that allow visitors to submit information, which can then be emailed to key people within your organisation. The email addresses used can be managed within **SETTINGS** to ensure the most appropriate people receive the information. The **Email Gathered Information** area provides the option to add multiple email addresses against each data entry form, such as the offline form.



EMAIL GATHERED INFORMATION

From Offline Form  
 theteam@click4assistance.co.uk

From Survey Form  
 theteam@click4assistance.co.uk



Tip: To update the recipient(s) of the offline and survey information, use the **Email Gathered Information** area within **SETTINGS** of your chosen experience. The plus symbol beside the field can be used to add multiple email addresses, if required.

Creating a welcome message

Once the visitor has entered their details on the Pre-Chat form and selected the 'Chat Now' button, they are then taken to the dialogue form where an automated welcome message is displayed. This will engage visitors immediately, providing a bespoke experience. Within **SETTINGS**, welcome text allows a message to be defined, and can contain the following place holders which will automatically insert the relevant text: @COMPANYNAME, @VISITORNAME, @OPERATORNAME.



Tip: Placeholders can be used within the welcome message to automatically inject the appropriate information, such as the visitor's name. This will provide a personalised experience to each visitor.

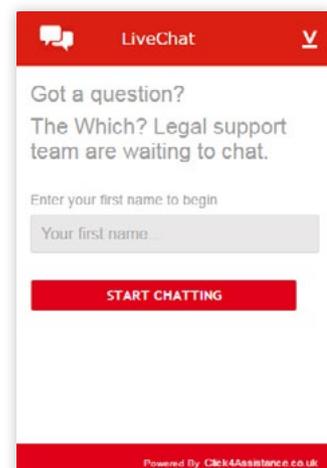
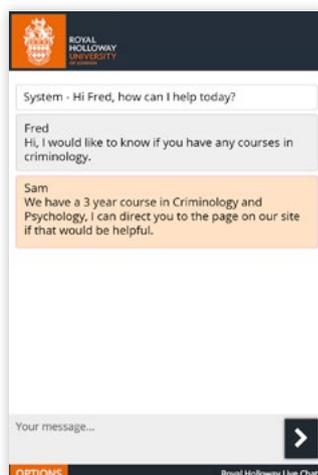
Bespoke design service

The Click4Assistance design team can carry out customisation of your forms to ensure that they fit seamlessly with your branding. The team can make small updates, such as configuring your logo, or can fully customise all aspects of the tool.

We will discuss exactly what you want to achieve and use your branding guidelines to achieve a flawless look throughout, and can recommend designs which work great for both mobile and desktop visitors.

We have a number of examples to provide an idea of what can be achieved. All customisation is done using CSS and HTML, making the solution extremely flexible. If you have an idea which hasn't been done before, our team are ready to take on the challenge!

To discuss your specifications, feel free to contact our team at support@click4assistance.co.uk



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