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# Getting Started Guide

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This document will guide you through the first simple steps to implementing and using your Click4Assistance software and aid you in achieving the best results from the solution

Converse | Monitor | Engage

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## Getting Started Guide

Congratulations! You have taken the first steps to increase sales, conversions and customer satisfaction on your website!

This document has been designed to take you through the initial steps of adding live chat to your website, using the software and handling chats.

This guide will take you through the following steps:

- Starting and Logging into Click4Assistance
- Adding Live Chat to your Website
- Adding and Configuring User Profiles
- Adding and Configuring User Types
- User Status
- Understanding the Dashboard
- Receiving/Answering a Chat
- Viewing Real-Time Visitor Activity

This guide will get you started, but due to the large amount of features within the software we couldn't include everything. You may therefore



wish to refer to the Help System, which can be accessed from any module or using the link in the bottom left of the software.

### We are here to help...

If at any time you would like some help or advice from our friendly team, please contact us direct on 0845 123 5871.

## Starting and Logging into Click4Assistance

### To start the software

Click the icon on your desktop or select **Programs/Click4Assistance Experiences** from the start menu.

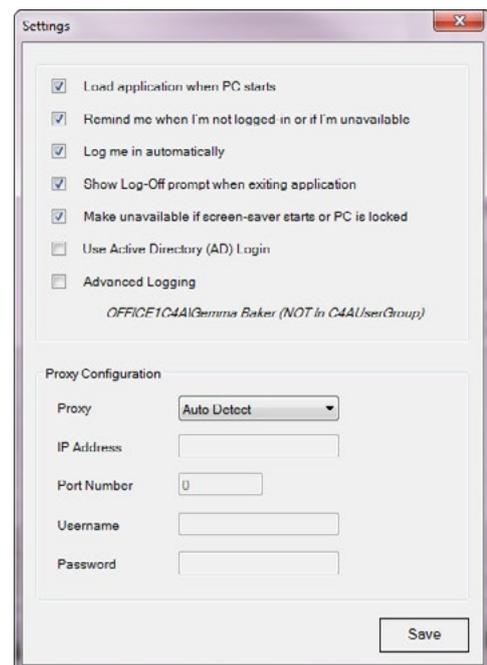


### Would you like Click4Assistance to open automatically when your PC starts?

No problem! Go to **File/Settings** (located in the top-left) and select "**Load application when PC starts**". You can also opt to be automatically logged-in, and the system can remind you if you are not available.



**Tip:** To ensure you get the most out of the system and don't miss any chat opportunities, make sure all 3 tick boxes are selected.



### Want to Log-in?

Enter your email address and password, tick **Remember Me** and click **LOGIN**. Your log in details will have been included in your welcome email, if you have forgotten your password please use the **Forgot Password** link to receive a reset code.

### What's next?

Once you have logged in the Welcome page will be displayed. This explains what you need to do next and will appear every time you log-in until you select **Don't show again**. You will be taken straight to the **Dashboard**, which can be configured to show the features and functionality you require. More information about the **Dashboard** is included later in this document. The main navigation will be displayed on the left of the screen.

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## Starting and Logging into Click4Assistance (continued)

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### Navigation Menu

The system has been designed to make moving around the software as quick and easy as possible. Modules are grouped logically, so you can find what you are looking for with a maximum of 2 clicks! Select the module tab, then the function you need – Simple!

### Quick Links

No matter where you are in the software, you can always get back to the frequently used areas using the **QUICKLINKS** in the bottom-right.



## Adding Click4Assistance to your Website

In order to allow visitors to start a chat and converse with you a Chat Button needs to be displayed, which requires the addition of a small piece of script to your website.

When you log into your account for the first time, a window will appear containing the chat button script. Implementing this small script will display a sticky chat button on your website, allowing you to track visitors and proactively engage with them!

Welcome to the Click4Assistance Solution

**Simple setup**

- 1 Simply **select** the script in the panel below
- 2 Copy and paste the script into your website
- 3 Start receiving enquiries and generating leads!

```
<script type="text/javascript" >
function InitialiseC4A() {
  /* Chat Tool */
  var Tool1 = new C4A.Tool1(1);
  C4A.Run('b2adh2bc-68b7-42cc-9e70-7748df50da77');
}
</script>

<noscript><a href="https://www.click4assistance.co.uk/add-live-chat-software-click4assistance-uk"
target="_blank" style="font-size:10px;position:fixed;bottom:2px;right:2px;">Click4Assistance UK Live Chat
Software</a></noscript>
<script src="https://v4in1-si.click4assistance.co.uk/ST.js" type="text/javascript" defer="defer"></script>
```

During the trial period our account managers are here to help and ensure you get the most from the solution and answer any questions you may have, including adding the small piece of script to your website.

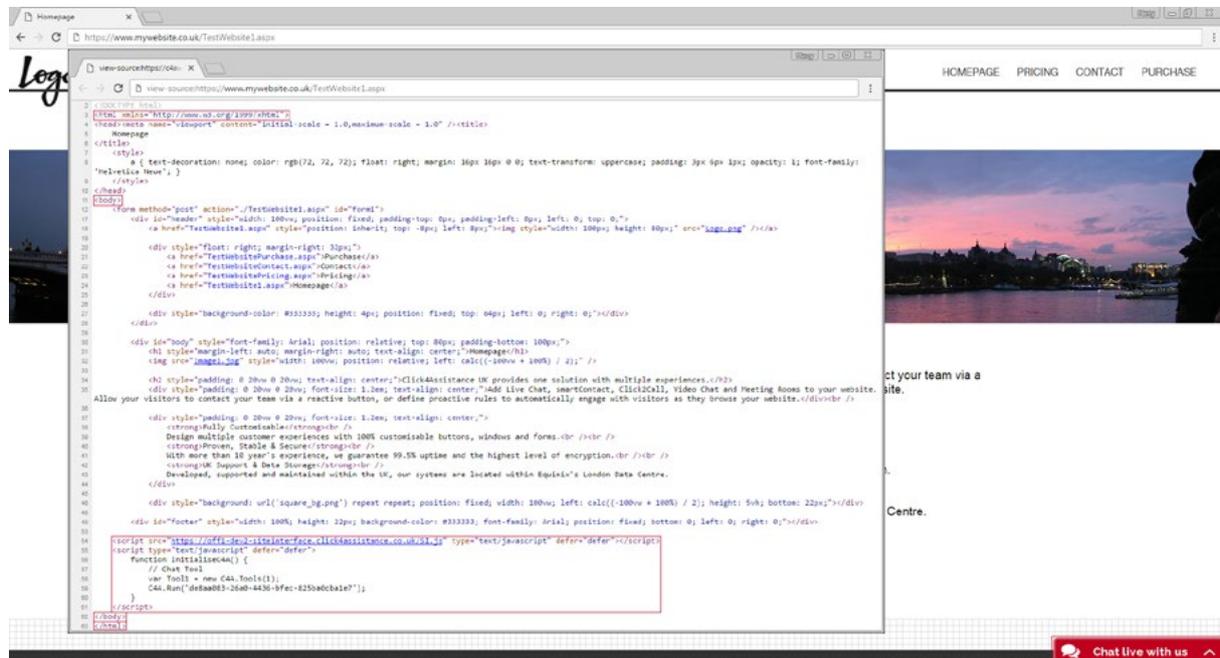
As you're new to using this solution, here are a couple of handy tips to get you started...

Help	Explore	Create	Login
Use the help panel at the top of every page, simply click "Learn More" to see further information. Alternatively, the complete help system can be found by clicking "Help".	The left-hand side menu provides you with access to all modules and tools within the solution.	The solution is 100% customisable, allowing you to create multiple reactive or proactive visitor experiences in line with your brand.	Don't forget to login so you are available to handle the incoming enquiries!

DONT SHOW AGAIN CLOSE

Simply copy the script which appears in the notification window, and paste it within a common component between the <BODY>....</BODY> tags of your website.

## Adding Click4Assistance to your Website (continued)



Once implemented, the final step is to go to your website and check that the button is visible. If the chat button is appearing in the bottom right of the site, then you have successfully added the script.



**Note:** Make sure that your operators are logged into the Click4Assistance software and are available, allowing visitors on your website to instantly start interacting with your team.

If you would rather implement the HTML script onto your website at a later time, the script can be generated from the appropriate experience. Within the solution, select the **Tools** module, and navigate to the appropriate tool (**Chat**, for example). Selecting the **Script** button associated with the experience will then display the script, allowing you to either copy it or enter an email address to send instructions so that it can be added when you are ready.



**Tip:** If you are looking for a more advanced implementation, be sure to take a look at our Advanced Implementation Guide. Don't forget, our team are always happy to help, simply drop us an email at [support@click4assistance.co.uk](mailto:support@click4assistance.co.uk)

## Adding and Configuring User Profiles

Go to **My Account/Users**.

Click **+ ADD NEW** located top left of the screen. This will open a window allowing you to enter name, email and password details, and then select the User Type for the new user.



**Tip:** User types define the level of access, permissions and settings for the user. This is covered in the next section.

- **Phone Number** - If you are using the Click2Call functionality, enter the phone number.
- **Send Email** - Tick the checkbox to email the new user their login information.
- **Make Unavailable** - By default, when a user logs in they are instantly available to receive a chat. For administrators, managers or supervisors that may not be handling chats, you can tick the box to ensure they are unavailable on login.
- **Primary Contact** - If this user should be the primary contact to receive communication, tick this box.

Click **SAVE** to record your changes.

## Adding and Configuring User Profiles (continued)

You will then be presented with a second window and have the option to assign Routing Groups, upload and assign a photo and configure the SMTP Settings for this user.

- **Routing Groups** - Select the relevant routing group folder and click **ADD USER TO GROUP**. Users can be in multiple routing groups.
- **Photo** - Use the carousel to choose an existing image, or click **UPLOAD IMAGE** to upload a new image, and then click **SELECT**.
- **SMTP Settings** - This functionality allows emails to be sent directly from the solution from the user's personal email address. Enter the relevant details and click **SAVE**.

Editing User: Mrs Lucy Cross

General Routing Groups Photo SMTP Settings

USER AND LOGIN INFORMATION

First Name / Surname Mrs Lucy Cross

Display Name Lucy

Email lucy.cross@click4assistance.co.uk

Password CHANGE PASSWORD

Use Active Directory  (Optional)

User Type Administrator

OTHER SETTINGS

Phone Number United Kingdom (+44) 545454545454

Make Unavailable  Makes user unavailable as soon as they log in

Primary Contact  There can be only one primary contact against an account

SAVE CLOSE

## Adding and Configuring User Types

By default, you will have 2 pre-set user types: Admin (full access) and CSR (limited access). A full list of user type settings for these types can be viewed within the help system.



**Tip:** You can edit the existing settings, however we recommend a copy is made which can then be edited accordingly, preserving the default settings.

### Adding a New User Type

Go to **My Account/User Types**.

Click **+ ADD NEW** located top left of the screen. This will open a window allowing you to copy an existing user type. Provide a relevant name and description then click **SAVE**.

You will be presented with a second window and have the option to edit the description, modules, permissions, alerts, security and other settings.

- **Modules** - Allows you to define which modules on the navigation bar are accessible.
- **Permissions** - Tick/untick boxes and configure settings as required.
- **Alerts** - Define if alerts are audible, visual, both or none, which sound is used and if an alert will repeat until acknowledged.
- **Security** - Set login type, times that access is allowed and auto log-off time. Restrict user type to single IP address when logging in.
- **Other Settings** - Set user type time zone (defaults to GMT)
- **Users Assigned** - Lists users currently assigned to this user type.

Editing User Type: Administrator

DESCRIPTION FOR THIS USER TYPE

Provides full access to every module, with standard alerts, using GMT time-zone, security restriction not enabled, permissions set for full administration.

Modules Permissions Alerts Security Other Settings Users Assigned

Click **SAVE** to record your changes.

## User Status

### Let's talk about availability

In order to handle chats from your website at least one operator **MUST** be logged in AND available/online.

An operator can be:

**AVAILABLE/ONLINE** – You are logged in and available to take chats, the Chat Button will be visible and Proactives will be operational. This status is highlighted by a green heartbeat in the top left of the screen.



**Note:** To achieve the best results from the solution it is essential that your chat facility is online.

**UNAVAILABLE/OFFLINE** – You are logged in but unavailable to take chats, if you are the only operator logged in the chat button will default to the Offline status and Proactives will not operate. This status is highlighted by a red flat line in the top left. If you are away from your desk, always switch to unavailable/offline.



**Tip:** To toggle between Available and Unavailable simply click the green/red bar.



**LOGGED OUT** – Once you click **LOG OFF** (bottom-left), you will be disconnected. If no other operators are logged in and available, the chat button will default to the Offline status and Proactives will not operate.



**Note:** To ensure you do not go home and leave yourself logged-in the system will automatically log you out at a predefined time (by default this is set to 5.30PM) If you would like to adjust this time please refer to your Administrator who can adjust your user settings.

### What happens when we're not available?

If no operators are logged in OR available, visitors to your website will see the offline chat button.

When the visitor clicks on the offline button, a call back form is presented to gather their contact details. This information will then be sent to your email address for a follow up at your convenience.

## The Dashboard

A cutting edge, intuitive and user friendly interface, the **Dashboard** is the control centre for chat activity, providing access to all chats and visitor activity on your website. All the tools to conduct a chat are at your fingertips, information on each chat and the associated visitor is just one click away.



**Note:** The Dashboard can be configured to display the features and functions that you require and you can set your own background.

By default, the Dashboard will display Chat List, Predefined Replies and Operator List.

## Chat List

Displays all incoming chats and the status.

- A red chat bubble indicates a chat that has not yet received a response.
- A green chat bubble indicates a chat in progress.
- When the visitor has left or closed the chat, a grey chat bubble will be shown.

	OPERATOR	VISITOR			ACTIVITIES	PROSPECT
	Support	Bradley	00:00:11	08/Jun 15:22:27		
	Jill Sales	Laura	00:05:19	08/Jun 15:17:19		
	Gemma Everybody	Peter		08/Jun 15:10:33		

Click once on the relevant chat then click view, take or allocate as appropriate. Use the columns button to add/remove information columns from the display.

## The Dashboard (continued)

### Replies

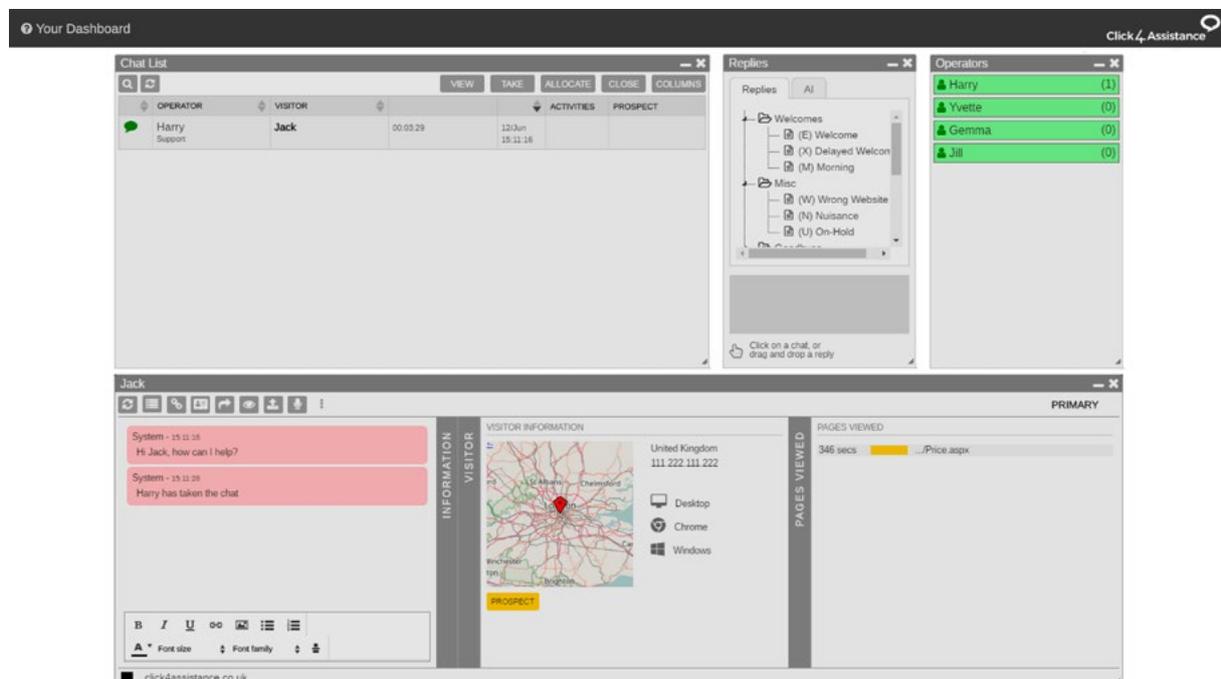
This window displays the library of predefined replies that can be selected to quickly and easily respond to a visitor. You can drag and drop replies into chats from this area.

### Operator List

A list of users that are logged in. Their availability status will be shown as green for available and red for unavailable. You can also see how many chats are allocated to each operator.

### Configuring your Dashboard

Close the windows that are not required and open other windows from the navigation on the left. You can change your background in **My Dashboard**, using the drop down. Your configuration will be stored in a cookie on your PC, remembering the windows and positions you have defined. You can reset the Dashboard at any time using the shortcuts at the top of your navigation menu.



## Receiving/Answering a Chat

### OK, let's start our very first chat...

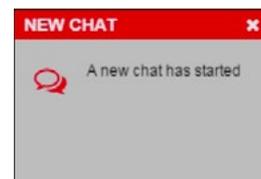
Once you have added the chat button script to your website you can click on the chat button and start a chat as if you were a visitor on your website. If you haven't yet added the script, within the navigation menu select **Dashboard/General/Sandbox**. This will launch a test page. Click **SCRIPTS** and select a Reactive Chat Experience, click **ADD TO PAGE**. This will display a chat button for you to click to start a chat.



**Note:** If the button appears offline and you are unable to start a chat, make sure you are available!

If you are the only operator available the system will automatically allocate the chat to you, if other operators were available the chat may have been directed to them.

You will receive an alert that a new chat has started; you will also hear a sound if you have speakers attached to your PC.



You will see the new chat in the chat list and a new window will open containing the chat.

- View the map, visitor IP and device used by clicking on the grey vertical **VISITOR** tab,
- View the visitor pre-chat data by clicking on the grey vertical **INFORMATION** tab.
- Type a response to the visitor in the reply area located at the bottom of the chat window. Press 'Enter' on your keyboard to send.
- Use a predefined reply - drag-and-drop from the list, or click on the desired response and click **REPLY TO:**.
- Use a predefined reply shortcut - ensure your cursor is within the response area and press CTRL + H.

### Let's explore...

These are just a few suggestions, as there are many other features you can use during a chat (navigate visitors around the website, Co-Browse, View previous chat etc.).

## Receiving/Answering a Chat (continued)

### Ending a Chat

Once the chat has finished, it will remain in the Chat List and as a window on your screen until it's closed.

To close a chat, make sure the relevant chat is selected within the list and use the **CLOSE** button, or use the small cross within the chat window.

The **Close the Chat** window allows you to categorise the chat (so you can report on the reason and outcomes of each chat), add final notes, assign a new prospect, and send a copy of the transcript.



**Tip:** Why not categorise a chat during the conversation, rather than at the end? It will save you time.

You can either **STORE** the conversation for future reference (or to recall when the visitor returns) or **DELETE**. We recommend all chats are stored as soon as they finish, this ensures the Chat List and Chat Windows only include active chats.

### Viewing Stored Chats

Chats that have been stored, together with their related information can be viewed in **Dashboard/Chat/Video/Stored Chats**. Search for specific chats by filtering the list by date, operator, visitor name etc. using the **Filter** icon.



## Viewing Real-Time Visitor Activity

If you have added the tracking script to your web-pages, the software will show you visitors that are currently on your website.

To see the activity on your website select **Dashboard/Visitor Activity/Real-Time**.



**Tip:** By using a filter, the software can display visits on specific date and times.

See which pages each visitor is viewing and for how long, how many visits they have had, etc. - you can even see the visitor's location on a map!



**Tip:** You can actively approach visitors on your website. Try 'pushing' a proactive chat invitation to a visitor, offering your help and assistance.

Visitor List								
111.222.111.222		HISTORY	PAGES	CO-BROWSE	PROSPECT	MAP	PROACTIVE	COLUMNS
LOCATION	PROSPECT	ONSITE	PAGES	CURRENT	ACTIVITIES			
27/Jan 14:39:19 	Woodbridge New Jersey Company 101	(Maybe) Luke Aldridge Company 101	00:07:09	4	.../pricing.aspx Title:Live Chat Software For Website   Costs and Prices Click4Assistance UK			
27/Jan 14:38:19 	London, City of London		00:08:08	8	.../starttrial.aspx Title:Website Live Chat Software Download   UK Click4Assistance			
27/Jan 14:35:53 		Aaron Fuller Company 202	00:11:35	7	.../thesolution.aspx Title:Live Chat Software   Benefits of adding Click4Assistance UK			

Showing 1 to 3 of 3 records

## Everything Else

The system has been designed to ensure there are no limitations on how you present an experience to your visitors, allowing full customisation, numerous designs and scenarios, all geared around your business needs and requirements, including:

- Multiple communication tools to ensure your visitor has every opportunity to get in contact.
- The 'Experience' provides complete versatility, allowing variable combinations of windows to be presented to different web pages or websites! Why not have a different design and style for the chat window based on which chat button is clicked - for example one for support and one for sales.
- Different designs of online and offline buttons across your website.
- Total control over the content displayed - present different and dynamic welcome messages, for example "Hello [VISITOR], my name is [OPERATOR], how can I help?", personalise the chat and display a photo of the advisor and/or display marketing/promotional/special offer material.
- Manage the information collected within each window - ask the visitor for their details before that chat starts, or take them directly into a live conversation. When the chat has ended, gather feedback from the visitor in the form of surveys.
- The design and branding of all windows that are presented to the visitor.
- Engage with visitors using an unlimited number of proactive invitation designs asking "Would you like some live assistance?".
- Approach browsing visitors with your latest promotions and special offers.
- Add Predefined Replies, Chat Categories and Routing Groups.
- Highlight crucial pages for tracking and reporting purposes via Hotspots.
- View a full range of management reports.

And much more...

Our knowledgeable team are here to help, with a wealth of experience working alongside clients ensuring the best possible results are achieved.

## We are here to help...

We appreciate you may be using this technology for the first time, and will have further questions. Feel free to contact us any time on 0845 123 5871

# Contact Us

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