

User guide

ONLINE CHAT

Version: 1.0.0

The **Online Chat** module developed by PrestaShop allows you to offer an online chat system on your shop to have discussions with your customers. This communication tool has become **vital for e-commerce stores** and allows you to create stronger relationships with your customers by guiding and advising them in their purchases in real time.

Below you will find all the information you need to understand and use this module.

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1. HELP GETTING STARTED TAB

At any time, you can use this tab to help you in the different elements of configuring the module and find user documentation.

Once you install the module, two new items will appear in your back office:

- 1) **a window in the lower right corner of your screen**
and
- 2) **an Online Chat tab** in the lower left that contains two sub-tabs:
 - Conversation history
 - Configuration

*First, **click on the Configuration tab** to configure the module.*

Once the configuration is complete (follow the recommendations in part 2 “Configuration tab”), you can then go online by clicking on the button on the lower right in your back office.

2. CONFIGURATION TAB

The module is configured in three steps, corresponding to the retailer’s own settings, how the online chat is displayed as well as “offline” management.

A) Retailer settings

- Fill in the name of the operator that you would like to display in the customer’s chat window. This name will appear under the messages you send to customers.
- Click on Yes or No to activate and deactivate back office sounds for new messages and conversations.
- Enter the maximum number of customers who can simultaneously chat with you. Note that depending on your server, a number higher than 15 or 20 could have a negative impact on your site’s performance. We recommend you conduct several tests to find the right number for your store.
- Finally, activate or deactivate Offline mode. If you decide to activate it, this means that your customers will see a chat window with a contact form when you are not connected or when you have reached the maximum number of simultaneous online conversations. If you choose to deactivate this mode, your customers will not see a conversation window when you are offline.

B) Configuring the online chat window

This configuration step concerns how your online chat window is displayed in the front office:

- Fill in the header text (the box at the top of the chat window) that you want to show (ex.: “Hello, we are online” or “We are here to help”, etc.) as well as the welcome text that will be shown at the top of the window above the conversation’s first messages.

Note: if your store is available in several languages you must translate the header and welcome text for all languages.

- Choose the background and text colors for the following elements:
 - 1) The header
 - 2) The operator’s message boxes
 - 3) The customer’s message boxes



PrestaShop tip: We recommend that you choose colors that match your store’s colors so that the chat window integrates into your site perfectly.

When you are performing this step, you can preview how it is displayed in the window on the right side of your screen.

C) Offline configuration

This step only appears if you have activated offline mode. You must enter the following elements:

- The email address to be notified when a customer leaves a message on your store when you are offline
- The header and welcome text, in the same way as for the online chat window
- The information requested and required in the contact form: first name, last name, email, telephone number, message. You choose the information that is important for you.
- The header’s background and text color, just like for the online chat window.

When you are performing this step, you can preview how it is displayed in the window on the right side of your screen.

WARNING: Do not forget to save your configuration, by clicking on the *Save button on the bottom right side of the configuration page.*

Once configuration is complete, you can then go online and speak with your customers. Read the following documentation to find out more on managing online and offline conversations.

3. MANAGING CONVERSATIONS (ONLINE/OFFLINE)

A) Managing online conversations

1- Chat windows

- When a window opens with a new message, the customer's information is displayed with their ID and name if they are signed in or with their guest ID if they do not have an account. You can respond to the customer directly. Once the message is sent, wait for the customer to send their response, which will appear instantly in the chat window.

You can also hide the conversation (you can find it in the recap window, in the "Open conversations" section), minimize the window or end the conversation. If you click on "End the conversation", an information message will appear asking you to confirm that you wish to end the conversation. It will then appear in the finished conversations.

- Depending on the type of device that you use, you can only display a certain number of windows simultaneously in your back office. On a standard computer, you can display four simultaneously. Should you wish to open other ongoing conversations, you can either end certain conversations or hide them before opening new ones, or open the new conversations directly. In this latter case, new windows will replace windows that are already open (which will then be available in Ongoing Conversations).

2- Recap window

When you are connected, a recap window will always be displayed in the lower right part of your back office. This displays the following information:

- **Ongoing conversations:** all new or ongoing conversations are displayed in this tab.
- **Finished conversations:** when you finish a conversation, it is displayed in this tab until you sign off from chat. You can reopen a finished conversation if you would like to continue speaking to the customer (if they are still on your site). The conversation will reopen automatically if the customer has a new question for you.
- **Online/offline switch button:** at any time, you can go online or offline for chat by clicking on the switch button. Once you are connected, the online chat window is shown on your store's front office and your customers can then speak with you. When you are disconnected, all conversations that were in "Finished conversations" move to the database and are displayed in the history table (find more information below in the user documentation).

You can also minimize the window by clicking at the top of it.

B) How offline messages work

Even when you are disconnected, and if you have activated offline mode, your customers will be able to contact you directly from the chat window.

1- Front office chat window

The offline-mode chat window is displayed as a form with the information that you required in the settings. When your customer fills in the required fields and sends you a message, you receive it via email at the address you entered in the Offline configuration section.

2- Receiving emails and responses

All of the information required in the form is displayed in the email that you receive. If you requested the customer's email address, the email will be sent from their address. You can then respond to them directly from the first email.

If you did not ask for their email address, you will receive an email from your store's default email address.

C) Conversation history table

At any time, you can find the online conversations that you have previously archived in a conversation history table. These are found in the Online Chat tab, in the Conversation history sub-tab, in the lower left of the vertical menu.

In this table, you will find the following information:

- Customer name and ID (or guest ID if the person was not signed in)
- Date and time of the last message
- The customer's last message
- Email and telephone number (this information is only displayed if the person has an account and was signed in when the discussion was had)

In this table, the following actions are available:

- See the conversation: a pop-up appears allowing you to see the different exchanges that you have had with this customer
- Delete the history: you can delete one or more conversations from your history.

Info: if a customer is signed in, their last archived conversation will be displayed underneath their previous messages. If the customer is not connected, they will have a new guest ID for each conversation. Each archived conversation will then create a new line.

D) FAQ (Frequently Asked Questions) TAB

You can view the questions most frequently asked by retailers that have purchased this module at any time. This FAQ section should answer most of your questions about how the module works and its configuration.

E) CONTACT TAB

Get our contact details for any questions you may have about using the module.

Useful links:

[PrestaShop User Guide](#)

The Online Chat module was developed by the PrestaShop Team, guaranteeing perfect compatibility with the PrestaShop e-commerce software.