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Chat & Messaging System Overview

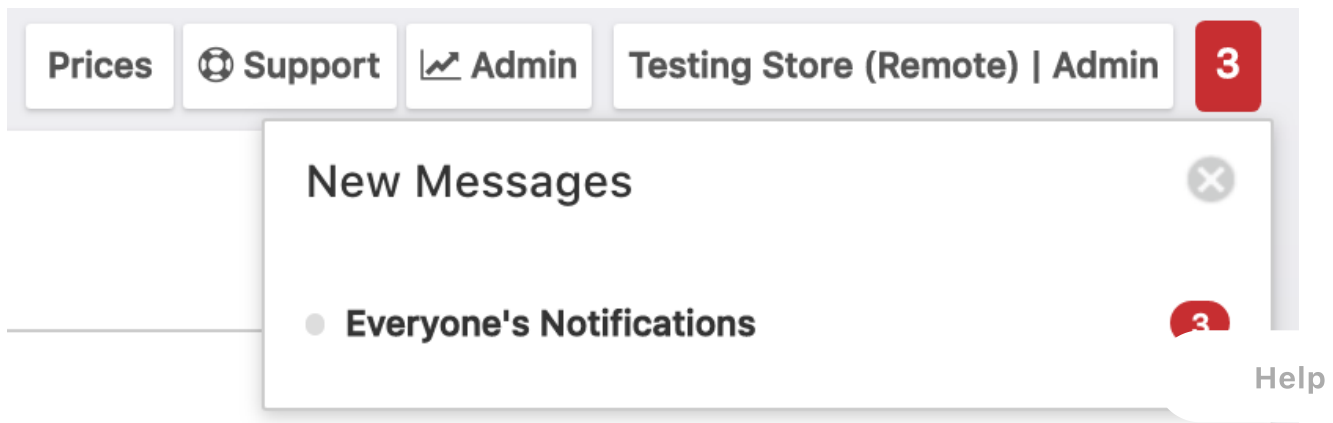


Josh Nye

2 years ago · Updated

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Whenever you receive a new message or alert you'll get a notification in the top right of the screen and the pop up will display which channel or private chat the message is in. When you click on a channel or chat it will open.



You can also access your messages via the Messages module.



Employee



Messages



Racking

From this module, you can access all of your private messages between you and other employees, channels, and incoming messages from customers.

When you open the module it will show you where you left off previously. Take a look at the conversation in the picture below for some pro tips!

Notifications

- Everyone's Notifications
- Your Notifications** 10

Channels

- All Employees
- West Side Routes

Direct Messages + New

- QA to Dev
- Johan B**
- Admin

Chat with Johan B


1/23/2019 **You**
I love this new chat system!

1/23/2019 **You**
Look you can even share items by typing the barcode number: 65430987

Andrea Pirlo
1830504118

CUSTOMER

\$1



Ralph Lauren
Shirt
65430987

1/23/2019 **You**
Sam thing with orders, just type the order number and it will link it in the chat! 19009-01104

Order 19009-01104 for Tony Kross

1/23/2019 **You**
Which of these two items do you think the blue dress we found today is: 654321321 or 654321322

Michelle Obama
1902301100

DETAILED

\$11.95 + \$3.69

17 DAYS LATE

Delicate Fabric

Andrew Gn
Dress
654321321

Freda Peoples
1902301101

DETAILED

\$13.15

18 DAYS LATE

Ornaments

Andrew Gn
Dress
654321322

Type a message and press Return key to send to "Johan B"

Red circles with numbers next to channel or conversation names indicate that there are new messages.

Notifications

- Everyone's Notifications**
- Your Notifications

Channels

- All Employees
- SF Route Customers Only
- MARIN Route Customers Only

Direct Messages + New

- ross M

Everyone's Notifications

2/8/2019 **Balboa: Ross Medina**
Repair my button
RESOLVED 🍌 ross M View Ticket

2/8/2019 **Balboa: Ross Medina**
Fix my button
RESOLVED 🍌 ross M View Ticket

2/8/2019 **Balboa: Shira Magun**
Thank you, I plan to pick up tomorrow
RESOLVED 🍌 ross M View Ticket

2/10/2019 **4 Rush Orders Not Ready**
Open the Production Module to view these orders.
Production Module

12:04pm **5 Rush Orders Not Ready**
Open the Production Module to view these orders.
Production Module

1:59pm **Demo: Josh Nye OG**
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nam fermentum interdum est sit amet consectetur. Nulla iaculis consequat magna vel euismod. Cras semper sem dui, ac eleifend ipsum feugiat non. Sed vulputate vestibulum nulla nec scelerisque. In hac habitasse platea dictumst. Fusce convallis l...
UNASSIGNED Assign It Take It Mark as Closed

New Messages

Type a message and press Return key to send to "Everyone's Notifications"

When you open a channel the new messages will be under a red line with the "New Messages" header.

When a customer sends a new text or email the system will automatically create an issue and display 3 new options in the messages feed; Assign It, Take It, and Mark as Closed. The system will also show you the status of the message. Unassigned issues are red, assigned issues are blue and show which employee it's assign to, and closed issues are green and show which employee resolved the issue.

The screenshot displays the 'Everyone's Notifications' interface. On the left is a dark blue sidebar with navigation options: 'Notifications' (with sub-items 'Everyone's Notifications' and 'Your Notifications'), 'Channels' (with sub-items 'All Employees', 'SF Route Customers Only', and 'MARIN Route Customers Only'), and 'Direct Messages' (with a '+ New' button and a sub-item 'ross M'). The main area shows a list of notifications. The first two are from 'Balboa: Ross Medina' on 2/8/2019, both marked 'RESOLVED' with a green status bar and a 'View Ticket' button. The third is from 'Balboa: Shira Magun' on 2/8/2019, also marked 'RESOLVED' with a green status bar and a 'View Ticket' button. The fourth is a system message on 2/10/2019 at 12:04pm: '4 Rush Orders Not Ready' with the instruction 'Open the Production Module to view these orders.' and a 'Production Module' button. The fifth is another system message at 12:04pm: '5 Rush Orders Not Ready' with the same instruction and button. The sixth is a message from 'Demo: Josh Nye OG' at 1:59pm, marked 'UNASSIGNED' with a red status bar. This message includes a placeholder text block and three buttons: 'Assign It', 'Take It', and 'Mark as Closed'. A red 'New Messages' badge is visible on the right side of the interface. At the bottom, there is a text input field with the placeholder 'Type a message and press Return key to send to "Everyone's Notifications"' and a user icon button.

Clicking on Assign It will open the issue and show any past communication with the customer relating to this particular issue. From here you can assign the issue/message and leave a private comment or reply to the customer directly from the issue.

Profile

Preferences

Statistics

Route

Pickup

Notes

Prices

Admin

System

Issue for Josh Nye OG

View Customer

Customer

Josh Nye OG

Show All Issues

Contact Log

Assignee:

Unassigned

Reply to Customer

Add Private Comment

Due date:

sven

Enter a message

Created:

2/11/2019 1:59pm

Customer SMS

Mon 2/11, 1:59pm

Updated:

2/11/2019 1:59pm

>Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nam fermentum interdum est sit amet consectetur. Nulla iaculis consequat magna vel euismod. Cras semper sem dui, ac eleifend ipsum feugiat non. Sed vulputate vestibulum nulla nec scelerisque. In hac habitasse platea dictumst. Fusce convallis lorem tortor, et elementum felis convallis et. Vestibulum vel ligula sed erat cursus sagittis vitae eu ante. Fusce dolor quam, pulvinar non sagittis eu, luctus non felis.

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Save

Mark as Closed

Profile

Preferences

Statistics

Route

Pickup

Notes

Prices

Admin

System

Issue for Josh Nye OG

View Customer

Customer

Josh Nye OG

Show All Issues

Contact Log

Assignee:

Sven E

Reply to Customer

Add Private Comment

Due date:

Feb 11, 2019 1:59 PM

Assigning to Sven, he needs to fix the customer's issue.

Created:

2/11/2019 1:59pm

Customer SMS

Mon 2/11, 1:59pm

Updated:

2/11/2019 1:59pm

>Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nam fermentum interdum est sit amet consectetur. Nulla iaculis consequat magna vel euismod. Cras semper sem dui, ac eleifend ipsum feugiat non. Sed vulputate vestibulum nulla nec scelerisque. In hac habitasse platea dictumst. Fusce convallis lorem tortor, et elementum felis convallis et. Vestibulum vel ligula sed erat cursus sagittis vitae eu ante. Fusce dolor quam, pulvinar non sagittis eu, luctus non felis.

Pellentesque pretium lobortis metus, a tincidunt metus porttitor eu. Fusce euismod sapien in est laoreet, nec posuere ex interdum. Donec at consectetur leo. Aenean condimentum ipsum ac libero sollicitudin dignissim. Sed vulputate est purus, sed aliquet felis imperdiet in. Nam accumsan massa metus, at sagittis arcu dictum eu. Pellentesque ornare suscipit dolor, at imperdiet lectus consequat in. Vivamus pharetra, massa quis pellentesque vulputate, ligula magna varius diam, in laoreet enim ante id mauris. Etiam rutrum felis sed diam dictum, nec facilisis arcu tempus.

Save

Mark as Closed

If you need to look at the customer's account to solve the issue, click on the View Customer button and the customer's account will open in a lightbox.

Issue for Josh Nye OG

[View Customer](#)

Customer
Josh Nye OG

Show All Issues Contact Log

Assignee: Sven E

Due date: Feb 11, 2019 1:59 PM

Created: 2/11/2019 1:59pm
Updated: 2/11/2019 2:03pm

[View Changes \(1\)](#)

[Reply to Customer](#) [Add Private Comment](#)

Enter a message

Admin Mon 2/11, 2:03pm
Assigning to Sven, he needs to fix the customer's issue.

Customer SMS Mon 2/11, 1:59pm
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nam fermentum interdum est sit amet consectetur. Nulla iaculis consequat magna vel euismod. Cras semper sem dui, ac eleifend ipsum feugiat non. Sed vulputate vestibulum nulla nec scelerisque. In hac habitasse platea dictumst. Fusce convallis lorem tortor, et elementum felis con vallis et. Vestibulum vel ligula sed erat cursus sagittis vitae eu ante. Fusce dolor quam, pulvinar non sagittis eu, luctus non felis.

Pellentesque pretium lobortis metus, a tincidunt metus porttitor eu. Fusce euismod sapien in est laoreet, nec posuere ex interdum. Donec at consectetur leo. Aenean condimentum ipsum ac libero sollicitudin dignissim. Sed vulputate est purus, sed aliquet felis imperdiet in. Nam accumsan massa metus, at sagittis arcu dictum eu. Pellentesque ornare suscipit dolor, at imperdiet lectus consequat in. Vivamus pharetra, massa quis pellentesque vulputate, ligula magna varius diam, in laoreet enim ante id mauri

[Save](#) [Mark as Closed](#)

Once a message/issue has been assigned it will display who it is assigned to in the feed.

Notifications

- Everyone's Notifications
- Your Notifications

Channels

- All Employees
- SF Route Customers Only
- MARIN Route Customers Only

Direct Messages + New

- ross M

Everyone's Notifications

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ASSIGNED Sven E View Ticket

Type a message and press Return key to send to "Everyone's Notifications"

When an issue has been handled you can click Mark as Closed and it will display to everyone who can see the message in the chat history, while new messages continue to create new issues.

Notifications

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- Your Notifications

Channels

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Direct Messages + New

- ross M

Everyone's Notifications

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ASSIGNED Sven E View Ticket

Type a message and press Return key to send to "Everyone's Notifications"

Quick notes:

- You can quickly access all of your assigned messages by going to the Issue Tracker.
- You can only close a message if it is unassigned or has been assigned to you.
- If a customer sends multiple messages while they have an unresolved issue it will append their messages as comments to the original issue until it is resolved. That way you don't wind up with multiple issues for the same communication.
- If a customer sends a message like Yes or Thanks, that doesn't require anyone's attention, you can use the Resolve button like you used to use the red X button to kill the message.



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