dialogview™

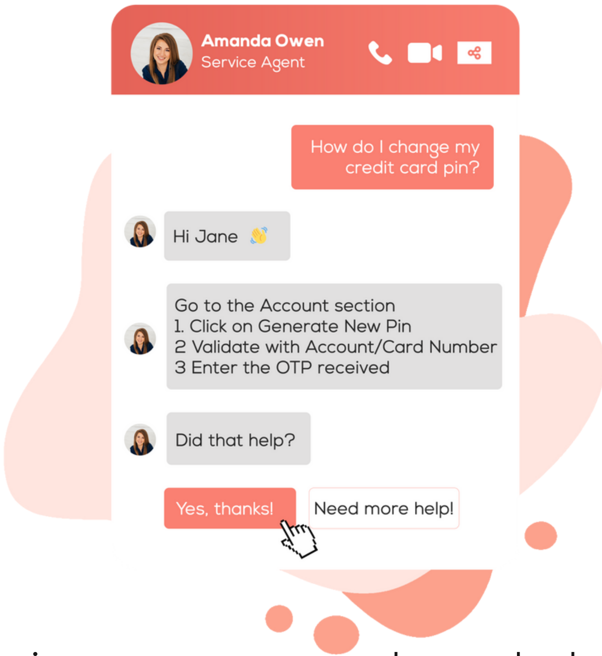
Smart Guide

Direction Manual

1. Functionalities

Live chat

Live chat is a messaging feature that allows customers to chat directly with a service representative. Most enterprises use live chat as part of their SaaS infrastructure, as they realize business chat is one of their must-have customer engagement element.



Live chat provides immediate service to customers through their website. It helps to efficiently communicate using audio, video, and screen share facility.

Canned Responses

Canned responses are pre-programmed messages that allow support agents to respond quickly to the customer and save time on frequently asked questions by picking saved responses with just a few keystrokes.

A canned response efficiently eliminates the time spent repeating and rephrasing answers to the FAQs. Dialogview can define an unlimited number of canned responses and can be accessed by all agents in general.

Document Repository

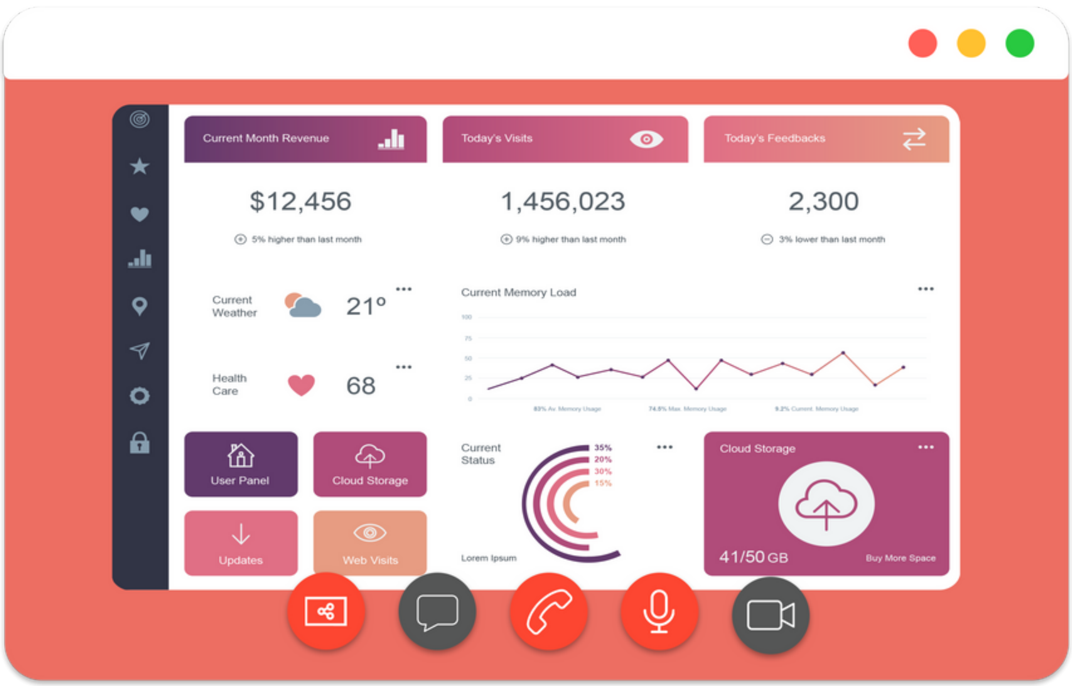
Keeping your business's documents organized and securely stored can be complicated and overwhelming, with seemingly endless options for digital document storage and organization. The document repository is an efficient way to save space and protect your essential files in a single digital space.

Dialogview document repository can function as part of a document management system and provides an easy, secure way to store all customer and agent documents in one centralized location.

Screen Sharing

Screen share is the practice of sharing your screen with a user(s). Screen sharing can also be limited to an application to avoid sharing everything on the sharer’s desktop.

Screenshare feature in dialogview helps to share a particular content or the whole screen with a customer. In a real-time scenario, a client can fill a registration form through screen share with an agent.



Audio Call

People communicate through various channels that are convenient for them. While some prefer a phone call, others like to have the comfort of text chats. Traditional text chats at times create ambiguity and fail in conveying the correct perception.

Text chats often compromise the confidentiality of a conversation resulting in the loss of customers. Dialogview introduced audio calls for users to pass reliable messages by helping businesses to get more personal with their customers.

Video Call

In an era where most employees work remotely, getting in touch with them regularly is necessary to check their work progress. With the advent of computers, internet connection, and efficient virtual communication solutions, it is possible to have real-time communication with individuals or a group of people from different locations.

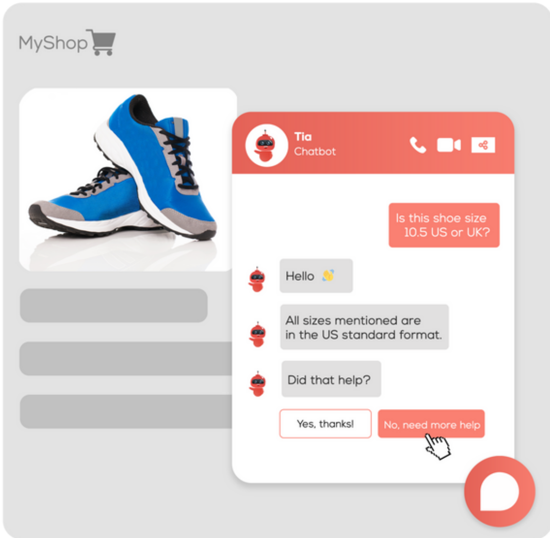
Dialogview has enabled an alternative solution for effective communication that helps you connect face-to-face with customers securely, from anywhere around the world.

Without the need for any third-party downloads/plugins, Dialogview enables customers to connect with agents in just one click from a live chat conversation.

Intuitive bot

An NLP-driven software program that performs automated tasks. Bots typically acquire human behavior and operate much faster than them.

The intuitive bot is available 24/7 and can handle numerous requests at the same time. Businesses know what their customers talk about and the problems they encounter. Dialogview gives them an arena to add as many tags as required to make conversations meaningful.



Omnichannel Integration

Omnichannel provides multi-channel customer support on popular messaging apps under one platform.

The setup and execution of the omnichannel process flow drive the rest of the customer experience.

A well-functioning omnichannel process flow, including streamlined storage and delivery processes, guarantees that the company can execute its commitments and promote productivity and long-term performance.

Real-Time Conferencing

Real-time conferencing allows an agent and a user to connect instantly by means of audio or video calls. They can have calls in between the conversation. If the agent wants to add a guest to the call, they can invite them via SMS or Mail. A maximum of 6 guests can be added to the call.

Scheduled Conferencing

Scheduled conferencing allows an agent to schedule a meeting for guests and the members of the company. There is no specified limitation for the number of members to be added.

The Admin/Manager/Agent can schedule meetings with a fixed date and time, also who all are invited to the meeting can join with a link or code. When the meetings are scheduled, a link will be sent to their mail id.

2. User Manual

Getting Started

Onboarding a company into Dialogview is a straightforward process. To get started with Dialogview, the following details must be provided:

1. The Name of the Company
2. Email associated with the company
3. The Company Website
4. Company Contact Number

These details would get the company registered on the platform. The next step would be to onboard an Admin from the company so they can log in to the Dialogview Agent Portal. The following details are to be captured to onboard an

Admin:

1. First Name of the Admin
2. Last Name of the Admin
3. Email ID of the Admin
4. Contact Number

A link will be sent to the Admin email to set a password and log in to the Dialogview Agent Portal.

The Agent portal gives access to all comprehensive features of Dialogview.

The Admin will be able to add new agents, view the conversation queue, add canned responses, manage users and customize the Chat Bot.

As soon as the admin gets access to the portal, they can integrate the chatbot into their website.

To get the integration done, the platform provides a snippet of code that can be added to the HTML section of the webpage.

After this, the chatbot becomes visible on the webpage, and customers can use them.

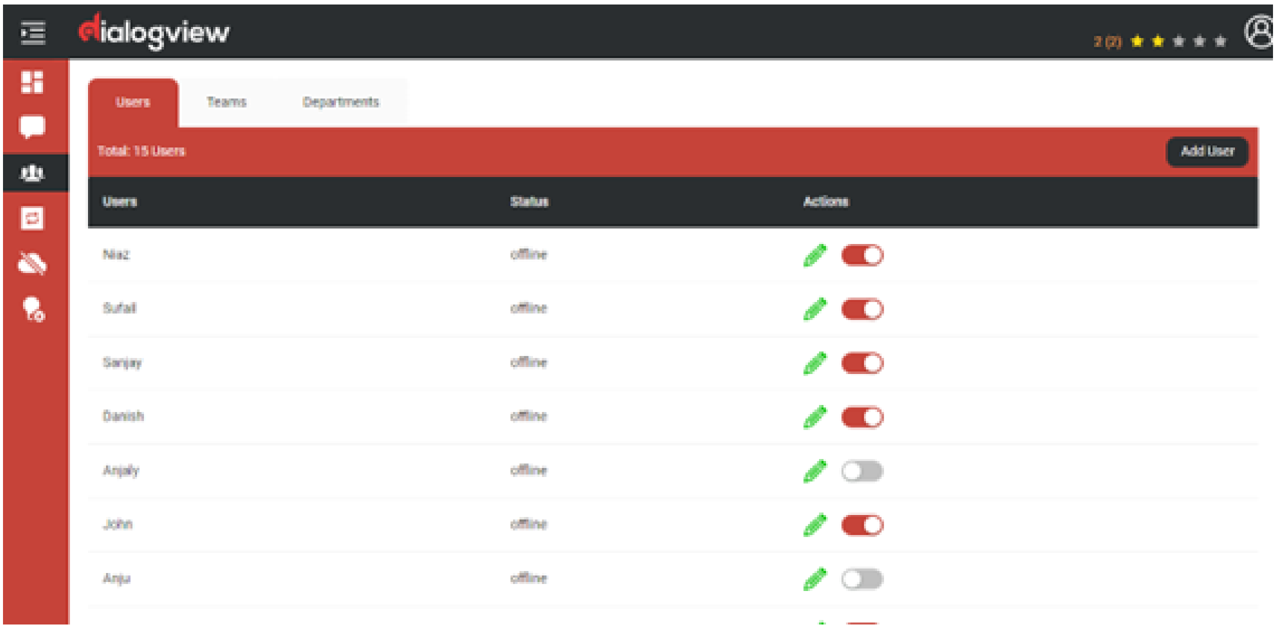
User Management:

After the Chatbot is integrated, the next step would be to add Agents to the platform. This is done by going to the User Management section. This section enables the Admin to add more roles to the platform like :

- Admin
- Agent
- Manager

Admin and **Managers** can create **Users, Teams,** and **Departments**.

A department can consist of multiple teams, where each team can have various users (service agents).



Create Users

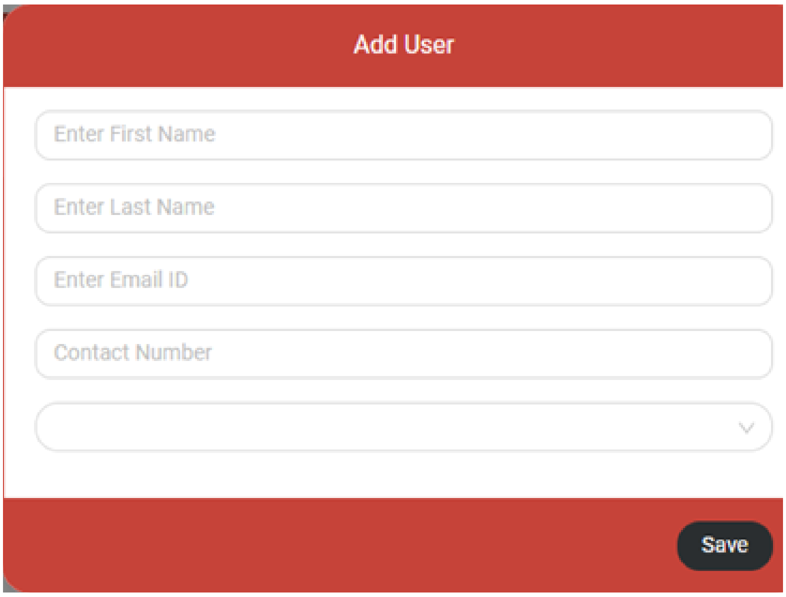
To create a user, navigate to **User Management>Users** and click **Add User**.

Now you will be able to enter the user's **First Name, Last Name, Email Address,** and **Contact Number**.

After entering the details, select the **role** of the specified user from the selection field below **Contact Number** and click **Save**.

Now the agent will receive an email containing a link to create their password.

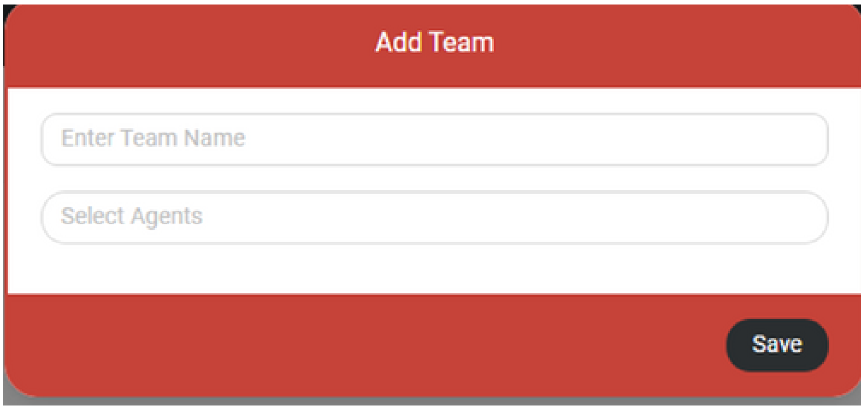
After setting the password, they will be redirected to their login page, where the user can sign in using the email provided by you at the time of user creation.



Create Teams

To add teams, navigate to
User Management>Teams and click **Add Team**.

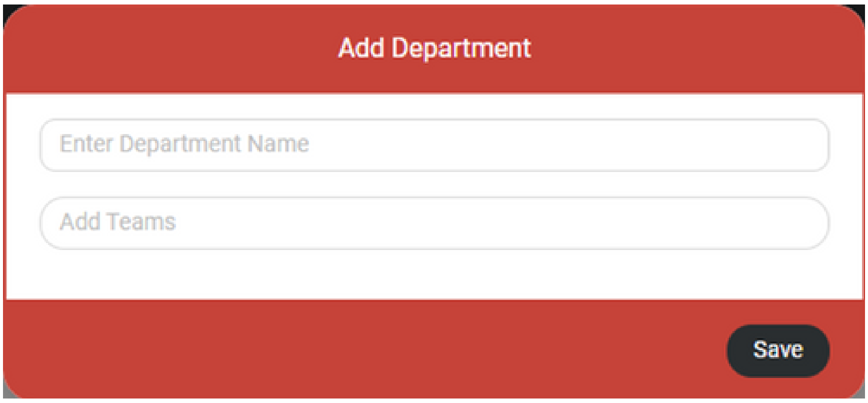
Now the user will be able to enter their **Team Name** and **Select Agents** that will be assigned to the team, then save it.



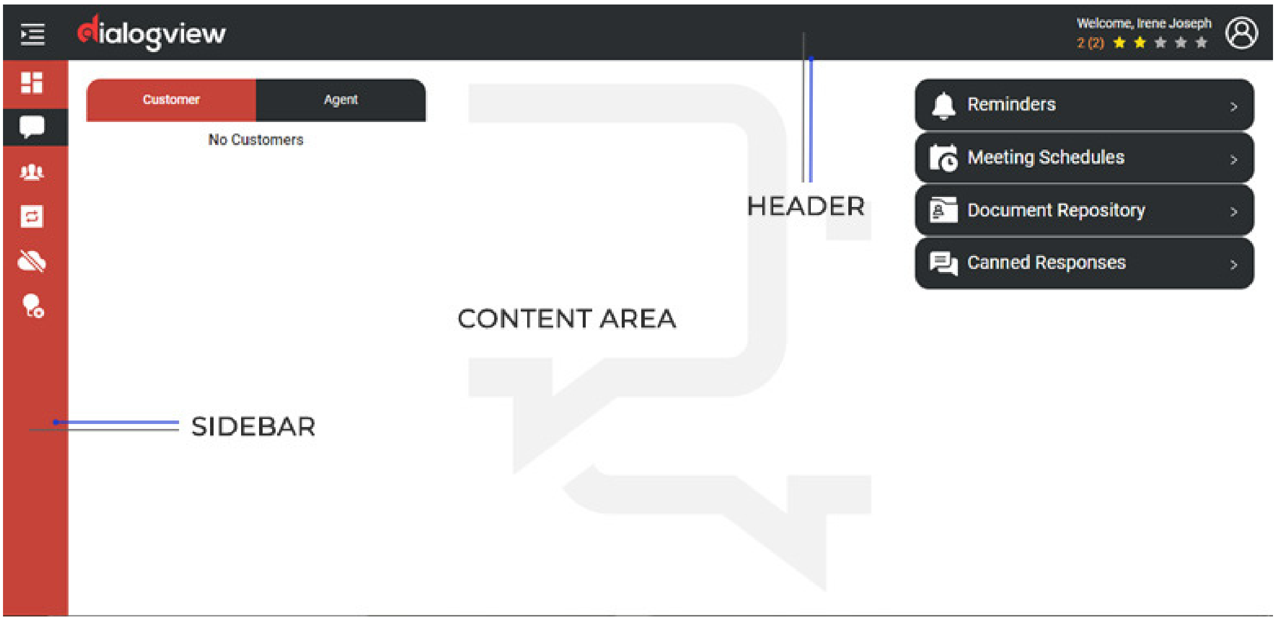
Create Departments

To add Departments, navigate to
User Management>Departments and click **Add Department.**

Here you can enter the **Department Name, Add Teams**, and save it



Agent Console Navigation



Header

The header of the platform will have a **Hamburger Menu**, and a **Profile Menu**.

Hamburger Menu is an icon used on a website and in apps that, when clicked or tapped, opens a side menu or navigation drawer.

Profile Menu includes **Manage Profile, Administration, Sign Out**.

Manage Profile includes **Profile picture, First name, Last name, Email ID, Phone Number, Role** and **Softphone Routing**.

It allows an **Admin/Manager** to customize **Profile Picture, First name, Last name,** and **Phone Number**.

Administration allows a user to customize the w, and Chat Configuration of the platform.

Sign Out allows a user to disconnect from the Dialogview.

Sidebar

The sidebar will display Dashboard, Conversations, User Management, Integration window, Offline and Canned Responses.

You can toggle the menu by clicking the hamburger menu icon, showing the tab icons along with its name.

The dashboard window provides a comprehensive overview of customer support and displays Conversations, Agents/Teams Count, Customers Count, Conversations Attended, Agent Rating, Conversation/Hour Statistics, and Conversation History.

The **conversation** screen allows users to engage with customers through **Chat, Audio & Video Calls,** and **Screenshare**.

It includes **Reminders, Meeting Schedules, Document Repository,** and **Canned Responses**.

The **user Management** window allows **Admin/Manager** to add **Users, Teams,** and **Departments**.

The integration window allows the integration of Chatbot, SMS, Voice Calls, and Social Media Platforms like Facebook and WhatsApp.

The Offline screen includes the list of customers unattended when agents were offline or unavailable.

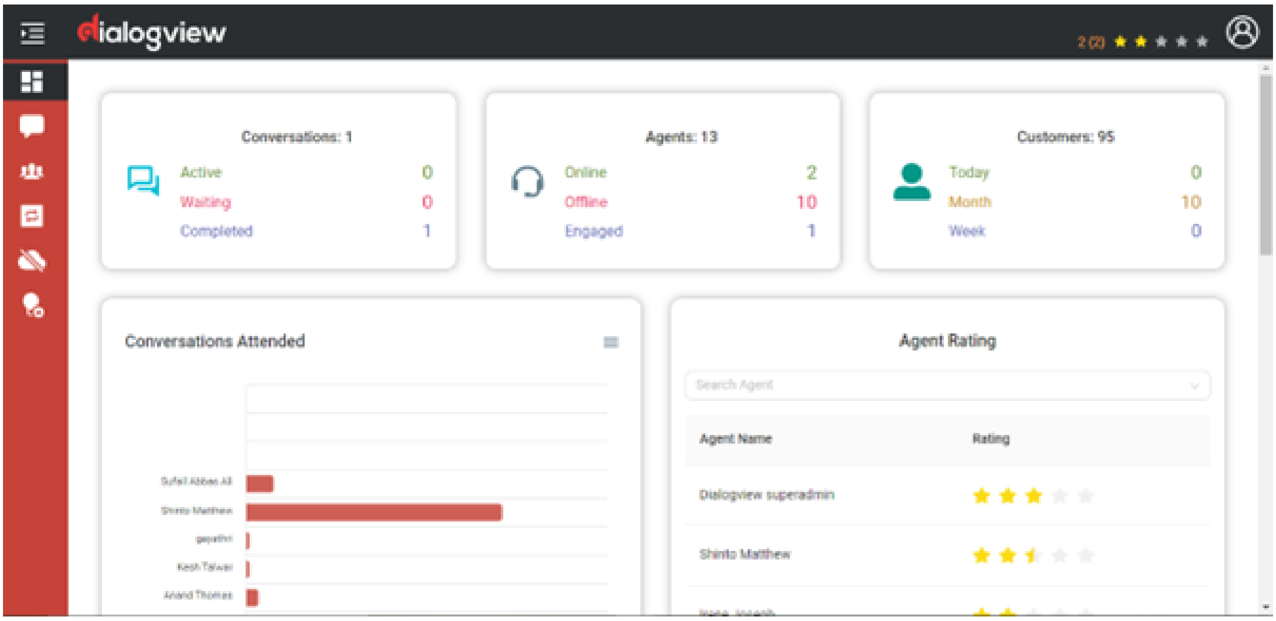
The customer can enter the following details for the agents to reach out to them - Customer Name, Date, Preference, Conversation, and Action.

Canned Responses allow the agents/admin/ manager to add predictable questions that maybe asked by a customer and the answers for it.

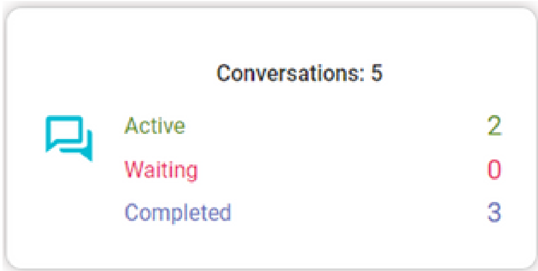
Dialogview Overview

Dashboard Window

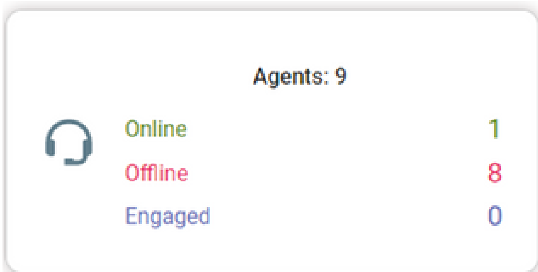
The dashboard window provides a comprehensive overview of customer support and displays **Conversations, Agents Count, Customers Count, Conversations Attended, Agent Rating, Conversation/Hour Statistics,** and **Conversation History.**



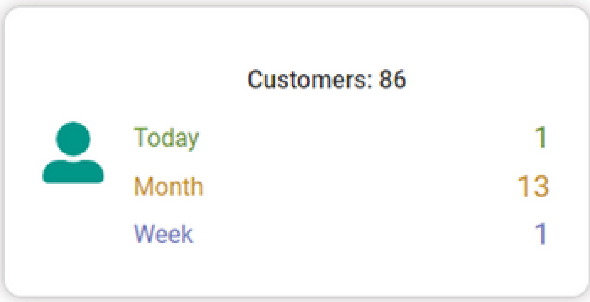
Conversations shows the number of **Active, Waiting** and **Completed conversations** by an agent.



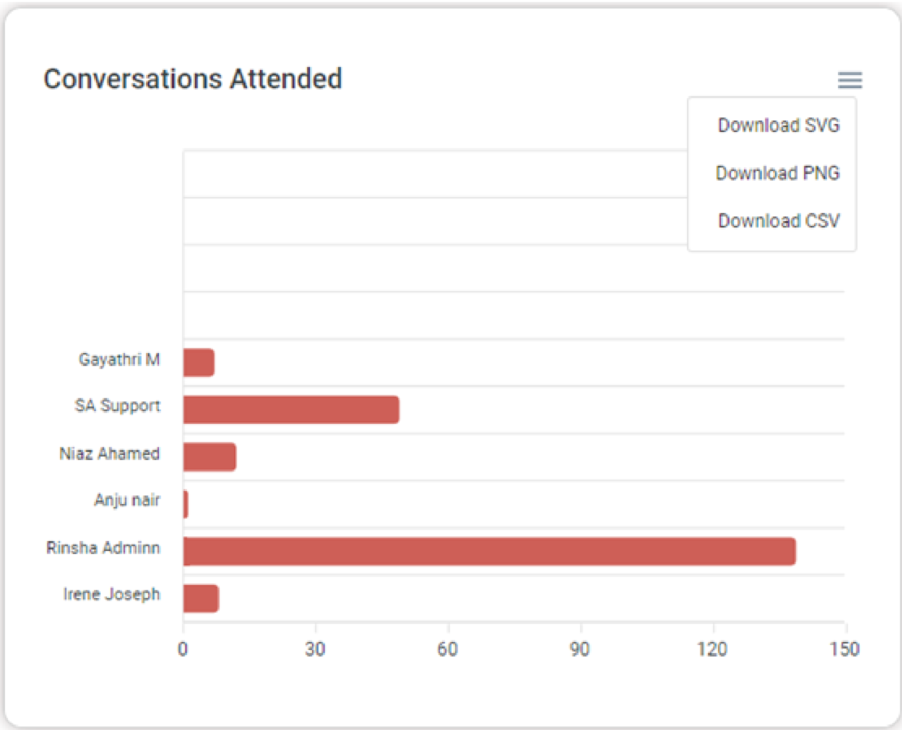
Agents Count shows the number of agents who are **Online, Offline** and **Engaged**.



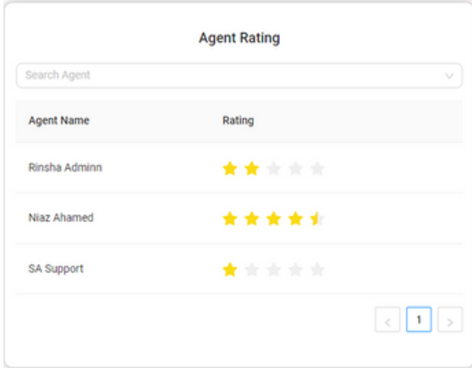
Customers Count provides the number of customers interacted with the platform **today**, in the **week** and in the **month**.



Conversations Attended - This graph contains the statistic report of conversations handled by each agent. The graph report can be downloaded in various formats like SVG, PNG, CSV.



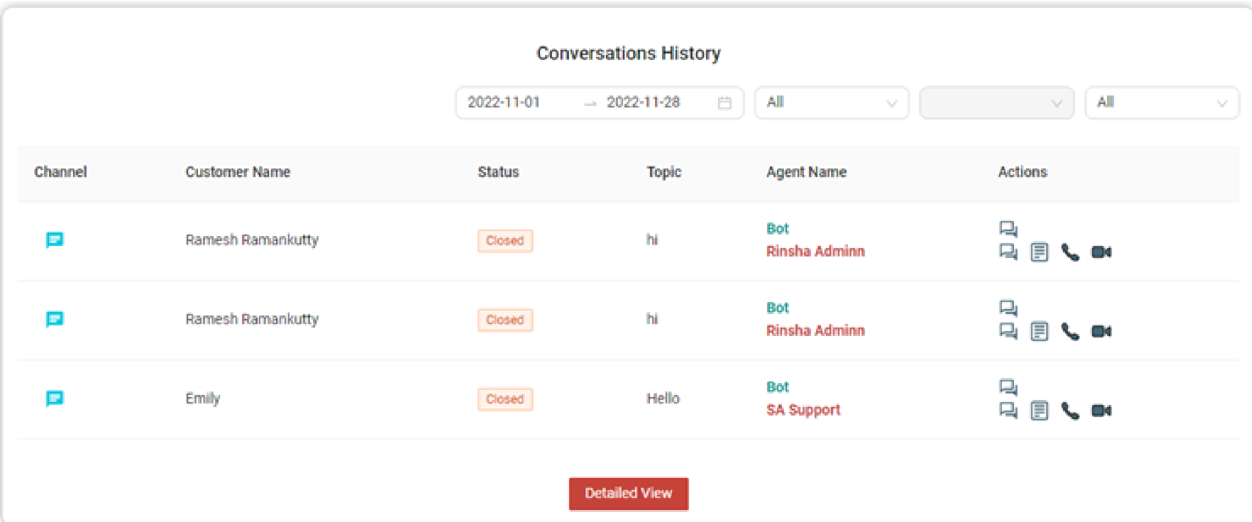
Agent Rating will show the rating of each agent, also there is a search option.



Conversation/Hour Statistics shows the **Web Conversations, Facebook Conversations** and **Total Conversations.**

Conversation History provides a detailed view of the conversation history along with the **Channel, Customer Name, Status, Topic, Agent Name** and **Actions**.

Channel -

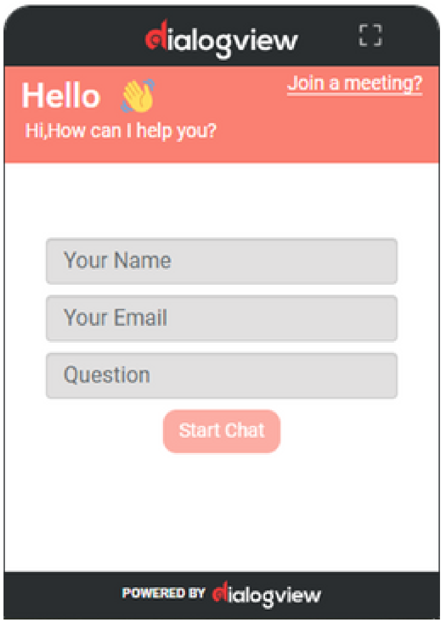


Conversation Window

Customer Side Window

The user can enter their **Name, Email** and the **Question** they want to ask.

The bot will answer firstly and if the user needs an agent, just type Agent keyword.



Audio Call – The user can start an audio call in the following steps, click on the **Phone Icon** and allow **permission** to access your microphone.

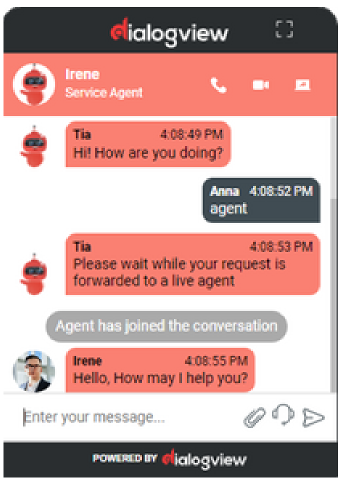
In the **Audio call**, the following options are available **Mute/Unmute**, **Chat** and **End call**.

Video Call – The user can start a **video call** in the following steps, click on the **Video Icon** and allow **permission** to access your microphone and camera.

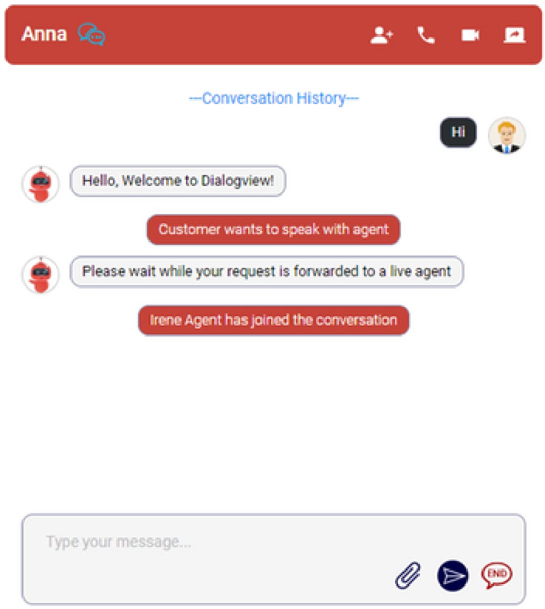
In the **Video call**, the following options are available **Mute/Unmute, Video On/Off, Screenshare, Chat** and **End call.**

Screenshare – The user can share the screen while Chat and Video call

Attachment – The user can attach documents and send to the agent by clicking on the Attachment Icon.



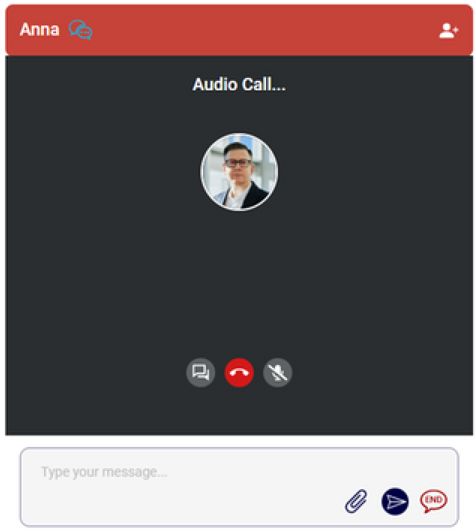
Agent Side Window



The **Conversation** screen allows users to engage with customers through **Web Chat, Video, Audio Calls, Conference Calls,** and **Screen Share** facility.

The **top bar** of the conversation window will display **Add User, Audio Call, Video Call,** and **Screen Share** icons.

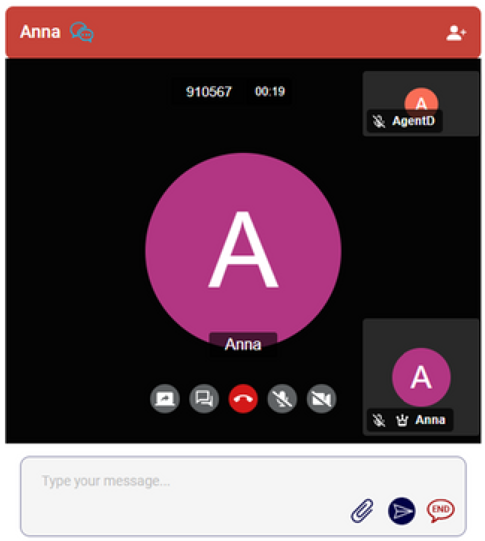
Initiate Audio Call



To initiate an Audio Call, click on the Phone Icon, and allow permission to access your Microphone.

Also, the agent can invite a maximum of 6 guests to the call.

Initiate Video Call



To initiate a **Video Call**, click on the **Camera Icon**, and allow **permission** to access your **Microphone** and **Camera**.

The agents can add a maximum of 6 guests to the call and can also screenshare the screen.

To add a **guest** to a **video/audio** conversation, click on the **User Icon**, displaying two options: **SMS** and **Email**.

The **SMS** option will allow to send a message and the **Email** option will allow to send a mail containing a link to the discussion along with a **Meeting ID**, **Passcode**, and **Joining** instructions

.

To join the **Active Call**, the guest will have to visit your website, click the **Join Active Room** button in the chat window, and enter their **Meeting ID**.

If the user wants to join through phone, he/she can use **Dial-in-number** to enter the meeting with the **meeting ID.**

Meeting ID, Passcode, Joining Instructions

Initiate Screenshare

To initiate a **Screen Share**, click on the Screen Icon and select the **screen** you want to share while permitting access to your **Microphone**.

Screen share can be initiated while the agent is on an Audio or Video call.

To end a screen share, click on the **Screen Icon** again or hit the **Stop Share** button at the bottom of the screen.

Chatbox

The Chatbox allows the agents to have chat conversations with the customer.

Chatbox includes fields: - **Type your message** area, **Attachment Icon, Send Icon,** and **End Conversation Icon.**

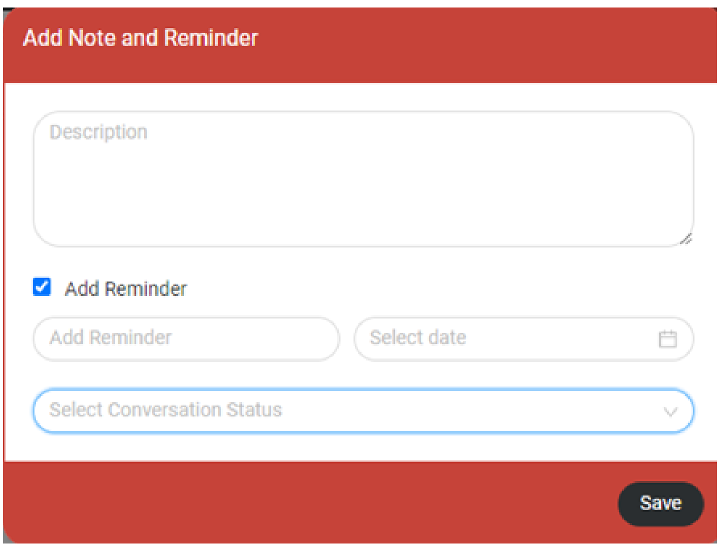
Type you message area shows the chat entered by the agent.

The **attachment Icon** allows the agents to **attach** any documents or files.

Send Icon allows the agents to send the message typed.

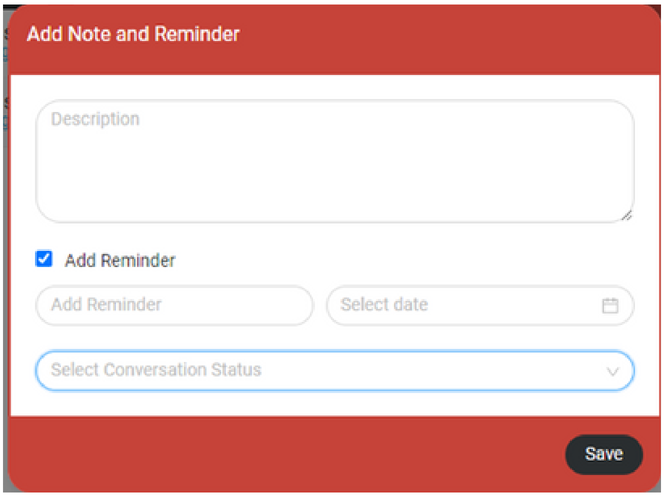
Clicking on the **End Conversation** icon in the chat box to end a conversation.

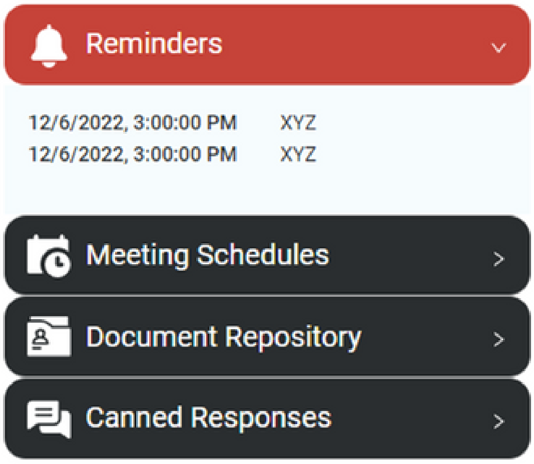
If any note and reminder is to be added, Type in the **Description field>Select the box with add reminder>Add Reminder>Select Date>Select Conversation Status>Click Save.**



Reminder Accordion

After ending the conversation with a customer, a pop-up appears where the agent can add **Notes and Reminders**. The pop-up will include **Notes, Reminder Name, Date, Time,** and **Conversation Status.**



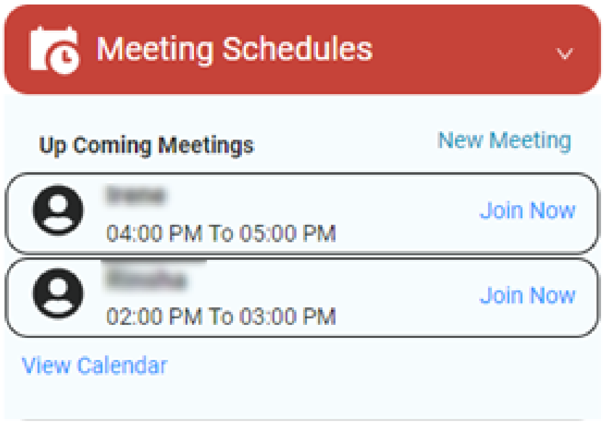


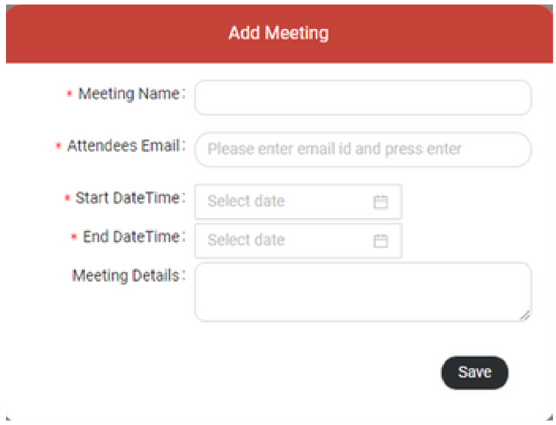
Meeting Schedules

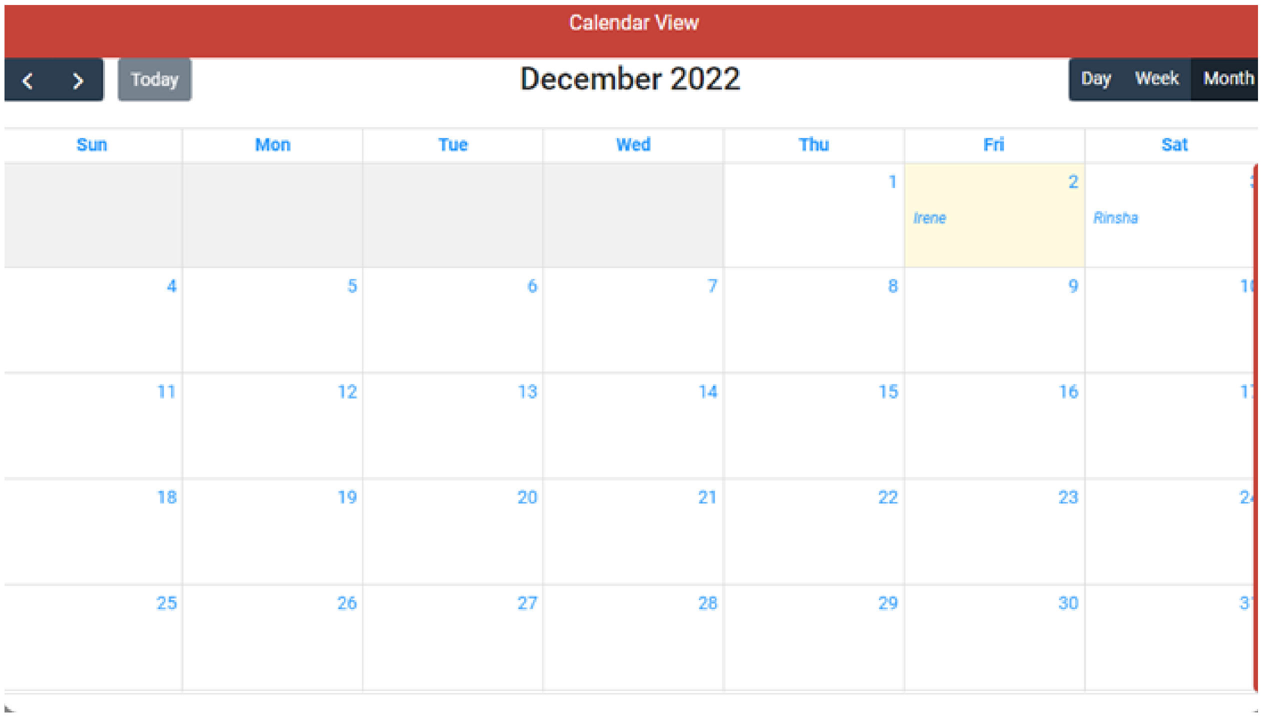
Meeting Schedules allows an agent to schedule a meeting for guests and the members of the company. There is no specified limitation for the number of members to be added.

The **Admin/Manager/Agent** can schedule meetings with a fixed date and time, also who all are invited to the meeting can join with a link or code. When the meetings are scheduled, a link will be sent to their mail id.

To schedule a meeting with customers, navigate to the Meeting Schedules window on the Conversation page and click the New Meeting button. Then enter Meeting Name>Attendees Email>Start Date Time>End Date Time>Meeting Details>Save.







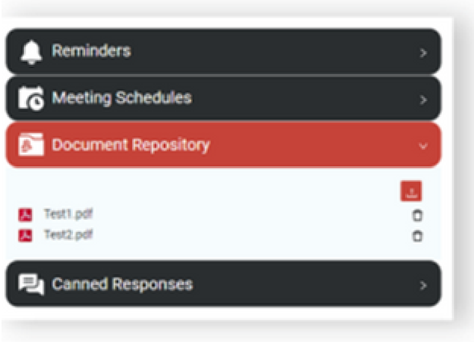
The guest can join the meeting via the link send via entering the passcode.

Document Repository

Document Repository allows an agent to upload documents that agents can utilize while conversing with the user.

Agents can upload Customer Service Scripts, PowerPoint Presentation, Demo Video, Pricing Details, User Manual, or any file they can utilize.

Note: The documents uploaded by customers won't be available in the repository.



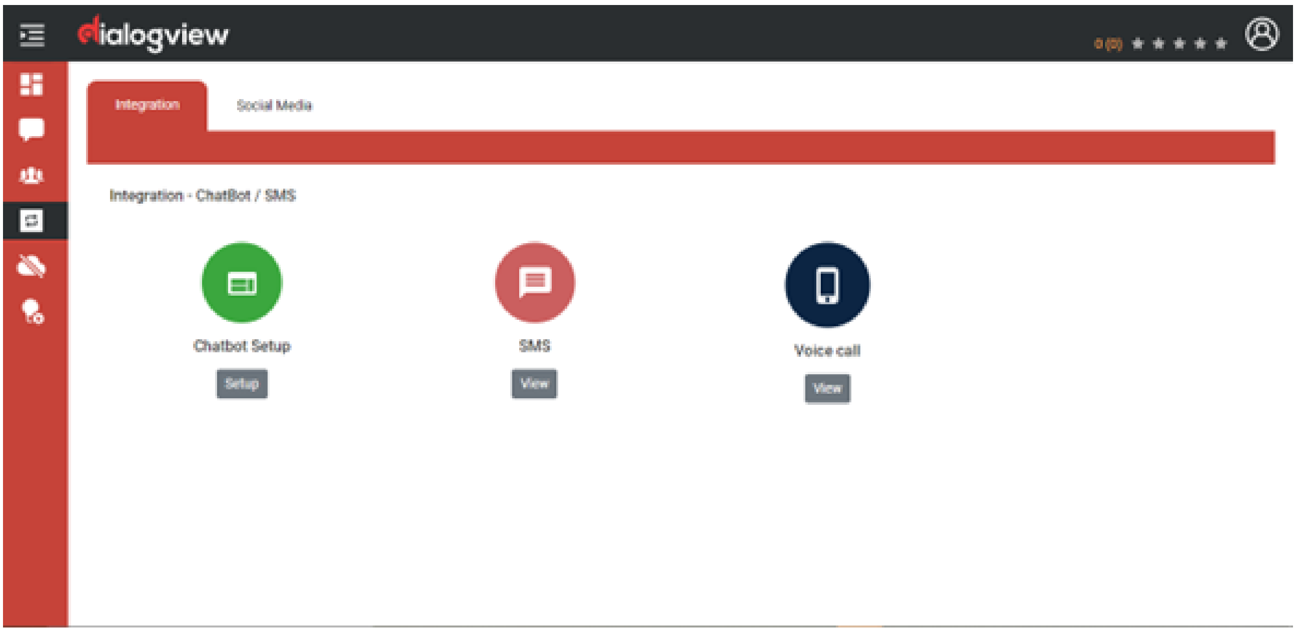
To **Upload Document**, navigate to **Document Repository** in the **Conversation Window** and click the **Upload** icon to upload documents to the repository. Select the document you wish to upload and click **Open**.

The uploaded document is used for any reference purpose for the agent.

Integration Window

The integration window provides integration details regarding the **Chatbot, SMS, Phone Number** and **Social Media** like **Facebook Messenger** and **WhatsApp**.

Only the **Admin** have the access to the Integration Window.



Chatbot Setup

For Chatbot Setup,

- Click on "Chatbot Setup."
- Snippet of code is available here
- Copy the code & paste it inside the website's HTML body

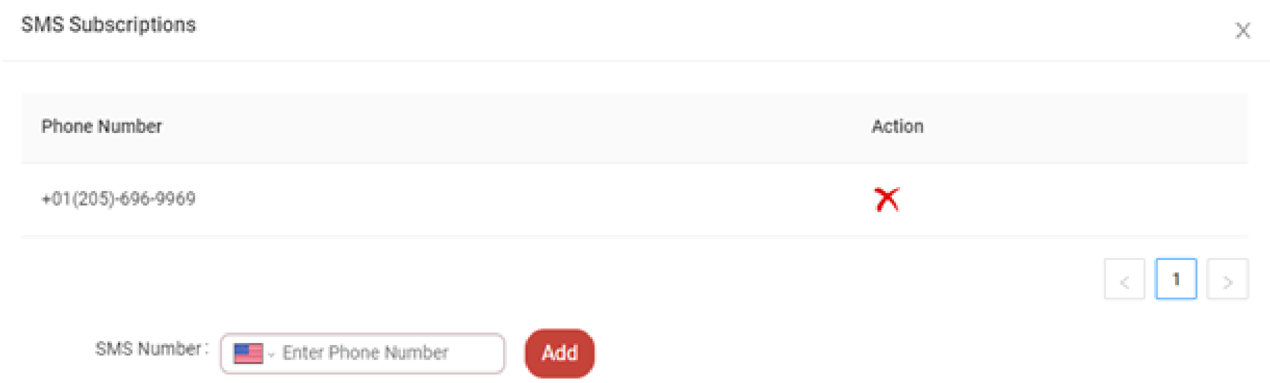
Now the Chat Bot will be available on the website.

SMS Setup

For SMS integration, **Select Integrate>Select Nationality>Enter Phone Number>Click Add.**

If the admin/manager wants to add more phone [numbers, follow the above steps again.

The admin can delete the number if not needed by clicking the Delete Icon.



Note: - When the number is added, the field Integrate will be changed to View.

Voice Call

In the **Voice Call Integration module**, the **SIP Integration** means the main number to which the calls of the customer are to be landed can be added to Dilaogview from the session.

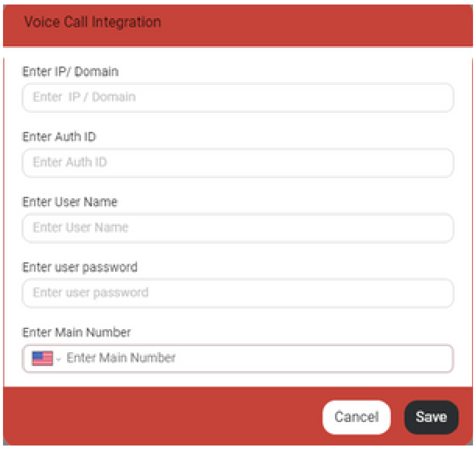
The number can be integrated into Dialogview by following steps: -

For Voice Call Integration, Select Integrate>Add>Enter IP/Domain>Enter Auth ID>Enter Username>Enter User Password>Select Nationality>Enter Main Number.

If the admin/manager wants to add more phone numbers, follow the above steps again.

The admin can delete the number if not needed by clicking the Delete Icon or can edit the number by clicking Edit Icon.

Note: - When the number is added, the field Integrate will be changed to View.



Social Media

In the **Social Media** option, **Facebook** messenger and **WhatsApp** can be integrated.

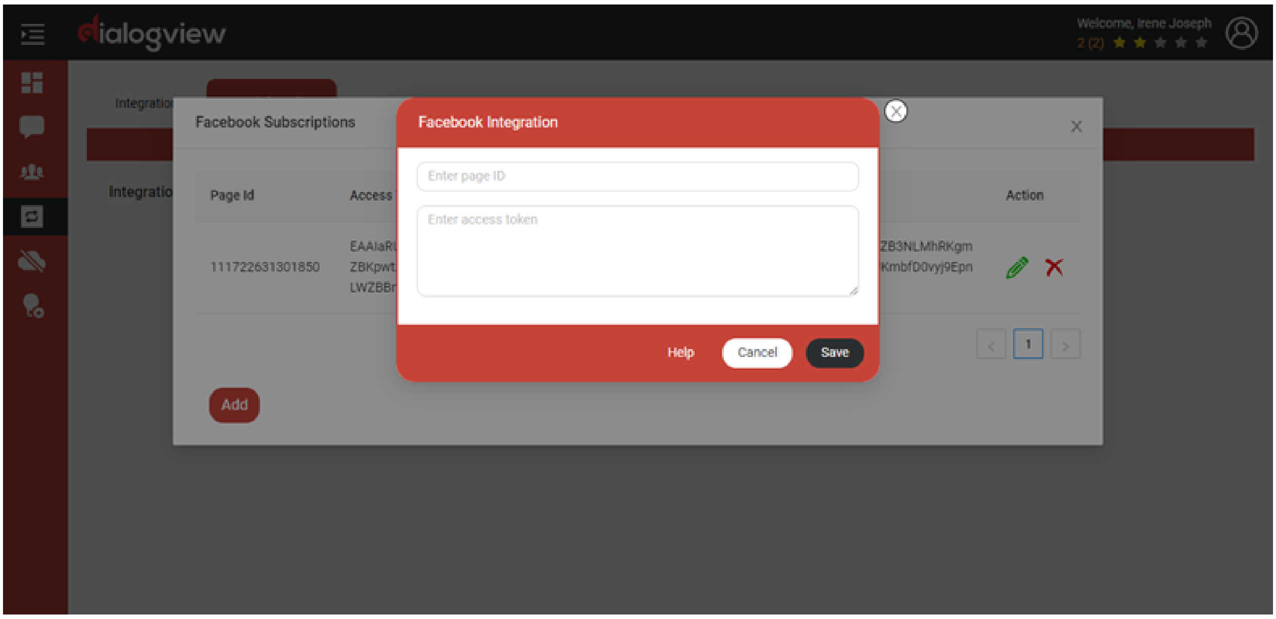
To integrate Facebook: -

Click **Integrate>Add>Enter Page ID>Enter Access Token>Save.**

If the user wants to add more accounts, follow the above steps again.

The field **Help** will allow the admin to integrate the Facebook account easily.

The admin can delete the Facebook account if not needed by clicking the **Delete** Icon or can edit the account by clicking the **Edit** Icon.



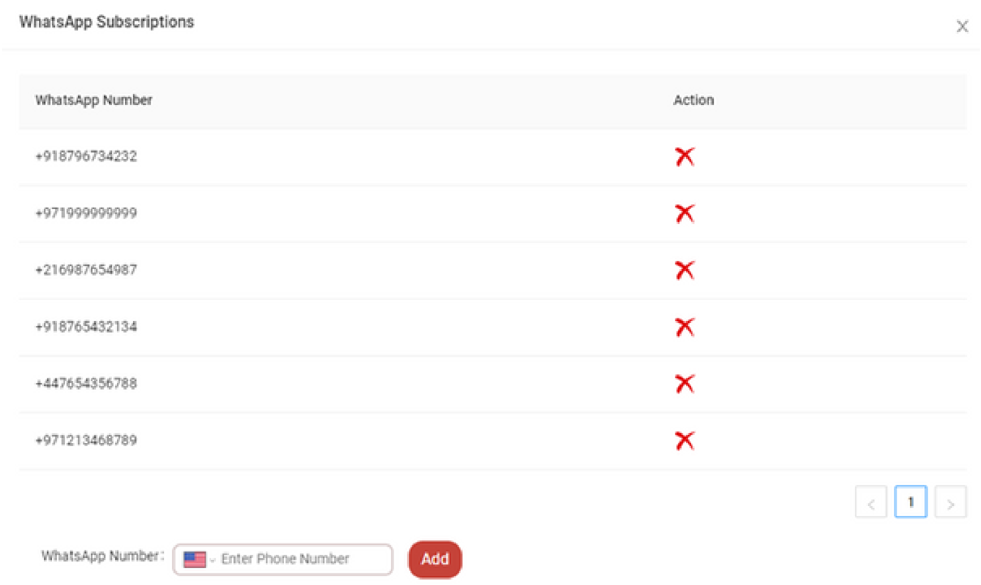
Note: - When the Facebook account is added, the field Integrate will be changed to View.

To integrate **WhatsApp**: -
Click **Integrate>Select the Nationality>Enter Phone Number>Add.**

If the user wants to add more accounts, follow the above steps again.

The admin can delete the Facebook account if not needed by clicking the **Delete** Icon.

Add more details on difference between "**Integrate**" and "**View**".



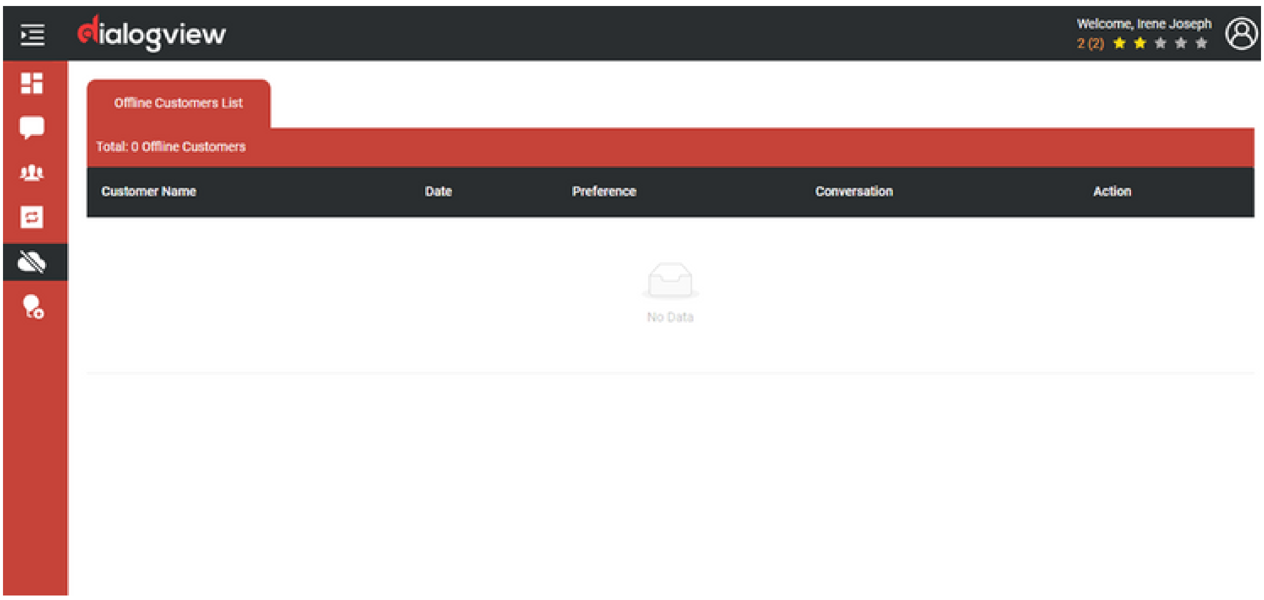
Note: - When the WhatsApp account is added, the field Integrate will be changed to View.

Offline Customers

The offline customer list will be seen in the **Offline** tab.

The **Offline** screen details of customers like **Customer Name, Date, Preference** on how they would like to get a response, **Conversation**, and an **Action** button.

It lists the number of customers who tried to reach out to an agent when no agents were online.

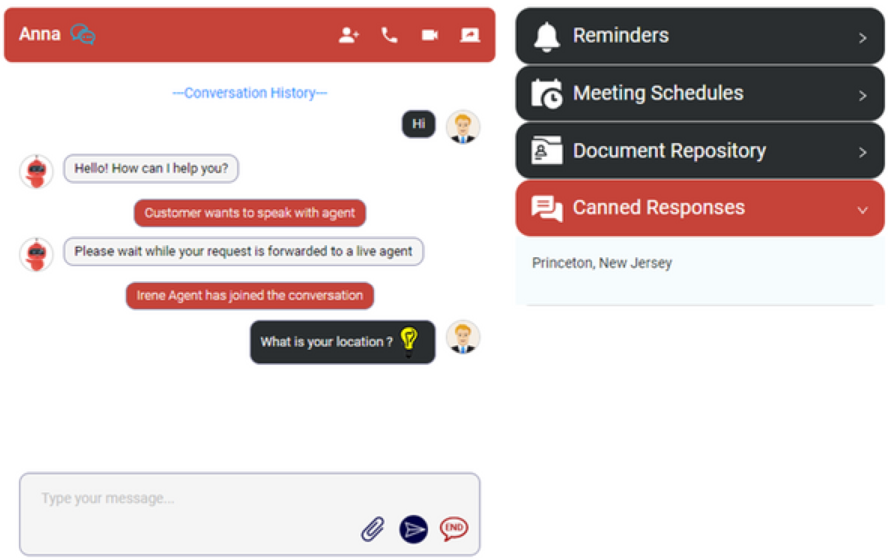


Canned Response

Canned Responses allow an agent to respond quickly to the frequent questions asked by a user to common queries, such as welcome messages and responses to repetitive questions.

A Light Bulb icon will pop above the customer message in the Conversation window when a customer asks a question containing the added keyword.

The user will be able to respond to the query by selecting the answer in the Canned Response window and if the agent wants to edit/add any additional information it can be done.

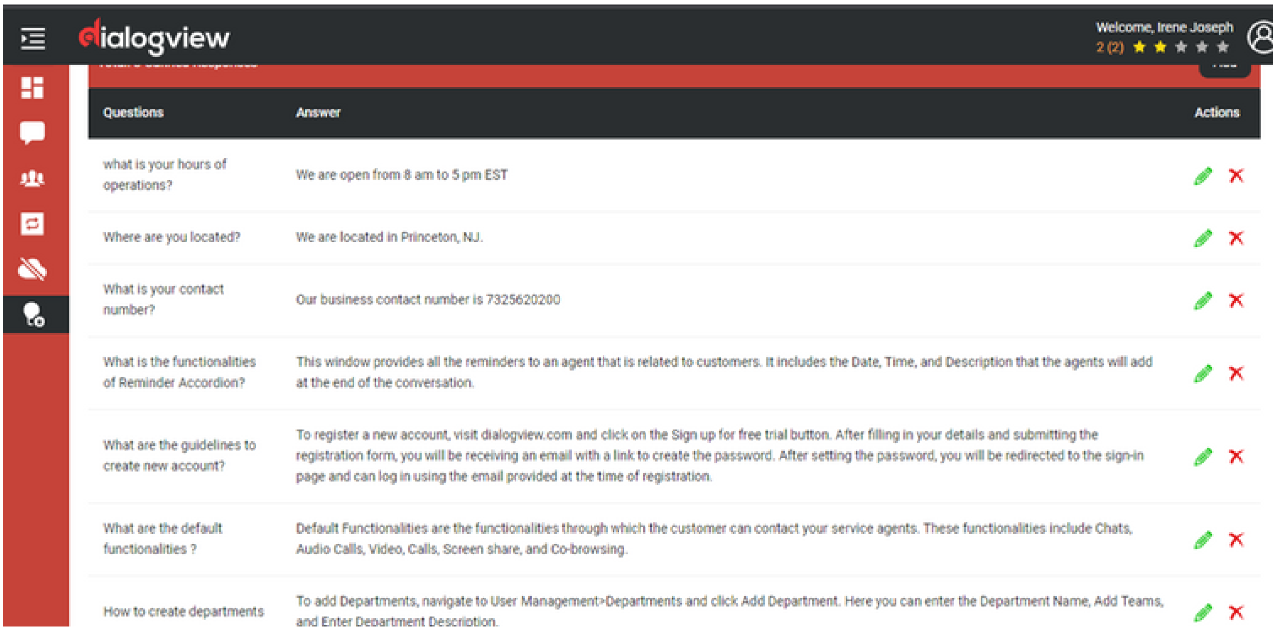


To add a Canned Response, navigate to **Hamburger Menu>Canned Responses** and click **Add** button.

Here the user will be able to enter the Question and the Answer to that question.

Below given is the list view of canned responses with fields – Questions, Answer, and Actions.

In Actions, the questions and answers can be edited when clicking the Edit Icon or can be deleted when clicking the Delete Icon.

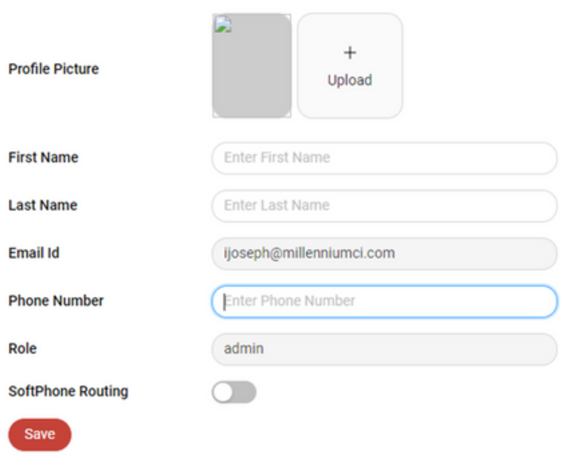


The agents can quickly respond when these questions are asked by the customers.

Manage Profile

To customize the profile of the user, follow the steps below: -

To upload **Profile** icon, **Top right corner>Manage Profile> Click on upload > Select image.**



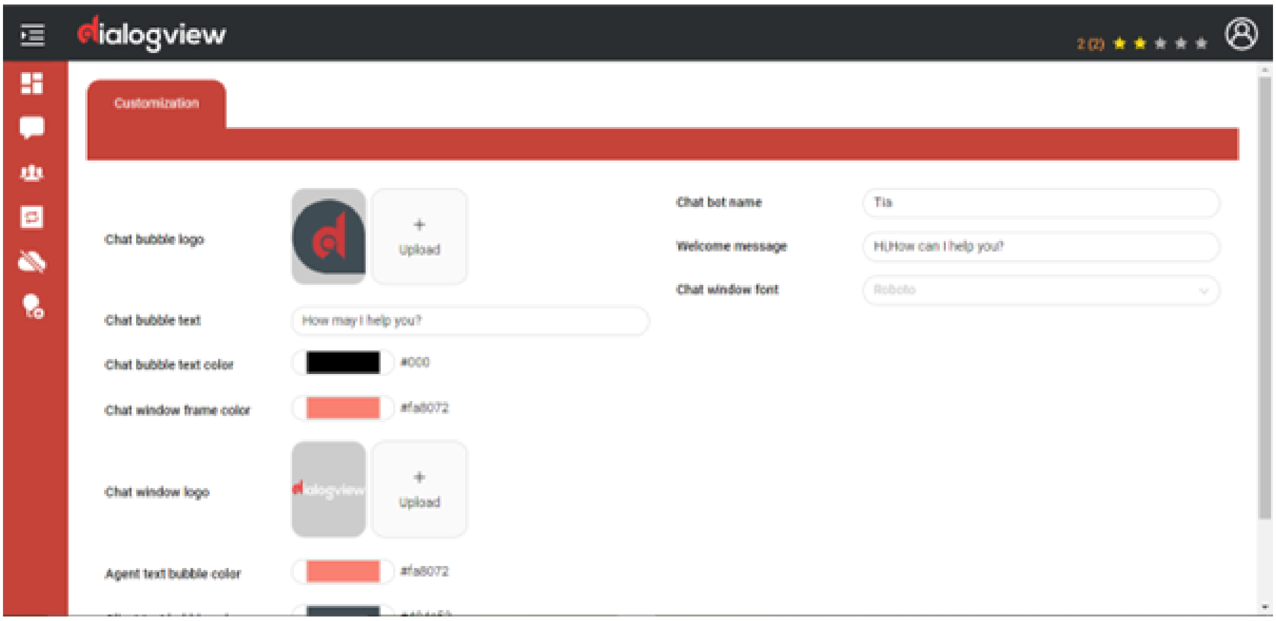
To update the **First Name Last Name, and Phone Number,** navigate to **Top right corner>Manage Profile.**

To enable **Softphone Routing, Top right corner>Manage Profile>Softphone Routing>Enable Button.**

Note: - Email Id and Role cannot be changed, as it is created in the initial stage of creating the account.
After the changes, Click Save.

Chat Window Customization

To customize the appearance and default message of the chat window, click **Profile** Icon on the top right corner of the window and select **Administration**.



·Chat Bubble Logo – To change the logo of chat bubble, navigate to **Profile Icon > Administration> Chat Bubble Logo>Upload.**

Chat Bubble Text – To change the text aligned with the chat bubble, navigate to **Profile Icon>Administration>Chat Bubble Text> Type the new one.**

Chat Bubble Text Color – To change the color of the text aligned with the chat bubble, navigate to **Profile Icon>Administration>Chat Bubble Text Color> Select.**

Client Bubble Text Color – To change the text color of client message, navigate to **Profile Icon>Administration>Client Bubble Text Color> Select.**

Chat Bot Name – To change the chatbot name, navigate to **Profile Icon>Administration>Chat Bot Name>Change**.

Welcome Message – The welcome message can be changed accordingly. To change the message, navigate to **profile Icon>Administration>Welcome Message>Change**.

Chat Window Font – To change the font on the chat window, navigate to Profile Icon>Administration>Chat Window Font >Select Font.

After the changed, click **Submit**. If further changes are needed, click **Reset** Customization.

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