Comm100

Getting Started Guide

Live Chat and Ticketing & Messaging

Introduction

This guide will help you get started by configuring the Comm100 Live Chat and Ticketing & Messaging to suit your needs, as well as pointing you in the direction of different things to review before you go live.

Work through each section step by step. To configure each area, you will need to decide on the features and configuration you wish to use. Once you have worked through the guide, you'll be ready to launch.

Step 1: Set a go-live aim date for Live Chat and Ticketing & Messaging

If you've bought both Live Chat and Ticketing & Messaging functions within our platform, you might choose to either:

- Go live with Live Chat and Ticketing & Messaging at the same time
- Go live in phases, launching channels one-by-one

Go-live plan	**Advantages**	**Disadvantages**
Go live with Live Chat and Ticketing & Messaging at the same time	Faster time to go live	The learning curve can be more challenging – staff have to learn all channels at the same time
Go live in phases, launching channels one-by-one	The learning curve can be easier – staff get used to one channel before attempting to master another Learn from experiences of launching one channel before attempting others	It lowers the time to go live

What about AI?

If you are integrating our entire platform, including components such as AI Agent, AI Copilot, and AI Insights, a different approach will be required.

We recommend a phased, knowledge-centric go-live strategy to allow for knowledge resources to be gradually built up and tuned via AI.

Our team will work with you to create a custom timeline and strategy.

Step 2: Form your Live Chat rollout team

The first step to going live on your system is to identify the different people who will help with the rollout of your new software, as well as administer it on an ongoing basis.

The range of people involved could be quite different depending on the scale of your rollout.

	
If you have a smaller rollout with just a handful of agent seats, it's likely that you'll have two main types of people interacting with your system: • **Agents** – people who handle chats • **System Administrators** – people who manage the entire chat system, its look, feel, and behavior as well as history and reporting	If you have a larger rollout with lots of agent seats, it's likely that there will be many more types of people interacting with your system, for example: • **Agents** – people who handle chats • **Managers** – people who manage those agents • **System Administrators** – people who set up the behavior of the system • **Quality Assurance Team Members** – people who review chats • **Marketing Team Members** – people responsible for the branding of the live chat system • **Trainers** – people who will be training agents

There might be other roles, and some roles might overlap. Depending on the types of people involved with your rollout, it's likely that these different groups of people will have different responsibilities and permissions required within the Live Chat system. For each of the tasks within this guide, it'll be up to you to decide which people are responsible for which parts of your rollout and allocate different tasks to them.

Step 3: Make global functionality decisions

Set up agents
Any of your team members who will need to use the Comm100 platform will need to have a unique Comm100 account.

To learn more about how to set up agents, see this article.

Assign agent roles and permissions
Once you have set up agents, you'll need to decide which permissions each agent (or group of agents) should have. Roles and permissions dictate which agents can perform what actions in the Comm100

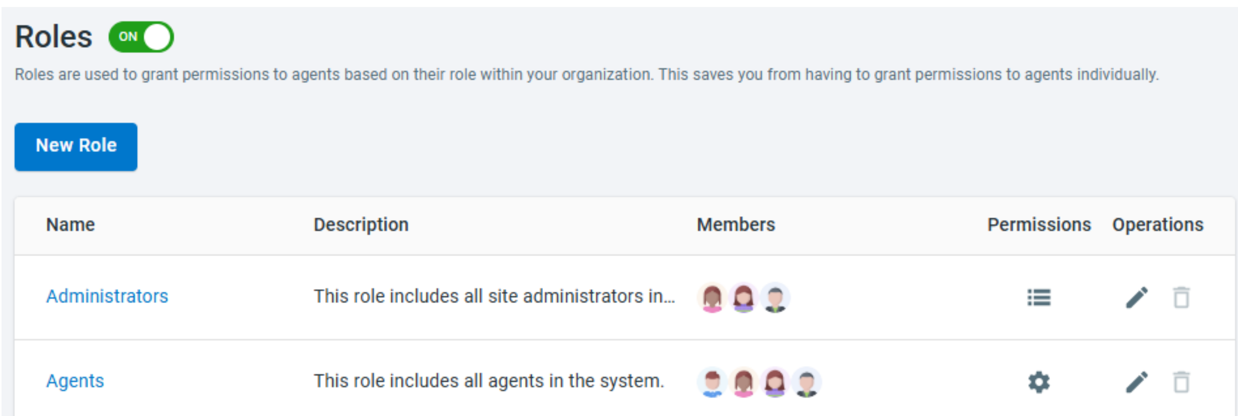
system. Roles allow you to assign different permission to a group of agents. By default, there are two types of different group roles within the platform with different default permissions associated with them – Administrators and Agents.

Administrators can access and amend everything within the Comm100 platform, including the platform's look, feel, and behavior. Agents have a more limited set of things they can do, which are more appropriate for basic operators.

You'll need to review the permissions assigned to agent and administrator groups to see if they're appropriate for your team.

You can also set up custom roles. Suppose you identified users in step 1 who need to perform functions a little above what regular agents can do but not quite to the level of full system administrators. In that case, you can set up a custom role for the user and assign permissions to the group.

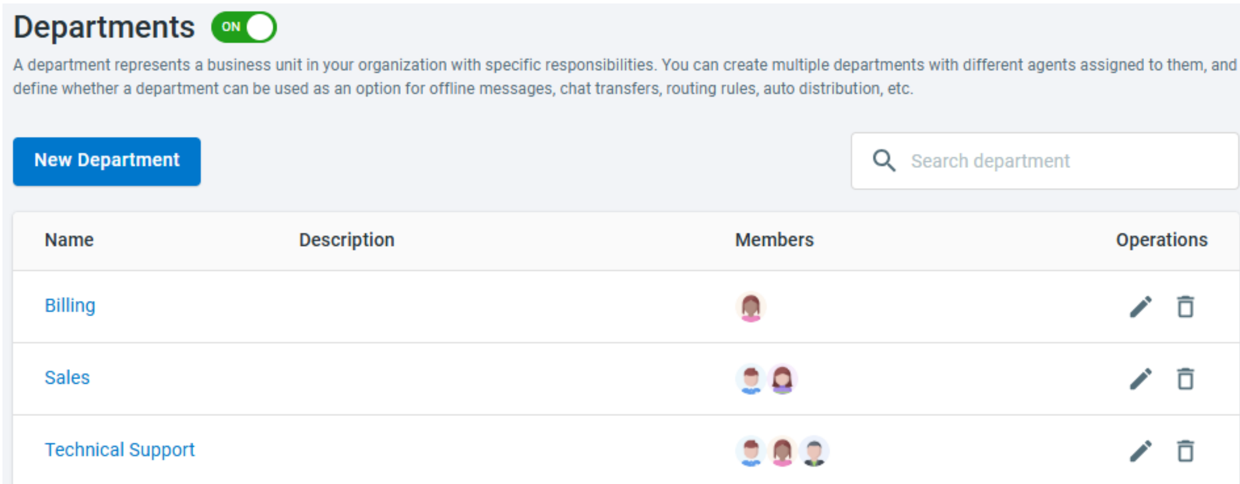
To learn more about roles and permissions, see this article.



Set up Departments

If you have several teams of agents that handle specific query types, geographies, products, or services, setting up departments is an effective way to handle chat routing and reporting for these separate teams.

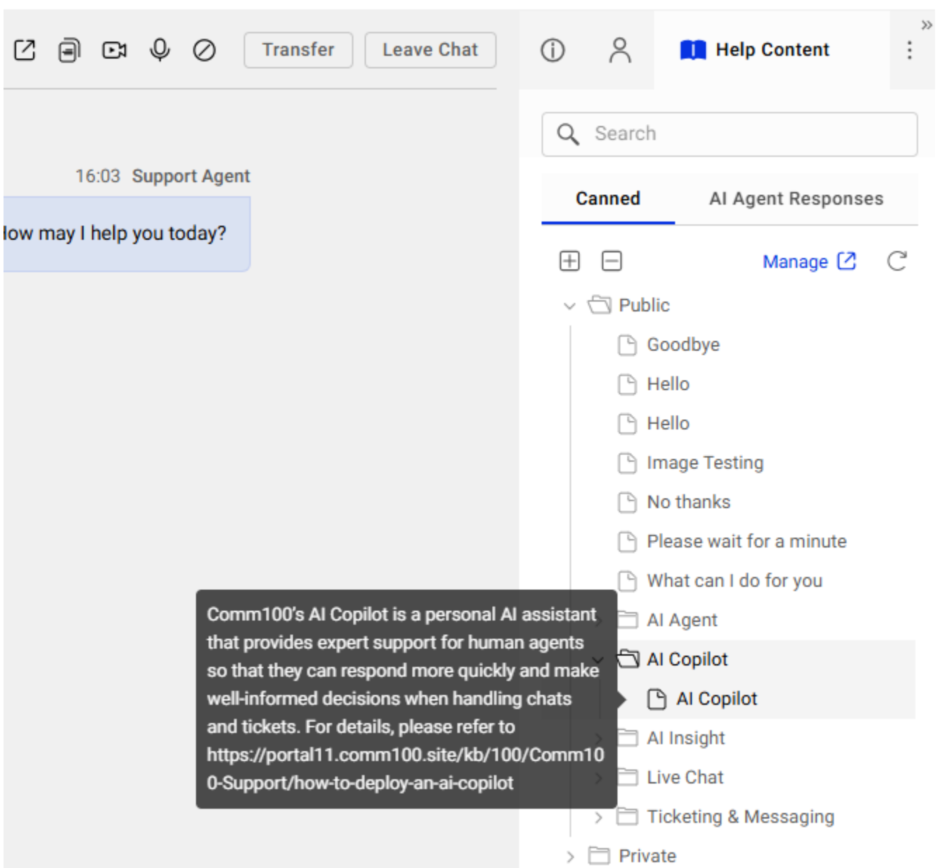
To learn more about setting up departments, see this article.



Create canned messages

Canned messages are pre-saved sections of text that agents can instantly add into their chats and messages. They're a great time saver for agents and valuable to ensure consistency in commonly used responses with customers.

To learn more about canned messages, see [this article](#).



Step 4: Make Live Chat functionality decisions

Here are the core decisions you'll need to make about how customers will interact with your Live Chat platform.

Decide what your chat system should look like

The look and feel of your chat system can be easily customized using our template library. The two main areas of the chat system that your customers will interact with are the chat button and chat window.

Chat button

The chat button will sit on your website or in your mobile app and act as the gateway to your chat system.

You're probably familiar with interacting with a chat button from your personal experience. We have a library of buttons you can use, or you can upload your own image as a chat button.

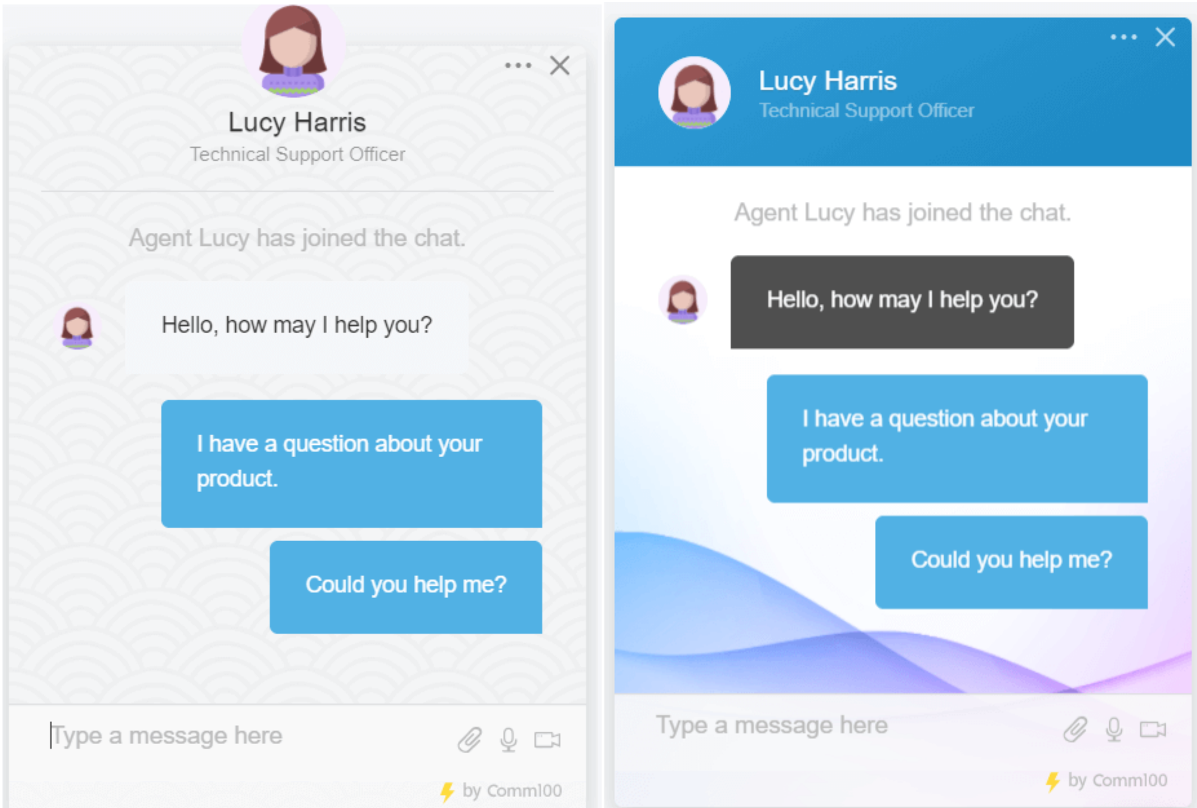
To learn more about chat buttons, see [this article.]

Chat window

Customers will interact with your agent team using the chat window. Like the chat button, this can be customized using our template library.

You can also use JavaScript or CSS code to create a chat look and feel unique to your brand.

To learn more about chat windows, see [this article].

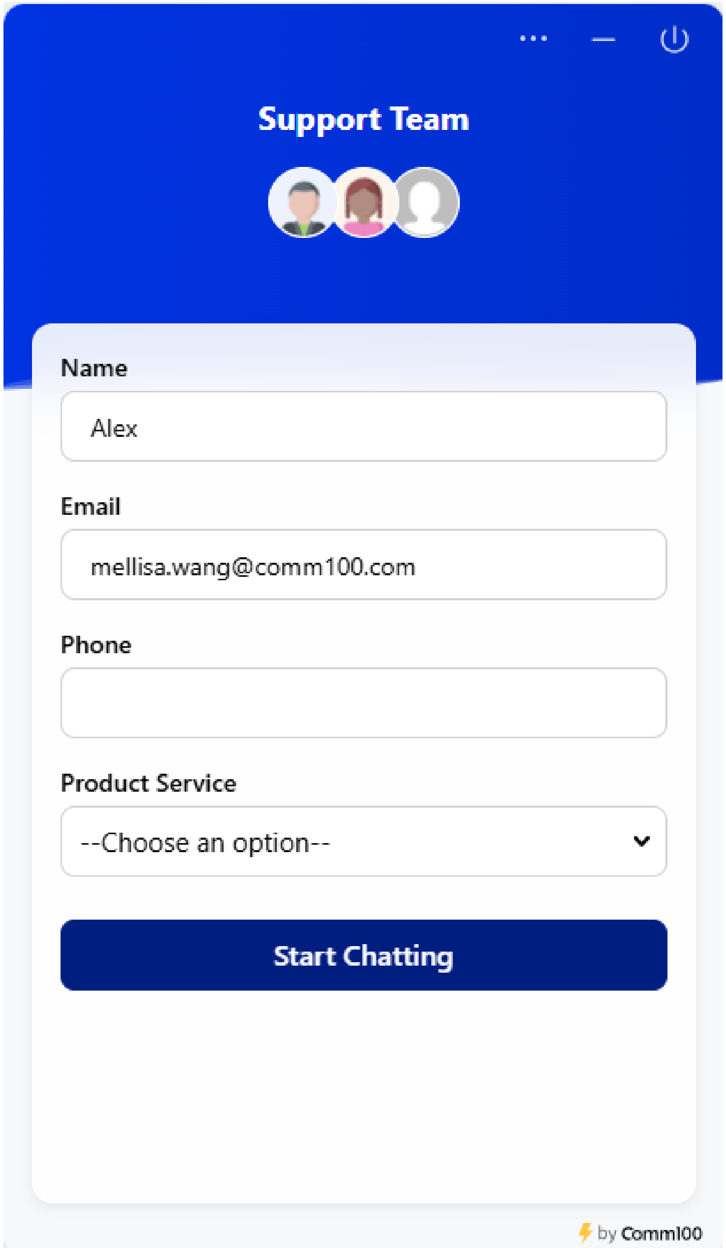


Decide whether to collect customer information via a pre-chat form before chats begin

Many of our customers choose to show a pre-chat form to the customer before connecting to an agent. The form can collect information like name and email address to save agents from having to ask for this information every time.

The chat system can also use customer information to aid routing the chat to the correct department or agent. Read more about this in the **Routing** section of this guide.

To learn more about the pre-chat form, see this article.

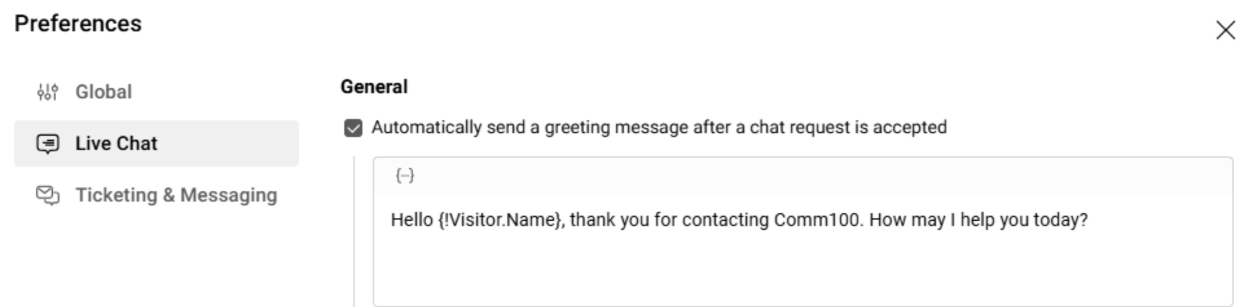


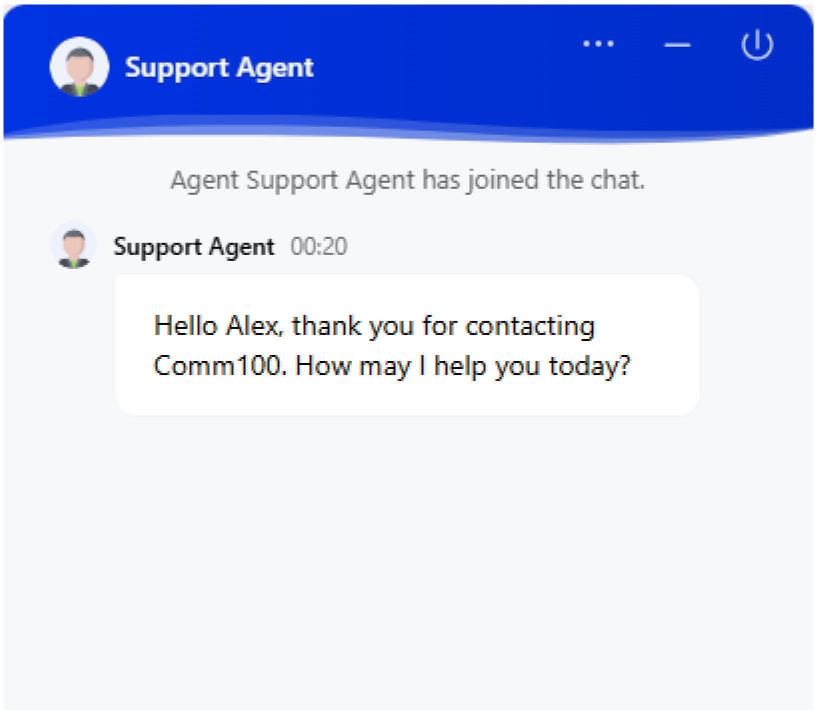
Decide how agents should greet customers

Each agent can set up an automated greeting to customers when a chat gets connected to them. Leaving this option switched off means that agents will need to type out a greeting every time a chat begins.

Greetings are configured per-agent within the Agent Console. If you wish all agents to greet customers in the same way, you'll need to create a greeting and then send this to them to save within their Agent Console.

You can even use information from the pre-chat form in the greeting to automatically greet the customer by name.





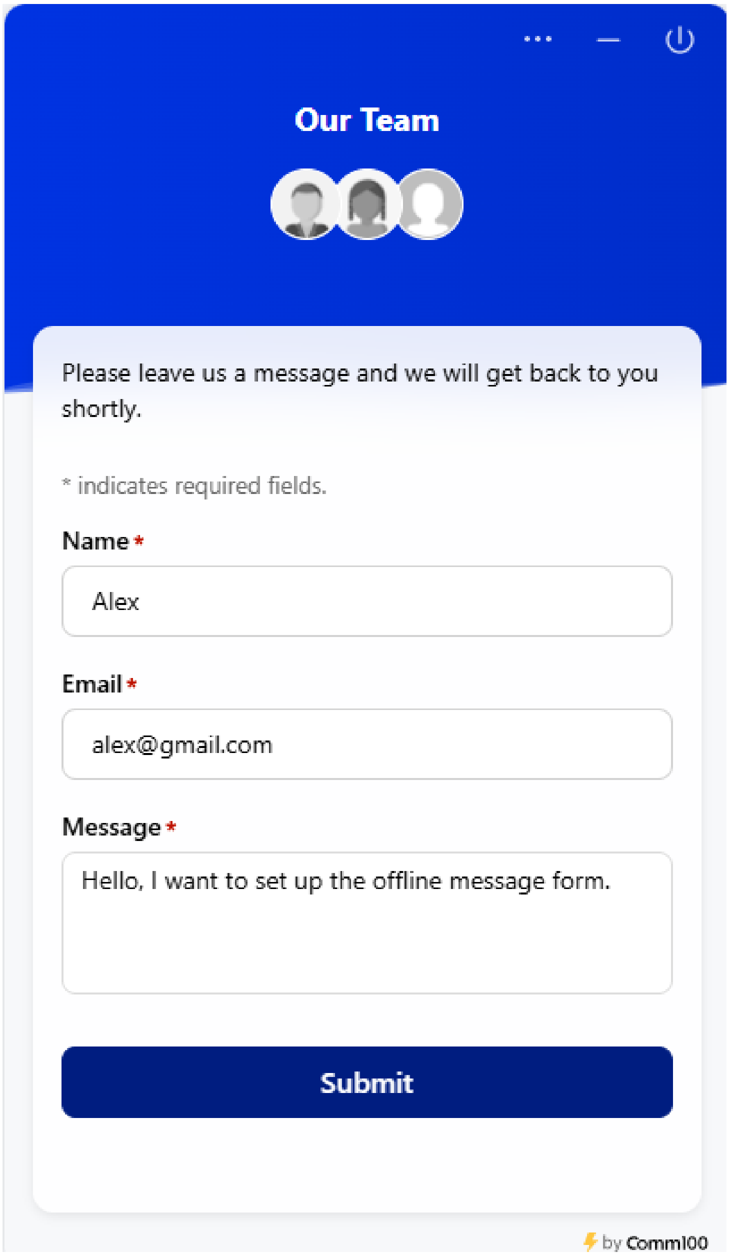
Decide whether to let customers leave messages when your agents are offline

Your chat system can use an Offline message form to collect customers' messages even when your agent team is not working. The details from the form can then be emailed to email addresses of your choice for follow-up.

To learn more about configuring offline messages, see this article.

Alternatively, you can choose for the offline message function to be hidden so that when your agent team is offline, the chat button is not visible.

To learn more about hiding the offline chat button, see this article.

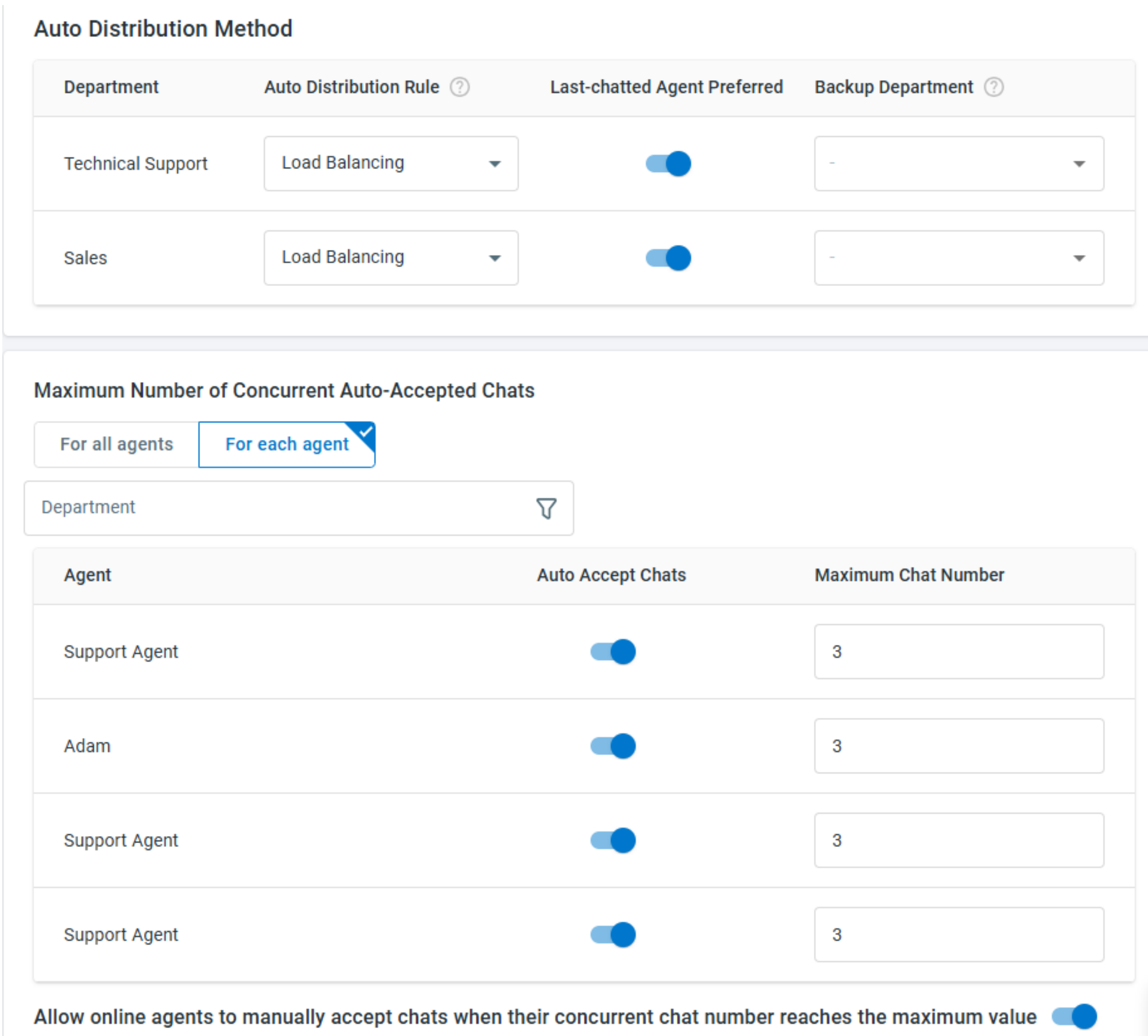


Decide how to configure queue options

The queuing function in Comm100 Live Chat is enabled once you switch on Auto Distribution and set a maximum chat number for each agent. Once that chat limit is hit, extra incoming chat requests will be sent to a queue.

You can also allow queued visitors to use the offline message form instead of waiting for an agent.

To learn more about queueing, see [this article].



Decide what customers should be able to do during chats
You can choose to enable or disable several features that customers can use during chats, including:

- Download chat transcripts
- Print chat transcripts
- Turn on/off sound notifications
- Email chat transcripts
- Switch to the offline message window while waiting to chat
- Send files
- Request audio/video chats

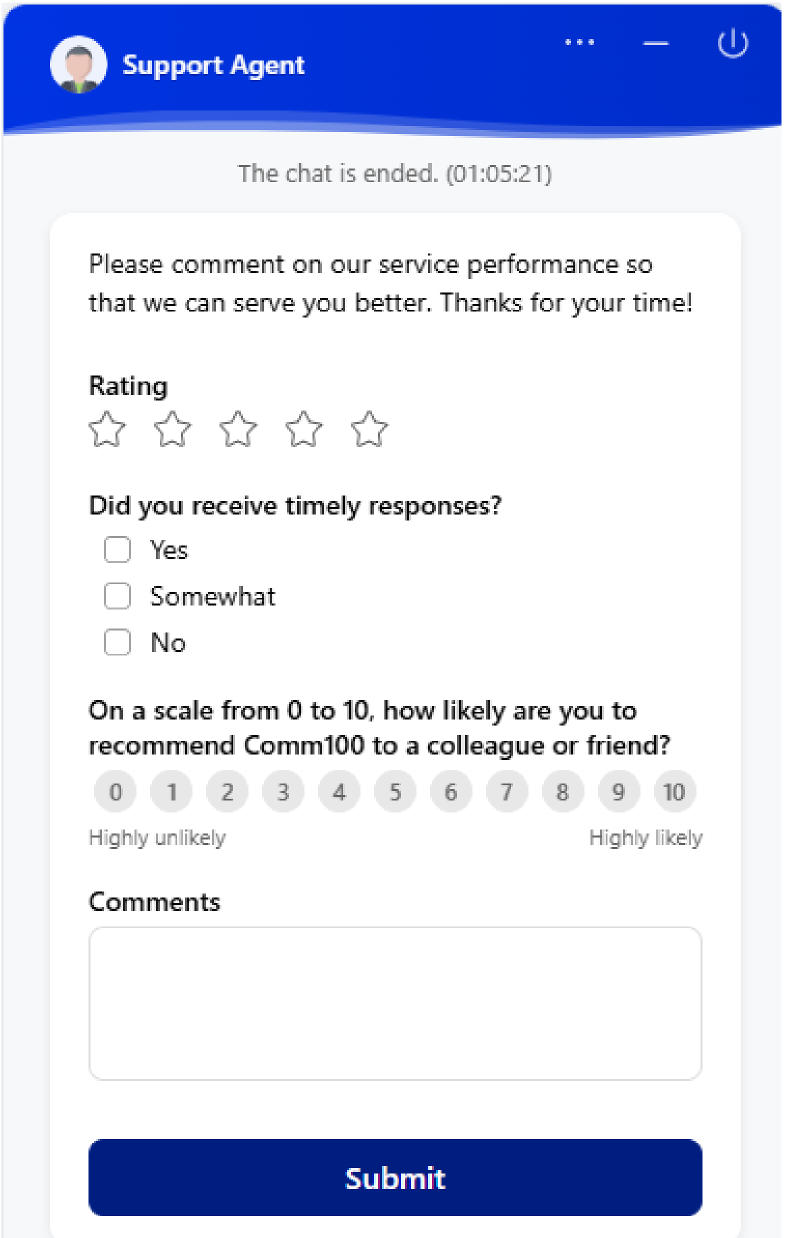
To learn more about customer chat options, see this article.

Decide whether to use a post-chat survey

Post-chat surveys are a great way to collect customer feedback about your chat service, providing you with helpful metrics and comments that improve the service you provide.

By default, our post-chat form contains a five-star rating and a comment box, but you can configure the survey to use the Net Promoter Score format or collect whatever data you like.

To learn more about post-chat surveys, see [this article].



Decide whether to run one or multiple instances of chat

If you have a single brand or website, you likely only need one instance of chat.

Suppose you're looking to run different instances of chat with different looks and behavior, embedding the different instances on different websites or website sections. In that case, you'll need to set up multiple campaigns.

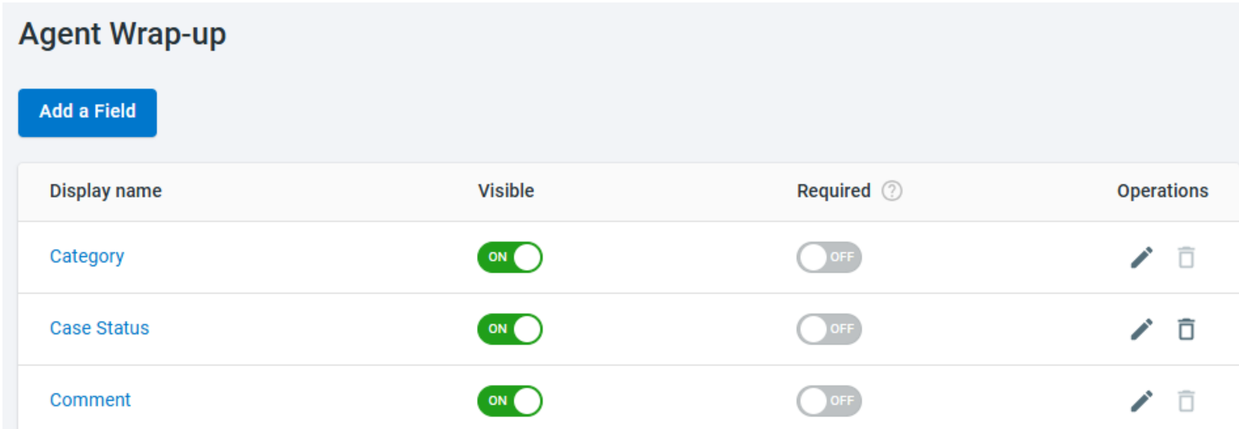
To learn more about multiple campaigns, see this article.

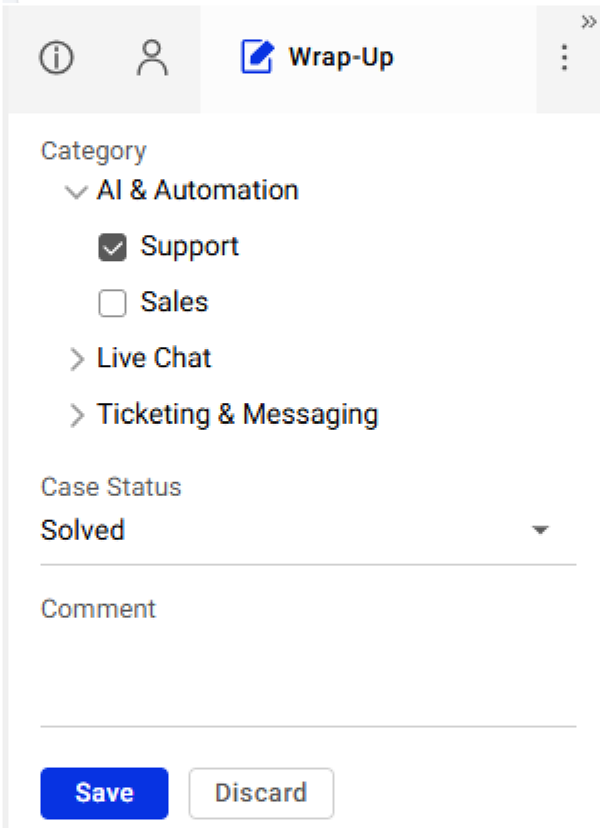
Decide whether agent wrap-up is needed

Wrap-up after each chat can be helpful for record-keeping or compliance purposes. You can choose to make the wrap-up fields in our system mandatory to complete, meaning an agent cannot close a chat with a customer without completing wrap-up.

Or you can leave the fields as optional, meaning agents can skip them out.

To learn more about agent wrap-up in this article.





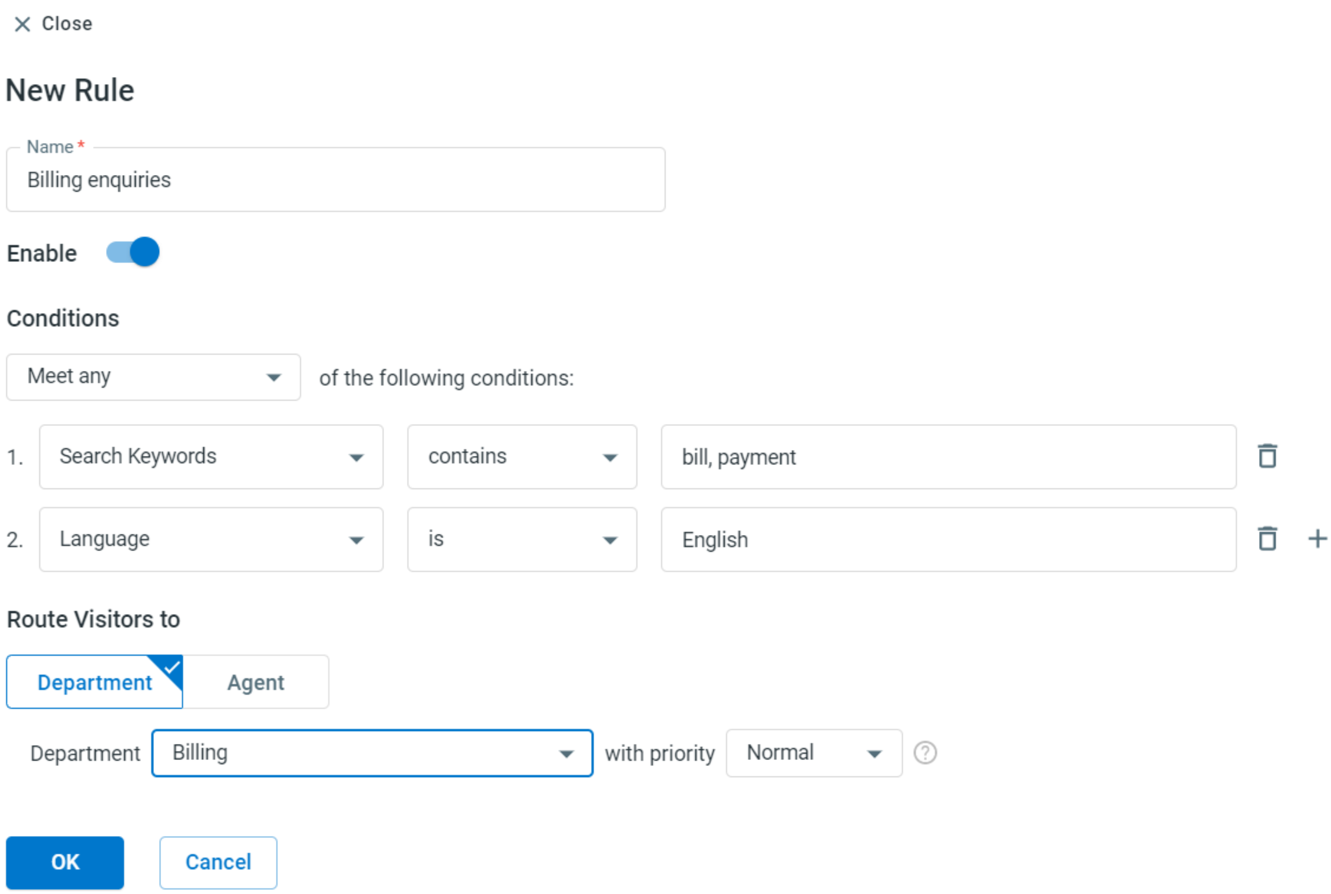
Get the right chats to the right agents

Here, you'll need to adjust settings to ensure that chats get allocated to the right agents.

Do I need to set up routing?

If you’ve needed to set up departments, routing is how you get chat requests to those departments. Alternatively, if you have a smaller agent team, you can use routing to send specific query types to specific agents.

To learn more about routing to departments or agents, see [this article.]()



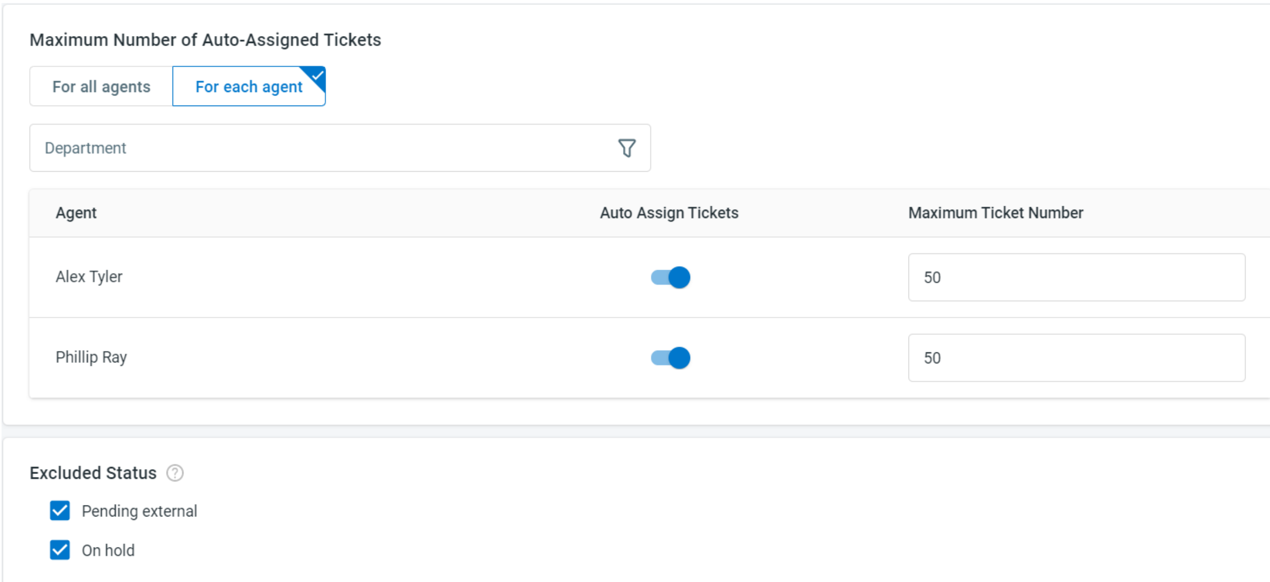
Do I want to distribute chats to agents automatically?

Our customers can automatically distribute chats to their agent team. This speeds up chats coming through to agents, meaning that the customer does not need to wait for an agent to pick up the chat manually.

Auto distribution means that chats get allocated directly to agents. If you leave auto distribution switched off, agents will need to pick up chats manually.

At the same time, you turn on auto distribution, you'll need to also configure a maximum chat limit for agents, so they don't get overwhelmed with automatically allocated chats if your chat system gets very busy. Once the chat cap is reached, any extra chats will go into a queue.

To learn more about accepting chats automatically, see [this article]().

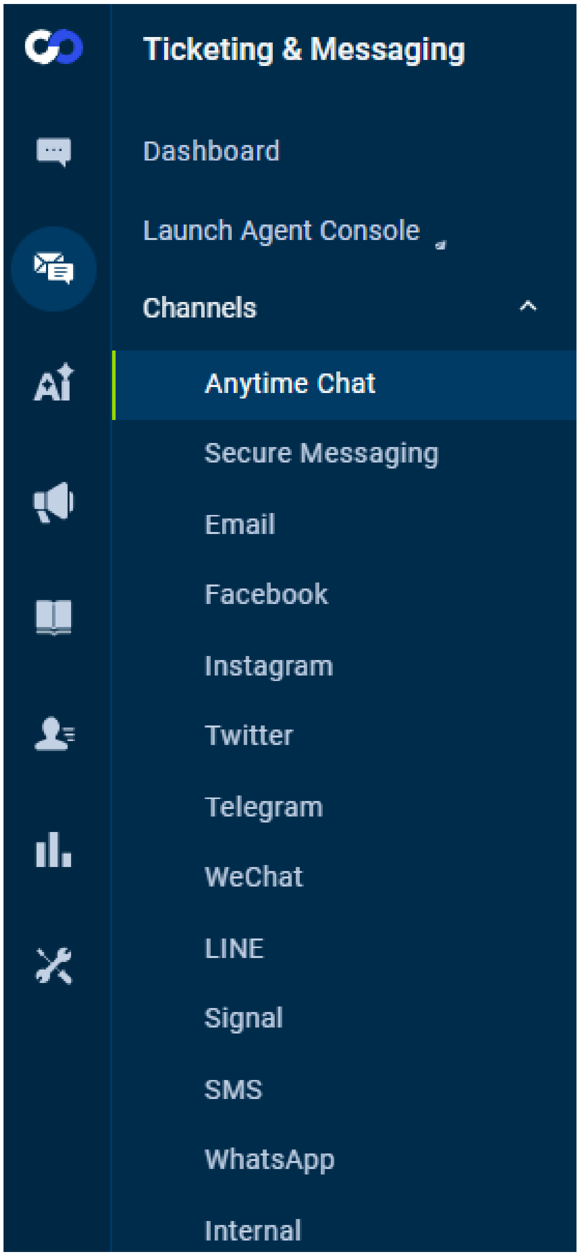


Step 5: Make Ticketing & Messaging Functionality Decisions

Decide which channels to integrate

You can choose to integrate any number of email accounts, Facebook, Twitter, WhatsApp, WeChat, SMS, and LINE.

To learn more about integrating different channels, see this article.

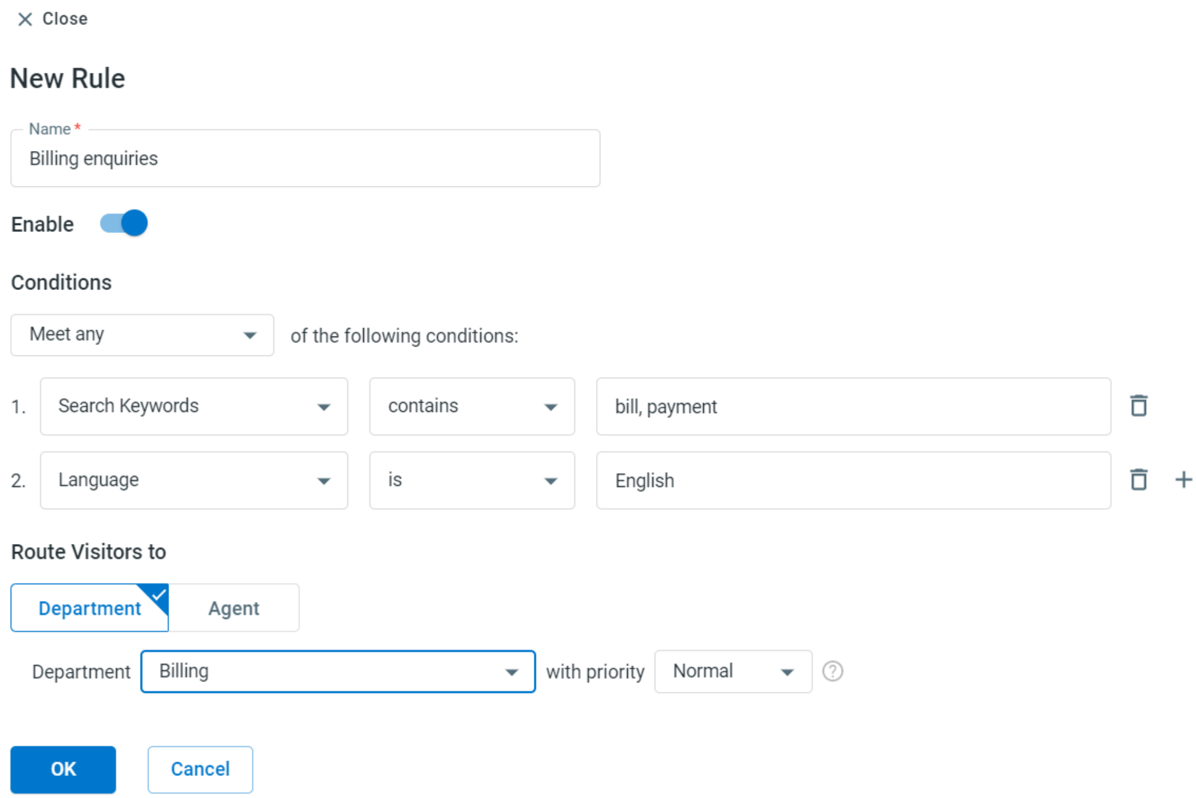


Get the right tickets sent to the right agents

Like live chat, you'll need to use routing and allocation to get tickets sent through to appropriate agents or departments.

Do I need to set up routing?

If you've set up departments, routing is how you get requests to those departments. Alternatively, if you have a smaller agent team, you can use routing to send specific query types to specific agents.



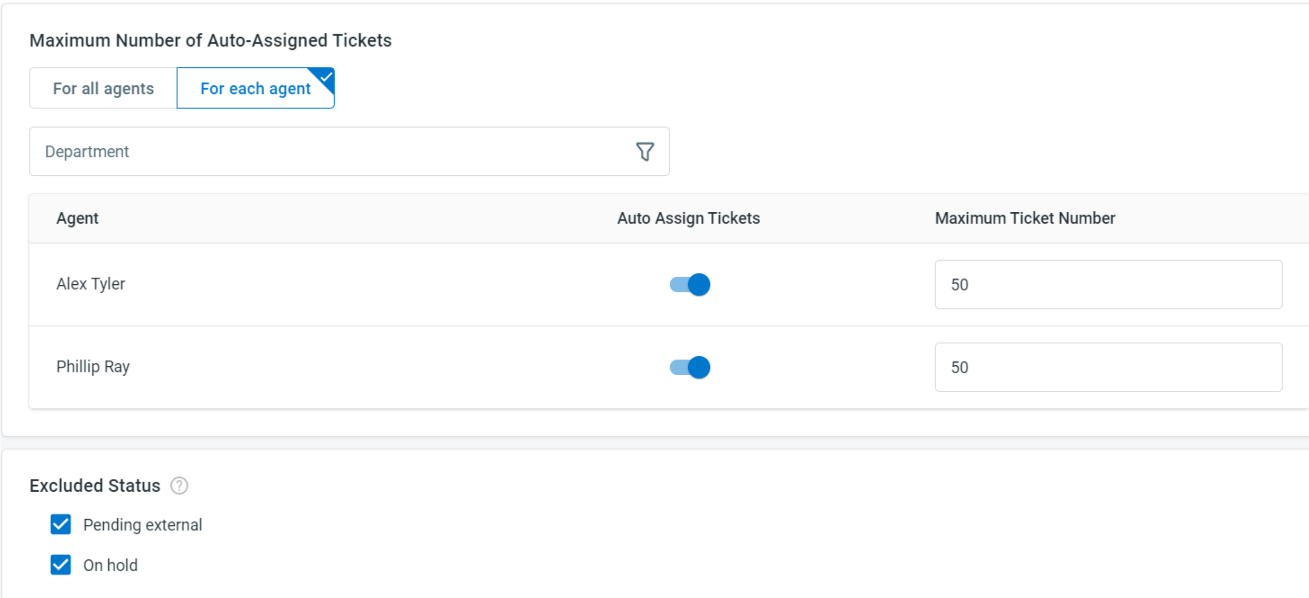
Do I want to distribute tickets automatically?

Auto Distribution in Ticketing & Messaging enables you to auto distribute tickets to agents to make sure the workload is distributed optimally. Once tickets are auto-distributed agents do not need to pick up tickets manually. You can define allocation rules of how tickets are assigned to agents and the maximum tickets an agent can accept automatically.

Auto distribution happens only on newly created tickets. If the same ticket needs to be allocated to another agent, then you can do it manually.

Tickets are auto distributed only to agents with Online status. However, agents can stop the flow of allocated tickets by changing their status to either Away or Offline.

Once tickets are distributed before the distribution rule is set up, they cannot be auto distributed again irrespective of the ticket's status. Only agents who have the permission can manually assign those tickets to the agent or re-assign them to another agent.



Set up Triggers

Triggers allow you to automate several actions within the Ticketing & Messaging system on an "if this, then that" basis.

When certain conditions are met, you can have the system change a ticket's attributes such as status, priority, or assignees.

You can also have the system send out automated messages to customers.

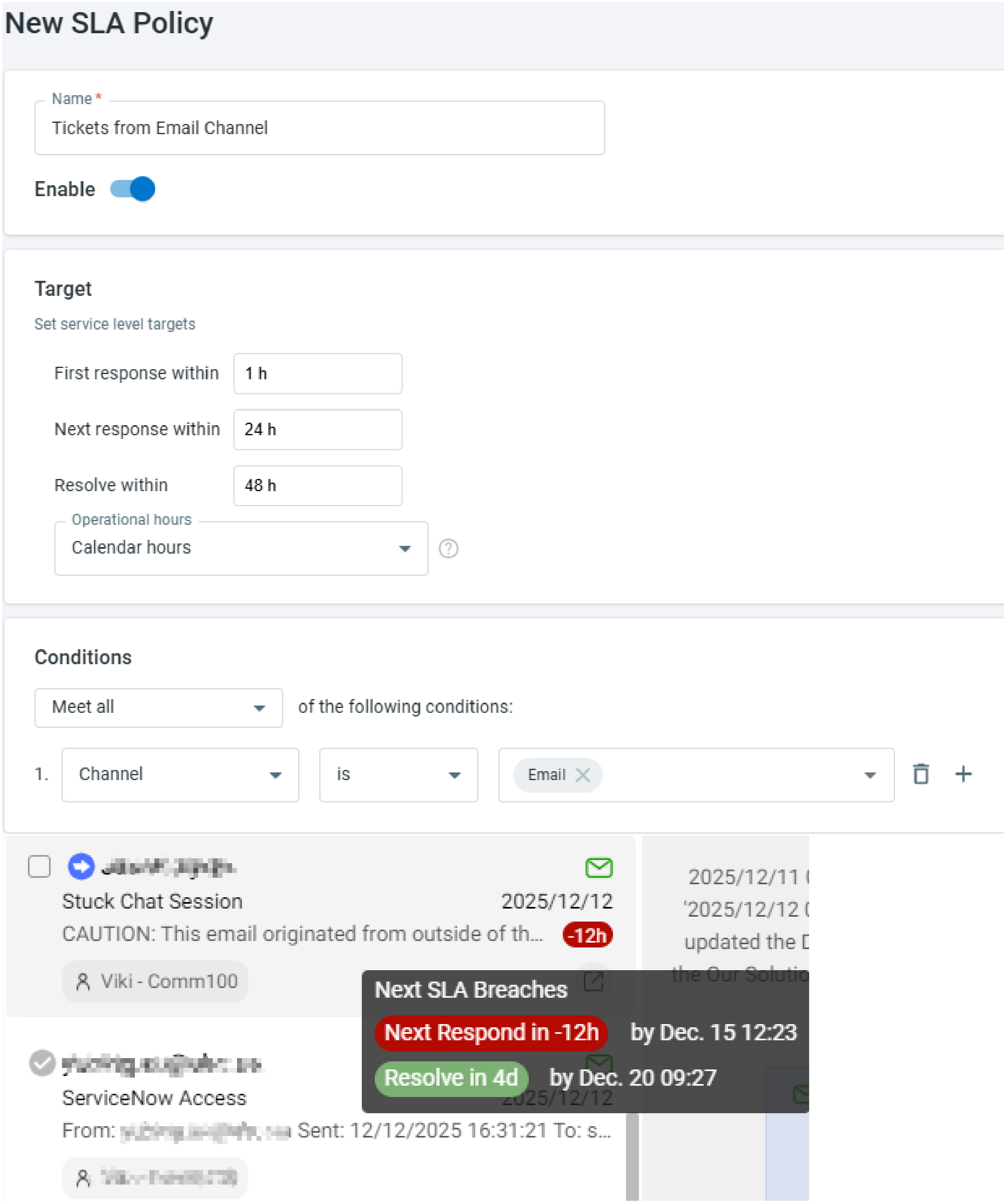
You can get these two different ways of automating system actions working together. For example, if a ticket is pending a customer response and has been for a week, you could trigger the ticket's status to change to closed and send an automated email to the customer letting them know their query has been closed.

To learn more about triggers, see this article.

Set up SLAs (Service Level Agreements)

If your company uses SLAs to manage tickets, you can configure these within the Ticketing & Messaging system. SLAs for different measures can then be seen within the Agent Console.

To learn more about SLAs, see this article.



Add in operating hours and holidays

You'll need to configure operating hours and holidays in your system to ensure that a number of features work properly.

If you use the SLA feature, having a correct view of your team's hours is essential to ensure the clock displays the correct time.

Operating hours and holidays also affect the ticket duration reflected in reports and be used to count days if they're used in trigger rules.

Step 6: Going Live

Book agent training

You'll need to prepare your team for the launch of your live chat system. A great way to do this is by booking in with our trainer team for specialized live chat agent training, delivered over webinars to your agent team. Contact your account manager to find out more.

Email user links and login details

You'll need to instruct your agent and manager teams on how to log into the Agent Console and issue them with their logins for the platform that you created in step 3.

Bringing Live Chat live

Install the live chat code on your web pages once you're ready to go live. Once this is done, your live chat system will be up and running!

To learn more about installing the live chat code, see this article.

Bringing Ticketing & Messaging live

Once you have integrated your email or social media accounts with the Comm100 Ticketing & Messaging system, your agents will be ready to start handling queries sent to those accounts through the Agent Console.

Step 7: Help Managers manage Live Chat and Ticketing & Messaging

Once your chat system is live, people managing your agent team will have specific tasks to perform to ensure that chats and tickets are being managed smoothly and appropriately by your agents.

Manager functions in the Agent Console

Typically, managers will be responsible for monitoring ongoing chats, and they can also join the chats if they need to. They'll also need to set agents away or kick them off the system if they leave themselves logged in accidentally.

To learn more about manager agent console functions, see this article.

Live Chat History

The History area within the Control Panel allows you to access chat transcripts. This area can be useful for managers to check chats for quality assurance purposes.

To learn more about history, see this article.

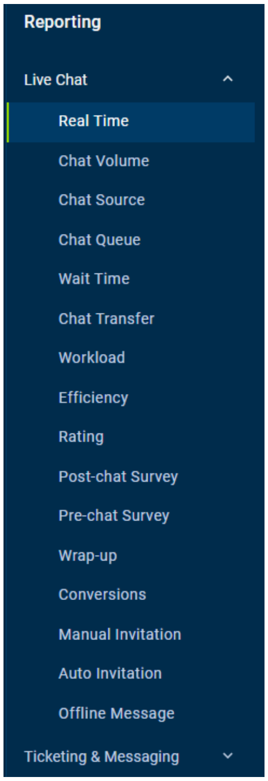
Ticketing & Messaging History

Ticketing & Messaging histories can be accessed through the Agent Console itself. Just search for keywords or Ticket IDs in the search box.

To learn more about how to access the history of each channel, see this article.

Reporting

The Comm100 reporting suite contains a wealth of reports that help managers and other agents monitor and measure a range of performance metrics, including volume, agent efficiency, post-chat ratings, and more.



To learn more about reporting, see this article.

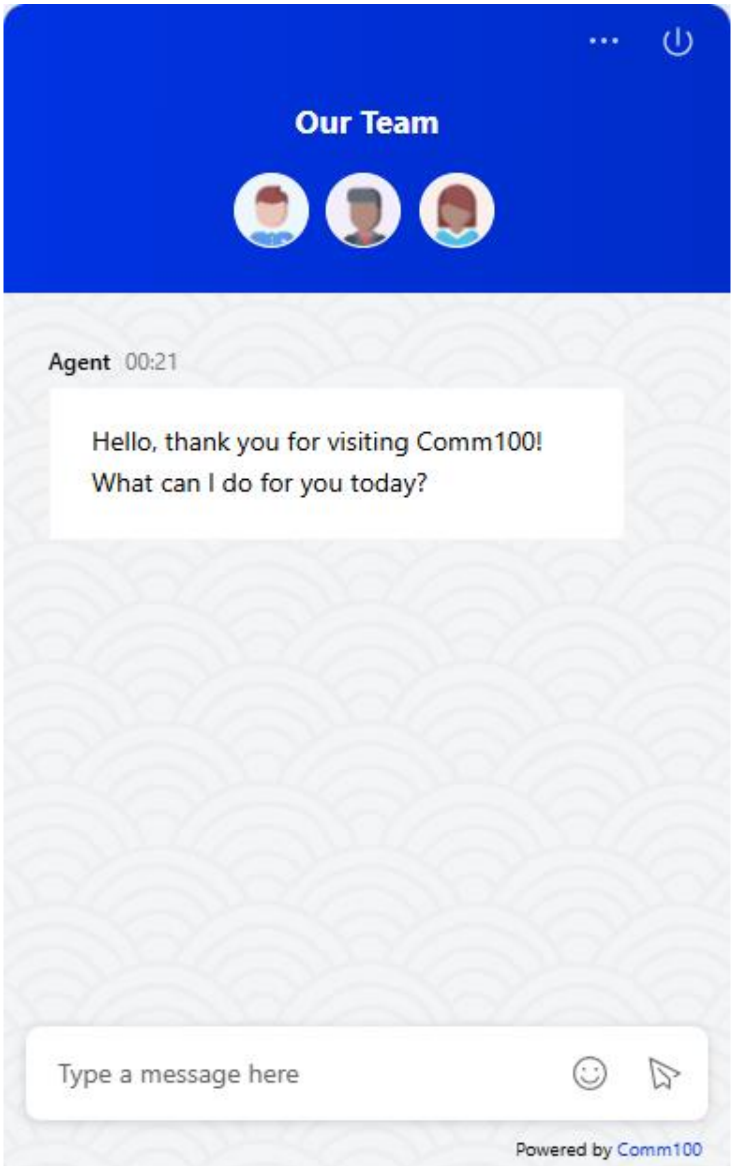
Sales-Specific Live Chat tips

If you'll be using live chat for e-commerce or customer acquisition, here are some tips to help you make the most out of your Comm100 deployment.

Proactive chat

By engaging your website visitors through proactive chats, you can potentially turn more visitors into customers. Invites to chat can be sent automatically based on certain criteria (for example, VIP status or shopping cart value) or manually by your agent team.

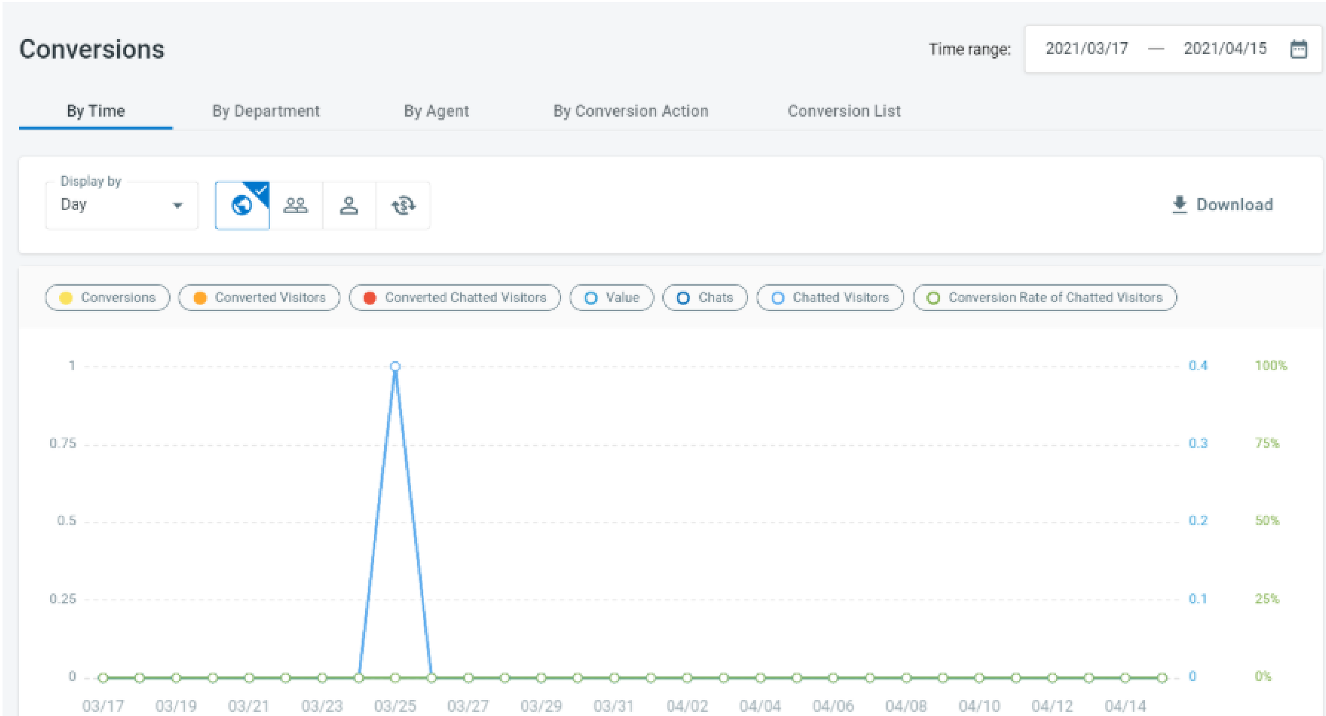
To learn more about proactive chats, see this article.



Conversions

Comm100's Live Chat Conversions feature links the live chat data with your onsite data, allowing you to view how chats drive your customers to convert on your site. This allows you to assess what types of chats are most useful in encouraging visitors to convert, as well as assessing exactly how much live chat contributes to the actions that sustain your business. You can determine what a conversion means based on your unique needs.

To learn more about conversions, see this article.



Security-specific Live Chat tips

If your organization is highly security-conscious, Comm100 has a wealth of features to allow you to implement stricter security controls on your live chat system.

To learn more about live chat security features and practices, see this white paper.

Integrations with other systems

The Comm100 platform comes with a range of built-in integrations to common contact centers, eCommerce, and customer communication systems. Check our information page to learn more about integrations.

Get in touch with us if you'd like to discuss getting these set up.

Comm100

Let's Chat!

Comm100 is a leading global provider of omnichannel customer experience solutions with a mission to make online service and support delivery more genuine, more personalized, and more productive through meaningful conversations. Let us show you how.

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