



Comm100

Getting Started Guide

Live Chat

Introduction

Getting started with Live Chat involves creating your team, configuring the features you want to use, customizing the look and feel of the Live Chat window so it looks good on your website, and then adding the Live Chat widget to your website once you are ready.

This article acquaints you with the features that Comm100 Live Chat provides and the steps you need to take to start using Comm100 Live Chat.

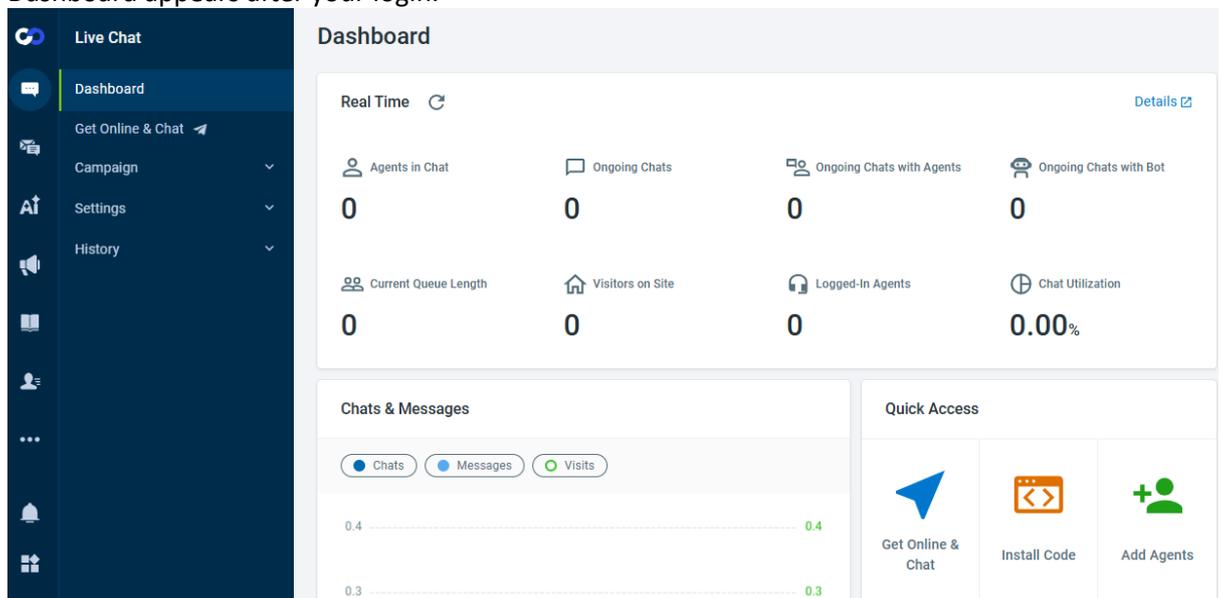
Note: Comm100 offers different plans for Live Chat. After you get an account, you can decide the plan suitable for your business and purchase the plan. To learn more about pricing and to compare the features of different plans, check [this page](#).

Explore the Control Panel

Understanding the features that Comm100 Live Chat offers begins with exploring the Control Panel. You can start exploring each feature and setting and tailor them to your business needs.

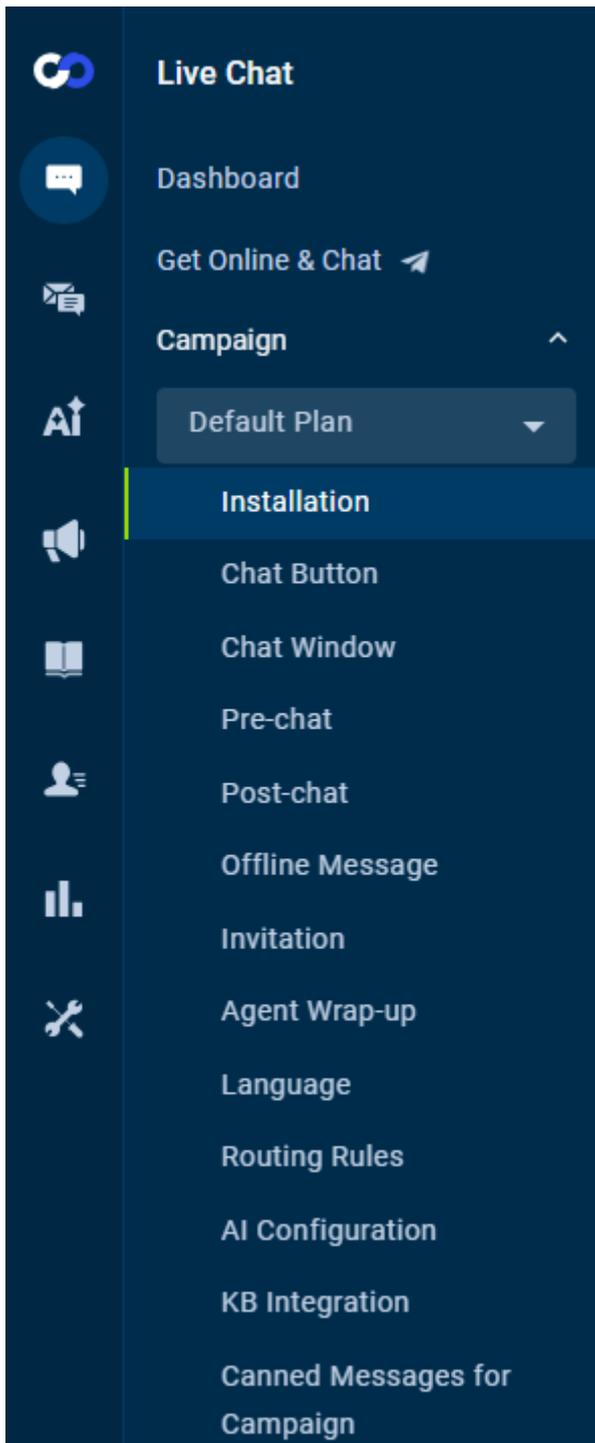
- **Log in to the Control Panel**

Once your account is ready, you can log in to the [Comm100 Control Panel](#). The Live Chat Dashboard appears after your login.



- **Set up your Live Chat Campaign**

You are now ready to browse through the Campaign menu and create a complete package of how the live chat button and window should look, what details you wish to collect before beginning a chat, details that you wish to save after the chat ends, customize a survey to collect feedback, set up the language that you wish to use, configure your routing rules, and so forth.



Read through the details of the Campaign menu options and learn to configure them:

- **Chat Button:** The Chat Button sits on your homepage and provides your visitors the option to chat with your agents and get responses to their queries. Comm100 offers three types of Chat Button – Adaptive, Image, and Text Link. You can make the Chat Button available to your visitors when your agents are online and hidden when they are not available.
To learn more about the different types of Chat Button, see [this article](#).
- **Chat Window:** The Chat Window is the interface that visitors use to communicate with your agents. You can customize the Chat Window to change the style and

logos. You can choose a company banner at the top of the Chat Window, so it fits neatly in with your website. You can configure the advanced settings to automatically receive chat transcripts with your visitors, automatically end chats if your visitors do not respond within a specific time, and so forth. The Chat Window can also be embedded in the webpage or set to pop up, and visitors can navigate to other sites while chatting.

To learn more about customizing the Chat Window, see [this article](#).

- **Pre-chat:** You can use the Pre-chat window to gather information from the visitor before a chat begins, for example, their name, email address, and so forth. This feature saves time and prevents agents from asking repetitive questions. You can also use the Pre-chat window for chat routing and allocation.
Custom fields can be created to collect any information you need with various input types available, from drop-down boxes to simple text fields. You can also set a greeting message to tell your visitor more about your company.
To learn more about enabling and customizing the Pre-chat window, see [this article](#).
- **Post-chat:** The Post-chat survey is a useful tool to see what your customers think about the overall experience they received from the agent they chatted with. You can customize the greeting message and create fields to collect ratings, comments, NPS, and so forth.
To learn more about customizing your Post-chat survey window, see [this article](#).
- **Offline Message:** Offline Message allows your visitors to leave a message if all your agents are offline. You can set any email address to deliver offline messages.
To learn more about Offline Message, see [this article](#).
- **Invitation:** Comm100's Invitation feature lets you send automated chat invites based on specific rules and conditions. For example, if a visitor is on your webpage for longer than 30 seconds, you can have an auto-invitation sent to them inviting them to chat. You can also customize what you want the [manual](#) or [automatic](#) message to look like.
- **Agent Wrap-up:** The Agent Wrap-up feature allows you to categorize and comment on every chat in the middle or at the end of a chat. Additionally, you can locate chats easily in the archives using wrap-up fields. Agent Wrap-up helps you manage your chats and retrieve chats from any category whenever you need to check them for review, training, and other purposes.
To learn more about setting Live Chat Wrap-up, see [this article](#).
- **Language:** The Language option lets you customize the language on the visitor side interface.
- **Routing Rules:** The Routing Rules feature allows you to efficiently route visitors to designated departments or agents based on visitor location, source, navigation history, and other system fields.
To learn more about Routing Rules, see [this article](#).
- **AI Configuration:** AI Agent is an automated virtual agent designed to answer your visitor's questions. It acts like your human Live Chat agents, helping them handle chat requests and balance their workload.
To learn more about creating your AI Agent, see [this article](#).
To learn more about creating your AI Copilot, see [this article](#).
To learn more about Spotlights, see [this article](#).
- **KB Integration:** The Comm100 Knowledge Base enables you to provide your visitors with a complete self-service support option and empowers agents to help visitors in a better way. Create your knowledge base with FAQs, user guides, how-to articles, integrate it with Live Chat and let your agents resolve visitor

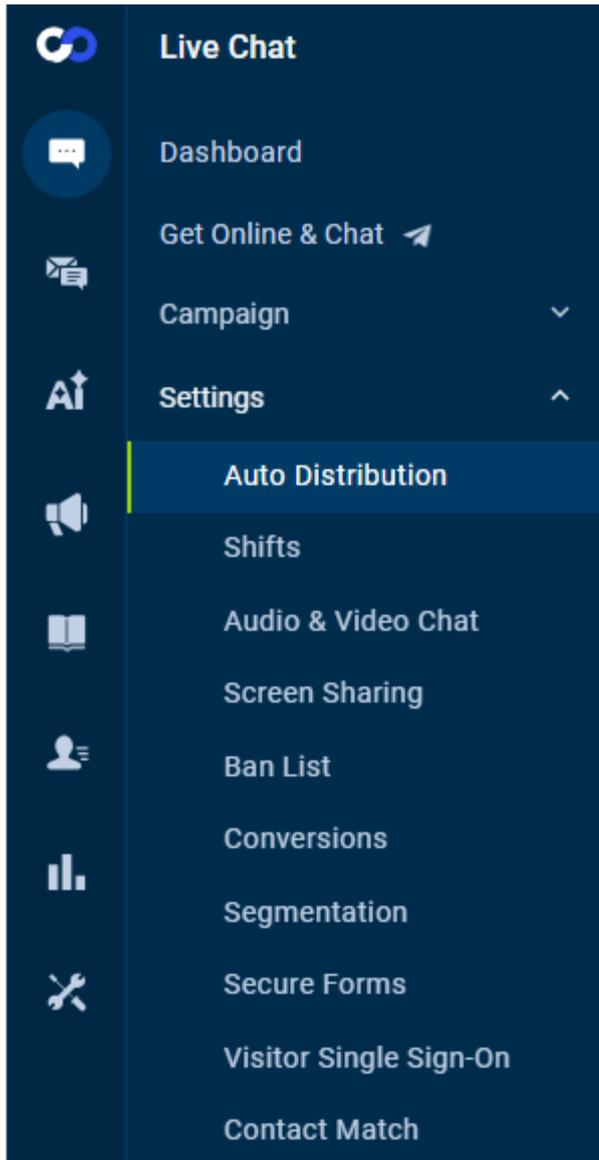
queries quickly.

To learn more on integrating and using the Knowledge Base, see [this article](#).

- **Canned Messages for Campaign:** These are pre-defined messages that can be sent instantly to visitors, saving agents time and preventing the same message from being typed out repetitively to different customers. Learn more on [how to create](#) and [use canned messages](#).

- **Personalize your Live Chat Settings**

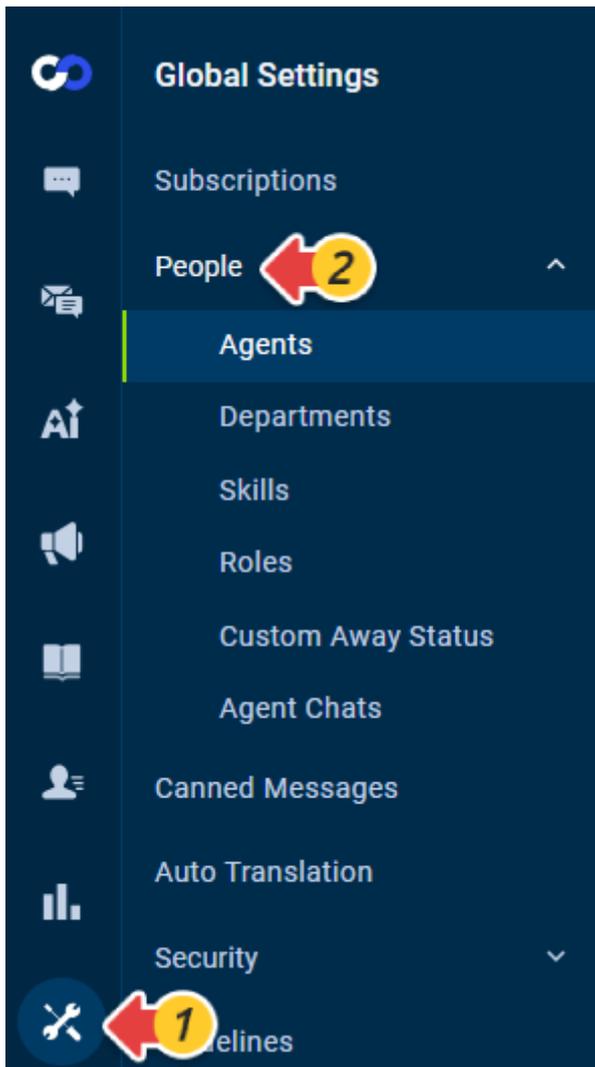
Move on to customize the Live Chat Settings menu options and use them to distribute chats, manage shifts, enable features like Audio and Video Chats, Screen Sharing, Ban List, and so forth.



Read through the details of the Settings menu options and learn to configure them:

- **Auto Distribution:** Visitors' chat requests can be automatically accepted by your online agents. Auto Distribution frees your agents from manually accepting chats, and your visitors don't need to wait once they initiate chat requests. To learn more about using Auto Distribution, see [this article](#).

- **Shifts:** You can use Shifts to manage Live Chat agent schedules, keep your teams organized and clear on when they are needed online to accept visitor chats. To learn more about using Shifts, see [this article](#).
 - **Auto Translation:** The built-in Google Translate integration helps you automatically translate chat messages to and from a visitor who speaks a different language. To learn more about enabling and using this setting, see [this article](#).
 - **Audio and Video Chat:** The Audio & Video Chat feature in Comm100 Live Chat enables your agents and your customers to talk over chat at any time. The solution offers more efficient and effective communication, speeds up resolution time, and improves customer experiences for higher satisfaction rates and increased sales. To learn more about Audio & Video Chat, see [this article](#).
 - **Co-browsing:** Co-browsing allows you to view and access your visitor's web browser in real-time, and you can request permission to control a visitor's web page. Co-browsing facilitates faster resolution in complex or technical scenarios. To learn more about Co-browsing, see [this article](#).
 - **Ban List:** You can use Ban List to block visitors from initiating chat requests. With Comm100 Live Chat, you can ban visitors by IP or by visitor ID. To learn more about blocking visitors, see [this article](#).
 - **Conversion:** The Conversion feature links Live Chat data with your onsite data, allowing you to view how many chats and the detail of chats, which drive your customers to convert. Conversion 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. To learn more about using this feature, see [this article](#).
 - **Segmentation:** Segmentation allows you to divide your visitors into different segments based on pre-defined rules. For example, you can create a visitor segment for VIP clients and have notifications sent to your VIP support team whenever a VIP client arrives on your website. You can set the color of each segment so that they can easily be identified from the Agent Console. To learn more about setting up Segmentation, see [this article](#).
 - **Visitor Single Sign-On:** The Visitor Single Sign-On feature lets you authenticate your visitor's account information before the chat starts. Once customers log in, your agents can view their account information in Comm100 Live Chat. This information helps the agents know the visitor they are chatting with and avoid asking the same standard questions, speeding up the resolution and improving customer satisfaction. To learn more about setting up the feature, see [this article](#).
 - **Contact Match:** Visitor-Contact Match is designed to automate the contact identification process. With Contact Match properly configured, the system automatically identifies and links a visitor to an existing contact, or creates a new one when necessary. To learn more about matching visitors with contacts, see [this article](#).
- **Add agents, set up your teams and departments**
You can start accepting chats and use the features and settings you just configured when your agents and teams are ready, and their roles and availability status are defined. You can use Comm100's Global Settings to add agents, create departments, and define their roles.



Read through the details of the People menu options in Global Settings and learn to add and configure them:

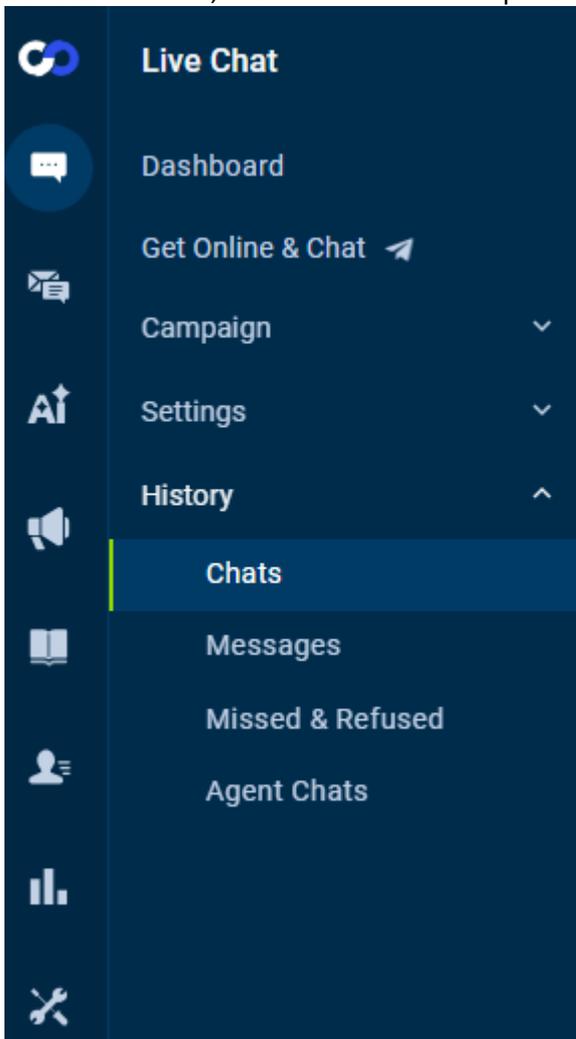
- **Agents:** Agents serve as the face of your organization for your visitors. Add agents to your Live Chat dashboard and define their department and roles clearly. To learn more about how to manage agents, see [this article](#).
- **Departments:** A Department represents a business unit in your organization with specific responsibilities. Departments help you assign incoming visitors to the most suitable agents. You can create multiple departments to group your agents according to their responsibilities. Through Departments, you can ensure chats and messages get forwarded to the correct teams. For example, you can create separate departments for support, billing, sales within your organization. To learn more about setting up Departments, see [this article](#).
- **Skills:** Skill-Based Routing (SBR) is a way to route chats based on agents' skills, so that your visitors can quickly get the targeted support that they need. Skills can be languages, IT skills, or product areas. By grouping agents into departments and defining agents' skills, you can route visitors to agents in a specified department with certain skills, so that visitors can get targeted support quickly. To learn more about setting up skill-based routing, see [this article](#).

- **Roles:** You can define the roles of any agent you add to your Live Chat dashboard. You can create roles like administrators, agents, and so forth. You can specify the permissions accessible to each of these roles.
 - **Custom Away Status:** Custom Away Statuses allow you to create and customize agent statuses for better reporting purposes. For example, it may be that the default "Busy" status isn't detailed enough for you to analyze agent states, and it may be that custom statuses of "Lunch," "Meetings," and "Comfort Break" give you greater visibility.
 - **Agent Chats:** Agent Chats display private conversations between agents, as well as any broadcast messages you send to them.
- **Set up your Site Security and Site Profile**
 Make use of Comm100's comprehensive set of security and account-management tools to help you protect customer data, maintain compliance, and manage how your team accesses and uses the system. These features help you control login behavior, safeguard sensitive information, track agent actions, and customize your site identity.

Read through the details of the Site Security features, and learn to add and configure them:

- **Restricted Words:** Create and manage restricted words that you do not want your agents and visitors during chat and ticket conversations. Once you enable this feature and add restricted words, the words are highlighted and the messages cannot be sent until the restricted words are removed.
- **Credit Card Masking:** Credit Card Masking allows you to mask credit card numbers sent by visitors during chat sessions. When credit card numbers are necessary, you can request the information from visitors through Secure Forms. These forms help you meet higher security standards and ensures that visitors' sensitive data is safe with you.
- **IP Allowlist:** Use the Ip Allowlist to control access to the Comm100 Control Panel and Agent Console by restricting logins to specific IPs.
- **Agent Single Sign-On:** Comm100 Agent Single Sign-On allows your agents to sign in to Comm100 using a third-party application. That way, your team can move between different tools and doesn't have to remember multiple sets of login credentials. Comm100 supports Agent SSO via SAML or JWT. To learn more about configuring Agent SSO, see [SAML](#) and [JWT](#).
- **Login History:** Login History offers you detailed records of login-related actions, helping you detect unusual access behavior, verify authentication outcomes, and ensure account integrity.
- **Audit Log:** You can use the Audit Log to review all agent activity. This feature records all agent activities so you can check all previous events that took place.
- **OAuth Client:** An OAuth Client is a token-based method of authentication which allows a third-party application to access Comm100 API using OAuth protocol. To learn more about OAuth, see [this article](#).
- **Secure Forms:** Secure Forms allow you to collect data securely. During a Live Chat interaction, your agents may need to collect sensitive visitor information that your visitors may not want you to save in your databases. In such cases, you can create and use secure forms as the data collected through these forms are not stored in chat transcripts.

- **Password Policy:** Create policies around password protection, defining the options like the number of characters, type and mix of characters to be used, password expiry time, failed login attempts with an incorrect password, and so forth.
 - **Two-Factor Authentication:** Two-Factor Authentication (2FA) is a security process in which two different authentication factors must be provided to verify your identity.
To learn more about Two-Factor Authentication, see [this article](#).
 - **Site Profile:** Use the Site Profile feature to create your site profile by defining details like site ID, language, company/organization name, website, phone number, mailing address, time zone, company size, country, and so forth.
- **Learn using the Live Chat History**
Once you start accepting chats, you need to check your chat volume, chat duration, missed or refused chats, offline messages, details of the department and agent that handled the chat, check the chat transcript to maintain quality, and so forth.



To learn more about using the History feature, see [this article](#).

Explore the Agent Console

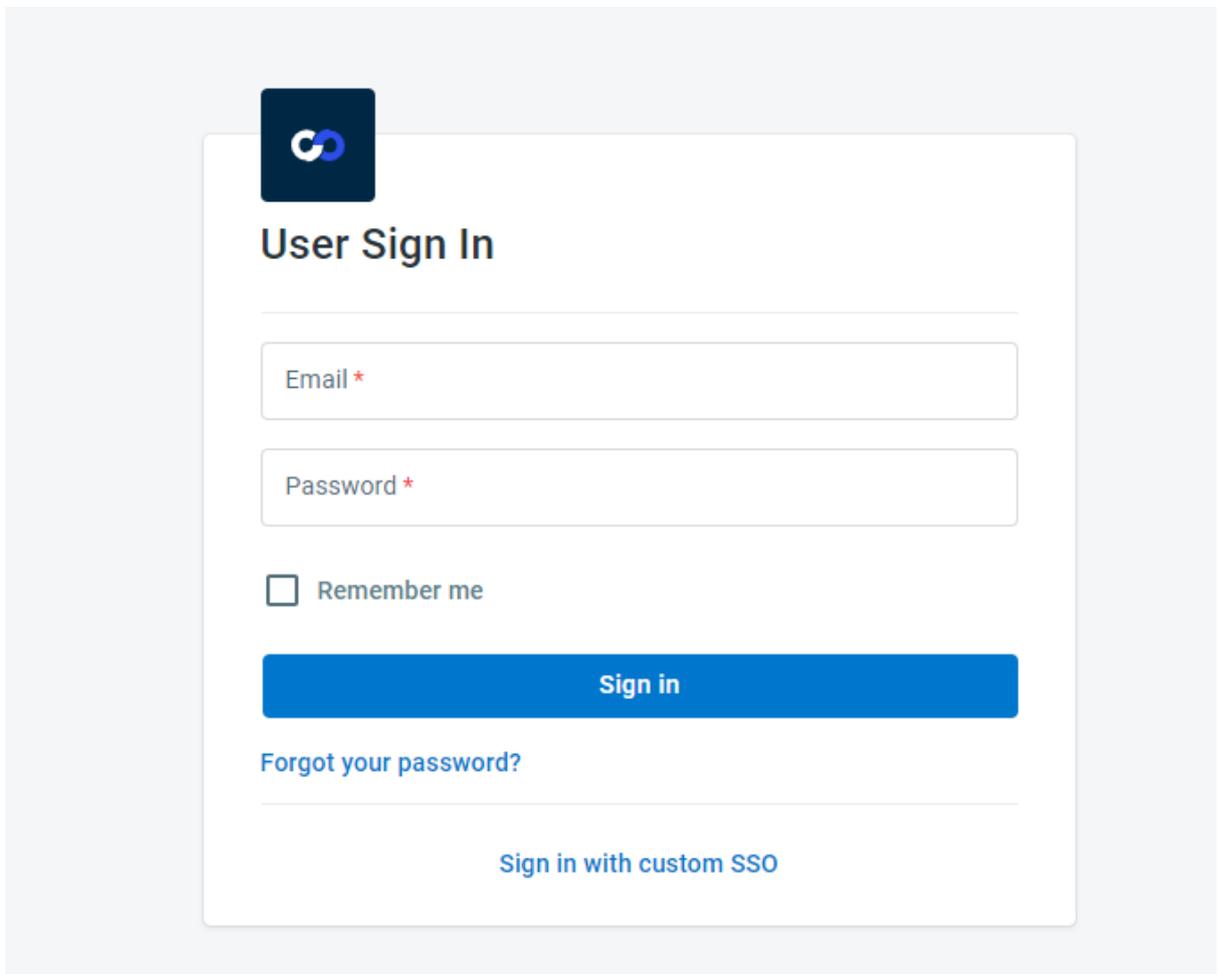
You have the choice to use the Agent Console either from your PC's browser or by installing our desktop app. You can also access Agent Console on your mobile phone by installing the Comm100 Live Chat app.

Use these links to download the desktop app:

[Download for Windows](#)

[Download for Mac](#)

- **Log in to Agent Console**
After downloading and installing the desktop app, launch it and log in to the Agent Console. Once logged in, the Agent Console home page will appear.



The screenshot shows a 'User Sign In' form. At the top left is a dark blue square icon with a white 'C' and a blue circle. Below the icon is the title 'User Sign In'. The form contains two input fields: 'Email *' and 'Password *'. Below these fields is a checkbox labeled 'Remember me'. A prominent blue button labeled 'Sign in' is positioned below the checkbox. Underneath the button is a link that says 'Forgot your password?'. At the bottom of the form is another link that says 'Sign in with custom SSO'.

- **Configure Preferences**
Customize your Agent Console experience through the Preferences menu. You can configure settings such as auto logout, auto away, theme, language, greeting messages,

shortcuts, notifications, visitor columns, and more.

Preferences



Global

- Live Chat
- Ticketing & Messaging

General

- Ask for status preferences every time you log in [?]
- Start Agent Console upon startup of your machine
- Automatically log out after minutes of no mouse or keyboard input.
- Automatically switch to Away status after minutes of no mouse or keyboard input. [?]
- What action to take when closing Agent Console:

Theme

Default Dark

Language

Text Direction: [?]

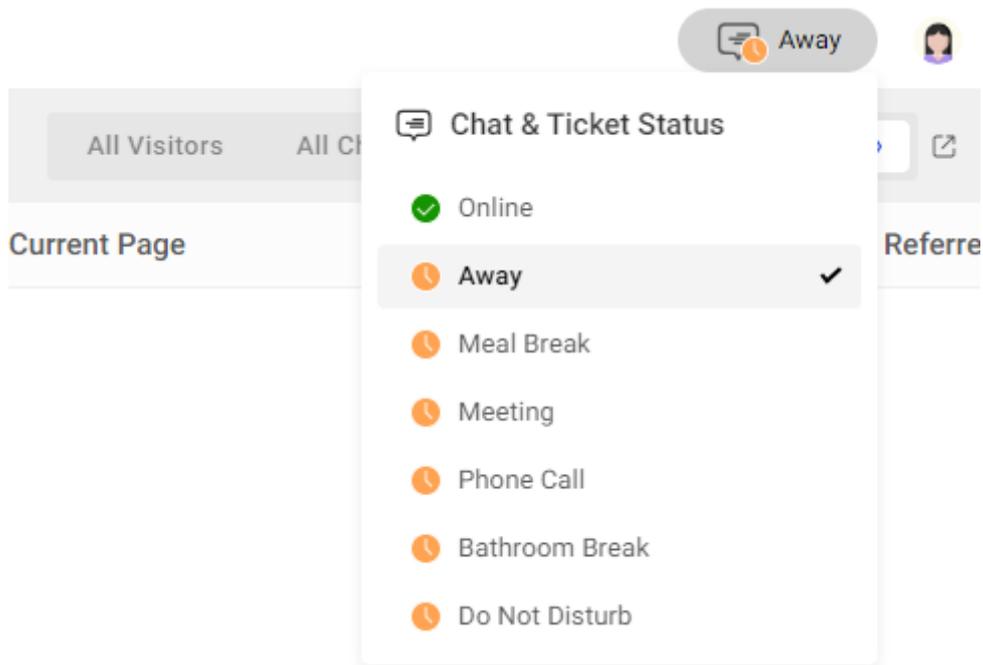
Auto-translate to: [?]

Spell Check:

- **Global:** Use the Global tab to set auto logout, auto away, theme, and language. Language settings include text direction, auto-translation, and spell check options.
- **Live Chat**
 - Greeting Message: Automatically sends a predefined greeting after a chat request is accepted.
 - Auto Message: Sends automated messages when either the agent or visitor does not respond within the predefined time.
 - Auto Close Chat Window: Set your preference for automatically closing the chat window after a chat ends.
 - Auto Monitor: Automatically monitor ongoing and incoming chats based on your selected settings.
 - Shortcuts: You can create keyboard shortcuts for sending messages, switching to the next chat or next response, and searching for canned messages.
 - Notification: Use the Notification tab to set notifications for a new visitor, incoming chat, chat in queues, new response, and so forth.
 - Visitor Columns: Select which visitor information columns to display or hide in the Visitors tab, and adjust their display order.
- **Set your status to Online and start accepting chats**

You can choose the status you want to display to visitors by clicking the status icon in the top-right corner of the Agent Console home page. Select Online to start receiving chat

requests.



Install the Live Chat Code and Go Live

Once you are done exploring the Control Panel, setting up your Campaign, and configuring your Live Chat Settings, you are ready to make Live Chat available to your visitors.

To make Live Chat available to your visitors, you must copy the installation code and paste it onto your website.

To learn more about installing the Live Chat on your website, see [this article](#).

Comm100's support team is available 24 hours a day, seven days a week. If you need any additional help to set up the Live Chat and go live, you can [chat with us](#).

Learn Using the Live Chat Reports from the Control Panel

Comm100's Reporting feature provides you the data and metrics that matter most to your chat quality, agent performance, visitor satisfaction, Chatbot performance so that you can make informed decisions for improvement.

To learn more about the Live Chat reporting menu option, see the Live Chat Reports section in [this article](#).

Learn Using the Apps and Integrations

Comm100 Live Chat offers a wide range of integrations with key systems, including CRM and shopping cart platforms, and a highly flexible API that lets you transfer data to and from the other

relevant platforms in your ecosystem. Choose the Apps and Integrations that suit your business need and integrate them with your Live Chat.

- **Configure RESTful API**
Comm100's RESTful API enables you to integrate your applications with Comm100 Live Chat to allow both systems to exchange information. To learn more about APIs, click [here](#) for a quick introduction.
- **Integrate Third-Party Applications**
Comm100 Live Chat can also be integrated with a host of different applications such as Salesforce, Dynamics 365, Cisco, Shopify, Deltapath, Calendly, Zapier, Google Analytics, Zendesk, and GoToMeeting.
To learn more about applications that can integrate with Live Chat, click [here](#).
- **Configure Webhooks**
Webhooks allow you to receive notifications from Comm100 when a certain event happens. You can register an "http://" or "https://" URL where event data can be stored in JSON format.
To learn how Webhooks are configured within Live Chat, see [this article](#).
- **Configure Custom Variables**
Custom Variables allow you to read visitor information from your website and pass it to your live chat system.
To learn more about custom variables and how they are set up, see [this article](#).



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.

[Learn More](#)

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