Brand Management Live Chat

Version 1.1

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Live Chat overview

Live chat enables businesses to engage in real-time conversations with customers and prospects directly from their website. Unlike traditional methods such as phone calls or emails, live chat provides customers with a convenient way to interact with the business through an online channel.

Logging in

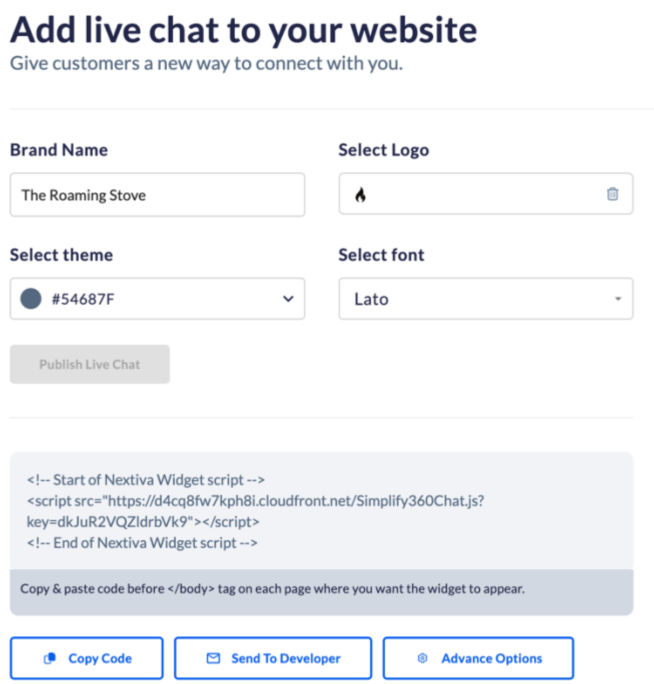
Visit nextiva.com, and click **Login** at the top. Select **Sign in to NextivaCX**. Enter your Nextiva username and password and click **Sign In**. If you forgot your username or password, click here.

Setting up live chat

Navigate to the Onboarding Menu and select **Live Chat**. Select **Add Live Chat** and enter all the required settings.

a. **Brand Name:** Enter the name, such as your business, to appear in the Live Chat header.
b. **Select Logo:** Upload your brand logo to be displayed on the Live Chat header.
c. **Select theme:** The primary color of the chat window.
d. **Select font:** The font used in the Live Chat.

When finished, click **Publish Live Chat**.



Adding live chat to your website

Once the Live Chat settings have been configured, you can insert the chat on your website. Simply copy and paste the code onto each page where you want the Live Chat to appear.

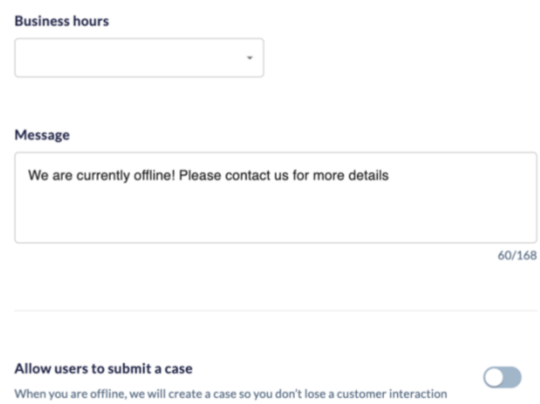
> **NOTE:** Inserting the code into the website differs depending on the website being used. For example, WordPress has a Nextiva plug-in.

Copy Code: Ensure the code is copied accurately to avoid errors.

Send to Developer: Send the code directly to your developer so they can upload the code. When selecting Send to Developer, a popup will appear requesting the email of the person to whom the code should be sent.

Advanced Options: Additional Live Chat settings that can be implemented into Live Chat.

- **General**: Manage your brand name and logo.
- **Appearance**: Customize the chat window to match your brand. Choose left or right hanging placements, theme colors, button sizes, and fonts.
- **Getting Started**: Enter a message to display in the chat widget. Example: "Hello, how can we help you today?"
- **Pre-Chat Questionnaire**: This can be used to collect information before Live Chat begins. You can set up questions to capture lead contact info or to identify the customer in advance of the conversation.
- **Post Chat Survey**: Embed the CSAT or NPS survey to populate once the chat has been completed.
- **Offline**: Live Chat is available 24/7 unless business hours are enabled.
- **Preferred Channels**: Choose your preferred conversation channel beyond just the website chat. This could include messaging apps, SMS, and more.
- **Installation**: Instructions on how to add live chat to your website.
- **Settings**: Enable/disable user session history, notifications, chat transcripts, attachment options, and more.
- **ChatBot**: Enable the Chatbot into Live Chat.



Setting up after hours

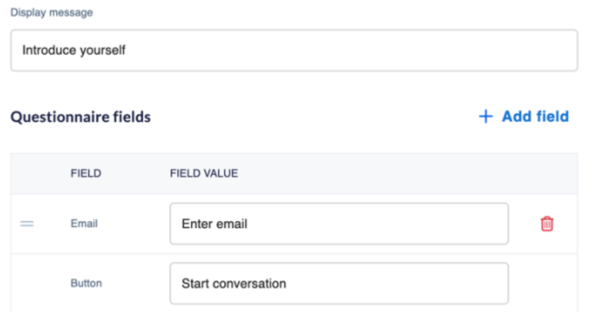
Set up after hours to deactivate the Live Chat when a live agent is unavailable. When activated, the chat feature will be disabled, but customer data can still be captured for lead generation.

To activate After Hours, navigate to the Onboarding Tab and select **Live Chat**. Select the live chat to add after hours and click **Advanced Settings**. Click **Offline** and enable Business Hours.

Select **Business Hours** from the drop-down menu and choose the schedule to apply to Live Chat. If business hours have not been set up, select **Manage Business Hours**.

Enter the message you would like to display to the customer. Choose if you would like the customer to submit a case.

Review how the message will be displayed in the preview on the right side of the screen. Click **Save**.



Creating a pre-chat questionnaire

A pre-chat questionnaire collects customer information, serving as a valuable tool for capturing customer data for potential leads.

Navigate to the Onboarding Tab and select **Live Chat**. Select the live chat to add a pre-chat questionnaire and click **Advanced Settings**.

Click **Pre-Chat Questionnaire** and enable Pre-Chat Questionnaire.

The survey defaults to capturing the email and entering a button to begin the chat.

To add additional fields (name, phone number), select **Add Field**. Click **Save**.

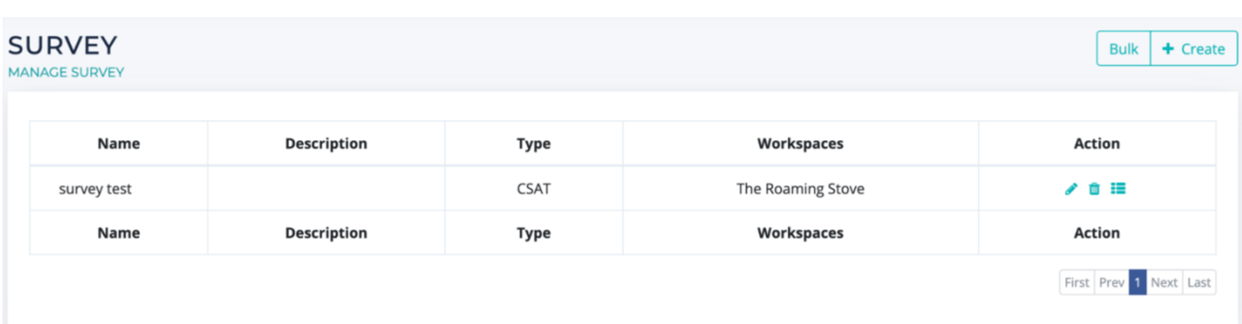
Creating a Post-Chat Questionnaire

A Post-Chat Questionnaire gathers customer feedback after interacting with the chat. It is a great tool for measuring the customer experience and ensuring that the customer's needs are being met.

Navigate to the Onboarding Tab and select **Live Chat**. Select the live chat to add a pre-chat questionnaire and click **Advanced Settings**. Click **Post-Chat Questionnaire** and enable Post-Chat Questionnaire.

If a survey is currently active, the survey name will display. Select **Add New** or **Update Existing Survey**.

To create a new survey, select **Create** or edit an existing survey by selecting the **Pencil** icon next to the existing survey.



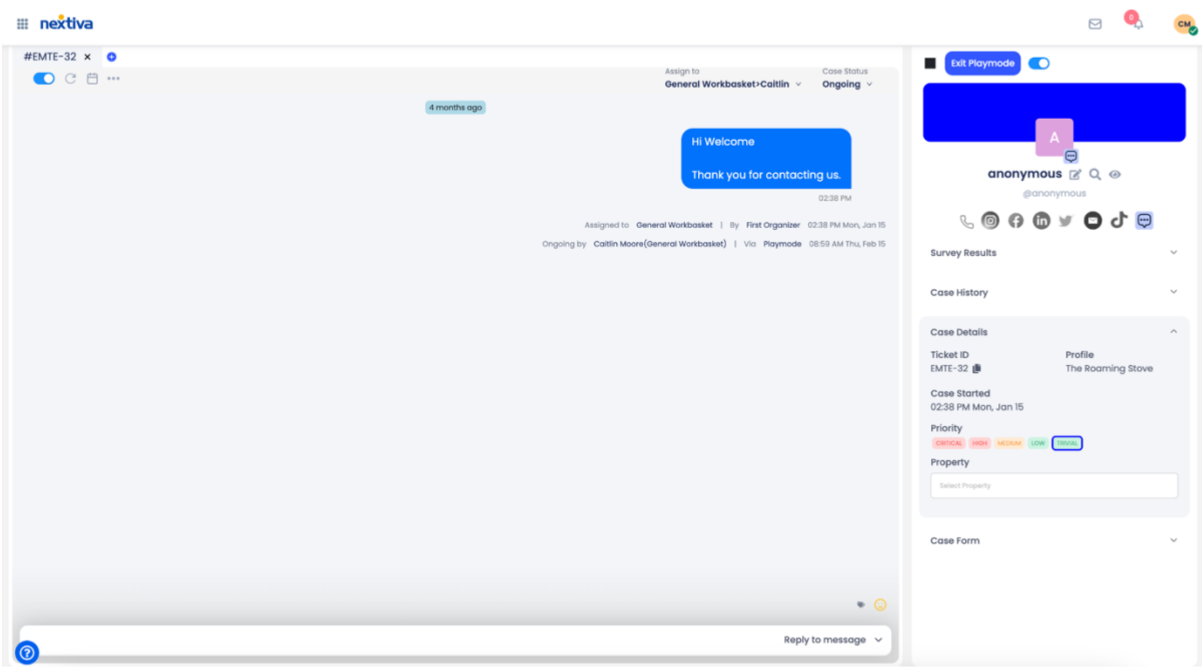
NOTE: To make a survey live, ensure that the Source in the Survey is Live Chat in the correct Workspace.

Responding to chat messages

All chat messages will go to the Unibox, allowing you to instantly view and respond to chat messages. The Unibox manages, monitors, and responds to interactions from all connected channels, including social media, email, chat, reviews, and more.

From the main dashboard, click **Unibox** to view and respond to chat messages. Open the chat message to view all information, including any chatbot history.

Select **Click Here to Start Working on this Case**. The case will then be assigned to you so you can respond. Click **Reply to message** and enter your response.



Filtering to only show chat messages

To see only Chat messages in the Unibox, navigate to the **Unibox** and select the **Filter** button. Select the dropdown next to the Workspace that the Live Chat is linked to and select the box next to the Live Chat. Multiple boxes can be selected at the same time. Click **Filter**.