

WEBCCHAT

Respond to customer inquiries directly through your website.

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Profiles

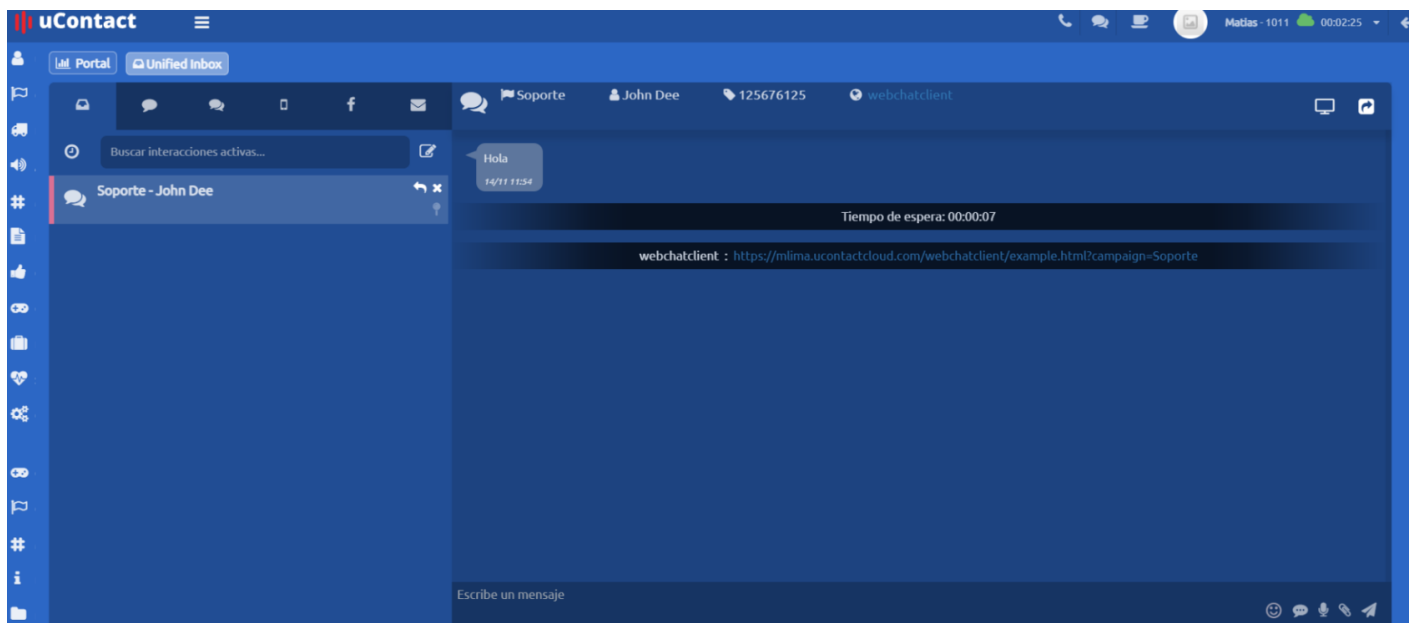
Agent

This section shows the Webchat interaction from the agent profile.

Interaction View

The agent will have access to different interactions in their inbox and will be able to search for them by campaign name or user name.

When an interaction is opened, it expands on the right side of the screen, displaying the conversation and customer information at the top.



- Webchat Campaign Name
- Contact Phone Number
- Contact Name
- Contact Email

At the beginning of the conversation, the customer's waiting time is displayed, showing the time elapsed from when the message was sent until the interaction was answered by an agent.

Interaction Options

The customer will be able to make voice calls and video calls with the agent.

The first option is the emoji icon. When clicked, it displays a list of emojis that can be used in messages.

To the right, next to the message input box where the agent responds to the customer, there is an icon containing the campaign's predefined responses. Once selected, these responses are automatically inserted into the message.

Next to it, there is the icon for sending voice messages.

To the right, there is the button for attaching files.

The following button sends the message written by the agent.

In the upper-right corner, the agent will find a three-dot menu icon that allows access to the customer's previous messages.

Supervisor

Webchat Campaign Monitoring

This section displays real-time statistics for Webchat campaigns. It shows the current status of each Webchat campaign in real time, based on the parameters configured during campaign creation.

Bottom-left table

↓↑	CANALES	ESTADO	AGENTE	COMPLETADO	ACTIVAS	⌚
👤		Activo	botbienvenida	0	0	08:02:59
⦿		Libre	Lili	0	0	00:01:11

Icon: Agent status icon. It may display a phone icon when the agent is on a call, or the corresponding break icon when the agent is in a pause state.

Channels: If the agent is handling an active interaction, the corresponding channel logo will be displayed (SMS, Webchat, among others). Multiple channel icons may appear simultaneously when applicable.

Status: Real-time agent status. Available statuses include: Disconnected, Busy, Available, Available on Break, and Busy on Break (where “Break” refers to any configured break status).

Agent: Name of the agents assigned to the campaign.

Completed: Number of completed interactions per agent.

Active: Displays the number of active interactions currently assigned to the agent.

Time: Displays the time elapsed since the agent’s last status change.

Interaction Status

Displays the status of the active interaction based on the time thresholds configured in the Campaign Settings under Chat Time. The available interaction statuses are as follows:

- The interaction status will be displayed in green while it remains within the first configured time threshold.
- The interaction status will be displayed in yellow while it remains between the first and second configured time thresholds.

- The interaction status will be displayed in red when it exceeds the second configured time threshold and beyond.
- When the agent does not have an active interaction and the third configured time threshold is exceeded, an alert will be displayed in the agent's status.

Bottom-right table

If the campaign has customers waiting in the queue, the table on the right will be populated as shown in the following image.

EMAIL	NOMBRE	EN ESPERA
test@test.com	test	00:00:05

This table displays each customer's email address, name, and the time they have been waiting for assistance.

Agent Actions

When you click on an agent with an active interaction, the following options will be displayed:



- **Spy:** Allows the supervisor to view, in real time, the messages exchanged between the agent and the customer.
 - **Screen Monitoring:** Allows the supervisor to view the agent's screen in real time. To display this option, Screen Monitoring must be enabled under Settings → Agents.
 - **Info:** Displays a window containing the agent's detailed information.
 - **Pause:** Allows the supervisor to place the agent into a paused state.
 - **Log Out Agent:** Allows the supervisor to log the agent out of the portal. The agent must sign in again using their username and password to resume work.
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Basic Settings

Administration

This feature enables real-time communication with customers through an online chat. Before using it, the required configurations described below must be completed.

- **Name:** The name used to identify the Webchat campaign within the system.
- **Strategy:** Defines the routing behavior the campaign will use when assigning interactions to agents.
- **Service Level:** Specifies the maximum time (in seconds) agents have to respond to interactions received by the campaign. If an interaction remains in the queue longer than the configured threshold, the service level will decrease. This metric can be monitored in the campaign's Supervisor Dashboard.
- **Schedule:** Defines the hours during which agents are available to handle interactions. If an interaction is received outside the configured schedule, the system will display an offline message informing the customer. This message can be configured using the Offline Message setting in the Advanced Settings section. Use the "+" button to add a schedule and the "-" button to remove the selected schedule from the list.

After saving the configuration, the campaign will be created in the system and displayed in the table on the right. This table lists all campaigns available in the system based on the user's assigned security group.

Webchat Audio and Video Calls

These features allow agents to communicate with customers through audio and video calls directly within their Clever Chat interactions.

Before using these features, **please consider the following requirements:**

Compatibilidad de Videollamadas

Escritorio

Sistemas Operativos:

 Windows

 Mac

 Ubuntu

Navegadores:

 Chrome v.80

 Edge v.80

 Firefox v.73

 Safari v.13

Móviles

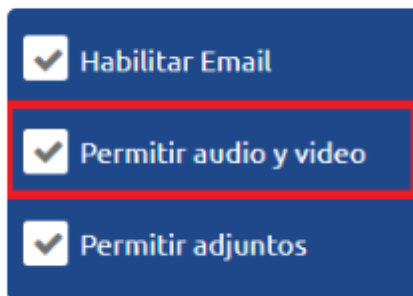
Sistemas Operativos:

 Android 9

 iOS 13

 iOS únicamente soporta el navegador Safari.

When the Allow Audio and Video option is enabled, customers will be able to see the audio and video call options in the upper-right corner of the Webchat interface after they are connected to an agent.



When the customer clicks either the audio or video call icon, the agent will immediately receive an incoming call notification. By accepting the notification, the agent and the customer will begin an audio or video call, establishing voice communication and, when applicable, a live video connection.



Bots in Clever Chat

Configurable Messages

Clever Chat provides several configurable messages that can be displayed or sent automatically at different stages of the customer interaction. For example, messages can be shown when no agents are available or when the campaign is outside its configured business hours.

Welcome Message

This message is displayed to customers when the Clever Chat campaign is available. Administrators can configure a custom welcome message for each supported language: Spanish (es), English (en), and Portuguese (pt). To do so, select the desired language and enter the corresponding welcome message.

Offline Message

This message is displayed to customers when the campaign is outside its configured business hours. Administrators can configure a custom message for each supported language: Spanish (es), English (en), and Portuguese (pt). To do so, select the desired language and enter the corresponding offline message.

Unavailable Message

This message is displayed when the maximum number of waiting interactions allowed by the campaign configuration has been reached. Customers attempting to access the chat will be notified with the message configured in this field.

Agent Automatic Message

This message is automatically sent to the customer when the interaction begins.

Offline Message

When the campaign is outside its configured business hours and this option is enabled, customers will be able to leave a message. The message can later be accessed and reviewed under the “Clever Chat Recordings” section.

Comments

At the end of the interaction, the message configured in this field will be displayed.

Brochure

Brochure CleverChat ENG