Admin Handbook

OVERVIEW

This handbook will allow you, as the admin/owner of the account, to get familiarized with all the menus and options found on your Account Dashboard. This will help you from the basics of how to set things up, to the advanced options that you can tinker around with to get the most out of ClickDesk. Should you have any account-related issues, you may refer to our FAQ page, Blog, send us an email or drop by our website directly so you can chat with us.

Hi there! I'll be dropping by from time to time with awesome tips as you move along through this manual. Click me to drop by our website and our support rockstars will be more than happy to help! Welcome to ClickDesk, enjoy your stay!

TABLE OF CONTENTS

1. Getting to know your Account Dashboard
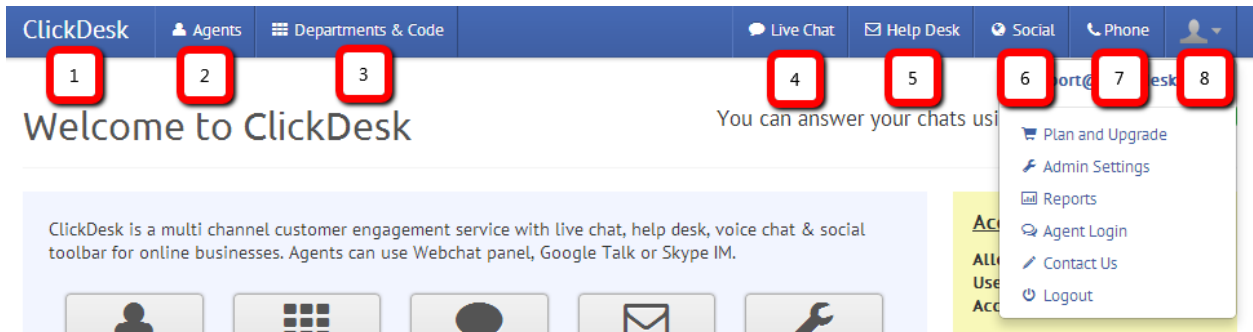
Your Account Dashboard showcases a top menu that pretty much explains everything - broken down into sections, here's quick rundown on what to expect from each menus:

1. **ClickDesk** - Homepage where you have the quick navigation buttons, summary reports, recent chats and tickets and account overview
2. **Agents** - Page where you can add, modify, or delete your agents
3. **Departments & Code** - This is where you can find your HTML/JS codes, where you can add, edit or delete Departments
4. **Livechat** - Anything about the livechat aspect will be placed here. This is where you customize the look and feel, localization, shortcuts and much more
5. **Helpdesk** - This is where you can setup your macros, automations, enable or disable the Helpdesk feature
6. **Social** - Page where you can setup your Facebook and Twitter profiles
7. **Phone** - This is where you can setup where and how you want to receive calls
8. **Avatar** - Anything that is account related is placed here

1.1. Home - ClickDesk

1.1.1. Agent Panel login

At the top right hand corner of your homepage is a big link pointing to your account's
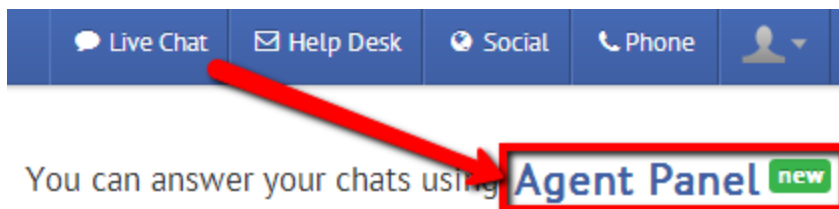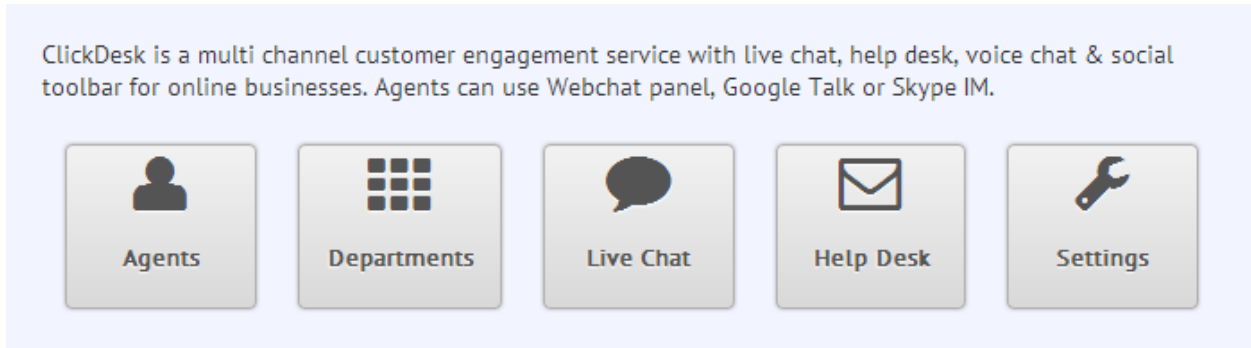
Agent Panel login. Clicking that link will open a new window where you (or your

agents) can handle your chats.
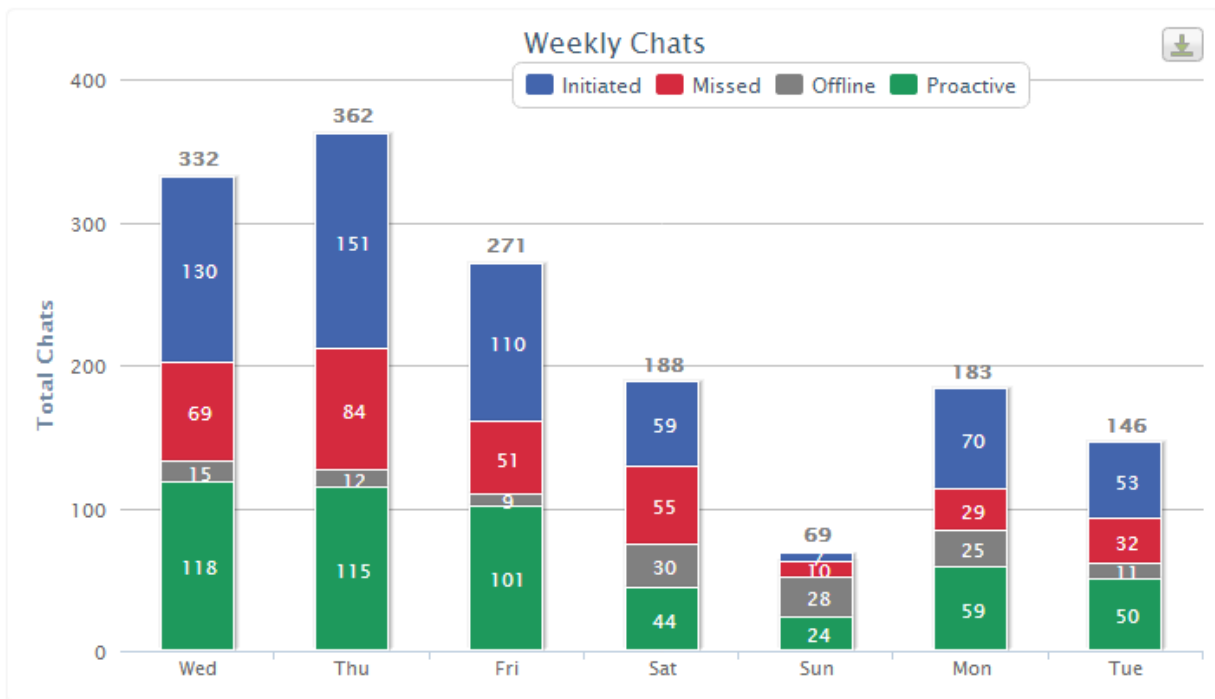
1.1.2. Quick navigation

Along with the menus at the top, as soon as you login, you will be presented with these buttons that you commonly visit on a daily basis as the admin - make sure you utilize them :)

ClickDesk is a multi channel customer engagement service with live chat, help desk, voice chat & social toolbar for online businesses. Agents can use Webchat panel, Google Talk or Skype IM.

Agents	Departments	Live Chat	Help Desk	Settings

1.1.3. Weekly chat stats

As the admin, I bet you wanted to stay on top of your game by having a good look on actual stats and numbers. Seeing a weekly chat stat right on your homepage should give you a general idea on how effective you're using ClickDesk on your website

Weekly Chat Stats

Weekly Chats

Legend: Initiated — Missed — Offline — Proactive

Total Chats (y-axis, 0 to 400)

Day	Total	Initiated	Missed	Offline	Proactive
Wed	332	130	69	15	118
Thu	362	151	84	12	115
Fri	271	110	51	9	101
Sat	188	59	55	30	44
Sun	69	10	10	28	24
Mon	183	70	29	25	59
Tue	146	53	32	11	50

<mark>*This graph is only available to paid plan users</mark>

4

1.1.4. Recent Chats

Another nifty section on your homepage is the recent chats table. This area will show you the 5 most recent chats you received and a link* pointing to your reports section if you want to review all of them

*clicking the More... link will route you to the Reports page. To view the chat transcripts, click the Chat Transcripts tab

Recent Chats

Date	Type	Visitor	Agent	Message	Feedback
18 minutes ago	Offline	🇺🇸 ⊞ ◯	---	How do I update the …	☆☆☆☆☆
21 minutes ago	Offline	🇺🇸 ⊞ ◯	---	Well done! Plugin ha…	☆☆☆☆☆
22 minutes ago	Offline	🇺🇸 ⊞ ◯	---	how do I update the …	☆☆☆☆☆
42 minutes ago	Offline	🇺🇸 ⊞ ◯	---	How can I add chat to…	☆☆☆☆☆
about an hour ago	Offline	🇺🇸 ⊞ ◯	---	Hell, I DO NOT BELIE…	☆☆☆☆☆

More…

1.1.5. Recent tickets

Recent Chats? How about we add a bit of your Recent Tickets? Another section on your homepage shows your 5 most recent tickets. Do note however, that these aren't clickable links that will point you to the actual ticket content. You still need to go to your Agent Panel and click the Helpdesk menu at the top to view all of your Helpdesk tickets.

PRO TIP: Remember, you can access your agent panel on this same page by clicking the AGENT PANEL link at the top-right hand corner of yoru Dashboard's homepage.

It would be easier to remember if you will bookmark that link so you can access it anytime

1.1.6. Account overview

Now focus your attention on the right section of your homepage where you can see your Account Overview This will show your current plan, how many agents you have purchased, the subscription term you are in

(monthly, yearly, or 2 years) and your Account Status. If it shows Canceled or Suspended, your Dashboard will be locked out and you need to re-upgrade your account in order to use ClickDesk again.

1.1.7. Agents and Websites

This panel will show you all your agents, their status, and *all the domains where you have installed your chat widget. The only purpose of this section is to list down and give you an overview about your agents and websites

*NOTE: Once you install ClickDesk on a certain domain and you start handling chats from there, the domain will automatically be shown on this list. There's no reason for it to be removed/deleted since this is just for your reference

1.1.8. Blog posts

The last section on your Dashboard's homepage are the most recent blog posts from us. Use this as your reference and to keep yourself up to date with the latest features and guides we constantly post on our Blog.

1.2. Agents

The Agents page will be the place to go should you want to add, edit, or delete an agent. This is also where you will setup their Agent Panel credentials, their IM Client info, their image, capabilities, and much more! As the admin, you too can act as an agent if you want to. Refer to the Agent's Handbook for a more detailed look on how to use ClickDesk on the Agent's perspective.

REMINDER: The agent page shows all of your added agents in a table format. Clicking on each row corresponding to that agent will show you the options for that clicked Agent. Make sure you know how and where to edit and update your agents' info.

1.2.1 Agent Profile

This is the first tab shown on your agent's page when you click on your agent (or when you first add an agent). The fields required on this section are relatively straight forward and self-explanatory. This is where you set your agent's name, nickname, credentials, and image.

1.2.2. IM Network

Aside from our Agent Panel, you have a choice of handling chats on IM Clients too (Skype/GTalk). You may refer to Section C of the Agent's Handbook before you decide what works best for you or your agents. The IM Network tab has a single option - and that is to select on which IM Client you would like your agents to handle chats. When you select Skype, you need to enter your agent's Skype ID, and for GTalk, your agent's GTalk ID.

PRO TIP: GTalk is an XMPP-based IM Client that can be integrated with tons of 3rd party IM Clients (for PCs, MACs, and mobile). Should you feel the need to chat on the go, we suggest you pick GTalk as your IM client.

1.2.3. Voice/Video

This tab will allow you to set your agent's capability to receive voice/video calls. The first two checkboxes only apply if you are using our browser-based Agent Panel. If you, however, would like your agents to receive voice calls on Skype from their mobile phones, or you want to route the calls directly to their respective extension numbers, then this is where you can set them. Note that receiving calls on IM Clients and US-based numbers are only available on Social and Lighten Theme users. So make sure you change your theme first if you want to receive calls in this manner.

*Receiving calls in Skype and US-based numbers only work on our paid plans

1.2.4. Advanced

This tab will allow you to change 2 things - the Agent Level and max Concurrent chats the agent can handle. Agent Levels refer to who receives chats first:

➔ Level 1: Will receive chats first
➔ Level 2: Will only receive chats if Level 1 is offline or busy*
➔ Level 3: Will only receive chats if both Levels 1 & 2 are offline or busy

*Busy means the agent has reached his max concurrent chats

Concurrent Chats on the other hand refers to the max number of simultaneous chats the agent can handle:

➔ eg. Setting the max concurrent chats to 5 would mean the agent can handle up to 5 chats at a time

➔ The max allowed concurrent chats per agent is 5
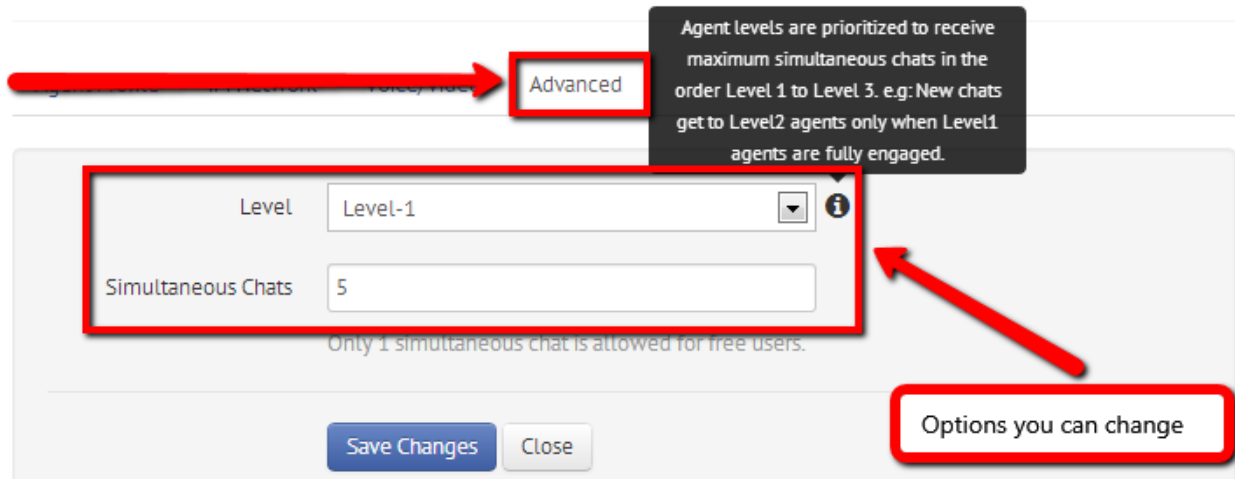
1.3. Departments & Code

The Departments & Code page is where you will manage the Departments you created*. The idea behind Departments is to help you filter and route chats to specific agents based on their specialty. You can create your Support, Billing, Sales, and General Inquiry Departments for your domain, and place the unique codes per Department to specific pages on your site.

➔ You may use the Support Dept codes for your member's area

➔ Have the Billing Dept codes deployed on your billing pages

➔ Insert the Sales Dept codes to your landing or checkout pages

➔ Or use the General Inquiry Dept codes to non-logged in visitors

NOTE: Another use of Departments is if you want to filter chats per domain (if you have multiple websites to handle).

➔ Create a Department for Domain A and only include Agent A within it

➔ Create a Department for Domain B and only include Agent B within it

➔ And so on..

*You can only have 1 Dept on the Free Plan, 3 Depts with Lite and unlimited Depts on Pro

1.3.1. Livechat Code

This tab contains the codes you will need to paste on your site's source code (just before the closing body tag). However, if you're using a popular CMS that we support, you may use one of our plugins to make the setup easier. This way, no coding is required and all you have to do is install the plugin.

PRO TIP: If you want to use an image/text link on your website that will launch the chat widget at the bottom once its clicked, you may get the codes on this same page by clicking these links

CUSTOM IMAGES & TEXT LINK
You can also add custom images or text link on your webpage to initiate the chat window.

1.3.2. Helpdesk Code

This is an account-specific Email ID where you can forward emails to convert them into tickets automatically. First, you need to understand how our Helpdesk works in order to fully utilize its features and function. With our Helpdesk, there are 3 ways to receive tickets:

➔ When visitors click the Helpdesk envelope icon at the bottom of your chat widget
  ◆ This is the easiest way, no setup required, to start receiving tickets
➔ When they send an email to your support email (eg. support@domain.com) and you have setup email forwarding from that email to your unique Helpdesk Email
  ◆ This will require you to do an email forwarding from your email to your Helpdesk. We have some readily available help pages at the bottom of the Departments page to help you get started. But if your email provider is not listed, you will most likely get help from your provider's support website.
➔ Or when you send an email directly to your Helpdesk Email ID
  ◆ This is useful if your Web Developer can link your website's contact us form to send emails directly to your Helpdesk Email. This way, you can have those contact us queries converted into tickets automatically.

1.3.3. Departments

Moving on the tricky part of this page would be the Departments option. Notice at the top right hand corner of the page, you will see a drop-down menu for your Departments and a button to add one. Selecting a Department from the drop down menu will show the unique HTML codes for that Department, and new
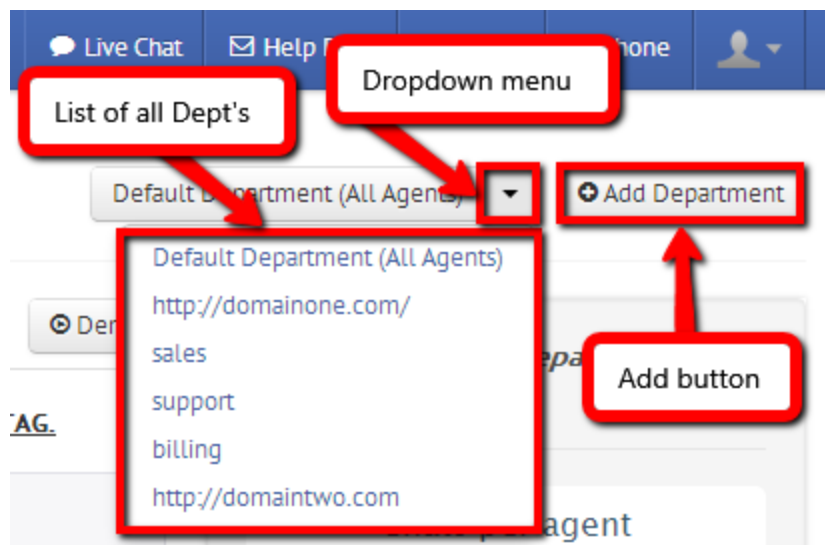
options on the right panel to Edit or Delete it. Remember, each Department has a unique set of HTML codes AND Helpdesk Email ID. Let's pick one of the Departments shown on this image (sales) so you have a general idea on how it looks like:

Departments & Code

Live Chat & Phone Code   Help Desk Code

COPY & PASTE THE BELOW CODE ON YOUR WEBSITE PAGES JUST BEFORE

```
1.   <!-- ClickDesk Live Chat Service for websites -->
2.   <script type='text/javascript'>
3.   var _glc =_glc || []; _glc.push('ag9zfmNsaWNrZGVza2NoYXRyEQsSB3dpZGdldHHMY7a22jg
     EM');
         ...ation.protocol) ? 'https://my.clickd
         ...owser/');
6.   var glcp = (('https:' == document.location.protocol) ? 'https://' : 'http://');
7.   var glcspt = document.createElement('script'); glcspt.type = 'text/javascript';

8.   glcspt.async = true; glcspt.src = glcpath + 'livechat-new.js';
9.   var s = document.getElementsByTagName('script')[0];s.parentNode.insertBefore(gl
     cspt, s);
10.  </script>
11.  <!-- End of ClickDesk -->
```

Points of interest: These 2 will now have their corresponding unique codes and email ID

New options to Edit/Delete → Edit | Delete

Agents in *sales*

Chats per agent

List of all agents "included" in Sales Department

Michelle Jim Mary Joe
Zack Kirk John Van

1.3.4. Custom images and text links

If you want to launch the chat widget at the bottom using an image or text link that you can place anywhere on your page, then this option will come in handy. The idea behind this is to paste some lines of HTML codes where you want it to appear, then upload your own online/offline images. The image will toggle automatically based on your agent's availability. Here are the stock images we have, along with the HTML codes you will paste to render the image visible on your page:

NOTE: To view this popup, just click the Departments & Code menu at the top, then click the "Custom Images" link. Likewise, if you only want to use a regular text link, click the "Text Link" link at the bottom.

1.4. Livechat

Everything about the livechat aspect of your account can be found under the Livechat menu. This is where you can customize your chat widget, change the language, manage your proactive chats and shortcuts, and much more.

1.4.1. UI & Themes

Pick a theme, change the color, upload your default chat image, show your brand and much more - those are the things you can do with this tab. Under this tab, are 4 more sections that you need to take note of:
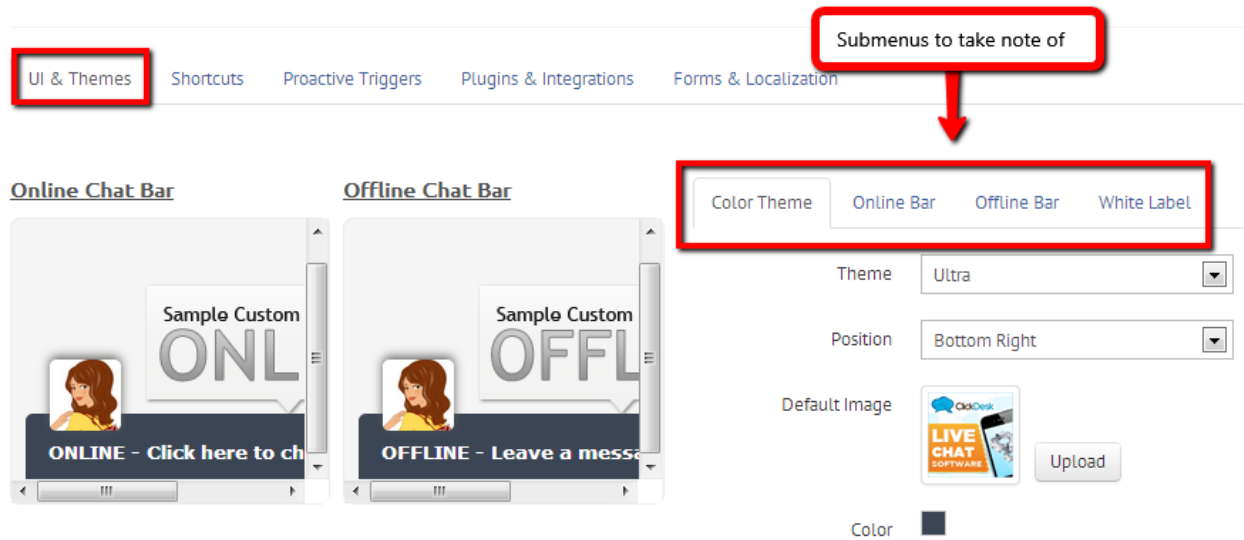
➔ **Color Theme** - This is where you can change the theme, position, default image, and color of the chat widget
➔ **Online Bar** - This is what the chat widget looks like when it's minimized and your status is Online. You can pick an eye-catcher from a variety of choices or upload your own*. This is where you can also change the default text on the minimized chat bar, in case you want to localize your entire chat widget.
➔ **Offline Bar** - Similar to above, but only applies when your status is offline
➔ **White Label**** - This is where you can upload your own company logo and replace ours, or you can just simply hide our presence from the chat widget.

*Using custom eye-catchers is only available to paid plan users
**White Labeling is exclusively available to Enterprise Plan users

1.4.2. Shortcuts

If you want to view all the available system commands that you can use, or setup your own shortcuts for your agents, this is the page where you can do those. Since agents can use either our Webchat or IM Clients to handle their chats, we'll list some pointers on how to setup your own shortcuts:
➔ When creating shortcuts, ALWAYS use the / prefix (eg. /hi)
➔ When agents use shortcuts on our Webchat or on GTalk, the command will be the same /hi
➔ With Skype though, the shortcut will become \hi - reason is that Skype uses the forward slash / for its own internal commands

1.4.3. Proactive Triggers

In this section of the Dashboard, you can create, modify or delete your Proactive Triggers. By default, our system will setup 2 Proactive chat rules for both first time

visitors and returning visitors. The labels of the dropdown menus on this page are pretty straight-forward, but if you need an in-depth guide, refer to the following links - What are Proactive chats and How to setup Proactive Triggers

> REMEMBER: Whenever you make changes to your proactive triggers, whether you add, remove, or change your settings - it won't reflect immediately to your website since our proactive triggers rely on browser cookies. To see the changes, you need to clear your browser's cache and cookies and that should do it ;)

1.4.4. Plugins & Integration

The name of the menu already explains what to expect in this section - this is where you can setup your CRM Integrations and other platforms that we integrate with. Don't fret, each and every item on this page will have it's corresponding help page. All you have to do is click on the CRM you would like to use, then click the "Learn More…" link to visit our detailed help page on how to set it up.

*Integration only works on Pro and Enterprise Plan users

1.4.5. Forms & Localization

Hablas Español? No problemo with our localization options. There are basically 2 ways to localize the chat widget:

A. It's either you translate all the fields by yourself (for a more personalized touch)

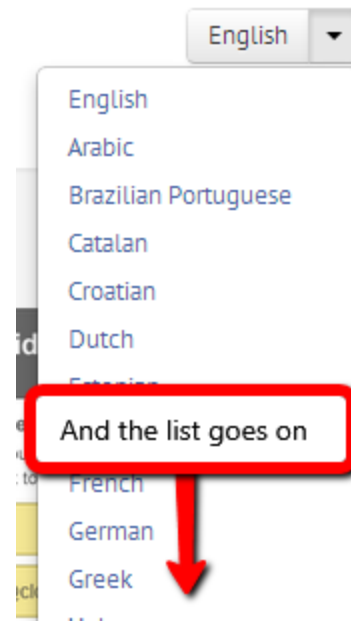| Online Form Settings | Offline Form Settings | Chat Transcript Settings | Status Message Settings | Ticket Form Settings |

❏ NOTE: All these clickable menus shown above contain most of the English texts found in the chat widget

B. Or just pick your language from the drop down menu

Some things to take note of regarding localization:

❏ You can only select a single language per account
❏ Free Plan users are limited to selecting our readily available translations
❏ Paid Plan users can still pick their language, then customize it further later on per field
❏ System messages can't be customized as of yet
❏ Only the front-end of the chat widget will be localized and not your Dashboard/Agent Panel

English ▾

English
Arabic
Brazilian Portuguese
Catalan
Croatian
Dutch

And the list goes on

French
German
Greek
Hebrew

1.5. Helpdesk

1.5.1. Reports

This page is solely for setting up your Helpdesk Reports (ticket statistics). You can have your Reports sent daily, weekly or monthly. If you want to stop receiving reports, just set it to never. Weekly Reports are being sent every Saturday while Monthly Reports are being sent at the end of each month. You may add multiple emails on your routing list by separating them with commas.

1.5.2. Macros

When an agent handles tickets, most likely there are scenarios where repetitive tasks are done on a regular basis. To save time, you can create Macros that will fit your requirements. A good example on how to use a Macro is when a customer replied to a ticket and it needs immediate attention. What you can do is setup a Macro to send an IM Alert to your best agent, assign the ticket to him, then change the ticket status to Urgent. That's in layman's term and here is how it would look like when you set it up:

Here's an example of how the agent will receive the message on Skype after executing the Macro:

There are a couple of options you can choose from - you can send an IM to your agent, send an email, or send an automated reply to your customer, all with a single click of a button. However, please note that the IM Agent action won't be performed if:

➔ You don't have an IM Network setup for your agent (refer to 1.2.2. to know how).

➔ Your agent's online presence is set to Away, Invisible, Do not disturb, or Offline. The agent has to be online and need to have the contact bots added to his IM.

To use a Macro, just head over to your Helpdesk page, open the ticket, scroll down to the bottom and click the small gear icon underneath the message reply textbox.
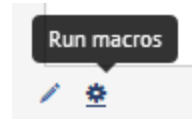
1.5.3. Canned Responses

Similar to Macros, this feature will make your agent's life easier. If we have Shortcuts for chats, we have Canned Responses for tickets. Setting it up is a giveaway, all you have to do is pick a name for your canned response, then enter the corresponding message to automate.

To use Canned responses, go to your Helpdesk, open the ticket, scroll down to the bottom and click the small pencil icon.
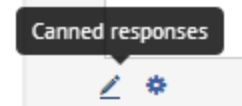
1.5.4. Widget Settings

You can toggle your Helpdesk feature on this page. By default, the Helpdesk feature is enabled on your account and customers can send you tickets right off the chat widget. However, if you don't want that kind of setup, you may untick the "Enable Helpdesk" checkbox on this page to remove it from your chat widget. The options below that will give you the choice of which Departments will be shown on your chat widget. This way, visitors can choose which Department they want to reach.

1.5.5. Automations

This is another nifty feature that lets you setup automated replies for your agents and visitors alike. Say, a visitor sent you a ticket, and you want to send an automated reply acknowledging that your system received the ticket - you can then setup an automation that will send an email to the visitor for each and every new ticket that you receive. To give you a better view, here's a quick rundown of all the actions you can automate:

- → **Status** - set the ticket status to open, closed or pending
- → **Priority** - set the priority to normal, medium or urgent
- → **Email user** - you can either select the "requester" in this case the visitor who sent the ticket or you can email one of your agents
- → **Email group** - this will send an email to all agents belonging to the group/department selected
- → **IM agent** - this will send an IM alert to the agent (either via Skype or GTalk)
- → **IM group** - this will send an IM alert to all agents belonging to the group/department selected
- → **IM Ticket owner** - the ticket owner will receive an IM

- ➔ **IM Ticket group** - all agents belonging to the group/department selected will receive an IM
- ➔ **Group** - assign the ticket to a group/department
- ➔ **Assignee** - assign a ticket to a specific agent

NOTE: All actions listed above will trigger as soon as the ticket arrives to your Helpdesk.

1.6. Social

With this unique feature, your visitors can LIKE your Facebook page, FOLLOW you on Twitter or Tweet the exact page they're viewing on your website.

1.6.1. Twitter

With the recent update of Twitter's API, you would be required to allow access to ClickDesk within your Twitter account. To set it up, just go to the Social menu then click the "Add Account" link underneath the Twitter option. An in-depth guide can be found on our blog

1.6.2. Facebook

Setting up your Facebook page is a walk in the park. All you have to do is enter your FB Page's URL and that's it. However, there are a couple of things you need to consider to make this work:

- ➔ You should have a proper page username (or vanity URL) for your page. A good example is http://facebook.com/clickdesk where "clickdesk" is the page's username (the part that you need to enter on the Social page)
- ➔ Facebook Pages have certains settings that might hinder the page to be populated on your chat widget. If you have set an age or country restriction on your FB page, then users who are not logged in to their Facebook accounts won't see the integration. Likewise, those who did not meet your page requirements (eg. minor, restricted country, etc.). To avoid such things, just remove your page restrictions found on your Facebook Page settings

1.7. Phone

This page allows you to setup your default phone settings. Remember that this setting only applies to those visitors who will call you without initiating a chat first. Remember section 1.2.3. where you can only receive calls on IM and US-based numbers based on the theme chosen? You also need to take that into consideration when setting this up. So, if you prefer to receive calls even without an active chat session, you need to meet the following requirements:

- ➔ You need to be on a paid plan
- ➔ Setup an IM Network profile for your agent

➔ Add invoxwidget for Skype users and invoxwidget@gmail.com for GTalk users
➔ Ensure you use either the Social theme or Lighten theme

1.8. Avatar

The last piece of the Dashboard's menu would be the Avatar, where all account related settings are available. As the admin / account owner, you would most likely spend most of your time checking the admin settings page for your billing info, update your card, change your email notifications and lots more.

1.8.1. Plan and Upgrade

This is where you go if you want to upgrade, downgrade or cancel your subscription. Things to note when on the upgrade page are as follows:

➔ It's composed of 3 sections - the top part is where you pick your subscription term (monthly, yearly, biennial), middle part is where you pick your plan (Lite, Pro, Enterprise) and the last part is where you set the number of agents you want to purchase

➔ Note that you'll get cheaper monthly rates as you move to a longer term but the payment will still be upfront.

➔ At the bottom, you may select on using your Credit Card or Paypal. If you chose a monthly plan, you are locked to using Credit Cards only. On yearly/biennial subscriptions though, you may use either your card or pay via Paypal.

➔ Upon proceeding to payment, you will get to see the "actual" price you need to pay and a summary of the subscription. We highly recommend you also review our TOS before upgrading so everything is crystal clear

➔ For upgrading and downgrading your subscription, the steps are the same and will also be done on this page

➔ Should you wish to cancel your subscription, we'd appreciate it if you could contact us first if its there's an issue with the product. Nonetheless, the cancel link will be shown on the right part of this page

1.8.2. Admin Settings

This submenu contains most of the things related to your account. Here, we'll list all the tabs shown on that page and their corresponding usage:

➔ **Password** - For users who created their accounts the traditional way using an email/password combination, this is where you can change your password. For those who used Google/Yahoo Open ID upon registration, this page is not needed.

➔ **Email Notifications** - If you want to change, add, remove emails on your routing list for Chat Transcripts and Offline Messages, this is where you can do it. However, make note that this feature is only available to Pro and Enterprise Plan users

➔ **Report Notifications** - Since there's an option for Helpdesk Reports (shown on section 1.5.1.) this is where you can set your Chat Reports. You may also set it to Daily, Weekly or Monthly.

➔ **Domain Settings** - Remember section 1.1.1. where the Agent Panel login was mentioned? The page that opens up when you click that link is what your Domain Settings refer to. You can basically setup your own subdomain name so your agents can remember it easily (eg. http://mycompany.clickdesk.com/ or http://mydomain.clickdesk.com/)

➔ **Billing History** - This page is where you can check all your previous payments along with the invoices per payment made.

➔ **Billing** - If you want to change your plan, or update your card details, this is where you can get it done

- ➔ **ClickDesk API Key** - If you are working on a backend to fetch relative info about your visitor's info, previous chats and tickets, you may use this unique API Key along with our REST API help page
- ➔ **Manage Users** - This only applies to users who created their account using a regular email/password. If you wish to add another admin that will access your account, you can add an Alias on this page. Here's a detailed article about this feature

1.8.3. Reports

As an admin, this page is a datamine if you want to gauge how our software helps you. Although you won't get actual stats for your conversions, you'll get your hands on actual data on how your agents perform, how many visitors use the service, gather your leads, followup missed chats, check if your target audience goes online during office or non-office hours, then potentially followup with them. This page is composed of 3 tabs - Chat reports, Chat Transcripts and Ticket Helpdesk reports.
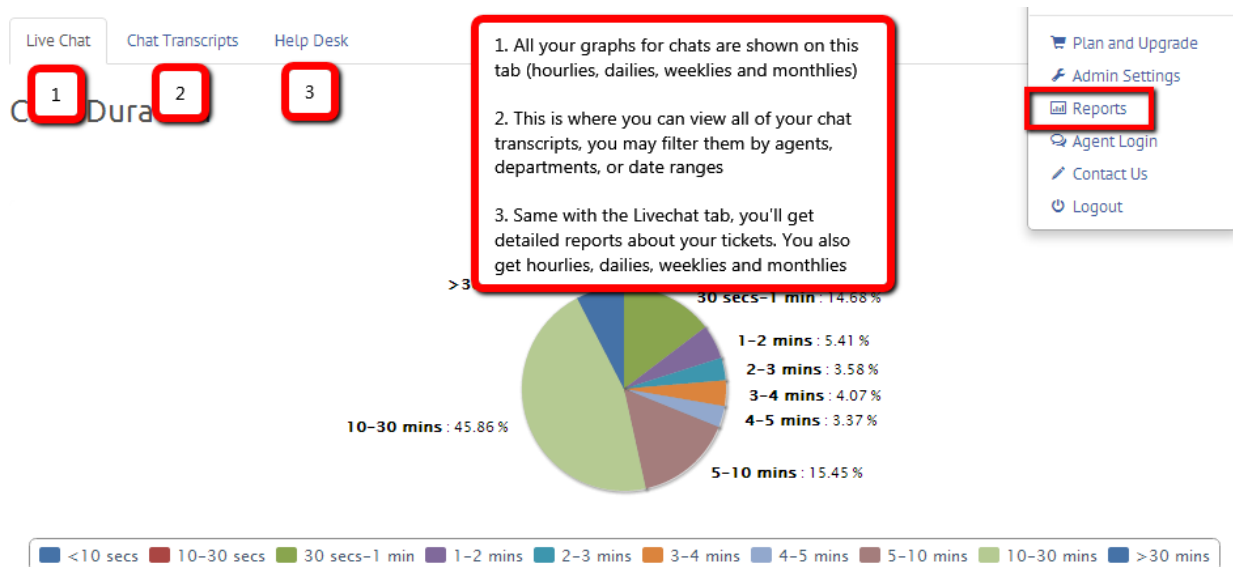
1.8.4. Agent Login

Similar to Agent Panel link on your Dashboard's homepage, this is also a quick access link to get your Agent Panel

1.8.5. Contact us

You found a bug, have a query, a suggestion or feedback on how to improve ClickDesk, this is where you can also get in touch with us. We take suggestions and feedbacks seriously so please drop us a note if you find something useful that we're missing on our features

1.8.6. Logout

And lastly, as the menu name implies, this is how you logout of your Dashboard.

2. Setup & Installation

ClickDesk virtually works with any platform, be it on a localhost, a site built from scratch, a site powered by commercial CMS or custom ones - for as long as you can freely insert HTML/JS codes to your source code without any restrictions. However, there are certain providers where your capabilities are limited as a security precaution, there's Google Sites, eBay listings, and other platforms where insertion of Javascript codes is prohibited. With that in mind, it is imperative you consult with your web developer or provider if it's possible to do the aforementioned.

2.1. Manual pasting of codes

If your site is built from scratch, you're testing on a local HTML file, or if you're using your own custom CMS, then this is how you install ClickDesk on your website. The idea behind ClickDesk is that the chat widget will only appear on pages "where the codes are present". So to install it, just head over to the Departments & Code page, copy the lines of HTML/JS codes, then paste it onto your source code. We normally advise users to paste the codes just right before the closing </body> tag for faster page rendering - this way, your site's content (DOM elements) will be loaded first before the actual script.
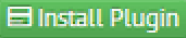
2.2. Using our plugins

So, you're using Wordpress, Joomla, Magento and other commercial CMS on your website? No biggie - we try to keep things simple in ClickDesk, thus the reason why we have tons of plugins to offer. To get a full list of all the platforms we support, please go to our plugins page. Just pick what you're using and all the things you need, including a detailed step by step instruction, will be listed there.

> REMINDER: You can only pick one of the options we offer to install ClickDesk on your website. Avoid using both steps to avoid issues with your chat widget.
> If you pasted the codes, you won't need the plugins (and vice versa).

3. Common FAQ's

➔ I've installed it on my website, what now?
  ◆ All that's left is login to your Agent Panel to start handling chats, calls and tickets. Refer to sections 1.1.1. and 1.8.4.
➔ I'm online, but my page shows offline?

- Try refreshing your website first, our chat doesn't load asynchronously and won't automatically go online upon logging in. You need to reload the page first to properly reflect your current status. You may always double-check your real-time agent status on the Agents Page
➔ I've installed the plugin but can't see it on my website?
    - Installing the plugin is one thing, but to have the plugin insert the codes automatically, you need to go to the Departments & Code page and click the ⊟ Install Plugin button.Refer to section 2.2.
➔ How do I receive chats on my mobile phone?
    - You would need to setup an IM Network profile for your agent to receive chats on your phone. Refer to section 1.2.2.
➔ Do I have to stay in front your Agent Panel the whole day in order to receive chats? How will I get notified?
    - Yes, you have to keep that page open to keep your online status. We highly recommend you use Chrome when using our Agent Panel since this is the only browser that has a built-in desktop notification. This way, you'll get popups on the lower-right hand corner of your desktop for each and every chat that comes in.
➔ How do I receive voice/video calls?
    - You need to use our Agent Panel to enjoy these awesome features. The good thing about our own webchat is there are no setup required. By default, once an agent has been created, he can start receiving chats, calls and tickets right on the Agent Panel
➔ How about tickets, where can I find them?
    - It's on the Helpdesk menu of your Agent Panel. Refer to section 1.3.1 of the Agent Handbook
➔ Why do I have a lot of missed chats? My customers are complaing!
    - Remember, you (and your agents) are solely responsible for your site's availability. Make sure you educate your agents to properly logout so they will appear offline on your website. This way, you're setting proper expectations to your website visitors and this will lessen the number of your missed chats. Refer to sections 1.1.2, 2.1.2, and 3.1.2 on the Agent Handbook to know how to logout based on the tool your agent uses to handle chats
➔ Okay, your product is awesome, but I think I would need to add another agent. How can I do that?
    - You may start by purchasing another agent on your account. Just go to the upgrade page and add another agent. Once the payment has been

processed, you may now add your 2nd agent. Refer to section 1.8.1. on how to upgrade and section 1.2.1. on how to add an agent.