

Moffice CRM Live Chat

Introduction

Live Chat is a fast way to connect with curious inquirers from your company's Website. Leads, Potentials, or Customers are linked to your business' chat system through the Live Chat link so Reps can reply to contact inquiries immediately through the convenience of Moffice Talk messenger. In addition, Moffice CRM records the chat conversations so you can link them to a contact's record or review them to better manage best practices for Live Chat responses.



Setting up Live Chat for your company involves a few steps. We cover the following topics for Live Chat here:

Setup

- [Admin] Create Live Chat Groups
- [Admin] Add Live Chat Representatives

Usage

- [Customer] Access Chat
- [Rep] Respond via Talk
- [Rep] View Records & Connect
- [Manager] Check Analyses

[Admin] Create Live Chat Groups

Start setting up your business' Live Chat by logging into your admin postmaster account, then head to Messenger > Live Chat group list. From here, click "Register Live Chat staff group" and enter the fields required. Remember to click "Create Group Key" to create a new key for the group! After filling out all the information, click "Register group" at the bottom of the form to create the new group.

[Messenger]

- Auto Login
- Auto Time-punch for Timecard
- Access history
- Absence time
- Lock time
- Log off time
- Duplicate Log In
- Delete Transfer File
- List Users Logged In

[Live Chat staff]

- Live Chat staff list
- Live Chat group list

Help desk

Live chat staff Group List

No.	Group Name	Domain	Date entered
1	Customer Service	crm.officesuite.com	2015-09-09 11:24:11

[Register Live Chat staff group](#) [Delete](#) [Link URL](#)

Group Key [Search](#)

Set Live chat staff Group

[Register group](#) [Cancel](#)

Group Name

Group Key [Recreate Group Key](#)

Domain

Available day of the week Sun Mon Tue Wen Thr Fri Sat Everyday

Available time ~ 24 h

Register Banner No file chosen (160 X 60)

Status

Memo

[Register group](#) [Cancel](#)

To modify an existing group, click on its Group Name and the contents will appear in the form below, ready for editing. To delete a group, simply click the check box next to its name and press the delete button below.

[Admin] Add Live Chat Representatives

After creating your Live Chat Groups, add Representatives by going to Messenger > Live Chat staff list. Fill in the needed fields and click “Register Live Chat staff” to add that person to the list. The Group selection in the drop-down must be Note that “List name” is the name that appears on the list and must be unique to each Representative.

Help desk

Help desk list

<input type="checkbox"/>	Number	Name	Name/Dept	Group Name	Date entered	Status
<input type="checkbox"/>	2	CS Reps - Henry	Henry Associate / CS	Customer Service	2016-03-01 16:42:23	Use ▼
<input type="checkbox"/>	1	CS Reps - Vivienne	Vivi Senior / CS	Customer Service	2015-09-09 11:24:46	Use ▼

[Modify selected list](#) [Delete](#)

1 |

Name ▼ [Search](#)

Register Live chat staff

[Register Live Chat staff](#) [Cancel](#)

List name

Select Live chat staff

Group

Status

Memo

[Register Live Chat staff](#) [Cancel](#)

Modifying and deleting Live Chat Reps are done the same way as Live Chat Groups. Click the list name of the Rep to modify to change their information. Check the box to their name and click delete to remove them from the list.

Help desk

Help desk list

<input type="checkbox"/>	Number	Name	Name/Dept	Group Name	Date entered	Status
<input type="checkbox"/>	3	Sales Reps - Jamie	Jamie Bronte Senior / Sales	Sales Representatives	2016-03-02 16:49:34	Use ▼
<input type="checkbox"/>	2	CS Reps - Henry	Henry Shakespeare Associate / Customer Service	Customer Service	2016-03-01 16:42:23	Use ▼
<input type="checkbox"/>	1	CS Reps - Vivienne	Vivienne Angelou Senior / Customer Service	Customer Service	2015-09-09 11:24:46	Use ▼

[Modify selected list](#) [Delete](#)

1 |

Name ▼ [Search](#)

Register Live chat staff

[Modify Live Chat staff](#) [Cancel](#)

List name

Select Live chat staff

Group

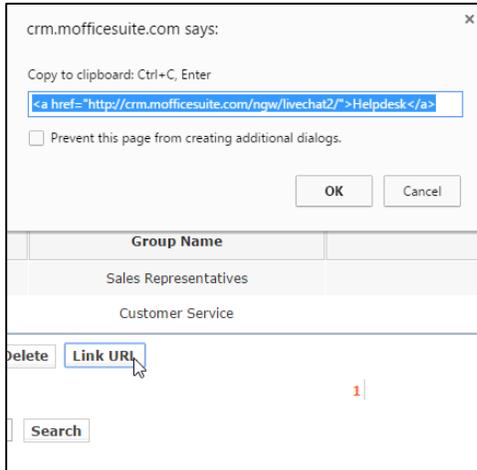
Status

Memo

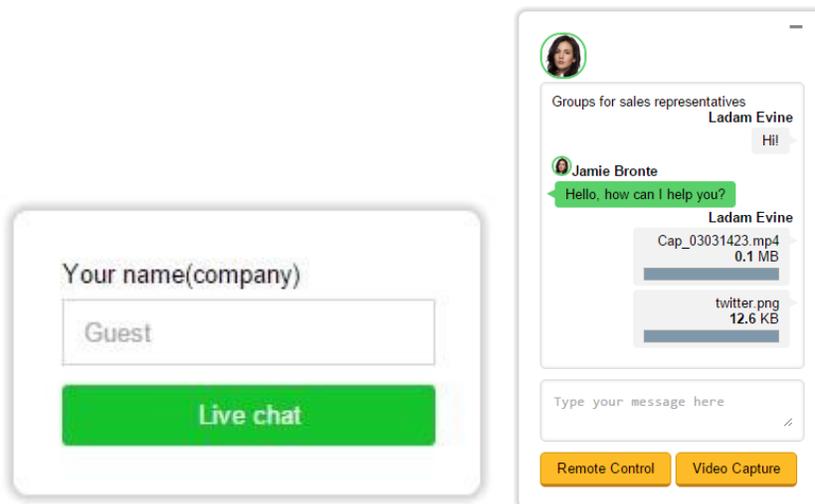
[Modify Live Chat staff](#) [Cancel](#)

[Customer] Access Chat

Go back to Messenger > Live Chat group list, and click the button “Link URL”, next to the delete button. The address inside the HTML <a> tag will allow Customers to access your Live Chat system. Implement the URL to your Website and wait for Customers to initiate.



When a Customer accesses the system via URL, they must input a guest name that will appear as their name in records and Moffice Talk messenger. Afterwards, they'll be able to chat normally with your available Reps or leave a message if no one is available. Dragging and dropping a file into the conversion window will also send images, documents, etc. Customers can also request Remote Control so the Rep can take control of their computers for technical help. They can likewise click “Video Capture” to make a video of what is happening on their screen and send it to the Rep.

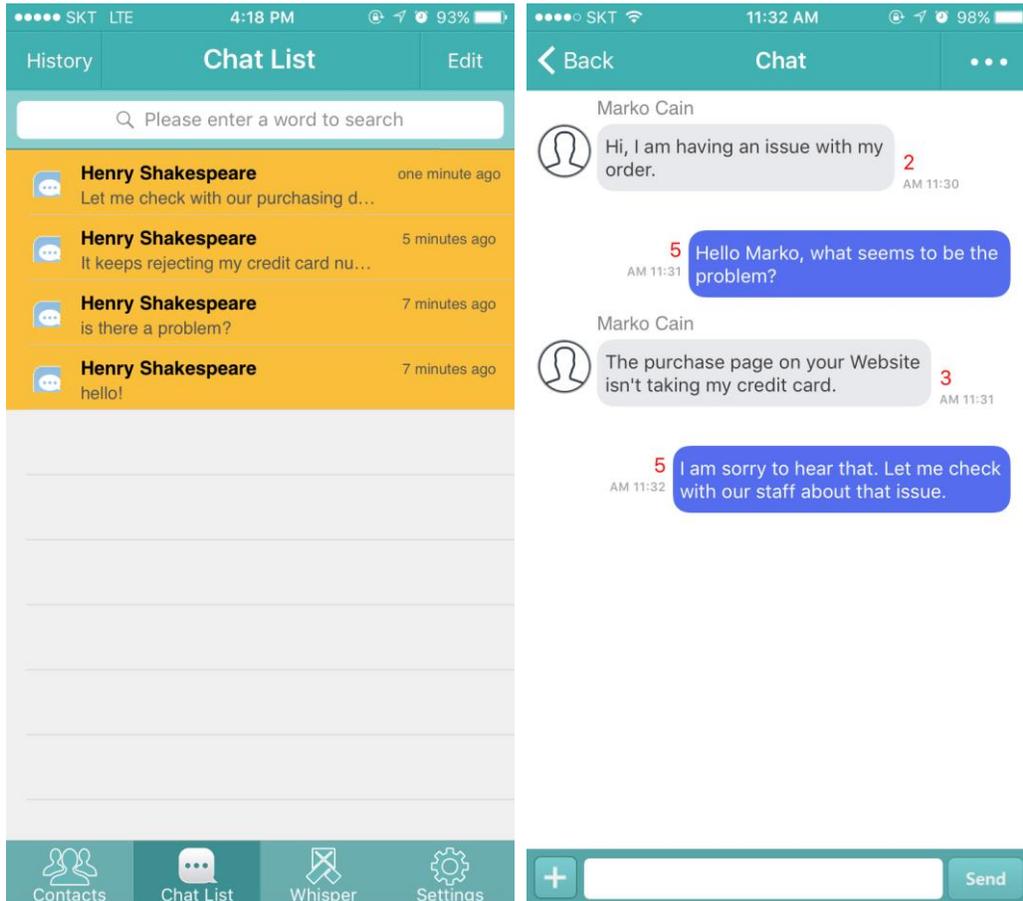


[Rep] Respond via Talk

Reps can reply to Customers via Moffice Talk on PC or mobile.

Whether on PC or mobile, Reps will be able to chat real-time, as well as view and send files.

Reps can only engage in Remote Control (temporarily controlling the desktop of the initiating contact) through the desktop version of Moffice Talk.



[Rep] View Records & Connect

To view prior Live Chat records, simply log into MofficeSuite and go to Help Desk > Live Chat. You can see the list of Live Chats from Customers by date. To view conversation details, simply click the line of “content” to view more details.

The screenshot shows the 'Help Desk' sidebar on the left with 'Live Chat' selected. The main area displays a 'Live Chat' view with a search bar containing 'Content'. Below the search bar is a table of chat records:

Sender	Content	Rep	Department	Date
<input type="checkbox"/> Marko Cain	Hi, I am having an issue with my order.	Jamie Bronte	Sales Team	2016/03/03
<input type="checkbox"/> Jessica Morales	Hello?	Vivienne Angel...	Customer Se...	2016/03/02
<input type="checkbox"/> luigi	it's a me?	Vivienne Angel...	Customer Se...	2016/03/02

At the bottom of the table, it says 'Total 3' and includes pagination controls for '1 of 1'.

The screenshot shows the 'Live Chat' details view for a chat with Marko Cain. At the top, there are buttons for 'Add Ticket', 'Add Task', and 'Delete'. Below these is a table with columns for 'Customer', 'Rep', and 'Assigned Department':

Customer	Rep	Assigned Department
Marko Cain (0) Link Customer	Jamie Bronte	Sales Team

The chat history shows three messages:

- 2016/03/03 11:30:52: Marko Cain: Hi, I am having an issue with my order.
- 2016/03/03 11:31:08: Jamie Bronte: Hello Marko, what seems to be the problem?
- 2016/03/03 11:31:40: Marko Cain: The purchase page on your Website isn't taking my credit card.
- 2016/03/03 11:32:28: Jamie Bronte: I am sorry to hear that. Let me check with our staff about that issue.

If the Live Chat was sent by an existing Potential or Customer, you can link the contact through the “Link Customer” button. Simply find the contact and the Live Chat record will connect to their Activity History.

This screenshot shows the 'Live Chat' details view for a chat with 'McJohanssen's Used Cars (Marko Cain)'. The table at the top has columns for 'Customer', 'Rep', and 'Assigned Department':

Customer	Rep	Assigned Department
McJohanssen's Used Cars (Marko Cain) Unlink Customer	Jamie Bronte	Sales Team

The screenshot shows the 'All Activities' view in the system. The top navigation bar includes 'All Activities', 'Scheduled to Send', and 'Quotes'. The main area displays a table of activity records:

Subject	Owner	Date Added
Hi, I am having an issue with my order.	Marko Cain	2016/03/03 11:33

At the bottom, it says 'Total 1' and includes pagination controls for '1 of 1'.

[Manager] Check Analyses

Accumulated Live Chat statistics can also be viewed in Help Desk > Dashboard > Live Chat Analysis. Here, you can see the number of Live Chats per selected time period, the Reps who replied most frequently, and the average response time per chat. Use these metrics to see how frequently Live Chats are utilized and when, which Reps are the most diligent to respond, and how fast your response team is.

Live Chat Analysis

2015/12/03 - 2016/03/03

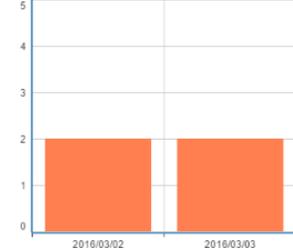
Past 3 Months

Daily

Draw Chart

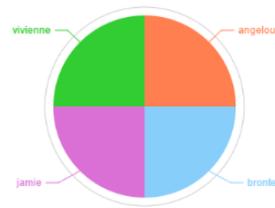
Live Chats by Time Period

Live Chats by Time Period



Reps who Replied Most on Live Chat

angelou
bronte
jamie
vivienne



Live Chat Average Response Time

Duration (hour)

