Chat

Here you can configure various properties related to 2 different areas:

- Allocation of chat and other written requests in combination with phone calls

- Chat properties

The properties related to allocation of chat and written requests:

- **Allow to adjust max concurrent written requests:** Default OFF. Set to ON if the agent should be able to adjust max concurrent written requests.

- **Block chat/social when I have email/task**: Default OFF. If you would like that an agent that already has an ongoing email/task is not allocated a chat/social request, you can turn it on. Only relevant for agents with profile containing both email and chat/social.

- **Block email/task when I have chat/social**: Default OFF. If you would like that an agent that already has an ongoing chat/social request is not allocated an email/task (but it's ok to get more chats if agent has capacity), you can turn it on. Only relevant for agents with profile containing both email and chat/social.

- **Block phone if number of chats/SoMe requests is greater than:** Default 0, which means agent will not receive an inbound call when having at least 1 chat. If set to 1 (or x), the agent can only receive an inbound call when having up to 1 (x) chats. When phone is not blocked, status is shown as *Ready (n)*, and when phone is blocked, status is shown as *Busy (n)*. The agent can make an outgoing call even if his phone is blocked for incoming calls.

- **Block phone if number of emails/tasks is greater than:** Default 0, which means agent will not receive an inbound call when having at least 1 email/task. If set to 1 (or x), the agent can only receive an inbound call when having up to 1 (x) email/task. When phone is not blocked, status is shown as *Ready (n)*, and when phone is blocked, status is shown as *Busy (n)*. The agent can make an outgoing call even if his phone is blocked for incoming calls

- **Maximum <u>total</u> concurrent written request (max 8):** Maximum number of concurrent written requests that can be allocated to the

- **Maximum total concurrent written requests (max 8) -<u>adjusted</u>:** Default 0 (=not defined) on company level. If agents are allowed to adjust, the current value for each agent is shown here. A defined value on company or user group level will be used for agents that have not yet changed the value for Max total concurrent written requests in the agent application.

- **Maximum concurrent <u>chat/social</u> requests:** Default = 0 = not defined, which means that the value for Max total concurrent written requests is used. If agents are allowed to adjust the max number of concurrent written requests, the current value for each agent (user) is shown here. A defined value on company or user group level will only be used for agents that have not yet changed the value in the agent application.

- **Maximum concurrent <u>email/etask</u> requests:** Default 1. If agents are allowed to adjust the max number of concurrent written requests, the current value for each agent (user) is shown here. A defined value on a company or user group level will only be used for agents that have not yet changed the value in the agent application.

See also [Details about agent statuses](#).

Chat related properties

- **Allow to send attachments:** Default OFF. Turn ON if the agents should be able to send attachment to the customer in the chat. If an agent uploads a file that customer could download, this file is temporarily stored, so the link shown in the chat transcript sent by email and shown in Archive will only work for a short time.

- **Automatic welcome message when agent accepts:** The text defined here will be presented for the chatter when the agent accepts the chat. System variables like $agentFirstName and $agentFullName can be used. Example: *Hi! You are chatting with $agentFirstName. How can I help you?*

- **Automatic goodbye message when agent disconnects chat**: If a message is configured here, this message will be

shown for the chatter just after the agent disconnects, but only if the chatter has not yet ended the chat. If the agent tries to close a chat dialog tab in the Agent application before the chatter has ended, the agent gets a warning (*The person you are chatting with is still connected. Are you sure you want to close?*)
Example text:
Thanks for your request, and have a great day! Best regards $agentFirstName. [br][br]You can also find answers to frequently asked questions on
[url]https://help.puzzel.com/[/url]

- **Automatic welcome-message when chat is transferred from a bot:** Default OFF. When this property is set to ON the defined automatic welcome message when an Agent accepts a chat will be sent even when the chat has first been handled by a bot.

- **Avatar URL**: Where avatars (if any) are stored. The avatar classic proportion ratio is 1:1 (square). Recommended size is 40x40, 60x60 or 80x80 pixels. Popular formats are GIF, JPG, PNG.

- **Pin chat intro field (if available)**: If ON, the initial text from the chatter (name etc) is pinned in the upper part of the chat. Each agent can turn on/off Pin chat intro message, and the current choice is shown here.

- **Enable Chat Survey:** If chat survey is configured on your web page, the survey is active only if this property is ON

- **Use chat nickname instead of queue name in tab header:** You can configure what your agents see as Dialog tab header on the chat tabs in the Agent application. They can see from what queue the chat is coming (e.g. Chat sales) or the name of the chatter (e.g. David). If agents can answer more than one chat at a time, we recommend showing nickname. If agents can answer only one chat at a time and they answer several chat queues, showing queue name might be useful.

- **Chat nickname:** Chat nickname is a nickname for the agent. If its not defined, the agents Firstname and Lastname is shown to the chatter. Chat nickname is useful if you do not wish to display the full identity of your agents. The defined agent nickname is presented to the chat customer. You can define the same nickname for all agents in a user group, or you can use the variable $agentFirstName if you want to display the agents real first name for your chat customers.

- **How long (seconds) before a chat tab indicates that a new chat message is not handled:** If an agent is responding to various chats at the same time he/she will have several chat tabs open. Every time a chatter in a non-active tab sends a new a message, the agent will be notified in the chat tab. You can configure that the chat tab will start blinking if the agent has not read the message within X seconds.

- **How long (seconds) before a chat tab should give alarm when there is no activity from chatter:** If the chatter has not written anything for X seconds you can configure that the agent will be notified in the chat tab header ("?" will appear in the right part of the tab header).

- **Offer chat to agent sec:** You can configure for how long agents should be offered a chat. Default is 30 seconds. If the agent does not accept the chat within these seconds, the chat request will be offered to another agent. An agent that does not accept an offered chat will not receive a new chat before the No answer timeout is over, or before status is changed from No answer to Ready.

  - Please note that if an agent leaves without clicking 'Logoff', the queue will allocate a chat to this ready agent, but since the agent's Puzzel browser is closed/unavailable, the agent's status does not change to alerting (aka connecting/ringing), so instead of 'ringing' (=being offered) for 30 sec, this chat stays allocated to the agent for 130 sec before the queue tries another agent.

  - If chat agents forget to log off, we recommend turning on 'Automatic logoff after 5 errors for written requests' See Users - Products - Logon to queue

- **Information to customer - $text01 (-20):** Here you can define one or more variable texts that could be used in the web form for customers wanting to start a chat with your agents. See more details in the document describing the Puzzel Chat form.

- **Insert text 1 (-40):** The 40 Insert text box fields are used for *Predefined messages* for your agents that will appear in your agents' chat window. To create a predefined message, simply write it in one of the *Insert text boxes*. The format is Title;Message.
The Title is the word(s) appearing in the predefined message popup window in the Agent application, and the Message will appear in the chat when the agent selects one of the Titles.

To add a hyperlink into a predefined text box simply use this format: link name.
Examples:

- Product Page;Please check out our Product Page

- Good bye;Thanks for your request. Have a nice day!

- **Enable captcha on chat**: Captcha can be configured on request. (Only Puzzel support can see this property). If captcha is turned on, the user wanting to start a chat needs to prove he/she is human. Puzzel generates a random number (a validation code) and presents it on the web-page, and the user must enter the number into an input field before a chat can be started.

- **View chatters browser activity in Dialogs**: If your company's web page that offers Puzzel chat is configured to track users browsing history, this history will be shown for the agent in the chat tab.

- **SMTP Alternative host for sending Chat log:** When a chat ends, the end customer can ask that the chat log is sent to his email address. The chat log is then sent from Puzzel's email server. If you want this email to be sent from your own SMTP server instead, you can register the alternative SMTP hosts **server name, username, password and a from address,** so that Puzzel can use this SMTP host, and then turn on Use alt. SMTP host for sending Chat log. Please note that if you choose to do this, the chat log is transferred from Puzzel's web server to your SMTP host using TLS just after each chat ends, but it only works when your host is available.

> **Note**
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> NB! Microsoft are deprecation basic authentication in Exchange Online October 1st 2022. This means that this option will probably not be supported in the future, and you may not get it to work. However, Microsoft states at the same time that they will support SMTP auth if it is being used:
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> *SMTP AUTH will still be available when Basic authentication is permanently disabled on October 1, 2022. The reason SMTP will still be available is that many multi-function devices such as printers and scanners can't be updated to use modern authentication.*
>
> Read more about this here: Deprecation of Basic authentication in Exchange Online

Please see more about chat configuration on this page: Services - Chat