DIALOX - SOCIAL MESSAGING

User Documentation

As of: June 2023

CONTENTS

1 INTRODUCTION

The DialoX - Social Messaging Platform allows you to manage conversations via the messaging apps your customers already use on a daily basis (Whatsapp, etc.) and offer support with human agents or chatbots (virtual agents) through these apps. Thanks to asynchronous messaging, customers can get in touch with you anytime, anywhere (even outside business hours).

DialoX - Social Messaging supports various messaging channels. This manual describes how to set up and use bots on the DialoX - Social Messaging platform.

2 LOGIN AND LOGOUT

As a new user, you receive an invitation via email with a link to the DialoX - Social Messaging login page. There you can register or log in with an existing account.

2.1 REGISTER

By clicking on the link in the invitation, you will be redirected to the registration page where you can register.

To register on DialoX - Social Messaging

1. Click on the link you received in the invitation email.
   ✓ The login page appears.
2. Click **Sign up**.
3. Enter your user name under **Your name**.
4. Enter your email address under **E-mail address**.
5. Set a secure password in the **Password** field.

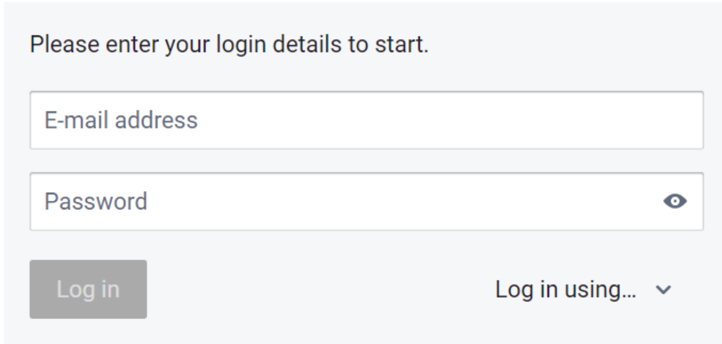
> The password muss have at least 8 characters and contain at least a capital letter, a special character and a number.

6. Read the End User License Agreement and accept it by selecting the check box.
7. Click **Sign up**.
   ✓ You are registered and the home page of the environment where you were invited appears.
   ✓ You can see the created bots or the **Create your first bot** button if the environment is still empty.

2.2 LOG IN

To log in to DialoX - Social Messaging

1. Enter the address of the DialoX - Social Messaging platform in your web browser and press **Enter**.
   ✓ The login page appears.



2. Enter your email address and password and click **Log in**.
   ✓ You are logged in and the home page of the environment appears.

2.3 LOG IN WITH OTHER ACCOUNTS

You have the possibility to log in to DialoX - Social Messaging using the following accounts:

- Microsoft account
- Google account
- Facebook account
- Operator account

> If you log in to DialoX - Social Messaging the first time with **Microsoft**, **Google**, **Facebook** or **Operator** without registering first (i.e. filling out the sign-up form), you must always use the same login option.

To log in with other accounts

1. Click **Log in using** on the login page.
   ✓ A drop-down list opens with the following services: **Microsoft**, **Google**, **Facebook** and **Operator**.
2. Select the desired option.
   ✓ You will be redirected to the corresponding registration page.
3. Enter your credentials and follow the instructions of the respective service.
   ✓ Once you have logged in, the start page of the environment appears.

More options on the login page

There are other options available on the login page.

Redeem invite

You can redeem an invitation you received by email. This is a way of verifying the email address you provided.

To redeem an invite

1. Click **Redeem invite** on the login page.
   ✓ An input field opens.
2. Enter the code you received via email.
3. Click **Check**.
   ✓ Your email address is verified and the start page of the environment appears.

Reset password

You can reset your password if you have forgetten it.

To reset your password

1. Click **Reset password** on the login page.
2. Enter your email address under **E-mail address**.
3. Click **Reset**.
   ✓ You will receive an email with information on how to reset your password.

Privacy policy

By clicking on **Privacy policy** you will be redirected to the page with the privacy policy for DialoX - Social Messaging.

EULA

By clicking on **EULA** you will be redirected to the page with the End User License Agreement for DialoX - Social Messaging.

2.4 LOG OUT

To log out from DialoX - Social Messaging

1. Click on your name in the title bar.
2. Click **Log out**.
   ✓ A pop-up window in which you have to confirm the operation opens.
3. Click **OK**.
   ✓ You are logged out from DialoX - Social Messaging.

3 USER INTERFACE

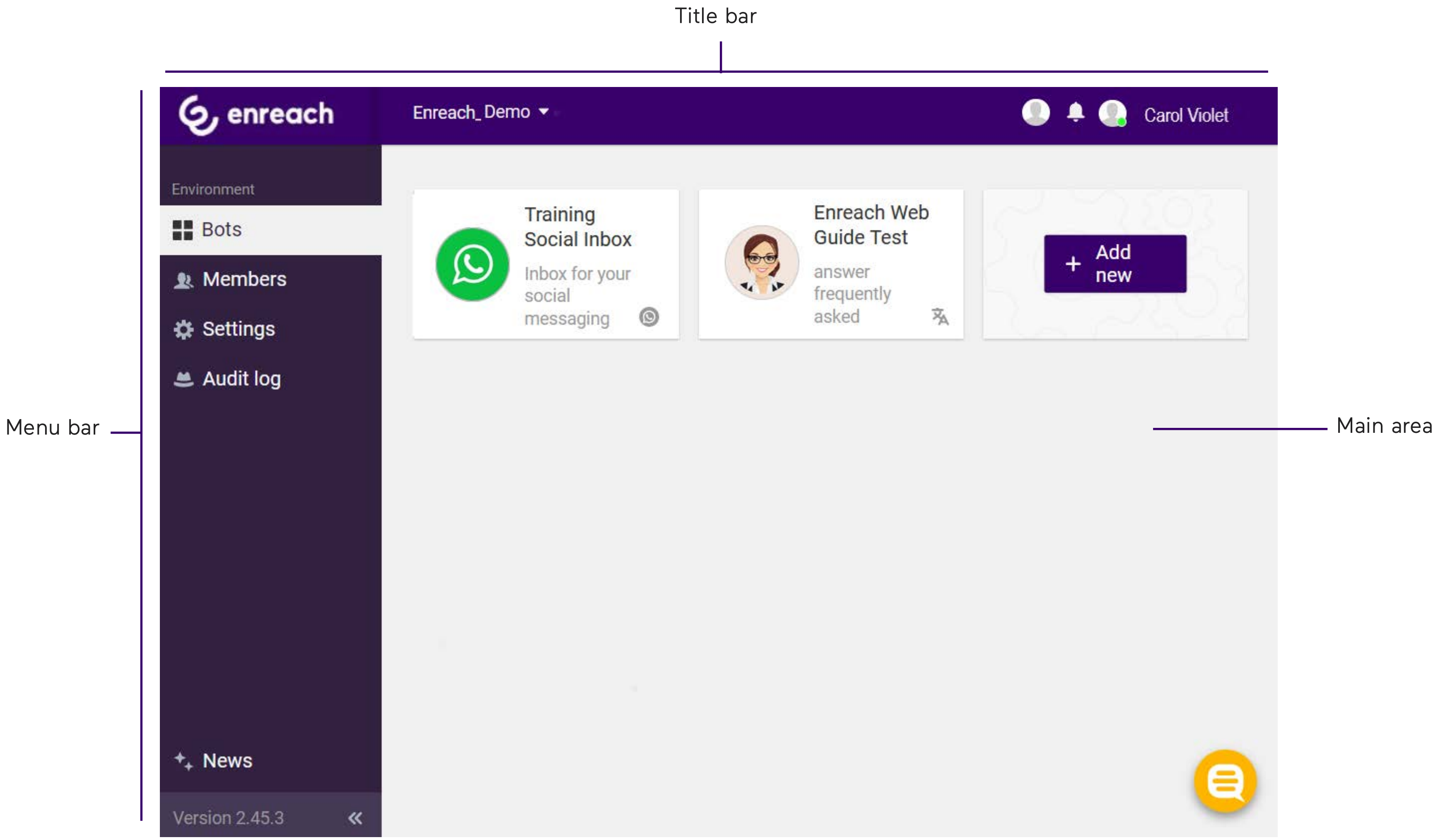


Abb. 3-1: User interface

Profile
Notifications panel
Environments
User
Audit Log

The user interface of DialoX - Social Messaging is divided into three areas: the title bar, the menu bar and the main area.

Title bar

Your name and user picture, the currently selected environment, the selected bot, and the logged-on users are displayed in the title bar.

On the left side, the name of the currently selected environment is displayed right next to the logo of your organisation. With a click on the drop-down menu next to the environment name, you can access the different environments and bots.

By clicking on your name, you can access your profile information, status selection and the logout option.

Menu bar

> The items displayed on the menu bar are profile-related, i.e. they can be different for each user depending on their role and permissions.

The menu bar gives you access to settings and information for an environment or bot.

You can use the arrow buttons to show or hide the menu.

Button	Explanation
	Show menu subitems
	Hide menu subitems

Button	Explanation
	Show menu bar
	Hide menu bar

Under **News** you can find information about the latest update of DialoX - Social Messaging. By clicking **Go to news feed** you can get information about previous versions of the platform.

The last and currently used version of DialoX - Social Messaging is displayed at the bottom of the menu bar. Clicking on the version number opens the **Change log**, with a listing of changes made to the software, e.g. bug fixes, new functions.

Under **Help** you can access the online help of DialoX - Social Messaging.

Main area

After logging in, all the created bots will be displayed.

In this area, the contents of the items selected in the menu bar and title bar are displayed. You can read and edit all information here.

3.1 PROFILE

By clicking on your name, you can access your profile information, status selection.

Status
Settings
Security
Notifications

3.1.1 STATUS

Under **Operator Status** you can set your status. This allows you to change your availability within the configured office hours.

A green dot on the profile picture indicates that a user is available.

To set your status

1 Click on your name in the title bar.
2 Select a status:

Status	Explanation
	You have selected the status **Available for chat**. You are available for chats.
	You have selected the status **Invisible (Assign only)**. You are not visible, but conversations can be assigned to you.
	You have selected the status **Unavailable**. You are not available because you are in a meeting, for example.

✓ The selected status is immediately applied and is visible on your profile picture.

3.1.2 SETTINGS

Under **Settings** you can edit your user information and set a profile picture.

To edit your profile

1 Click on your name in the title bar.
2 Click on **Profile**.
✓ The profile page opens.
3 Edit the following user information:

Setting	Explanation
Full name	Enter your first and last name.
Alias	Enter an alias/pseudonym. This is displayed in the inbox when you are communicating to others.
Email	Enter an email address.
Phone number	Select the country from the drop-down list and enter a mobile phone number.
Time zone	Select your time zone from the drop-down list.
Office hours	Set your office hours. You will not be notified outside of these times.

4 Click on Save.
✓ The changes are saved.

To set a profile picture

1 Click on your name in the title bar.
2 Click on **Profile**.
✓ The profile page opens.
3 Click on to set or change a profile picture.
4 Choose one of the two options.

Option	Explanation
Upload from computer	**Upload an image from your computer** Select the desired image from your local storage and click **Open**.
Enter an URL	**Upload an image from an online storage/cloud** Enter the URL of the image you want to use as profile picture and click **OK**.

5 Click **Save** to apply the changes.
✓ The profile picture is saved and immediately displayed.

To remove your profile picture

1 Click on your name in the title bar.
2 Click on **Profile**.
✓ The profile page opens.
3 Click on your profile picture.
4 Click **Remove.**
5 Click **Save** to apply the changes.
✓ The profile picture is removed.

3.1.3 SECURITY

Under **Security** you can change your password and enable the Multi-Factor Authentication (MFA).

To change your password

1 Click on your name in the title bar.
2 Click on **Profile**.
✓ The profile page opens.
3 Click on **Security**.
✓ The **Security settings** page opens.
4 Click **Change Password**.
5 Enter the current and the new password in the corresponding fields.
6 Click on **Save**.
✓ The password is changed.

The password muss have at least 8 characters and contain at least a capital letter, a special character and a number.

You cannot change your password here if you log in with Microsoft, Google, Facebook or Operator.

To enable the Multi-Factor Authentication

1 Click on your name in the title bar.
2 Click on **Profile**.
✓ The profile page opens.
3 Click on **Security**.
✓ The **Security settings** page opens.
4 Click **Multi-factor authentication (MFA)**.
5 Click **Enable MFA**.

You must have an authentication app installed on your device.

6 Scan the QR code and follow the instructions to link the authentication app to your account and generate a code for the Multi-Factor Authentication.
7 Enter the generated confirmation code.
8 Click **Enable MFA**.
✓ The Multi-Factor Authentication is enabled.

3.1.4 NOTIFICATIONS

Under **Notifications** you can configure the settings for push and email notifications for new activities on DialoX - Social Messaging.

3.1.4.1 PUSH NOTIFICATIONS IN THE BROWSER

You can display new notifications as a popup on your browser. Push notifications take into account your working hours or the selected status.

Push notifications can be displayed in all common browsers.

To enable push notifications

1. Click on your name in the title bar.
2. Click on **Profile**.
   ✓ The profile page opens.
3. Click on **Notifications**.
   ✓ The **Notifications** page opens.
4. Click **Enable**.
   ✓ Depending on your browser and operating system settings, a pop-up window may open where you have to grant permissions.
5. Click **Allow**.
   ✓ The push notifications are enabled.

> The **Enable** button is only visible when you enable push notifications for the first time.
> If you want to deactivate them and want to reactivate them later, you have to click on the lock symbol to the left of the URL in your browser. You can then toggle the slider for notifications, or you can open the browser settings and/or the permissions for the website and set the permissions for notifications.

To disable push notifications

1. Click the lock icon to the left of the URL in your browser.
   ✓ Depending on the browser, a pop-up window opens with several options.
2. Disable the slider or reset the notification permissions for the web page.

or

2. Open the browser settings and/or permissions for the website and set the permissions for notifications.
3. Reload the page to apply the settings to the web page.
   ✓ The push notifications are disabled.

3.1.4.2 NOTIFICATIONS SETTINGS

You can configure the settings for notifications about new activities in the Studio Inbox. Push notifications take into account your working hours or the selected status. Emails are also sent outside your configured working hours. Disabled notification categories(**Inbox** or **Inbox mention**) are not displayed in the feed on the notification panel.

To configure the notifications settings

1. Click on your name in the title bar.
2. Click on **Profile**.
   ✓ The profile page opens.
3. Click on **Notifications**.
   ✓ The **Notifications** page opens.
4. Set the following options:

Option	Explanation
Inbox	Events in the Inbox Enable the slider if you want to receive notifications about all Studio Inbox events (new conversations, new messages, conversations assigned to you, etc.). • **Push**: You will receive new notifications as a popup on your browser. • **E-mail**: You will receive new notifications via e-mail.

Option	Explanation
Inbox mention	**A colleague mentions you in the team chat.** Enable the slider if you want to receive notifications for the team chat. • **Push**: You will receive new notifications as a popup on your browser. • **E-mail**: You will receive new notifications via e-mail.

or

1 Click in the title bar on .
✓ The notifications panel opens.

2 Click on .
✓ The **Notifications** page opens and you can define your settings for notifications.

3.2 NOTIFICATIONS PANEL

When you receive notifications, they are displayed in the notifications panel. There you can also set your preferences and manage notifications.

A red dot on the notification icon indicates that you have unread notifications. Clicking on a notification opens it in the respective inbox.

To open the notification panel

1 Click in the title bar on .
✓ A pop-up window will open with all received notifications and the following options:

Option	Explanation
	Set settings for notifications Click the icon to configure the settings for notifications, see **3.1.4.2 Notifications settings**, page 11.
	Turn on notifications Click the icon to change this setting. The icon changes to and the notifications in the notification panel are turned off.
	Show unread notifications only Click the icon to change this setting. The icon changes to and all notifications in the notification panel are displayed.
✓ Mark all read	**Mark all notifications as "read"** Click the button to mark all notifications as "read". This action cannot be undone.

By default, only new or unread notifications are displayed when you open the notifications panel. If you have no unread notifications, the **You're all caught up** notice will show under the icons. You can click or to switch between read and unread notifications.

Notifications are displayed in the notification panel with the date and time and the bot to which the notification is referring. The icon indicates the type of notification.

Icon	Explanation
	Escalation, new message or assignment
@	Mention in team chat

To manage notifications

1. Click in the title bar on .
   ✓ The notifications panel opens.
2. Click if no notifications are displayed.
   ✓ All notifications are displayed.
3. Click on the desired notification. You have the following options depending on the status.

Icon	Explanation
	The notification is unread. Click the icon to mark the notification as "read".
	The notification was read. Click the icon to mark the notification as "unread".
	Delete notification Click the icon to delete the notification.

3.3 ENVIRONMENTS

After logging in, you can view all the environments you are registered on and see all the created bots and all the users of an environment.

You can also change the settings and view the last activities of the environment.

To manage an environment, you must have the role **Environment manager**.

To select an environment

1. Click on the drop-down menu next to the logo of your organisation.
   ✓ All environments in which you are registered are displayed.
2. Click on the desired environment.
   ✓ The environment opens and the created bots are displayed.

3.3.1 BOTS

All bots created in an environment are displayed under **Bots**.

By clicking on a bot, you access the dashboard where you can use and manage the bot.

To create a bot

1. Click **Create your first bot** if the environment is still empty.

or

1. Click on + Add new .
   ✓ A pop-up window opens where you can select a template for the bot.
2. Select a template for the bot, e.g. **Social Messaging Inbox**.
3. Enter a name for the bot.
4. Select the language(s).
5. Click **Create bot**.
   ✓ The bot is created.

For more information on creating and using bots, see 4 Bots, page 20.

3.3.2 SETTINGS

Under **Settings** you can manage the environments and define or edit settings.

To change the settings for an environment

1. Click on the drop-down menu next to the logo of your organisation and select the desired environment.
2. Click **Settings** in the menu bar.
   ✓ The page **Environment settings** appears.
3. Click on Settings .
   ✓ A pop-up window opens.
4. You can change the following settings:

Setting	Explanation
Display name	Enter a new name for the environment here.
Organization domain name(s)	Enter a domain name. Users are automatically added as a member of the environment when they log in with an email address from the listed domains.
Select… (role)	Select the roles that will automatically be assigned to newly added members.

5. Click on Save .
   ✓ The changes are saved.

To move an environment to another organisation

1. Click on the drop-down menu next to the logo of your organisation and select the desired environment.
2. Click **Settings** in the menu bar.
   ✓ The page **Environment settings** appears.
3. Click **Move environment**.
   ✓ A pop-up window opens.
4. From the drop-down list under **Move to agency**, select the organisation you want to move the environment to.
5. Click **Move**.
   ✓ The environment is moved.

To delete a environment

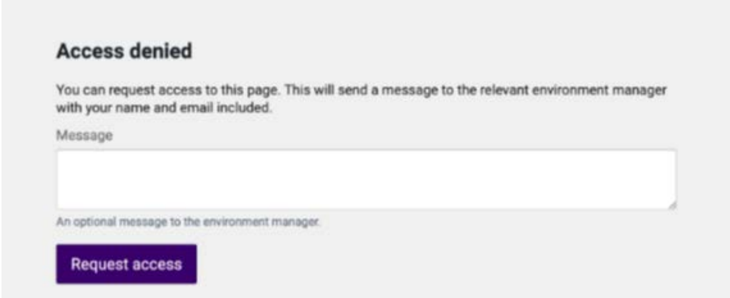
To be able to delete an environment, you must first remove all created bots.

Please note that you will be logged out of DialoX - Social Messaging if the environment you are deleting is the only one you are registered in.

1. Click on the drop-down menu next to the logo of your organisation and select the desired environment.
2. If necessary, delete the created bots (see To delete a Bot, page 27).
3. Click **Settings** in the menu bar.
   ✓ The page **Environment settings** appears.
4. Click **Remove Environment**.
   ✓ A pop-up window in which you have to confirm the operation opens.
5. Click **OK**.
   ✓ The environment is deleted.

3.3.3 ACCESS REQUESTS

Under **Access requests**, all requests sent by people who want access to an environment are displayed. Users with the **Environment manager** role receive an email notification when access to the environment is requested.



To display access requests

To accept an access request

To reject an access request

To display access requests

1 Click on the drop-down menu next to the logo of your organisation and select the desired environment.

2 Click **Access requests** in the menu bar.
✓ The **Access requests** page opens and all access requests for the selected environment are displayed.

Designation	Explanation
Status	Status of the access request
Requestor	Name of the user who made the access request
Email	E-mail address of the user who made the access request
Environment	Name of the environment for which access is requested
Requested at	Date and time when the access request was made

Only users with the **Environment manager** role can see and process access requests.

To accept an access request

1 Click on the drop-down menu next to the logo of your organisation and select the desired environment.

2 Click **Access requests** in the menu bar.
✓ The **Access requests** page opens and all access requests for the selected environment are displayed.

3 Click on the desired access request.
✓ The **Request** tab opens, where you can process the access request.

4 In the drop-down list under **Select roles**, select the role(s) you want to assign to the user in the environment.

5 Click **Accept with roles**.
✓ The access request is accepted and the user receives an email notification.
✓ The status of the request changes from **New** to **Accepted**.

To reject an access request

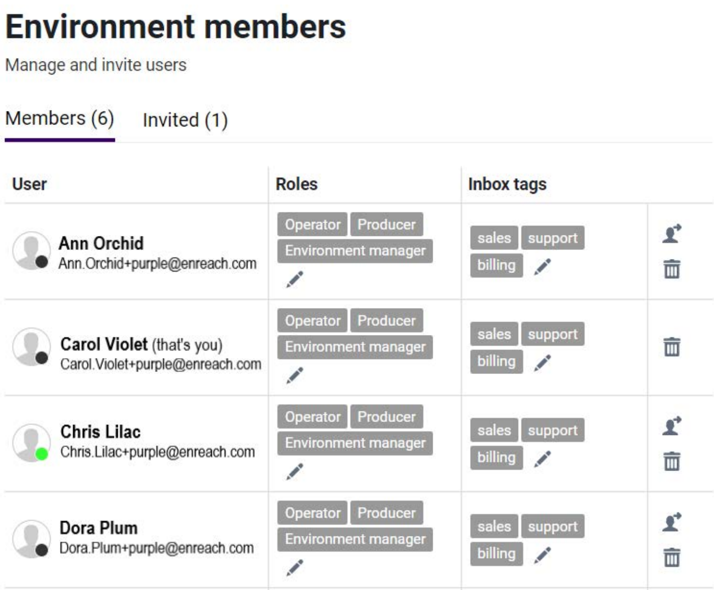
1 Click on the drop-down menu next to the logo of your organisation and select the desired environment.

2 Click **Access requests** in the menu bar.
✓ The **Access requests** page opens and all access requests for the selected environment are displayed.

3 Click on the desired access request.
✓ The **Request** tab opens, where you can process the access request.

4 Click **Reject**.
✓ The access request is rejected and the user receives an email notification.
✓ The status of the request changes from **New** to **Denied**.

3.4 USER



Inviting users

Overview of the roles

Managing users

To display the users of an environment

1 Click on the drop-down menu next to the logo of your organisation and select the desired environment.

2 Click **Members** in the menu bar.
✓ The **Environment member** page appears and all users in the environment are displayed.

or

1 Click on the name of the currently used bot in the title bar.

2 In the pop-up window, click **Manage environment**.
✓ The Environment page opens.

3 Click **Members** in the menu bar.
✓ The **Environment member** page opens and all users in the environment are displayed.

Search users

The field for the user search is above the user list.

You can enter a first or last name here to search for a user.

With each character you enter, the results are automatically updated and grouped semantically.

3.4.1 INVITING USERS

Users can be invited by your service provider or by other users with the **Environment Manager** role.

Under the **Invited** tab above the user list you can manage the invitations sent.

To invite a user

1 Click **Members** in the menu bar.
✓ The Environment member page appears and all users in the environment are displayed.

2 Click **Invite user** below the list of users.

3 Enter the email address of the person you want to invite.

4 Select a role for the user (for information about the different roles, see 3.4.2 Overview of the roles, page 16).

5 Click on 
.

✓ The user receives an email with a link to the DialoX - Social Messaging login page.
✓ You receive a confirmation email when the user accepts the invitation.

3.4.2 OVERVIEW OF THE ROLES

When you invite users to an environment, you need to assign them a role based on their tasks. Users can be assigned one or more roles. The roles apply only to the specific environment, so a user can have different roles in different environments. However, roles assigned to a user at the organisation level apply to all the environments of that organisation unless specifically overridden for a particular environment.

To be able to reply to incoming messages, the user must at least have the Agent or Operator role.

To be notified about incoming messages, you need to have the Agent or Operator role assigned in the environment your bot is in.

Following roles can be assigned to a user:

Role	Description
Agent	Reply to conversations in the inbox
Analyst	View platform analytics data
Content manager	Manage content on the platform
Developer	Development of the bot, training and skill management
Environment manager	Manage an environment and its users
Operator	Reply to conversations in the inbox, start new conversations and view all contacts
Producer	Manage content, contacts, and analytics data

3.4.3 MANAGING USERS

Under **Environment members** you can manage the users. You can remove users or temporarily take over their roles for testing purposes, edit roles and inbox tags.

To remove a user

To "impersonate" another user

To edit the inbox tags

To remove a user

1. Click on the drop-down menu next to the logo of your organisation and select the desired environment.
2. Click on **Members**.
   ✓ The list of users is displayed.
3. Click in the line of the desired users.
   ✓ The user is removed from the environment.

To "impersonate" another user

1. Click on the drop-down menu next to the logo of your organisation and select the desired environment.
2. Click on **Members**.
   ✓ The list of users is displayed.
3. Click in the line of the desired users.
   ✓ A pop-up window in which you have to confirm the operation opens.
4. Click **OK**.
   ✓ A hint in the title bar indicates that you are currently "impersonating" another user.

   ✓ The view of DialoX - Social Messaging that the selected user has with their assigned roles is displayed.
5. Click the hint to undo the operation.
   ✓ A pop-up window in which you have to confirm the operation opens.
6. Click **OK**.
   ✓ The "impersonation" ends and you are redirected to your own account.

To edit the inbox tags

1 Click on the drop-down menu next to the logo of your organisation and select the desired environment.

2 Click on **Members**.

The list of users is displayed.

3 Under Inbox Tags, click ✎ in the line of the desired users.

4 Click **Select** to add tags from the drop-down list.

or

4 Click on an existing tag to remove it.

5 Click on ✓ .

✓ The changes are saved.

For the creation of inbox tags, see 4.2.3 Tags, page 21.

3.5 AUDIT LOG

The last activities of an environment are displayed under **Audit Log**.

To view the audit log

1 Click on the drop-down menu next to the logo of your organisation and select the desired environment.

2 Click **Audit Log** in the menu bar.

✓ The **Audit Log** page appears and you can view the last activities of the selected environment.

4 BOTS

All bots in an environment are displayed under **Bots**. Here you can create and manage your bots, configure the settings.

By clicking on a bot, you access the dashboard where you can use and manage the bot.

> The items displayed on the menu bar are profile-related, i.e. they can be different for each user depending on their role and permissions in the environment.

4.1 CREATING BOTS

After logging in, you can see an overview of the bots in the environment you have been invited to. If you don't have a bot yet, you can create your first bot.

To create the first bot

1 Click **Create your first bot**.
✓ A pop-up window opens where you can select a template for the bot.

2 Click **Social messaging inbox**.
✓ A pop-up window with input fields opens.

3 Enter a name for the bot under **Name**.

4 Select under **Languages** the languages that will be supported by the bot. For some languages, such as Dutch, you can choose between formal and informal address.

5 Click **Create bot**.
✓ The bot is created.

To add a bot

1 Click on **+ Add new**.
✓ A pop-up window with defined templates opens.

2 Select a template for the bot.

3 Enter a name for the bot.

4 Select the language(s).

5 Click **Create bot**.
✓ The bot is created.

To display the bots of an environment

1 Click on the drop-down menu next to the logo of your organisation and select the desired environment.

2 Click **Members** in the menu bar.
✓ The environment page appears and all created bots are displayed.

or

1 Click on the name of the currently used bot in the title bar.

2 In the pop-up window, click **Manage environment**.
✓ The environment page appears and all created bots are displayed.

To select a bot

1 Click on the drop-down menu next to the logo of your organisation and select the desired environment.
✓ The environment opens and the created bots are displayed.

2 Click on the bot you want to use.
✓ The dashboard opens and you can use the bot or edit the settings.

To mark a bot as a favorite

1 Click on the drop-down menu next to the logo of your organisation and select the desired environment.
✓ The environment opens and the created bots are displayed.

2 Hover over the desired bot and click on ☆ .
✓ The bot is marked as a favorite and pinned above the other bots.

3 Click ★ to remove the bot from the favorites.

4.2 SETTINGS

After creating a bot, you can configure and edit various settings under **Settings**.

Identity settings

Opening hours

Tags

Auto responses

View and reset changes

4.2.1 IDENTITY SETTINGS

Under **Identity** you can set the name, language and time zone of your bot.

To configure the identity of the bot

1 Click **Settings** in the menu bar.
2 Click **Identity** to open the **Bot Identity** page.
3 Click on the logo and select an image from your computer or online storage if you want to change the image.
4 Enter the name of your company under the logo.
5 Click in the **Languages** field to add or change languages. Repeat this process for all languages you want your bot to support.
6 Select the time zone that will apply to the bot.
7 Enter the URL in the **Privacy Policy URL** field if your organisation has a privacy policy page.

8 Click on **Save**. You may need to scroll first to find the button.

9 Click on **Publish**.

4.2.2 OPENING HOURS

Under **Opening Hours** you can set the opening hours of the bot.

To set the opening hours of the bot

1 Click **Settings** in the menu bar.
2 Click on **Opening Hours**.
3 Enable or disable a day using the sliders.
4 Enter opening and closing times in the time fields for the selected days.

5 Click on **Save**.
✓ The settings are saved.

4.2.3 TAGS

Under **Tags** you have the possibility to set tag groups to create multiple inboxes and to structure conversations.

To add a tag group

To delete a tag group

To add a tag

To delete a tag

To add a tag group

1 Click **Settings** in the menu bar.
2 Click **Tags**.
3 Click **Add tag group**.
✓ A pop-up window where you can configure the tag opens.
4 Configure the following settings.

Setting	Explanation
Label	Enter a name for the tag group. This is displayed on the user interface.
Identifier	Enter a name that will be used by the program as a designation name for the tag group. The identifier does not appear on the user interface.
Tag type	Select a type for the tag group from the drop-down list: • Single • Multiple • Bare
Show in tag analytics	Enable the slider to display the tag group under **Analytics**
Show in inbox sidebar	Enable the slider to display the tag group in the Inbox sidebar
Show as funnel on dashboard	Enable the slider to display the tag group as a curve diagram on the dashboard
Show as KPI on dashboard	Enable the slider to display the tag group as a KPI on the dashboard
Tags	All tags of the tag group are displayed here.

5 Click **Add tag** to add more tags in the tag group.
6 Click on **Save**.
✓ The tag group is added.
7 Click on **Publish** to enable the settings.

To delete a tag group

1 Click **Settings** in the menu bar.
2 Click **Tags**.
3 Hover over the tag group you want to delete and click on .
✓ The tag group is deleted.
4 Click **Save** to save the changes.
5 Click on **Publish** to enable the settings.

To add a tag

1 Click **Settings** in the menu bar.
2 Click **Tags**.
3 Click the tag group you want to add the tag to.
✓ The tag group opens.
4 Click **Add tag**.
5 Enter a name for the tag in the **Label** field.
6 Click on **Save**.
✓ The tag is added.
7 Click on **Publish** to enable the settings.

To delete a tag

1 Click **Settings** in the menu bar.
2 Click **Tags**.
3 Click the tag group you want to delete a tag from.
✓ The tag group opens.

4 Hover over the tag you want to delete and click on .
✓ The tag is deleted.

5 Click Save to save the changes.

6 Click on Publish to enable the settings.

4.2.4 AUTO RESPONSES

You can configure automatic responses that will be sent when a new conversation is started. The responses can communicate the expectations for the response times.

To configure auto responses

1 Click on the desired bot.
✓ The dashboard opens.

2 Click **Content** in the menu bar.
✓ The contact list opens.

3 Click **Auto responses**.

4 Set the desired automatic responses.

Option	Explanation
When online	Enter the text that will be sent as automatic response when the company is open.
When offline	Enter the text that will be sent as automatic response when the company is closed.
When unavailable	Enter the text that will be sent as automatic response when the company is open but there are no operators available.
Wait timeout	Select the waiting time in seconds after which the system will redirect to WhatsApp.

5 Click on Save .
✓ The tag group is added.

6 Click on Publish to enable the settings.

4.2.5 VIEW AND RESET CHANGES

Before you publish settings for a bot, you can view the changes or undo them if you want to keep the last published state.

To display the changes

1 Click the drop-down menu on the **Publish** button.
✓ A pop-up window with following options opens:
- Show Changes
- Revert
- Force train

2 Click **Show Changes**.
✓ A window opens where you can view the changes.

To reset the changes

1 Click the drop-down menu on the **Publish** button.
✓ A pop-up window with following options opens:
- Show Changes
- Revert
- Force train

2 Click **Revert**.
✓ A pop-up window in which you have to confirm the operation opens.

3 Click on OK .
✓ The changes are reverted and the last published state is restored.

4.3 CHANNELS

Under **Channels**, you can configure all social messaging platforms that will be used in an environment. DialoX - Social Messaging supports various messaging channels: Web Widget, WhatsApp, Microsoft Teams, etc.

Web widget

You can set up a chat widget on your website to provide support to the visitors. The web widget can be embedded on your website so that visitors can always start a conversation with an agent by scanning the QR code or clicking the link.

WhatsApp

You can use a WhatsApp channel to allow customers to connect with your brand and communicate with you through their WhatsApp messenger app.

To use a bot with WhatsApp, you have to complete a WhatsApp Business registration with 360dialog and activate a WhatsApp channel in DialoX - Social Messaging.

Microsoft Teams

You can use Microsoft Teams to chat and provide support to customers via other social messaging channels thanks to the Enreach Virtual Agent (EVA).

To use a bot in Microsoft Teams, you have to add a channel in DialoX - Social Messaging and connect the bot to a team in Microsoft Team.

For more information on creating and using channels, see 5 Channels, page 28.

4.4 CONTACTS

⚠ When storing and processing personal data, observe the respective applicable legal data protection regulations. If you have any questions, especially about data protection in DialoX - Social Messaging, please contact your administrator.

When you receive messages, the contacts are automatically saved in DialoX - Social Messaging. You can also add contacts to the contact list yourself.

There are more options for managing your contacts at the bottom of the main area: you can import, export or merge contacts.

To add a contact

To delete a contact

To export contacts

To import contacts

To merge contacts

Contact details

To add a contact

1. Click on the bot you want to use.
   ✓ The dashboard opens.
2. Click **Contacts** in the menu bar.
   ✓ The contact list opens.
3. Click **Add contact** above the contact list.
   ✓ A pop-up window opens where you can enter the contact information.

Setting	Explanation
First name	Enter the first name of your contact.
Last name	Enter the first name of your contact.
E-mail address	Enter the email address of your contact.
Phone number	Click on the flag and select a country. Enter the phone number of your contact.
Locale	Click on the flag and select a language if you have configured more than one language.
Time zone	Enter the time zone in which the contact is located.

4 Click on **Save**.
✓ The contact is saved.

To delete a contact

1 Click on the bot you want to use.
✓ The dashboard opens.

2 Click **Contacts** in the menu bar.
✓ The contact list opens.

3 Click on the desired contact.
✓ The contact information is displayed on the right.

4 Click **Delete user**.
✓ A pop-up window in which you have to confirm the operation opens.

5 Click on **OK**.
✓ The contact is deleted.

or

1 Click on the bot you want to use.
✓ The dashboard opens.

2 Click **Contacts** in the menu bar.
✓ The contact list opens.

3 Click **Select** at the bottom of the screen.

4 Click on the desired contact. You can select multiple contacts.

5 Click **Delete**.
✓ A pop-up window in which you have to confirm the operation opens.

6 Click on **OK**.
✓ The selected contacts are deleted.

To export contacts

1 Click **Export**.
✓ The whole contact list is saved as an Excel or CSV file on your computer.

or

1 Click **Select** at the bottom of the screen and select the contacts you want.

2 Click **Export**.
✓ The contact list is saved as an Excel or CSV file on your computer.

To import contacts

You can download a template for a CSV file that shows which fields the file should contain. Make sure that imported CSV files use the same structure.

Only CSV files can be imported. Make sure that you choose the correct separator: comma or semicolon.

1 Click **Import**.

2 Select the CSV file you want to import from your computer and click Open.

3 Click on **OK**.
✓ The contact list is imported.

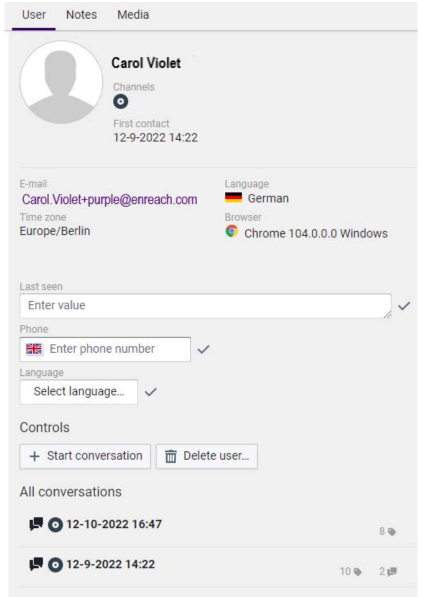
To merge contacts

1 Click **Select** at the bottom of the screen and select the contacts you want to merge.

2 Click **Merge**.
✓ A pop-up window in which you have to confirm the operation opens.

3 Click on **OK**.
✓ The selected contacts are merged.

Contact details



When you click on a contact in the contact list, a tab with contact details opens on the right side.

Under **User**, the contact information and all previous conversations are displayed. Here you can edit the information and start a conversation.

All the notes you have saved in conversations with your contacts are displayed under **Notes**.

Under **Media** you can see all the files and images you exchanged with the contact.

4.5 MANAGING BOTS

Under **Extras Options** you can manage your bots.

To deactivate a bot
To reactivate a bot
To move a bot to another environment
To clone a bot
To delete a Bot

To deactivate a bot

1. Click on the desired bot.
   ✓ The dashboard opens.
2. Click **Settings** in the menu bar.
3. Click on **Extra Options**.
4. Click **Deactivate {name of the bot}**.
   ✓ A pop-up window in which you have to confirm the operation opens.
5. Click **Deactivate**.
   ✓ The bot is (temporarily) deactivated and you can no longer receive messages from your customers.

To reactivate a bot

1. Click on the desired bot.
   ✓ The dashboard opens.
2. Click **Settings** in the menu bar.
3. Click on **Extra Options**.
4. Click **Reactivate {name of the bot}**.
   ✓ A pop-up window in which you have to confirm the operation opens.
5. Click **Activate**.
   ✓ The bot is reactivated and you can again receive messages from your customers.

To move a bot to another environment

1. Click on the desired bot.
   ✓ The dashboard opens.
2. Click **Settings** in the menu bar.

3 Click on **Extra Options**.
4 Click **Move bot**.
✓ A pop-up window opens.
5 From the drop-down list under **Move to environment**, select the environment you want to move the bot to.
6 Click **Move**.
✓ The bot is moved.

To clone a bot

You can clone a bot as a backup or template for new bots.

1 Click on the desired bot.
✓ The dashboard opens.
2 Click **Settings** in the menu bar.
3 Click on **Extra Options**.
4 Click **Clone bot**.
✓ An pop-up window with input fields opens.
5 Enter a name for the cloned bot under **Bot name**.
6 From drop-down list under **Clone into environment**, select the environment in which you want to clone the bot.
7 Click **Clone**.
✓ The bot is cloned.

To delete a Bot

1 Click on the desired bot.
✓ The dashboard opens.
2 Click **Settings** in the menu bar.
3 Click on **Extra Options**.
4 Click **Delete bot**.
✓ A pop-up window in which you have to confirm the operation opens.
5 Click **Delete bot**.
✓ The bot is deleted.

The deletion of a bot includes all associated data (messages, contacts, etc.) and cannot be reverted.

5 CHANNELS

Under **Channels**, you can configure all social messaging platforms that will be used in an environment. DialoX - Social Messaging supports various messaging channels e.g. Web Widget, WhatsApp or Microsoft Teams.

Web widget

WhatsApp

Microsoft Teams

5.1 WEB WIDGET

You can set up a chat widget on your website to provide support to the visitors. The web widget can be embedded on your website so that visitors can always start a conversation with an agent by scanning the QR code or clicking the link.

5.1.1 ADDING A WEB WIDGET

You can add a web widget for your bot on your website.

To add a web widget

1. Click **Channels**.
2. Click **Web Widget**.
3. Click on **+ Enable**.
   ✓ The **Add chat widget** page opens.
4. Type your domain name under **Widget domain name(s)** and press **Enter**. Repeat the process if you want to use this widget on more websites.

> Enter your domain name without **www.** and without the path **/page/**..

5. Enable **Live visitor tracking** if you want to track or analyse visitor behaviour on your website.

> The tracking must already be embedded on your website.

6. Click on **Save**.
   ✓ The web widget is added.

5.1.2 CONFIGURING AND VERIFYING THE WEB WIDGET

You can test your widget and change the design to fit your own website.

To check your web widget

1. Click **Design**.
   ✓ An editor opens where you can see and customise the appearance of the widget.
2. Click **Select preview site...** in the drop-down menu and select your website URL if you want to view the widget on your website rather than on a blank page.
3. Click **Share link** to display the widget at the top of your website.

> Note that the widget preview does not work on all websites. Some websites prevent loading within an iframe, causing this feature to not work properly.

To customise the design of your web widget

1. Under **Color**, select a colour for the widget.

2 Click on the folder in the square under **Button image** and choose one of the following options to edit the widget image:

Option	Explanation
Upload	Upload an image from your computer Select the image you want to use as your profile picture from your local storage and click **Open**.
Enter URL	Upload an image from an online storage/cloud Enter the URL of the image you want to use for the widget and click **OK**.
Remove	Remove the existing image Click **Remove** to delete the image you set.

3 Select under **Web-based chat** whether you want to allow your customers to communicate directly on the website and in real time. The following options are available:

Option	Explanation
Always available	The chat function is always available.
Only when operators available	The chat function is only available when agents are available.
Off	The chat function is deactivated.

4 Enable the **Leave a message** button if you want to allow your customers to send an email.

5 Under **WhatsApp**, enter the phone number you configured your bot with.

6 Click **Add Telephone button**, select the country and enter the phone number of your company if you want to allow your customers to call you.

It is recommended to disable email and phone and enable only WhatsApp.

7 Under **Customize labels...**, edit the home page label and click **Save**.

8 Click on Save .

✓ The changes are saved.

To apply the changes and configured settings, you must first click Publish .

5.2 WHATSAPP

To communicate their customers via WhatsApp, you have to complete a WhatsApp Business registration and activate a WhatsApp channel in DialoX - Social Messaging.

5.2.1 REQUIREMENTS

Facebook Business Account

You must have a personal Facebook login with access to your Facebook Business account. Check this by logging into your Facebook Business account using the link below:

business.facebook.com/settings/people.

Make sure you have administrator rights for your company's Facebook account.

Registration on 360dialog

To connect WhatsApp to your Inbox, you have to create a WhatsApp for Business API account on 360dialog. 360dialog helps you to connect one of your registered phone numbers with WhatsApp for Business.

Once the process is complete, you will receive an API key that you have to enter when adding the WhatsApp channel in DialoX - Social Messaging. For more information about registering on 360dialog, visit docs.360dialog.com/embedded-signup.

It is recommended to connect your landline number with WhatsApp for Business. Your customers can recognise the number and check its validity anytime by calling and communicating with your agents.

5.2.2 ADDING A WHATSAPP CHANNEL

You can add a WhatsApp channel for your bot on your website. You have two options to add a WhatsApp channel in DialoX - Social Messaging:

- *Adding a WhatsApp channel manually*
- *Adding a WhatsApp channel automatically*

5.2.2.1 ADDING A WHATSAPP CHANNEL MANUALLY

To add the WhatsApp channel manually, you have to already be registered on 360dialog (see *Registration on 360dialog*). After the registration, you receive an API key that you will use when adding the WhatsApp channel in DialoX - Social Messaging.

To add a WhatsApp channel manually

1 Click **Channels**.

2 Click on **WhatsApp**.

3 Click on **+ Enable** .

✓ The **Add WhatsApp bot** page opens.

4 Click on **Manual WhatsApp signup**.

5 Under **WhatsApp phone number**, enter the phone number you used when registering on 360dialog.

6 Under **360dialog API key**, enter the API key you received after the registration on 360dialog.

7 Click **Connect**.

✓ The WhatsApp channel is added.

8 Test your WhatsApp channel by opening WhatsApp and sending a message to the provided phone number.

To apply the changes and configured settings, you must first click **Publish** .

5.2.2.2 ADDING A WHATSAPP CHANNEL AUTOMATICALLY

You can add a WhatsApp channel automatically without first registering with 360dialog. The process starts on the DialoX - social messaging platform.

To add a WhatsApp channel automatically

1 Click **Channels**.

2 Click on **WhatsApp**.

3 Click on **+ Enable** .

✓ The **Add WhatsApp bot** page opens.

4 Click on **Automatic WhatsApp signup**.

5 Click **Connect to WhatsApp**.

✓ You will be redirected to the registration page on the 360dialog website.

It is recommended not to use the **Log in with Facebook** option. The login data of your personal Facebook account will otherwise be adopted for 360dialog and you would always have to use this account to change information in WhatsApp.

6 Enter your email address, name and a password in the appropriate fields and click **Sign up**.

Note that when you register with 360dialog, your password must not contain any personal information or characters from your username. The password must be unique.

7 Make sure you meet the following requirements and select the check boxes:

- You have a personal Facebook account.

- The phone number you want to use is not already connected to another WhatsApp account.
- You can check your number through SMS or international calls.

8 Click on **Continue with Facebook**.

9 Sign in to Facebook by clicking **Continue** then **Continue as {your name}**.

10 Click on **Get started**.

11 Click **Continue to** grant permissions to 360dialog.

12 Follow the instructions in order to:

- Create a Meta and WhatsApp business account.
- Create your WhatsApp profile.
- Check your WhatsApp Business number.

13 To enable the DialoX Studio to retrieve the generated API code, authorise the partner application with the following steps:

- Log in to 360Dialog
- Click on your profile in the lower left corner
- Click Organisation Settings
- Select the desired number
- Save the changes

✓ After the successful registration, the WhatsApp channel will be connected to the created accounts.

For more information about registering on 360dialog, visit docs.360dialog.com/embedded-signup.

14 Test your WhatsApp channel by opening WhatsApp and sending a message to the provided number.

To apply the changes and configured settings in DialoX - Social Messaging, you must first click Publish .

5.2.3 TEMPLATES

To initiate a conversation on WhatsApp, Meta requires the use of a template message. Therefore, you must first define a template that can be used for outgoing messages.

You have three options to create the template:

- Create template with 360Dialog
- Create template via the Meta Business Admin Portal
- Create template using our template creation API

You can send a predefined template message to contact the user. The template must contain the following two variables:

1 the name of the user

2. the message.

If you have not created a template, DialoX - Social Messaging will provide you with a template (e.g. **botsqd_reengagement**) when you enable the WhatsApp channel.

By clicking **Manage templates** you will be redirected to the 360dialog website where you can create and manage your own templates.

To choose an template

1 Click **Engagement template**.

2 Select a template from the drop-down list that will be sent as a preconfigured message to contact a user.

3 Click **Use this template**.

✓ The bot will now use the template.

5.3 MICROSOFT TEAMS

With the Enreach Virtual Agent (EVA), you can use Microsoft Teams to chat and provide support to customers over other social messaging channels.

5.3.1 ADDING A MICROSOFT TEAMS CHANNEL

To use your bot in Microsoft Teams, you have to add a channel in DialoX - Social Messaging and connect the bot to a team in Microsoft Team.

To add a Microsoft Teams channel

1 Click **Channels**.

2 Click **Microsoft Teams**.

3 Click on **+ Enable**.

✓ A pop-up window for the configuration of the Microsoft Teams Inbox opens.

4 Click **download the zip file** to download the installation file.

> ⚠ Do not unzip the zip file! The installation of the Enreach Virtual Agent (EVA) in Microsoft Teams would fail.

5 Click [clipboard icon] to copy the text from the field to the clipboard.

6 Connect your bot to a Microsoft Teams channel.

To connect your bot to a Microsoft Teams channel

1 Open the Microsoft Teams app.

2 Click **Teams** in the menu on the left.

3 Click **Join or create team** in the menu bar.

4 Select an existing team.

or

4 Create a team and give your new team a name.

5 Add the people who need access to reply to incoming messages.

6 Click the Apps icon at the bottom of the menu bar to install the downloaded ZIP file in your Microsoft Teams account.

7 Click the **Add to a Team** button and select the team you want to use for your bot.

8 Send a message containing the text you copied to the clipboard (see To add a Microsoft Teams channel, page 32, step (5)).

- Enter **@EVA** in the selected channel.
- Now paste the text that you copied to the clipboard.
- Press **Enter**.

✓ The Microsoft Teams channel is connected to your bot.

5.3.2 USING THE MICROSOFT TEAMS CHANNEL

When you receive new messages, the Enreach Virtual Agent (EVA) places them as separate conversations in the Teams channel where the EVA app was installed. A conversation is displayed as a card and new conversations (map with white background) are added below the last one.

A card displays the most important information about the user and the message. Three options are available:

Option	Explanation
Take	Take To assign yourself a conversation
Go to Inbox	Go to inbox Open the DialoX - Social messaging inbox so that the conversation can be handle there
History	History Check the user message history

To take a conversation

1 Click on the conversation you want to take.

2 Click **Take.**
   - ✓ The conversation is opened and the message **Conversation assigned to {Name}** appears.
   - ✓ The **Take** button is replaced by the **Close** button, which allows you to end the conversation.

To send a message

1 Click on the conversation in which you want to send a message.

2 Enter **@EVA** in the input field.
   - ✓ A drop-down list with EVA appears.

3 Select **EVA** and enter your message.

The word **EVA** must have a different colour (purple) than the message text. If **@EVA** is not correctly used, the message will not be forwarded.

4 Press the Enter key to send the message.
   - ✓ The message is transmitted to the recipient using EVA.
   - ✓ EVA displays the responses and you can decide if you want to send another message.

Closing a conversation

When a conversation ends, it can be closed with the **Close** button. When the client sends a new message, a new conversation card is created. It is usual to close a conversation as soon as the original question is answered.

To close a conversation

1 Click on the conversation you want to end.

2 Click **Close**.
   - ✓ The conversation is closed and the colour of the card changes from white to grey.

Microsoft Teams does not prevent you from replying to a closed conversation. You must however be aware that messages sent in a closed conversation will not be forwarded to the recipient.

It is recommended to use Microsoft Team only for quick, short conversations. If you have a longer conversation, use the Inbox of DialoX - Social Messaging.

6 USING STUDIO INBOX

Conversations that are forwarded to an agent or operator are moved to the **Inbox** area.

In the menu bar next to **Inbox**, a red dot indicates that there are new conversations.

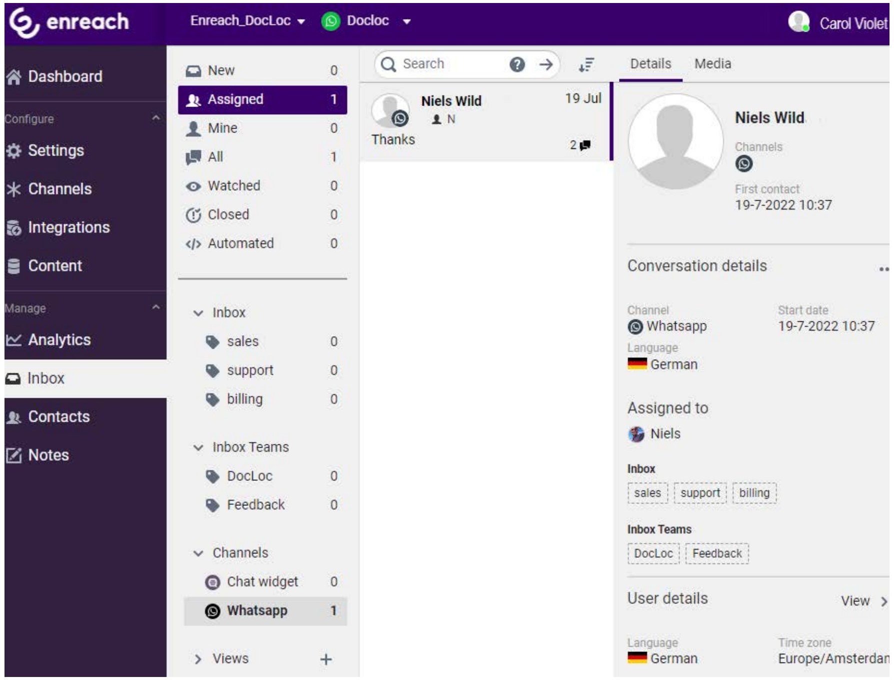
To open the Studio Inbox

1 Click on the drop-down menu next to the logo of your organisation and select the desired environment.
✓ The environment opens and the created bots are displayed.

2 Click on the bot you want to use.
✓ The dashboard opens.

3 Click **Inbox** in the menu bar.
✓ The Inbox opens and you see the different folders in which conversations are displayed.

6.1 FOLDER OVERVIEW



Depending on the status, conversations are displayed in a specific folder of the Inbox. Depending on the access rights, the **All** and **Automated** folders are also displayed.

Status	Explanation
New	Conversations that have been received but not yet assigned to an agent.
Assigned	Conversations assigned to agents other than you.
Mine	Conversations assigned to you.
Watched	Conversations that are being handled by other agents but that you (want to) follow.

Status	Explanation
Closed	Completed conversations that require no further action.
All	An overview of all current conversations (The conversations from all orders are displayed here)
Automated	An overview of all conversations that have not yet been transferred to an agent (i.e. that are actually being processed by the bot)

Once a conversation is assigned, you can join it and reply.

6.2 ASSIGNING CONVERSATION

When a new conversation comes in, you receive a pop-up notification. You have two options:

- Ignore the conversation: Click on **Ignore**.
- Handle the conversation: Click on **Go to inbox**. You are redirected to the Studio Inbox where you can assign and/or handle the conversa-tion.

Before a conversation can be handled, it must be assigned to a user. New conversations are placed in the **New** folder until they are assigned to a user.

6.2.1 ASSIGN TO ME

Users with the **Agent** or **Operator** role can assign themselves a conver-sation. The conversation will then be moved from the **New** folder to the **Mine** folder. For your colleagues, this conversation will be displayed in the **Assigned** folder. No conversation is lost and everything remains transparent for the whole team.

Once a conversation is assigned, you can join it and reply.

To assign yourself a conversation

1. Click on the **New**, **Assigned** or **Watched** folder.
   ✓ All conversations in the selected folder are displayed.
2. Click on the conversation you want to assign.
3. Click the **Assign to me** button.
   ✓ The conversation is moved to the **Mine** folder and you can handle it.

6.2.2 ASSIGN TO ANOTHER PERSON

New conversations can be assigned to another person. You can also reassign an already assigned conversation to another person.

To assign a new conversation to another person

1. Click on the **New** folder.
   ✓ All new conversations are displayed.
2. Click on the conversation you want to assign.
3. Click the **Assign to...** button.
   ✓ A drop-down list with the names of your colleagues appears.
4. Select the colleague to whom you want to assign the conversation.
   ✓ The conversation is moved to their **Mine** folder and they can han-dle it.

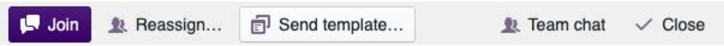
To reassign a conversation

1. Click on the **Mine** or **Assigned** folder.
   ✓ All conversations in the selected folder are displayed.
2. Click on the conversation you want to reassign.
3. Click the **Reassign to...** button.
   ✓ A drop-down list with the names of your colleagues appears.

4 Select the colleague to whom you want to assign the conversation.
✓ The conversation is moved to their **Mine** folder and they can handle it.

> The **Reassign to...** button is only available if the conversation has already been assigned to someone.
> If you want to reassign a conversation that is assigned to someone else, you must first assign it to yourself.

6.3 JOINING AND LEAVING A CONVERSATION



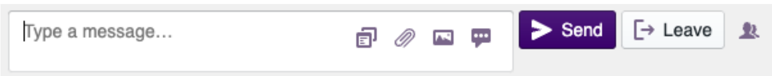
When a conversation is assigned to you, you can either take it yourself, leave to reassign it or close it.

To take a conversation

1 Click on the **Assigned** or **Mine** folder.
✓ All conversations in the selected folder are displayed.

2 Click on the conversation you want to take.

3 Click the **Join** button.
✓ You join the conversation and more options are available in the input bar.



To leave a conversation

1 Click on the **Assigned** or Mine folder.
✓ All conversations in the selected folder are displayed.

2 Click on the conversation you want to leave.

3 Click the **Leave** button.
✓ You leave the conversation and can reassign it to a colleague or close it if you want to continue handling it.

6.4 SENDING MESSAGES

When you receive a message, you can use the input bar to type your response.

There are icons at the bottom of the input bar that provide additional options when writing your message. You can:

- show formatting tools
- send a picture
- send a file
- send a template
- activate the team chat
- use canned responses

To show the formatting tools

1 Click on A .
✓ The formatting tools are displayed above the input field and can be used.

To send an image

1 Click on  .

2 Select an image from your computer and click **Open**.

or

2 Copy and paste an image (also with **Ctrl+V** on Windows and **cmd+V** on Mac).

3 Click on  .

✓ The image is sent.

To send a file

1 Click on  .

2 Select a file from your computer and click **Open**.

3 Click on **Send** .
✓ The file is sent.

You can also drag and drop files and images from the file manager into the input bar.
Before sending, you can check the files and remove unwanted files by clicking the **X** button.

To send an template

You can send a template. This feature is only available for WhatsApp conversations.

1 Click on .

2 Select a template from the drop-down list.

3 Click on **Send** .
✓ The template is sent.

Team chat

The Team chat feature allows you to consult a colleague in a conversation without your contact seeing the exchange.

To use the team chat

1 During your conversation, click .
✓ The team chat mode is activated.

2 Enter **@** in the input field.
✓ The list with your colleagues opens in a pop-up window.

3 Select the colleague you would like to consult.

4 Write your message after the name and click **Send team message** .
✓ The message is sent to your colleague.
✓ The conversation will now be automatically watched by your colleague.

5 Click again on to exit the team chat.

Canned responses

For frequently asked questions, you can save preformulated answers and use them for several conversations. These answers can be added to the **Canned Responses** list.

To add a canned response

1 Click in the input bar after you have joined a conversation.
✓ A pop-up window opens in which you can manage the canned responses.

2 Click **Add canned response**.

3 Enter the desired canned response in the input field.

4 Click on **Save** .
✓ The canned response is saved.

To send a canned response

1 Enter a text in the input field.
✓ A list of canned responses containing the text you entered is displayed.

2 Click on the desired canned response.

3 Click on **Send** .
✓ The canned response is sent.

To delete a canned response

1 Click in the input bar after you have joined a conversation.
✓ A pop-up window opens in which you can manage the canned responses.

2 Hover over the canned response you want to delete and click on .

3 Click on Save .
✓ The canned response is deleted.

6.5 WATCHING A CONVERSATION

There are two ways to watch a conversation:

- You enable the watching yourself.
- You are invited to a conversation through the team chat. The conversation is automatically displayed in your **Watched** folder.

To enable the watching of a conversation yourself

1 Click on the conversation you want to watch.

2 Click the **Watch** button.
✓ The conversation is moved to the **Watched** folder and you can follow the processing.

> You can stop watching anytime by clicking on the **Unwatch** button.

6.6 CLOSING A CONVERSATION

After you have successfully handled a conversation, you can close it. A closed conversation is moved from all other folders where it is displayed to the **Closed** folder. You can always view the content there again.

To close a conversation

1 Click **Leave** in the input field.
✓ The conversation ends and the input field is discarded.
✓ The **Close** button appears in the bar.

2 Click **Close**.
✓ The conversation is closed and moved to the **Closed** folder.

> You can close a conversation only if it has been assigned to you.

A closed conversation cannot be reopened. You can only reengage the contact by starting a new conversation.

6.7 FURTHER OPTIONS IN THE INBOX

The Studio Inbox gives you more options when handling conversations.

6.7.1 SORT CONVERSATIONS

You can sort conversations in your inbox by name or by date of receipt.

To sort conversations

1 Click on the desired bot.
✓ The dashboard opens.

2 Click **Inbox** in the menu bar.
✓ The Inbox opens.

3 Click next to the search box.
✓ A pop-up window with following options opens.

Option	Explanation
Most recent	**Latest** Conversations are sorted by date and time of receipt, from the most recent to the oldest.

Option	Explanation
Least recent	**Oldest** Conversations are sorted by date and time of receipt, from the oldest to the most recent.
Name ascending	**Name ascending** The conversations are sorted by sender's name in ascending order (from A to Z).
Name descending	**Name descending** The conversations are sorted by sender's name in descending order (from Z to A).

4 Select an option.
✓ The conversations are sorted according to the desired option.

The icon next to the search box changes depending on the selection. Click the displayed icon to change the option.

6.7.2 DOWNLOAD TRANSCRIPT

You can download the transcript of a conversation. That is a copy of the exchange between bot/agent and customer. Transcripts contain the full message text with dates and times starting from the moment the bot relays the conversation to human agents (escalation).

To download a transcript

1 Click on the desired bot.
✓ The dashboard opens.

2 Click **Inbox** in the menu bar.
✓ The Inbox opens.

3 Select the conversation you want to download.

4 Under the title bar, click .

5 Click **Download transcript**.
✓ The conversation is saved as a text file (.txt) on your computer.

6.8 NOTES

During a conversation, you can create notes that can serve as a memo or to-do list. In the menu bar next to **Notes**, a red dot indicates that you have unprocessed notes.

6.8.1 CREATING NOTES

When you create a note, it is displayed within the conversation in which it was created and is only visible to you.

To create a note

1 Click ••• in the tab with the conversation details.
✓ A pop-up window with several options opens.

2 Click **Add note**.
✓ A pop-up window opens where you can create the note.

3 Type your message and click + Add.
✓ The note is created and displayed in the opened conversation.

To display notes

1 Click on the bot you want to use.
✓ The dashboard opens.

2 Click **Notes** in the menu bar.
✓ The list opens and the notes are displayed with their processing status:

- **New** for unprocessed notes
- **Done** for processed notes.

Click on the drop-down menu next to to filter the notes according to their processing status.

6.8.2 MANAGING NOTES

To mark a note as done

To unmark as done

To delete a note

All the created notes are displayed in the menu bar under **Notes**. With a click, you can open the note and see the details and processing options.

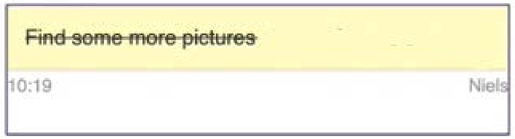
Option	Explanation
Go to conversation	Go to conversation Click on this button to open the conversation where you created the note.
Go to contact	Go to contact Click on this button to open the information of the contact for whom you have created the note.
Mark as done	Mark as done You can mark a note as done when it has been processed.
Unmark as done	Unmark as done This button is displayed when a note is already marked as done. You can undo this and process the note later.
Delete	Delete Click on the **Delete** button to delete the note.

To mark a note as done

1 Click **Notes** in the menu bar.
✓ The created notes are displayed.

2 Click on the note you want to edit.
✓ The note opens and you can see the details and processing options.

3 Click **Mark as done**.
✓ The note is shown with a strikethrough in the open conversation.
✓ Under **Notes**, the status is changed from **New** to **Done**.



or

1 Click **Notes** in the menu bar.
✓ The created notes are displayed.

2 Click **Select** and select the note which status you want to change. You can select several notes.

3 Click **Set status**.
✓ A pop-up window with following options opens:
- Done
- New

4 Click **Done**.
✓ Under **Notes**, the status is changed from **New** to **Done**.

To unmark as done

1 Click **Notes** in the menu bar.
✓ The created notes are displayed.

2 Click on the marked note that you want to edit.
✓ The note opens and you can see the details and processing options.

3 Click **Unmark as done**.
✓ The note is again displayed in the opened conversation without strikethrough.
✓ Under **Notes**, the status is changed from **Done** to **New**.

or

1 Click **Notes** in the menu bar.
✓ The created notes are displayed.

2 Click **Select** and select the note which status you want to change. You can select several notes.

3 Click **Set status**.
✓ A pop-up window with following options opens:
- Done
- New

4 Click **New**.
✓ Under **Notes**, the status is changed from **Done** to **New**.

To delete a note

1 Click **Notes** in the menu bar.
✓ The created notes are displayed.

2 Click on the note you want to delete.
✓ The note opens and you can see the details and processing options.

3 Click on **Delete**.
✓ A pop-up window in which you have to confirm the operation opens.

4 Click on **OK**.
✓ The note is deleted.

or

1 Click **Notes** in the menu bar.
✓ The created notes are displayed.

2 Click **Select** and select the note you want to delete. You can select several notes.

3 Click on  .
✓ A pop-up window in which you have to confirm the operation opens.

4 Click on **OK**.
✓ The note is deleted.