

# GIOSG CHAT

Agent guide

February 2023



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# Get started

- Open your browser (Chrome or Firefox recommended)
- Go to [www.giosg.com](https://www.giosg.com)
- Click Login button

The screenshot displays the GIOSG website homepage. On the left, there is a navigation menu with the following items: Home, Industries (Real Estate, Banking, Insurance, eCommerce, Education), Solutions for (Sales, Marketing, Customer Service), and Products (Live Chat, Interaction Designer, Interaction Bot). The main content area features a central image of a man and a woman looking at a tablet, overlaid with a chatbot interface. The chatbot has a speech bubble saying "Hi, can I help you?" and the user has responded with "Sure!". To the right of the image, the headline reads "Only Meaningful Interactions" followed by the text: "We offer you digital tools for diverse, personalised and creative ways to interact with your online visitors and customers." Below this is a blue "Sign up for free" button. In the top right corner, there are "Careers" and "Login" buttons. A vertical blue bar on the right side of the page contains the text "Chat with us!".

# Get started

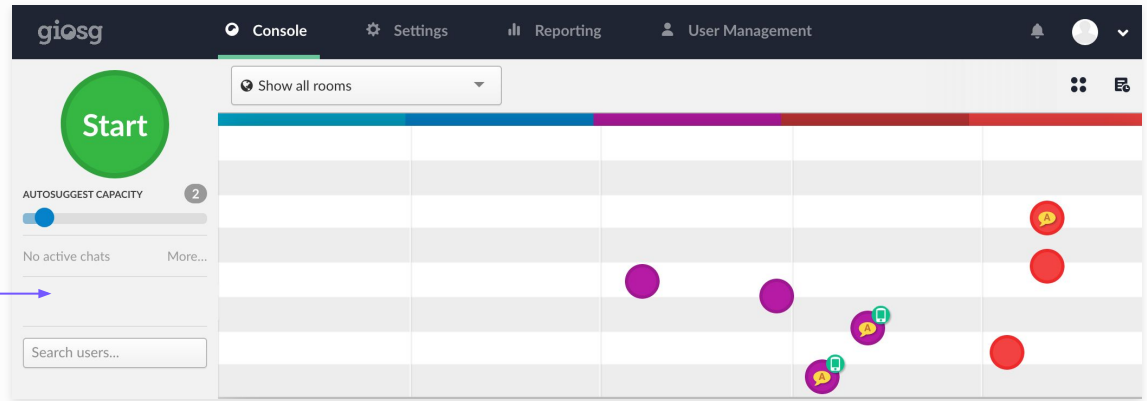
4. Fill in your email address and password
5. Get access to giosg LIVE-console

### Log in to Giosg Live

Login email

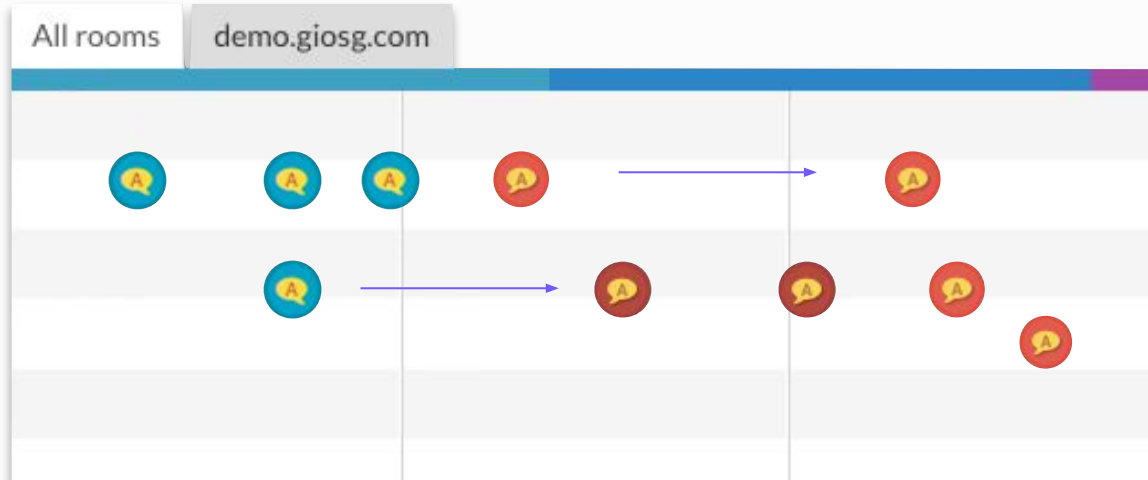
Password

[Log in](#) [Forgot password?](#)



# Read visitor analytics

- The bubbles moving to the right are the most active visitors
- Move your cursor on top of the bubble and see real-time analytics about the visitor



Visitor afotp4fmbn4az6wr7...  
Room demo.giosg.com  
Company Suomi Communications Oy  
Times visited 1  
Chats 0  
From Direct entry  
Current page **Businessx - About us**  
Location Helsinki Finland  
Time on site 00:10:47  
Browser Chrome 46.0.2490  
Device

## Recognize different visitors

The icons on the bubbles give additional information about the visitors



The yellow speech bubble with a letter “A” shows which customers have received autosuggest messages



The green speech bubble shows with whom you have had a conversation with



The small green icon on the top corner of the bubble shows which visitors are mobile visitors (mobile phone)



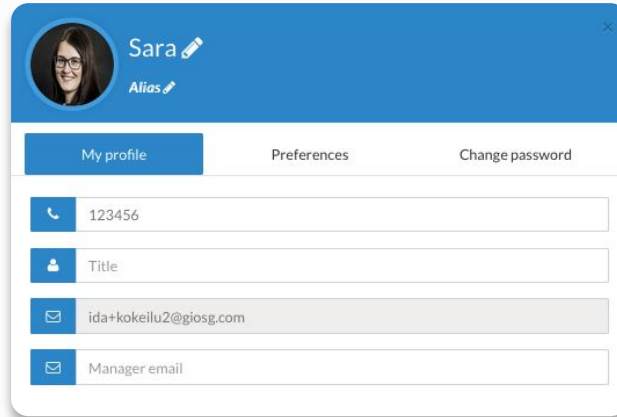
The small blue icon on top corner of the bubble shows which visitors are mobile visitors (tablet)

# Profile settings

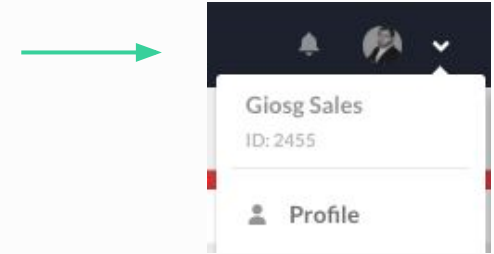
1. Go to profile settings from the top right corner of the giosg console
2. Click Profile
3. Edit your own profile settings

Add your picture.  
*This is shown for the visitors in the chat window*

The Alias name will be used for you in the chat, instead of your own name



The screenshot shows a profile settings form for a user named Sara. The form has a blue header with a profile picture placeholder and the name 'Sara' with an edit icon. Below the header are three tabs: 'My profile' (selected), 'Preferences', and 'Change password'. The 'My profile' tab contains four input fields: a phone number field with '123456', a title field, an email field with 'ida+kokeilu2@giosg.com', and a manager email field.



Add personal information. *This is not visible to visitors*

# Profile settings

You can manage your preferences in the Preferences tab

Chris (giosg) Alias

My profile | **Preferences** | Change password

UI Language: English

Enable desktop notifications

Enable spell checking

Email reports: [Modify email reports](#)

**Sound Settings**

Play sound when message arrives: Sound 2 Notification volume: 100%

Play continuously until mouse moves  Disable sounds when I'm offline

Play sound when client arrives on page: No sound

Play continuously until mouse moves

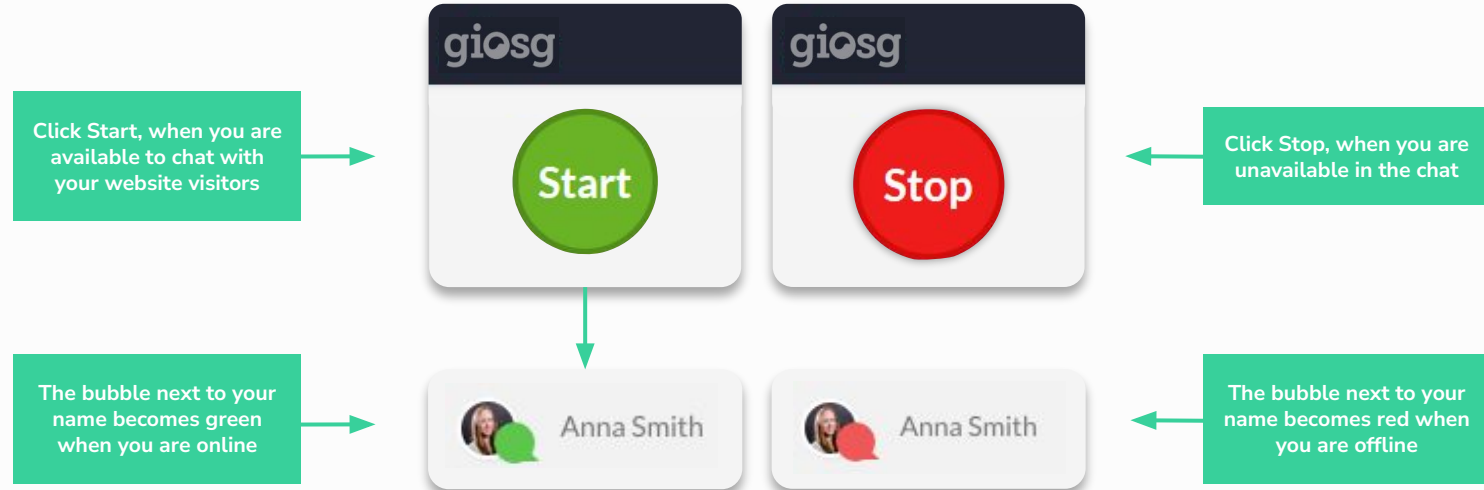
Firstline Messages: [Add new](#)

Choose the sound that is played when a visitor sends a message

Desktop notifications will announce incoming messages on your desktop

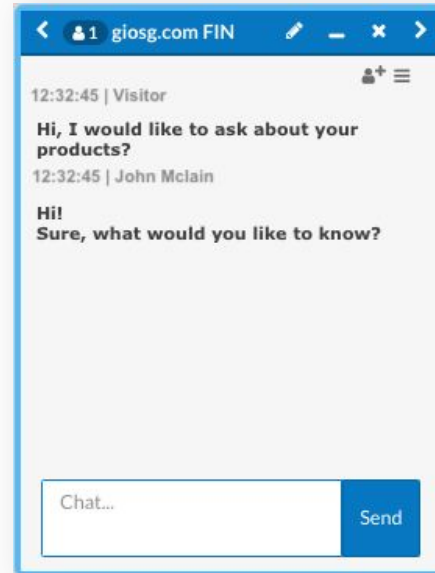


# Start chatting



# Respond to incoming chats

- Visitor sends a message which will be shown with a big red bubble
- Clicking the red bubble **12** opens the chat window and you can see the visitor's message



# Serving the customer

The screenshot displays a customer service chat interface. At the top, there is a blue header bar with a browser address bar showing 'demo.giosg.com' and a user count of '2'. Below the header, the interface is divided into three main sections: a left sidebar for visitor information, a central chat window, and a right sidebar for the shopping cart.

VISITS	TIME ON SITE	CHATS
1	00:00:30	1

**Room**  
demo.giosg.com

**Company**  
Giosg.com Oy

**Current page**  
Businexx - World leader in business!

**Last 3 pages**  
Businexx - World leader in business!

**From**  
Direct entry

**Location**  
Vantaa Finland

**Language**

**More**

**Chat History:**

- 15:19:42 | Anna: How may I help you?
- 15:19:51 | Visitor (demo.giosg.com): Hi! Can I ask you about one of your products?
- 15:19:55 | Anna joined chat
- 15:19:58 | Anna: Hi!

**Chat Input:** Chat... **Send**

**Shopping Cart:** Empty cart

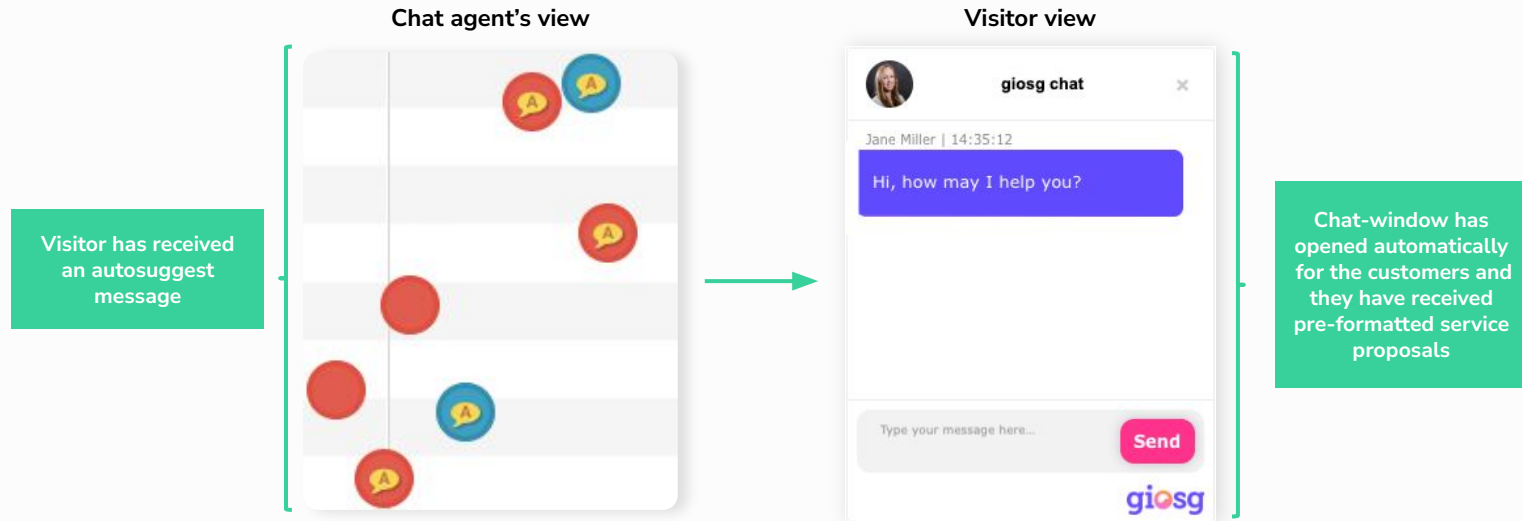
Information about the visitor

Invite a colleague

See the content of the visitor's shopping cart (requires giosg BASKET tool)

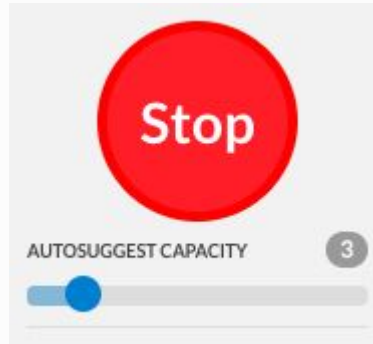
# Autosuggest messages

- Offer the customers help proactively and automatically
- The autosuggest messages are defined by your manager users



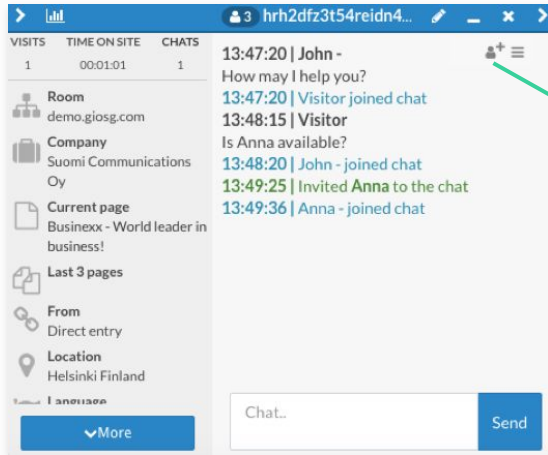
# Autosuggest capacity


- The capacity slider defines how many autosuggest messages can be sent with your name. Autosuggest messages are always sent 10 times in relation to the capacity number.
- When you have reached the amount of open conversations your capacity allows, no more autosuggest messages are sent with your name until capacity is freed by closing conversations.
- The overall capacity of the agents online affects the proactivity of the chat on your company's web page - the more proactive you are, the more chats you get



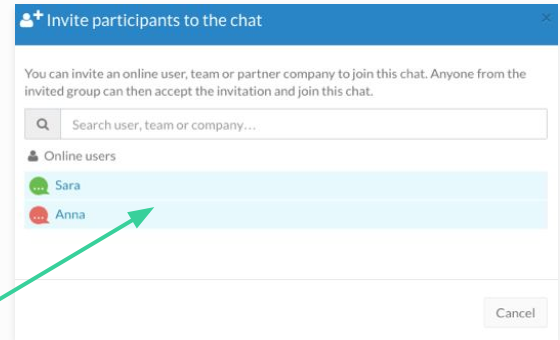
# Chat invitations

Invite your colleagues to chat conversations



1. Click  and choose your colleagues' name on the list

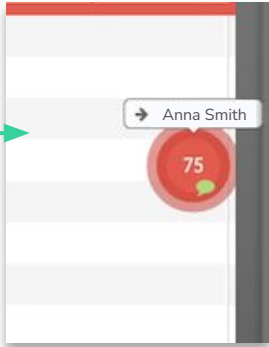
2. Click on your colleague's name to invite them



# Chat invitations

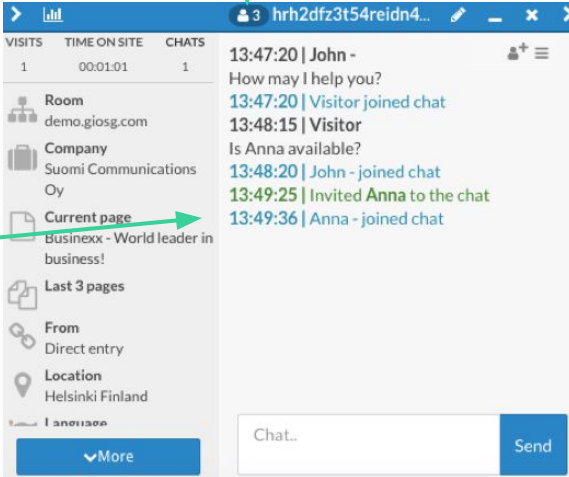
When your colleague joins the conversation, you can either stay in the conversation or leave by closing the chat window

3. Your colleague is invited to join the chat. They can join by clicking the big red bubble



4. Your colleague joined the conversation. You can stay in the conversation or leave by clicking "X".

The amount of people in the conversation



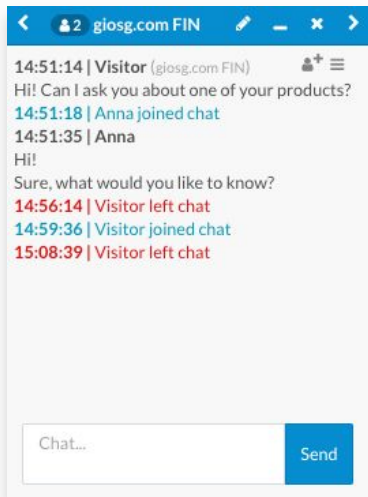
The screenshot shows a chat window with a sidebar on the left and a chat area on the right. The sidebar contains a table with columns 'VISITS', 'TIME ON SITE', and 'CHATS'. The chat area shows a conversation with a visitor and a user named John. The visitor has joined the chat, and John has invited Anna to the chat. The chat area also shows a search bar and a 'Send' button.

VISITS	TIME ON SITE	CHATS
1	00:01:01	1

13:47:20 | John - How may I help you?  
13:47:20 | Visitor joined chat  
13:48:15 | Visitor Is Anna available?  
13:48:20 | John - joined chat  
13:49:25 | Invited Anna to the chat  
13:49:36 | Anna - joined chat

# Leaving a conversation

- You can close the conversation by clicking the close “X” button.
- If the visitor stays on the website the visitor’s bubble will return to the swim lane with a green speech bubble icon.

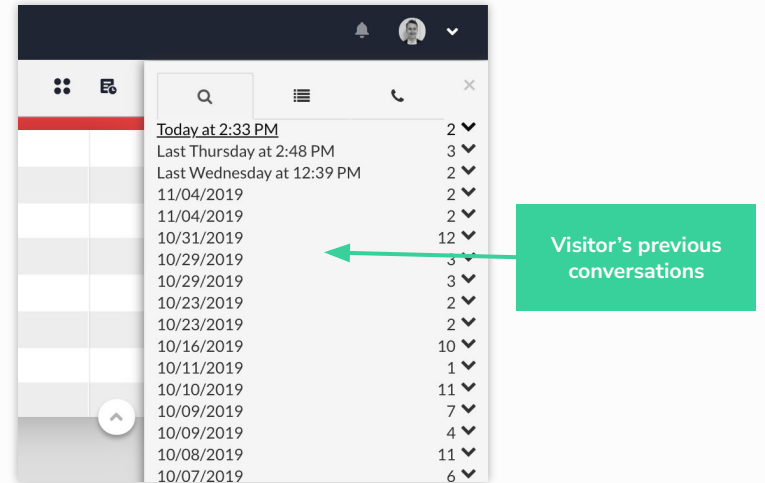
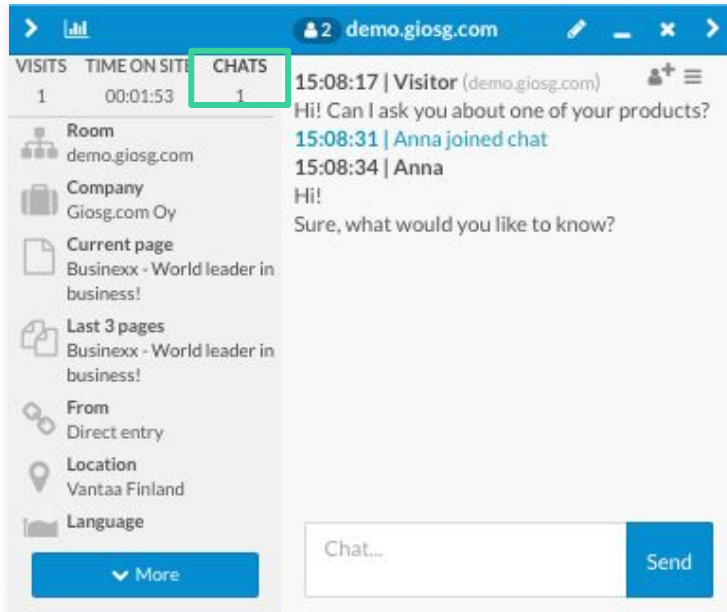




# Access previous chats with a specific visitor

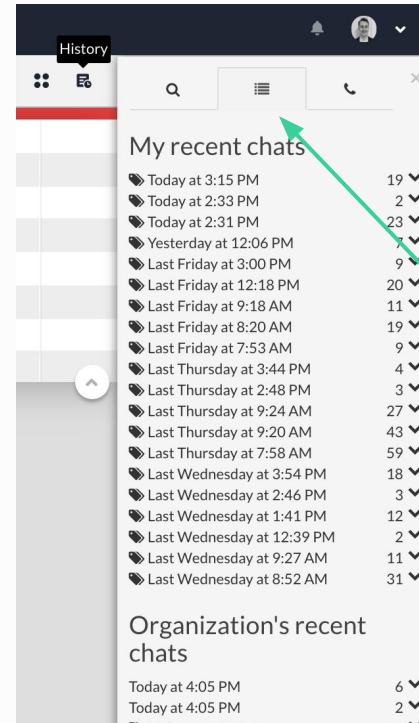
Open previous conversations with a certain visitor by clicking “CHATS”.

You will see previous conversations with the visitor on the right side of the giosg console.



## 06 Search recent chat discussions

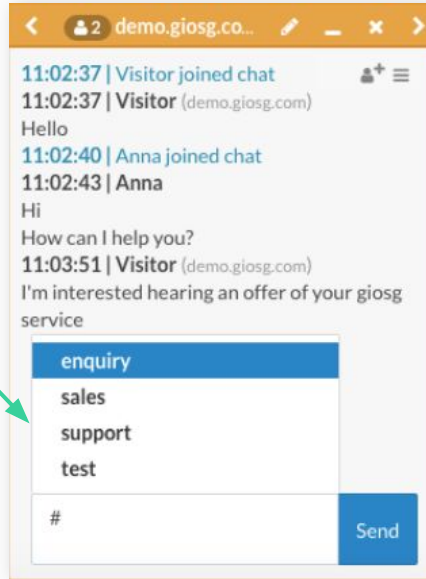
Find your own 20 recent chats and the whole organisation's 20 recent chats from the history icon in the top right corner of the "Console" view.



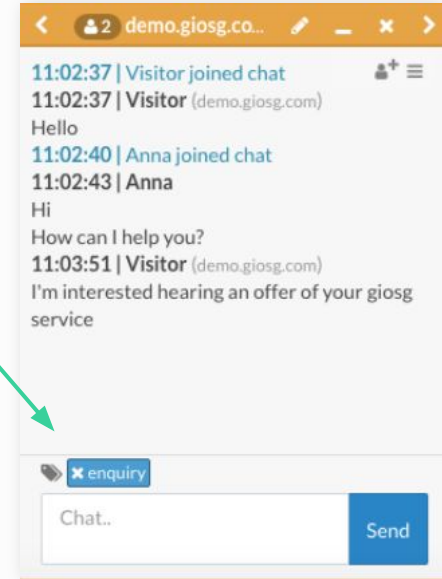
In the second tab option you can see both your own and your company's recent chats

# Tagging conversations

Write a hashtag "#" in the text field and choose a tag from the list

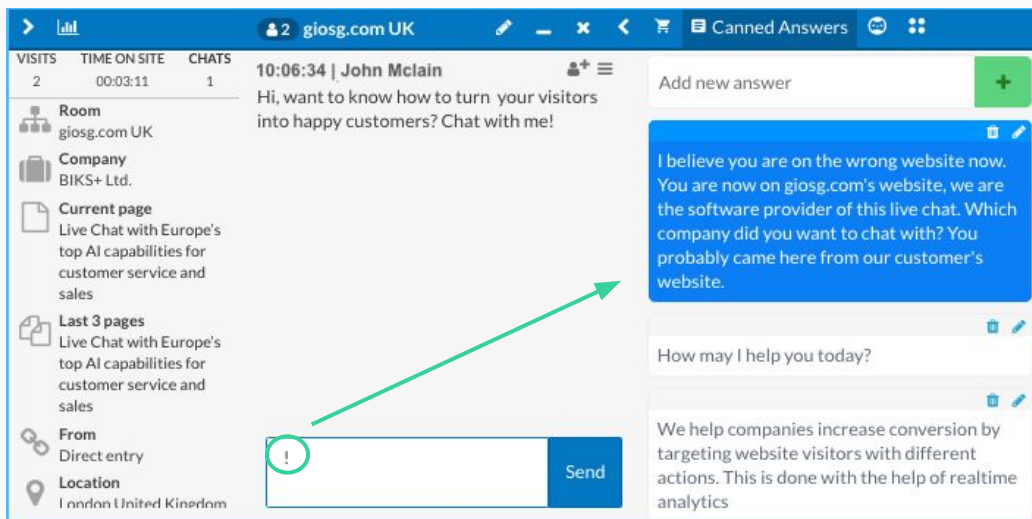


The tag you chose will be saved to the conversation



## Canned answers

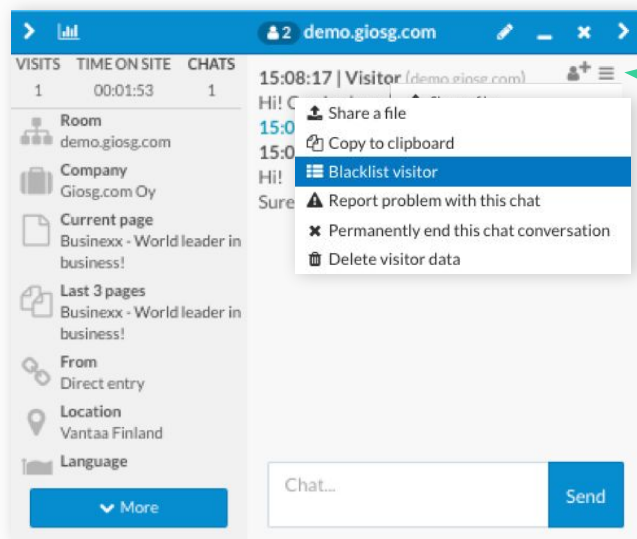
- Type an exclamation mark ! in the message field to use and modify canned answers
- You can choose the correct answer by typing something after the exclamation mark, or by scrolling the answers list



The screenshot displays a live chat window for 'giosg.com UK'. The interface includes a header with navigation icons, a table with columns for 'VISITS', 'TIME ON SITE', and 'CHATS', and a sidebar with information about the room, company, current page, and last 3 pages. The main chat area shows a message from 'John McInain' at 10:06:34. Below the message is a text input field containing an exclamation mark '!', which is circled in green. A green arrow points from this field to a list of canned answers on the right. The first answer is highlighted in blue and reads: 'I believe you are on the wrong website now. You are now on giosg.com's website, we are the software provider of this live chat. Which company did you want to chat with? You probably came here from our customer's website.' Other visible answers include 'How may I help you today?' and 'We help companies increase conversion by targeting website visitors with different actions. This is done with the help of realtime analytics.' A 'Send' button is located at the bottom right of the input field.

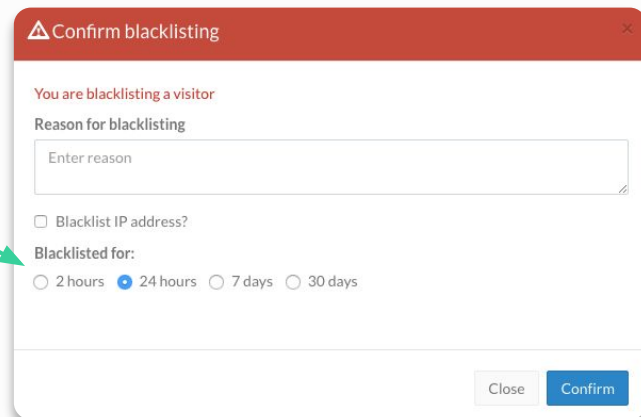
# Blacklisting visitors

Any disturbing visitors can be blacklisted. Blacklisted visitors cannot send any more messages to the chat



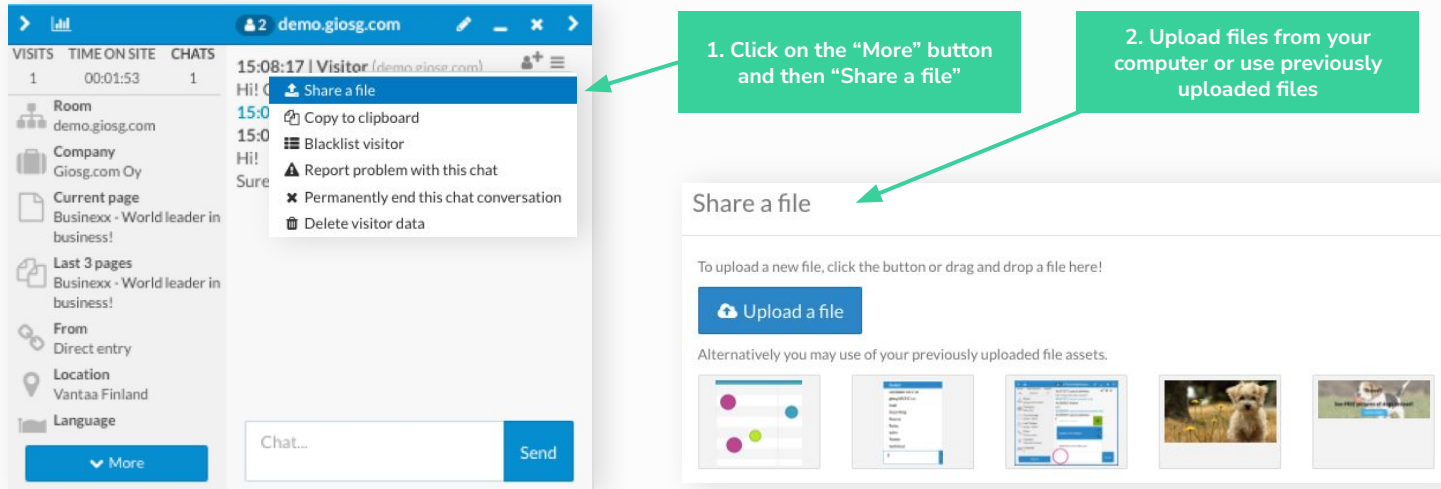
1. Click "More" button and then "Blacklist visitor"

2. Choose how long the visitor will be blacklisted for



# File sharing

You can send sales presentations, brochures and other files to the visitor through the chat.



The image shows a screenshot of the Giosg chat interface. On the left, there is a sidebar with various filters like Room, Company, Current page, Last 3 pages, From, Location, and Language. The main chat area shows a conversation with a visitor from demo.giosg.com. A context menu is open over the chat, listing options: Share a file, Copy to clipboard, Blacklist visitor, Report problem with this chat, Permanently end this chat conversation, and Delete visitor data. A green callout box points to the 'Share a file' option with the text: "1. Click on the 'More' button and then 'Share a file'". Below the chat area, there is a 'Share a file' section with an 'Upload a file' button and a list of previously uploaded file assets, including a presentation slide, a document, a screenshot, and two images of a dog.

1. Click on the "More" button and then "Share a file"

2. Upload files from your computer or use previously uploaded files

Share a file

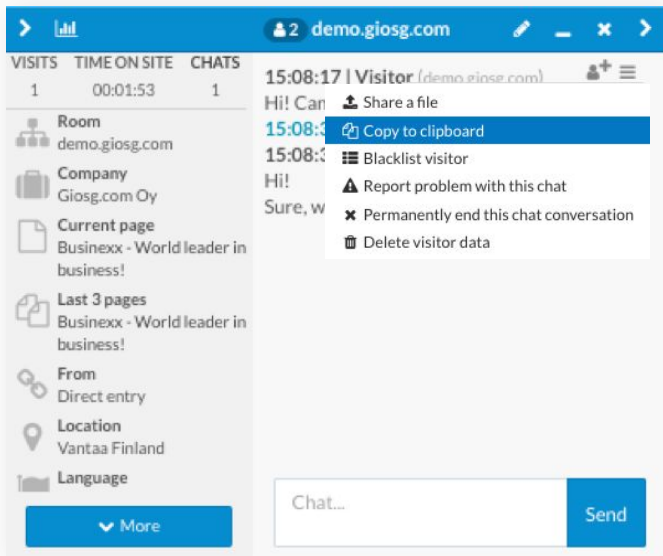
To upload a new file, click the button or drag and drop a file here!

Upload a file

Alternatively you may use of your previously uploaded file assets.

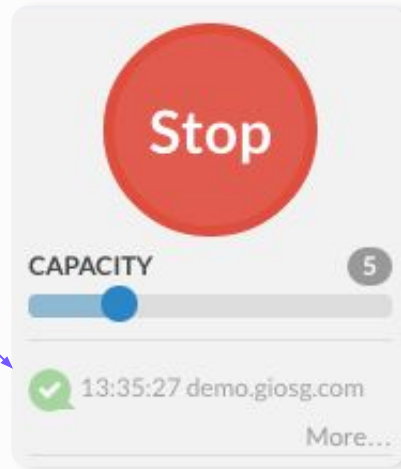
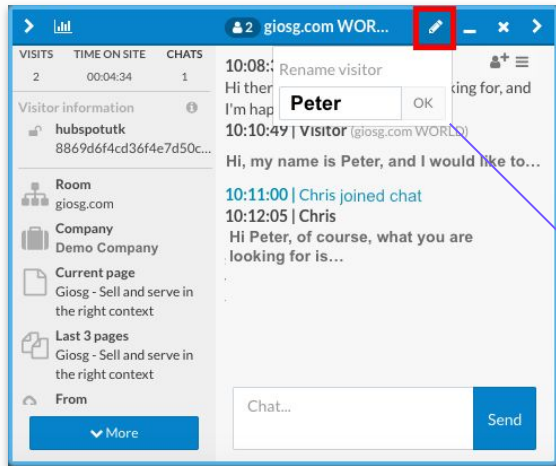
# Copy to clipboard

Copy the whole chat conversation to your clipboard.



# Naming the visitors

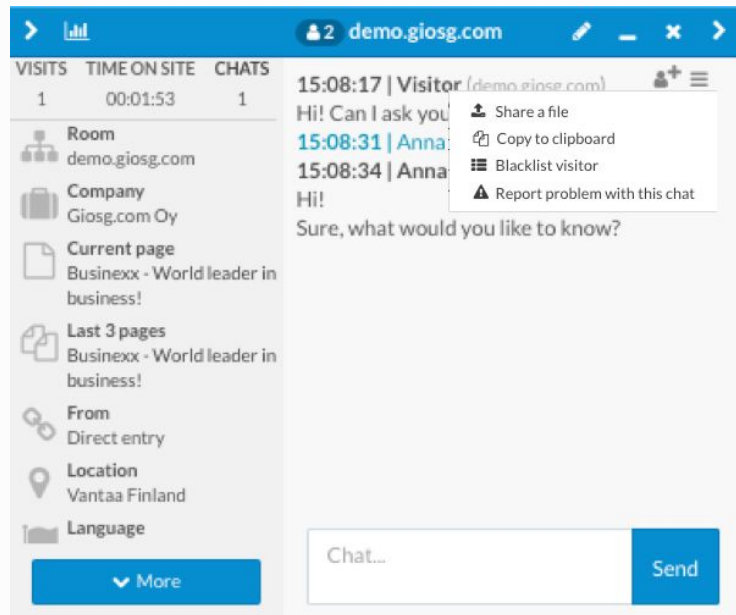
Give a name to the visitor by clicking on the “pencil”-button





## Delete visitor data

- This feature will delete all customer data regarding the visitor (visitor information + chat messages)
- Your manager users will be notified by email about the removal



The screenshot displays the Giosg visitor chat interface. At the top, there is a blue header with a signal strength indicator, a user icon, and the URL "demo.giosg.com". Below the header, a table shows chat history:

VISITS	TIME ON SITE	CHATS
1	00:01:53	1

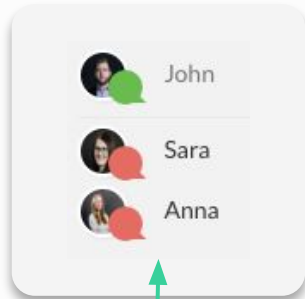
Below the table, a list of visitor information is shown:

- Room:** demo.giosg.com
- Company:** Giosg.com Oy
- Current page:** Businexx - World leader in business!
- Last 3 pages:** Businexx - World leader in business!
- From:** Direct entry
- Location:** Vantaa Finland
- Language:** [Flag icon]

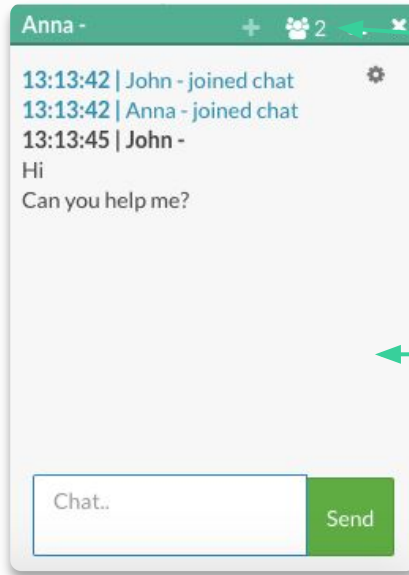
A blue button labeled "More" is at the bottom of this list. To the right, a chat window shows a message from a visitor at 15:08:17: "Hi! Can I ask you...". A context menu is open over the chat, listing options: "Share a file", "Copy to clipboard", "Blacklist visitor", and "Report problem with this chat". Below the chat, there is a text input field with the placeholder "Chat..." and a blue "Send" button.

# Operator chat

Start a chat with your colleagues in the giosg console



1. Click your colleague's name on the left panel



Add other colleagues

2. Operator chat opens. Now you can chat with your colleague in real-time.

# Contact giosg support

- Report problems with the giosg console:

1. Click on the profile button  
→ Report problem

2. Type your message in the  
text fields

3. Send the message to  
giosg support

**Report an error with this chat**

Technical info about the chat, participants etc. is automatically attached to the report.

Describe what happened? \*

Has this happened before? \*

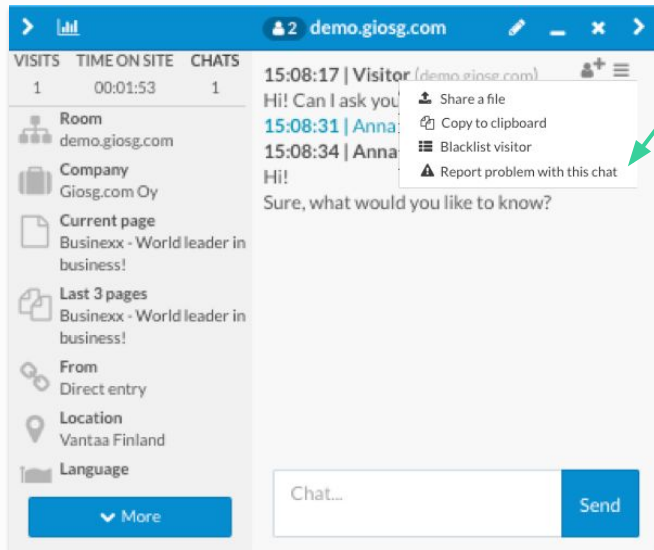
Has any other user had the same problem?

\* These fields are mandatory

Close Send

# Contact giosg support

- Send a problem report directly from the chat conversation.



1. Click the more button →  
Report problem with this chat

2. Describe what happened

3. Send the message to  
giosg support

The screenshot shows a form titled 'Report an error with this chat'. It includes a red header bar with a warning icon and the title. Below the header, there is a note: 'Technical info about the chat, participants etc. is automatically attached to the report.' The form contains three text input fields with the following labels: 'Describe what happened? \*', 'Has this happened before? \*', and 'Has any other user had the same problem?'. A red asterisk note at the bottom left of the form states '\* These fields are mandatory'. At the bottom right, there are 'Close' and 'Send' buttons. A green arrow points from the third instruction box to the 'Send' button.

## Chatting tips

1

React quickly to new conversations

2

Serve with the right style

3

Serve actively

# Chatting tips

## 1

### React quickly to new conversations

#### React immediately

Use sound effects or desktop notifications

#### Quick replies

Answer in smaller parts

Tell the customer what will happen next

#### Useful tools

Collect frequently asked questions

Send links

Ask for customer's contact information if you can't answer to their questions right away

*"It is important that you reply to your customer's questions straight away. Greet the customer/react to their messages immediately."*

# Chatting tips

## 2

### Serve with the right style

#### Be courteous

Remember to greet and thank your customers!

#### Pay attention to your spelling

With your communication style, you express yourself and your company.

#### What is the right communication style?

Pay attention to your company's image / field of business / customer's communication style

*"I start with formal communication style, but of course it varies based on the visitor. I have learned to monitor what kind of communication style the customer uses. Adjusted communication style makes the customer feel welcome."*

# Chatting tips

## 3

### Serve actively

#### Personalise the service

Own name and picture

#### Regular online presence

Remember to click Stop when you leave your computer

#### Be active

Offer help actively

Provide additional information

Inform your visitors about campaigns

*"We have tried to personalise our web store and to "give it a face". It is important that we use our own names on the chat. In addition, we also have our own pictures visible for the customers. On the chat we are the same people, with whom the customer could interact elsewhere as well."*





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Giosg is a software company that combines data and artificial intelligence (AI) with feature-rich technology. We provide intuitive solutions that deliver the right online trigger, to the right person at the right time, allowing your organisation to operate smarter. The result? A faster, more streamlined process with more sales, happier customers and a significant boost to your return on marketing investment.

[giosg.com](https://giosg.com)