

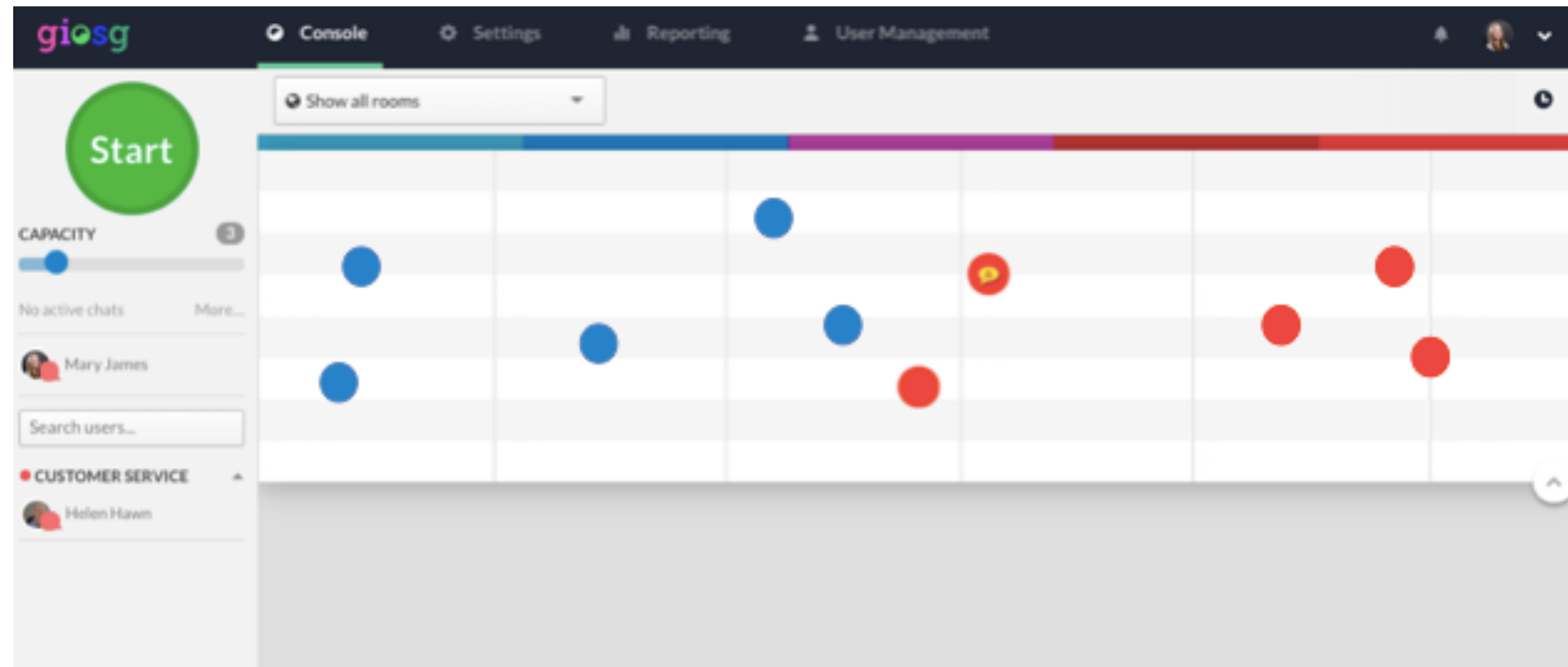
giosg

Manager
user training



Introduction

As a manager user you can edit your account's settings, such as edit the chat window and button, create autosuggest messages, view reporting and manage users.



Agenda

1
User management

2
Chat-settings

3
Reporting

4
Good to think about



Agenda

1
User management

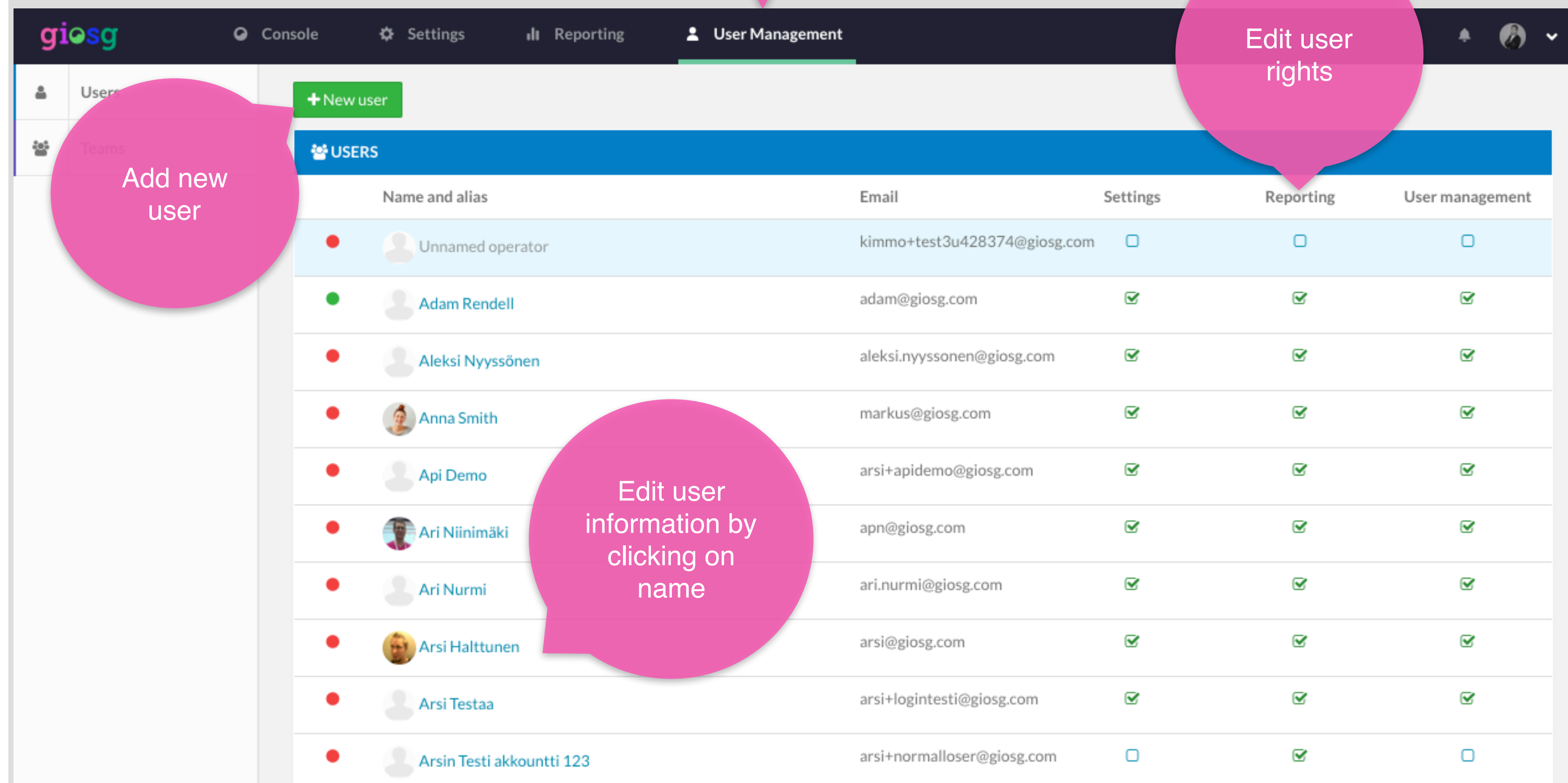
2
Chat-settings

3
Reporting

4
Good to think about

User management

- Add new users
- Edit user permissions for: settings, reporting and user management



The screenshot shows the Giosg User Management interface. A large pink arrow points down to the 'User Management' tab in the top navigation bar. A pink circle callout labeled 'Add new user' points to the '+ New user' button. Another pink circle callout labeled 'Edit user information by clicking on name' points to the name 'Ari Niinimäki' in the user list. A third pink circle callout labeled 'Edit user rights' points to the 'Settings', 'Reporting', and 'User management' columns in the table.

	Name and alias	Email	Settings	Reporting	User management
	Unnamed operator	kimmo+test3u428374@giosg.com	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Adam Rendell	adam@giosg.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Aleksi Nyysönen	aleksi.nyysönen@giosg.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Anna Smith	markus@giosg.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Api Demo	arsi+apidemo@giosg.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Ari Niinimäki	apn@giosg.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Ari Nurmi	ari.nurmi@giosg.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Arsi Halttunen	arsi@giosg.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Arsi Testaa	arsi+logintesti@giosg.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Arsin Testi akkountti 123	arsi+normalloser@giosg.com	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

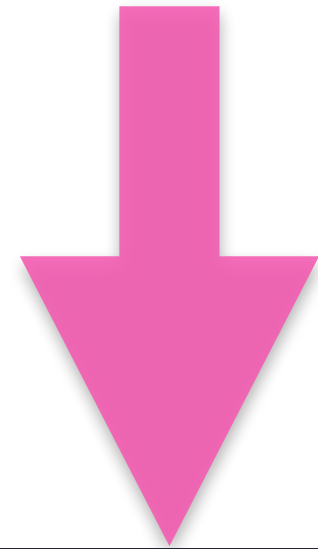
Agenda

1
User management

2
Chat-settings

3
Reporting

4
Good to think about



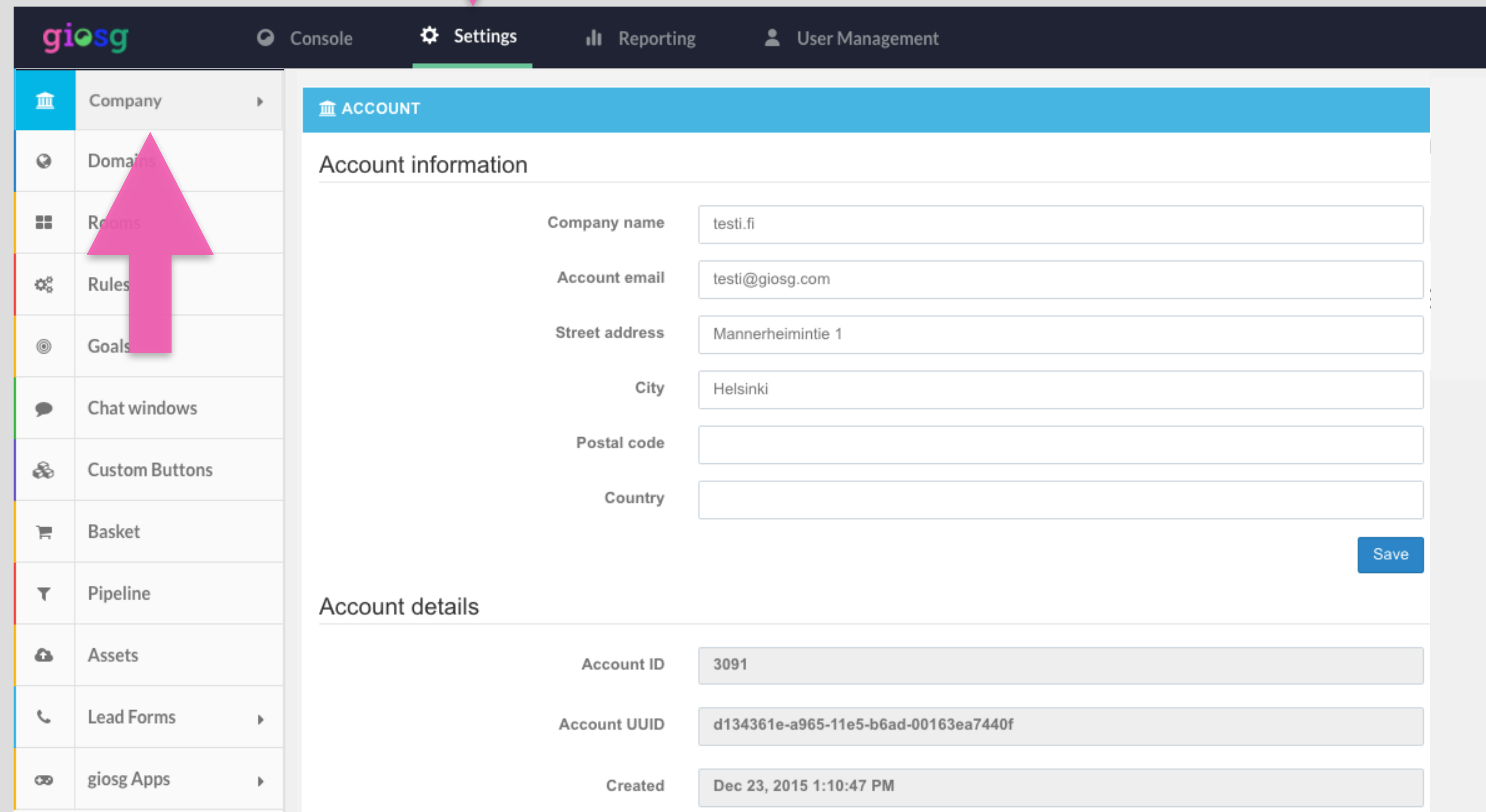
The screenshot shows the giosg application interface. At the top, there is a navigation bar with the giosg logo and menu items: Console, Settings (highlighted), Reporting, and User Management. On the left, a sidebar lists various application components: Company, Domains, Rooms, Rules, Goals, Chat windows, Custom Buttons, Basket, Pipeline, and Assets. The main content area displays six settings cards arranged in a 2x3 grid:

- Company (blue icon with a building)
- Rooms (orange icon with a globe)
- Rules (red icon with gears)
- Chat windows (green icon with a speech bubble)
- Custom Buttons (purple icon with a person)
- Lead Forms (blue icon with a telephone handset)

**Chat -
Settings**

Company settings

- From “company settings” you can find your account information and the script tag for your account.



The screenshot shows the giosg Settings page. A large pink arrow points down to the Settings tab in the top navigation bar. On the left sidebar, a pink arrow points up to the 'Company' menu item. The main content area is titled 'ACCOUNT' and contains two sections: 'Account information' and 'Account details'.

Account information

Company name	<input type="text" value="testi.fi"/>
Account email	<input type="text" value="testi@giosg.com"/>
Street address	<input type="text" value="Mannerheimintie 1"/>
City	<input type="text" value="Helsinki"/>
Postal code	<input type="text"/>
Country	<input type="text"/>

Account details

Account ID	<input type="text" value="3091"/>
Account UUID	<input type="text" value="d134361e-a965-11e5-b6ad-00163ea7440f"/>
Created	<input type="text" value="Dec 23, 2015 1:10:47 PM"/>

Domains management

From the domain settings you can edit the chat button

The screenshot displays the giosg web application interface. The top navigation bar includes the giosg logo and menu items: Console, Settings (highlighted), Reporting, and User Management. A left sidebar contains a list of navigation items: Company, Domains (highlighted with a pink arrow), Rooms, Rules, Goals, Chat windows, Custom Buttons, Basket, Pipeline, Assets, Lead Forms, and giosg Apps. The main content area shows a 'Domain management' section with a table of domains. The table has columns for 'Auto suggest', 'Chat', and 'Priority'. A row is visible for the domain 'demo.giosg.com', which has 'Auto suggest' checked, 'Chat' checked, and a 'Priority' of 5. A pink callout bubble with the text 'Edit chat-button settings' points to the chat button icon in the domain's settings bar.

Auto suggest	Chat	Priority
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5

Customize chat button

- Click on the speech bubble in “domains management”
- You are able to edit the chat-button settings

Chat now

Enable

Position

Library

Mobile chat button

Custom elements

Design Save Close

Position of the chat button on the screen

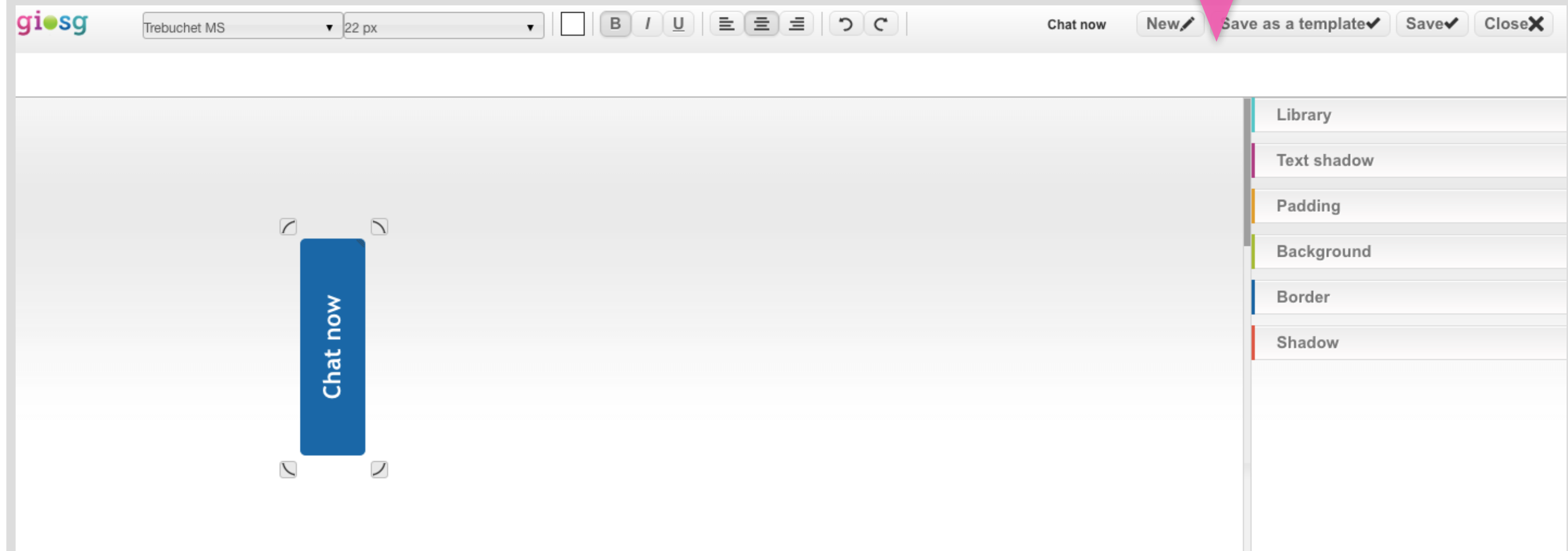
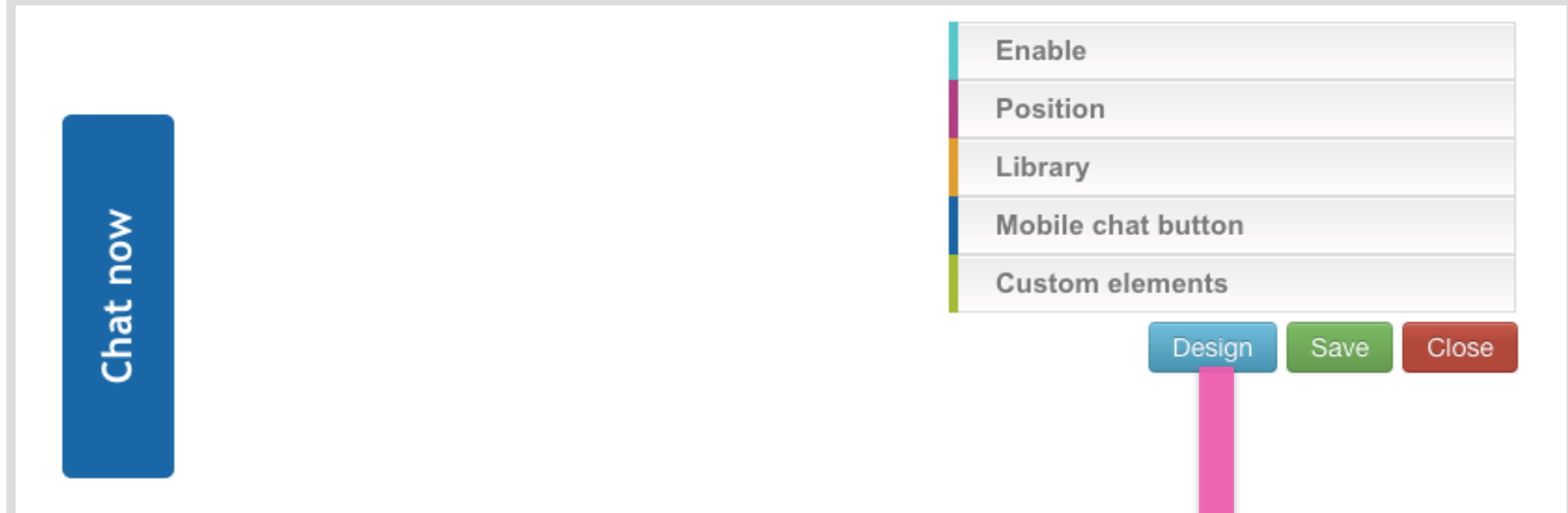
Custom elements

Enable chat-button

Chat-button library

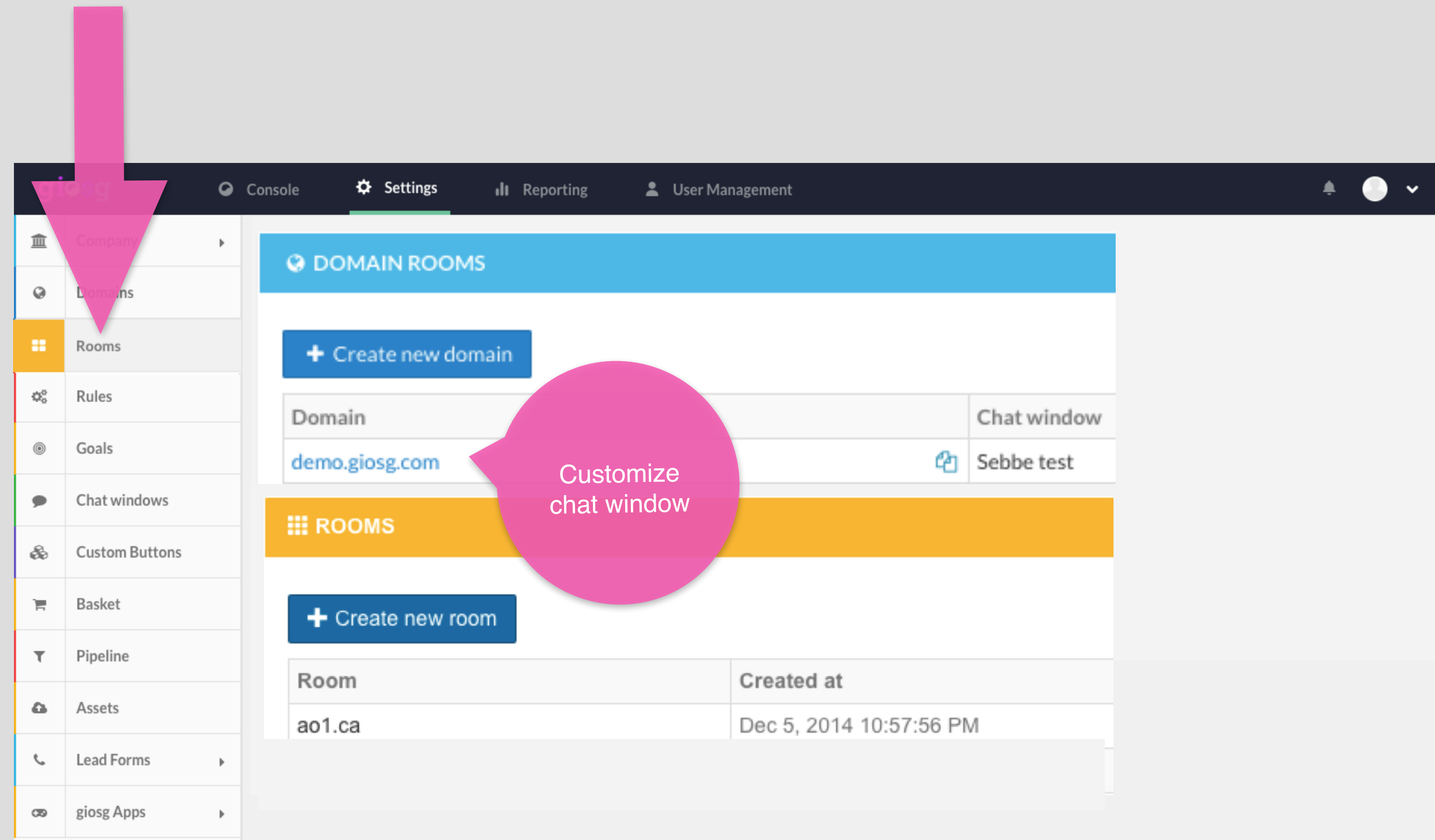
Editing the chat button

- You can edit the layout of the chat button easily with the chat button editor



Room Settings

- You can manage the settings for domain rooms, and custom rooms
- Custom rooms can be used to divide or combine your domains' traffic into sections.



The screenshot displays the giosg interface with the 'Settings' tab selected. The left sidebar contains a navigation menu with the following items: Company, Domains, Rooms (highlighted), Rules, Goals, Chat windows, Custom Buttons, Basket, Pipeline, Assets, Lead Forms, and giosg Apps. The main content area is divided into two sections: 'DOMAIN ROOMS' and 'ROOMS'. The 'DOMAIN ROOMS' section includes a '+ Create new domain' button and a table with the following data:

Domain	Chat window
demo.giosg.com	Sebbe test

The 'ROOMS' section includes a '+ Create new room' button and a table with the following data:

Room	Created at
ao1.ca	Dec 5, 2014 10:57:56 PM

A pink callout bubble with the text 'Customize chat window' is positioned over the 'Sebbe test' chat window in the 'DOMAIN ROOMS' table.

Customize the chat window for each domain

ROOM SETTINGS

Name
demo.giosg.com
You cannot change domain room name

Room ID
aus5thgylsgnzapbgmaae2x7t2jmx5ar4oiysusuac7aebam

Room UUID
6aff9e92-cbf4-11e3-9189-525400be0204

Connected domains
demo.giosg.com giosg.com
Domains where this room is allowed to work.

Language
Finnish

Router
demo.giosg.com

[+ Create Router](#) [Edit Router](#)

TRACKING SETTINGS

Enable tracking analytics events
Push Giosg event data to Google Analytics, Google Data Layer, or another analytics solution. See [documentation](#) for details.

Enable single page app (AJAX app) tracking
Enable single page application tracking. All changes in URL are considered to be page changes.

SECURITY AND ENCRYPTION

Always require signatures for visitor data and chat URLs
When this checkbox is enabled, then only data from trusted sources are saved. This means that the following functionality requires valid signatures using one of the organization's [API signing keys](#):

- Visitor variables saved to this room with JavaScript API must be signed. [Read more.](#)
- Mobile chat link to this room must be signed. [Read more.](#)

Encrypt chats and visitor information

Public key
Apn testiavain

CHAT SETTINGS

Chat window
Sebbe test [Edit](#) [+ New](#)
Manage all chat windows

Customize chat window title for this room
If you wish to override chat window title text for this room only, then you may check this option.

Open mobile chat in the same tab ⓘ
Note that this is an experimental feature and changes might be applied to it.

Brand
Testing brand editor
[+ Create Brand](#) [Edit Brand](#)

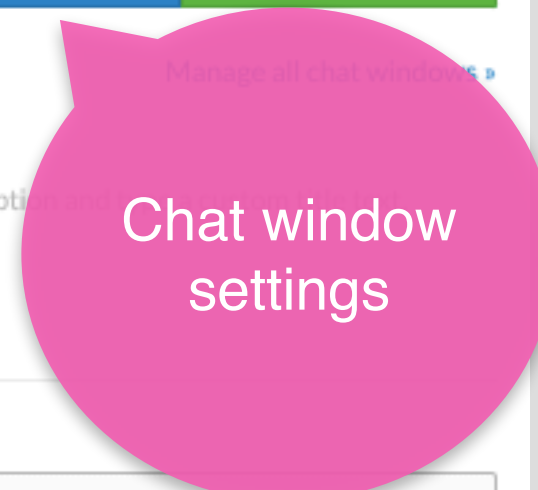
Auto suggest chat to visitor
Only with rules
The chat is suggested to a visitor only if there is a **giosg RULE** that enables the autosuggestion.
Note that even if enabled, autosuggestions are sent only if there is at least one operator online with free capacity!

Hide pending visitor chat messages

EDIT TAGS

Create a new tag
 [Add](#)

Current tags



Customize chat window and chat window settings

- From this view you can edit the chat window, texts, position, layout, etc.

The screenshot displays the Giosg chat window settings interface, which is divided into several sections:

- APPEARANCE** (Green header):
 - Title text:** giosg Chat
 - Styling:** Open style editor
 - Footer logo:** Select footer logo
 - The logo should be exactly 217 pixels wide and 37 pixels tall. Other sizes are allowed by customizing the chat window style.
- TEXTS** (Red header):
 - Language:** English
 - Message box text:** Type your message here..
 - Send button text:** Send
 - All operators offline text:** All chat agents are currently busy.
 - Operator is typing text:** Operator is typing..
 - Operator has typed text:** Operator has typed text
 - Visitor name:** You
 - This chat is no longer active text:** This chat is no longer active.
 - Disable autosuggestion text:** Do not contact me anymore.
- WINDOW POSITION** (Blue header):
 - Window position:** Bottom right
 - Fine-tuning:** 30 px (width) and 30 px (height)
- ANIMATIONS** (Orange header):
 - Showing animation:** (No animation)
 - Showing animation duration:** 400 ms
 - Hiding animation:** (No animation)
 - Hiding animation duration:** 400 ms
- Chat window name:** Ilkan Thinglink
- The chat window will be saved with this name. It is only visible to your company.
- Buttons:** Remove, Save and continue editing, Save and close

Callouts from the image:

- Customize chat window CSS and HTML** (points to Styling)
- Chat window title and logo** (points to Title text)
- Language and default settings** (points to Texts section)
- Position** (points to Window Position)
- Animations** (points to Animations)
- Rename the window and save** (points to Chat window name)

Room settings

Within room settings you can also:

- assign chatting operators to rooms with routers
- edit mobile chat window settings, create tags
- delete sensitive data
- enable service times
- edit tags

ROOM SETTINGS

Name
demo.giosg.com
You cannot change domain room name

Room ID
aus5thgylsgnzapbgmaae2x7t2jmx5ar4oiysusuac7aebam

Room UUID
6aff9e92-cbf4-11e3-9189-525400be0204

Connected domains
demo.giosg.com giosg.com
Domains where this room is allowed to work.

Language
Finnish

Router
demo.giosg.com

[+ Create Router](#) [Edit Router](#)

Select appropriate users to chat in this room

TRACKING SETTINGS

Enable tracking analytics events
Push Giosg event data to Google Analytics, Google Data Layer, or another analytics provider. [Read more for details.](#)

Enable single page app (AJAX app) tracking
Enable single page application tracking. All changes in URL are considered to be page changes.

Tracking settings

SECURITY AND ENCRYPTION

Always require signatures for visitor data and chat URLs
When this checkbox is enabled, then only data from trusted sources are saved. This means that the following functionality requires valid signatures using one of the organization's [API signing keys](#):

- Visitor variables saved to this room with JavaScript API must be signed. [Read more.](#)
- Mobile chat link to this room must be signed. [Read more.](#)

Encrypt chats and visitor information

Public key
Apn testiavain

Encryption of chats (requires giosg Vault)

CHAT SETTINGS

Chat window
Sebbe test [Edit](#) [+ New](#)
[Manage all chat windows](#)

Customize chat window title for this room
If you wish to override chat window title text for this room only, then you may check this option and type a custom title text.

Open mobile chat in the same tab [?](#)
Note that this is an experimental feature and changes might be applied to it.

Brand
Testing brand editor [+ Create Brand](#) [Edit Brand](#)

Auto suggest chat to visitor
Only with rules
The chat is suggested to a visitor only if there is a [giosg RULE](#) that matches the visitor's data.
Note that even if enabled, autosuggestions are sent only if there is a [giosg RULE](#) that matches the visitor's data with free capacity!

Hide pending visitor chat messages

Edit mobile chat window

EDIT TAGS

Create a new tag
 [Add](#)

Current tags

Edit tags for the categorization of chats

Room-settings

DELETE SENSITIVE DATA

Delete sensitive chat and lead data after X days

 days

Visitor details, chat messages, and lead contents will be deleted after 5 years.

NOTE:

- This setting will mark deletion time for ALL chats and leads in this room (including all existing chats and leads).
- All content with personal data (chat conversations, lead contents, and visitor details) will be removed. Other information may still be stored for reporting purposes.
- Deletion is permanent. Giosg cannot restore information.

Disable

Delete data
after a time
period

Service
hours for the
chat

SERVICE HOURS

Enable service hours

Timezone: Europe/Helsinki

Day	Open at	Close at
Monday	09:00	24:00
Tuesday	Service opening time	Service closing time
Wednesday	08:00	09:00
Thursday	09:00	09:45
Friday	08:00	13:15
Saturday	Service opening time	Service closing time
Sunday	Service opening time	Service closing time

Save changes

Save and close

Remove room

giosg RULES

Giosg RULES personalizes your online experience in real time.

With giosg RULES you can customize your messages and create intelligent rules on your website!

The screenshot displays the giosg RULES management interface. The top navigation bar includes the giosg logo and menu items for Console, Settings, Reporting, and User Management. The left sidebar contains a navigation menu with items: Company, Domains, Rooms, Rules (highlighted in red), Goals, Chat windows, Custom Buttons, and Basket. A large pink arrow points from the 'Rules' menu item to the main content area.

The main content area shows a list of rules for the domain `demo.giosg.com`. At the top right of this list is a button labeled '+ Create new rule'. Below this, three rules are listed:

- AUTOSUGGEST: First time visitor
- Enable chat button
- Show lead form

Each rule has a status toggle (green for on, red for off), a copy icon, and a delete icon. Four pink callout bubbles provide instructions:

- 'Click *'Create new rule'* in the desired room/domain' points to the '+ Create new rule' button.
- 'Enable/Disable a Rule' points to the status toggle for the 'Enable chat button' rule.
- 'Copy a rule' points to the copy icon for the 'Enable chat button' rule.
- 'Delete a rule' points to the delete icon for the 'Enable chat button' rule.

Creating a rule with giosg RULES

The screenshot shows the 'Rule name' configuration page. At the top, there is a text input field containing 'Name your rule' with a callout bubble that says 'Name the rule'. Below this is a toggle switch currently set to 'OFF' with a callout bubble that says 'Enable/Disable the rule'. To the right of the toggle is a dropdown menu set to 'Runs every time' with the text 'when conditions match'. Below these is a section titled 'Use in these rooms...' with a callout bubble that says 'Choose Room'. This section contains a search bar with 'demo.giosg.com' and an 'x' icon, and a checkbox for 'All rooms'. Below the search bar are two buttons: 'Add new condition' (green) and 'Activate Target' (dark grey). A callout bubble points to the 'Add new condition' button with the text 'Click 'Add new condition' and select suitable condition(s)'. Below the buttons is a section titled 'Perform this action' with a callout bubble that says 'Choose the action "What happens when the conditions are met?"'. This section contains a dropdown menu with the text 'Select action to perform'. Below the dropdown is a blue button with a plus sign and the text '+ Add another action'. At the bottom of the page, there is a dark grey footer with the text 'Rule is unpublished. You can save this rule but it won't go live until you publish it. [Publish the rule now.](#)' and two buttons: 'Save' (blue) and 'Back' (grey).

Giosg GOALS

With giosg GOALS you can monitor how your RULES are performing

The screenshot displays the Giosg GOALS configuration interface. On the left is a sidebar menu with the following items: Company, Domains, Rooms, Rules, Goals, Chat windows, Custom Buttons, Basket, Pipeline, and Assets. The main content area is titled "Goal" and includes a "New Goal" button. Below this is a text input field for "Describe this goal. It's for your own use only." followed by a section for "Assign a monetary value to the goal." with a "Goal value" input field. A callout bubble points to this section with the text "Name the Goal". Below that is the "Rooms" section, which has a radio button for "All rooms" and a "Pick rooms" input field. A callout bubble points to this section with the text "Choose the room where the Goal can be reached". The "Conditions" section is currently selected, showing a "When" condition type dropdown and an "Add condition" button. A callout bubble points to the "Add condition" button with the text "Add the goal". A light blue informational box on the right states: "Assigning a value to the goal helps you evaluate the goal against the costs of reaching it in our reporting. It also helps our AI to optimise the Actions for you. The goal value you write here will be overwritten by values we receive from your shopping cart integration or through goal API." At the bottom of the interface are "Save" and "Back" buttons.

Goal

New Goal

Describe this goal. It's for your own use only.

Assign a monetary value to the goal.

Goal value

Rooms

All rooms

The goal can be reached in following rooms

Pick rooms

Conditions

Add conditions to the goal. Goal is reached when all conditions match.

When

Select condition type

+ Add condition

Assigning a value to the goal helps you evaluate the goal against the costs of reaching it in our reporting. It also helps our AI to optimise the Actions for you. The goal value you write here will be overwritten by values we receive from your shopping cart integration or through goal API.

Save Back

Callouts:

- Name the Goal
- Choose the room where the Goal can be reached
- Add the goal

Giosg GOALS

After you have created the Goal you can see it in the Goals list and you can monitor it from the Rules & Goals section in the reporting

Goals + Create a new goal

Subscribed to newsletter Dec 16, 2016 5:09:17 PM

GOALS BY RULE			
	All treatments	AUTOSUGGEST: First time visitor	AUTOSUGGEST: 3rd visit
Total impressions	17,460	348	324
Sessions with impressions	2,537	348	324
Purchased carts	18	7	4
Goals reached			
Total goals reached	6	3	3
Subscribed to newsletter	6	3	3
Sales per currency			

Agenda

1
User management

2
Chat-settings

3
Reporting

4
Good to think about

Reporting

giosg Console Settings **Reporting** User Management

Realtime stats

Operators online: 7

Current chats: 2

Visitors currently: 11

Visitors today: 647

Today

Average wait time: 0:34

Max wait time: 2:41

Chats today: 6

Chats missed: 0

Shopping cart today

Total sales today: 0,00 €

Sales with chat: 0,00 €

Carts sold today: 0

Total chat conversion: 0,00 %

Average shopping cart: 0,00 €

Tags today

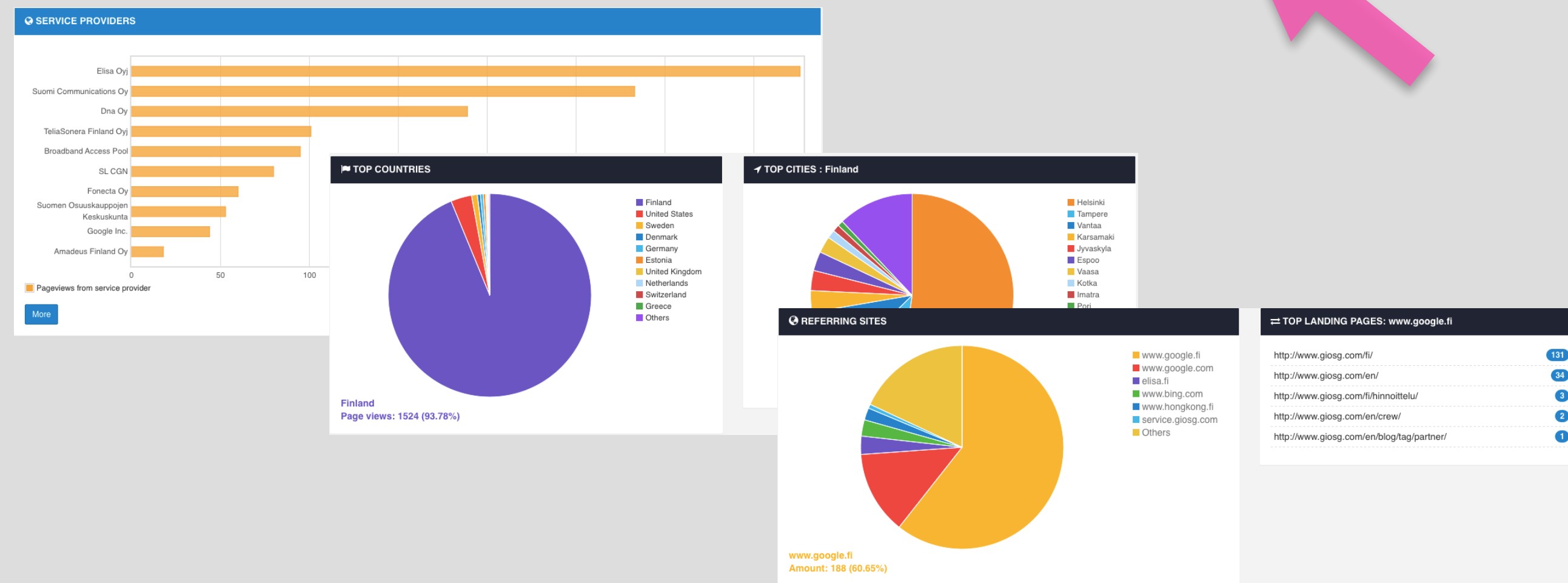
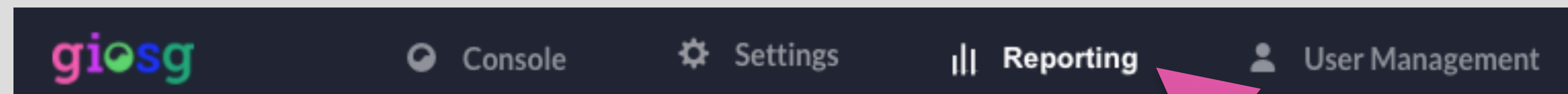
- #Account maintenance 2
- #Bug 1
- #CS Advice 1
- #Reports 1
- #demo 1

Operator stats Pause

Operator name ^	Current chats ^	Chats today v	Carts sold v	Sales today v	Conversion v	Time online v	Time present v	Time online % v
John Doe	0	0	0	0,00 €	0,00 %	0 min	0 min	0,00 %
Anna Smith	0	0	0	0,00 €	0,00 %	0 min	0 min	0,00 %
Peter Sullivan	0	0	0	0,00 €	0,00 %	0 min	0 min	0,00 %

Reports

- From the Reports page you can find statistics on your website visitors and the chat-service
- You can also export reports manually or send them automatically to your email



The Custom Reports interface shows the following options and settings:

- Real Time** (selected)
- Daily statistics**
- Sales**
- Leads**
- Operators**
- Visitors**
- Rules and Goals**
- Custom reports** (selected)

Custom reports section:

- Room: demo.giosg.com
- Period: May 24, 2018 - May 30, 2018
- Available reports: Chat logs (selected), Total statistics, Total statistics hourly, Leads
- Choose fields to export: Select all
- Deliver report: Download report now, Subscribe to email report
- Export options: XLSX, TXT

Filters:

- Only real chat conversations
- Chats with at least one message
- All the chats

Fields to export: active duration, apidata, average wait time before replies, chat duration, chat sales, chatlog, chatsession

Agenda

1
User management

2
Chat-settings

3
Reporting

4
Good to think about

1
Goals

2
Practices

3
Visibility

Good to think
about



Goals

What targets you want to achieve with chat?

Additional sales / leads / service efficiency

Set concrete goals

Monitoring!

While planning the strategy for sales-focused webchat, the company must decide what kind of visitor they want to reach, and at what stage of the buying process the visitor is contacted.

By focusing on the few most important goals, even a small chat team can achieve excellent results.



Practices

**Common code
of conduct**

**Sharing
experiences**

**Give feedback
and encourage
reaching new
goals!**

”A webchat is not useful for anyone if it is left unattended. When planning the allocation of resources for the webchat, it must be taken into account that the channel must be active when there are customers on the website ”

Visibility

**Personalise
the service**

Ensure
good
visibility of
the service

**Offer help
actively!**

**Inform customers
about the
service!**

”Part of the strategy planning is to decide the timing and content of a proactive chat message. This message should catch the target group's attention and start the conversation.

“It may be a good idea to activate the chat as soon as visitors see the price of the products they're looking for. This way, visitors can be gently nudged towards making a purchase decision and stopping price comparison.”

Thank you!

Visit our pages and we
can continue
discussing:

www.giosg.com



giosg