



## Chat Module

**Save time** and **boost your revenue** from satisfied customers by using ezSupport's Chat module to provide live customer support.

With Chat enabled on your help desk, your customers and support reps can communicate directly and immediately.

You can have Chat available during business hours and offline when no support reps are available. If a rep is not available for a chat session, customers can leave messages.

Chat sessions are automatically saved with your ezSupport customer contact records, so a customer's chat dialog can always be reviewed. You can also email chat session transcripts to customers for their reference.

Support reps can save frequently used replies and webpage URLs so they can be used to quickly populate chat responses.

Reps can also "push" webpages with helpful information to customers by including a URL in their chat response, so the webpage will appear on the customer's screen in a new browser window.

### **Price**

**FREE!**

## Chat Demo

**This demo illustrates a typical daily experience for both a customer and a support rep using ezSupport's Chat module to answer a question.**

**Site navigation displays at the top left corner of each demo page, indicating exactly where each step takes place in your ezSupport system.**

**[So let's get started!](#)**



### **Customer Experience**

Customer initiates chat. 2  
 Customer asks question. 3  
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### **Support Rep Experience**

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### Customer Has a Question

Our demo company is **AAA Golf**, a golf equipment and supplies retailer.

**Jan** is about to make a purchase on AAA Golf's website but first she wants to know whether she can pick up her order from AAA Golf's local store instead of having it shipped.

Luckily for Jan, AAA Golf uses ezSupport Chat, so she'll get her answer quickly.

### Here's how it works...

#### 1 Jan goes to AAA Golf's help desk

AAA Golf has links to their ezSupport help desk on their website, on all their eBay listings, and also in their customer emails. In fact, seeing the clear and easy access that AAA Golf provides for customer support had helped convince Jan to make her purchase from AAA Golf.

*Jan clicks AAA Golf's help button.*

#### 2 Jan decides to chat with AAA Golf

Jan sees a link to "Chat Live" on AAA Golf's help desk, and thinks chatting with a support rep would be a quick way to get her question answered.

*Jan clicks the "Chat Live" link.*

#### 3 Jan initiates her chat session

When Jan clicks the chat link, AAA Golf's customer chat window pops up with a screen to initiate her chat session. If no reps had been on duty, Jan would have seen a message to submit her question.

*Jan enters her first name, last name and her email address and then clicks the Begin Chat button.*

The screenshot shows the AAA Golf help desk interface. At the top left, there is a "Need HELP? click here" link with a small image of a woman's face, marked with a circled '1'. Below this is the AAA Golf logo and a search bar with the text "Ask a Question" and a "Search" button. To the right of the search bar is a "Powered by HOSTED SUPPORT" logo. Below the search bar is a "Question Topics" section with a list of categories: Items (5), Shipping (6), Payments (2), Returns (1), and Other (5). A "Chat Live" link is highlighted with a red arrow and a circled '2'. To the right of the topics is a section titled "Get answers right here, right now!" with the text "Select a topic at left or enter a question above to get started." Below this is a large blue-bordered box titled "AAA Golf Live Support". Inside this box, there is a "Welcome to our Live Support Help Desk." message, followed by the instruction "Enter your name and email to begin your chat session:". There are three input fields: "First Name" with the value "Jan", "Last Name" with the value "Brady", and "Email" with the value "janbrady@gmail.com". A "Begin Chat" button is located below the email field, marked with a circled '3' and a red arrow pointing to the right. At the bottom right of the chat initiation box is another "Powered by HOSTED SUPPORT" logo.

## Rep is Alerted to Chat & Accepts Session

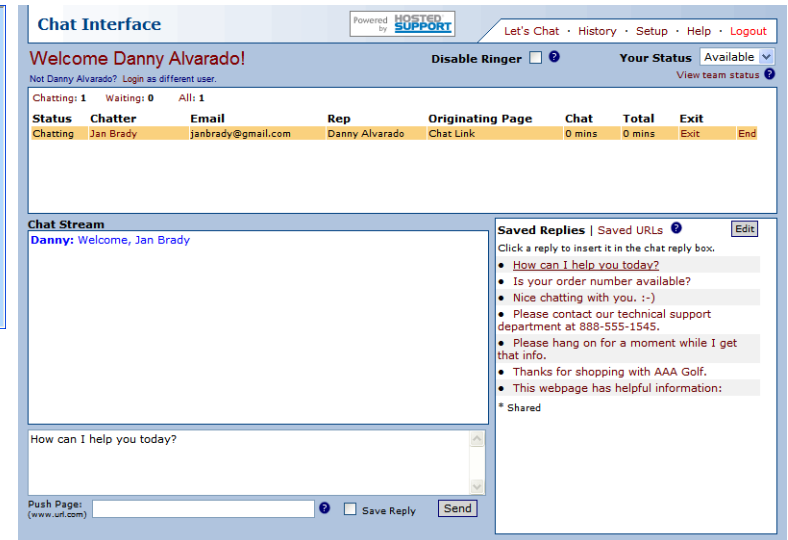
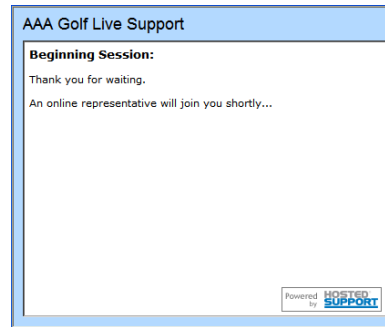
### Rep is alerted to Jan's chat

When Jan initiates her chat session, a message displays telling her that a rep will be with her shortly.

All AAA Golf support reps that have their chat admin window open with status set to "Available" are immediately alerted by their chat admin page flashing to the top of their browser windows, and (if using Internet Explorer) by a ring tone.

AAA Golf rep **Danny** is currently the only rep available. Reps can see who is available or offline by clicking the "View team status" link. If multiple reps are available, then any rep can accept a chat session. Reps can pass control of chat sessions to each other, and a rep can handle multiple chat sessions simultaneously if necessary.

*Danny accepts Jan's chat by clicking her name in his chat queue window.*



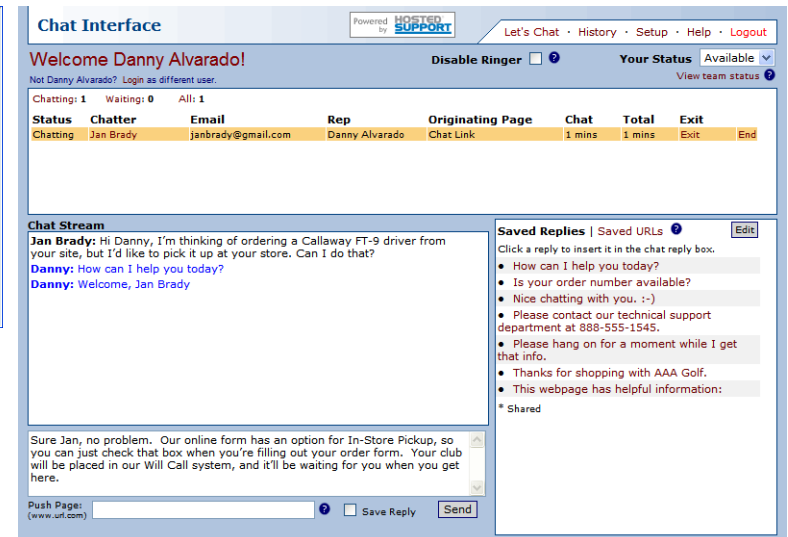
### Danny and Jan chat

Danny then quickly responds to Jan by selecting his saved reply "How can I help you today?"

When Danny accepts Jan's chat session, Jan immediately sees a welcome message, and then sees Danny's initial reply as soon as he sends it.

Danny and Jan then chat back and forth, and Jan is happy to hear that she can pick up her purchase at AAA Golf's store the next day.

The entire chat stream displays continuously for both Danny and Jan.



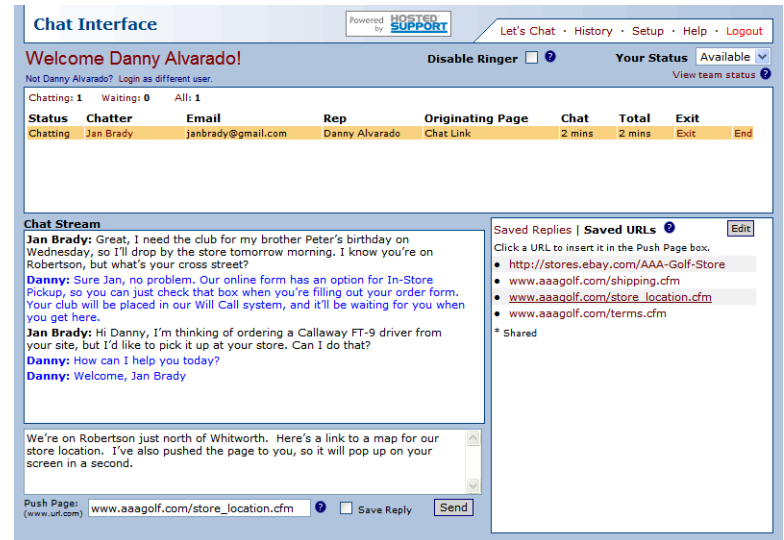
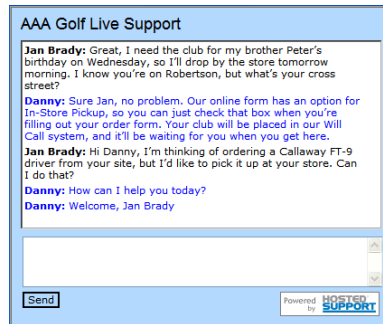
## Rep Pushes Page to Customer

### Danny pushes webpage to Jan

After Danny gives Jan instructions about how to select the in-store pickup option for her online order, Jan asks for specifics about where AAA Golf's store is located.

Danny tells Jan the location of AAA Golf's store, but then goes the extra mile. As part of his response Danny pushes a webpage to Jan with a map to AAA Golf by including the page URL in the chat "Push Page" box.

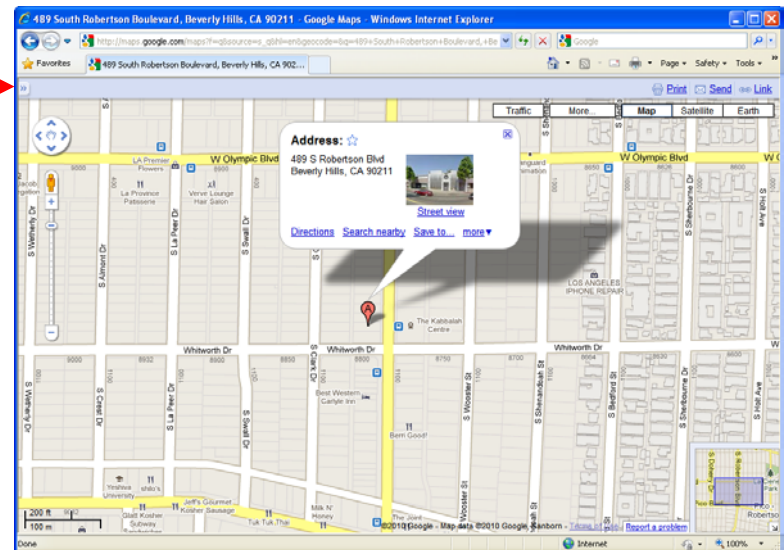
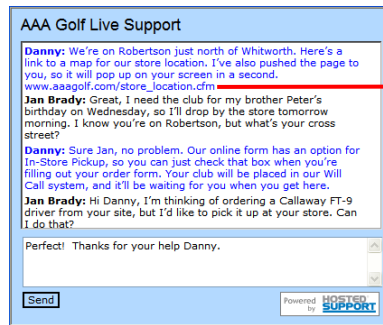
It was easy for Danny to do this because he had the map webpage URL in his list of Saved URLs, so he was able to quickly insert the URL with his response.



### Jan receives the pushed webpage

Momentarily after receiving Danny's reply, the webpage with a map to AAA Golf's store pops up on Jan's screen in a new browser window. That was exactly what Jan needed!

Jan is very impressed and couldn't be happier with AAA Golf's superior customer service.



## Rep Emails Chat Transcript to Customer

### Danny emails Jan her chat transcript

With her question answered, Jan ends her chat session by closing her chat window and immediately places her order on AAA Golf's website.

Danny wants to make sure that Jan has a record of their chat just in case she needs to refer to the URL with the map to AAA Golf's store location. So Danny emails Jan a transcript of their chat.

It's easy for Danny to do this. He just brings up Jan's chat session record under the History tab where all chat records are saved. Danny clicks the email link on Jan's chat record, and an email page comes up with Jan's email and chat session transcript pre-filled. Danny clicks the Send button, and Jan's chat transcript is immediately sent to her.

Jan is even more impressed with AAA Golf when she receives her transcript. That other golf retailer she's done business with is never this professional or easy to communicate with.

**Chat History**
Powered by 
Let's Chat · **History** · Setup · Help · Logout

Date Range: 07/01/10 - 07/31/10    Sort by: Date Descending

View	Date	Time	Chatter	Email	Rep	Wait	Chat	Total
	07/20/10	2:42P	Brady, Jan	janbrady@gmail.com	D. Alvarado	0 min	3 min	3 min

[Email this chat session](#)

Date	Time	Chatter	Message
07/20/10	2:42P	Danny Alvarado	Welcome, Jan Brady
07/20/10	2:43P	Danny Alvarado	How can I help you today?
07/20/10	2:43P	Jan Brady	Hi Danny, I'm thinking of ordering a Callaway FT-9 driver from your site, but I'd like to pick it up at your store. Can I do that?
07/20/10	2:43P	Danny Alvarado	Sure Jan, no problem. Our online form has an option for In-Store Pickup, so you can just check that box when you're filling out your order form. Your club will be placed in our Will Call system, and it'll be waiting for you when you get here.
07/20/10	2:44P	Jan Brady	Great, I need the club for my brother Peter's birthday on Wednesday, so I'll drop by the store tomorrow morning. I

To:

From:

Subject:

Message: 

**Date of chat session: 07/20/10**  
**CSR: Danny Alvarado**

**Danny Alvarado:** Welcome, Jan Brady  
**Danny Alvarado:** How can I help you today?  
**Jan Brady:** Hi Danny, I'm thinking of ordering a Callaway FT-9 driver from your site, but I'd like to pick it up at your store. Can I do that?  
**Danny Alvarado:** Sure Jan, no problem. Our online form has an option for In-Store Pickup, so you can just check that box when you're filling out your order form. Your club will be placed in our Will Call system, and it'll be waiting for you

Normal / HTML    ActivEdit 5.0 © 1999-2008

### Chat Session is Archived

In addition to Jan's chat session being available in the Chat admin under the History tab, it will also be archived to Jan's ezSupport contact record where it can always be referred to in the future.

Jan automatically created her ezSupport contact record when she submitted her name and email address to initiate her chat session. But if Jan had already had a contact record in AAA Golf's ezSupport account, then her chat would have been saved to her existing record.

**And that's how ezSupport's Chat works!**

The screenshot shows the 'Contact Manager' interface. At the top, there are navigation tabs: 'Support Center', 'Tools', 'Configuration', 'Company Profile', and 'View Your Help Desk'. Below these are sub-tabs: 'Summary', 'Messages', 'Tickets', 'Returns', 'Contact Manager', 'Calendar', and 'Chat'. A search bar is present with a dropdown menu and a 'Submit' button. The main content area has a 'Contacts' header with a sub-tab 'Accounts'. Below this is a 'Contact Information' header with sub-tabs: 'Messages', 'Tickets', 'Returns', 'Chat Log' (highlighted with a red box), 'Notes', and 'Calendar/Activities'. There are also 'Manage Tabs' for 'New Contact', 'Duplicate Contact', 'Delete Contact', 'Schedule Activity', 'Priority Routing', and 'All Contacts'. The contact details form includes fields for: First Name (Jan), Last Name (Brady), Address 1 (11222 Dilling Street), Address 2, City (Studio City), State (California), Region, Country, Zip (91604), eBay ID (janbradyforever), Email (janbrady@gmail.com), Account, Company, Daytime Phone (310.234.5678), Evening Phone, Mobile Phone, Fax, Contact ID, and Status (Active). An 'Update' button is at the bottom.

The screenshot shows the 'Chat Log' table for contact Jan Brady. The table has columns: Date/Time, Chatter, Email, CSR, Originating Page, Wait, Chat, and Total. The data row shows a chat session on 07/20/10 at 2:42P with Chatter 'Brady, Jan', Email 'janbrady@gmail.com', CSR 'D. Alvarado', Originating Page 'Chat Page', Wait '0 min', Chat '3 min', and Total '3 min'.

Date/Time	Chatter	Email	CSR	Originating Page	Wait	Chat	Total
07/20/10 2:42P	Brady, Jan	janbrady@gmail.com	D. Alvarado	Chat Page	0 min	3 min	3 min