




INDITION CHAT

# FAQ & Troubleshooting

Common questions and fixes for agents and administrators,  
with a symptom-based troubleshooting index.

Chat Module · Version 1.0 · June 2026

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# Indition Chat — FAQ & Troubleshooting

Quick answers to common questions and fixes for the issues teams hit most. Organized by audience: agents first, then administrators, then a symptom-based troubleshooting index.

If a fix here doesn't resolve the problem, note what you were doing, your role, the site involved, and any on-screen message, and contact your Chat administrator.

## General

### WHAT IS INDITION CHAT?

It's the live-chat product inside the Indition platform: an embeddable website widget, a real-time agent console, visitor tracking, email follow-up, team management, and reporting — all sharing the platform's customer records.

### DO I NEED A SEPARATE LOGIN OR TOOL?

No. Chat is a module of the Indition platform. You use the same account, and conversations attach to the same contacts and visitors as the rest of the platform.

### WHAT'S THE DIFFERENCE BETWEEN A "VISITOR", A "CONTACT", AND A "CONVERSATION"?

A **visitor** is someone browsing one of your sites (anonymous or identified). A **contact** is the platform customer record. A **conversation** is a single chat or email thread. One visitor can have many conversations and may be linked to a contact.

### DOES CHAT KEEP WORKING OUTSIDE BUSINESS HOURS?

Yes. When no operator is available or you're outside configured business hours, the widget shows an offline form. Submissions land in the **Email Follow-ups** queue so nothing is lost.

# For agents

## I'M NOT RECEIVING ANY NEW CHATS. WHY?

Receiving chats requires **two** things at once:

1. Your status is set to **Available** in the top bar.
2. Chat is **open in your browser** (active presence).

If either is missing, you won't get chats. Also confirm you're **assigned to the site** the visitor is on — agents only see chats for their assigned sites.

## I SET MYSELF AVAILABLE BUT MANAGERS STILL SEE ME AS UNAVAILABLE.

Your *effective status* depends on your sites. If all your assigned sites are inactive or outside business hours, you'll read as *unavailable* even with your toggle on. If you have no site coverage at all, you'll read as *no site access* — ask an admin to assign you to a site.

## I CLICKED A WAITING CHAT BUT GOT "TAKEN BY ANOTHER AGENT".

That's expected. When several agents grab the same chat, only the first to claim it wins. Pick another waiting chat.

## CAN I EDIT A MESSAGE AFTER SENDING IT?

You can edit your own most-recent reply or internal note; it will show an "Edited" marker. You cannot edit customer messages, system messages, email replies, or any message in an ended conversation.

## THE VISITOR DISAPPEARED MID-CHAT.

Visitors can close the tab or lose connection. There's a short grace period; if they don't return, the conversation ends automatically. Idle conversations also auto-close after a configured time. Their history remains on the visitor record.

## WHERE DID MY CANNED RESPONSE GO / WHY DON'T I SEE ONE I EXPECT?

The composer shows global active responses plus active responses scoped to *this conversation's site*. If a response is Inactive, or scoped to a different site, it won't appear. Managers/admins manage these on the Canned Responses page.

## I DON'T SEE THE REPORTS, TEAM, OR SITES MENUS.

Those are role-gated. Agents don't see reports, team availability, site management, or visitor admin. External agents see reports and visitors scoped to their sites but still can't manage sites. If you need access, that's a role change from an admin.

## WHY DON'T I HEAR A SOUND OR SEE DESKTOP POP-UPS?

Check Settings → Notifications: enable sound alerts and browser notifications. Browser notifications also require granting permission to the site in your browser (you're prompted once; if you dismissed it, re-enable in browser settings). Note: while you're *unavailable*, new-chat alerts are suppressed, though alerts for your own conversations still play.

# For administrators

## THE WIDGET ISN'T APPEARING ON OUR WEBSITE.

Work through these in order:

- **Snippet installed?** The loader `<script>` must be on the page (before `</body>`). Use **Verify Install** on the site to confirm it's been seen.
- **Domain allow-listed?** The page's domain must be in the site's allowed domains. The widget refuses to run elsewhere.
- **Correct site key?** The snippet's `site_key` must match the site.
- **Chat and widget enabled?** Both the global Chat toggle and the widget runtime must be on, and the site must be active.

## VISITORS ONLY EVER SEE THE OFFLINE FORM.

Live chat shows only when all of these are true: Chat enabled, widget enabled, site active, within business hours, and at least one assigned operator available. The most common cause is no available operator (status off or Chat tab closed) or business hours excluding the current time.

## HOW DO I ADD AN AGENT TO A SITE?

On the site's team, use **All Users** (every agent/manager, plus explicitly named external agents) or **Specific Users** to list people. Remember: "All Users" does *not* include external agents — assign them explicitly.

## AN EXTERNAL AGENT CAN'T SEE SOMETHING THEY SHOULD.

External agents are restricted to explicitly assigned sites and cannot manage sites, manage canned responses, see team availability, or export transcripts. Confirm the site assignment is explicit (not relying on "All Users").

## HOW DO I BLOCK AN ABUSIVE VISITOR?

Settings → Banned IPs. Add the IP with a scope (account-wide or a specific site), a duration, and notes. Bans are enforced across all public widget endpoints. IP resolution is proxy-aware (it reads forwarded headers before the raw address).

## HOW DO OFFLINE MESSAGES GET ANSWERED BY EMAIL?

Configure email delivery (Settings → Email Delivery, or per site): bind a **shared mailbox** (via MailboxSuite) so outbound replies send through it and inbound customer replies sync back into the conversation; or set a **fallback email** destination. If neither is set, delivery is marked not-configured.

## **CONVERSATIONS ARE CLOSING TOO SOON / STAYING OPEN TOO LONG.**

Tune *Conversation TTL Minutes* (default 5) and *Visitor Session Idle Minutes* (default 30) in General Settings. Auto-close is evaluated from the last message — a conversation with recent activity is never auto-closed.

## **CAN I REMOVE THE "POWERED BY INDITION" BRANDING?**

Yes — each site has a remove-branding toggle in its customization settings.

## **REAL-TIME UPDATES SEEM LAGGY.**

Real-time delivery needs the realtime setting enabled and a healthy gateway; otherwise the console falls back to polling (a few seconds' delay is normal in fallback). If live updates never arrive, confirm the realtime toggle in General Settings and that the realtime gateway/Node server is running.

# Troubleshooting index

Symptom	Likely cause & fix
No new chats reaching an agent	Status not Available, Chat tab closed, or agent not assigned to the site.
Agent reads as unavailable to managers	All assigned sites inactive/outside hours, or no site coverage.
"Taken by another agent"	Claim conflict — someone claimed it first. Pick another chat.
Widget missing on site	Snippet not installed, domain not allow-listed, wrong site key, or Chat/widget disabled.
Only the offline form shows	No available operator, or outside business hours.
Expected canned response missing	Inactive, or scoped to a different site.
No sound / desktop alerts	Notifications disabled, browser permission not granted, or agent unavailable.
Offline replies not delivered	Email delivery not configured (no shared mailbox or fallback email).
Inbound email replies not syncing	Using fallback email instead of a bound shared mailbox (fallback doesn't sync inbound).
Conversations auto-closing unexpectedly	Conversation TTL too short — raise it in General Settings.
Can't edit a message	Not your message, it's an email/system message, or the conversation has ended.
Menus (Reports/Team/Sites) missing	Role-gated — needs a manager/admin role or scoped external-agent access.
Real-time updates delayed	Realtime disabled or gateway down — console is in polling fallback.
Duplicate or anonymous visitors in the feed	Identity not yet reconciled; resolves/merges as the visitor is identified.

## Still stuck?

Gather: your role, the affected site, the conversation or visitor involved, what you expected vs. what happened, and any exact error text. Admins can additionally check that module migrations and OAuth sync ran, the realtime gateway is up, and the auto-close cron is scheduled. Then contact your Indition administrator or support contact.