




INDITION CHAT

# Feature List

A structured catalogue of every capability in the Chat module — widget, console, visitor intelligence, email follow-up, team, reporting, and platform.

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# Indition Chat — Feature List

**Indition Chat** is the live-chat and conversational support product built into the Indition platform. It combines an embeddable website widget, a real-time agent console, visitor tracking, email follow-up, team management, and operational reporting into one connected module — the same site, visitor, conversation, and message records drive every surface.

This document is a structured catalogue of what Chat does, grouped by functional area. Each area lists the capabilities that ship in the current module. Use it as a coverage map, a sales/requirements checklist, or an index into the User Manual and Technical Reference.

## At a glance

Area	What it delivers
Website widget	Embeddable, customizable live-chat box + hosted chat page, with offline fallback.
Agent console	Real-time conversation workspace, queues, tabs, and a work bar for incoming chats.
Visitor intelligence	Live visitor monitoring, geolocation, browsing history, identity reconciliation.
Email follow-up	Offline messages and email-style conversations, optionally via shared mailbox.
Team & availability	Two-factor availability, team roster, per-site coverage, auto-routing.
Productivity	Canned responses, internal notes, message editing, attachments, transcripts.
Reporting	Overview, team, site, and queue performance reports with CSV export.
Administration	Multi-site management, four-role access model, settings, banned-IP moderation.
Platform	Real-time delivery (WebSocket + polling fallback), multi-tenant, platform-integrated.

# 1. Website widget & visitor experience

## EMBEDDABLE CHAT WIDGET

- Single-line install snippet (async `<script>`) keyed to a public **site key**.
- Floating launcher button + in-page iframe chat box, injected by a hosted loader.
- Domain allow-list — the widget only runs on domains registered for the site.
- **Hosted chat page** — a standalone full-page chat at a per-site slug, with optional hero/headline section, for sites that prefer a link over an embed.
- Install verification — detects whether the widget is live and reports last-seen URL and time.

## CUSTOMIZATION (PER SITE)

- **Launcher**: icon + text, icon only, or text only; choice of launcher icon.
- **Appearance**: launcher, header, body, message-bubble, and send-button colours (hex entry + colour picker).
- **Conversation copy**: state-specific title/subtitle for before-chat, chatting, after-chat, and unavailable states.
- **Dynamic header**: show *"Chat with <agent first name>"* once a conversation is claimed.
- **Pre-chat form**: configurable name, email, phone, and message fields with per-field show/require rules.
- **Triggers**: auto-open on mobile, show once per session, reopen after N minutes.
- **Branding**: optional "Powered by Indition" footer (can be removed per site).
- Desktop and mobile **live preview** with state switching while editing.

## VISITOR-FACING FEATURES

- Real-time messaging with typing/agent updates; long-poll fallback when WebSocket is unavailable.
- File attachments from the visitor, validated by size and extension.
- **Offline mode**: email submission form when no operator is available.
- **Transcript request**: visitor can request a copy of the conversation.
- **Post-chat rating & feedback**: 1–5 rating with optional comment; copy configurable per site.
- Persistent visitor session that survives tab close (configurable reset behaviour).

## 2. Agent console & conversations

### QUEUES & INBOXES

- **My Conversations** — chats currently owned by the signed-in operator.
- **Active Conversations** — the shared live queue of waiting chats.
- **Email Follow-ups** — offline/email-style work, separated from live routing.
- **Past Conversations** — resolved and closed conversations (chat and email).

### CONVERSATION WORKSPACE

- Message timeline with compact/relative timestamps and visitor/agent/system message types.
- Rich-text reply composer (bold, italic, lists, links) preserved in HTML transcripts.
- **Internal notes** — team-only messages never shown to the visitor.
- **Canned response** insertion from the composer (global + site-specific responses).
- Attachment upload with inline image thumbnails; document download/preview.
- **Customer context panel**: name, email, phone, IP, current page.
- **Location map** — visitor geolocation from IP (Google Maps).
- **Visitor history** — browsing sessions and page-view timeline.
- **Conversation history** — prior chats with the same visitor.
- Real-time connection indicator and post-chat rating display.

### CONVERSATION ACTIONS

- **Claim / auto-claim** unassigned conversations.
- **Assign** a conversation to another operator **MANAGER/ADMIN**.
- **Take over** a conversation from another operator **MANAGER/ADMIN**.
- **Reply with assigned agent** — public reply without changing ownership **MANAGER/ADMIN**.
- **End chat / close email** — closes the conversation and disables the composer.
- **Edit sent messages** — edit your own replies and notes; shows an "Edited" marker.
- **Export transcript** — PDF, Text, HTML, or all formats **MANAGER/ADMIN**.
- Claim-conflict protection — only the first operator to grab a chat succeeds.

### WORK BAR & TRAYS

- **Incoming Chats** bar with "Waiting Xm" wait badges; one click claims and opens.
- **My Chats** tray with "N new" unread badges for assigned conversations.
- **Incoming toasts** with sound, mute toggle, conflict messaging, and urgent escalation styling after long waits.
- Tabbed conversations with needs-reply / unread / ended / new-activity states.

# 3. Visitor intelligence

## LIVE MONITORING

- **Active Visitors** grid — everyone on your sites within the recent activity window (~30 min), with current page, time on site, visit count, source, conversation status, and assigned agent.
- **Visitors-by-Site** chart — visitor volume over time per site, with range presets (today / yesterday / week / month / custom) and time-block granularity (10/15/30/60 min).
- **Live counts** — active conversations, waiting for agent, unread by agents, oldest waiting.
- **Visitor drawer** — slide-out panel with a visitor's detail and history from any list.

## VISITOR RECORDS

- Visitor profile: name, email, phone, external IDs, status, first/last seen.
- Total conversation and session counts; full conversation history.
- Browsing sessions with per-page time spent and visit grouping.
- **Contacts workspace** — contact-record view with conversations, visitors/devices, and browsing tabs.

## IDENTITY RECONCILIATION

- Stable anonymous label "*Visitor - <short-id>*" until identified.
- Identity resolution from persisted visitor key, optional FingerprintJS Pro ID, explicit contact data, and (short-window) IP + user agent.
- **Visitor merging** — anonymous-to-identified upgrades and multi-browser identities merge to one surviving record.
- Duplicate suppression in the active-visitor feed.
- **Page-visit fragment collapsing** — raw page rows are aggregated into clean per-page entries for agents.

## 4. Email follow-up & offline

- **Offline submissions** — captured when no operator is available and routed to the Email Follow-ups queue.
- **Chat-to-email conversion** — a live chat can continue as email-style follow-up.
- **Email-specific status labels**: Open, Pending Email Reply, Awaiting Customer Reply, Resolved, Closed.
- **Email composer**: subject, reply-all, To/CC/BCC participants, plain-text and HTML.
- **Shared mailbox delivery** (via MailboxSuite) — outbound through a bound mailbox; inbound customer replies sync back into the conversation; attachment bridging.
- **Fallback email** — a destination address per site for offline submissions when no mailbox is bound.
- Lower-urgency notification treatment (badge counts, not live sound/toast).

## 5. Team, availability & routing

- **Two-factor availability** — operator must be set *Available* **and** have the Chat app open (active presence) to receive chats.
- **Availability bar** — change status globally or per site from the top bar, with real-time sync.
- **Effective status** — single resolved status (available / unavailable / no-site-access) across assigned sites.
- **Team Availability page** MANAGER/ADMIN — roster with role, global vs. effective status, active chat count, assigned/available site counts, last update, and filters.
- **Per-site coverage** — agents are scoped to assigned sites ("All Users" or "Specific Users" modes; external agents always explicit).
- **Auto-close** — idle conversations close automatically after a configurable TTL, with a disconnect grace period.

## 6. Productivity & messaging

- **Canned responses** — reusable reply templates with title, optional shortcut, body, active/inactive status, and All-Websites or per-site scope **MANAGER/ADMIN TO MANAGE**.
- **Internal notes** — collaborate privately within a conversation.
- **Message editing** — edit your own replies/notes with an audit trail and "Edited" marker; widget reflects edits.
- **Attachments** — agent and visitor file uploads with validation; inline image rendering.
- **Transcripts** — export in PDF / Text / HTML; visitor-requested transcripts.

## 7. Reporting & analytics

- **Overview** — summary metrics plus conversations-per-day and average-response-time trends.
- **Team Performance** — per agent (or per website): chats handled, positive/negative ratings & %, average duration, average response time, missed chats; CSV export.
- **Site Performance** — per site: conversations, unique visitors, active conversations, missed chats, average duration/response, sentiment %.
- **Queue Performance** — per queue: conversations, open, waiting, resolved, closed, missed, averages, sentiment.
- Shared filters: date range, website, team member, include disabled users, group-by (user/website), queue.

## 8. Administration & access

- **Multi-site management** — create, edit, toggle, duplicate, and verify sites; per-site widget config, domains, team, business hours, and email delivery.
- **Four-role access model**: Chat Admin (all sites, all settings), Chat Manager (assigned sites + team oversight), Chat Agent (answer chats on assigned sites), External Chat Agent (assigned sites + scoped reports/visitors).
- **Settings**: general (enablement, real-time, default messages, business hours, TTLs, reset policy), email delivery, notifications, banned IPs.
- **Notification preferences** — browser notifications, sound alerts per event, play-in-background, visitor notification rules, and quiet hours.
- **Banned-IP moderation** — account- or site-scoped bans with duration, notes, block counts, and unban; enforced across all public widget endpoints; proxy-aware IP resolution.
- **Navigation** — role-aware menus; agents, external agents, managers, and admins each see a tailored menu.

## 9. Platform & integration

- **Real-time delivery** — WebSocket events over a shared realtime gateway (Redis pub/sub), with scoped JWT tokens and automatic polling fallback.
- **Multi-tenant** — site-prefixed tables and per-instance channel namespacing.
- **Platform integration** — contacts, shared mailboxes (MailboxSuite), and platform OAuth access groups.
- **Public widget API** — bootstrap, start, send, poll, heartbeat, offline, transcript, rating, and realtime-token endpoints, plus loader/frame/hosted asset delivery.
- **Automation** — scheduled auto-close command; migration and OAuth-sync CLI tooling.