indition™

INDITION CHAT

User Manual

A practical guide for agents, managers, and administrators — what each screen does and how to get work done.

Chat Module · Version 1.0 · June 2026

Indition Chat — User Manual

> A practical guide for the people who **use** Chat every day — agents, managers, and administrators. It explains what each screen does and how to get work done, not how the system is built.

Indition Chat is the live-chat product inside the Indition platform. Your team can talk to website visitors in real time, follow up by email when chats go offline, see who is on your sites right now, and measure team and site performance.

Who does what

Role	In one line
Chat Agent	Answers visitor chats on the sites they are assigned to.
External Chat Agent	Like an agent, restricted to assigned sites; can view reports and visitors for those sites but cannot manage sites or see higher-role teammates.
Chat Manager	Oversees a team on their sites — assigns and takes over chats, watches coverage, reads reports.
Chat Admin	Full control — creates sites, installs the widget, configures everything, sees all sites.

Get started in five minutes

1. **Go available.** Open Chat and set your status to *Available* in the top bar. You must also keep Chat open in your browser (active presence) to receive chats.
2. **Watch for work.** New chats appear in the **Incoming Chats** bar and the **Active Conversations** queue.
3. **Claim a chat.** Click an incoming chat to take ownership and open it.
4. **Reply.** Type in the composer, add canned responses or attachments, and send. Use internal notes to talk to teammates privately.
5. **End it.** Close the conversation when finished. Check **Email Follow-ups** for any offline work.

Key terms

Term	Meaning
Site	One website/domain where the widget runs. Sites organize everything else.
Active visitor	Someone on a site within roughly the last 30 minutes — they need not have an open chat.
Queue	A named bucket conversations route into (e.g. "Support").
Claim	Take ownership of an unassigned conversation.
Internal note	A team-only message, never shown to the visitor.
Missed chat	A conversation that timed out or went unanswered.
Auto-close	Idle conversations close automatically after a set time.

1. Roles & access

What you can see and do in Chat depends on your role and on which **sites** you are assigned to. There are four roles.

CHAT AGENT

- Answers chats on assigned sites: claim, reply, add internal notes, insert canned responses, attach files.
- Manages their own availability and notification preferences.
- Cannot assign or take over chats, view reports, manage sites, or see managers/admins in team lists.

EXTERNAL CHAT AGENT

- Everything an agent can do, on explicitly assigned sites only (the "All Users" shortcut does *not* include external agents).
- Additionally can view reports and the visitor/contact workspace, scoped to assigned sites.
- Cannot see team availability, manage sites, manage canned responses, or export transcripts.

CHAT MANAGER

- Oversees a team on assigned sites: assign, take over, and reply-with-assigned-agent.
- Views reports, team availability, and visitors for those sites; can manage assigned sites and canned responses.
- Cannot create new sites or change global configuration the way an admin can.

CHAT ADMIN

- Full control over all sites: create/delete sites, install the widget, configure every setting.
- Manages the team, assigns conversations, reads all reports, and configures notifications and banned IPs.

Site access & visibility

- Each site has a team. In **All Users** mode every agent and manager is included automatically; external agents still need explicit assignment. In **Specific Users** mode only the people you list can work that site.
- Agents and external agents see only agent-level peers — never managers or admins — in team lists.
- Scope is applied everywhere consistently: inbox, conversations, visitors, reports, and exports.

2. Handling conversations

The four queues

Queue	What it holds
My Conversations	Chats you currently own.
Active Conversations	The shared live queue of waiting chats on your sites.
Email Follow-ups	Offline submissions and email-style work (covered in chapter 4 of the feature set).
Past Conversations	Resolved and closed conversations, for review.

How chats reach you

- The **Incoming Chats** bar shows unassigned waiting chats with a *"Waiting Xm"* badge. Click one to claim and open it.
- The **Active Conversations** queue lists the same waiting chats as a full grid.
- The **My Chats** tray shows your assigned conversations and flags unread customer messages with a *"N new"* badge.
- Incoming toasts can play a sound and raise a browser notification (see chapter 8). They escalate visually if a chat waits a long time.

The conversation workspace

Opening a conversation gives you three regions:

- **Timeline** (centre) — every message in order, with compact timestamps. Visitor messages, your replies, internal notes, and system events are visually distinct.
- **Context panel** (side) — the customer's name, email, phone, IP and current page; a location map; their browsing history; and their previous conversations with you.
- **Composer** (bottom) — where you write replies.

REPLYING

- Type in the rich-text composer (bold, italic, lists, links). Press send to deliver.
- **Canned responses**: open the Quick Response dropdown to insert a saved template, then edit before sending. You see global responses plus any specific to this conversation's site.
- **Attachments**: upload a file with your reply. Images show as inline thumbnails.
- **Internal notes**: switch the composer to note mode to leave a team-only message. The visitor never sees notes.

- **Edit a message**: you can edit your own most-recent reply or note. It will show an "Edited" marker. (Customer and system messages, email replies, and messages in ended conversations cannot be edited.)

TRANSFERRING & COLLABORATING MANAGER / ADMIN

- **Assign** — hand ownership to another operator.
- **Take over** — claim a chat currently owned by someone else.
- **Reply with assigned agent** — post a public reply without changing who owns the chat.

> **Claim conflicts:** if two people grab the same waiting chat, only the first succeeds; the other sees a "taken by another agent" message. Ended conversations can't be claimed, taken over, or reassigned.

ENDING & EXPORTING

- **End chat** closes the conversation and disables the composer. It then appears under Past Conversations.
- **Export transcript** MANAGER / ADMIN — download as PDF, Text, HTML, or all formats.

3. Availability & team coverage

Being available is two things

1. **Status** — your *Available / Unavailable* toggle in the top bar.
2. **Active presence** — Chat must be open in your browser.

You only receive new chats when **both** are true. You can also set availability per site if you cover more than one.

> **Effective status** is the single status shown to managers. It reads *available* if at least one of your assigned, active sites is open; *unavailable* if all are closed; and *no site access* if you have no site coverage.

Team Availability page MANAGER / ADMIN

Agents do not see this page. Managers and admins use it to monitor coverage:

- Summary counts: available, unavailable, no-site-access, and active conversations.
- Per-operator rows: role, global status, effective status, active assigned chats, assigned vs. available site counts, and last availability update.
- Click an operator's site count to see exactly which sites they cover.
- Filter by site, role, or status, or search by name.

COVERAGE TIPS

- If a site shows no available operators, customers see the offline/email form instead of live chat.
- Agents appear available only when their status is on *and* Chat is open — remind staff to keep the tab open.
- Managers and admins are treated as covering every Chat-visible site on this page.

4. Dashboard & visitor monitoring

Active Visitors

The dashboard's **Active Visitors** grid is an awareness view, not a work queue. It shows everyone on your sites within roughly the last 30 minutes:

- Columns: visitor label, site, current page, time on site, visit count, source, conversation status, and assigned agent.
- Click a row to open the conversation or the visitor's detail.
- Standard grid controls: refresh, sort, paginate, manage columns.

Visitors by Site

- A line chart of visitor volume over time, one line per site.
- Ranges: Today, Yesterday, This Week, This Month, or Custom.
- Time-block control: 10, 15, 30, or 60-minute buckets.
- Click a site in the legend to focus or hide it; hover for exact counts.

Live counts

Near-real-time figures sit alongside the chart: active conversations, waiting for agent, unread by agents, and the oldest waiting chat.

Visitor records

- **Visitors** page — a directory of identified and anonymous visitors.
- **Visitor detail** — name, email, phone, status, first/last seen, total conversations and sessions, full conversation history, and recent browsing sessions (with time per page).
- **Visitor drawer** — open a visitor's history in a slide-out panel from most lists, without leaving your place.
- **Contacts** — the contact-record view, with tabs for conversations, visitors/devices, and browsing activity.

Setup checklist

On first use, a checklist tracks the essentials: create a site, assign agents, go online, and start receiving traffic. It adapts to your role.

5. Reports

Reports summarize what your team and sites are doing. They share a common filter bar: date range, website, team member, include-disabled-users, group-by (User or Website), and queue.

OVERVIEW

Headline metrics plus daily trend charts — conversations per day and average response time per day.

TEAM PERFORMANCE

One row per agent (or per website when grouped that way):

- Chats handled; positive and negative ratings with percentages.
- Average duration and average response time.
- Missed chats.
- Export to CSV. External agents see data scoped to their assigned sites.

SITE PERFORMANCE

One row per site: conversations, unique visitors, active conversations, missed chats, average duration, average response time, and positive/negative percentages.

QUEUE PERFORMANCE

One row per queue: queue name, conversations, open, waiting for agent, resolved, closed, missed, average duration/response, and sentiment percentages.

Metric glossary

Metric	What it means
Average response time	How long, on average, before the first agent reply.
Average duration	How long conversations stay open from start to close.
Missed chats	Conversations that timed out or went unanswered.
Positive / Negative %	Share of rated conversations marked positive or negative by visitors.

6. Canned responses

Canned responses (also called Quick Responses) are reusable reply templates that save typing and keep wording consistent.

USING ONE IN A CHAT

In the conversation composer, open the **Quick Response** dropdown, pick a response, and it drops into the editor. Adjust the text for the situation, then send. You see all active global responses plus any active responses for that conversation's site.

MANAGING THEM MANAGER / ADMIN

From the Canned Responses page you create and edit templates with these fields:

- **Title** — the agent-facing name (e.g. "Thanks for waiting").
- **Shortcut** — an optional quick-find trigger.
- **Body** — the text inserted into the composer.
- **Status** — Active or Inactive.
- **Website scope** — All Websites, or one specific site.

TIPS

- Use clear, descriptive titles so agents find the right one fast.
- Scope site-specific wording (hours, policies) to that site; keep general greetings global.
- Treat templates as a starting point — personalize before sending.

7. Site & widget setup ADMIN

Create a site

From **Sites**, add a site and fill in:

- Name and status (active/inactive).
- Allowed domains — where the widget is permitted to run.
- Welcome message (shown when chat opens) and offline message (shown when unavailable).
- Business hours (timezone, days, hours) — inherit the global default or override per site.
- Theme colour and queue name.
- Email delivery — shared mailbox or a fallback destination email.
- Reset behaviour — whether visitor sessions reset on browser close, after a conversation closes, or on a new page visit.

The site key and widget token are generated for you and are read-only.

Install the widget

1. Open the site's **Install** panel and copy the snippet.
2. Paste it into your website before `</body>` on the pages where chat should appear.
3. Use **Verify Install** to confirm the widget is live — it reports the last URL and time it was seen.

```
<script async src="https://your-domain.example/cars/Chat/widgetAsset/loader?site_key=your-site-key"></script>
```

Customize the chat box

The **Customize** screen has tabs for the Launcher, Appearance (colours), Conversation copy, Offline, Contact form, Triggers, Hosted page, Transcripts, and Rating/Feedback. A desktop/mobile preview updates as you edit. Highlights:

- Choose the launcher style (icon+text, icon, or text) and colours for every part of the box.
- Write state-specific titles/subtitles for before-chat, chatting, after-chat, and unavailable.
- Configure the pre-chat form (which of name/email/phone/message to show and require).
- Set auto-open triggers and toggle the "Powered by Indition" footer.

Assign agents

On the site's team, choose **All Users** (every agent and manager, plus explicitly named external agents) or **Specific Users** (only the people you list). Coverage drives whether visitors get live chat or the offline form.

QUICK SETUP SEQUENCE

1. Create the site.
2. Install and verify the widget.
3. Assign agents.
4. Go available.
5. Send a test visit from the customer's site.

8. Settings & notifications

Chat settings ADMIN

- **General** — turn Chat and the widget on/off, enable real-time delivery, set default welcome/offline messages, global business hours, default queue, theme colour, conversation auto-close time (TTL), and visitor session idle time, plus the session reset policy.
- **Email delivery** — choose a shared mailbox or fallback email used as the module default; sites can override it.
- **Banned IPs** — block abusive visitors by IP, account-wide or per site, with a duration and notes; unban at any time.

Notification preferences (everyone)

Every operator controls their own notifications under Settings → Notifications:

- **Browser notifications** — desktop pop-ups for new chats and messages. You will be asked for permission once; you can enable later if you dismiss it.
- **Sound alerts** — choose tones for new incoming chats and for new messages on your conversations; optionally play sounds only when Chat is in the background.
- **Visitor notification rules** — get alerted about visitor activity by delivery method, visitor type, page, and site.
- **Quiet hours** — restrict visitor notifications to a schedule (timezone, days, start/end).

> **Availability and alerts:** new-chat alerts are suppressed while you are unavailable, but alerts for unread messages on chats you already own still come through.

RECOMMENDATIONS

- Turn on browser notifications and a sound for new chats so you never miss one.
- Enable "play only in background" if the constant ping is distracting while you work in Chat.
- Set quiet hours so off-shift staff aren't pinged by visitor-activity rules.