

Agent's Handbook

From getting started to everyday work,
boldly go into the world of LiveChat.



Who is this Handbook for?

This Handbook is for sales reps, support heroes, agents, chat operators, and all those using LiveChat to stay in touch with customers.

It's here to help you use LiveChat to create the best customer experience. We'll cover topics like:



Setting up LiveChat for the first time.



Everyday workflow with chats and tickets.



Team collaboration



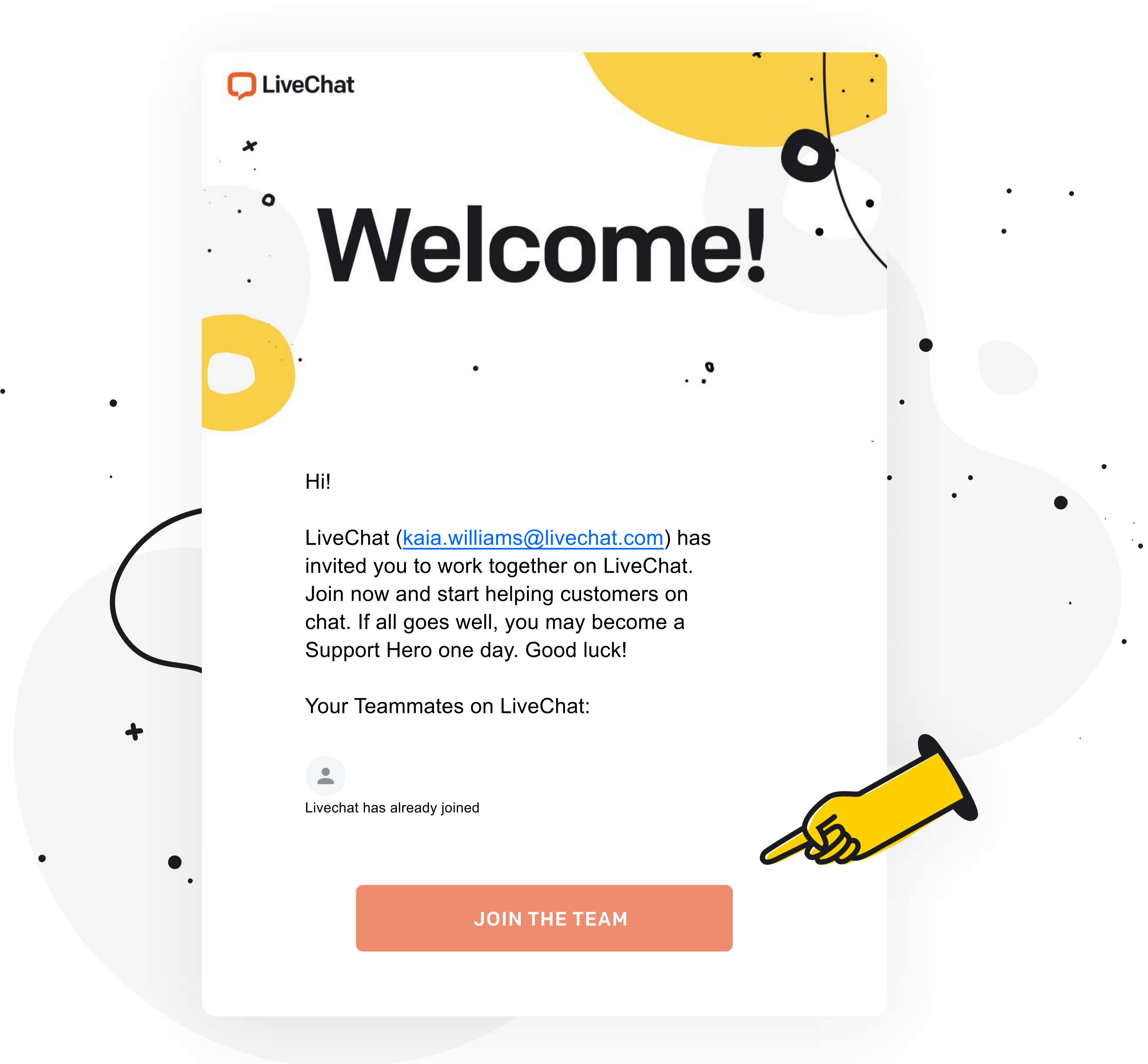
Useful tips from our Support Heroes and the Sales Team.

Welcome to LiveChat



Say hello

When you join your team on LiveChat, you either receive an invitation email or an invitation link. Whether you click the **“Join the team”** button or click on the link, you’re first asked to set up your password. Make sure it’s secure, and save it. You’ll need it to log into the LiveChat Agent app.



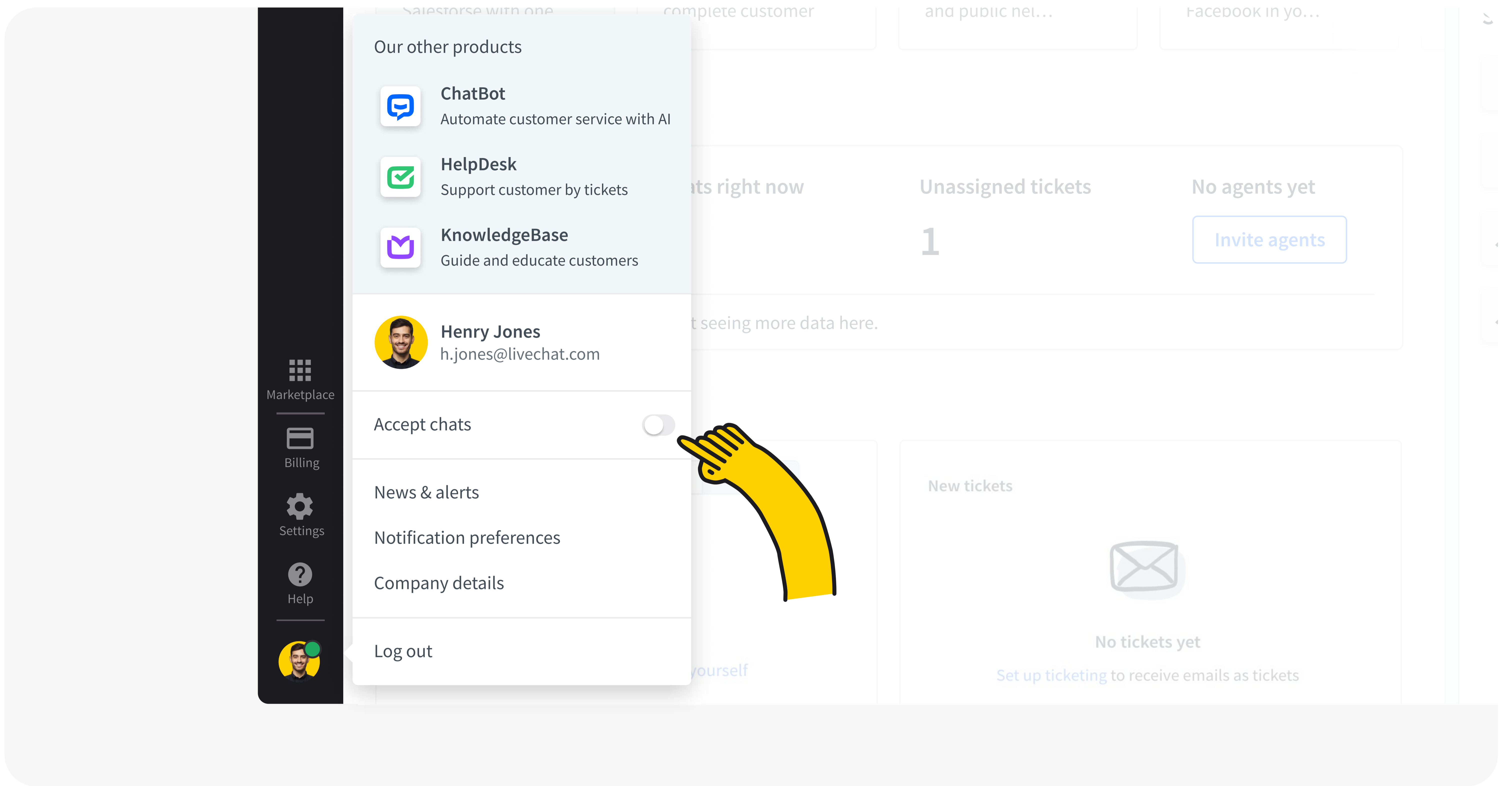
Once you set up the password, you’re redirected to the [LiveChat Agent app](#). When you’re there, you can start receiving chats straight away.

If you would like to have a look around the app first, switch your **Accept chats** status off. If you’re going to continue later, use the **Log in** option on [livechat.com](#) or, better still, [download the LiveChat Agent app](#).

Set your status

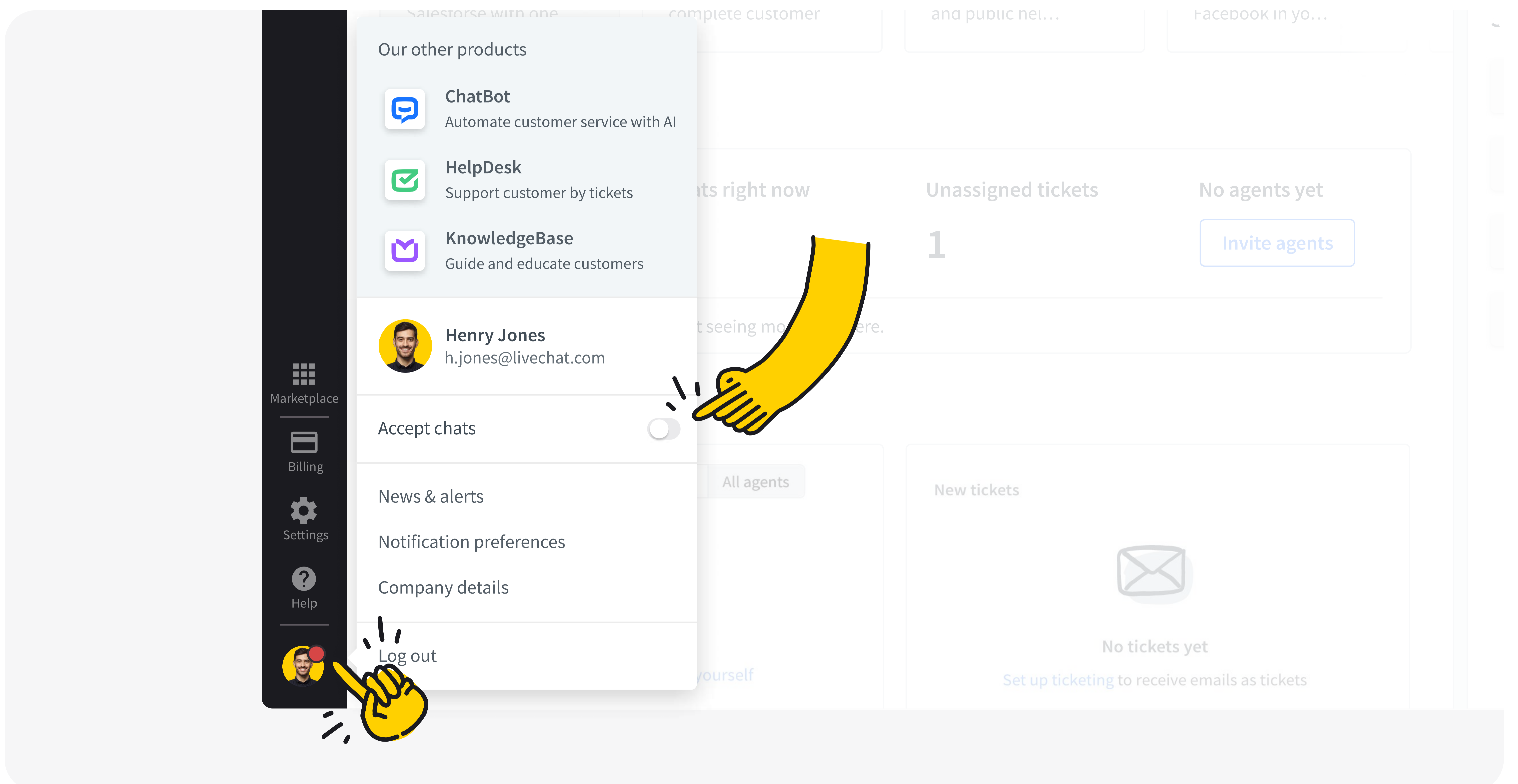
Accepting chats

When you start your shift on chats, make sure the **Accept chats** toggle is switched on. You can use this toggle to take yourself out of active chatting at the end of your shift, during a break, or when you need to attend to other duties.



Not accepting chats

When you're off accepting chats, no new chats will be assigned to you. You will still be able to:



Finish ongoing chats

Finish any ongoing chats you may have. For example, when you switch off before the end of your shift.

Assign new chats to yourself

Assign new chats to yourself, or start a chat manually ([we'll get into that in the Chats section below](#)).

Receive a transferred chat

Receive a transferred chat if one of your teammates transfers one specifically to you. For example, when you are a specialist who only takes chats after triage.

Do any other work

Do any other work inside the LiveChat Agent app, like handle tickets, monitor traffic on your website, supervise the chats of other agents, and more.

You can read more about statuses in our [Help Center](#).



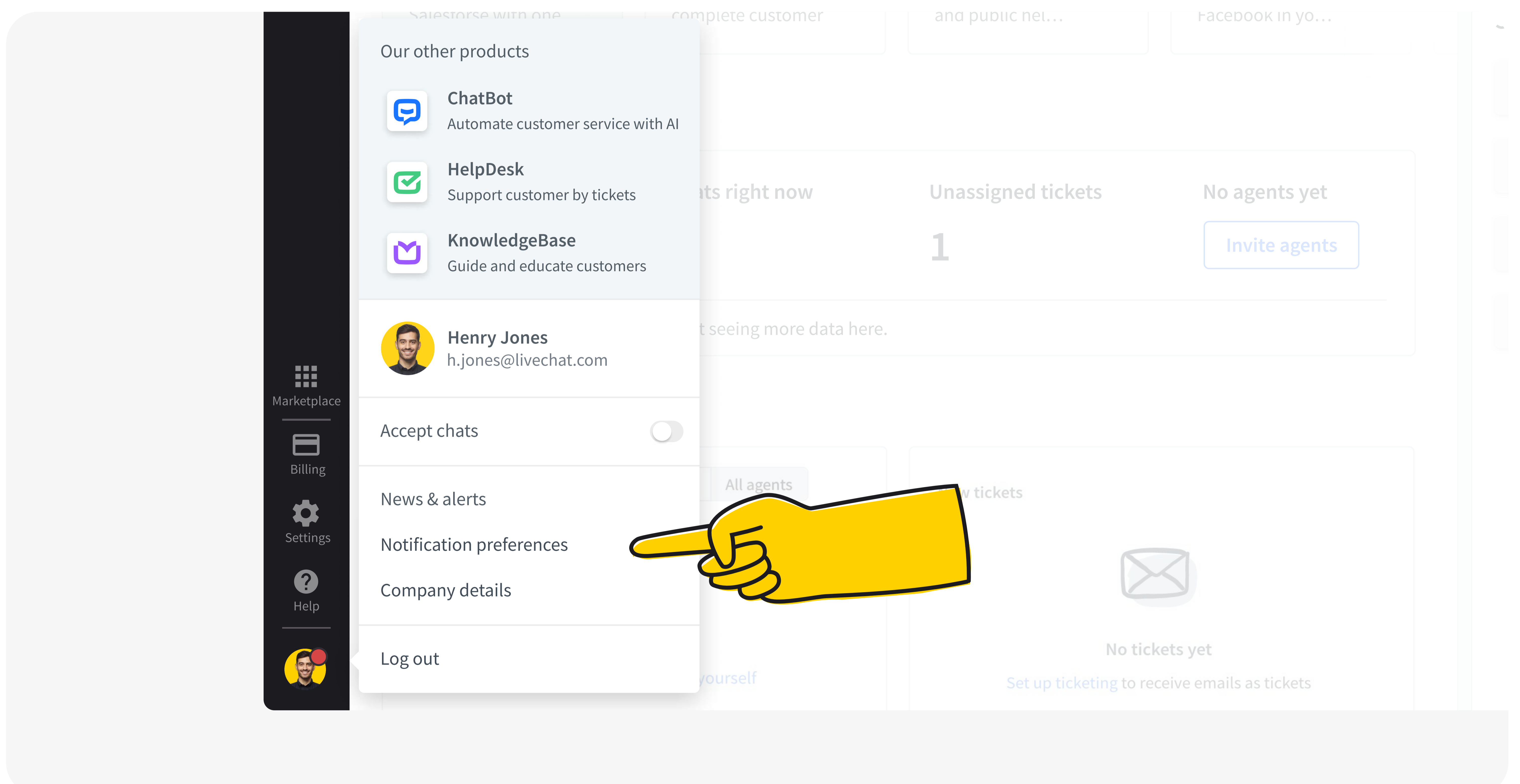
Check your status

If you notice you're not receiving any chats, always make sure that your status is set to **Accept chats**.

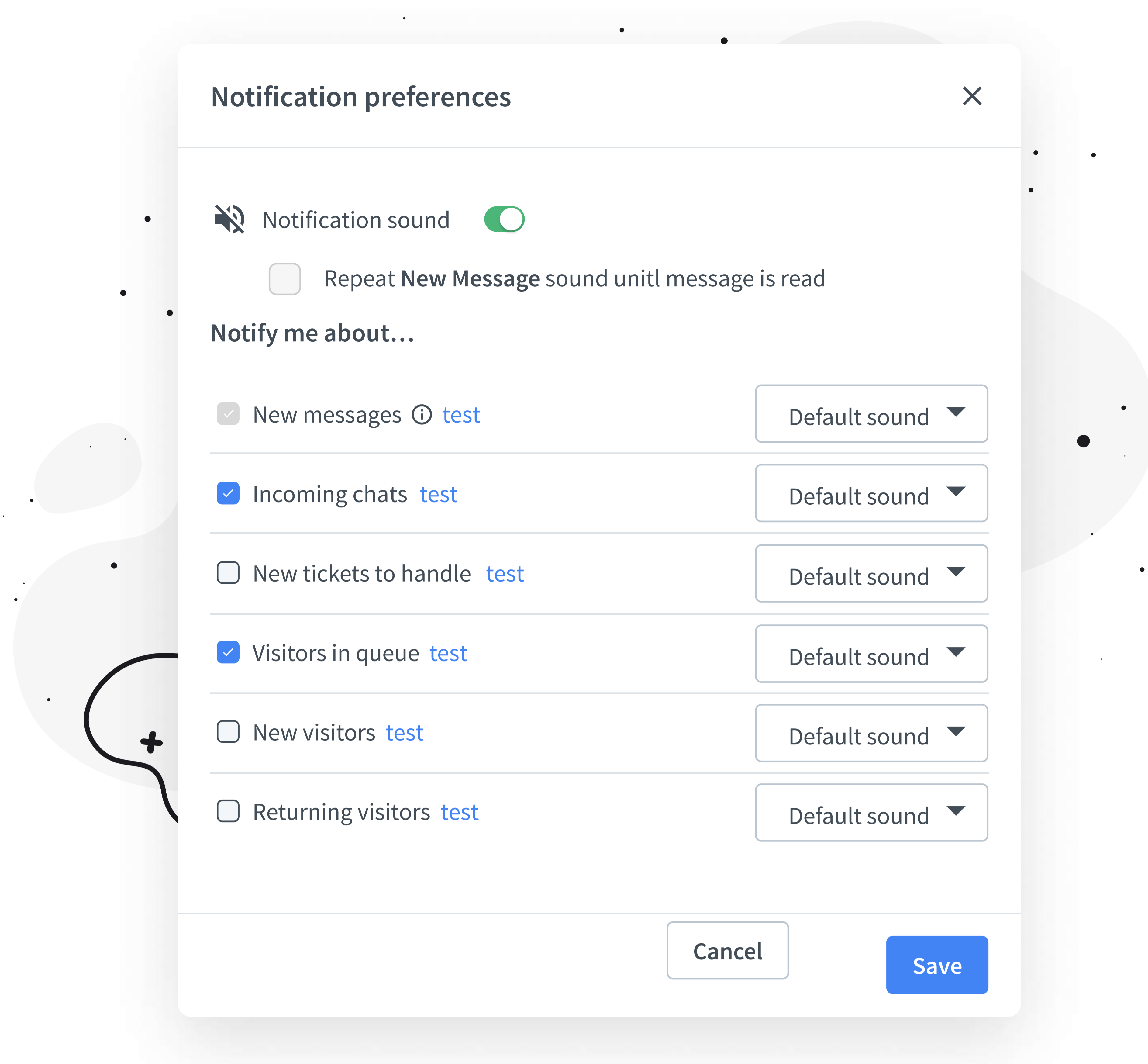
In this menu you can also log out at the end of your shift, and set your notification preferences.

Set up notifications

When you click on **Notification preferences**, you will be able to configure the notifications to match your workflow.



Make sure that the sound is on and that you can see and hear the notifications well. You can test them in the configuration panel.



Turn off what you don't need

If there is heavy traffic on your website, you might want to disable the **New visitor** notification not to drown out the sound of events you need to know about, like incoming chat, new message in chat, or new ticket.



Turn on what you need

If your business is just starting out, you might want to be notified about new and returning visitors on your website, to be able to see in real time which pages they visit, how much time they spend there, and even proactively start a chat with them.

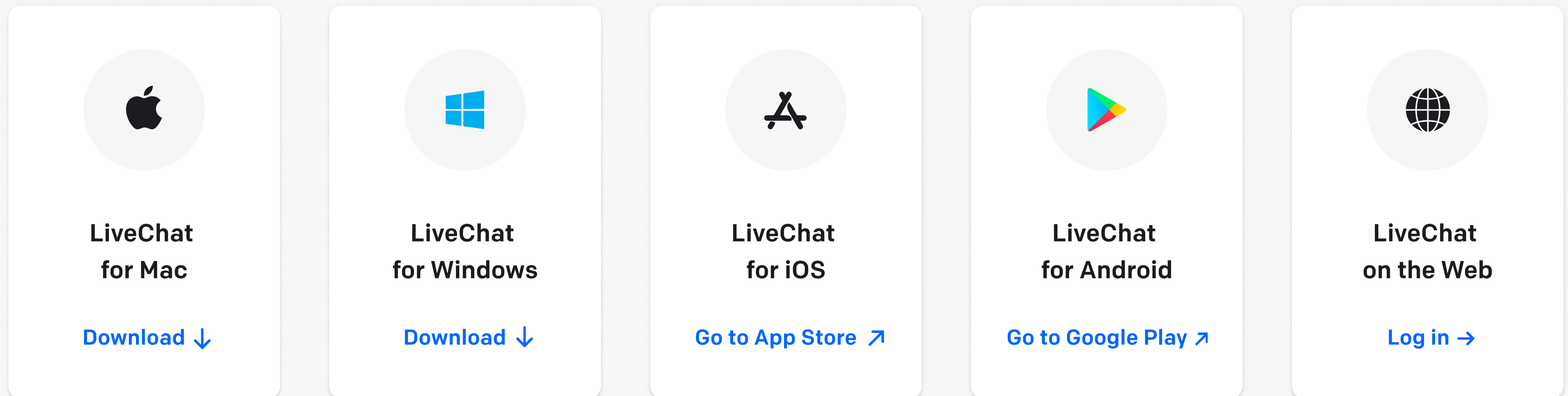


Customize notifications

Download our [desktop app](#) to be able to customise the notification sounds and even upload your own. You can also customise the notification sounds in our mobile apps for [iPhone](#) and [Android](#)

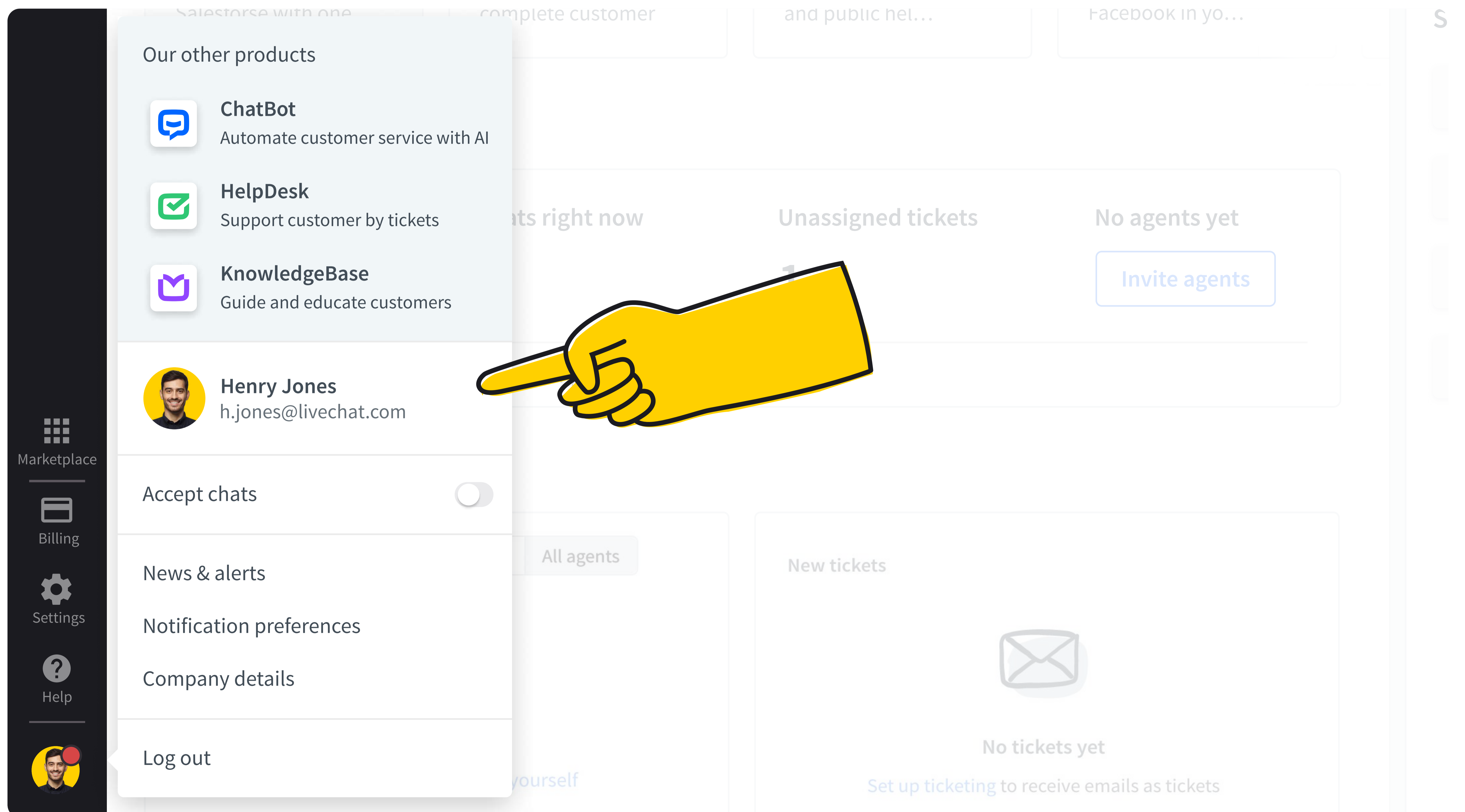
Download the LiveChat Agent App

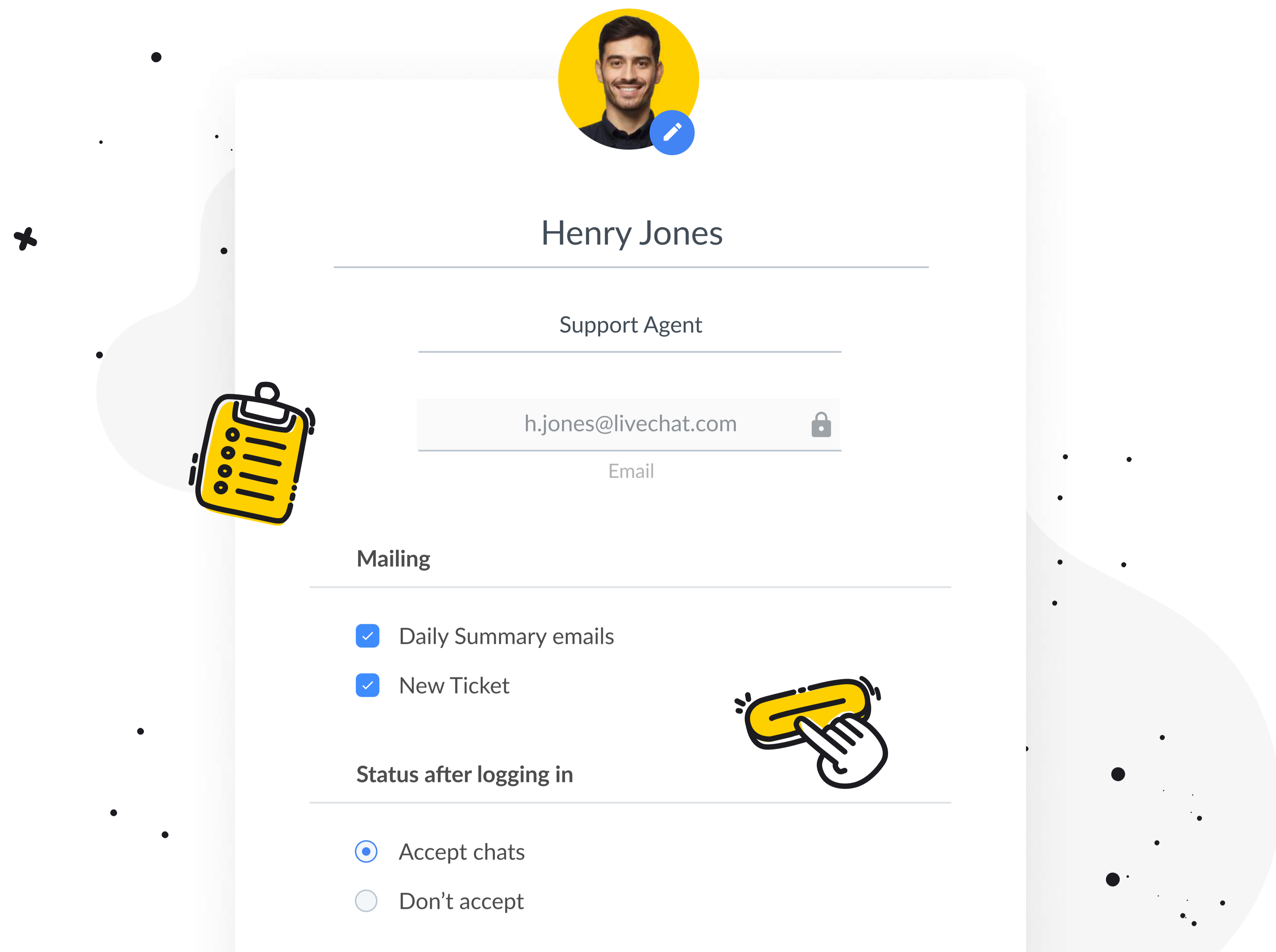
You can use the LiveChat Agent app for [web browser](#), [desktop](#) or mobile. If you would like to read on about it, we have an article on LiveChat Agent apps in our [Help Center](#).



Set up your Agent profile

Now, let's set up your [Agent profile](#). To edit your Agent profile, click on your name in the profile menu.





Add photo

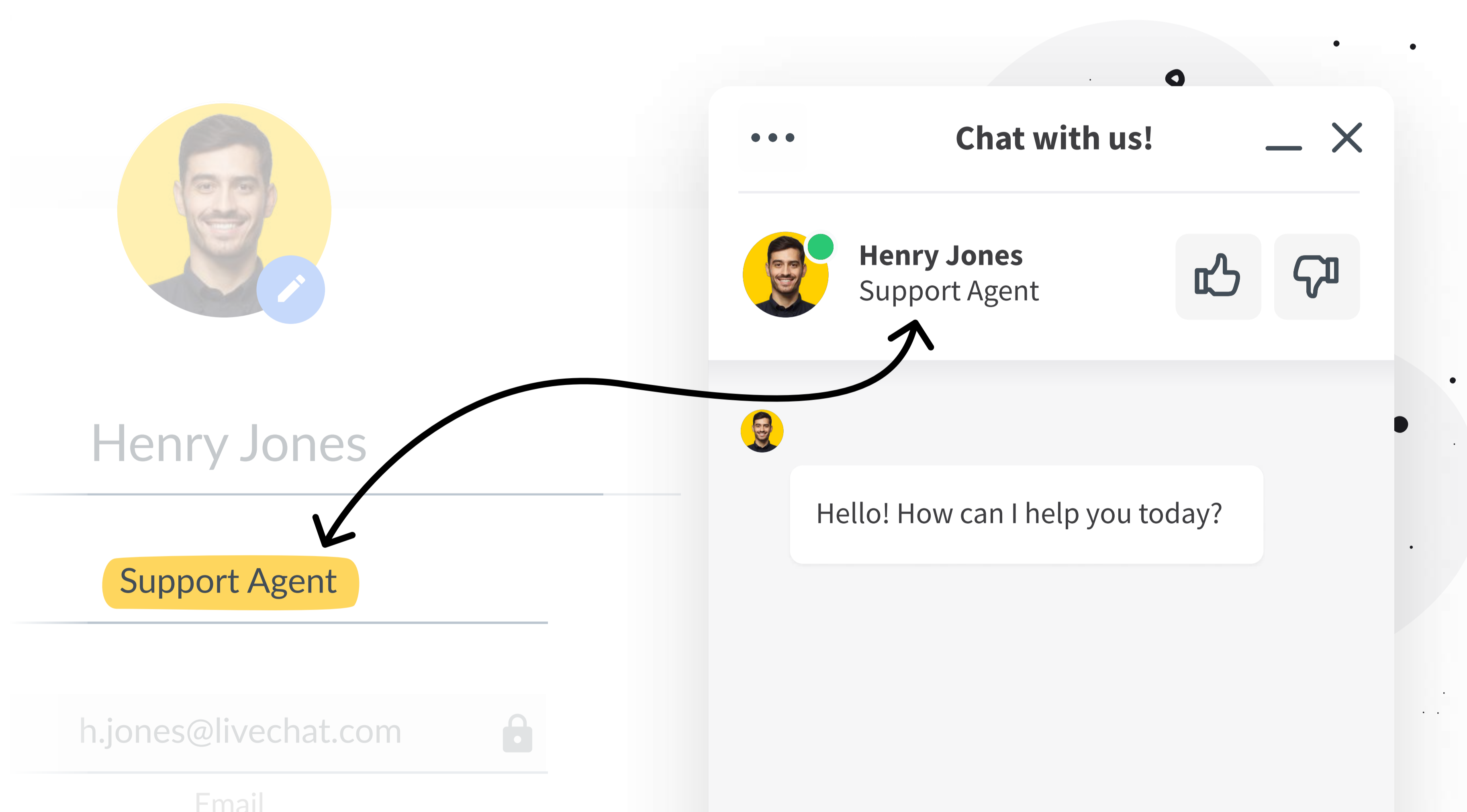
Add a photo to your profile. Customers appreciate seeing who they're chatting with. You can also pick a photo from our gallery of default faces

Edit your name

Make sure that your **Name** is one you want to be displayed to the customers

Edit your job title

Make sure the **Job title** reflects your company's naming convention. Both your name and your job title will be displayed to the customer when they start the chat

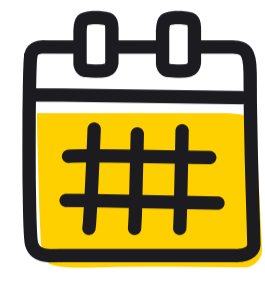


Private email

Your email is not displayed for the customers to see

Set your Status after logging in

Set your **Status after logging in**. If you jump on chat right after logging in to the LiveChat Agent app, leave it at **Accept chats**. If you need time in the app before getting your first chat, e.g., to handle tickets, look through Archives, supervise your teammates' chats, switch your **Status after logging in** to **Don't accept chats**.



Set up working hours

Your team may be using the [Work scheduler](#). If this is the case, the **Working hours** toggle will be switched to green, and you won't need to set the Status after logging in. Your Status will be set to accepting chats during your working hours and to not accepting chats after hours. You'll still be able to switch off chats for breaks, and to attend to other duties. All you need to do is make sure you are logged into the LiveChat Agent app. Work scheduler is available in Business and Enterprise [plans](#).

Working hours

Monday 9:00 am - 5:00 pm 8h
12:00 am 12:00 am

Tuesday 9:00 am - 5:00 pm 8h
12:00 am 12:00 am



Check if you're on the right team

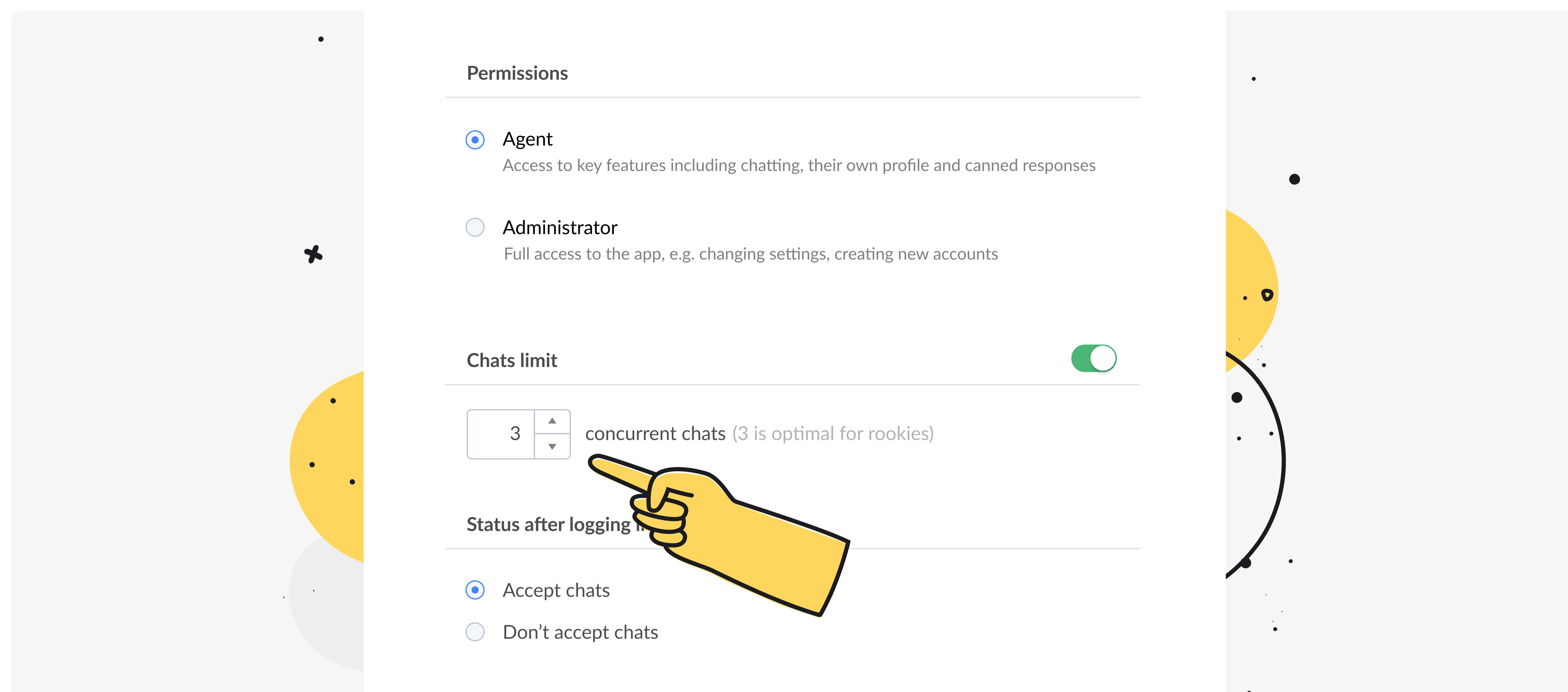
Your company may be using Groups to direct chats to different departments or teams. Check with your leader if you are added to the appropriate Groups to be able to receive chats, access tickets and archived chats as well as canned responses or tags. [Read more about Groups in our Help Center](#).



In the [Agents](#) section, you can see your whole team. You can see the **roles** that various team members have. Depending on the role, you have access to different sections of the LiveChat Agent app. You can read more about [roles here](#).

Your team leader will usually have an **Admin** or **Owner** role, and in this Handbook, we'll sometimes recommend consulting them for the specific ways your company uses LiveChat.

One example of this is the **Concurrent chat limit**. This is set in your Agent profile by an Admin on your team. **Concurrent chat limit** is the maximum number of chats you may be assigned at the same time. We usually recommend three concurrent chats for rookies and up to six for seasoned agents, but it can depend on many business-specific factors.

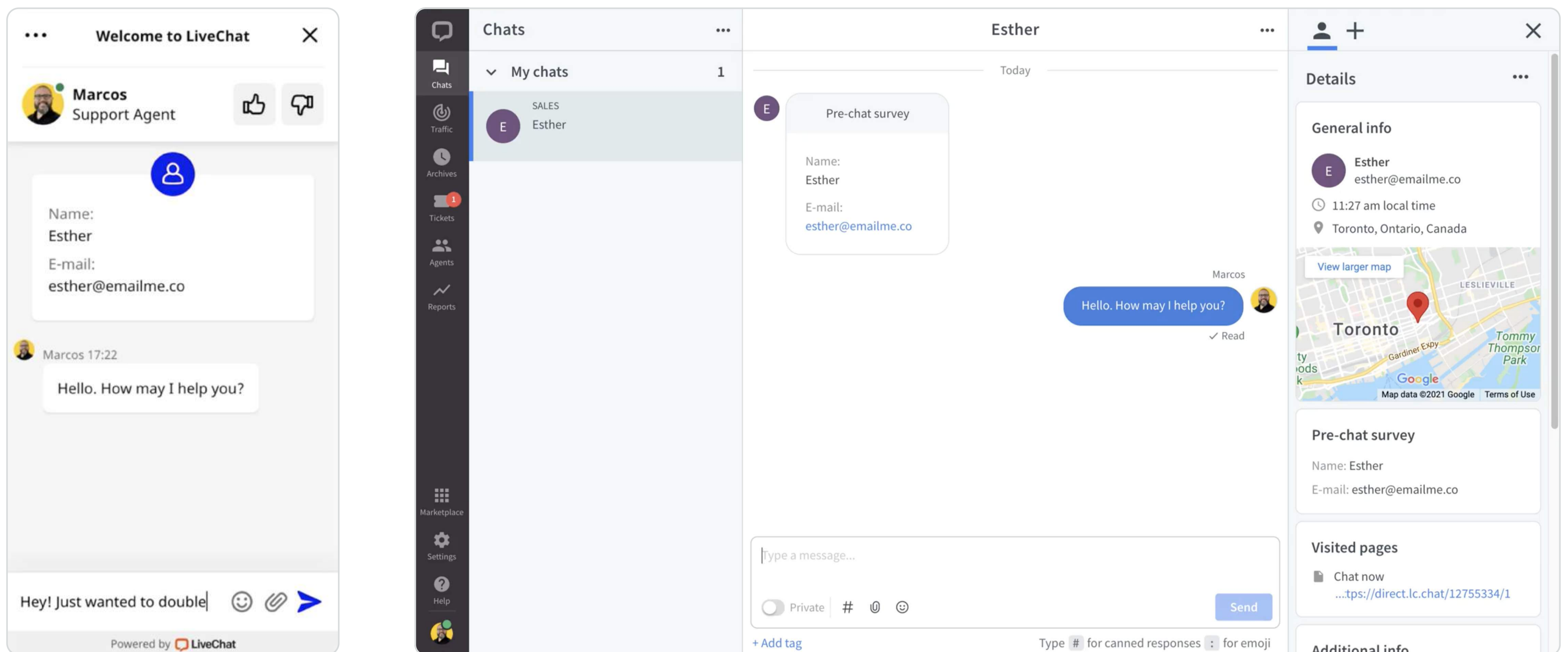


Every time a customer starts a chat, the chat will go to the agent with the fewest ongoing chats. Once all agents have met their chat limit, the next customer is directed to the queue where they will wait until one of the agents has a slot available because they have finished one of their ongoing chats.

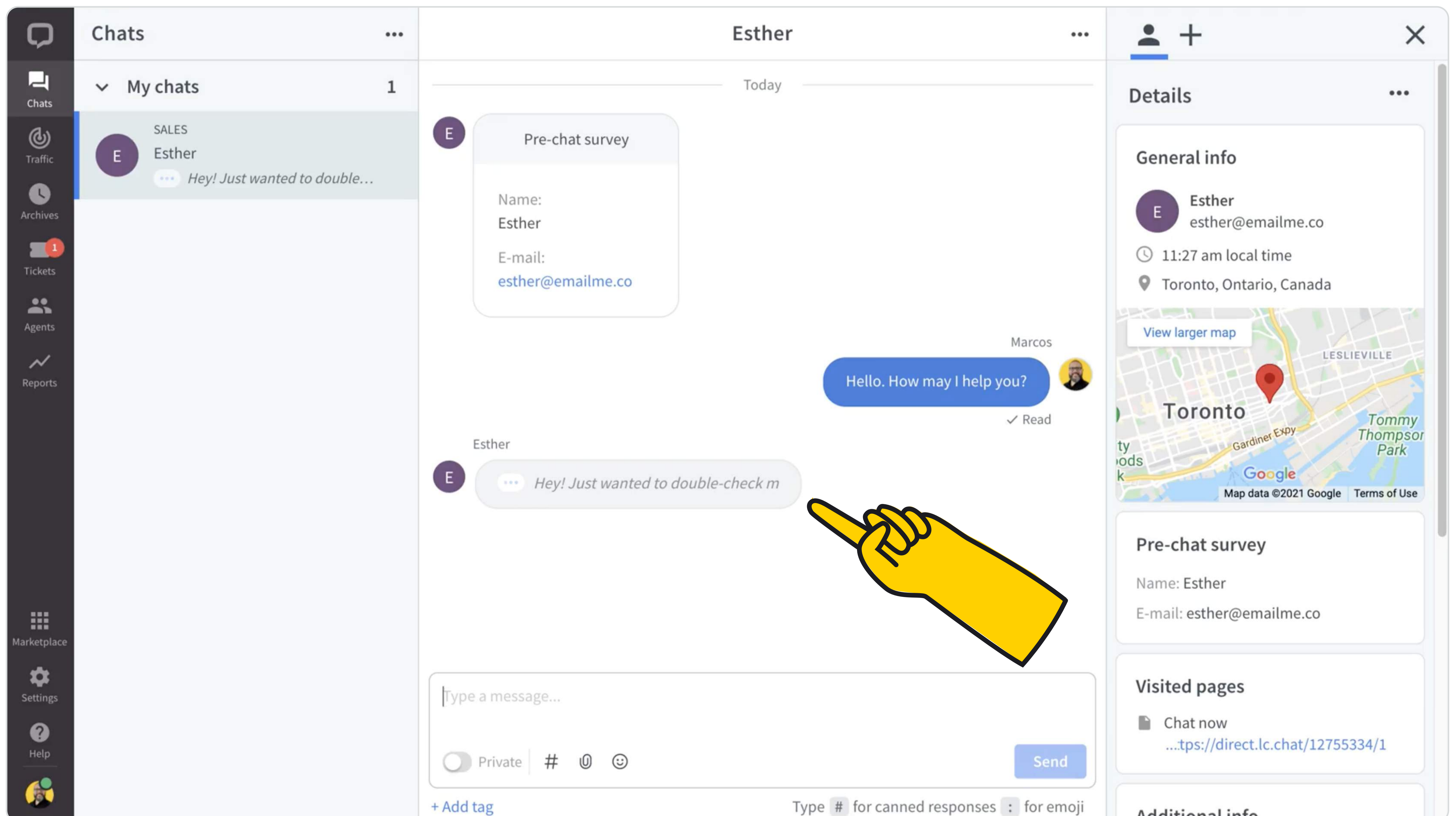
Chats

Getting a chat

When a customer starts a chat the first message they receive is [an automatic message](#) set up in the LiveChat Agent app. This way when you get a chat, you have a bit of time to get ready.

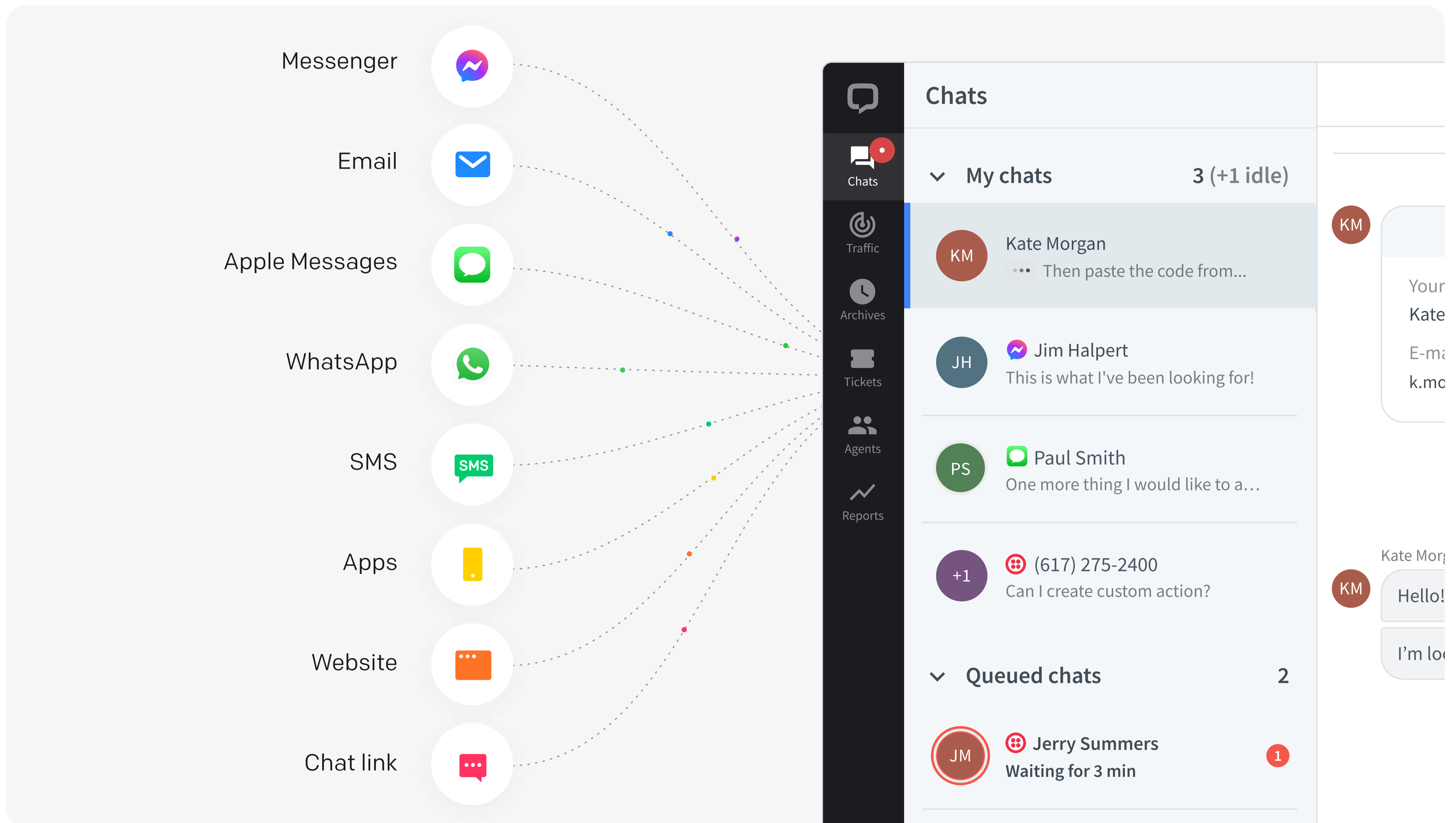


When the customer starts to type their message, you'll see what they are writing in real time. When you write a response, the customer can see that you are composing a message, but they can't see what you're writing.



Where do chats come from?

Chats are started by the customer. The customer can send a message in the Chat Widget on your company's website, on [the chat page](#), or in [your company's mobile app](#), if the Chat Widget has been implemented there.



Additionally, LiveChat can be integrated with [social media messengers](#), [Apple Business Chat](#), or [SMS](#). Check with your team leader which channels you use as a company.

One more source of chats is the chat transfer. A colleague can transfer a chat to your team, or to you specifically. You can read more about it in [Team collaboration](#) below.



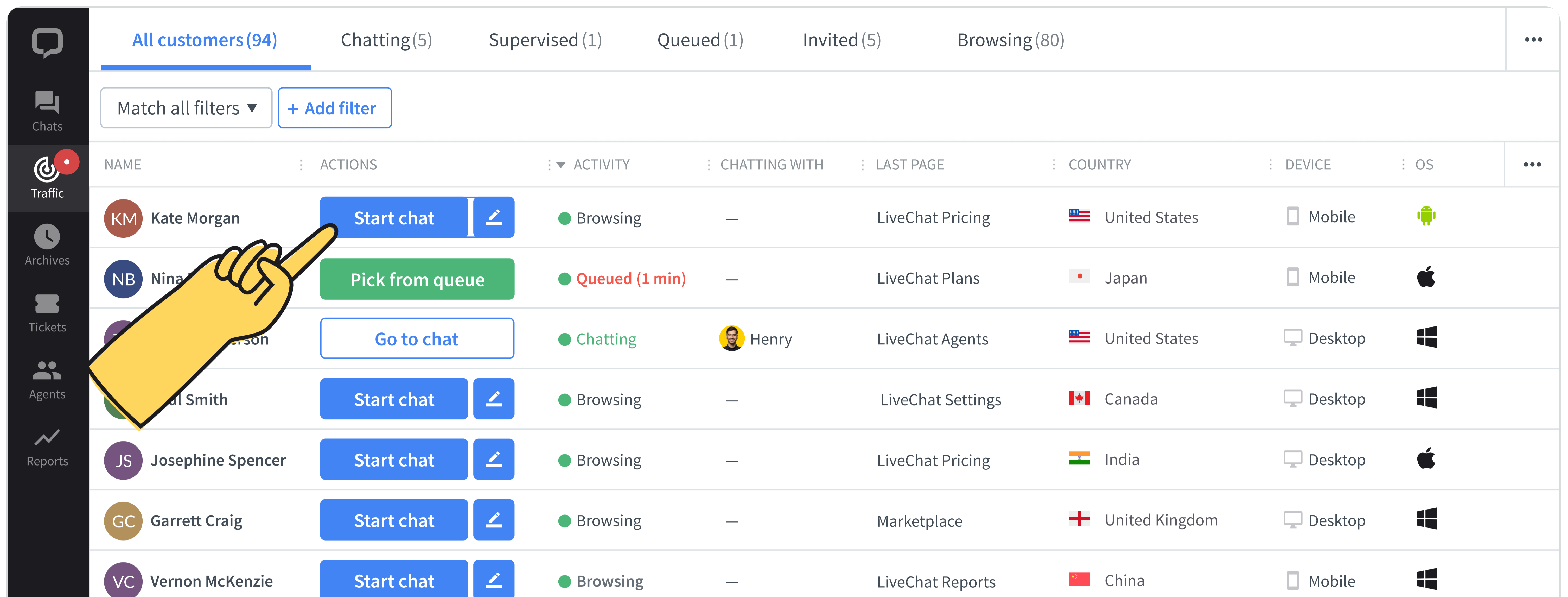
Check it for yourself

Start a chat on your company's website to see what the experience is like for the customer. You can ask your teammate to transfer the chat to you, and try having a chat with yourself.

While technically the chat starts when the customer sends a message or clicks on a button in the Chat Widget, LiveChat lets you invite customers to chat. This can be done automatically, with [targeted messages](#), or manually, from the Traffic section of the LiveChat Agent app.

How to start a chat manually?

In the Traffic section you see customers as they browse your website in real time.



NAME	ACTIONS	ACTIVITY	CHATTING WITH	LAST PAGE	COUNTRY	DEVICE	OS
KM Kate Morgan	Start chat	Browsing	—	LiveChat Pricing	United States	Mobile	Android
NB Nina	Pick from queue	Queued (1 min)	—	LiveChat Plans	Japan	Mobile	Apple
erson	Go to chat	Chatting	Henry	LiveChat Agents	United States	Desktop	Windows
al Smith	Start chat	Browsing	—	LiveChat Settings	Canada	Desktop	Windows
JS Josephine Spencer	Start chat	Browsing	—	LiveChat Pricing	India	Desktop	Apple
GC Garrett Craig	Start chat	Browsing	—	Marketplace	United Kingdom	Desktop	Windows
VC Vernon McKenzie	Start chat	Browsing	—	LiveChat Reports	China	Mobile	Windows

Click on **Start chat** to send a preset [welcome message](#) or on the pen icon to customize the message you want to send to the customer. Once you do, you'll see the chat on the list in the Chats section.



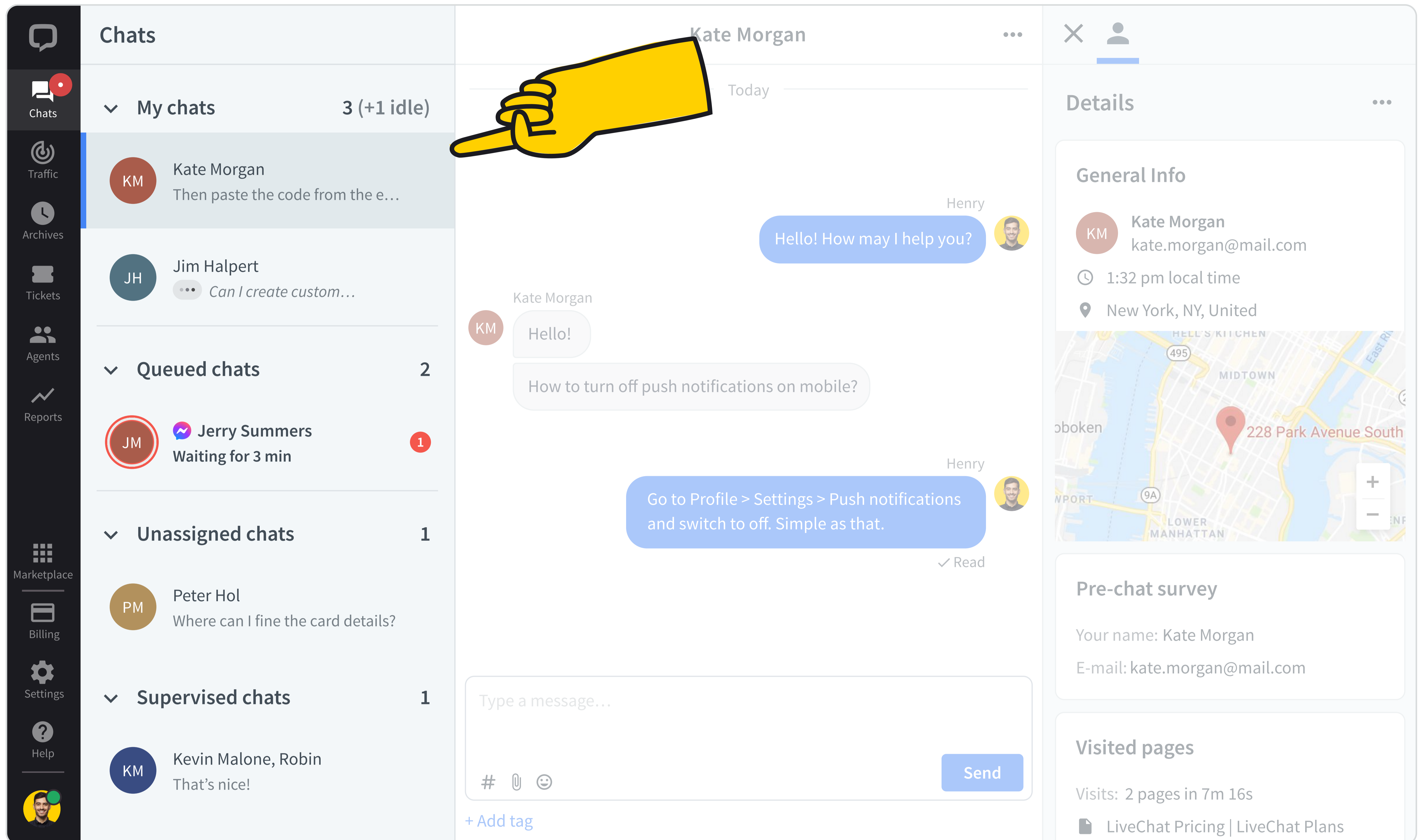
Chat with your leader

Sending manual invitations is a strategic choice, so check with your team leader if you should use it.

Chats section in LiveChat Agent app:

Chat lists

On the left of the Chats view there is a list of all chats that may require your attention.



The screenshot displays the LiveChat Agent app interface. On the left is a sidebar with navigation icons for Chats, Traffic, Archives, Tickets, Agents, Reports, Marketplace, Billing, Settings, and Help. The main area is divided into three sections:

- Chats List (Left):** A list of chat sessions categorized into 'My chats', 'Queued chats', 'Unassigned chats', and 'Supervised chats'. A yellow hand icon points to the 'My chats' section, which shows 3 (+1 idle) chats. The first chat is with 'Kate Morgan'.
- Chat Conversation (Center):** A chat window for 'Kate Morgan'. The messages are:
 - Henry: Hello! How may I help you?
 - Kate Morgan: Hello!
 - Kate Morgan: How to turn off push notifications on mobile?
 - Henry: Go to Profile > Settings > Push notifications and switch to off. Simple as that.
- Details Panel (Right):** A 'Details' panel for the selected chat with 'Kate Morgan'. It includes:
 - General Info:** Name: Kate Morgan, Email: kate.morgan@mail.com, Time: 1:32 pm local time, Location: New York, NY, United States.
 - Map:** A map showing the location at 228 Park Avenue South.
 - Pre-chat survey:** Your name: Kate Morgan, E-mail: kate.morgan@mail.com.
 - Visited pages:** Visits: 2 pages in 7m 16s. Pages: LiveChat Pricing | LiveChat Plans.

My chats:

My chats are the ongoing chats that have been assigned to you. Make sure that customers don't wait too long for a reply. If they wait for more than 40 seconds, there will be a red rim around their circle. If they don't reply for too long, the circle will be grayed out. [Read more about active and inactive chats.](#)

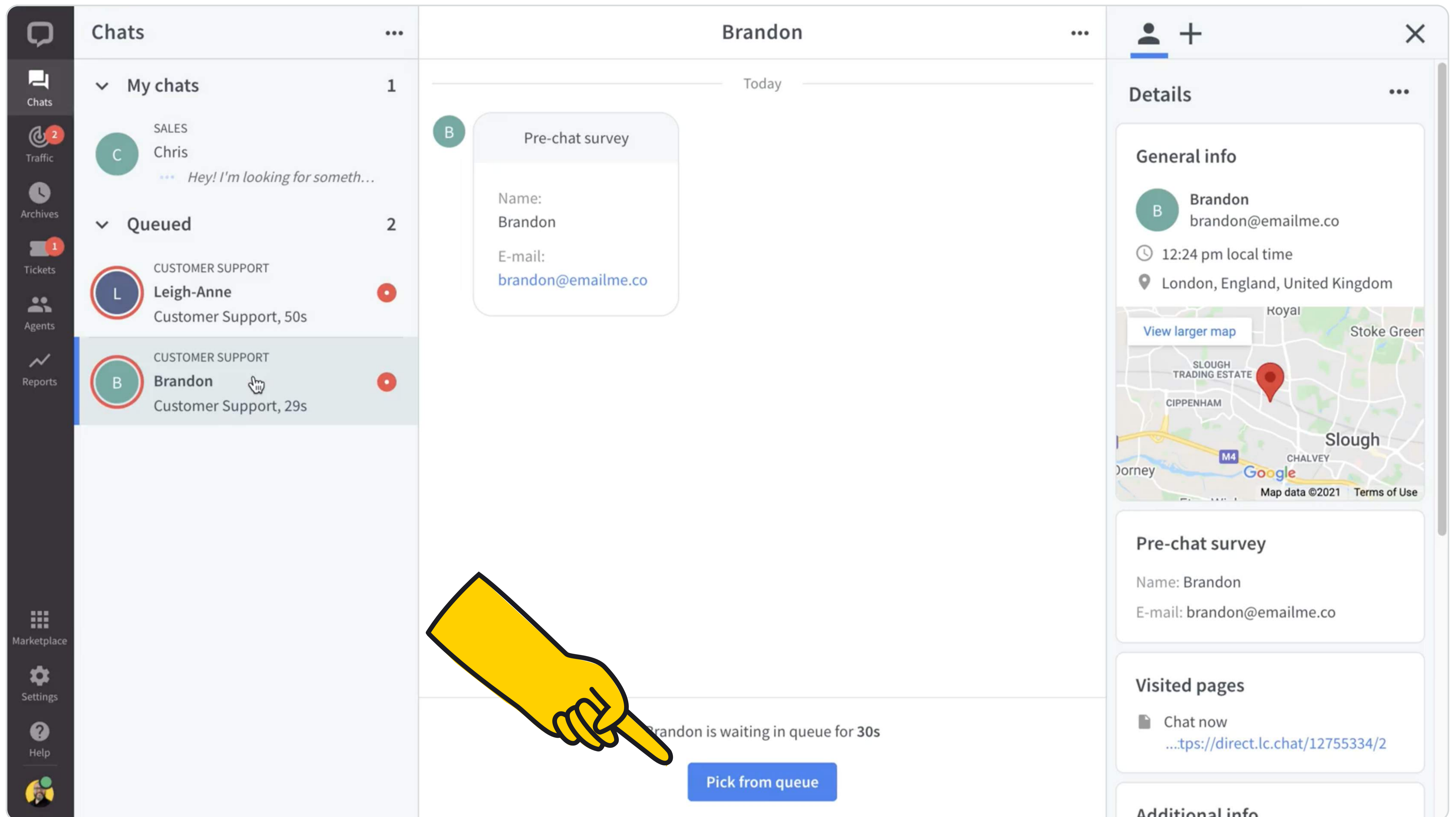
The screenshot displays a chat management interface. On the left is a sidebar with navigation icons for Chats, Traffic, Archives, Tickets, Agents, Reports, Marketplace, Billing, Settings, and Help. The main area is divided into three sections:

- Chats:** A list of chat categories: 'My chats' (3 (+1 idle)), 'Queued chats' (2), 'Unassigned chats' (1), and 'Supervised chats' (1). Under 'My chats', the chat for 'Kate Morgan' is highlighted with a yellow hand icon pointing to it. Other chats include 'Jim Halpert' and 'Jerry Summers' (waiting for 3 min).
- Chat Window:** The active chat for 'Kate Morgan'. It shows a message from 'Henry' asking 'Hello! How may I help you?'. A response from 'Kate Morgan' says 'Hello!' and 'How to turn off push notifications on mobile?'. A follow-up message from 'Henry' says 'Go to Profile > Settings > Push notifications and switch to off. Simple as that.' The chat is marked as 'Read'.
- Details Panel:** Information for 'Kate Morgan', including contact details (kate.morgan@mail.com), location (New York, NY, United States), a map showing the location at 228 Park Avenue South, a pre-chat survey (name: Kate Morgan, email: kate.morgan@mail.com), and visited pages (LiveChat Pricing | LiveChat Plans).

Queued chats:

Queued chats are a list of customers waiting in the queue. Customers are queued for two reasons. One, there are more customers starting a chat than the agents on duty can handle, that is, all the agents have met their **concurrent chat limit**. Two, the chat routing set up for your team is **Manual selection**. With manual selection, all of the customers who start a chat begin in the queue. Agents can select one when they're available. [Read more about queue configuration.](#)

To select a chat from the queue, click on the chat and then on **Pick from queue**.



The screenshot displays a chat management interface. On the left, a sidebar shows a list of chats under 'My chats' and 'Queued'. The 'Queued' section lists two chats: one for Leigh-Anne (Customer Support, 50s) and one for Brandon (Customer Support, 29s). Brandon's chat is highlighted. The main area shows the chat details for Brandon, including a pre-chat survey with his name and email. A yellow hand icon points to the 'Pick from queue' button at the bottom of the chat window. The right sidebar shows details for Brandon, including his name, email, location, and a map of Slough.

Chats ...

My chats 1

SALES
Chris
Hey! I'm looking for someth...

Queued 2

CUSTOMER SUPPORT
Leigh-Anne
Customer Support, 50s

CUSTOMER SUPPORT
Brandon
Customer Support, 29s

Brandon

Today

Pre-chat survey

Name:
Brandon

E-mail:
brandon@emailme.co

Brandon is waiting in queue for 30s

Pick from queue

Details ...

General info

Brandon
brandon@emailme.co

12:24 pm local time

London, England, United Kingdom

View larger map

Pre-chat survey

Name: Brandon

E-mail: brandon@emailme.co

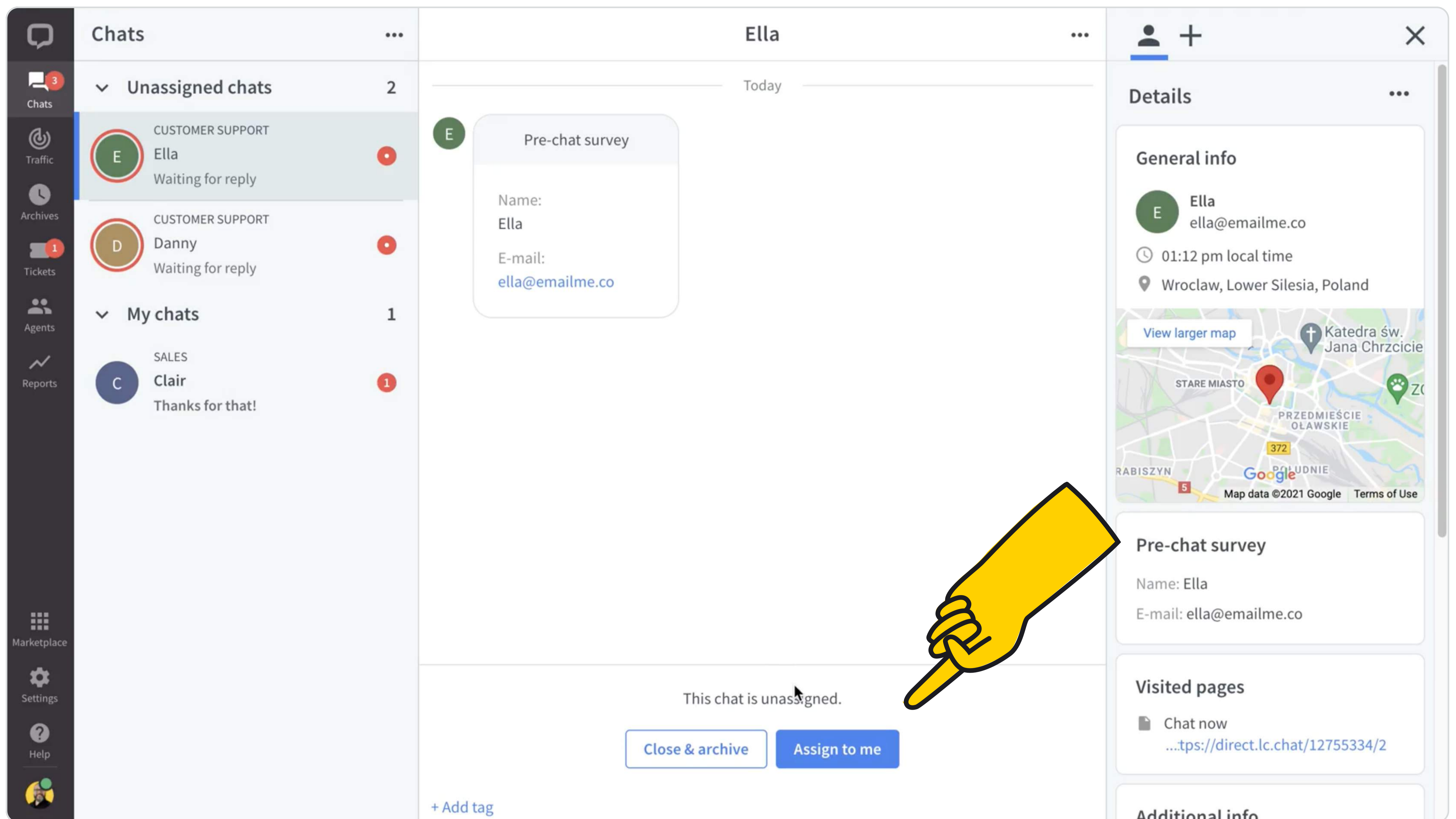
Visited pages

Chat now
...tps://direct.lc.chat/12755334/2

Additional info

Unassigned chats:

Unassigned chats are chats started by customers when your team was offline, if the [availability](#) of your Chat Widget is set to [Always](#). Otherwise, they can be messages sent on [Facebook Messenger](#), [Apple Messages for Business](#), [WhatsApp](#), or [Twilio](#). Ask your team leader if your company uses these options., To assign a chat to yourself, click on a chat on the list, and then click on Assign to me.



The screenshot displays a chat management interface. On the left, a sidebar lists chat categories: 'Unassigned chats' (2) and 'My chats' (1). Under 'Unassigned chats', two entries are visible: 'Ella' (CUSTOMER SUPPORT, Waiting for reply) and 'Danny' (CUSTOMER SUPPORT, Waiting for reply). Under 'My chats', one entry is visible: 'Clair' (SALES, Thanks for that!). The main area shows a chat with 'Ella' from 'Today'. A pre-chat survey is displayed with the following information: Name: Ella, E-mail: ella@emailme.co. Below the chat, a message states 'This chat is unassigned.' and two buttons are present: 'Close & archive' and 'Assign to me'. A yellow hand icon points to the 'Assign to me' button. On the right, a 'Details' panel shows general info for 'Ella' (ella@emailme.co), contact time (01:12 pm local time), location (Wroclaw, Lower Silesia, Poland), a map, and a pre-chat survey summary.

Supervised chats

Supervised chats is a list of your teammates' chats you have picked to supervise. You can supervise those chats and see how other agents communicate with visitors. For more details, see the [Team collaboration](#) section.

Chat view

This is where you will see the entire conversation with the customer, together with the data the customer provided in the [pre-chat survey](#). If the customer chatted with your team before, you'll be able to see their previous chats when you scroll up.

The screenshot displays a LiveChat interface with three main sections: a left sidebar, a central chat window, and a right-hand details panel.

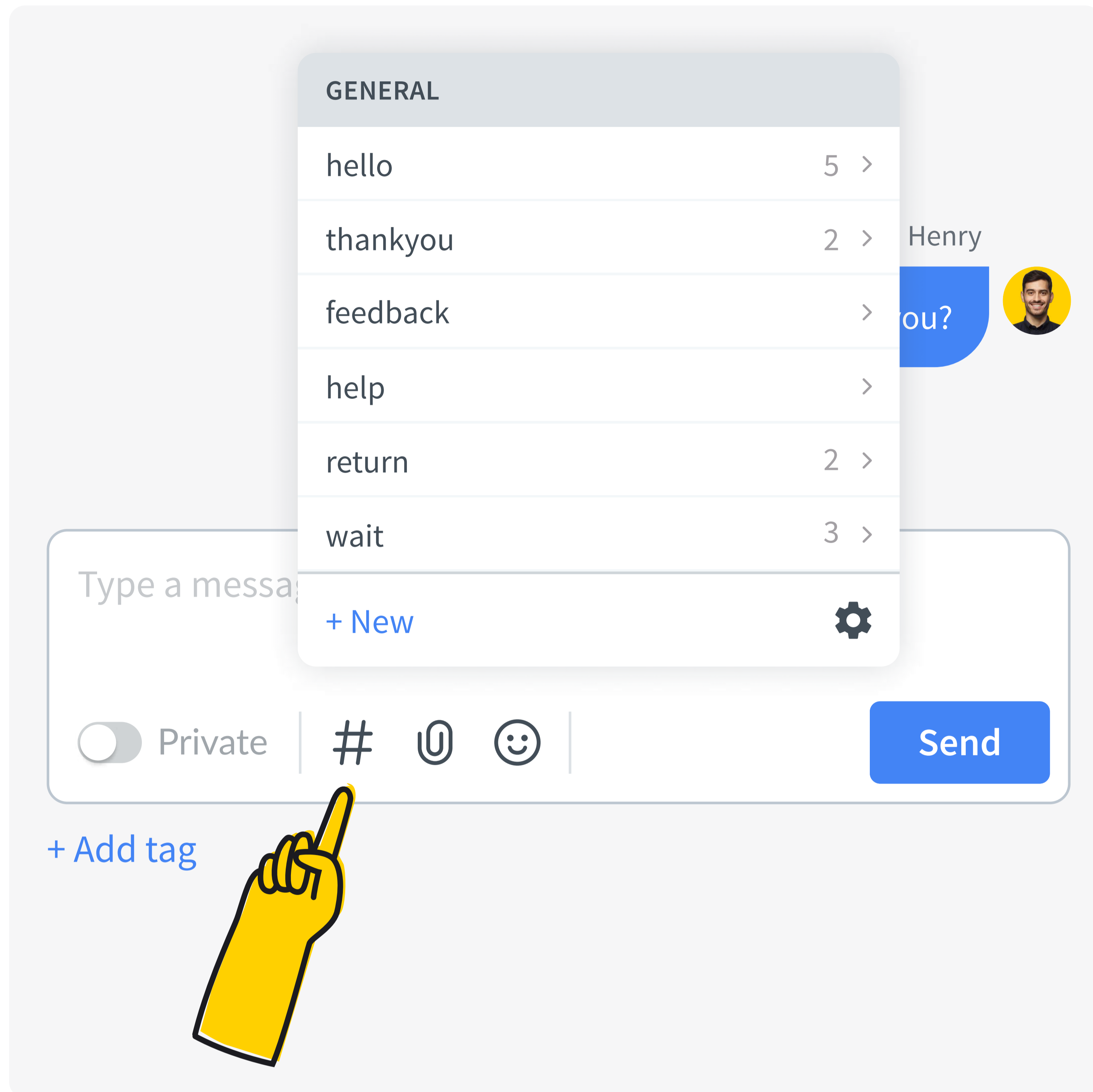
- Left Sidebar:** Contains navigation icons for Chats, Traffic, Archives, Tickets, Agents, Reports, Marketplace, Billing, Settings, Help, and a user profile icon.
- Chats List:** Shows a list of chat sessions categorized into 'My chats' (3 (+1 idle)), 'Queued chats' (2), and 'Unassigned chats' (1). The selected chat is with 'Kate Morgan' (KM), with a snippet of text: 'Then paste the code from the e...'. Other chats include Jim Halpert (JH), Paul Smith (PS), Jerry Summers (JM), Patricia Berlock (P), and Peter Hol (PM).
- Chat Window (Kate Morgan):** Shows the conversation history. A pre-chat survey is visible at the top, containing the text: 'Your name: Kate Morgan', 'E-mail: k.morgan@company.com'. A message from 'Henry' says 'Hello! How may I help you?'. At the bottom, there is a text input field with the placeholder 'Type a message...', a 'Send' button, and a '+ Add tag' link.
- Details Panel:** Provides information about the customer. Under 'General Info', it lists: 'Kate Morgan', 'kate.morgan@mail.com', '1:32 pm local time', and 'New York, NY, United'. Below this is a map showing the location '228 Park Avenue South'. The 'Pre-chat survey' section repeats the name and email. The 'Visited pages' section shows 'Visits: 2 pages in 7m 16s' and lists 'LiveChat Pricing | LiveChat Plans'.

Message area

Here you type in the messages you want to send to the customer, add emojis, upload files, use canned responses and whisper to your teammates.

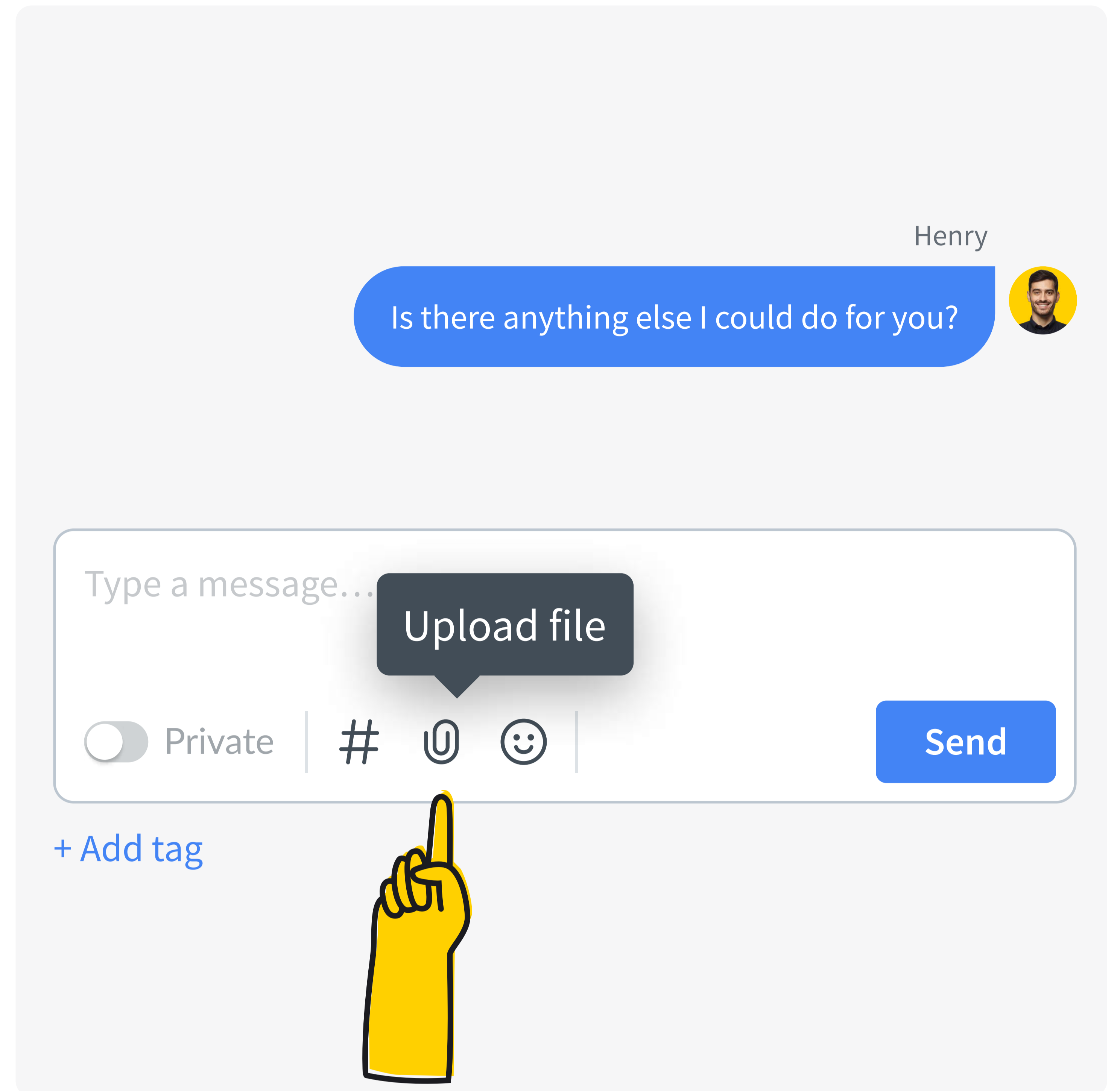
Canned responses

Canned responses can take your customer support to the next level. Learn all about them in [Team collaboration](#).



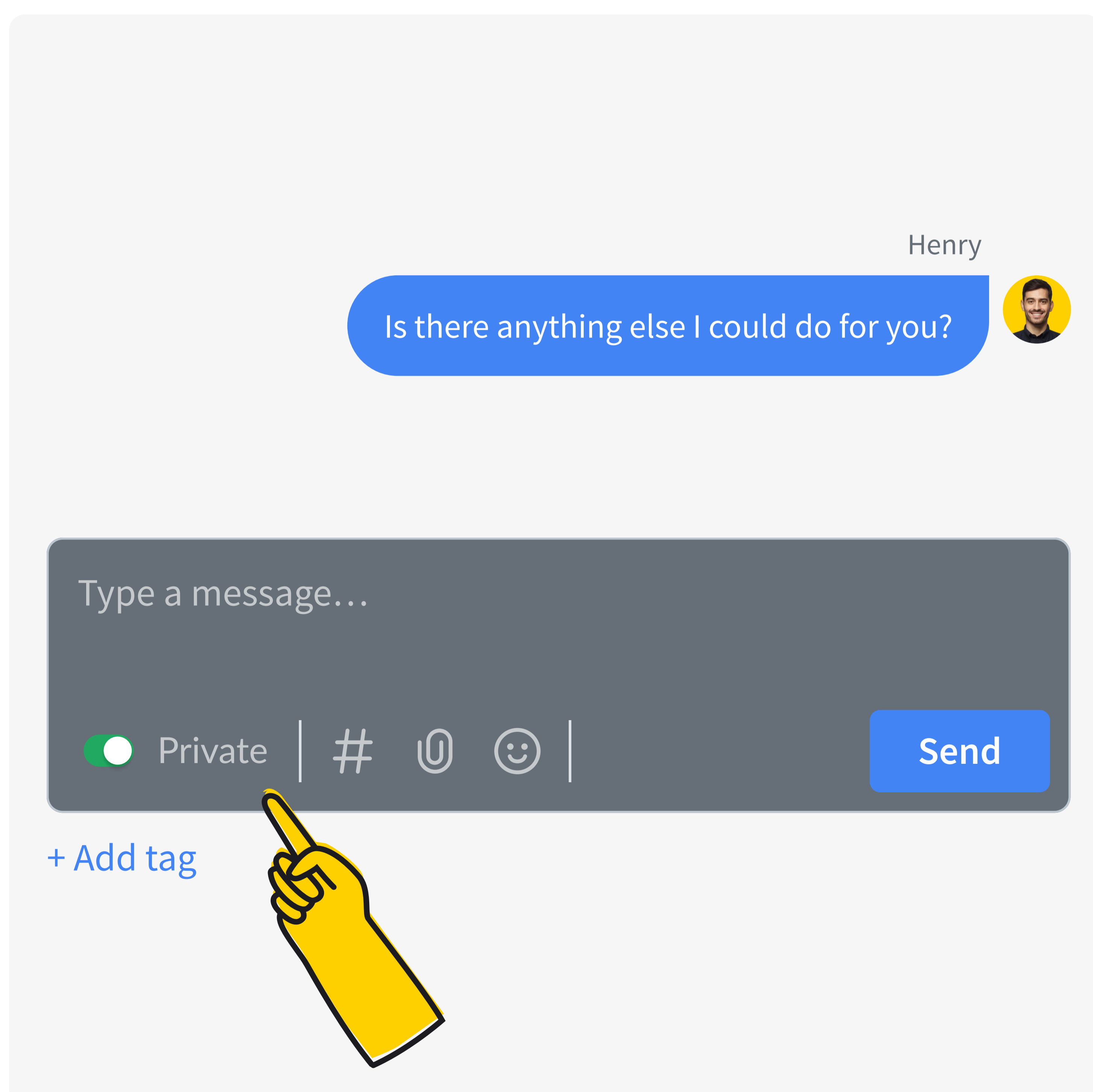
Attachments

If you need to send a file to the customer, just attach it right in the chat. You can upload files up to 10MB to send them in chat.



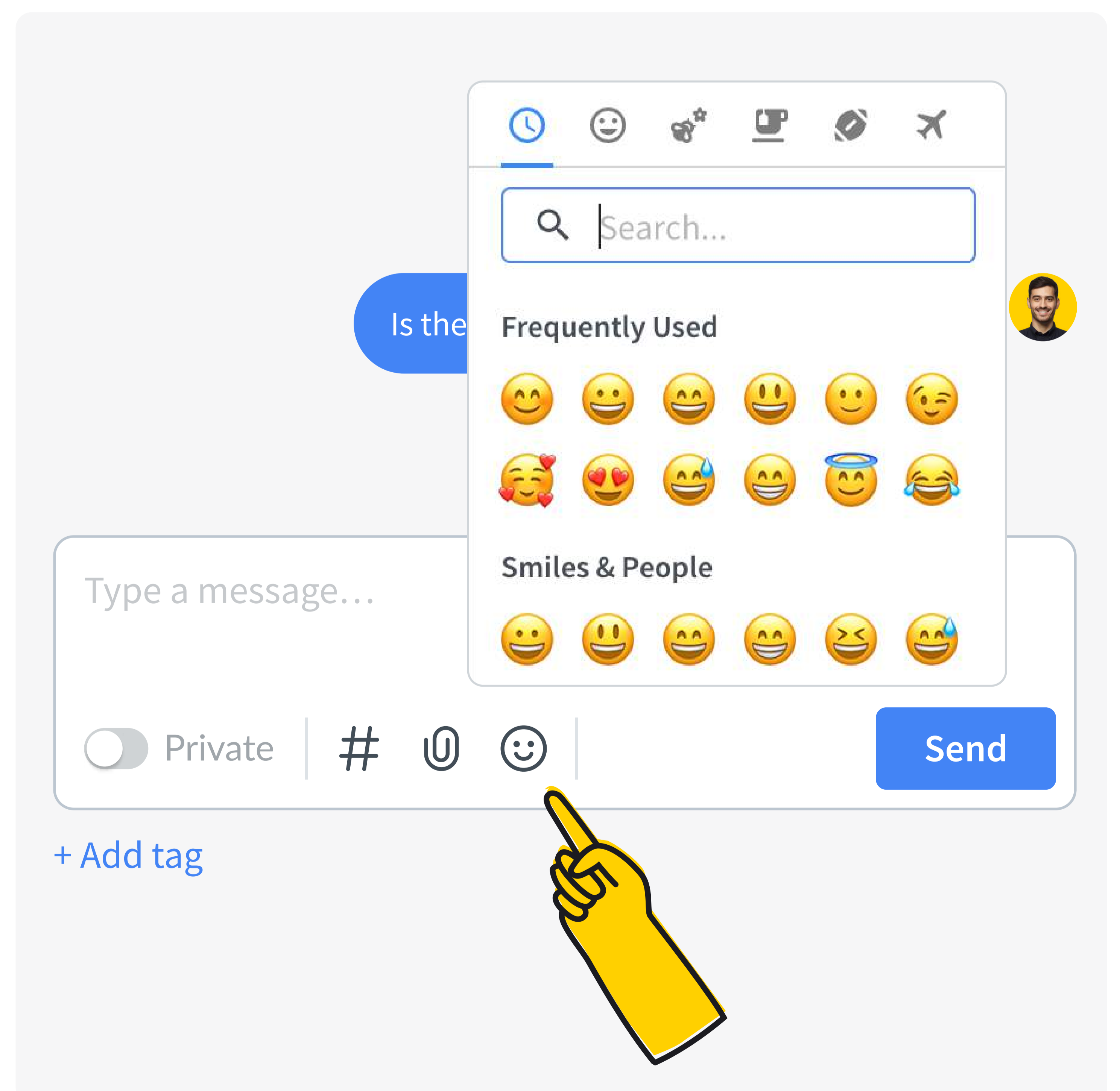
Private messages

When a teammate supervises your chat, you can switch the toggle to Private to send them a message the customer won't see. For more, see [Team collaboration](#) below.



Emojis

One rule of good customer relations is mirroring your customer's language. If they use emojis, be sure to respond in kind using our emoji picker!





Take individual approach

It's always a good idea to take an individual approach. Address the customer with the name they provided in the pre-chat to make them feel welcome.



Mirror customer's language

Mirroring customer's language goes beyond using emojis. Whether the customer is formal and serious or informal and makes jokes, respond in kind.

Customer details

Here you will find all the information about your customers.

The screenshot shows a chat window for a customer named Kate Morgan. The chat history includes a greeting from Henry: "Hello! How may I help you?" and a customer response: "g shoes, size 13." Henry responds with: "Profile > Settings > Push notifications witch to off. Simple as that." The customer details sidebar on the right is titled "Details" and contains the following information:

- General Info**
 - Profile picture: KM
 - Name: Kate Morgan
 - Email: kate.morgan@mail.com
 - Time: 1:32 pm local time
 - Location: New York, NY, United
- Map**: A map showing the location at 228 Park Avenue South in Hell's Kitchen, Midtown, Lower Manhattan.
- Pre-chat survey**
 - Your name: Kate Morgan
 - E-mail: kate.morgan@mail.com
- Visited pages**
 - Visits: 2 pages in 7m 16s
 - LiveChat Pricing | LiveChat Plans (www.livechatinc.com/)
 - LiveChat Partner Program (www.partners.livechat.com/)

Customer details

You can check their email address, location, the page they are currently on, and much more.

Customize data

You can adjust the type of information displayed in this area as well as the order in which particular segments appear. Read all about it [here](#).

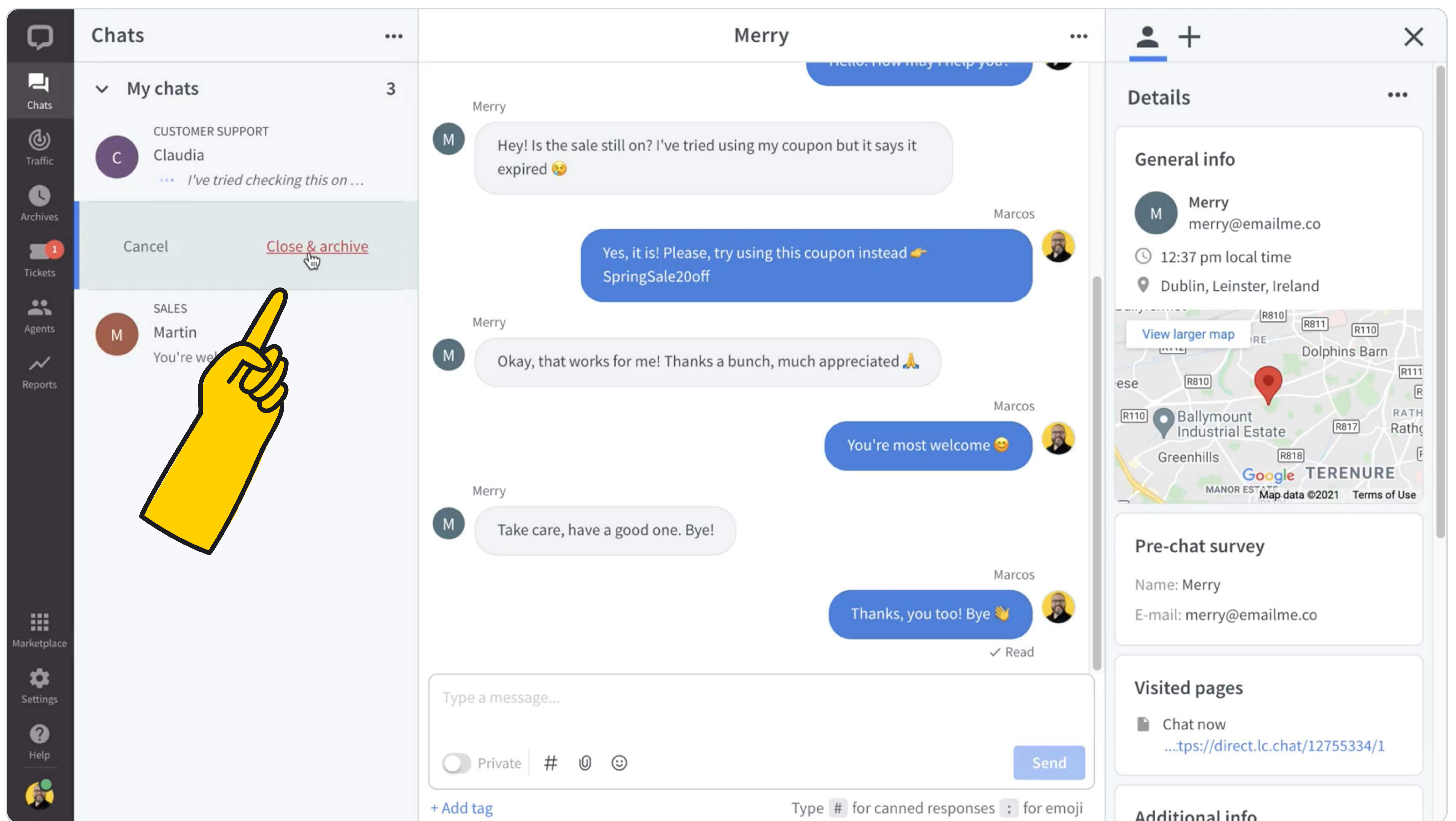
CRM

You can also forward leads into your CRM or view customer information from your company's CRM, if it has been integrated with LiveChat. You can read more about it [here](#).

How does a chat end?

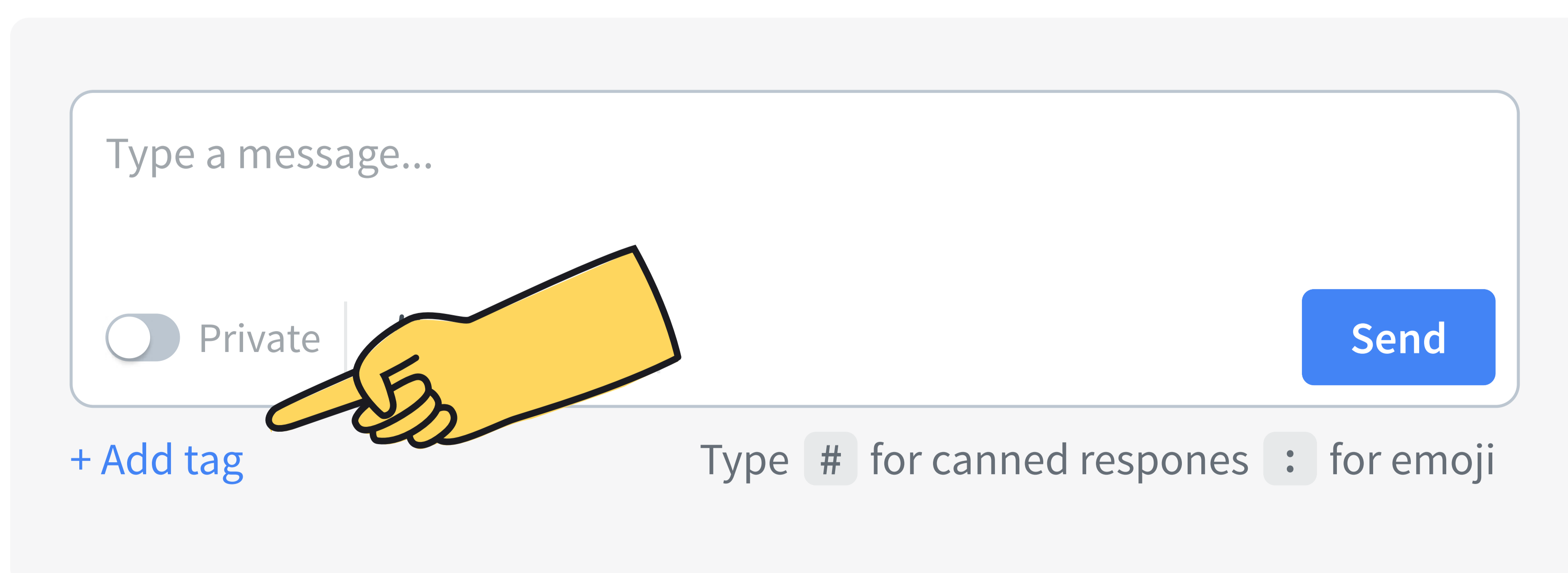
A chat ends:

- ✔ When the **customer closes** the chat widget on your website.
- ✔ When they **leave your website**.
- ✔ The chat will close automatically when there are **no new messages sent in a given time**. Ask your team leader how this is set for your team. Read more about inactivity timeouts [here](#).
- ✔ You can close the chat at your end. Find it on the list and click the ✕ in the top right corner. If the chat hasn't been closed by the customer or an inactivity timeout, you'll be asked to confirm closing the chat. Click **"Close and archive"** to close the chat and remove it from your list.



Tag your chats

Before you close the chat, remember to **tag** it to let the rest of your team know what the chat was about. Learn more about tags [here](#).



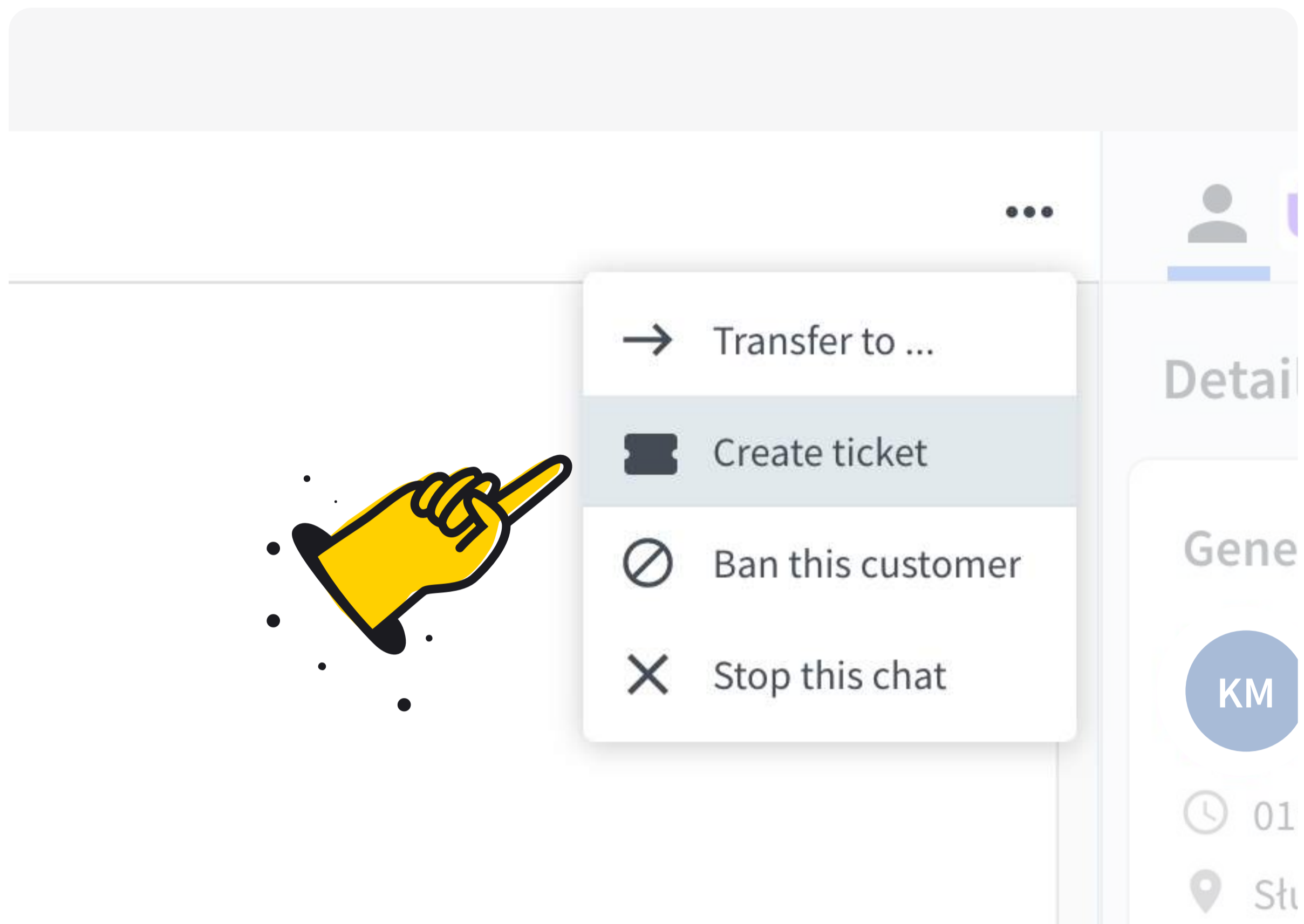
Tickets



Where do tickets come from?

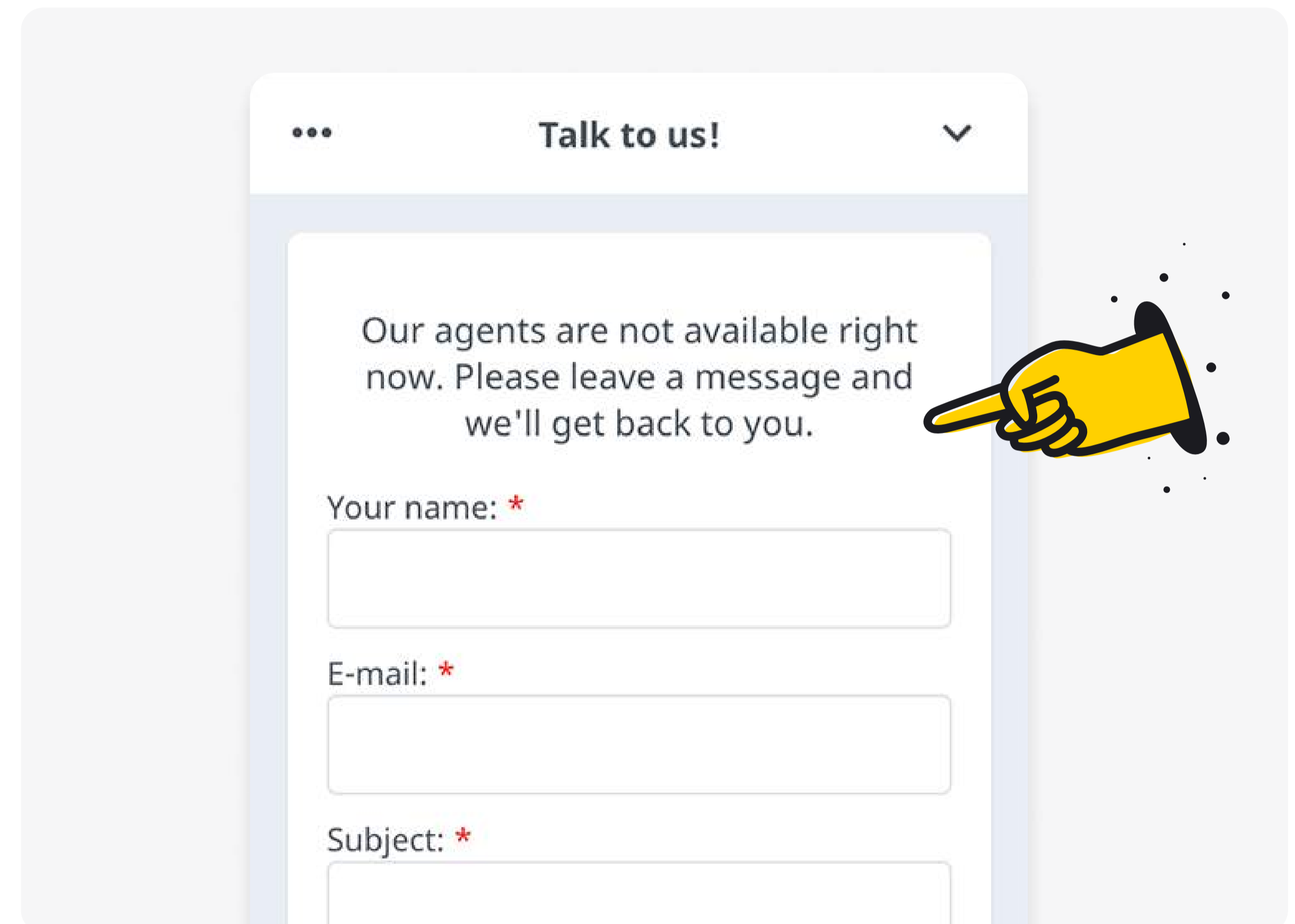
Tickets are usually cases that take more than one chat to finish. Sometimes you need to consult a colleague or a supervisor, sometimes both you and the customer need to wait for something to happen. It is our experience that customers don't mind waiting as long as they know what they are waiting for, and approximately how long it will take.

There are **four ways** you can receive a ticket:



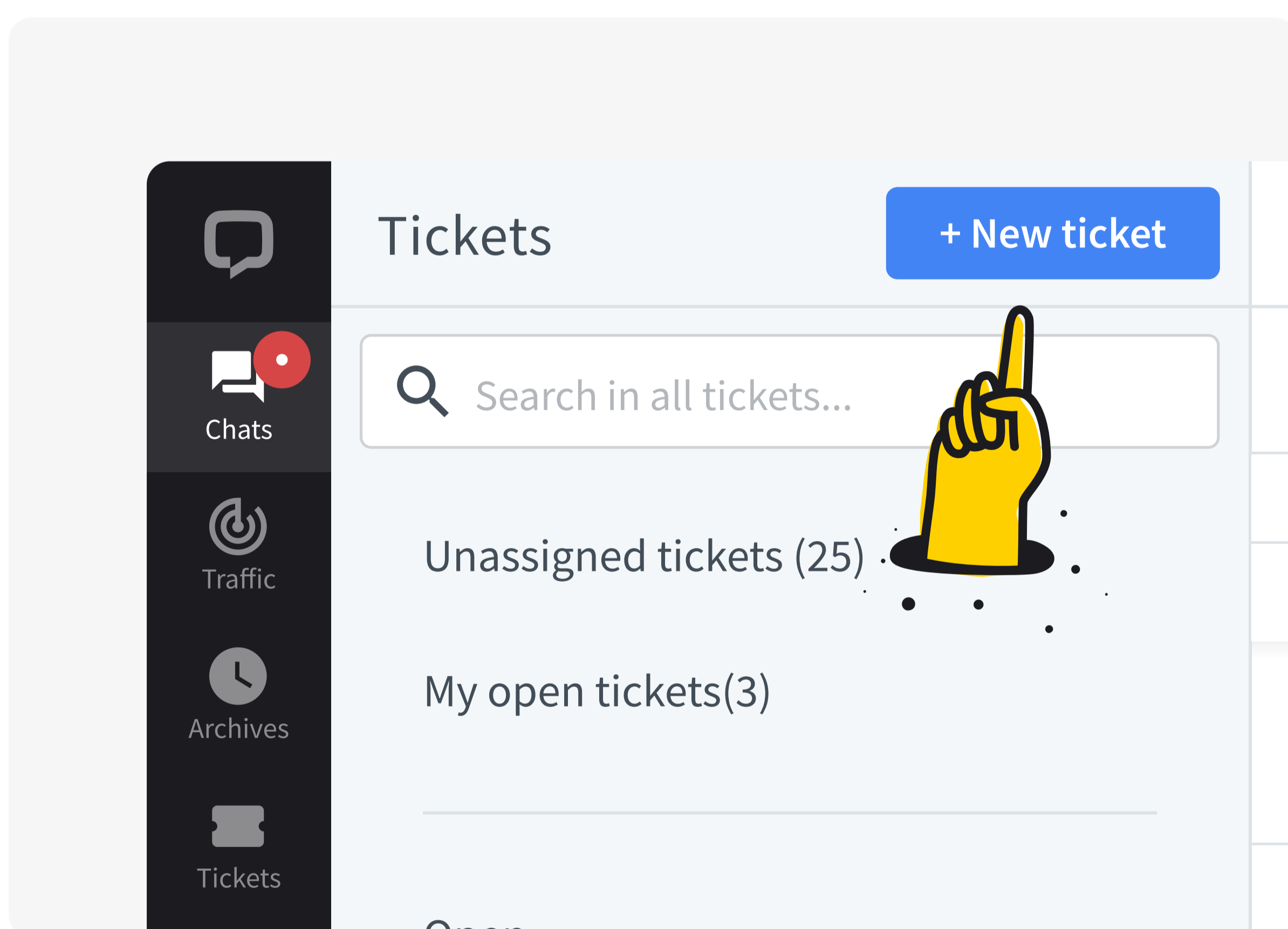
From chat

You can create it manually during chat or from Archives by clicking on the **...** button and selecting Create ticket.



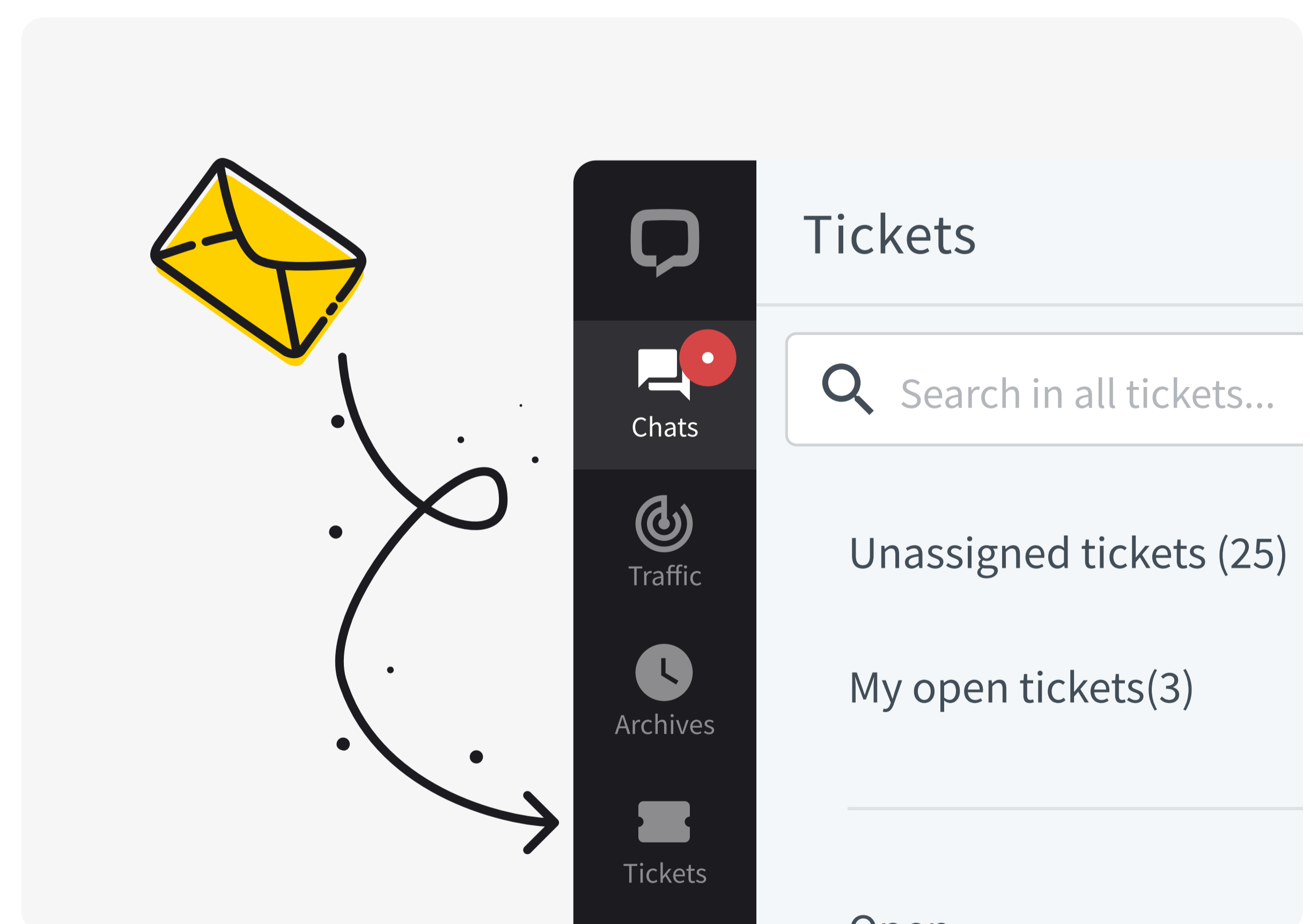
From ticket form

Customers can leave a message in the ticket form on your website when your team is off duty (no one is available to chat and the ticket form is enabled).



From Tickets

You can click on the New ticket button in the Tickets section.



Form your inbox

Your company may forward your support emails into LiveChat as tickets.

Tickets section in the LiveChat Agent app

The screenshot displays the LiveChat Agent app interface. On the left is a vertical sidebar with navigation icons for Chats, Traffic, Archives, Tickets, Agents, Reports, Marketplace, Billing, Settings, and Help. The main area is split into two panels: a chat window on the left and a details panel on the right.

Chat Window:

- Header: "Promo code" with an edit icon.
- Message 1 (John Smith, 2 minutes ago): "Message: Hi, I received a promo code on your website, but when I enter it on checkout page it does not work"
- System Message (1 minute ago): "Marcos assigned ticket to Marcos"
- Message 2 (Marcos, less than a minute ago): "Hi, we have a small issue with promo code generator, I will get back to you as soon as it is fixed. Kind regards, Marcos"
- System Message (less than a minute ago): "Marcos changed ticket status from Open to Pending"
- Message 3 (Marcos, less than a minute ago): "Add 5% discount as an apology."

Details Panel:

- Ticket info:** Ticket ID: LHOPQ [Copy URL](#), Created: 25 May 2021, Last message: 25 may 2021, Status: Pending, Source: [Ticket form](#)
- Tags:** return sales [+ Add tag](#)
- Assignee:** [Change](#) Henry (h.jones@livechat.com)
- Groups:** [Edit](#) General
- Requester:** [Change](#) John Smith (johns@email.com) [+ Add more people](#)

Input Area:

- Text input: "Type a message..."
- Buttons: Private, #, @, emoji
- Ticket status: Pending (dropdown), Send
- Footer: Type # for canned responses, emoji for emoji

This is a zoomed-in view of the details panel from the screenshot above. It shows the following information:

- Ticket info:** Ticket ID: LHOPQ [Copy URL](#), Created: 25 May 2021, Last message: 25 may 2021, Status: Pending, Source: [Ticket form](#)
- Tags:** return sales [+ Add tag](#)
- Assignee:** [Change](#) Henry (h.jones@livechat.com)
- Groups:** [Edit](#) General
- Requester:** [Change](#) John Smith (johns@email.com) [+ Add more people](#)

Ticket info

Basic information regarding the ticket and its current state.

Assignee

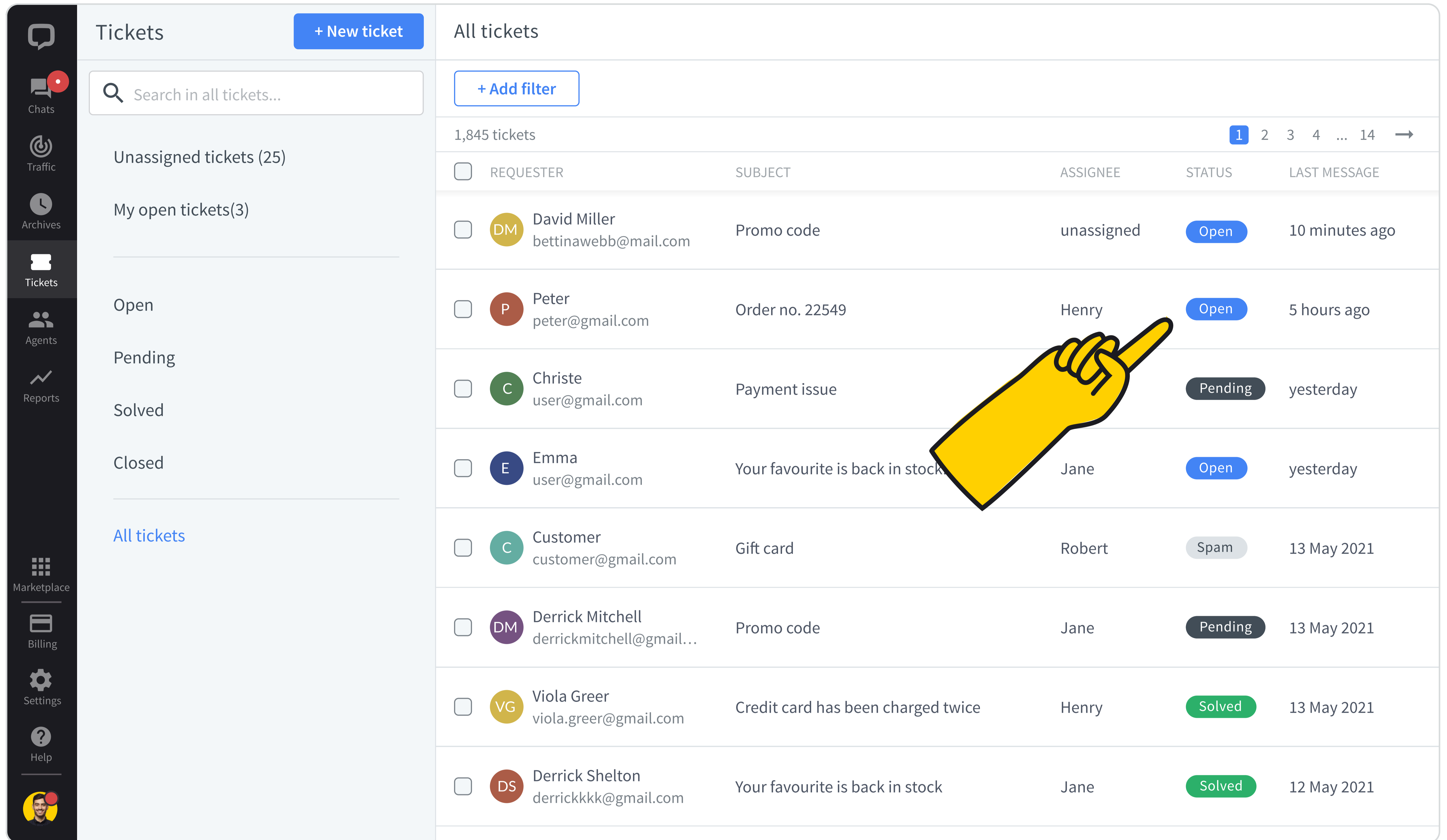
The person responsible for the ticket. To change the assignee, click on Change.

Requester

The customer requesting the ticket. You can change the customer's email at any time (e.g. when the customer wants you to follow up on the issue with their colleague), you can also add more people to the loop.

Tickets workflow

The status of tickets changes automatically as you work.



REQUESTER	SUBJECT	ASSIGNEE	STATUS	LAST MESSAGE
David Miller bettinawebb@mail.com	Promo code	unassigned	Open	10 minutes ago
Peter peter@gmail.com	Order no. 22549	Henry	Open	5 hours ago
Christe user@gmail.com	Payment issue		Pending	yesterday
Emma user@gmail.com	Your favourite is back in stock	Jane	Open	yesterday
Customer customer@gmail.com	Gift card	Robert	Spam	13 May 2021
Derrick Mitchell derrickmitchell@gmail...	Promo code	Jane	Pending	13 May 2021
Viola Greer viola.greer@gmail.com	Credit card has been charged twice	Henry	Solved	13 May 2021
Derrick Shelton derrickkkk@gmail.com	Your favourite is back in stock	Jane	Solved	12 May 2021

Open

Every time you receive or create a ticket, it will have the Open status. This means that the case is ongoing and needs attention.

Pending

When you send a message to the customer, e.g., ask the customer for some additional information, the status of the ticket will change to Pending. As soon as you get an answer, it will switch back to Open. If the customer does not respond in three days, LiveChat will send an automatic reminder. If the customer still does not respond, the ticket status will be automatically changed to Solved after additional 4 days

Solved

When a case is finished, you can close the ticket by changing its status to Solved. The customer will be notified about it and asked to rate their experience.

Spam

If the ticket you received contains malicious and unwanted content, you can mark it as Spam. Use this status carefully, all emails from an address marked as spam will automatically be assigned this status in the future.



Is it spam?

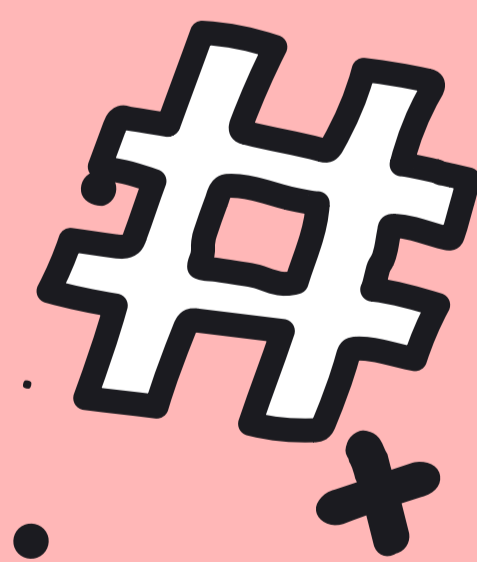
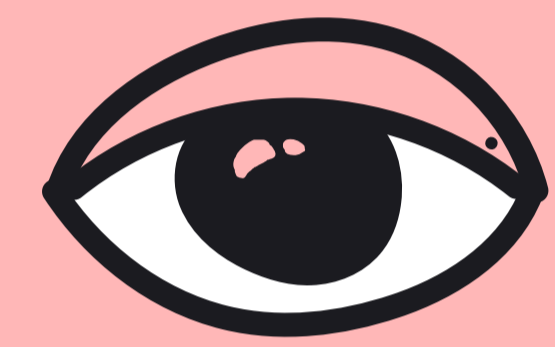
If a ticket is not malicious, but it's been sent by mistake, for example, it is better to switch its status to Solved without replying to it. In this case, the customer will not be notified that the ticket has been solved, but if they need your attention at another time, their email will not be blocked.



Connect with HelpDesk

If your team relies heavily on tickets and asynchronous communication in your everyday work, you might want to integrate LiveChat with [HelpDesk](#), another one of our products. It has more sophisticated customisation options, collaboration tools and automated workflows.

Team Collaboration

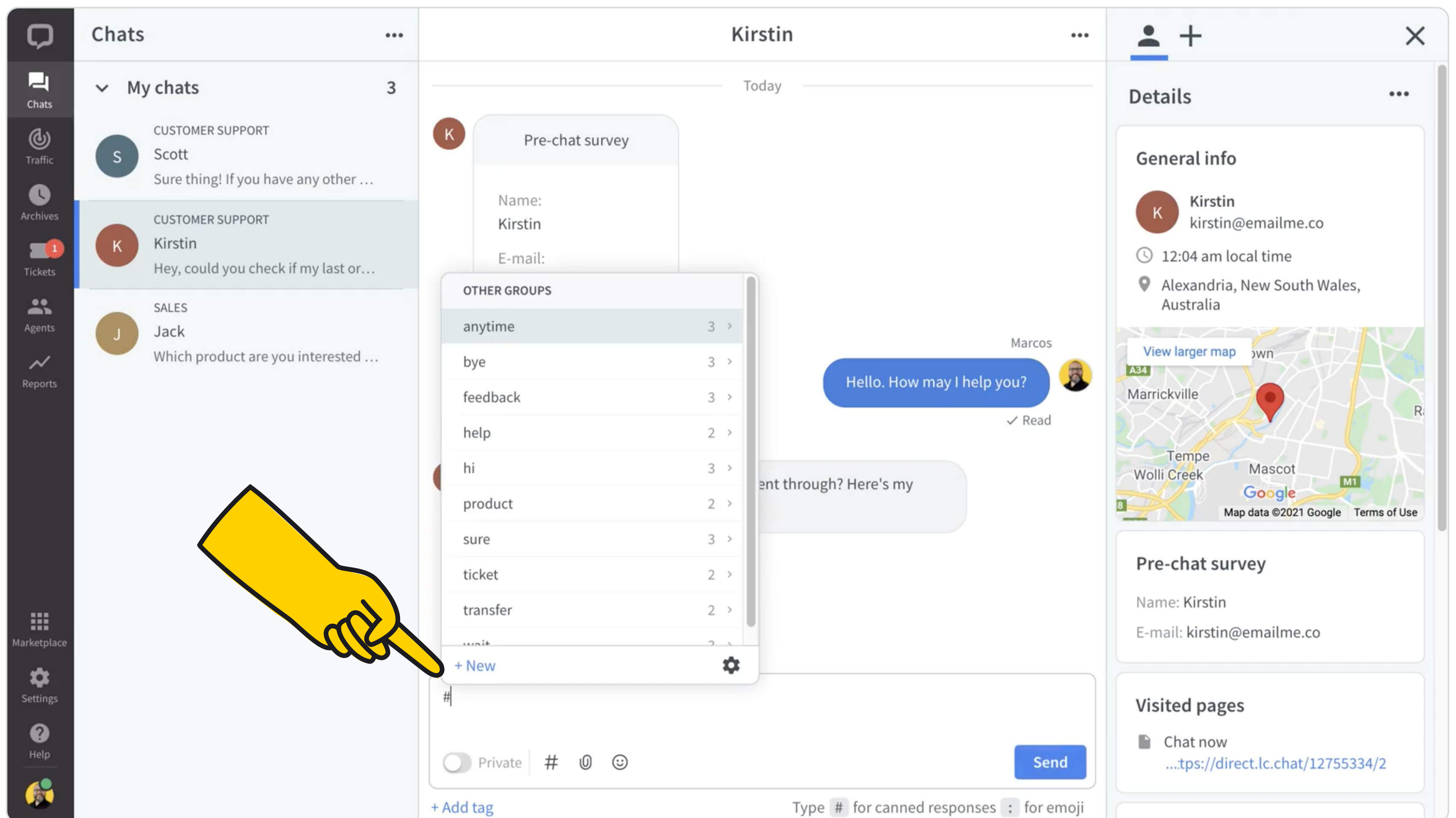


Teamwork

At LiveChat we truly believe that our greatest strength is our teamwork. This is why the LiveChat Agent app supports teamwork every step of the way.

Canned responses

Probably the biggest asset and time saver for your team will be the canned responses. They allow you to recall premade answers by typing in hash (#) and the shortcut for the desired response.



- Save answers to common questions, and save yourself the boredom of retyping the same content over and over again. Use the saved time to engage the customer, lifting both your moods at the same time.




Connect with ChatBot

By the way, if you get a lot of similar questions, perhaps your company could use our [ChatBot](#)? It will answer all those FAQs for you, letting you focus on more interesting cases.

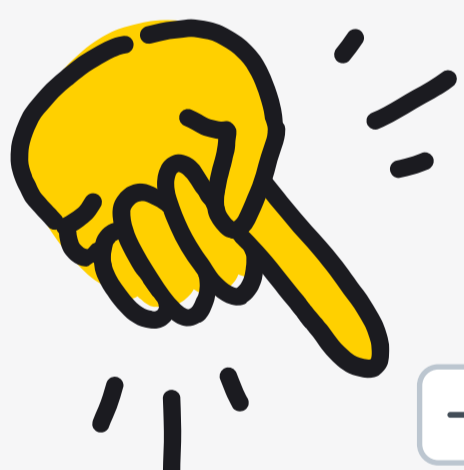
- **Save links to external resources**, e.g., your product sign up page, help center, FAQ, product pages, so you don't have to remember them or look for them when the customer requests them. Type #promo and the link is there.
- **Save multi-step instructions** as a canned response, but send them in manageable chunks. Avoid overwhelming the customer with a wall of text, especially if they are on mobile, which you can check in Details in the chat. Instead, divide the canned response and send it step by step. After all, you're only pasting the instructions, not typing them out. The instructions will be precise and free of typos, and you will not only look professional, but considerate and personable as well.
- **Use canned responses as a reference point** for the entire team, and especially newbies. With canned responses, you don't have to remember everything, just remember there is a canned response for that.
- **Ensure a consistent tone of voice throughout the team.** Canned responses can remind you how your company speaks to customers before it becomes second nature.

All of this leaves you more time for personal touch. Add the customer's name to your #hello, divide a multi-step instruction into manageable chunks and send them one by one, put the time you save on looking for links and information into engaging the customer. It is easy when you are secure in the knowledge that your voice is consistent throughout your team, without sacrificing the personality of individual team members.



Add canned responses on the go

Create canned responses on the go from chats whenever you notice that you use a phrase regularly and for those phrases you know you'll use, like "You're welcome" or "Hi there!"



Henry

Hi, we currently have a promotion for the iteam, take a look here: www.promo.com

Save as canned response

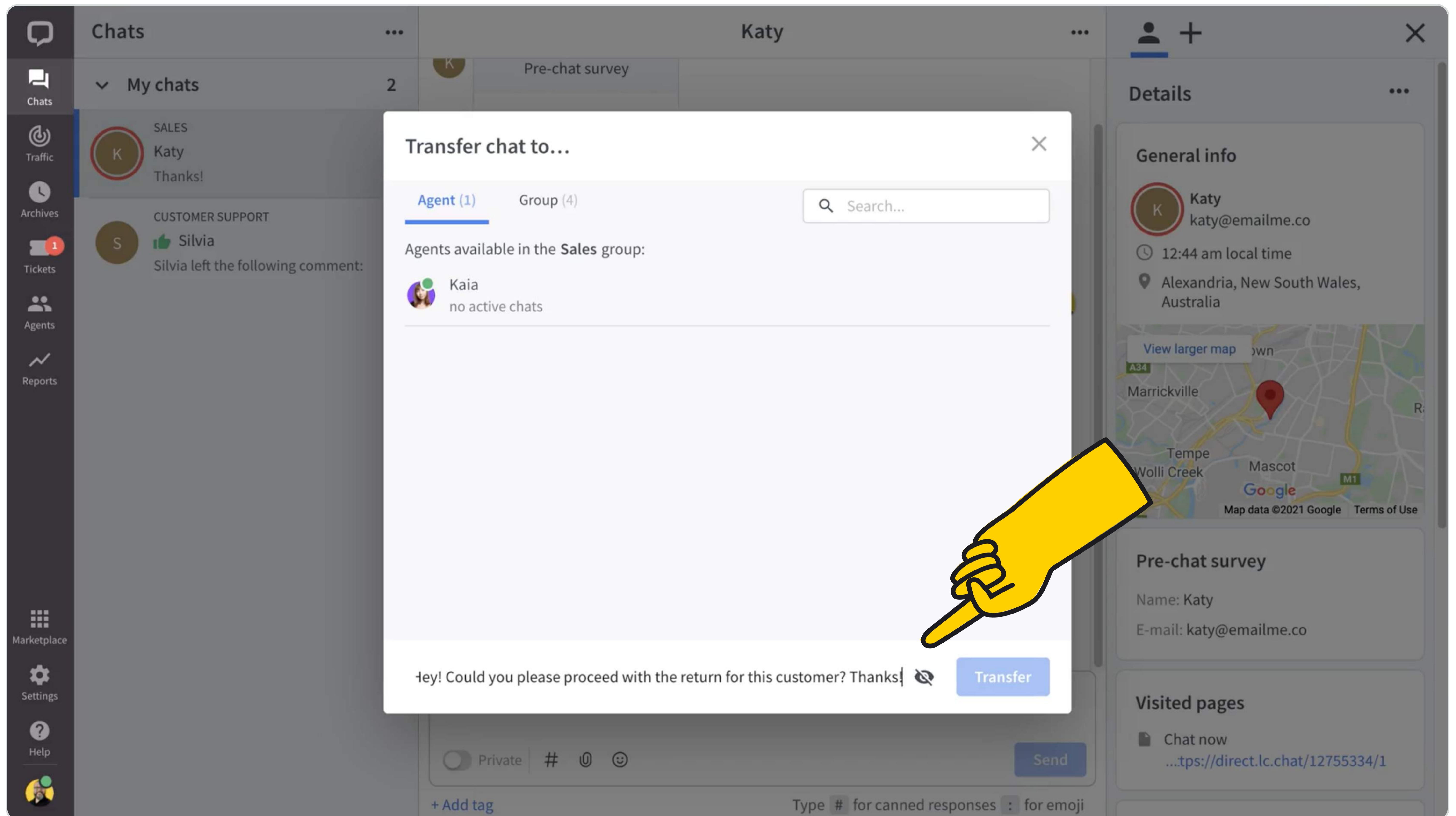
Type a message...

Private
@ 😊
Send

[+ Add tag](#)

Transfer

Depending on the workflow in your team, you may sometimes need to transfer the chat to another agent. You can do it by clicking ... on while the chat is ongoing, and picking Transfer.



Transfer carefully

Most of us don't like being bounced from one rep to the next, so when you transfer, make sure that the customer knows that they are being transferred. If it is relevant, provide the reason as well.



Keep the customer informed

If you are on the receiving end of a chat transfer, let the customer know that they don't need to explain the matter at hand again because you can see their chat thus far. Ask for a moment to read through the chat. If the customer knows why they need to wait they are more likely to be patient.



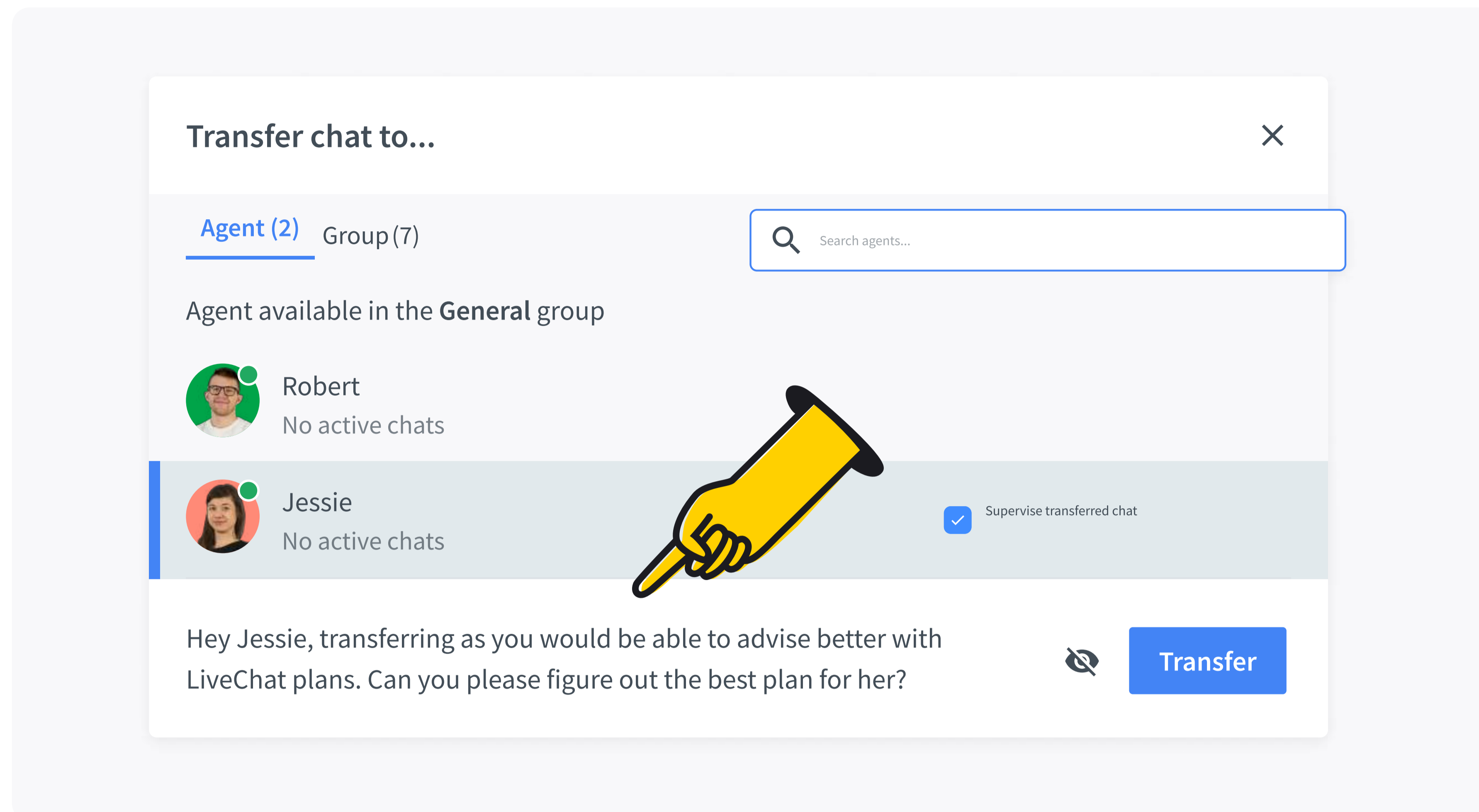
Organise your work

If you find yourself transferring chats often, ask your leader to consider using the Groups feature. With Groups customers can be directed to specific departments when they start a chat, or chats from specific websites can go to dedicated departments. [Read more about Groups in our Help Center.](#)



Tip off your teammates

Make sure that the teammate to whom you are transferring knows that they are about to get a chat. Let them know what the case is about in advance. You can use the option to **Add private note** in the transfer modal. Private note is available in our [Business and Enterprise plans](#).



Supervising

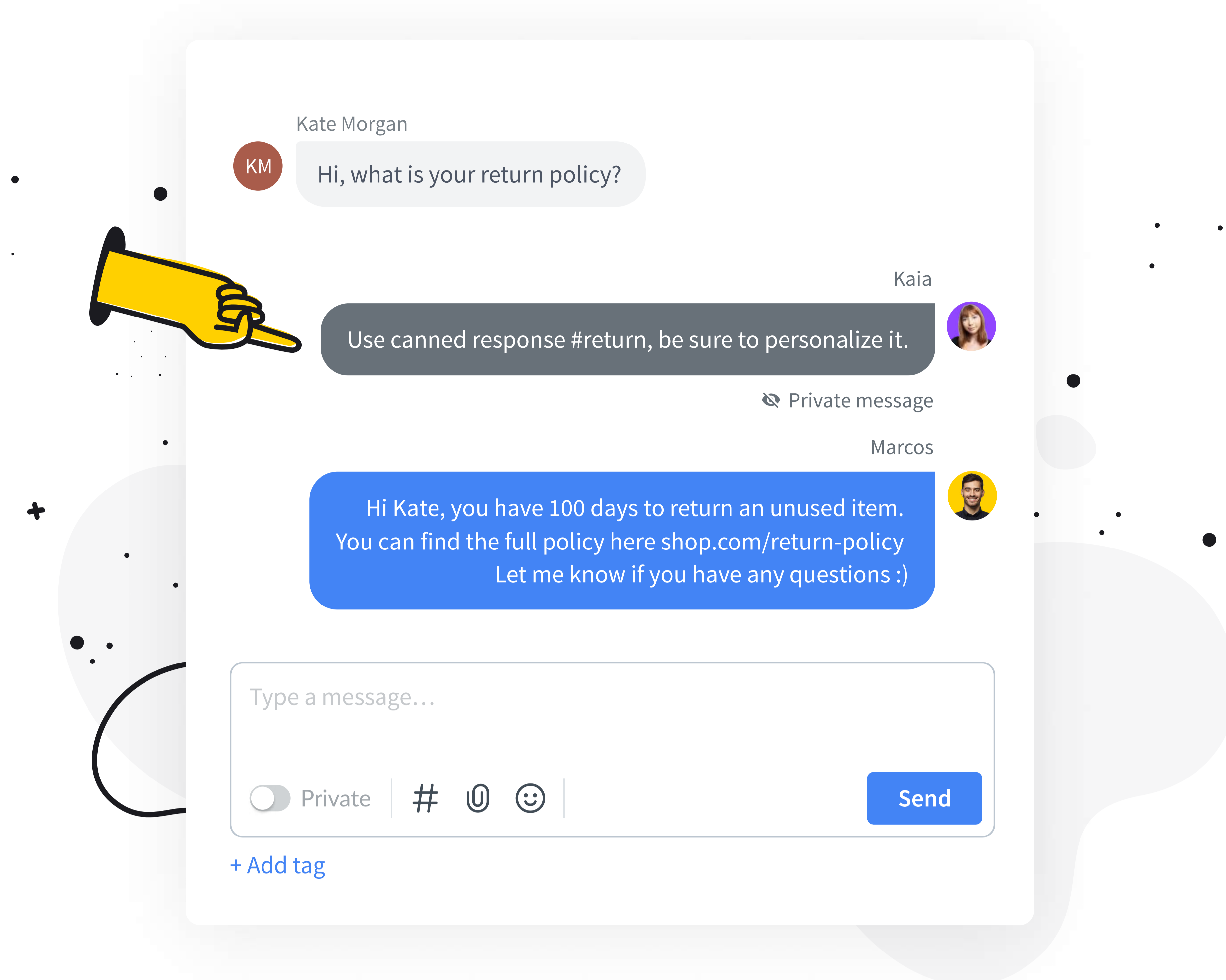
Another great way in which LiveChat facilitates teamwork is the fact that you can supervise the chats of your teammates.

Supervising chats is the best way to learn from real life examples how your team communicates with the customer, from the tone of voice of your company to at what point it is good to create a ticket or transfer to another colleague or team.

To supervise a chat, go to the Traffic section of the LiveChat Agent app. Click on Chatting, to see who is currently chatting, click **Supervise** on the chats you want to supervise, and then click on **Go to chat**.

NAME	ACTIONS	STATUS	ASSIGNED TO	LAST PAGE	Country	DEVICE	OS
KM Kate Morgan	Supervise chat	● Chatting	—	LiveChat Pricing	United States	Mobile	Android
NB Nina Boyd	Supervise chat	● Chatting	—	LiveChat Plans	Japan	Mobile	Apple
TF Toby Flenderson	Supervise chat	● Chatting	Henry	LiveChat Agents	United States	Desktop	Windows
PS Paul Smith	Go to chat	● Supervised	—	LiveChat Settings	Canada	Desktop	Windows
JS Josephine Spencer	Go to chat	● Supervised	—	LiveChat Pricing	India	Desktop	Apple
GC Garrett Craig	Go to chat	● Supervised	—	Marketplace	United Kingdom	Desktop	Windows
LP Lida Phelps	Go to chat	● Supervised	Jane	LiveChat Reports	China	Mobile	Windows

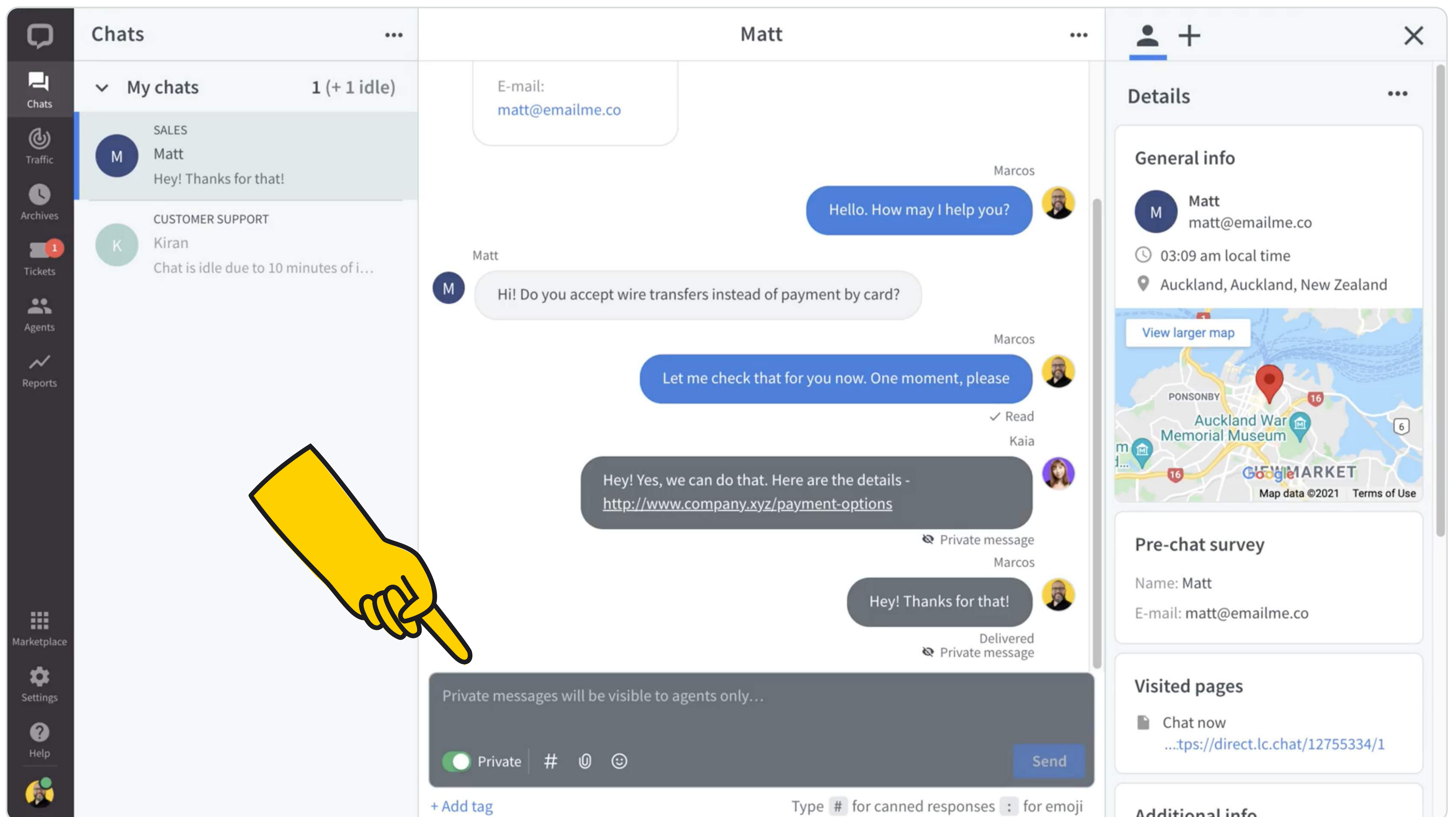
If you are dealing with a problematic case or a problematic customer, you can ask your teammates or supervisor to supervise your chat. They will be able to send you private messages, applying the strength of the team to the case at hand.



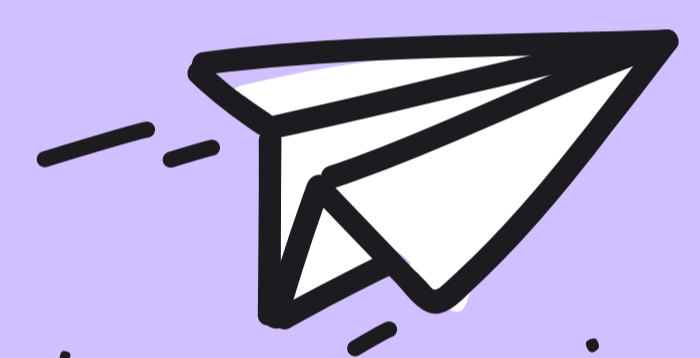
Read more about [supervision here](#).

To send a private message back, just switch your message area to Private with the toggle, type your message in and send.

Read more about it [here](#).



Bonus Tips



Traffic

Make sure to have a good look around the [Traffic](#) section of the LiveChat Agent app. This is the section where you can [manually invite customers](#) to chat and pick chats for [supervision](#). The Traffic section shows the list of current visitors on your website in real time. You can see their name, email address, location, time spent on your website, and much more.

The screenshot shows the LiveChat Traffic section interface. At the top, there are tabs for 'All customers (94)', 'Chatting (5)', 'Supervised (1)', 'Queued (1)', 'Invited (5)', and 'Browsing (80)'. Below the tabs is a filter section with 'Match all filters' and '+ Add filter'. The main area is a table with columns: NAME, ACTIONS, ACTIVITY, CHATTING WITH, LAST PAGE, Country, DEVICE, and OS. The table lists several customers with their names, initials, and various details. Callouts 1-4 highlight specific features: 1 points to the 'All customers (94)' tab, 2 points to the menu icon, 3 points to the '+ Add filter' button, and 4 points to the menu icon in the table header.

NAME	ACTIONS	ACTIVITY	CHATTING WITH	LAST PAGE	Country	DEVICE	OS
KM Kate Morgan	Start chat	Browsing	—	LiveChat Pricing	United States	Mobile	Android
NB Nina Boyd	Pick from queue	Queued (1 min)	—	LiveChat Plans	Japan	Mobile	Apple
TF Toby Flenderson	Go to chat	Chatting	Henry	LiveChat Agents	United States	Desktop	Windows
PS Paul Smith	Start chat	Browsing	—	LiveChat Settings	Canada	Desktop	Windows
JS Josephine Spencer	Start chat	Browsing	—	LiveChat Pricing	India	Desktop	Apple
GC Garrett Craig	Start chat	Browsing	—	Marketplace	United Kingdom	Desktop	Windows
LP Lida Phelps	Go to chat	Supervised	Jane	LiveChat Reports	China	Mobile	Windows

1

Customer list

Use it to spot prospective customers or simply make their customer experience better.

2

Customize view

Add, remove, change the order of data columns. See what is relevant to your everyday work.

3

Filters

Filter the view by things like the customer's location, or the number of visits etc., to target a specific segment of customers.

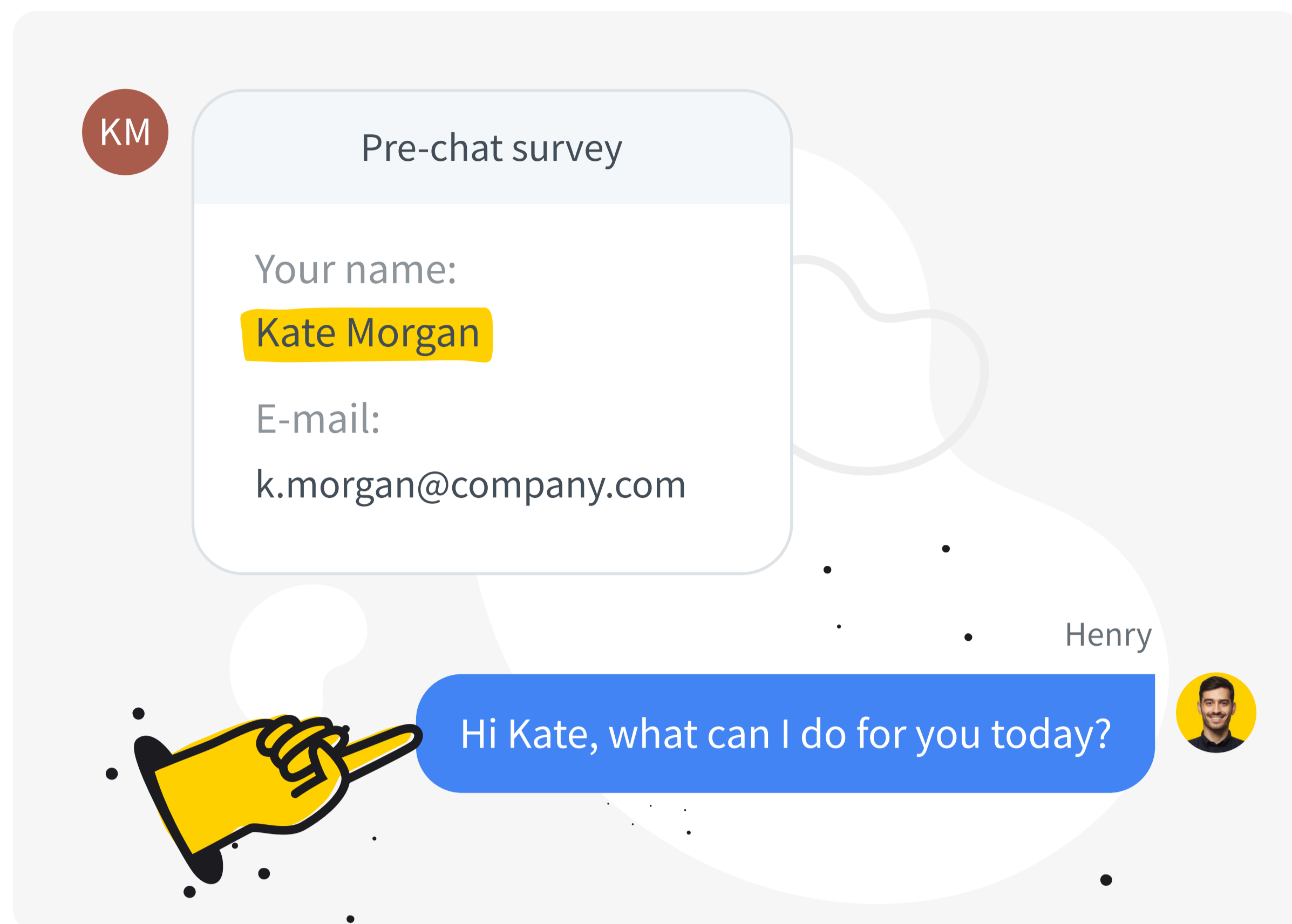
4

Segments

Spot prospective customers or simply make their customer experience better.

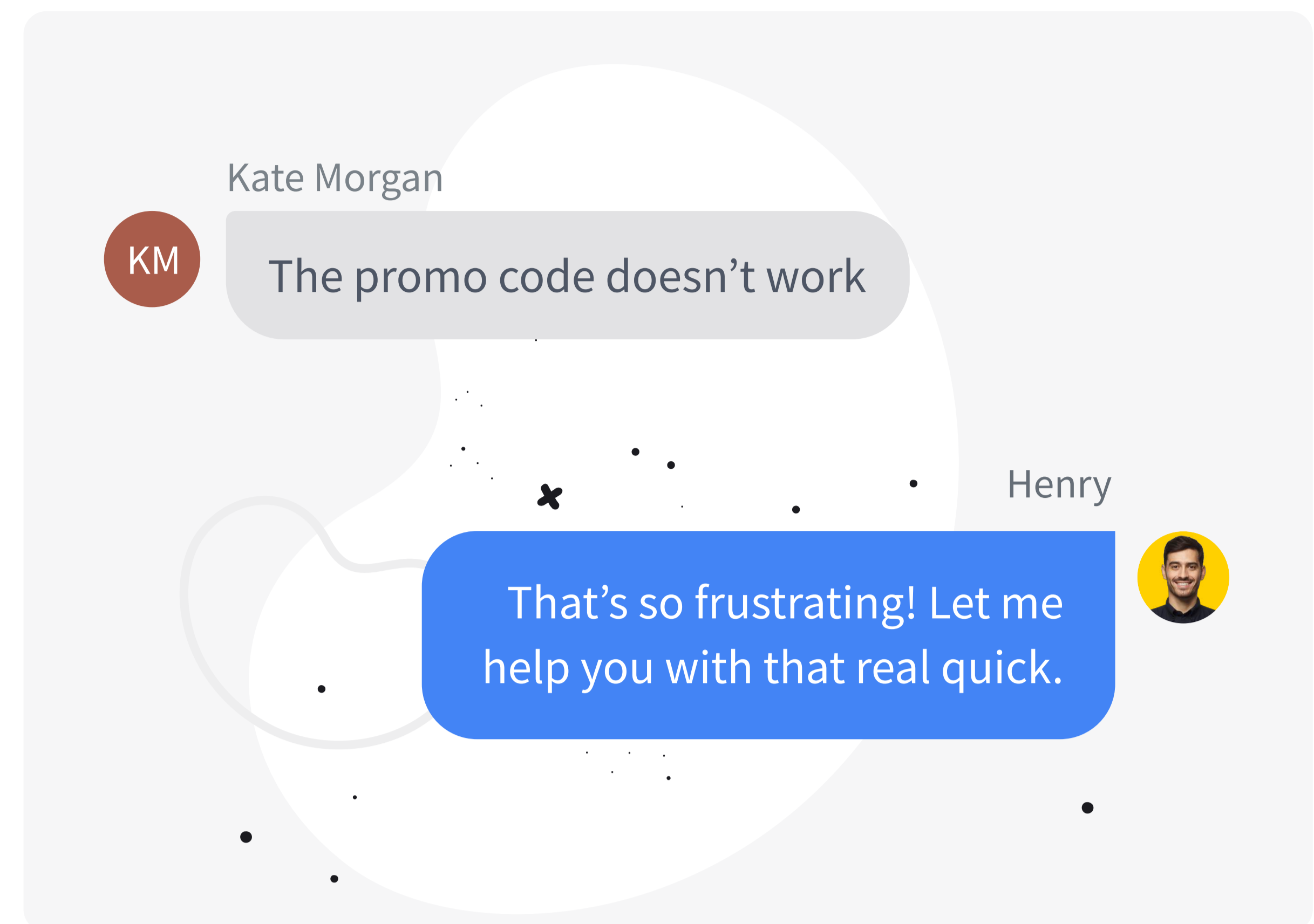
Read more about the Traffic [section here](#).

Everyday work:



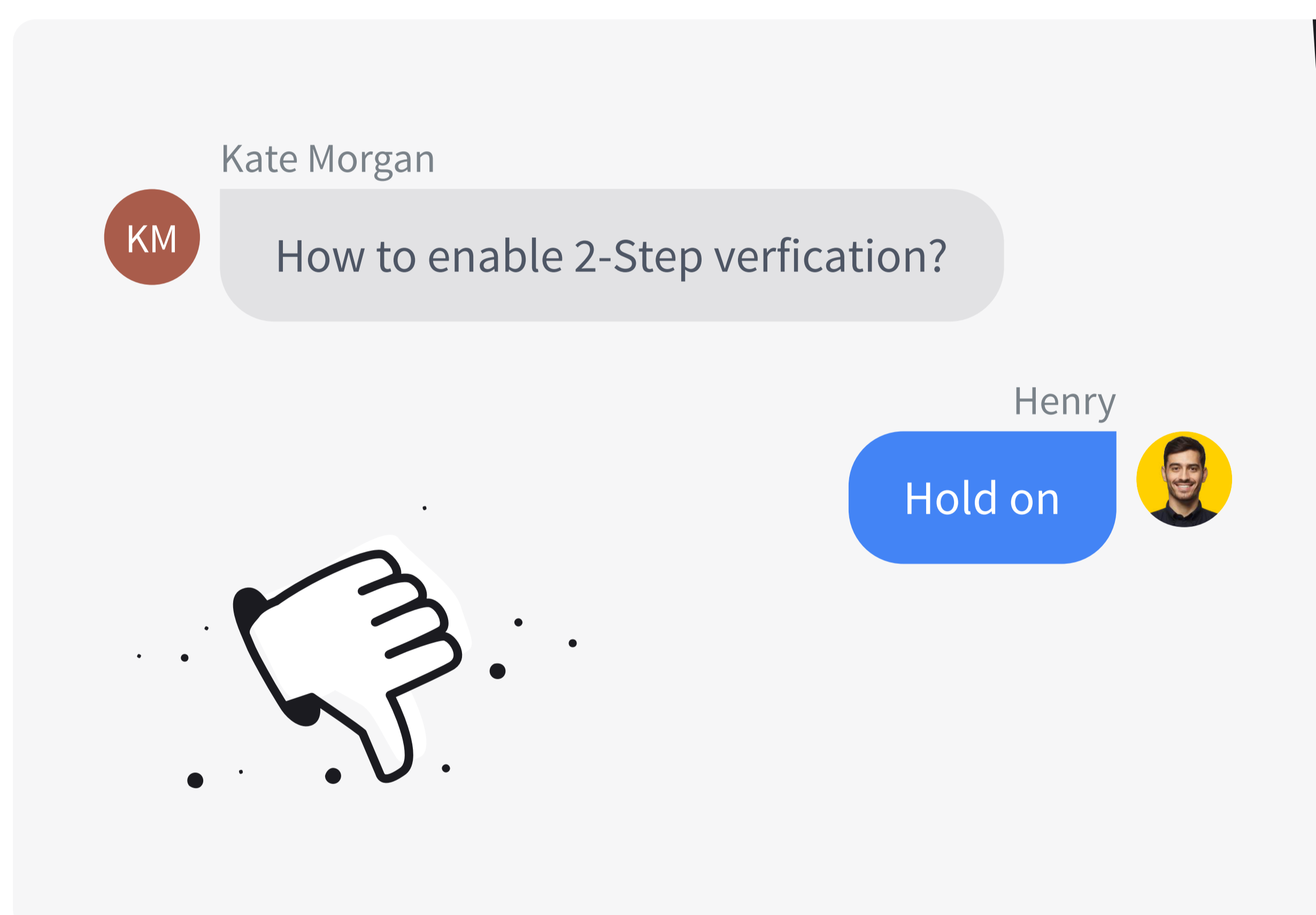
Make it personal

If the customer provided their name in the pre-chat, use it.



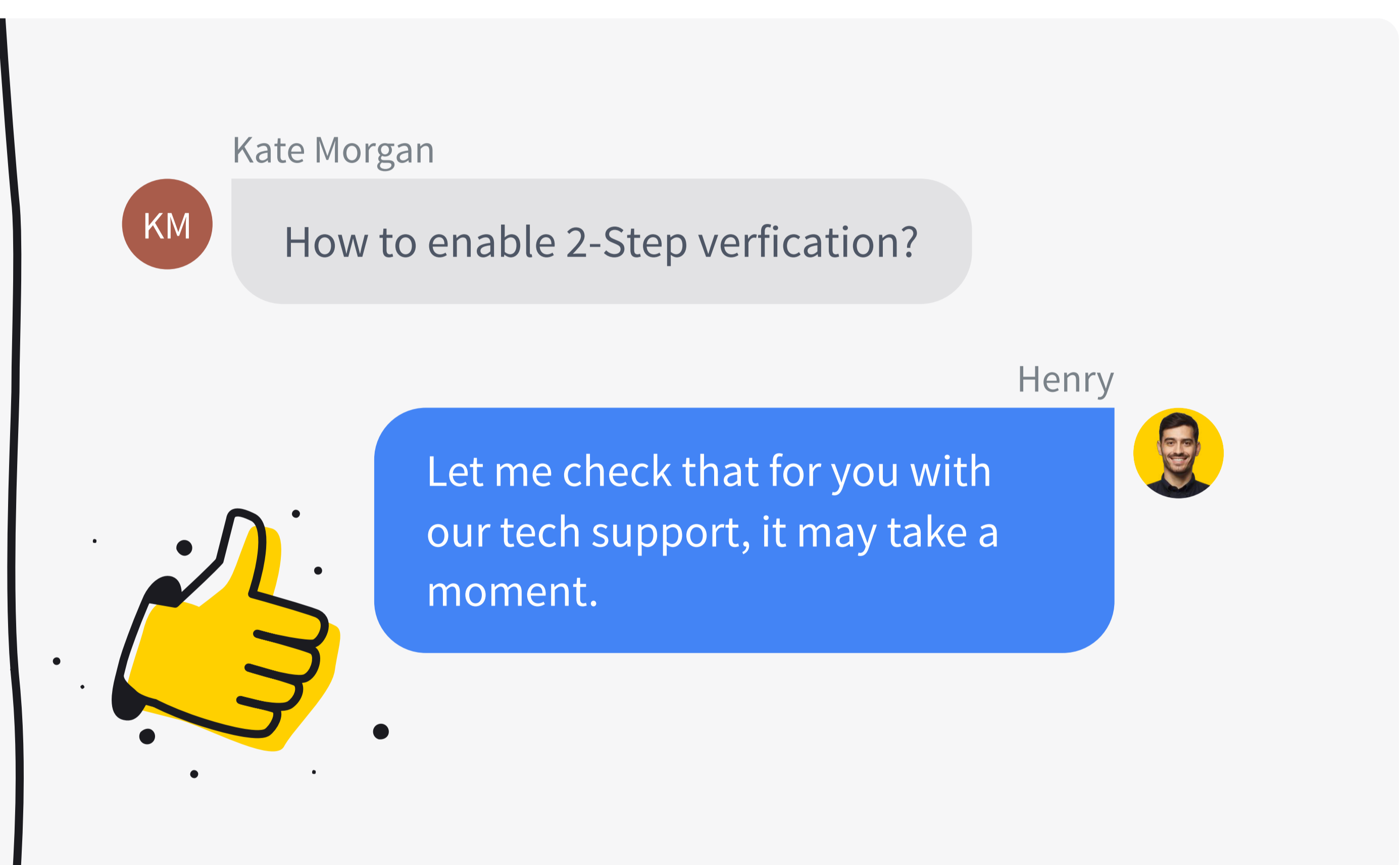
Put yourself in their shoes

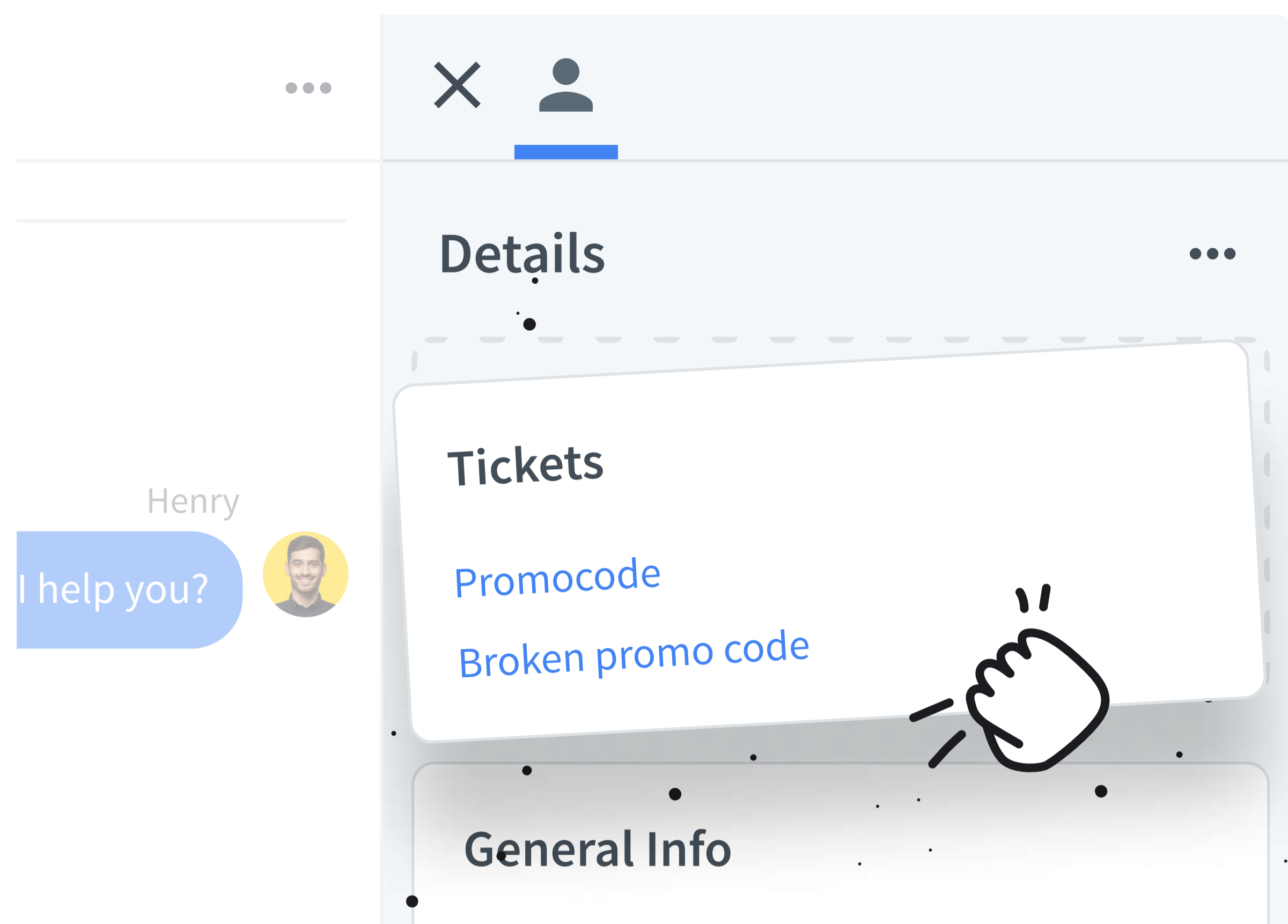
As much as you can, try to look at every query from the customer's perspective.



Be transparent

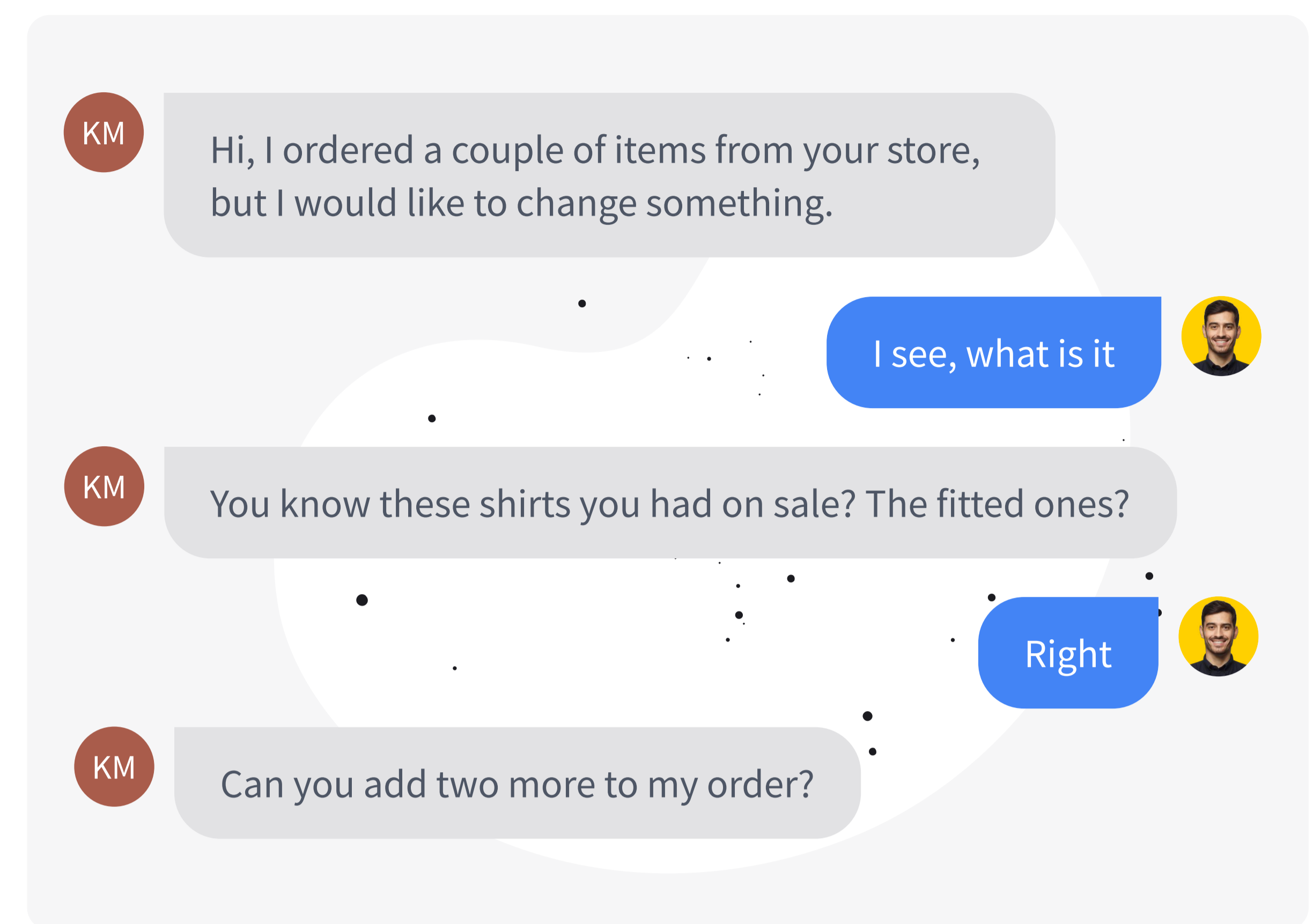
Speedy service makes a good impression, but being precise is even better. When you need the customer to wait a moment, let them know what you're doing.





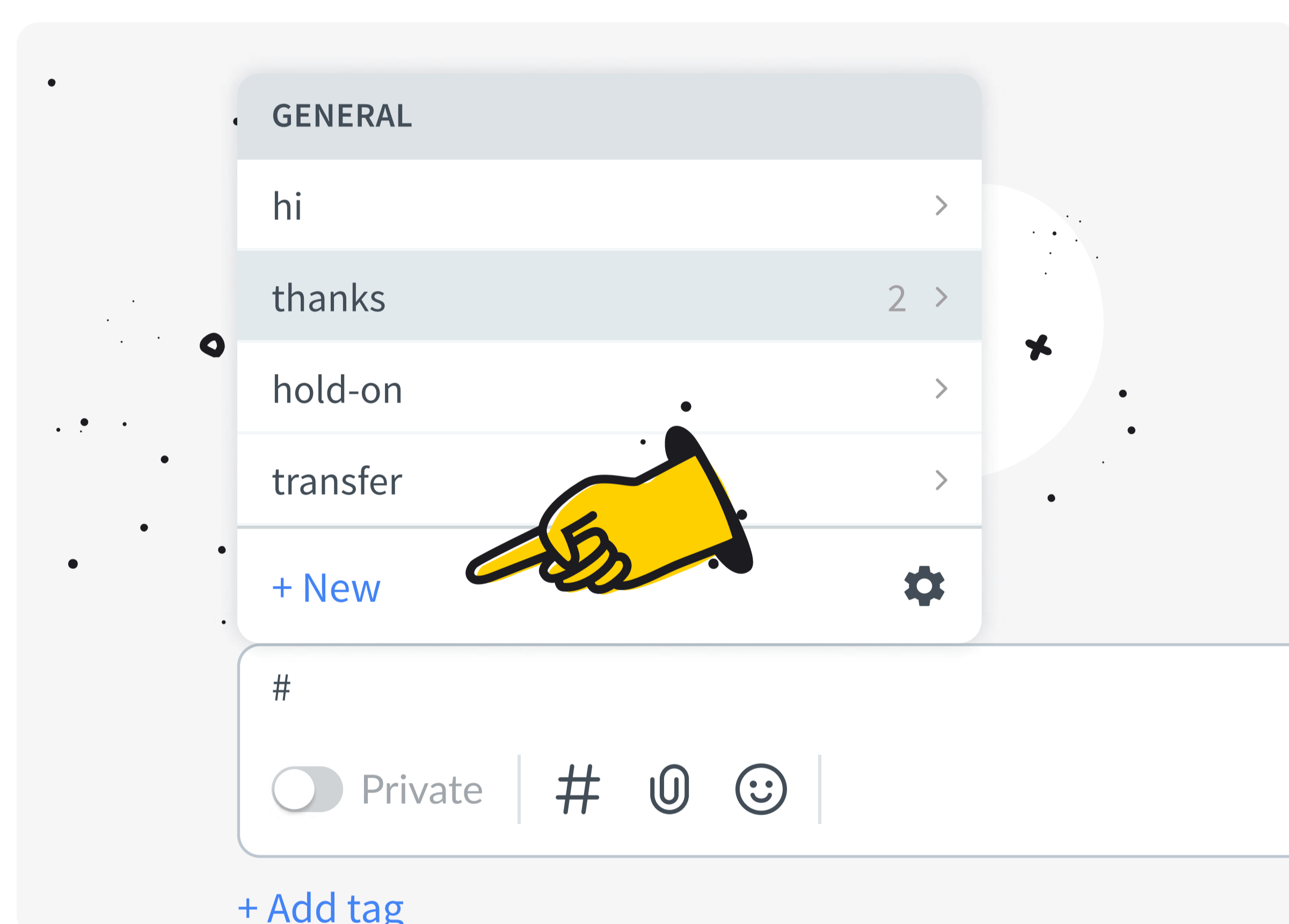
Customise details

Edit the [Details](#) section to only show the relevant information on the tiles you want. For example, move the Tickets tile to the top of the list to know immediately if the customer has tickets with your team.



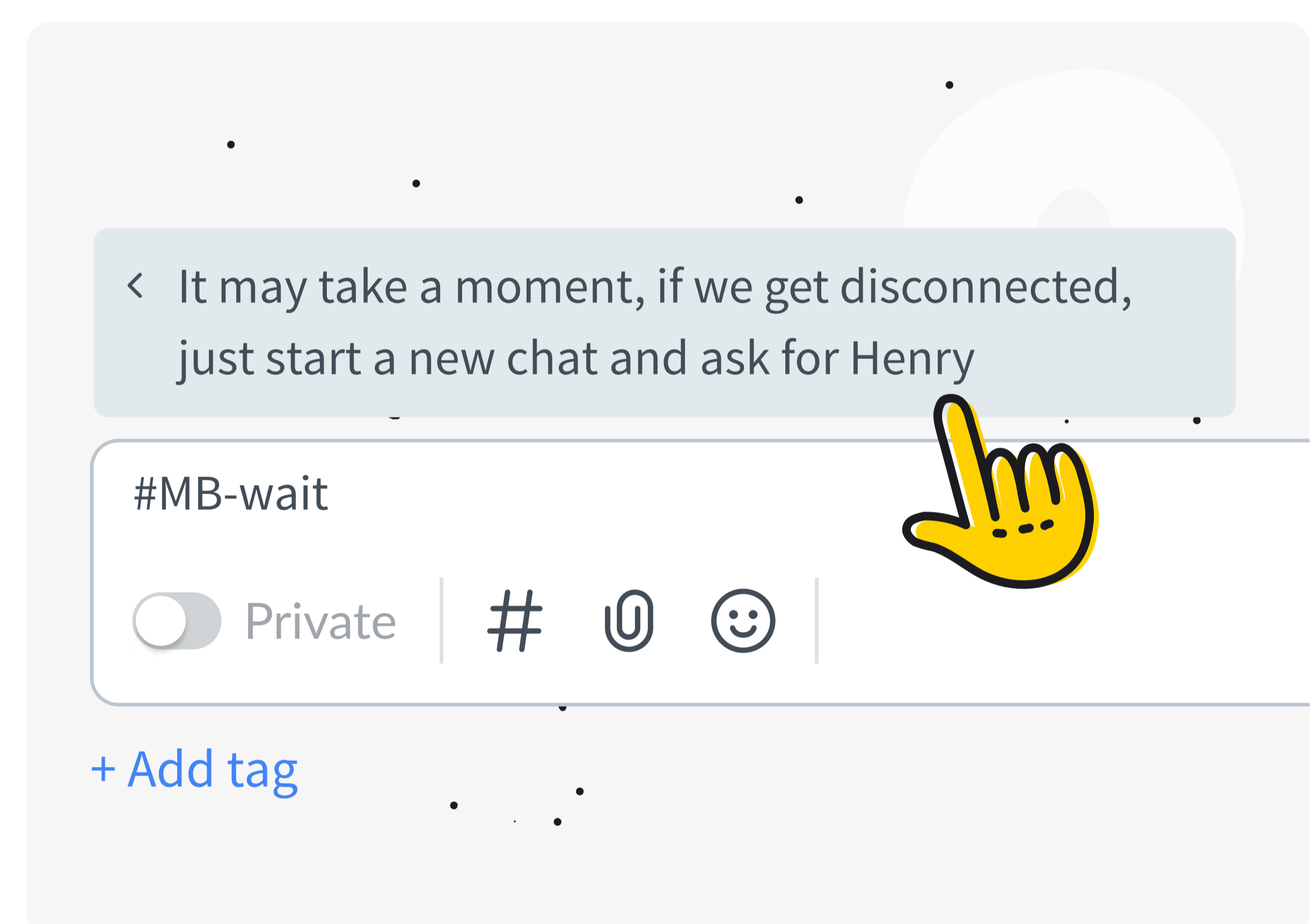
Listen actively

Let the customer know you're there and you're listening. Providing feedback while the customer explains a complicated case can make the customer's experience great



Create canned responses from chat

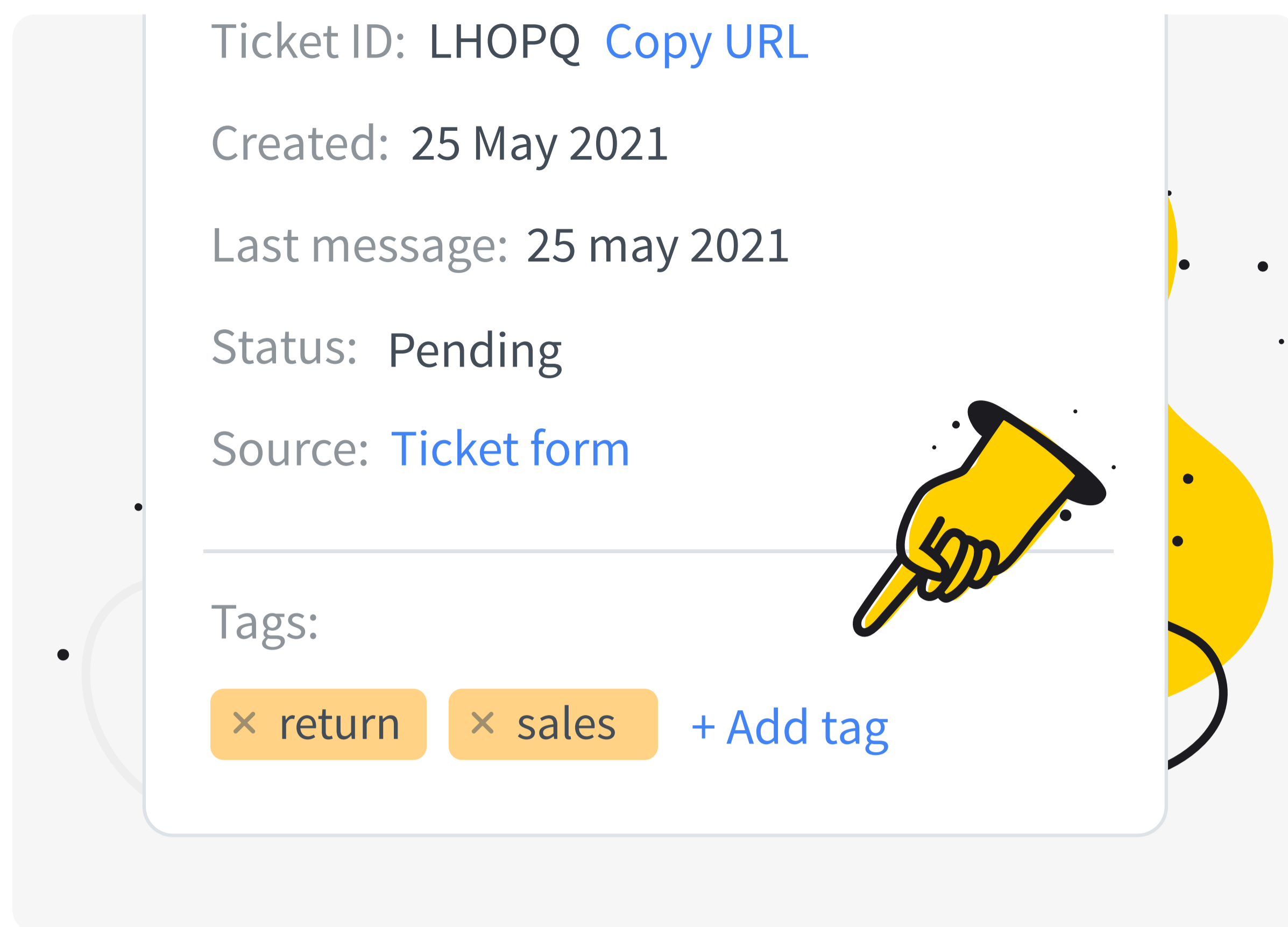
Create canned responses on the go from chats whenever you notice that you use a phrase regularly and for those phrases you know you'll use.



Make them your own

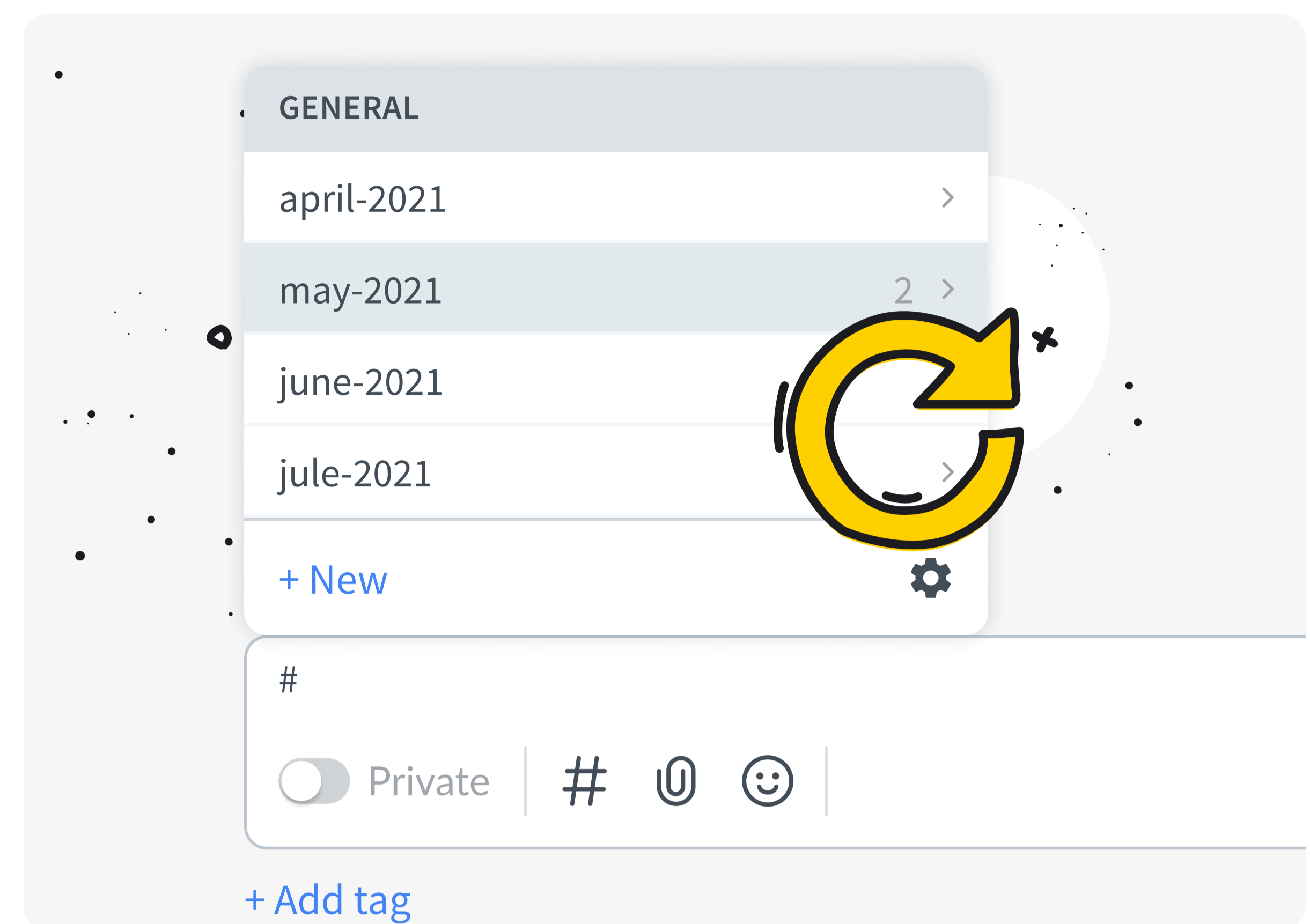
When you create canned responses just for yourself rather than the whole team, use your initial at the beginning of the shortcut to pull up your personal canned responses quickly.

Advice from the LiveChat Sales Team:



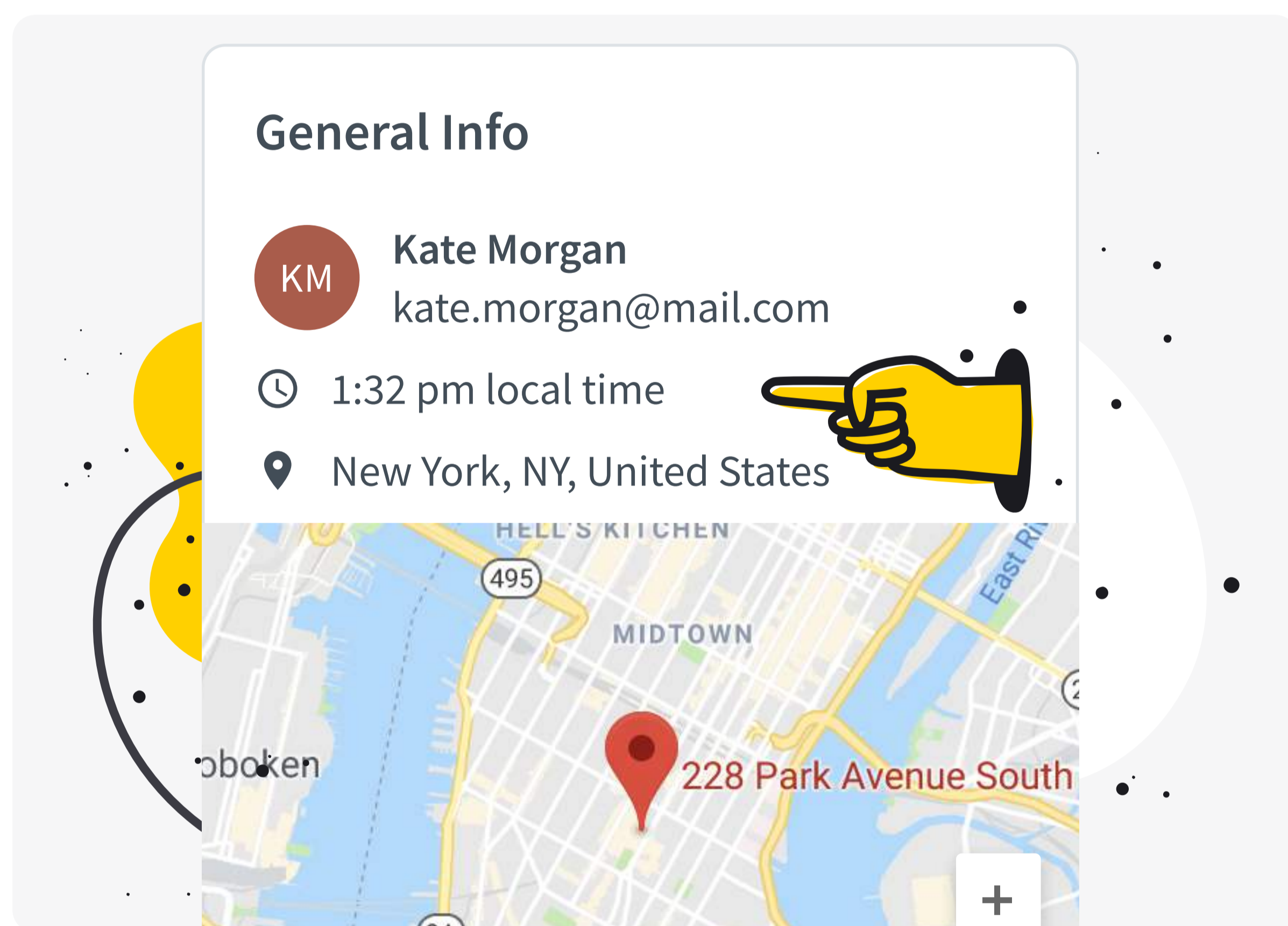
Tag your chats

Use tags to segment types of sales conversations. Be sure your whole team is on the same page as to how to use these.



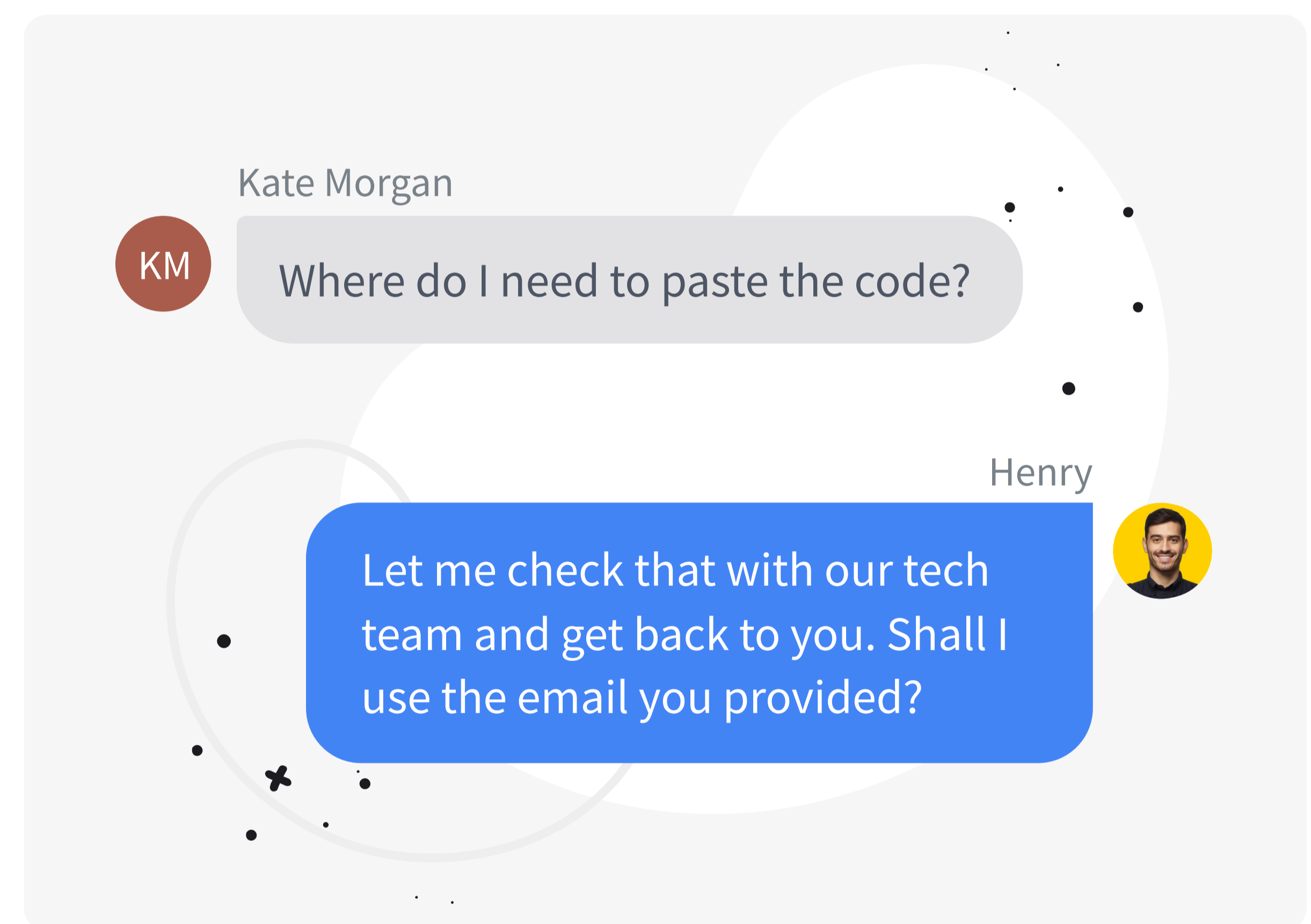
Be up to date

If using pricing in your canned responses, make sure this is updated when your pricing is.



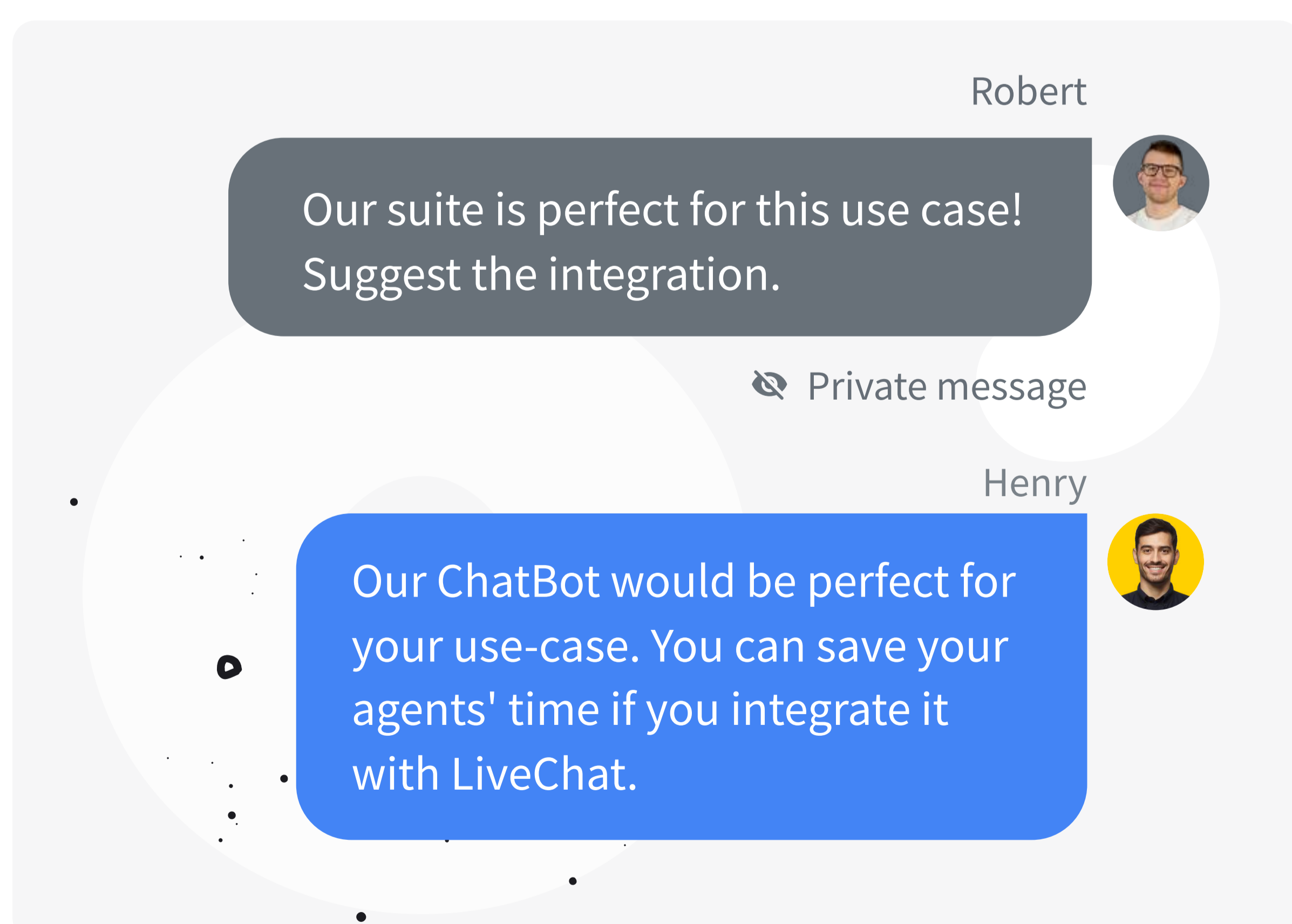
Check the time

If you're working with customers globally, refer to their location to confirm their timezone.



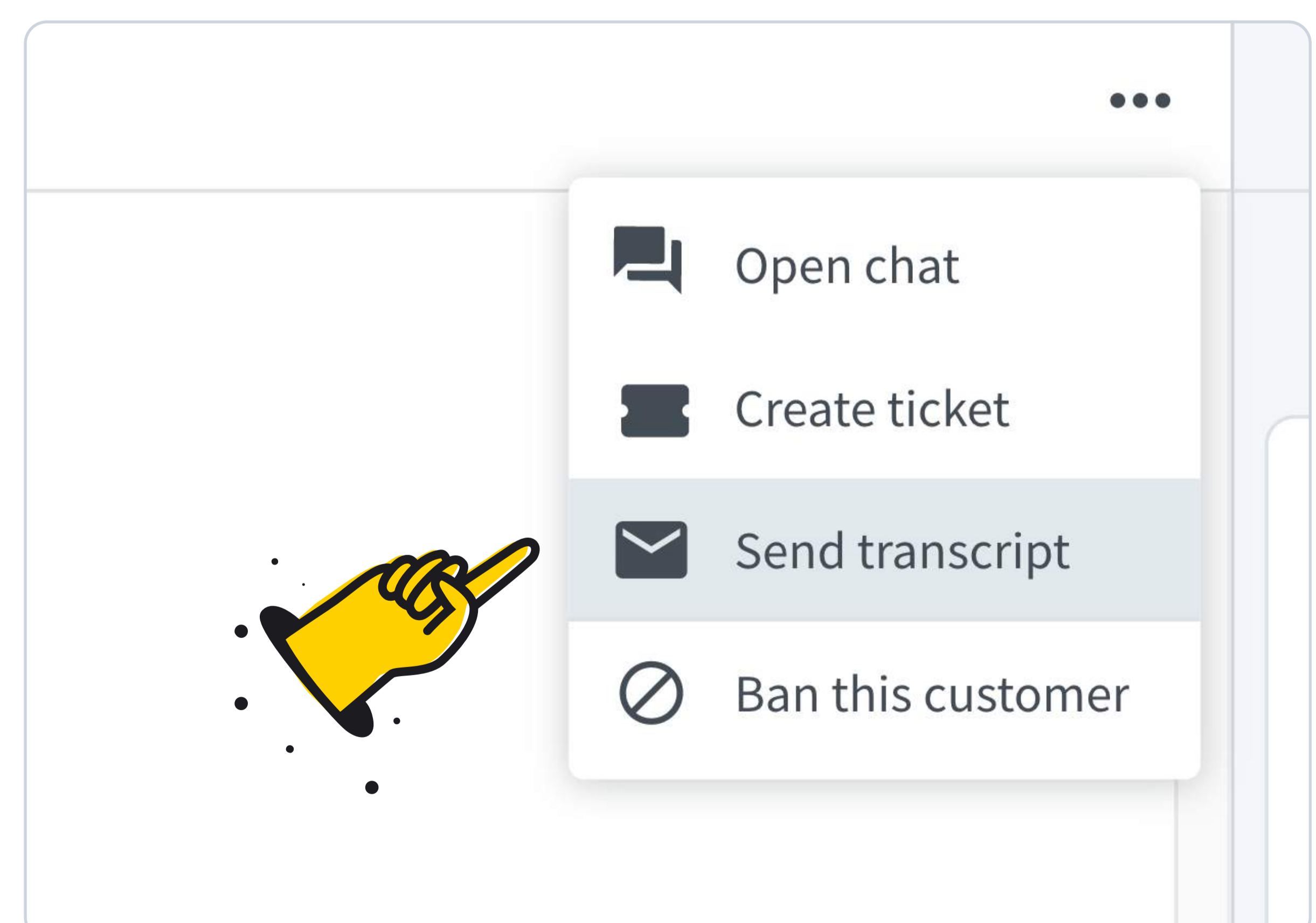
Confirm contact info

If you have any technical questions, it's a great opportunity to collect or confirm contact details. Don't be afraid to transfer to the tech team or get back to the customer via email after you have consulted them yourself.



Ask for help

You can always ask a manager to supervise your chat so they can send you private notes if you're unsure what to do in a particular case.



Send transcript

Use the [Send transcript](#) feature to save the chat in your CRM using [integrations](#), or write the chat ID under the customer profile.

Want to level up your agents' skills ASAP?

Holler at our sales team to find out everything you need about our training packages.

[Book a call](#)

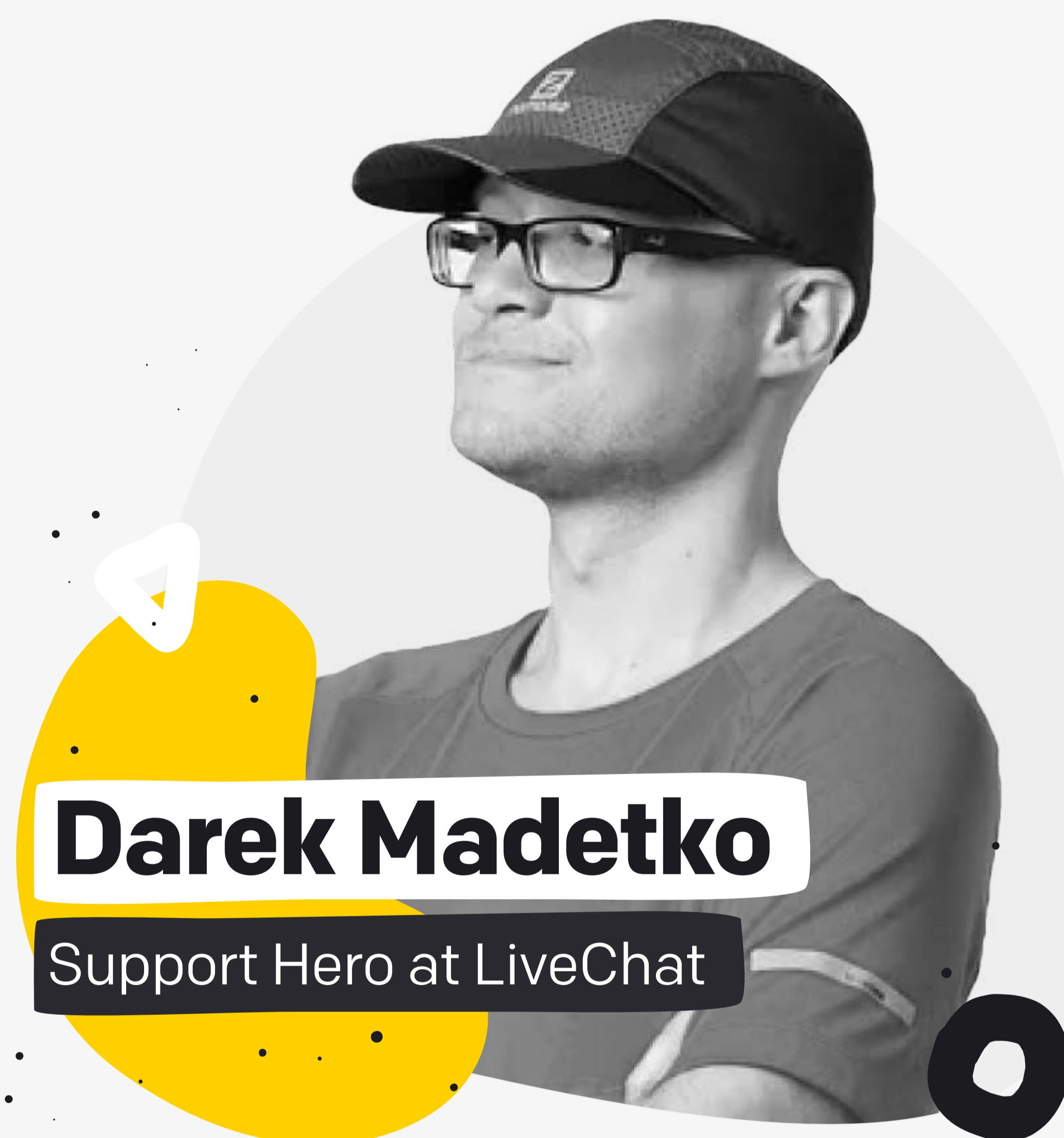


View it live in our webinars`

Customer's first step

Watch our webinar to see how the customer-facing side is set up!

[Watch webinar](#)



Darek Madetko

Support Hero at LiveChat



Dig into our resources



HelpCenter

Check out our Help Center for everything LiveChat.

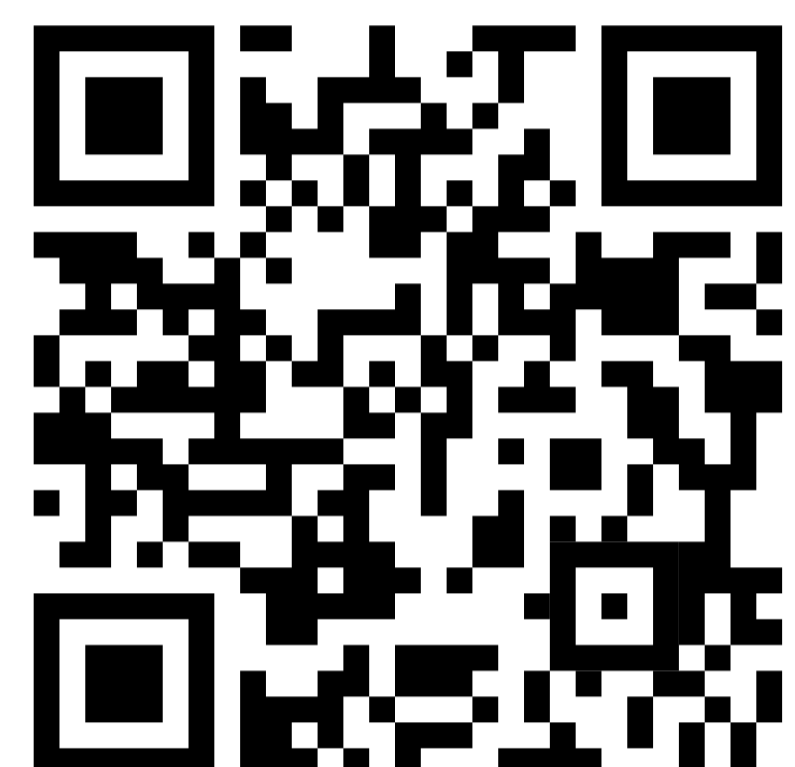
[Go to HelpCenter >](#)



Marketplace

Visit our Marketplace to find integrations with your favourite tools.

[Go to marketplace >](#)



Success

Subscribe to Success by LiveChat for insights and tips for customer communication

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