# Installing and Setting up the Beesender package

# Content

Introduction ..... 3
Operator features. ..... 4
Chat card. ..... 17
Chats section ..... 20



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# Introduction

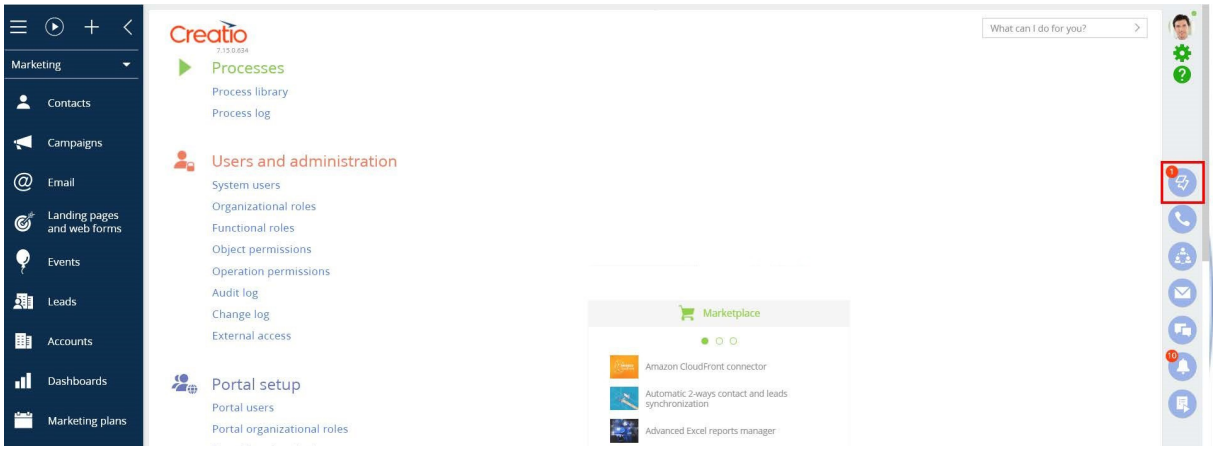
Beesender is an add-on to Creatio that helps you unite all communication channels in one system. You can interact with employees, partners and clients through social networks, messengers, widgets on your sites, e-mail, IP-telephony, SMS and Viber sending with Beesender.

Beesender Operator is adding a possibility to chat with clients and employees from Creatio's communicational panel (with chat history). Operators can send quick answers (templates), Knowledge Base articles, start business processes directly from the operator’s working window or transfer chats to another operators, groups and chatbots.

Beesender Operator is created for companies with contact centers and support services. This product's purpose is to accelerate employees' work by creating a multifunctional workplace. Such companies make operators' work easier, because all communication comes from one place – operator's working window. Clients may choose any communication channel, whether it's messenger, widget or social network.

# Operator features

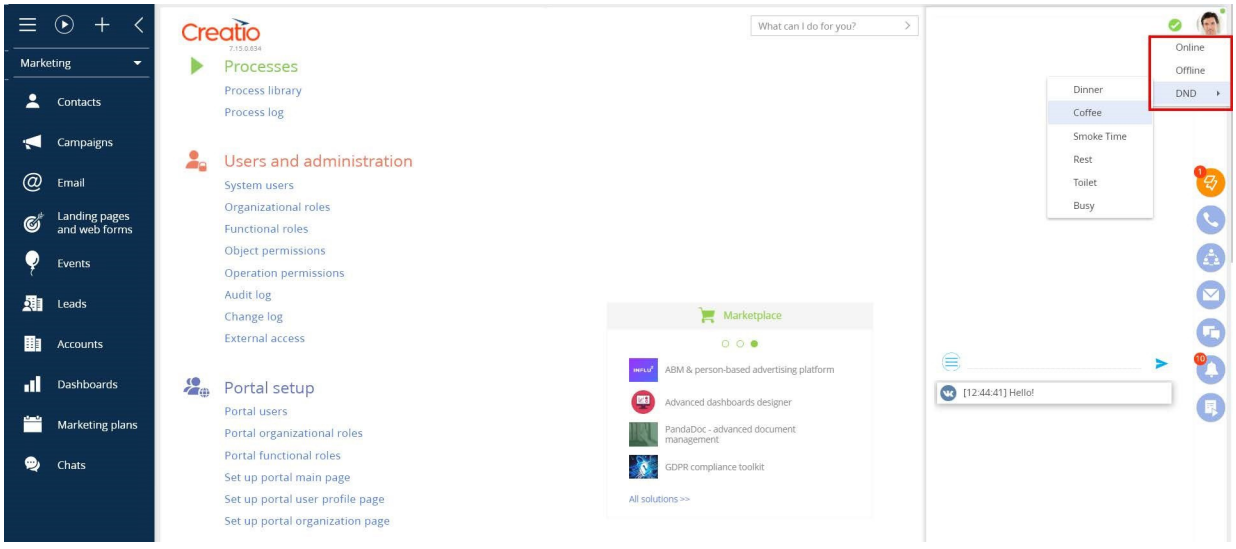
Once you set up Beesender, a new element appears in communication panel of the operator. Click it to open operator's working window.




Select status "Online" so the operator can receive incoming chats.

| | |
|---|---|
| Offline | It is selected at the end of the working day. In this case, new chats will no longer be assigned to this operator. |
| Do not disturb | This status allows you to select one of the categories due to which the operator may be busy. They are necessary in order to further be able to create adequate analytics on the work of the operator. At this time, new chats are also not coming. |

Operator should redistribute those chats that are currently open before leaving the



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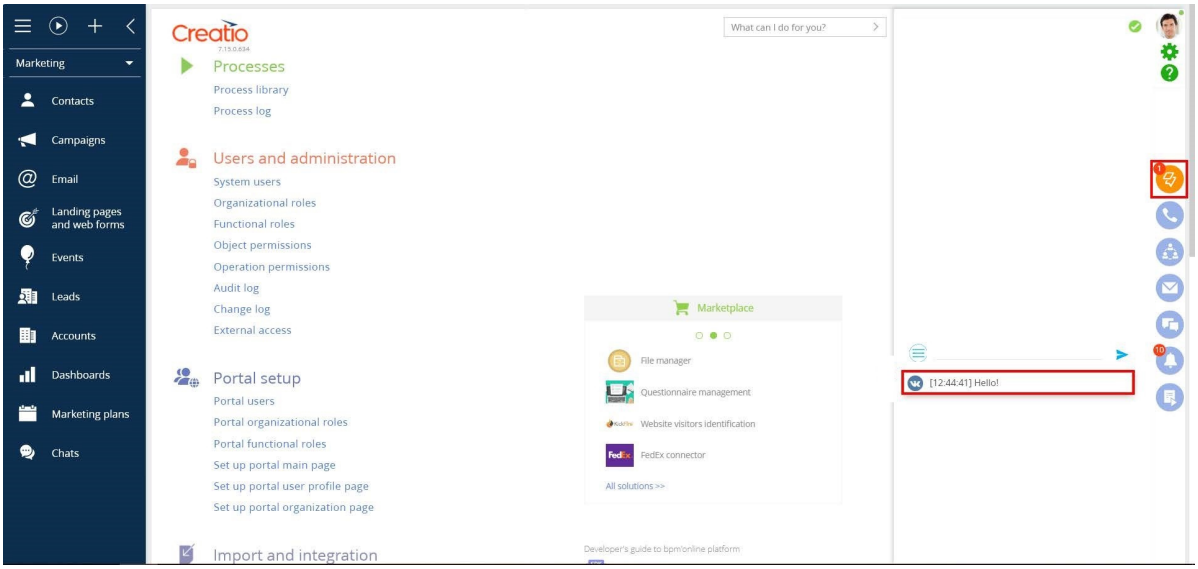
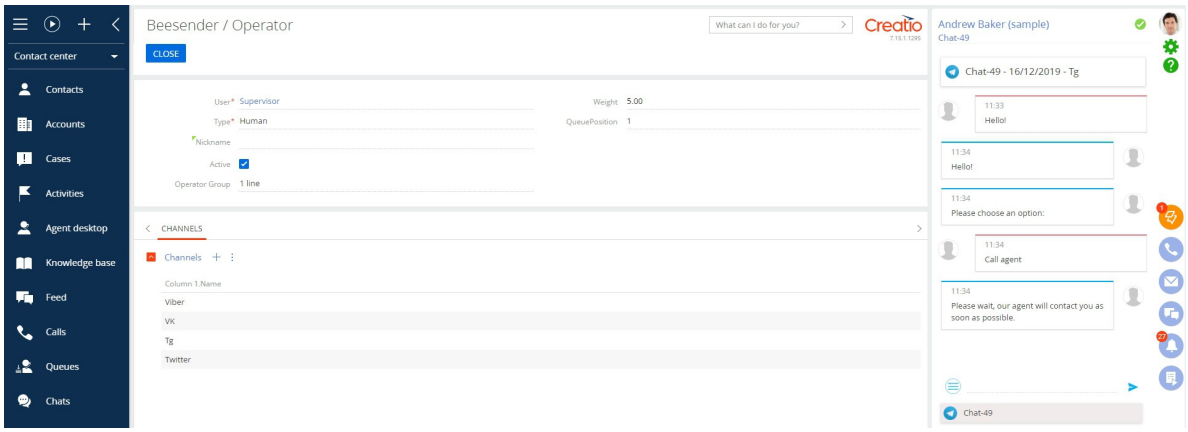
After that, the operator may receive new messages. New message notifications come in 4 different types:

- Push notifications. If the operator is authorized in the system, but is not located on this tab in the browser, he will still receive a notifications about the new messages (if it allowed in browser settings).
- The number of open chats in the operator window item on the communication panel.(1)
- Animation highlighting of new messages in the operator window.(2)
- Sound notification of a new message.




When you click on the dialog, the operator will see the entire message history with the client
(if the client has previously communicated with the chatbot, for example) or just messages to the operator. You cant also find in this window the name and photo of the client from the messenger, if the client writes for the first time. (If a person writes with the widget on the site,
these fields will be empty, but in this case, the operator has other options, which will be discussed below).
If the client does not write for the first time, then most likely he was already added to the contact card in the system, so instead of the nickname
from the messenger, there will be a full name from the contact card.


Beesender / Operator
What can I do for you?
Creatio
CLOSE
Contact center
Contacts
Accounts
Cases
Activities
Agent desktop
Knowledge base
Feed
Calls
Queues
Chats
User* Supervisor
Type* Human
Nickname
Active
Operator Group 1 line
Weight 5.00
QueuePosition 1
CHANNELS
Channels
Column 1.Name
Viber
VK
Tg
Twitter
Andrew Baker (sample)
Chat-49
Chat-49 - 16/12/2019 - Tg
11:33
Hello!
11:34
Hello!
11:34
Please choose an option:
11:34
Call agent
11:34
Please wait, our agent will contact you as soon as possible.
Chat-49



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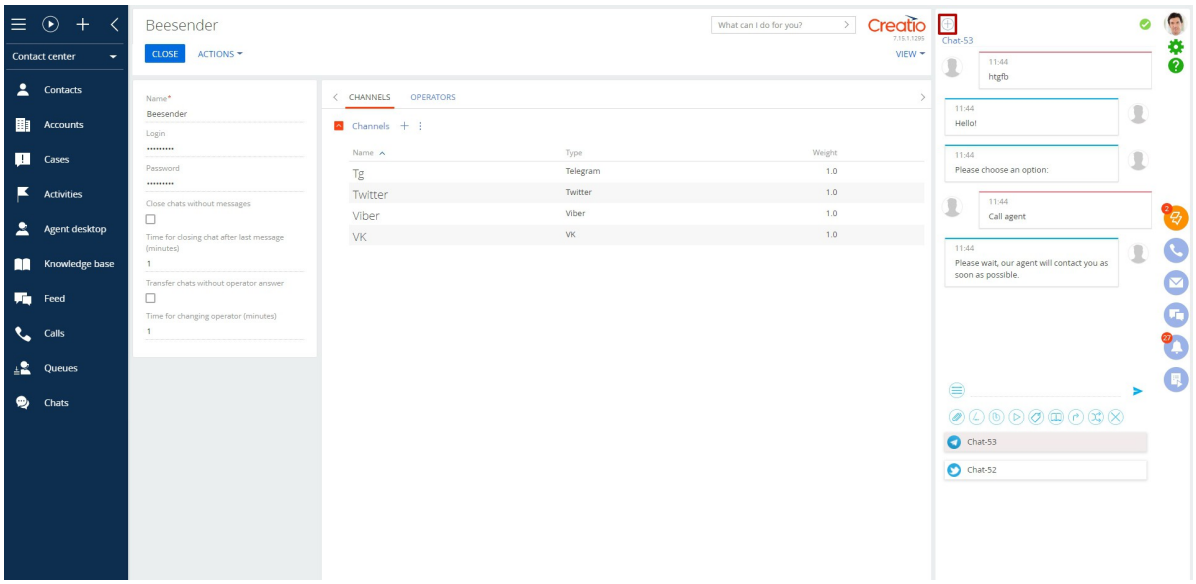
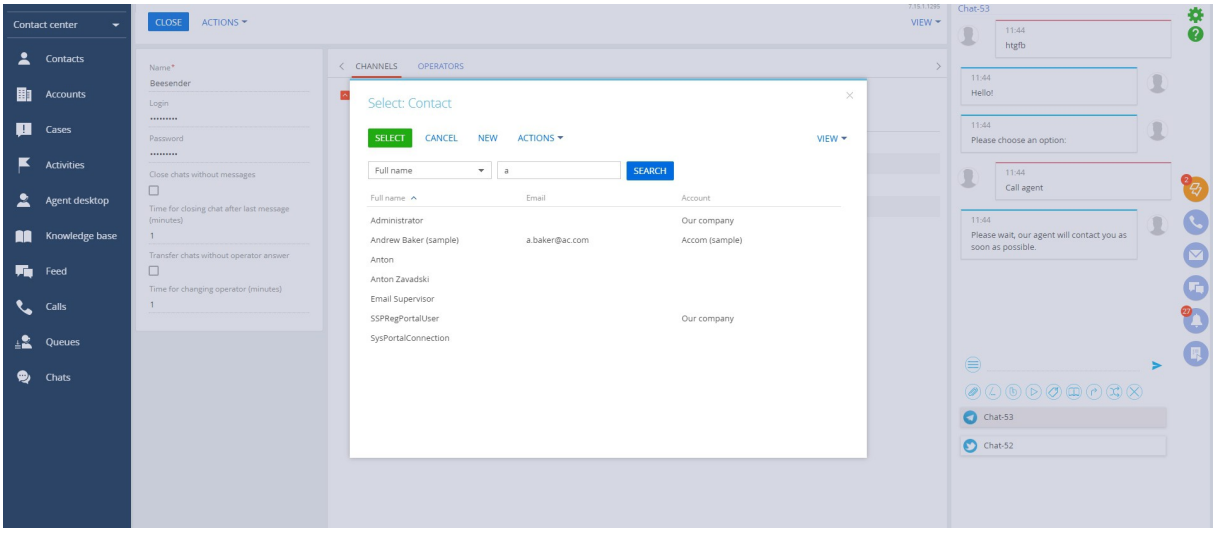
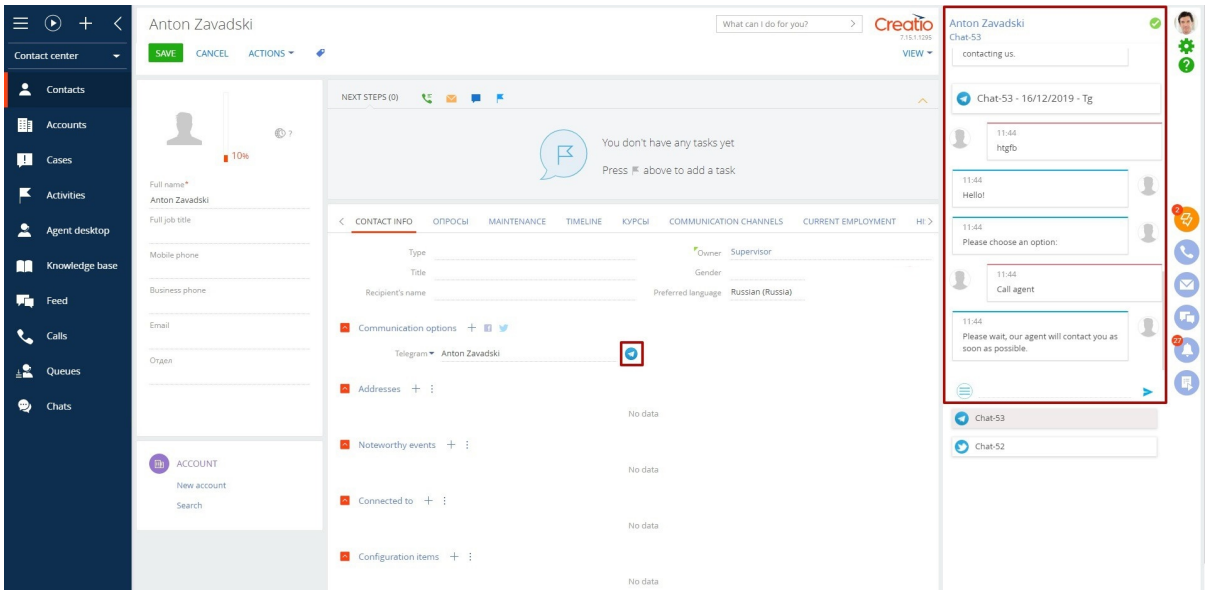



Threre is a "+" button next to the client's name. Click to open the contacts list.
If the necessary contact is not in the system, then it can be created from the same page. After that, the name of the contact in the dialog box will be changed to the name of the contact card with a hyperlink to this contact. (After refreshing the page).




After that, a new entry will appear in the contact card in the "Communications" object.

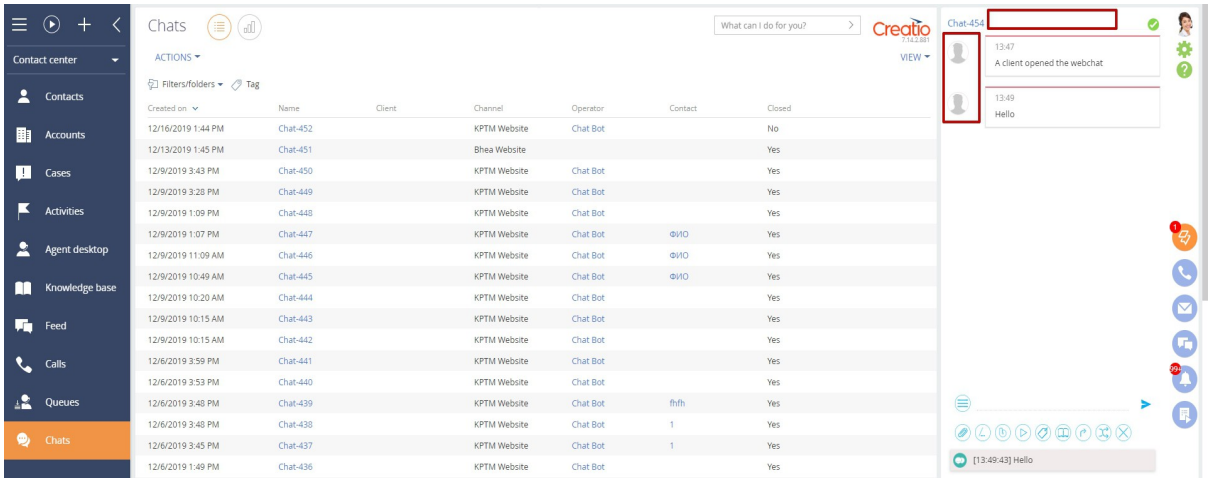
Clicking on the icon of which you can start a dialogue with this contact (if there is no open chat with this contact at the moment).




In case when a person writes from the widget on the site, information about the client is provided in the operator's window in a slightly different form.
The person writes in the widget on the site.

In case when the chatbot is connected, he is the first to welcome the client.

The operator sees a message about the new chat from the site in his window.
The difference between the chat and instant messengers is that the chat does not contain a nickname and customer photo.



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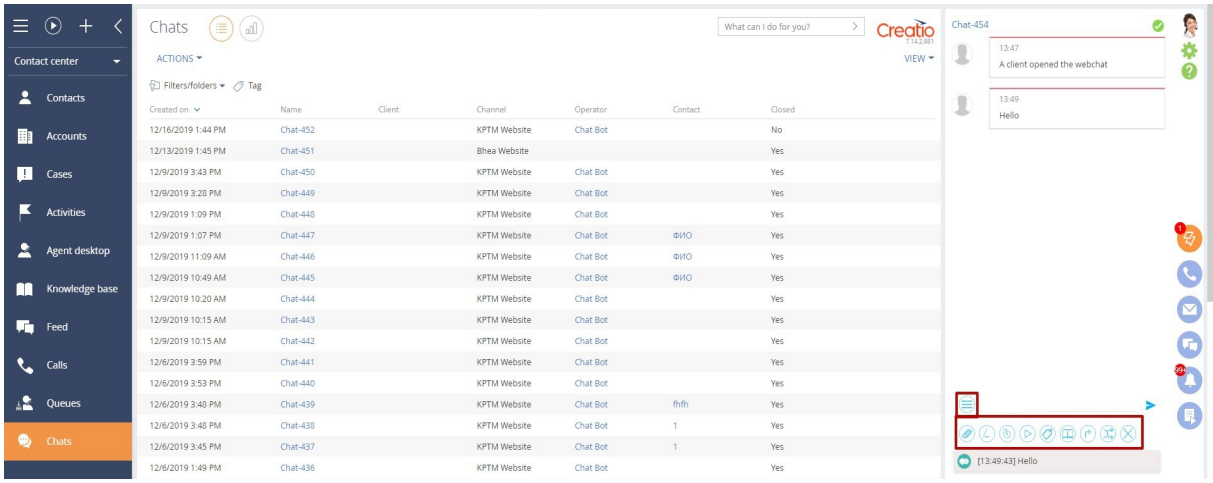
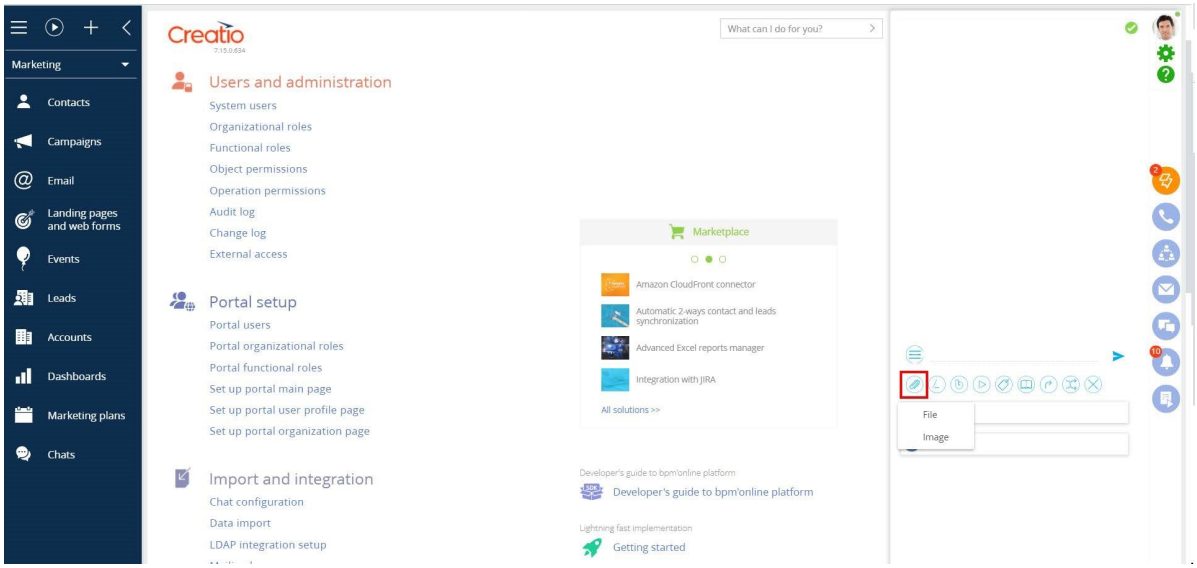
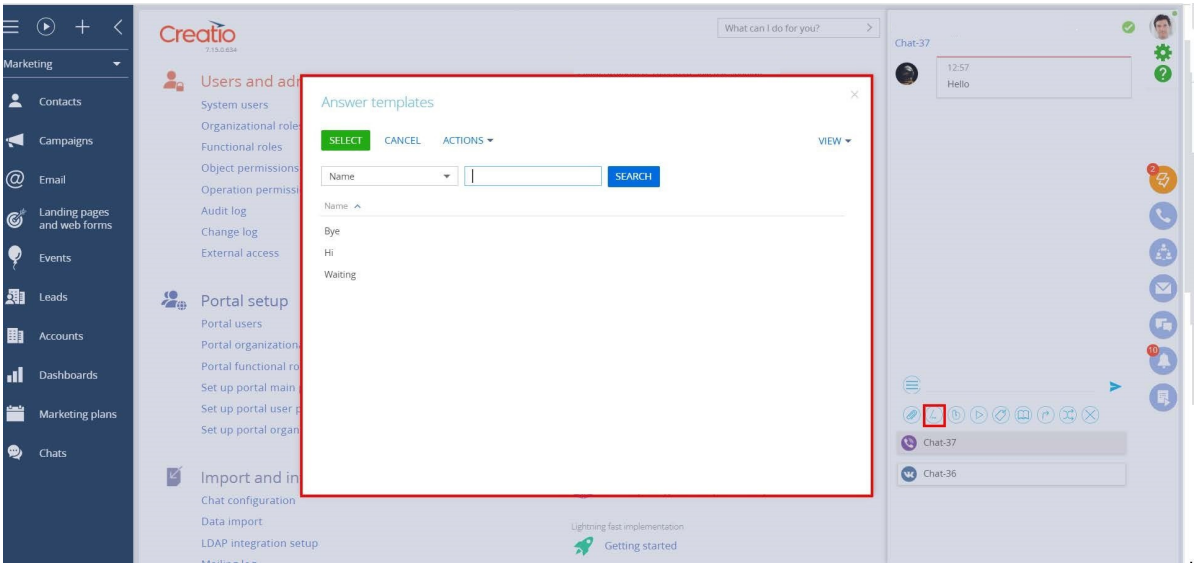
Also, when you press the options button, the operator’s work menu appears.



**1.** Send file (Ctrl + Shift + 4) is the ability to attach the required file or image to the client from the computer (must not exceed 10 MB). The file will be sent to the client as a download link. The image will be opened in chat window automatically.




**2.** Quick answers (Hotkeys: Ctrl + Shift + 1) is a list of answers to facilitate the work of the operator (answers to routine frequently asked questions or frequently used phrases).




**3.** Operator chatbot (Transfer to chatbot operator (Ctrl + Shift + 7)). When you press this button, the client will receive a welcome message from the selected chatbot from the list. At this moment chat is finished for the operator.



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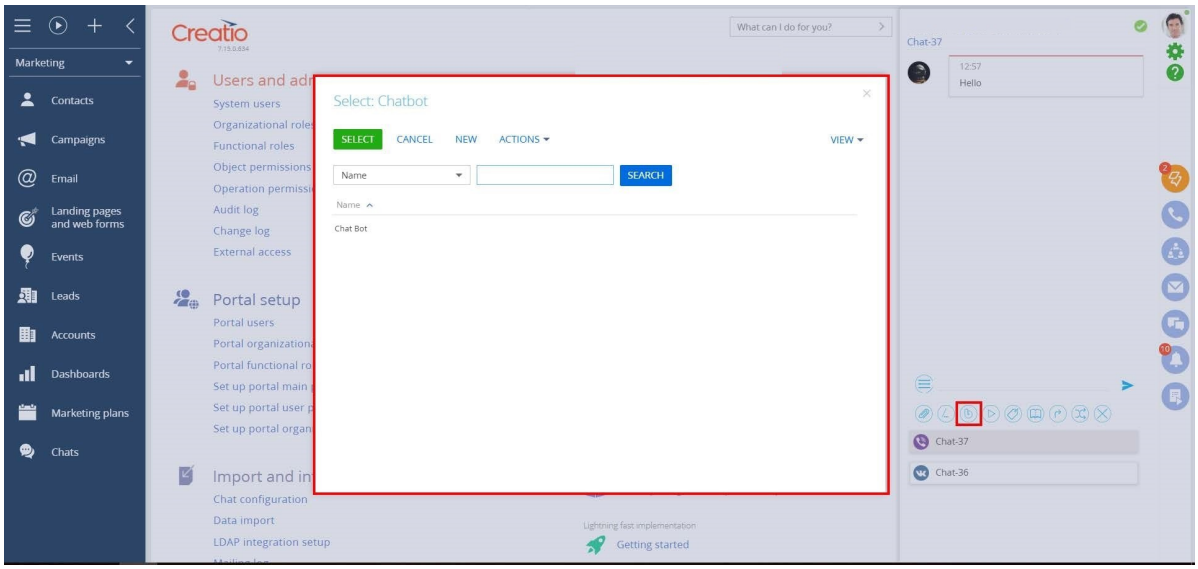
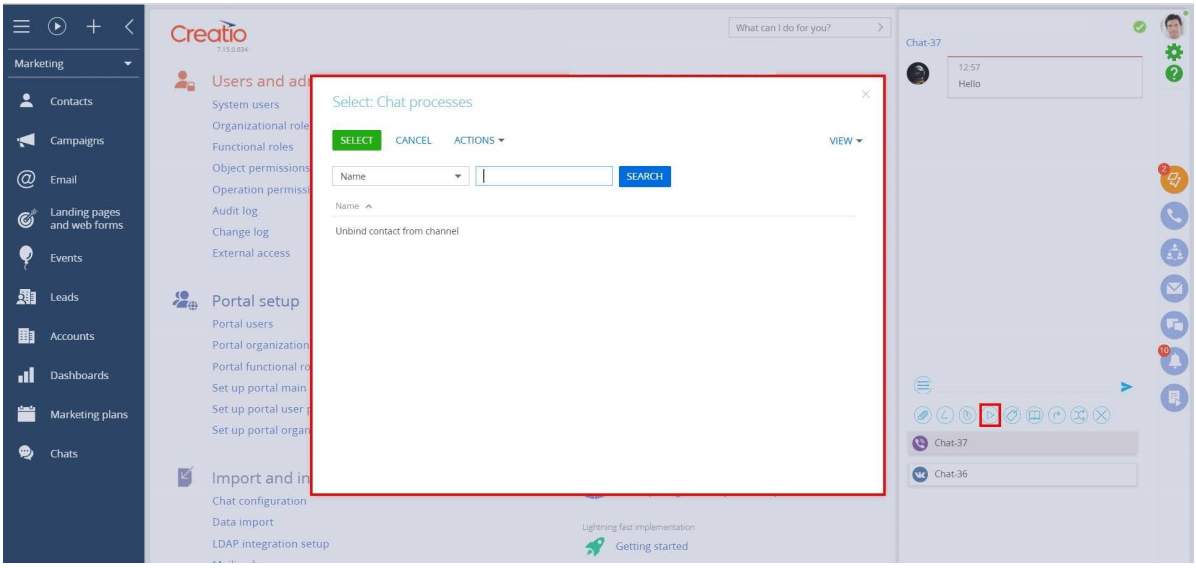



**4.** Chat process (Ctrl + Shift + 3) is the ability to start business processes directly from the operator's working window (for example, creating a lead / activity / conversion).



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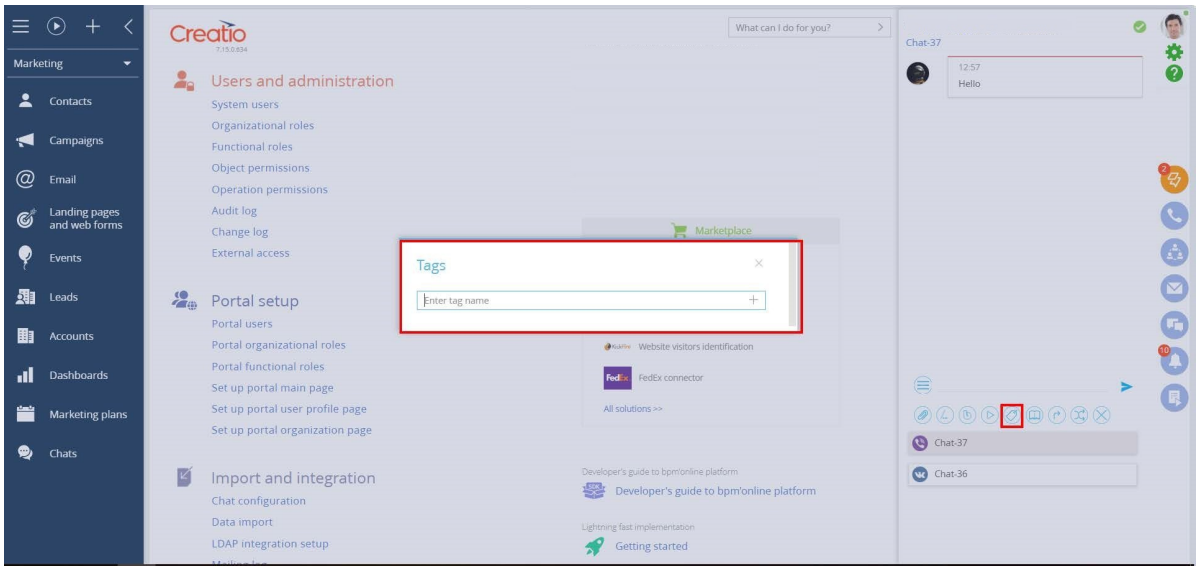
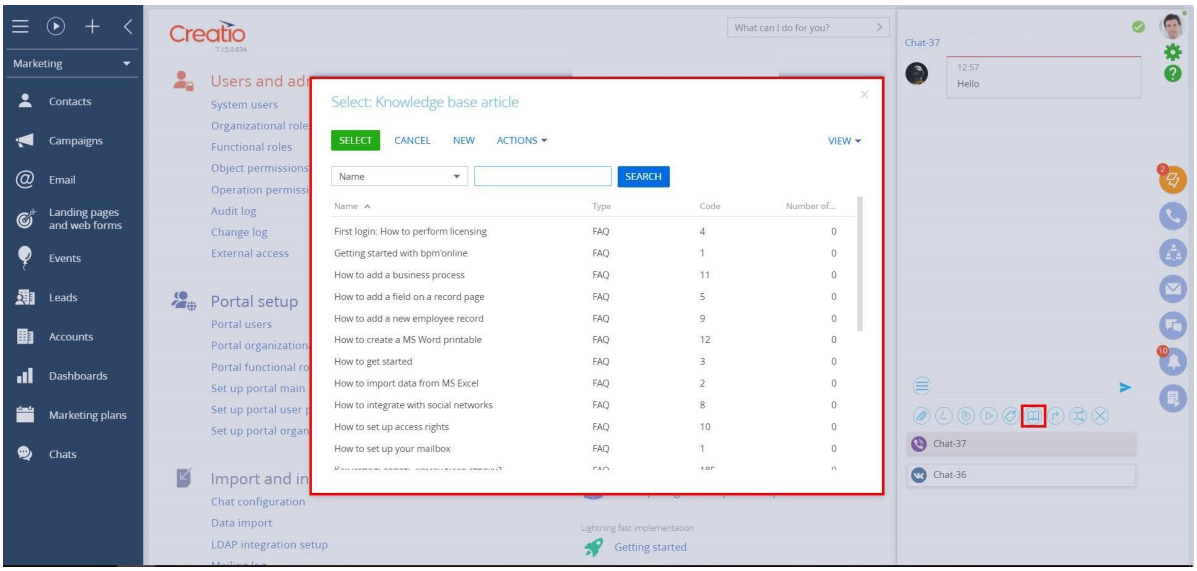
**5.** Tags (Ctrl + Shift + 2) is a keyword to identify dialogues category. You can assign multiple tags for a single conversation to make it easier to search by chat and simplify the classification of conversations in the future.




**6.** Knowledge Base article (Ctrl + Shift + 5). The operator can send a knowledge base article to the client, if necessary. Usually the article is divided into several messages in the chat (fragments of 200 characters, the size of the article should not exceed 2000 characters).



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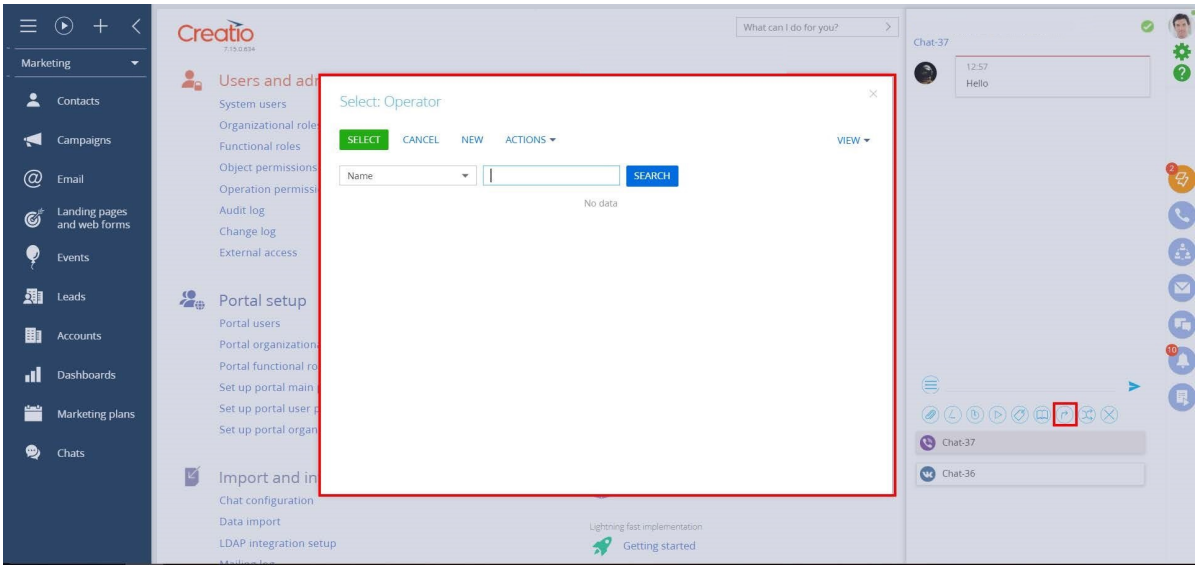
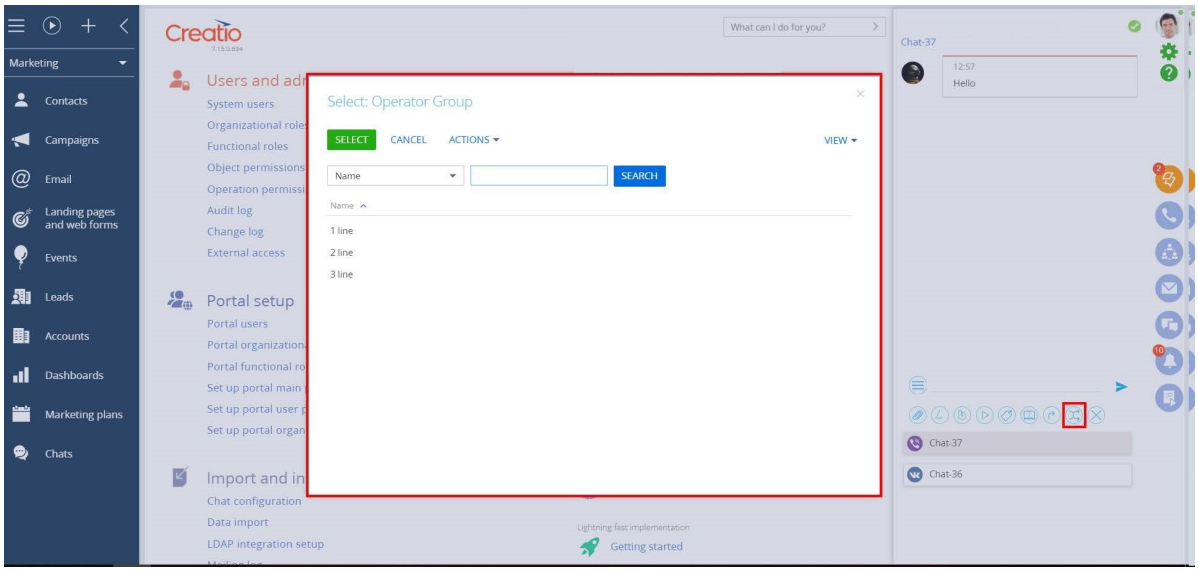
**7.** Transfer chat to another operator (Ctrl + Shift + 6). You can transfer chat to another operator. When you click on this button, a list of operators that are currently online and active appears. From this list, you need to select the desired operator, to which the chat will be redistributed (even despite the weight of the operator and the fact that the channel in which the chat is open may not be assigned to this operator).




**8.** Transfer to the group (Ctrl + Shift + 8). This button is used when an operator finds it necessary to transfer chat to the group of operators whose competence will provide the client with the necessary advice (if there are several operators in this group, the chat will be transferred for least busy operator in the group).



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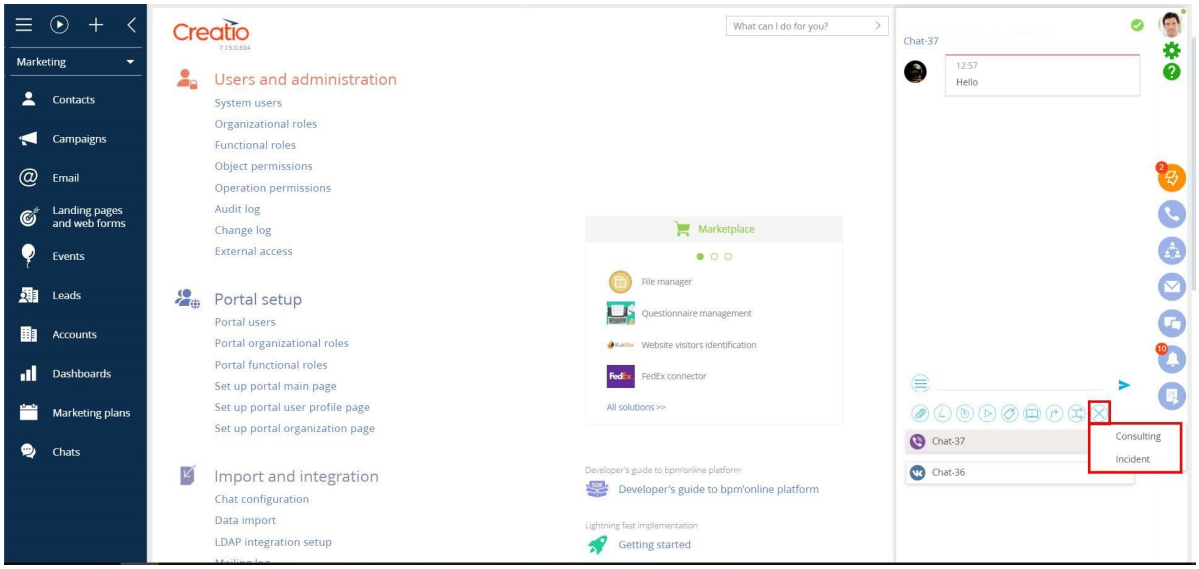
**9.** Close chat (Ctrl + Shift + 9). In case when dialogue has reached its logical conclusion and the operator does not need to transfer the chat to the bot, the operator should click on this button. The list will appear where operator can select category, that describes chat ending. The standard values are “Consulting” and “Incident”, but you can change them or add new ones in the directory. After selecting a category, the chat is finished.




**Important**

Hot keys work only when the cursor is in the operator input field.



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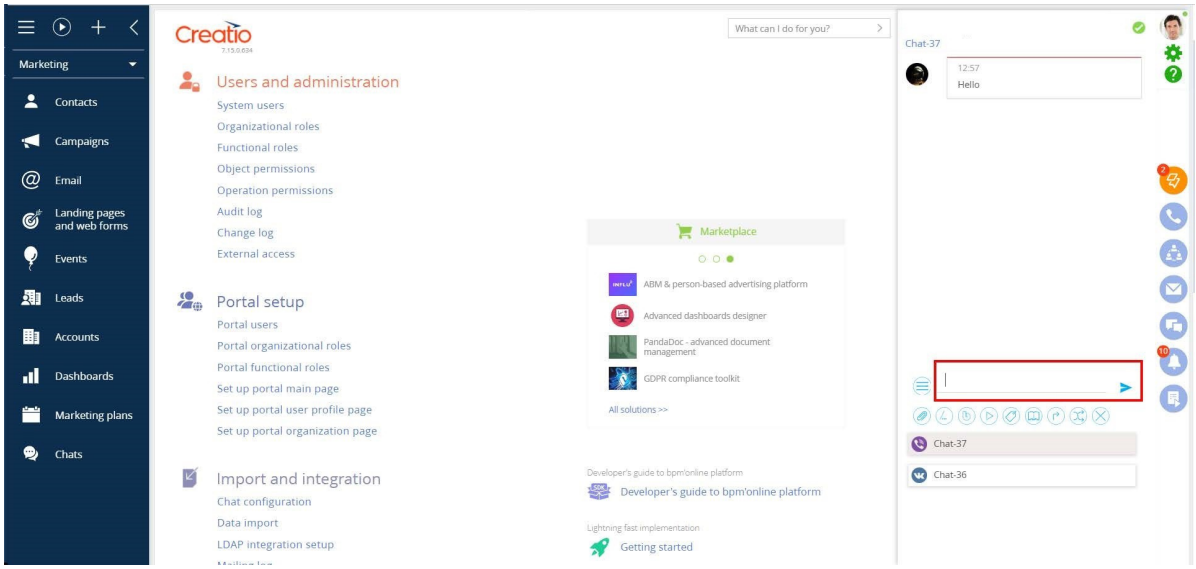


**Operator can see chat history with current user in communication panel**

You need to check the box "Default value" in the system setting "BeesenderIsAllChatHistory" to enable this function



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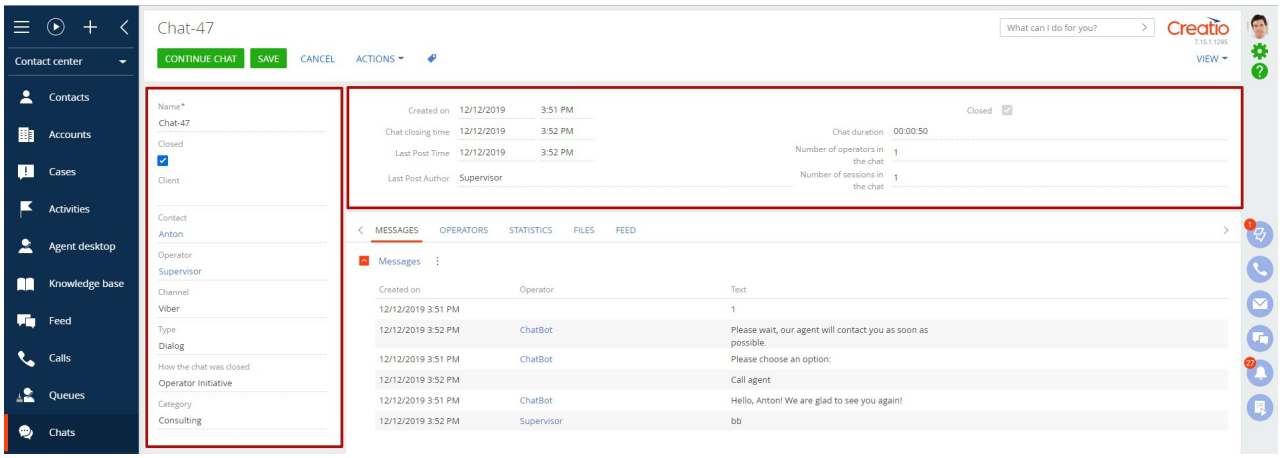
# Chat card

The chat card contains the following main fields:

| | |
|---|---|
| Name | Standard field, filled automatically by the serial number of the chat. |
| Closed | Checkbox, the empty value indicates that the chat is open at the moment (operator or chatbot). Chat can be closed manually by clicking on the checkbox, despite the fact that chats can also be closed automatically. |
| Client | Client nickname from the messenger (for the website widget, the field will be |
| Contact | Associated contact from the system. |
| Operator | The operator or chatbot who is involving in chatting process at the moment (if the chat is open) or occurred before its completion (if it is completed). |
| Channel | The way of communication (widget from the site or any of the instant messengers). |
| Type | Reflects the usefulness of the dialogue between the client and the operator. (The value of “Dialogue” is assigned to the chat, if the number of messages from the client is more than one, otherwise it is a “Visit”). Shipped automatically after the chat is finished. |
| Created on | Start date of this chat |
| Continue chat | This chat will be open in the operator’s window (it is reflected only if the chat is closed, and it can be continued only when the client has no other active chat). |



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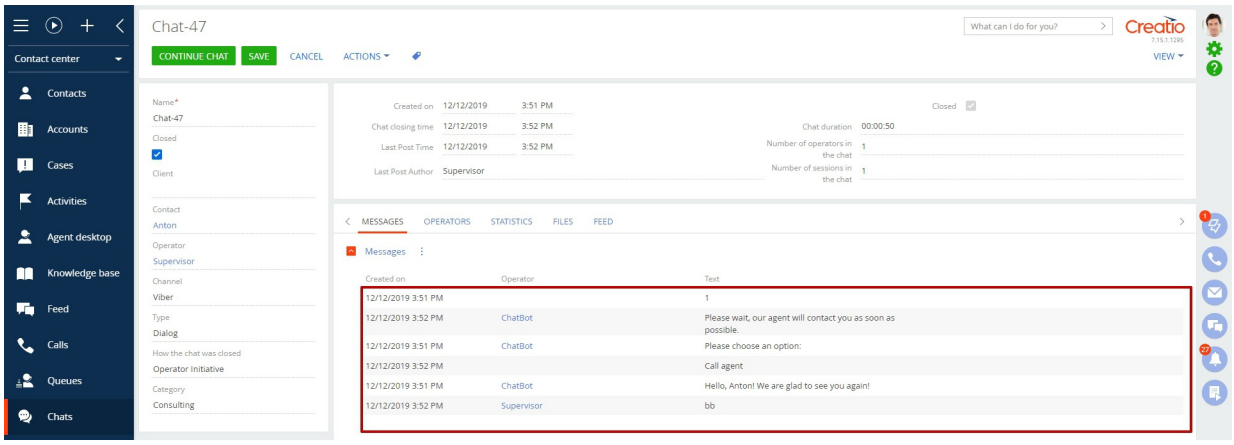
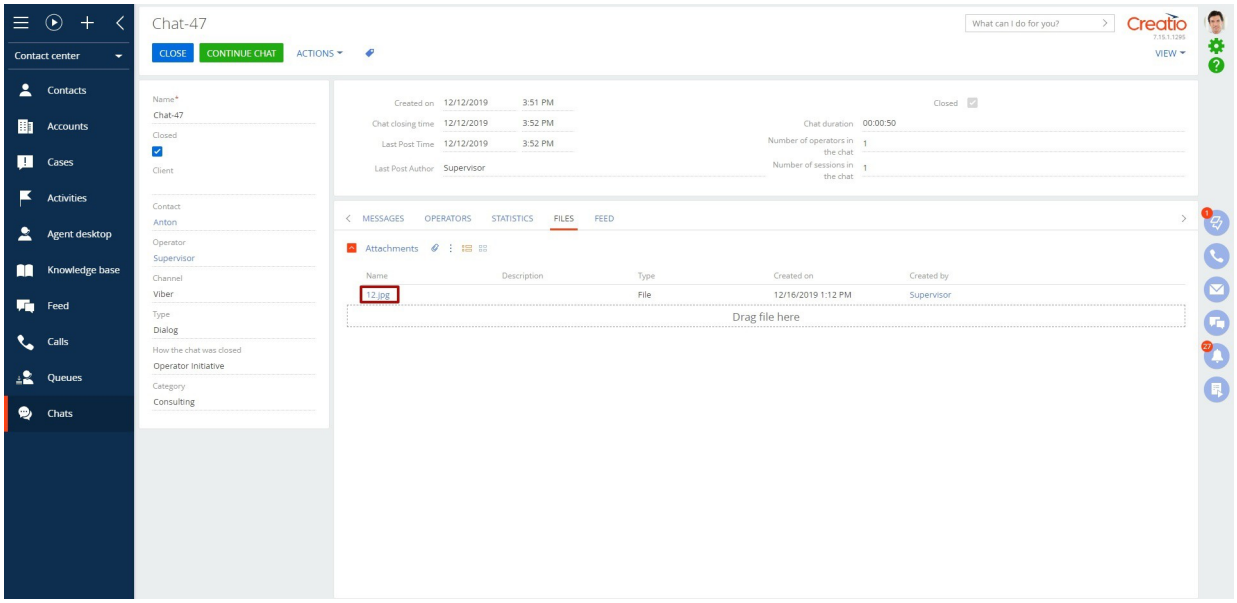
There is also the detail that reflects the entire history of the messages of this chat. Usually it contains the following columns:

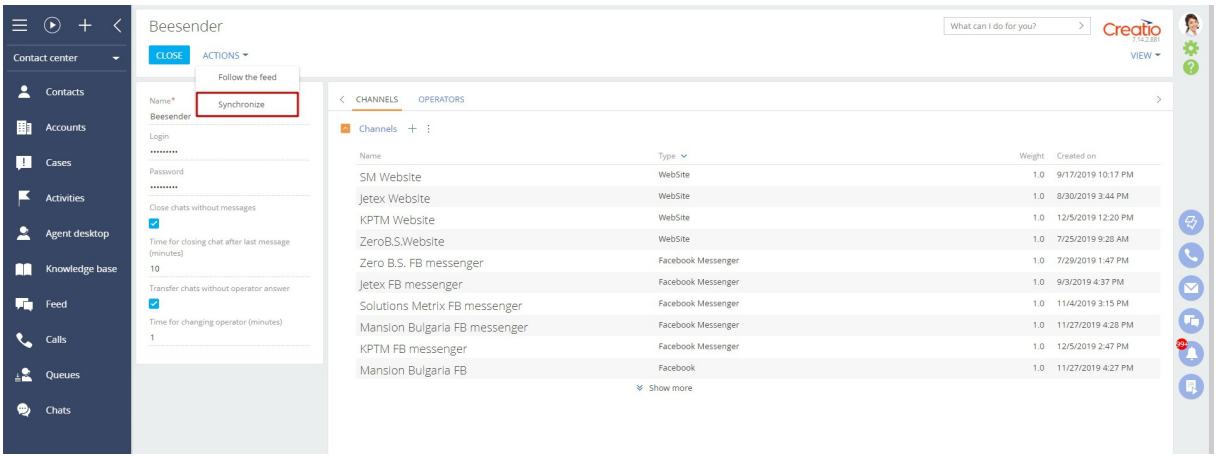
- "Created on" the date and time the massage has been created.
- "Message text".
- "Operator" shows which replica belongs to operator and which belongs to the client. The empty one means that replica belongs to the client.




In "Files" section you can see files that were received from the contact, as a link to download. Operator can click on their names to download them.



In the "Chat configuration" section if you press "Actions" button, you will see a button called
"Synchronize".

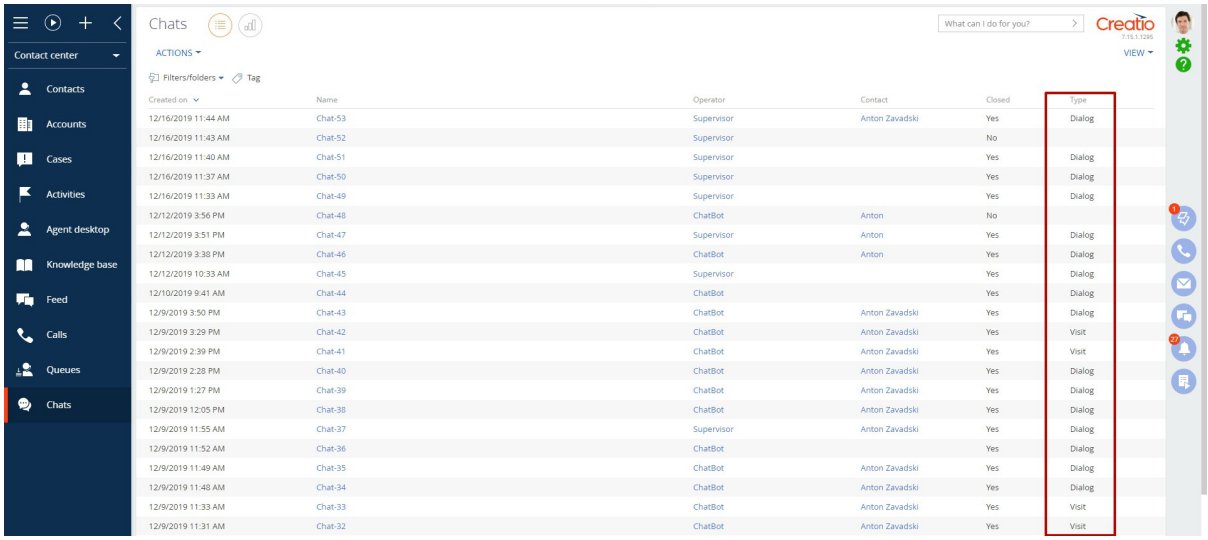



You should press it only in following situations:

1. When connector is changed
2. If your Beesender token is inserted in more then one Creatio system. Working capacity of
   licenses will be actualized on the system where this button is pressed.
3. When you change your Bessender token.
4. To check availability of Beesender connector.

# Chats section

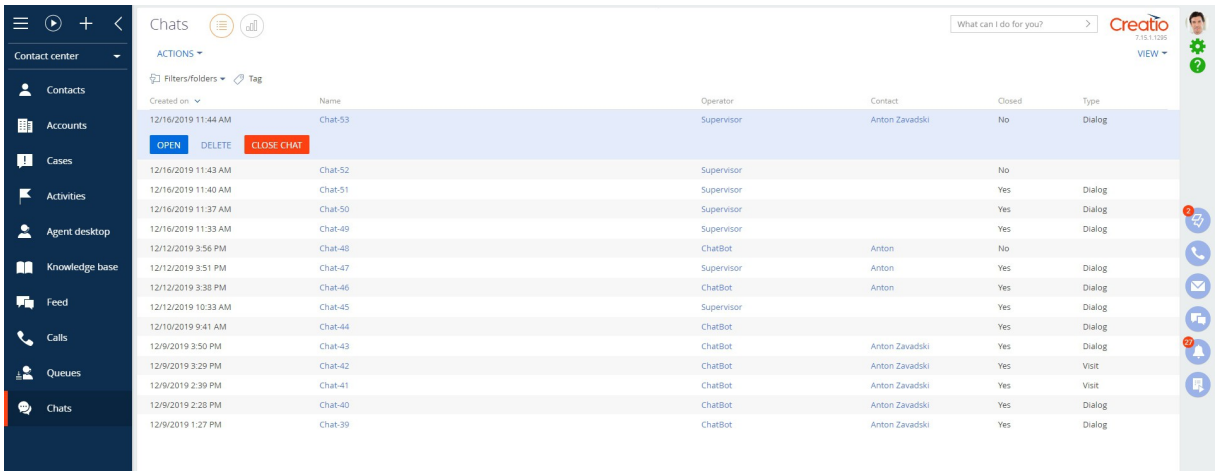
The registry reflects the standard columns that were described in the Chat Card.
Note that some fields may be empty.
For example, the field “Type” is automatically filled in only when the chat is finished. The “Channel User” field cannot be filled in if client uses widget on website.




There are standard Creatio features in this section: filter records, groups.

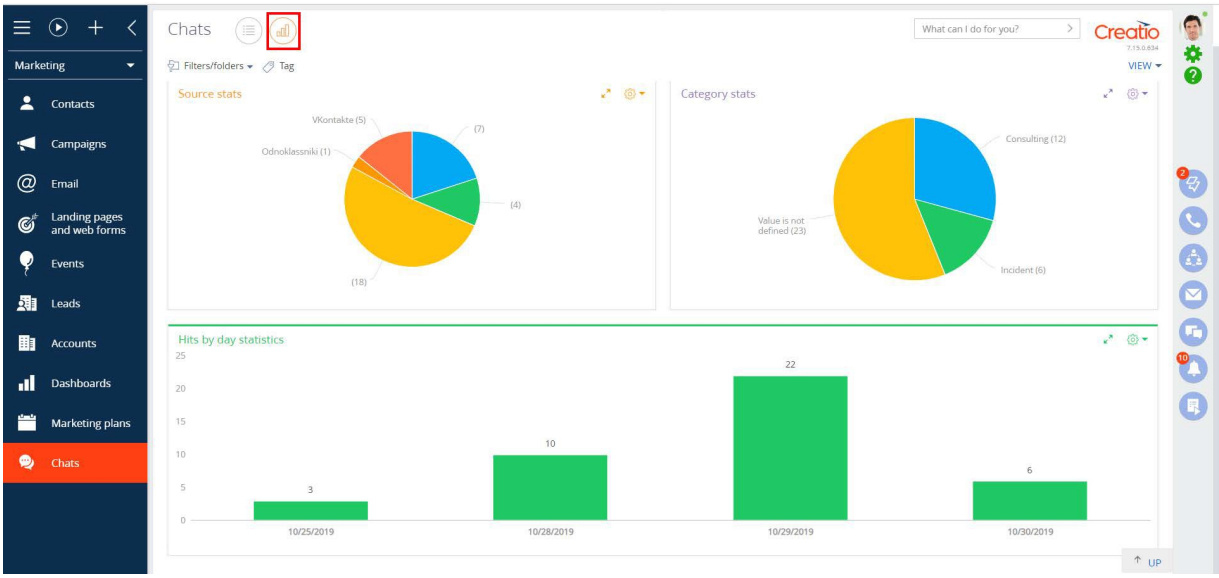
To go to the chat card you need to click on the name of the desired chat or on the "Open" button.

Also there are buttons "Copy", "Delete" and "Close chat", that delete, copy or close the chat, respectively




This section also includes the "Chat Analytics" tab. You can find analytics information there.

The Beesender package has a standard dashboard with analytics per chat.




However, you can add other various indicators or graphs.