

BSP Life FreshChat Agent Guide

1. Activate your account and login

Once your Account Owner/Admin adds you to a Freshchat account, you will get an activation email from team Freshchat. You need to activate your account and set up a password.

Open the email and click Activate Account. You will be taken to the Freshworks account activation page. Here you can fill in your details, set a password, and activate your account.

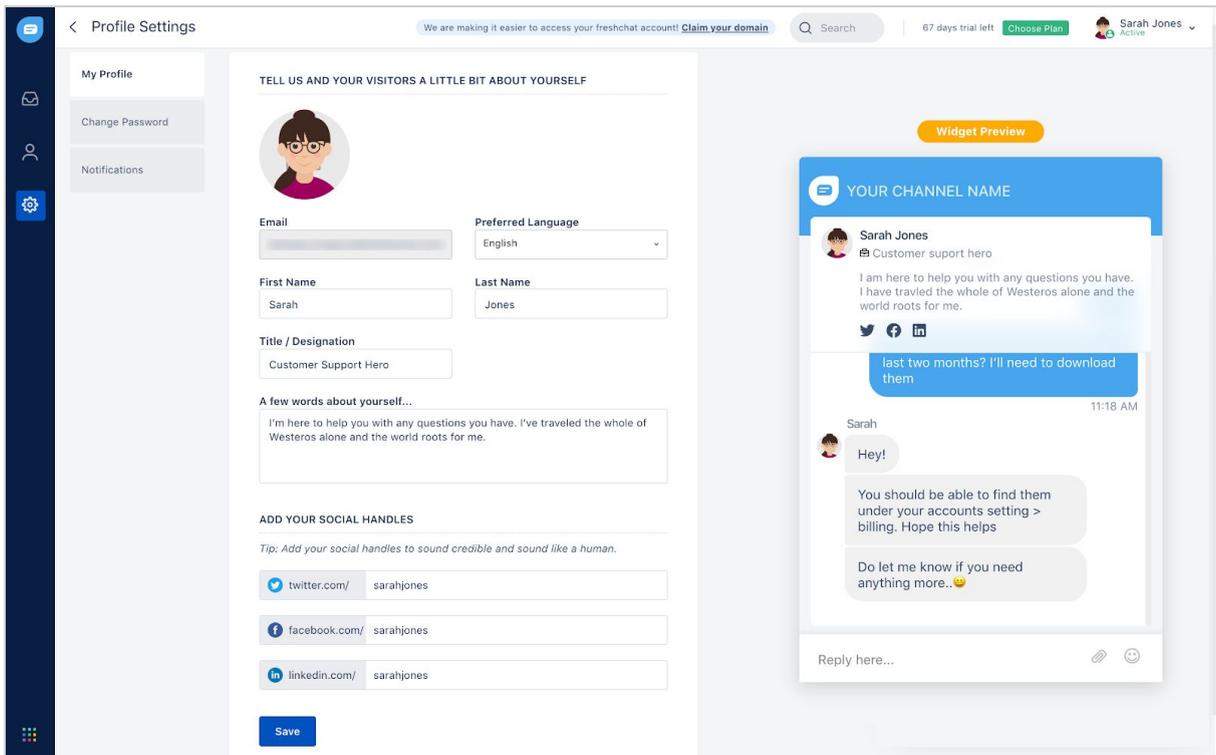
Login URL : <https://web.freshchat.com/login?redirect=login>

2. Setup your profile, preferred language, and notifications

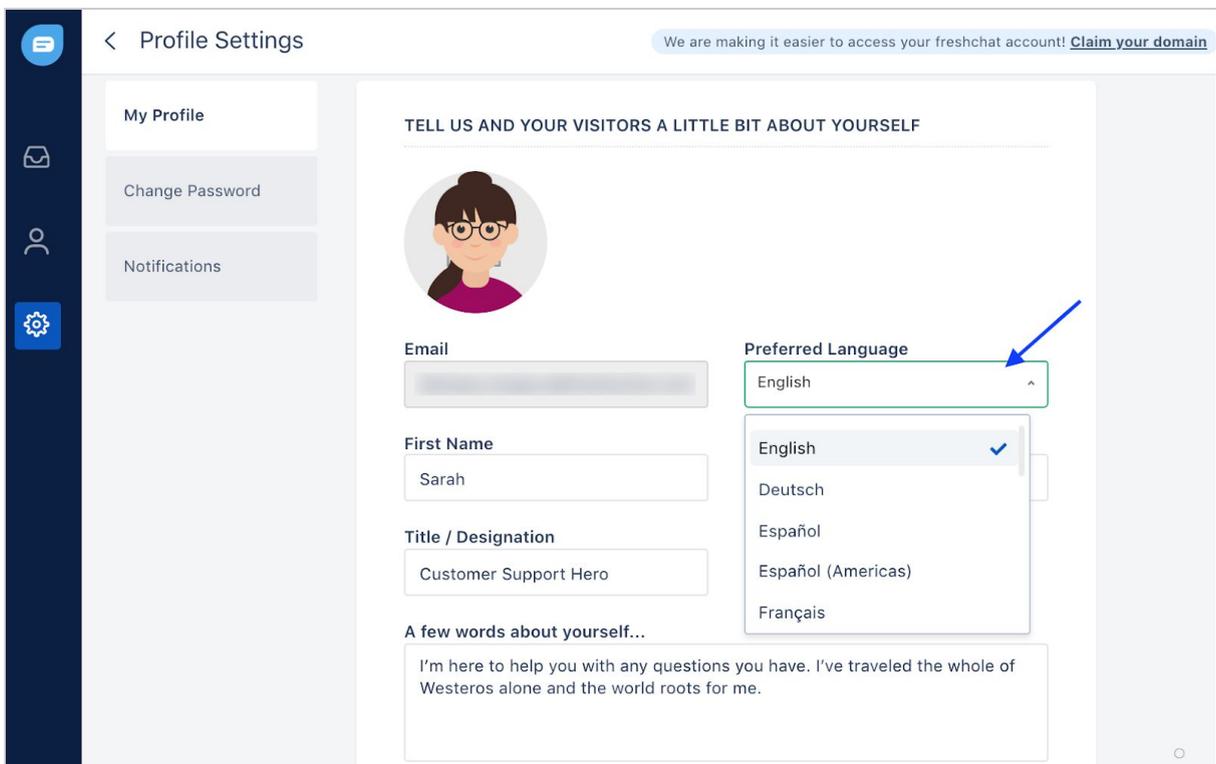
Each team member can personalize their Freshchat profile and control their notification preferences through their personal profile settings.

Go to Settings > Profile Settings.

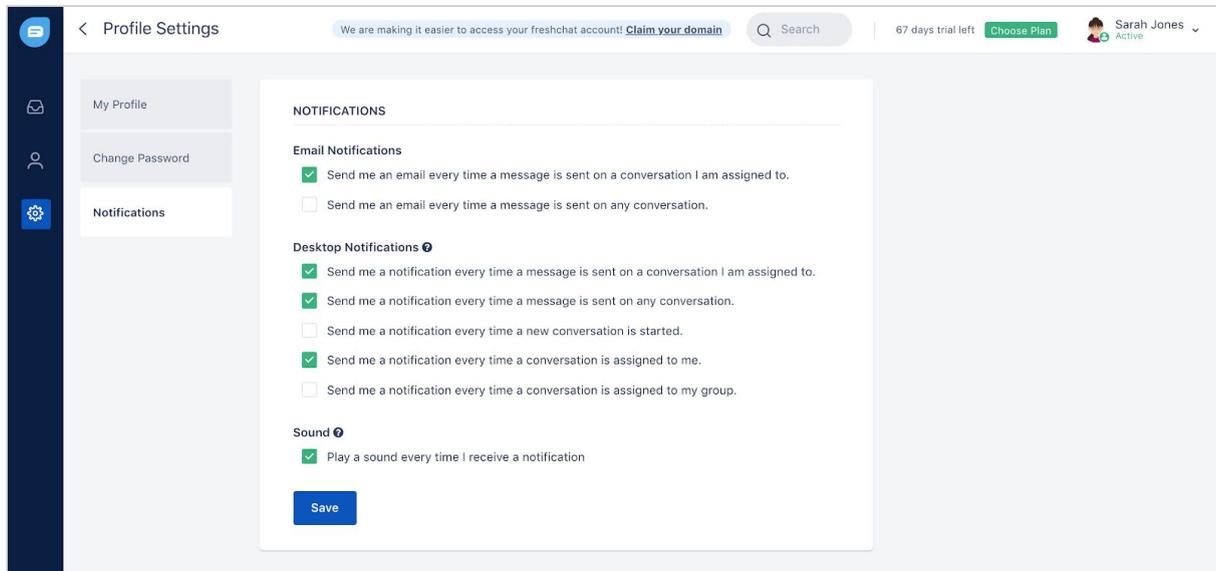
Here you can upload a profile picture, add a bio, and link your social media handles. Telling your prospects and customers a little bit about yourself will help build credibility and make a connection with them.



You can localize your Freshchat interface in one of the 20 different interface languages we currently support. This will auto-translate your Freshchat interface to the chosen language.



And under Notifications, you can configure your email, desktop and sound notification preferences.



The screenshot shows the 'Profile Settings' page for a user named Sarah Jones. The page is divided into a left sidebar with navigation options: 'My Profile', 'Change Password', and 'Notifications' (which is currently selected). The main content area is titled 'NOTIFICATIONS' and contains three sections of settings:

- Email Notifications:**
 - Send me an email every time a message is sent on a conversation I am assigned to.
 - Send me an email every time a message is sent on any conversation.
- Desktop Notifications:**
 - Send me a notification every time a message is sent on a conversation I am assigned to.
 - Send me a notification every time a message is sent on any conversation.
 - Send me a notification every time a new conversation is started.
 - Send me a notification every time a conversation is assigned to me.
 - Send me a notification every time a conversation is assigned to my group.
- Sound:**
 - Play a sound every time I receive a notification

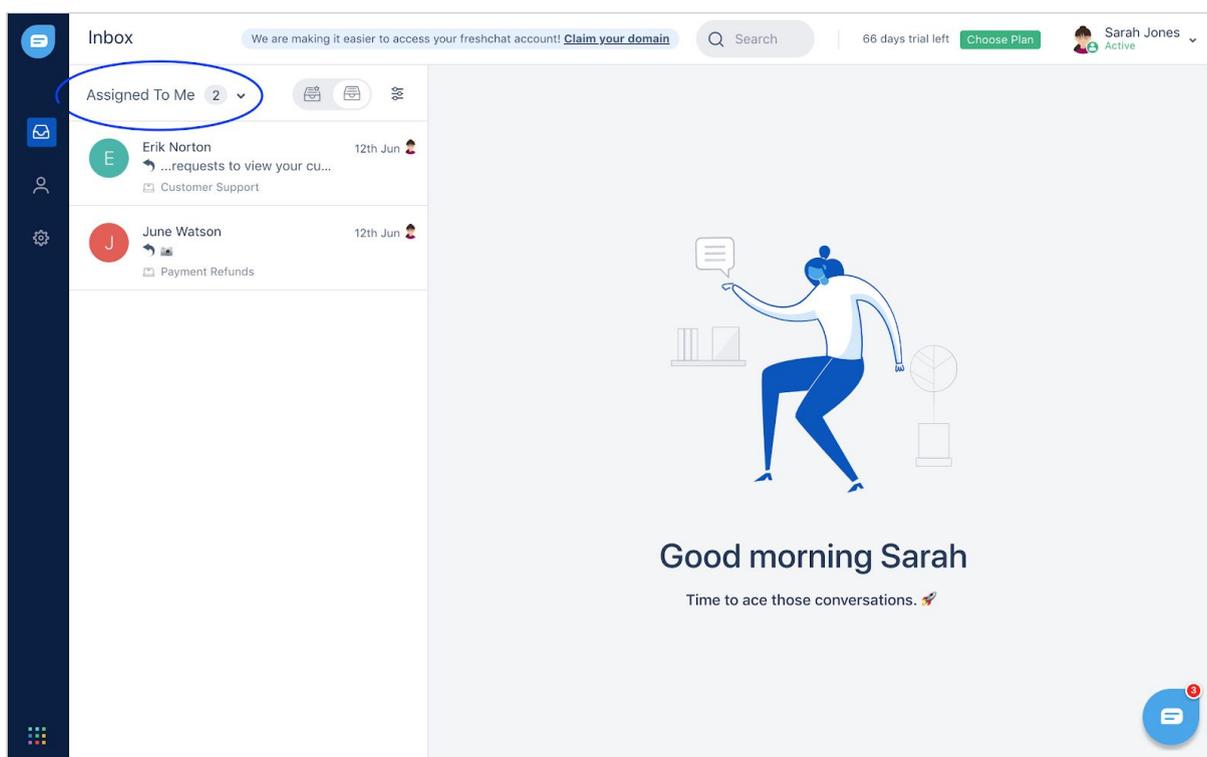
A blue 'Save' button is located at the bottom of the notification settings panel.

3. The Freshchat Inbox

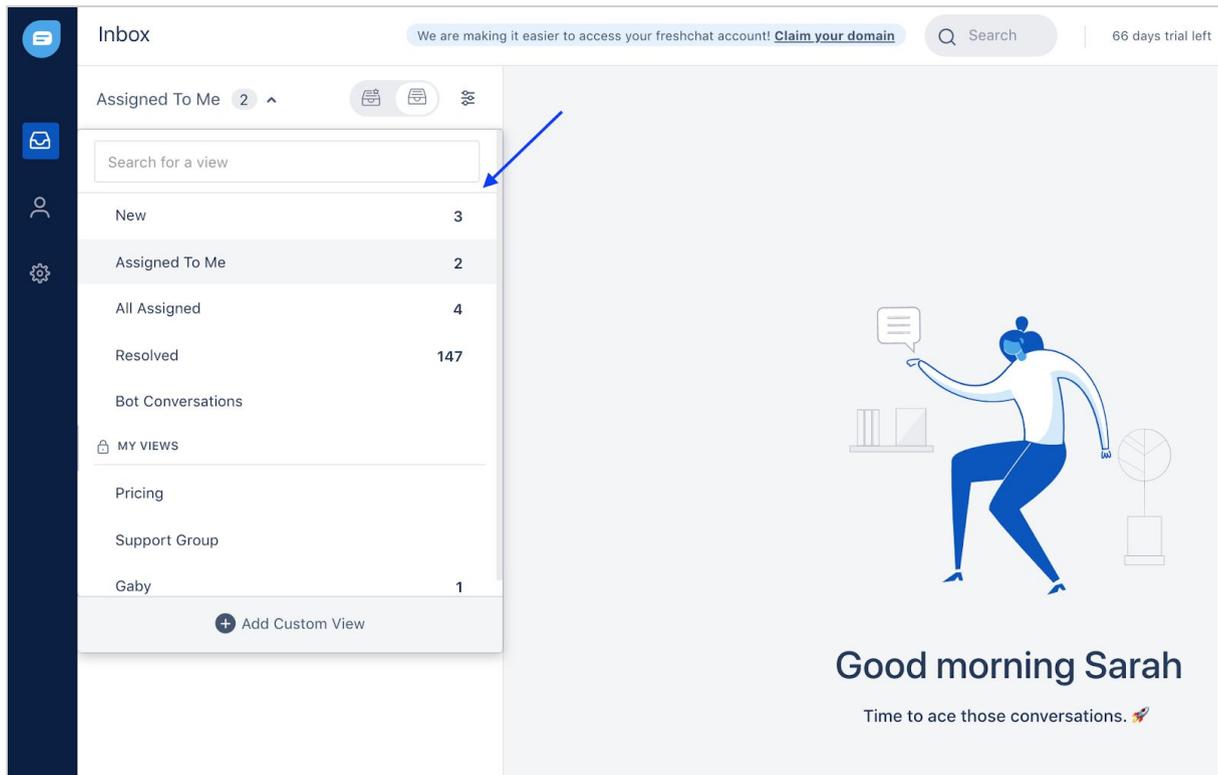
If you're a team member, the Freshchat Inbox is where you will be spending most of your time, engaging with customers and leads. The Freshchat Inbox is easy to navigate and it comes with a lot of features which will help you reply faster and better.

Stay on top of conversations

When you land on the Freshchat Inbox, you will be able to see the list of messages in your queue pending replies (if any). Each message thread includes the username, the [message channel](#) through which the chat was initiated, and how long it's been since the message came in so you can figure out who to reply first.



Some queries can be too urgent to be left waiting in the chat queue. You can pick up new conversations or chats assigned to other team members by going through the View list and ensure no message goes unanswered.



Freshchat Inbox comes with five pre-defined views,

- New conversations - are chats that haven't been assigned to anyone in your team yet,
- Assigned to me - are chats that have been assigned to you,
- All assigned - displays the list of all chats assigned to other members in your team,
- Resolved - consists of all the chats that have been responded to and resolved by you and your team, and
- Bot conversations - include all chats that are currently being handled by the bots.

The screenshot shows the Freshchat inbox interface. At the top, the word "Inbox" is displayed. To the right, there is a status indicator that says "We are making". Below this, the current view is "Assigned To Me" with a count of "2" and an upward arrow. There are icons for filters and settings. A search bar is present with the placeholder text "Search for a view". Below the search bar is a list of views:

View Name	Count
New	3
Assigned To Me	2
All Assigned	4
Resolved	147
Bot Conversations	

Below the list is a section titled "MY VIEWS" with a lock icon. Underneath, there are three custom views: "Pricing", "Support Group", and "Gaby" with a count of "1". At the bottom, there is a button labeled "+ Add Custom View".

Or, you can create custom views to keep a tab on other teams (Groups in Freshchat) or certain types of conversations like [Away conversations](#).

The screenshot shows a software interface with a dark blue sidebar on the left containing icons for a menu, a mail envelope, a person, and a gear. The main area is titled 'Inbox' and includes a notification 'We are making'. Below the title is a filter bar for 'Assigned To Me' with a count of '2' and an upward arrow, alongside icons for a calendar, a mail envelope, and a settings gear. A search bar with the placeholder text 'Search for a view' is positioned above a list of filters: 'New' (3), 'Assigned To Me' (2), 'All Assigned' (4), 'Resolved' (147), and 'Bot Conversations'. A section titled 'MY VIEWS' with a lock icon contains three items: 'Pricing', 'Support Group', and 'Gaby' (1). At the bottom, there is a button labeled '+ Add Custom View'.

To create a custom view,

Click Add Custom View > fill in the details > click Save.

You can also share the custom views that you create with other team members. Just select the 'Share this with your team' checkbox.

The image shows two overlapping screenshots of a software interface. The left screenshot displays an 'Inbox' view with a list of items: 'Assigned To Me' (2), 'New' (3), 'All Assigned' (4), 'Resolved' (147), 'Bot Conversations', 'MY VIEWS', 'Pricing', 'Support Group', and 'Gaby' (1). A blue circle highlights the '+ Add Custom View' button at the bottom of the list. The right screenshot shows the 'Add Custom View' dialog box. It includes a 'View Name' field with the text 'Returns and Exchange', a 'Choose channels' field with 'Returns And Exchange' selected, a 'Filter by status' section with 'New' and 'Assigned' checked, and a 'Choose groups' field. At the bottom, there is a 'Share this view with your team' checkbox which is checked, and 'Save' and 'Cancel' buttons.

Inbox We are making it

Assigned To Me 2 ^

Search for a view

New	3
Assigned To Me	2
All Assigned	4
Resolved	147
Bot Conversations	
MY VIEWS	
Pricing	
Support Group	
Gaby	1

+ Add Custom View

Inbox We are making it

Assigned To Me 2 ^

Add Custom View

View Name

Returns and Exchange

Choose channels

Returns And Exchange

Filter by status

New Assigned Resolved

Choose groups

Filter by group

Choose agents

Filter by team member

Show 'Away Conversations' only

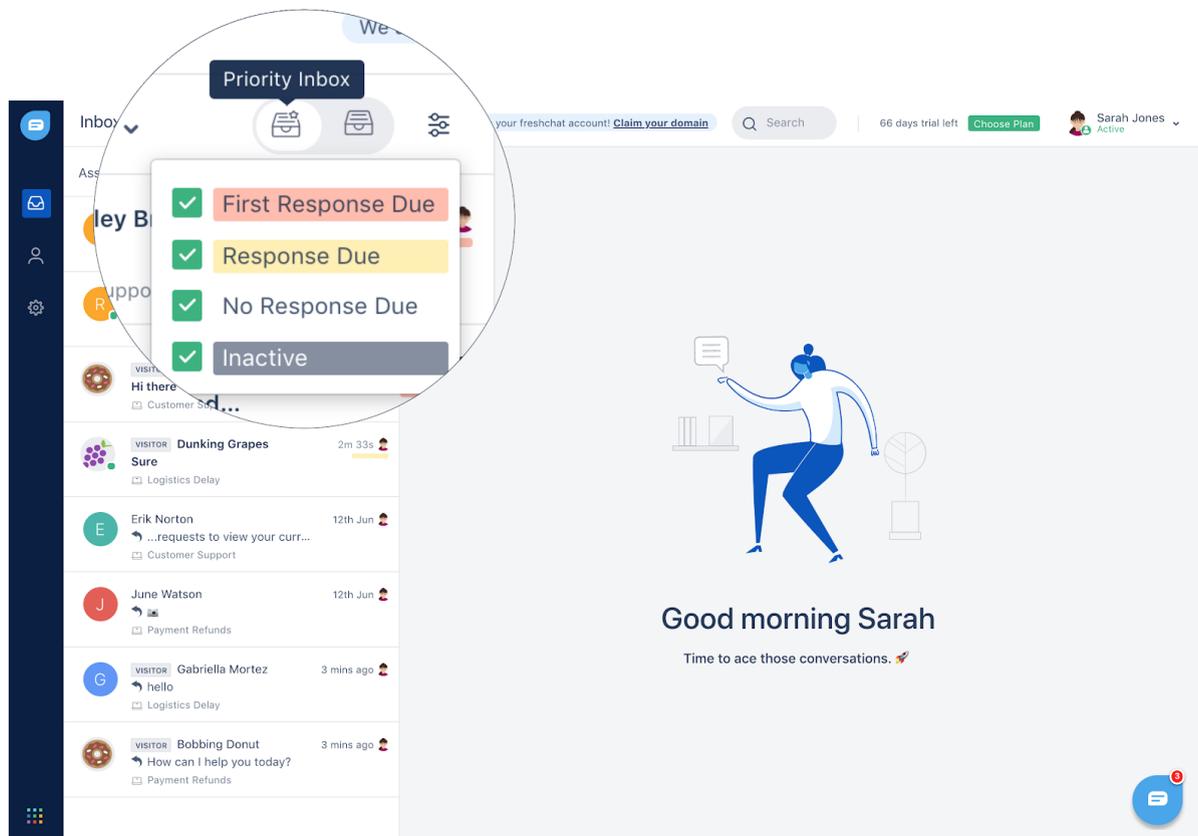
Share this view with your team

Save Cancel

Prioritize and reply faster

At times you might have a lot of messages in your chat queue, especially during peak hours, and you might not know which message to pick up and respond first.

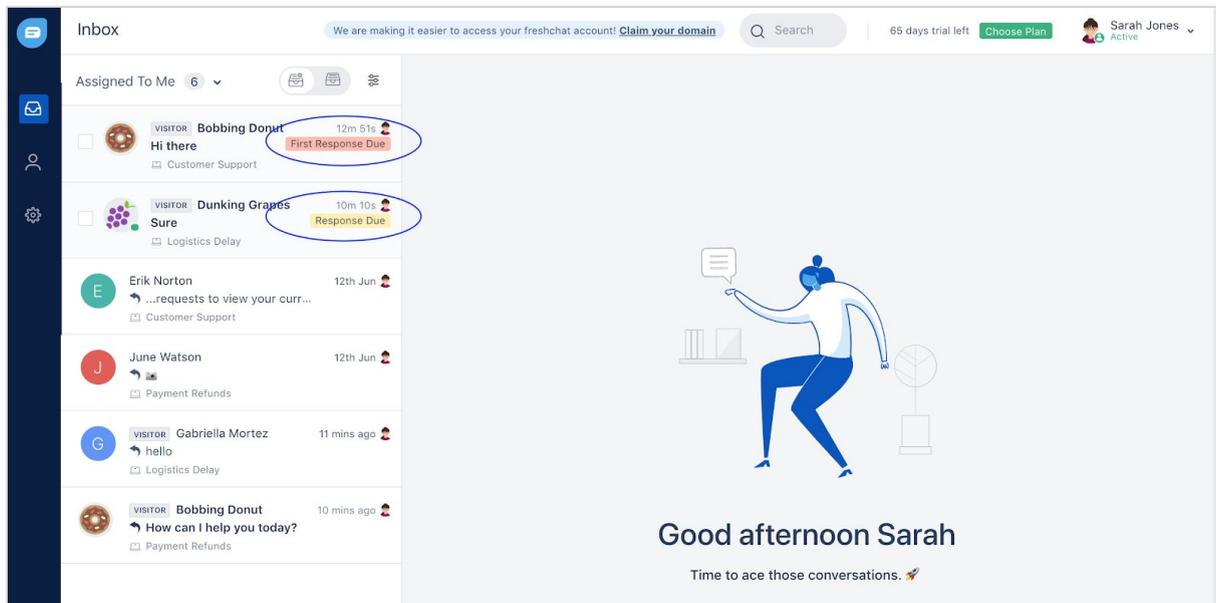
Switch to Priority Inbox and it will visually segment messages based on your customer's wait time.



Priority Inbox highlights the time for which the messages have been waiting in your chat queue,

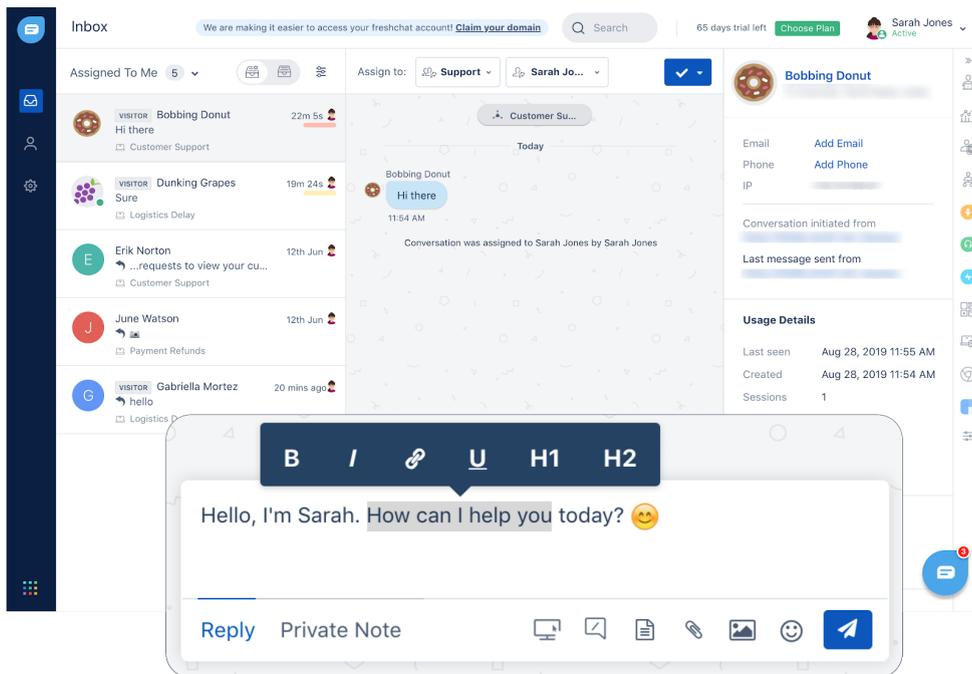
- First Response Due - You are yet to send the first reply to the user from your side.
- Response Due - You have replied to the first message from the user but haven't replied to subsequent messages from them.
- No Response Due - You have responded to the customer and there are no subsequent messages from them.

By identifying messages that need your immediate attention, you can reply faster and improve your CSAT scores.



Compose your message

Freshchat comes with all the features of a modern text editor. When you compose your reply, you can format it, add hyperlinks, and even add rich media like emojis and images.



Save time with pre-saved replies

Most often, customers tend to come with repetitive queries. And answering the same question, again and again, becomes tedious. By pre-saving answers to these commonly asked questions as Canned Responses, all you have to do is type the right shortcode and hit send.

The screenshot shows a chat window with a conversation history on the left and a detailed view of a message from June Watson on the right. A modal window is overlaid on the chat, displaying a list of canned responses. The responses are:

- /helpqn**: Do you need help with anything el... (General)
- /help**: How can I help you today? 😊 (General)
- /exchange?**: Why do you want to exchange the ... (Support)

At the bottom of the modal, there is a search bar, a 'Reply' button, and a 'Private Note' button. The chat interface also shows a sidebar with various icons and a top navigation bar with a search bar and user information.

Canned Responses shorten your response time while keeping your replies personalized.

To create new Canned Responses,

Go to Settings > Canned Responses > New Canned Response

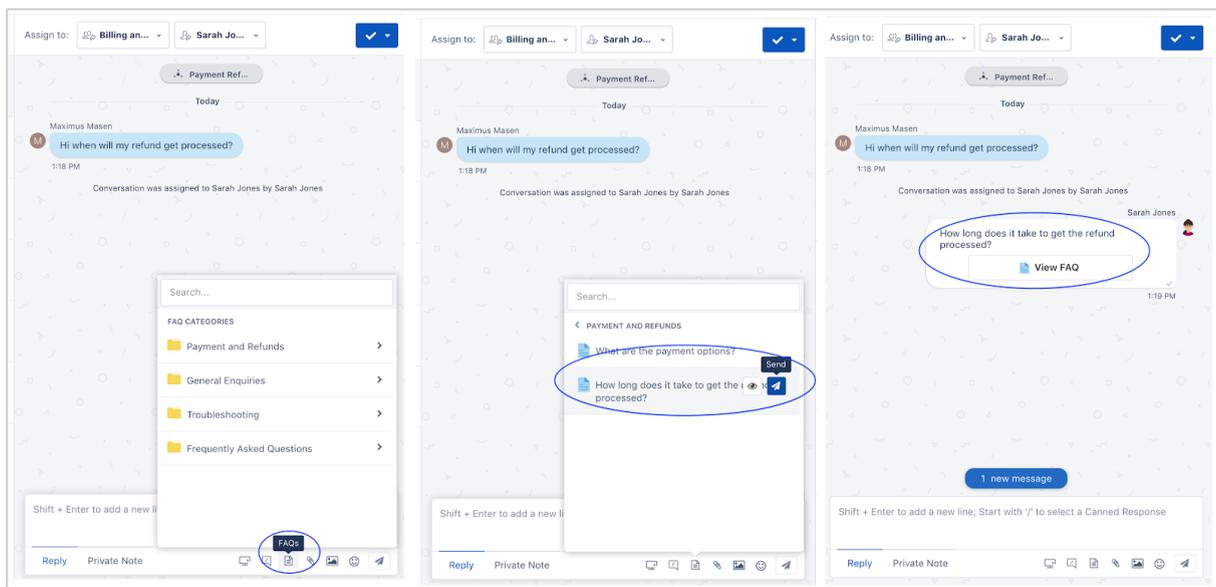
The screenshot shows the 'Canned Responses' settings page. The 'New Canned Response' button is circled in blue. The page displays a table of existing canned responses under the 'Payment and Refunds' category. The responses are:

SHORT CODE	RESPONSE
<input type="checkbox"/> /refund	Refund processing It usually takes 3-7 working days for the refund amount to get credited back to y...
<input type="checkbox"/> /paymentoption	What are the different payment options You can make payments using one of the following ways:

The page also shows a sidebar with various icons and a top navigation bar with a search bar and user information.

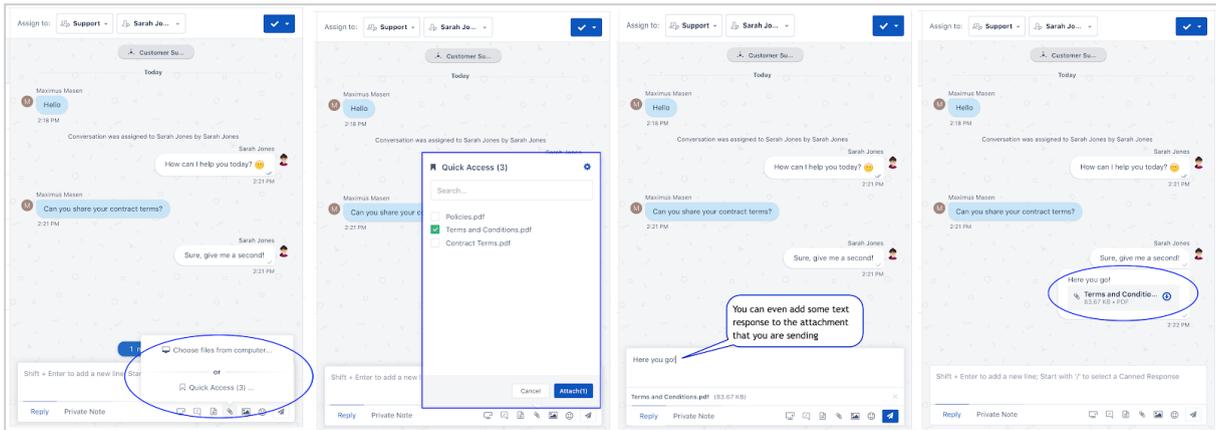
Note As a team member, you can create canned responses for your personal use and access those shared by your Admin. But you won't be able to contribute to the shared repository.

You can also attach FAQs to your replies.



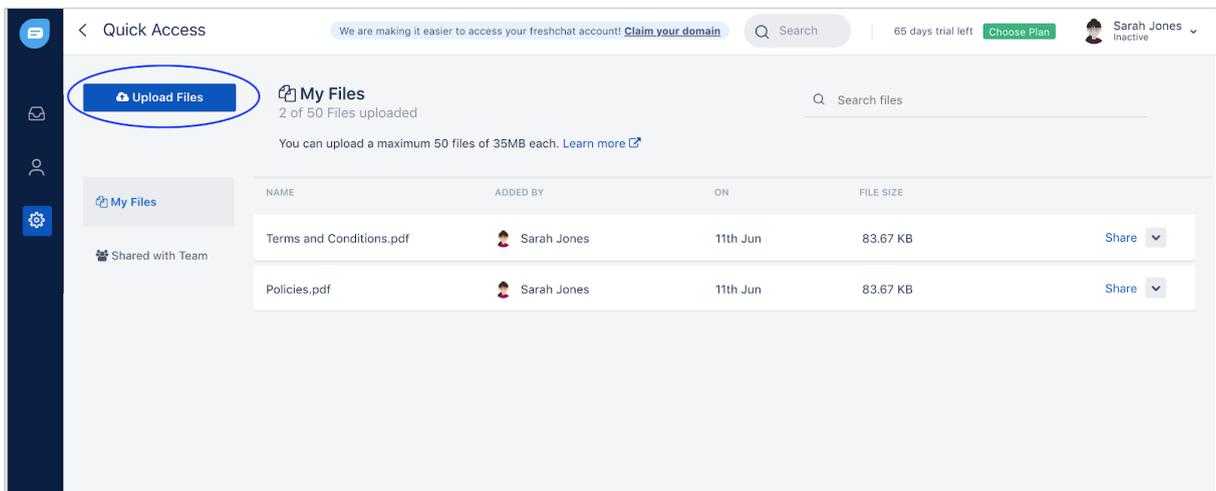
Share files and attachments

You can send file attachments to customers from your system or from the Quick Access repository. Quick Access is like your G-drive or Dropbox within Freshchat where you can upload and store files for easy access.



To upload files to Quick Access,

Go to Settings > Quick Access > Upload Files

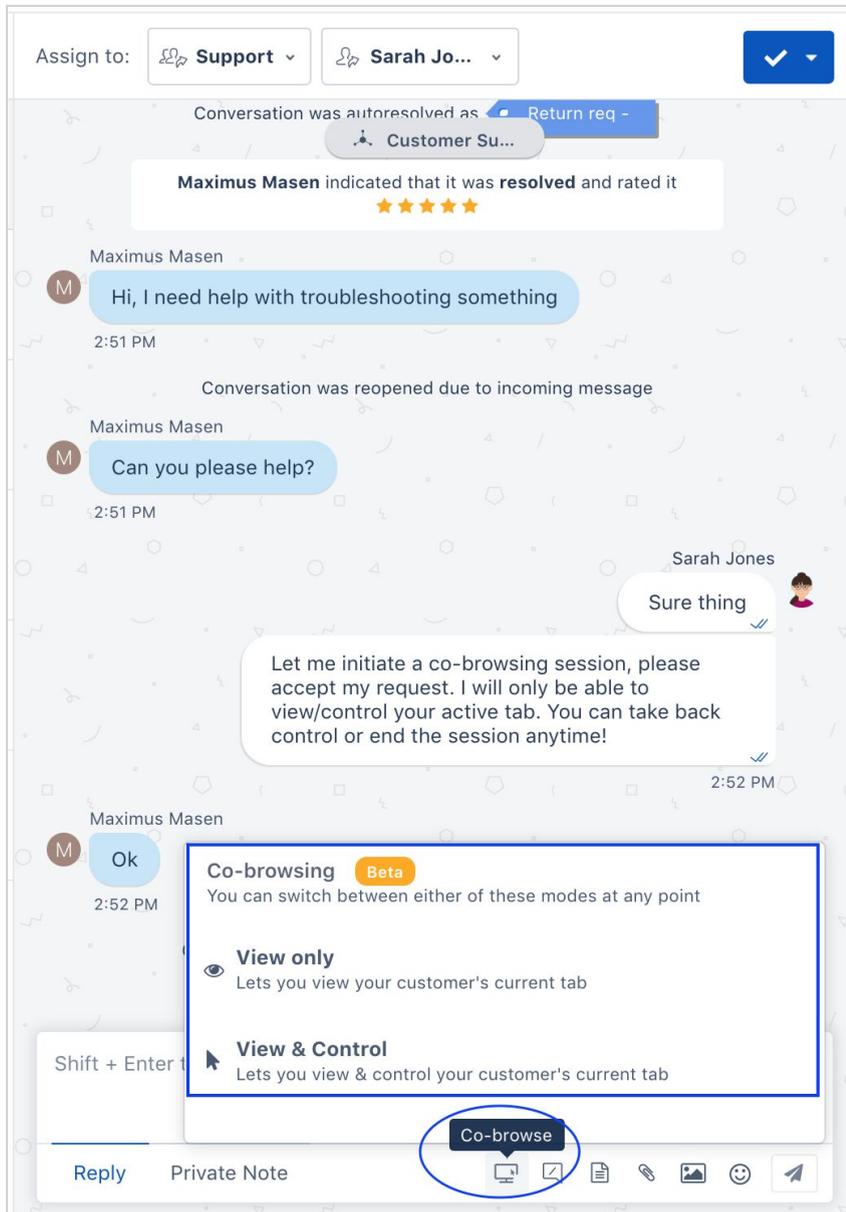


Note As a team member, you can upload files to your personal folder and access those shared by your Admin. But you won't be able to contribute to the shared repository.

Troubleshoot issues with screen sharing capability

At times might need more than just messaging to support your customers. For example, to troubleshoot an issue, you might require audio and screen sharing capability. You can do just that with Co-browsing.

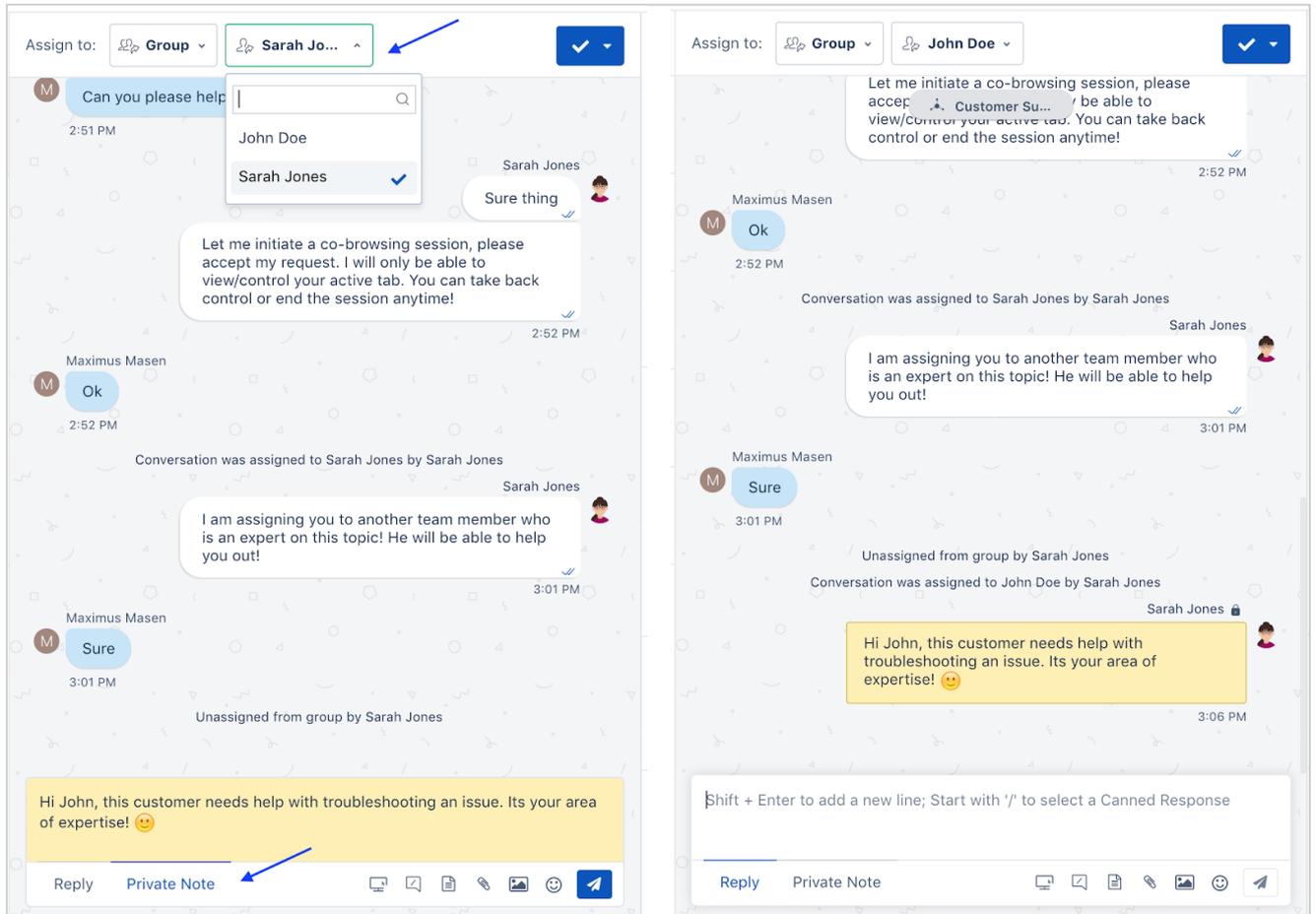
You can request and get access to your customer's screen and help them remotely.



Collaborate with your team and support better

Sometimes you may have to loop in other team members on a conversation, to answer product questions, share ideas, get confirmation on something before you respond, or just simply to pass on some positive feedback.

When you assign a conversation to another team/team member, you can add a Private Note to give them context. This will be visible only to your team, your customers can't see it.



Resolve conversations

Once you have solved a customer's query, you can close the conversation by resolving it.

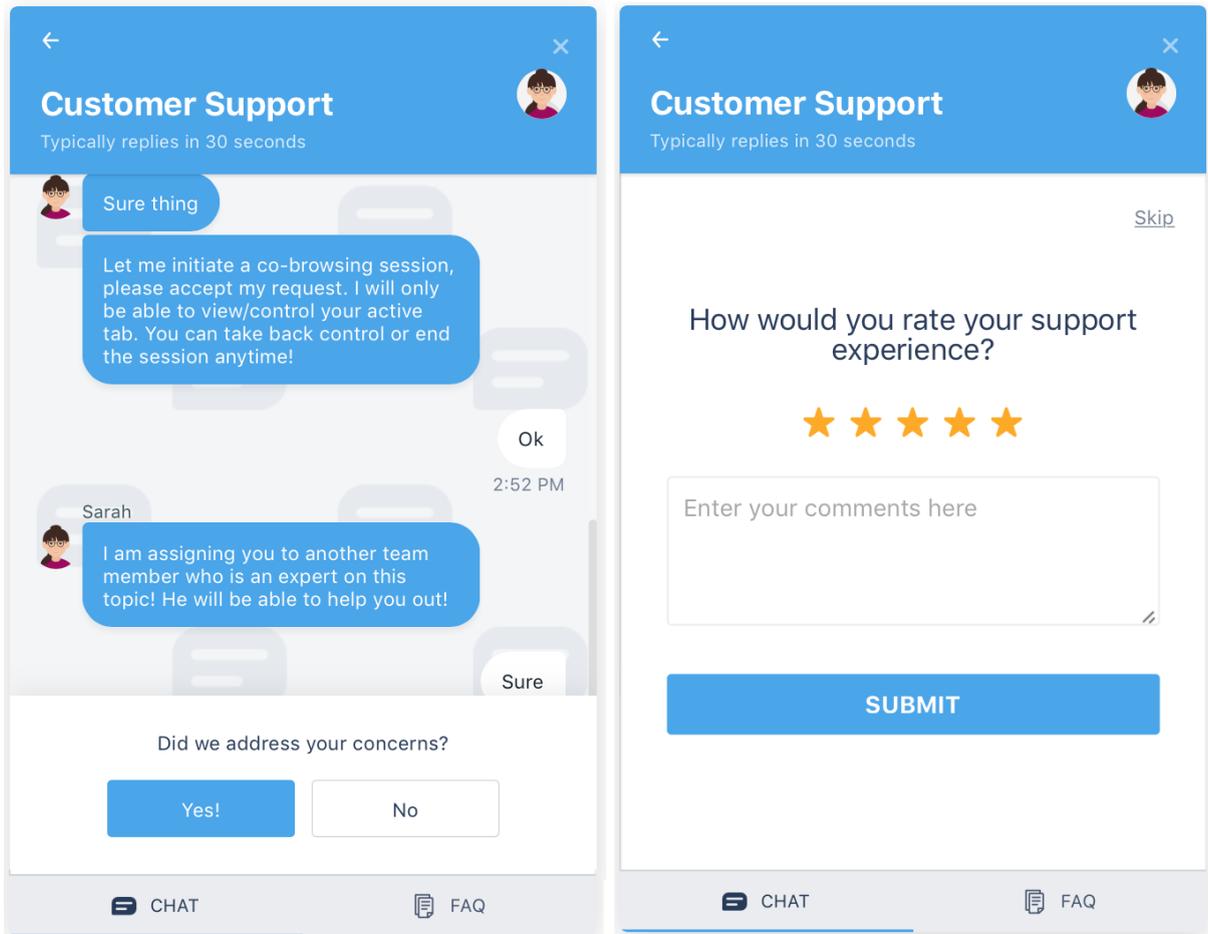
The screenshot shows a Freshchat inbox interface. On the left is a sidebar with navigation icons. The main area displays an 'Inbox' with a list of messages. A message from June Watson is selected, showing a conversation history with a video and a text message. A dropdown menu is open over the message, listing actions: 'Resolve', 'Resolve And Create Ticket In Freshdesk', and 'Resolve And Create Ticket In Freshservice'. The right sidebar shows user details for Sarah Jones, including session and notification settings.

Resolved messages move into the Resolved view, from where you can access it anytime.

The screenshot shows the 'Resolved' view in Freshchat. The left sidebar lists various views: 'New', 'Assigned To Me' (4), 'All Assigned' (7), 'Resolved' (152, circled in blue), 'Bot Conversations', and 'MY VIEWS' (Pricing, Support Group, Gaby). The main area features a large illustration of a person sitting at a desk with a speech bubble, and the text: 'Good afternoon Sarah' and 'Time to ace those conversations.' The top of the interface includes a search bar, a '65 days trial left' indicator, and a 'Choose Plan' button.

Be a customer champion

When you resolve a conversation, your visitor or customer will be prompted with a customer satisfaction survey (CSAT) asking them to rate their support experience with you.



You can find their rating and comments, if any, at the end of the conversation.

Assign to: Group John Doe

Ok
2:52 PM

Customer Su...

Conversation was assigned to Sarah Jones by Sarah Jones

Sarah Jones

I am assigning you to another team member who is an expert on this topic! He will be able to help you out!

3:01 PM

Sure
3:01 PM

Unassigned from group by Sarah Jones

Conversation was assigned to John Doe by Sarah Jones

Sarah Jones

Hi John, this customer needs help with troubleshooting an issue. Its your area of expertise! 😊

3:06 PM

Conversation was resolved by Sarah Jones as as

Maximus Masen indicated that it was **resolved** and rated it
★★★★★

Shift + Enter to add a new line; Start with '/' to select a Canned Response

Your Admin can track this score for each conversation. By replying faster, and improving customer satisfaction, you can keep your score in check.

Perform bulk actions

Support can get too busy at times. Freshchat makes it easy to deal with multiple conversations at once with bulk actions.

You can bulk assign messages to other teams/team members, send bulk replies and also bulk resolve (close) messages.

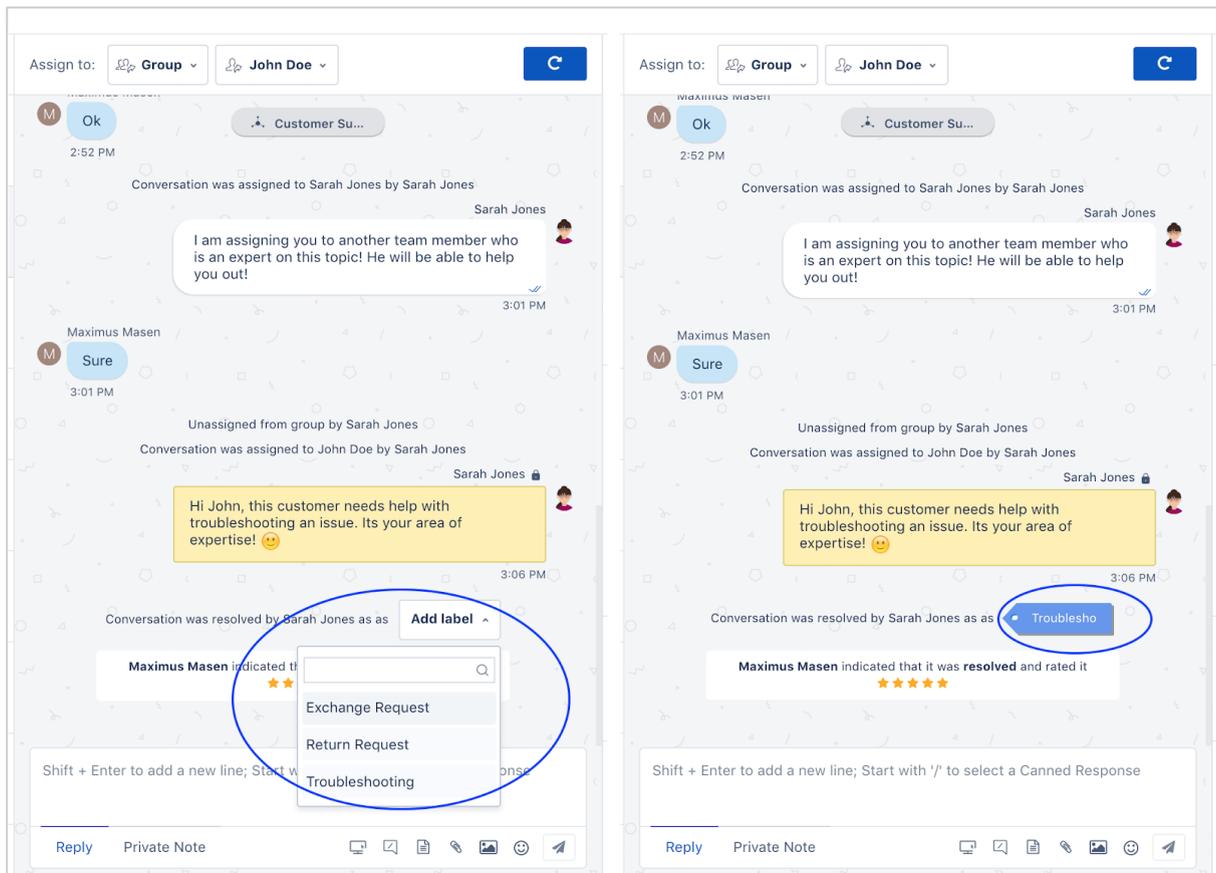
The screenshot displays the Freshchat interface with several callouts explaining bulk actions:

- Bulk select conversations:** A callout points to the 'Select All' checkbox in the inbox list.
- You can bulk assign messages to another team member/group:** A callout points to the 'Assign to:' dropdown menu, which is open to show a search bar and a list of team members (John Doe, Sarah Jones).
- Click Resolve to resolve all the selected conversations:** A callout points to the 'Resolve' button in the context menu.
- You can also send out a bulk response to the selected conversations:** A callout points to the 'Reply' button in the bottom right corner of the chat window.

The interface shows an inbox with three conversations. The selected conversation is open, showing a message from Maximus Masen: "Hello, my delivery is yet to arrive. Its already been 7 days." and a response from Sarah Jones: "Hello" and "Let me look into this". The right sidebar shows 'Usage Details' and 'User Properties' for the selected conversation.

Help track your user problems

As a customer support rep, you might handle different customer queries, from support queries, feedback, feature requests, bugs and much more. You can track all of these queries by adding a label to the conversations once you resolve them.



By adding labels to conversations, you can help your team lead (Account Owner or Admin) to track these conversations over time and identify a pattern of what your visitors and customers are actually trying to tell you about your product or service.

Know who you're talking to

Context is everything when it comes to supporting and sales. While communicating with a visitor or customer, you can get all the context you need about them right within the Freshchat Inbox.

This includes information on their username, email ID, IP address, the page the conversation was initiated from, navigation timeline of the pages visited to even purchase history, transaction status, and other details from your CRM or any third-party app.

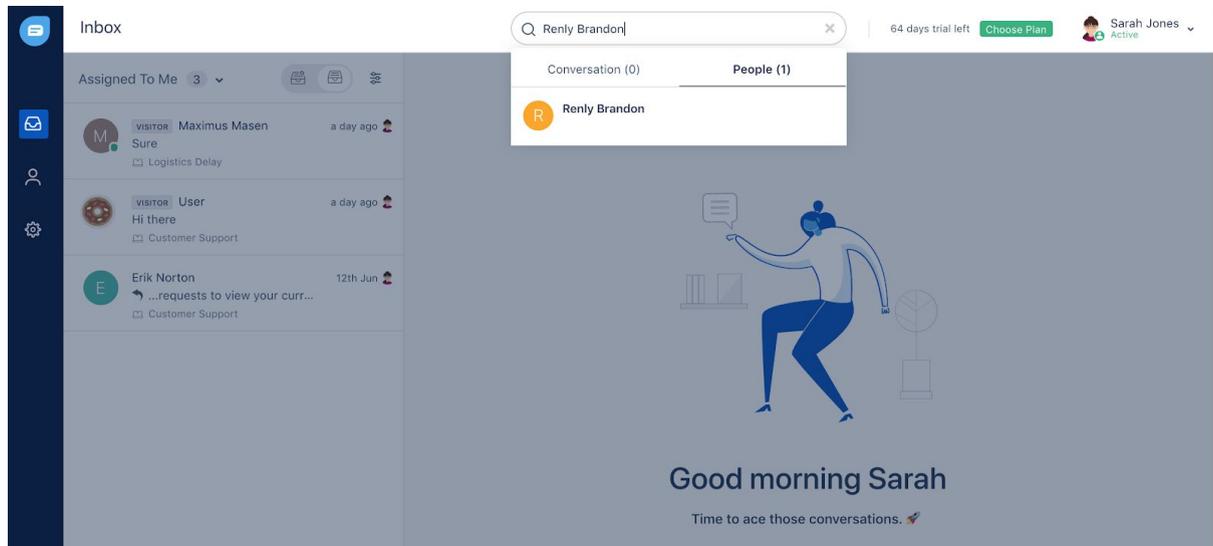
The screenshot displays the Freshdesk chat interface for a user named Veronica. The interface is divided into several sections:

- User Profile:** Veronica, New York City, United States. Contact information includes Email (veronica@example.com), Phone (238898372798), IP (65.62.0.0), and Social links.
- Events Timeline:** A vertical timeline for August 20, 2019, showing page visits at 3:32 PM and 3:27 PM.
- Smart Plugs:** A search history section showing flight options from ARN to LHR, including times, durations, and prices.
- Usage Details:** Last seen (Aug 20, 2019 3:39 PM), Created (Aug 20, 2019 3:39 PM), Sessions (1), Push (No), and Notifications (Enabled).
- User Properties:** Frequent Flyer (398129391839128).
- Device Properties:** WEB, os (Web), browser (Chrome), browserVersion (76.0.3809.100), and device (desktop).
- Freshsales:** A section for closing deals faster by getting information on existing leads.

You can also customize this space by adding apps of your choice from the Integrations page.

Search conversations

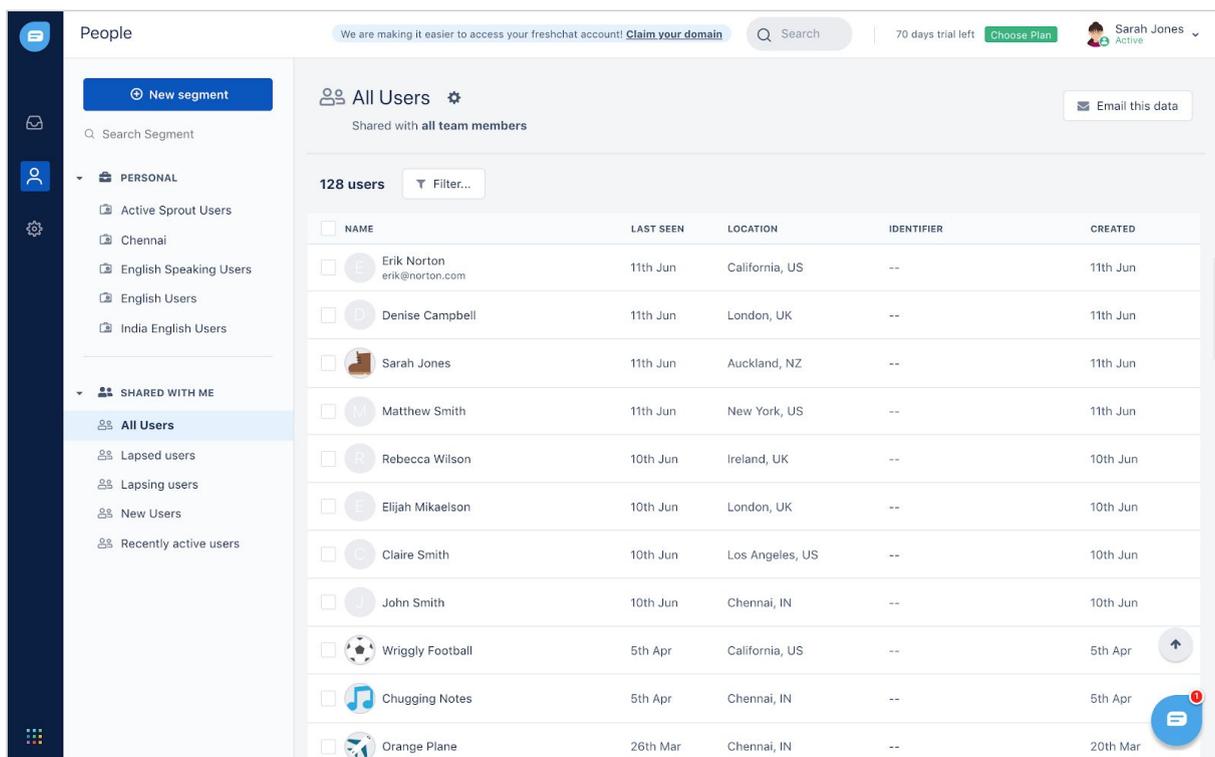
In Freshchat, you can search for people or conversations with a user name or email ID using the search icon on the top.



4. The People tab

In the People tab, you can see a list of all your leads and customers who have ever interacted with you using the Freshchat messenger.

Here you can search for users, create a new user segment, and export the data to your email.



The screenshot displays the 'People' tab in the Freshchat interface. The left sidebar contains navigation options: 'New segment', 'Search Segment', 'PERSONAL' (with sub-items: Active Sprout Users, Chennai, English Speaking Users, English Users, India English Users), and 'SHARED WITH ME' (with sub-items: All Users, Lapsed users, Lapsing users, New Users, Recently active users). The main content area shows 'All Users' with a gear icon and a search bar. Below this, it indicates '128 users' and a 'Filter...' dropdown. A table lists the following users:

NAME	LAST SEEN	LOCATION	IDENTIFIER	CREATED
<input type="checkbox"/> Erik Norton erik@norton.com	11th Jun	California, US	--	11th Jun
<input type="checkbox"/> Denise Campbell	11th Jun	London, UK	--	11th Jun
<input type="checkbox"/> Sarah Jones	11th Jun	Auckland, NZ	--	11th Jun
<input type="checkbox"/> Matthew Smith	11th Jun	New York, US	--	11th Jun
<input type="checkbox"/> Rebecca Wilson	10th Jun	Ireland, UK	--	10th Jun
<input type="checkbox"/> Elijah Mikaelson	10th Jun	London, UK	--	10th Jun
<input type="checkbox"/> Claire Smith	10th Jun	Los Angeles, US	--	10th Jun
<input type="checkbox"/> John Smith	10th Jun	Chennai, IN	--	10th Jun
<input type="checkbox"/> Wiggly Football	5th Apr	California, US	--	5th Apr
<input type="checkbox"/> Chugging Notes	5th Apr	Chennai, IN	--	5th Apr
<input type="checkbox"/> Orange Plane	26th Mar	Chennai, IN	--	20th Mar

The interface also includes a 'Claim your domain' link, a search bar, a '70 days trial left' indicator, a 'Choose Plan' button, and a user profile for 'Sarah Jones Active' in the top right corner. A 'Email this data' button is located in the top right of the user list area.

When you click on a user, you'll be taken to their profile where you can see all their details. You can also initiate/reply to messages from here.

< Veronica
Q vimala
Sarah Jones Active

Veronica
New York City, United States

Email: veronica@example.com
Phone: 238898372798
IP: 65.65.0.0
Social: [Social](#)

Existing Conversations

- Gold Member**
sure
- Start a new conversation**
- Activities and Experiences**
No conversations yet
- Allgemeine Beratungen**
No conversations yet
- Booking cancellation/modification**
No conversations yet
- Cancellation and Refunds**
No conversations yet
- Cancellation and Refunds**
No conversations yet
- Concierge services**
No conversations yet
- Feedback and suggestions**

Assign to: Billing te... Team me...

Aug 20, 2019

Vimala Ganesan

Hey There,
Interested in the Polar Bear experience? Hurry to register here as the seats are filling in fast!

3:32 PM

Veronica

Hi, i am interested in polar bear experience

3:35 PM

Trek-Bot

Hello there! I'm Trek-Bot. Before we go ahead, can I get your email address? In case we get lost, I can always get back to you.

3:35 PM

Veronica

Veronica

3:36 PM

Shift + Enter to add a new line; Start with '/' to select a Canned Response

Reply Private Note

Conversation initiated from Polar Bear Experience – Trek Trail and...

Last message sent from Polar Bear Experience – Trek Trail and...

Events Timeline

Aug 20, 2019

- 3:32 PM Visited Page Polar Bear Experience – Tr...
- 3:32 PM Visited Page Trek Trail and Travel – Peo...
- 3:27 PM Visited Page Polar Bear Experience – Tr...
- 3:26 PM Visited Page Trek Trail and Travel – Peo...
- 3:25 PM Visited Page Trek Trail and Travel – Peo...

[View All](#)

Smart Plugs

Search History

ARN - LHR
Thu 22 Feb

3816:-
SEK/person

07:55 - 09:35
Duration: 2h 40m

3936:-
SEK/person

09:35 - London, Heathrow
Carrier: Scandinavian Airlines, SK525, Boeing 737-700

4393:-
SEK/person

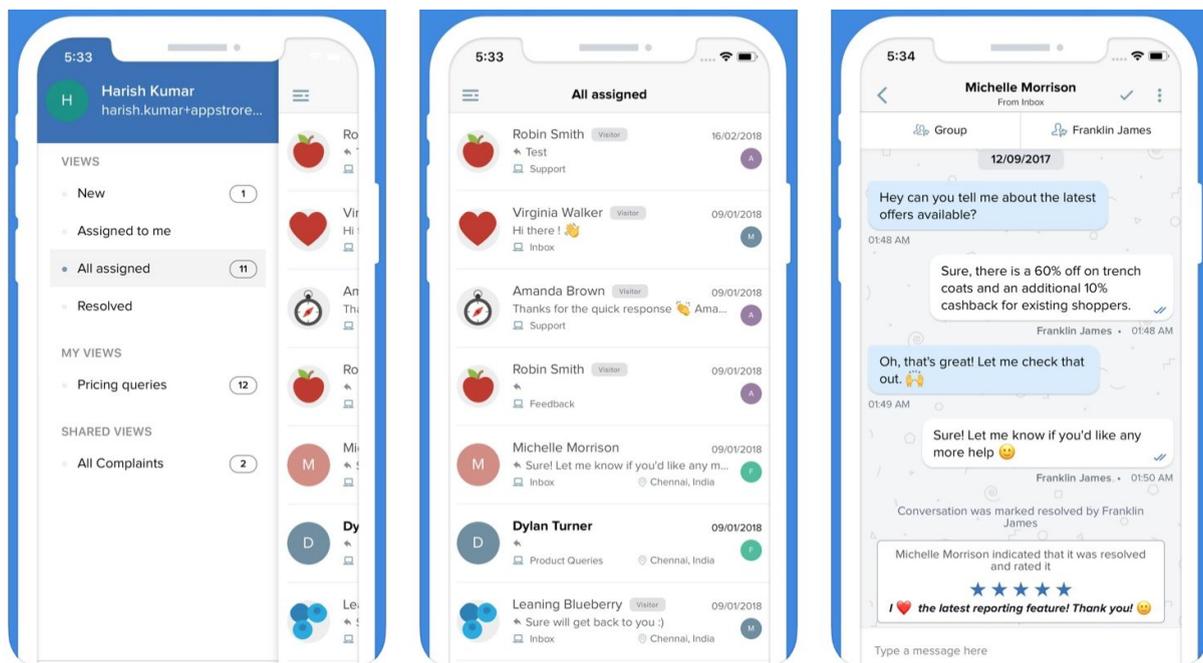
5403:-
SEK/person

Limited availability!

5. Support customers on the go

Get the Freshchat app for [iOS](#) and [Android](#) and continue customer conversations even when you're away from your desk.

Respond to customers, assign conversations, add private notes, and resolve chats on the move. Get notified when a user replies or reaches out to you with Push Notifications. Stay on top of messages even when you're not inside the app.



Further Assistance

For further assistance or query, contact our team:

Contact Person(s)

Ioane Naivalurua (Jnr)

General Manager Operations

EMAIL: ioane@pacificbedbank.com

SKYPE: live:.cid.6a338941bd54862c

John Lew

Junior Programmer

EMAIL: john@pacificbedbank.com

SKYPE: live:jlew921

Ponipate Nasilasila

Sales Executive

EMAIL: ponipate@pacificbedbank.com

SKYPE: gus.nasilasila

Physical Address

GLOBAL BEDBANK PTE LIMITED | HLB BUILDING | 3 CRUICKSHANK ROAD | NADI
AIRPORT