

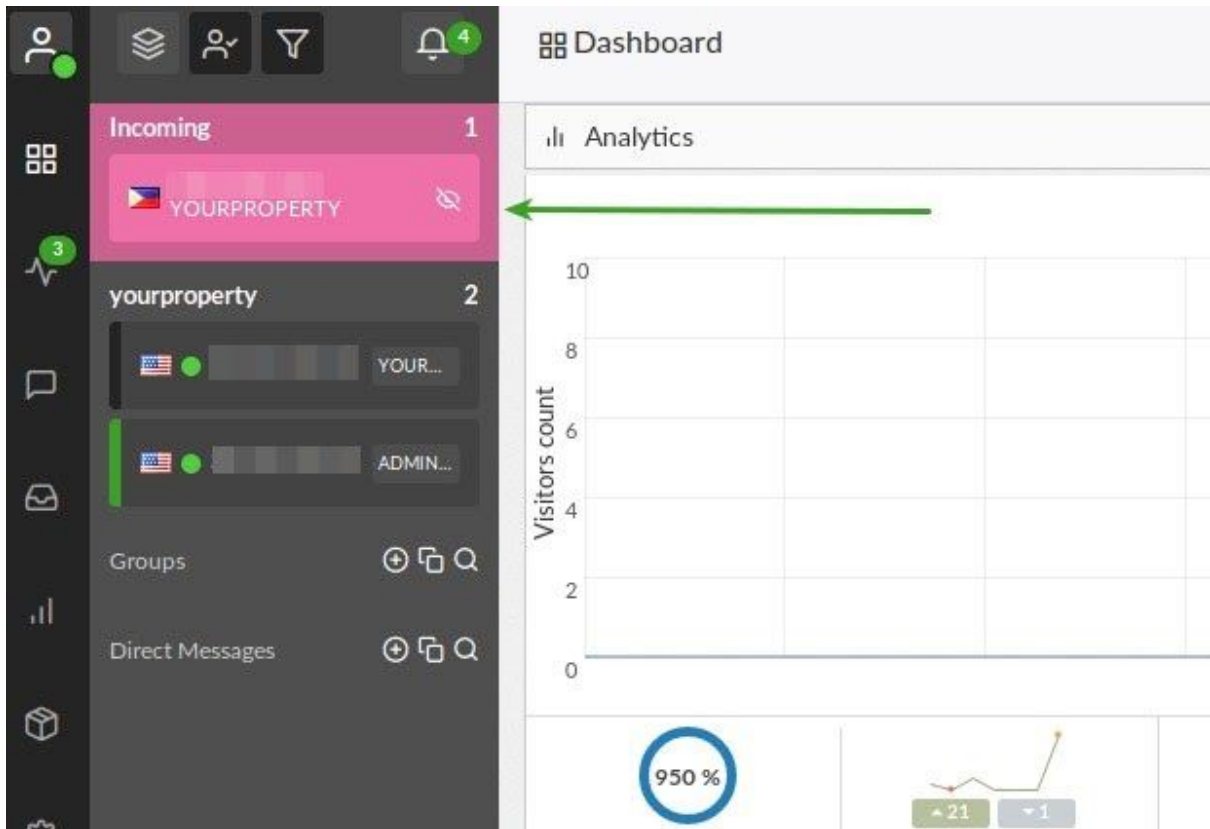
tawk.to Agent Chat User Manual

Source: tawk.to Knowledge Base | <https://www.tawk.to/knowledgebase/>

How to Answer an Incoming Chat

When someone visits your website or personal profile page and initiates a chat using the live chat widget you will hear a notification sound.

On the **left side** of the **dashboard**, you will see that visitor and the background colour will be **PINK**. That indicates you have an **incoming chat** that needs to be answered.



Answer the incoming chat by clicking on the visitor (with a PINK background) to open the chat window.

PINK Background – New incoming chat that has **not been answered**.

GREEN Bar – Chat that **YOU** have already answered and is currently active.

GRAY Bar – Chat that is active but **ANOTHER agent** has answered.

Then click on the **JOIN BUTTON** at the bottom of the chat window. Once you answer the chat that visitor will have a green background.



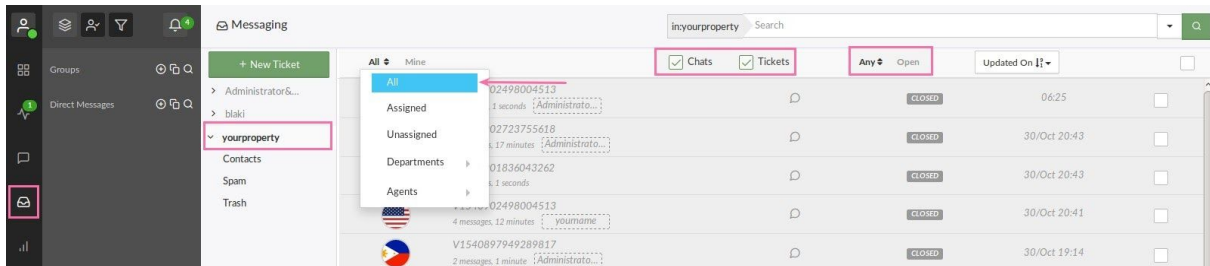
You can use the menu to **select which Alias** you would like to join the chat with. The **Alias names** will appear when you click on the menu. **Select the Alias** and then click the **green Join button**.



Viewing Chat History

You can view the **History** for any chat from your website, tawk.to page or personal profile page.

Click on the **Messaging** icon on the **Left Sidebar** of the Dashboard.



From the **list on the left** click on the **name of the Site, tawk.to Page or Profile Page** you wish to view past messages from. Then **click ALL** on the left of the message view area.

You will see all **closed chats, missed chats and tickets** in this area. You can sort them by **Open, Pending or Closed**.

Miss chats can be viewed quickly by selecting **Unassigned** as a filter.

Click on a Message in the list of Messages. A window will open where you can view the chat transcript or ticket as well as other details such as Visitor Location, IP Address, Notes, Last Visit, etc.

Search Chat History

You can use the search box above the messaging section to quickly find a chat or ticket.

Delete a Chat from History

To **Delete a Chat or Message** from History simply check the box on the right side of the list next to the message you wish to delete. You can delete multiple messages at once or one at a time. Just check the box and then click on the **red delete messages** button. *You must be an Admin to delete messages in history.*






| Country | ID | Messages | Time | Status | Action |
|---------|-------------------|------------------------|--------------|--------|-------------------------------------|
| USA | V1540902498004513 | 1 message, 1 seconds | 06:25 | LOUSED | <input checked="" type="checkbox"/> |
| USA | V1540902723755618 | 4 messages, 17 minutes | 30/Oct 20:43 | LOUSED | <input checked="" type="checkbox"/> |
| USA | V1540902498004513 | 4 messages, 12 minutes | 30/Oct 20:41 | LOUSED | <input type="checkbox"/> |
| UK | V1540897737064698 | 2 messages, 2 minutes | 30/Oct 19:12 | LOUSED | <input type="checkbox"/> |
| PHL | V1540893957394743 | 2 messages, 54 seconds | 30/Oct 18:07 | LOUSED | <input type="checkbox"/> |

Export a Chat from History

To **Export a Chat or Message** from History simply check the box on the right side of the list next to the message you wish to export. You can export multiple messages at once or one at a time. Just check the box and then click on the **export messages** button. *You must be an Admin to export messages in history.*

Messaging in:yourproperty Search

+ New Ticket All Mine Chats Tickets Any Open Updated On

| | | | | |
|-------------------|------------------------------------------------------------------------------------------------------------------------------------------------|-------|--------------|-------------------------------------|
| Administrator&... |  V1540902498004513 1 message, 1 seconds; Administrato... | LOSED | 06:25 | <input type="checkbox"/> |
| blaki |  V1540902723755618 4 messages, 17 minutes; Administrato... | LOSED | 30/Oct 20:43 | <input checked="" type="checkbox"/> |
| yourproperty |  V1540902498004513 4 messages, 12 minutes; youname | LOSED | 30/Oct 20:41 | <input type="checkbox"/> |
| Contacts |  V1540897737064698 2 messages, 2 minutes; youname | LOSED | 30/Oct 19:12 | <input checked="" type="checkbox"/> |
| Spam |  V1540893957394743 2 messages, 54 seconds; Administrato... | LOSED | 30/Oct 18:07 | <input type="checkbox"/> |
| Trash | | | | |

2 messages selected

Delete messages

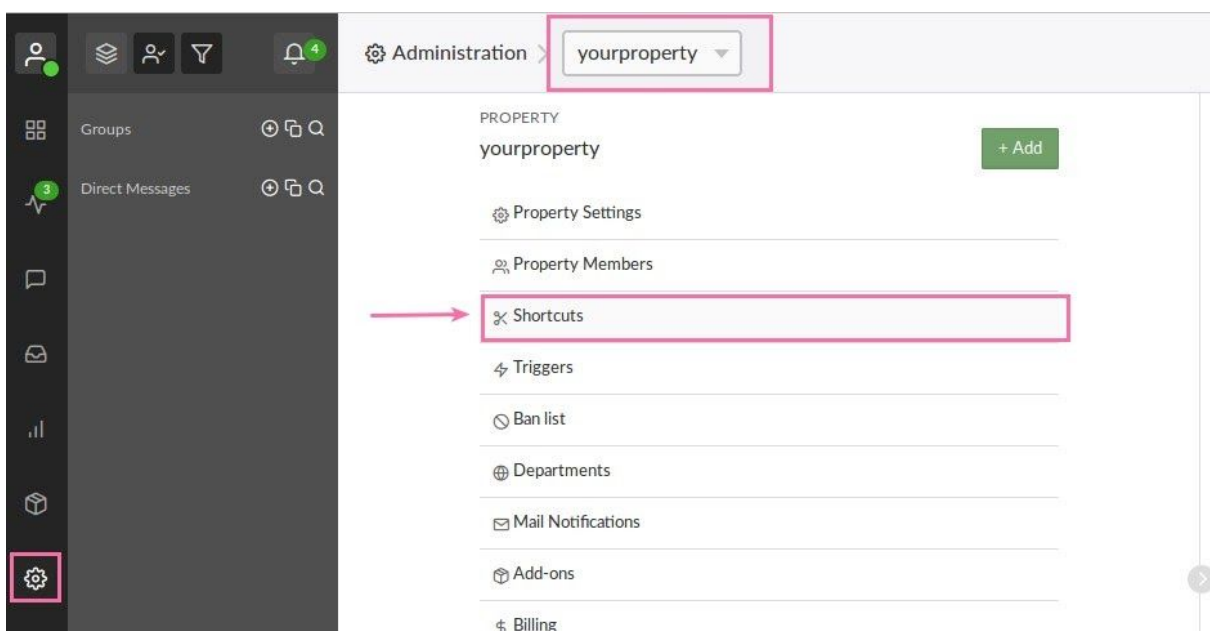
Export messages

Clear selection

Creating and Managing Shortcuts

You can create, and use Shortcuts (canned responses) to answer common questions by simply typing/triggered by a keyword. For example, you could type /hello to quickly send the visitor the text: "Hello how can we help you today?"

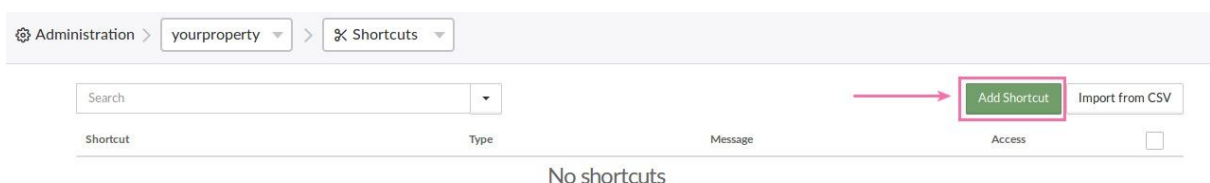
To create a **New Shortcut**, click on **Admin** at the top of the **Dashboard** and then click on **Shortcuts**.



Then **Choose the Property** the Shortcut will be used for.

Click on **Shortcuts** and you will see a screen like the **image below**. You can **Manage Existing Shortcuts** here.

Click the **Green Add Shortcut Button** at the **Top Right** of this screen to **Add a New Shortcut**



Shortcut

hello

Message

Hello, Welcome to our website. How can I help you today?

Access: Public Personal

Type: Message Survey

Cancel

Delete

Save

When you name a Shortcut remember that “hello” and “Hello” will both work but will be treated as two different shortcuts. We recommend using all lower case letters.

When naming a Shortcut **DO NOT INCLUDE THE FORWARD SLASH “/”**

1. Name the Shortcut
2. Enter the Message you want to send the visitor for that Shortcut

3. Choose whether this Shortcut is Personal (only you can see and use it) or Public (any agent can use it)

4. Choose whether this Shortcut is a message or a quick survey. (it will almost always be a message)

Edit Existing Shortcuts

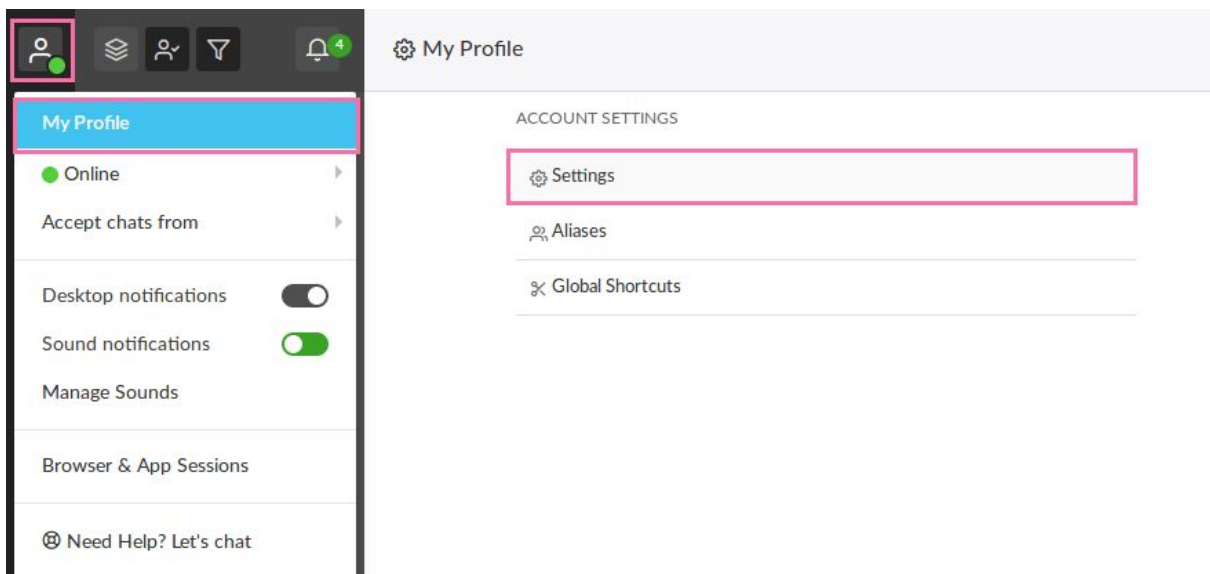
You can search for Shortcuts or choose them from the list. Click on the Shortcut you wish to edit. Click save after you have made changes.

Global Shortcuts.

Shortcuts are tied to the property they are set up for. We also allow you to create Global Shortcuts that are attached to **Your Account** and **NOT** a specific website or property. **Global Shortcuts** can be used by **YOU ONLY ON ANY PROPERTY** you have added to the dashboard. You can access these by going to **My Profile** (middle icon top right of the dashboard) then click **Global Shortcuts**.

Edit Your Tawk.to Account Settings

To **Edit** the **Account Settings** for your Tawk.to account. Navigate to the **Top Left** corner of the **Dashboard**. Click on the icon for **My Profile**. Then **Click on the Settings** option under **Account Settings**



In the **Edit Account Settings** screen, you can change the **Name, Email and the Password** for your Tawk.to account.

⚙ My Profile >

⚙ Settings ▼

Your Name

John Smith

Your Email

support@yourwebsite.com

Change Your Password

Enter Your Password

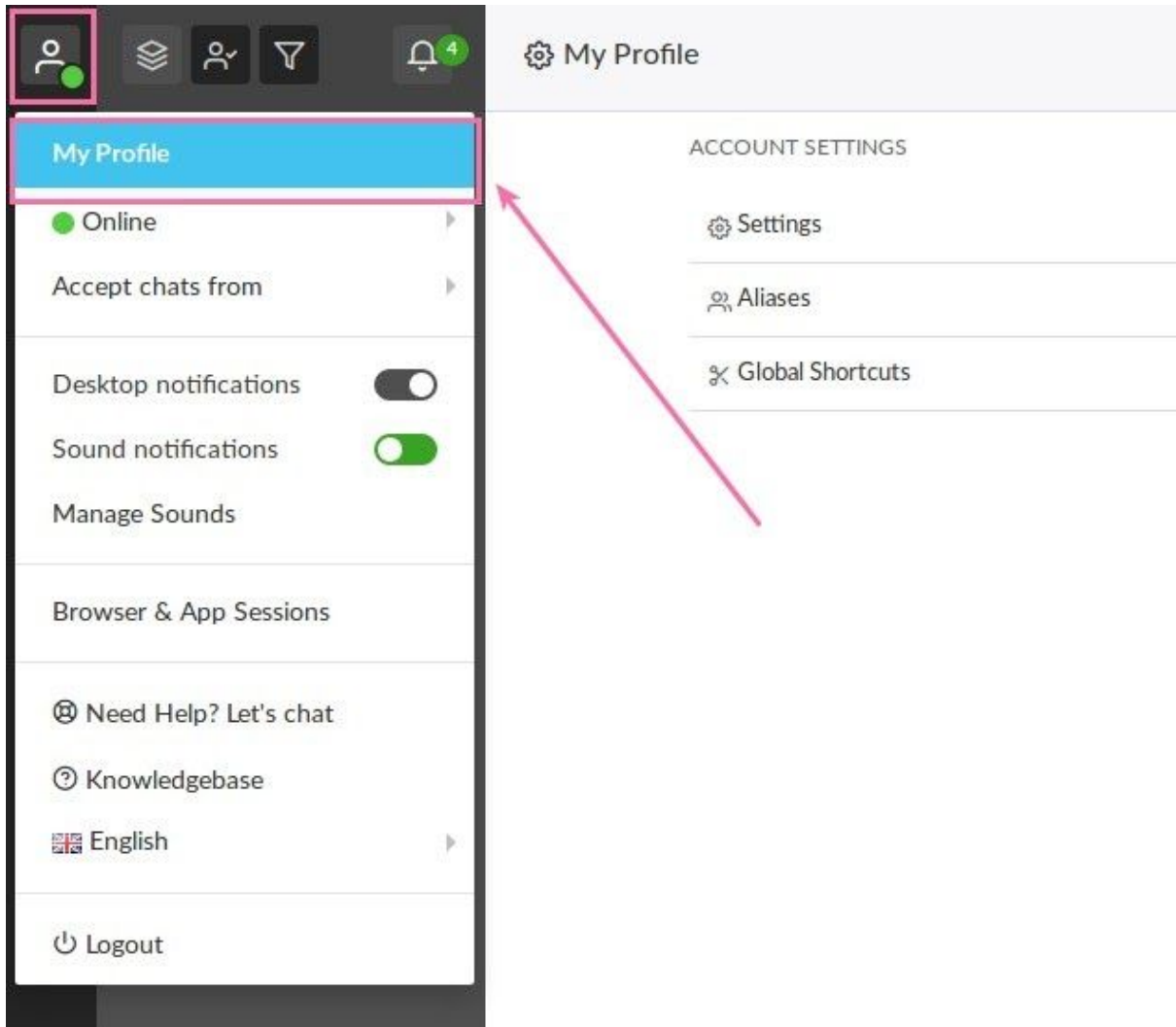
Retype Your Password

Enter Your Password

Editing Your Personal Profile Page

To Edit your free Tawk.to Personal Profile Page. Follow these steps:

1. Go to My Profile icon at the Top Left of the Dashboard



2. Choose an Option to Edit on the Right Side of the My Profile screen.

PROFILE PAGE

<https://tawk.to/yourname> 

☰ Page Content

⚙️ Widget Settings

🖼️ Widget Appearance

📄 Widget Content

⌘ Page Shortcuts

🚫 Ban list

📁 ^{NEW} Tabs

🔒 ^{NEW} Consent Form

📄 ^{NEW} Data & Privacy

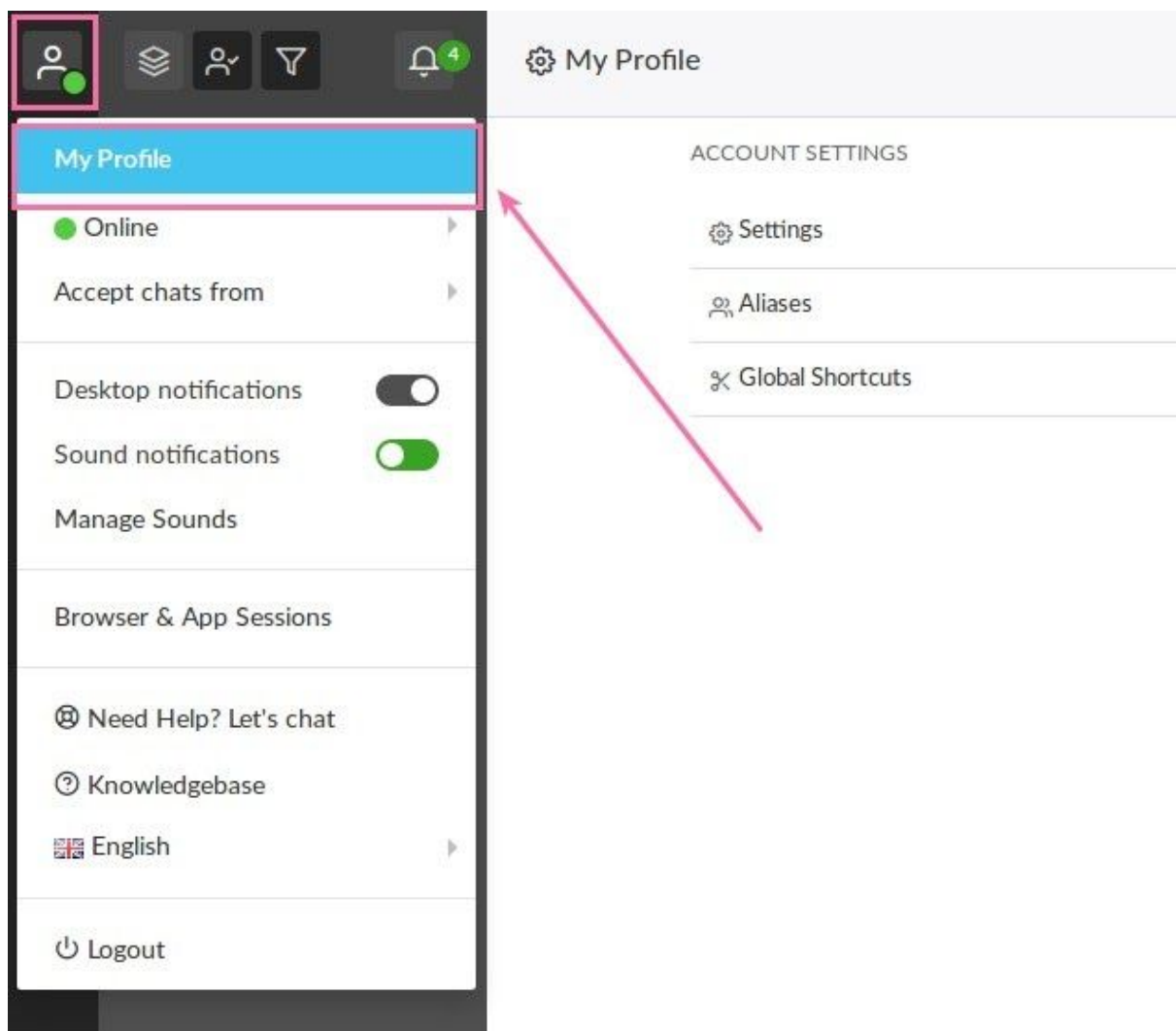
You can edit the **Page Content**, **Widget Settings**, **Widget Appearance**, **Widget Content**, **Page Shortcuts** and **Ban List** here. You can edit the **URL** to your **Profile Page** by clicking the **Pencil Icon** to the right of the URL.

Creating and Managing Aliases

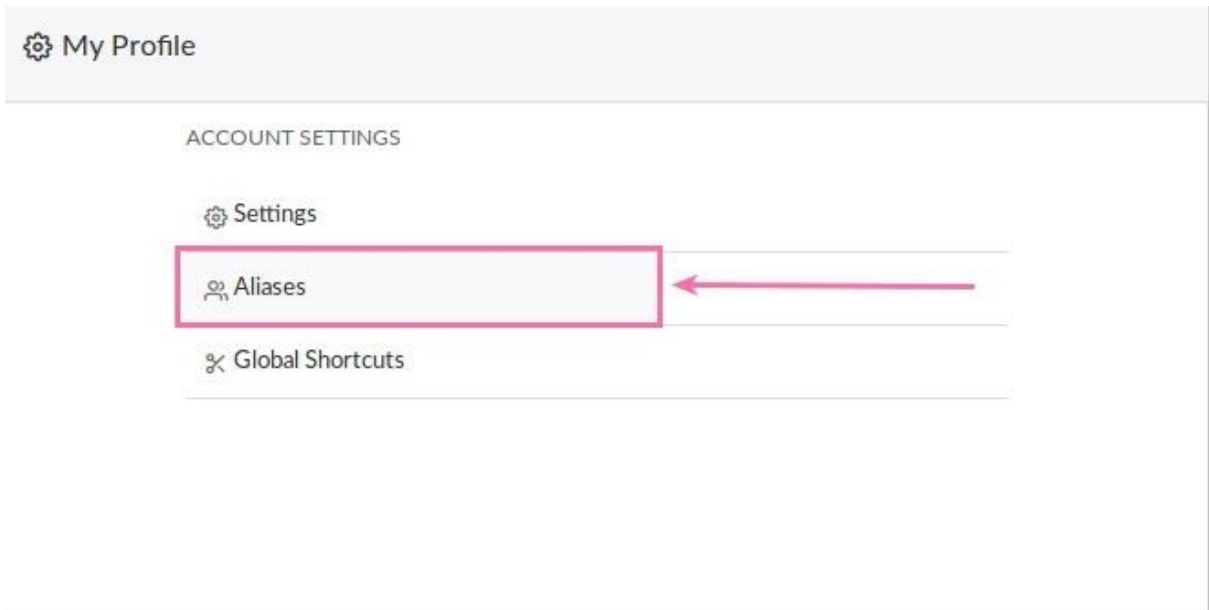
You can have multiple aliases, so you can answer each chat with any name you like. To **Manage Aliases**:

Log-in to Your Dashboard

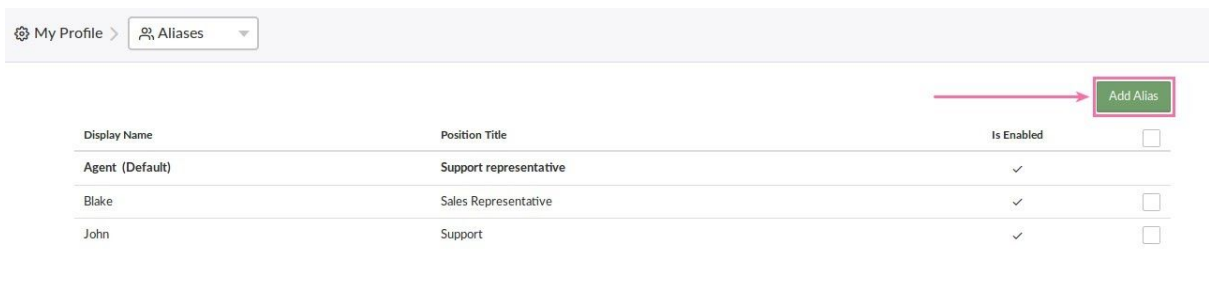
Go to **My Profile** (top left corner of the dashboard)



Go to **Aliases** under **Account Settings**.



You can edit an already existing Alias by clicking on it in the list of existing Aliases or you can create a new Alias by clicking the green “Add Alias” button in the top right corner. To Delete an Alias check the box to the right of the Alias you want to Delete and then press the delete button that will appear.




Adding an Alias Image to the Chat Widget

When you answer a chat using an Alias you can choose to display an image in the widget. To add an image to the chat widget pull down the “Action” Menu to display image settings. Then Upload or Take a Photo.

NOTE: This image will only appear in the widget when an incoming chat is answered using that Alias.

My Profile > Aliases > New Alias

 Action ▾
Upload Photo ←
Take Photo
Select Avatar

Display Name
Enter Display Name

Position Title
Enter Position

Set as default alias

Alias Status :

To answer an incoming chat using an Alias just click on the menu to the left of the **Join** button and Select the Alias you want to use. Then click **Join**. You can **set any Aliases to be the Default Alias** that will be pre-selected for you.

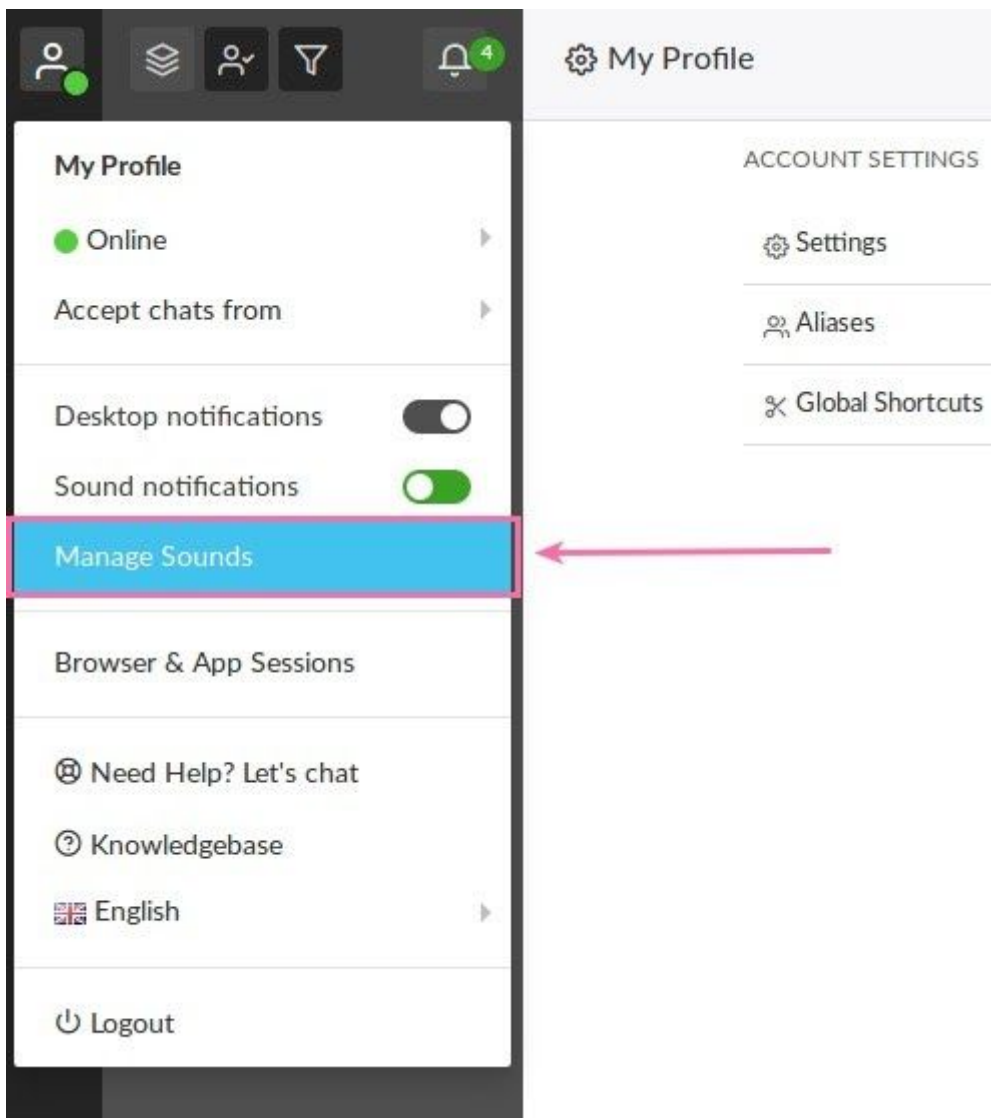
Agent
Blake
John

Agent  

Managing Sound Settings


To Change the Sounds that you hear in the Dashboard, Follow These Steps:

1. Go to the **Top Right of the Dashboard** and click on the Settings Icon. (Gear Icon)
2. Go to **Manage Sounds**.















3. Choose the Sound you would like to use for each Action.
4. Set the Volume Level and how many times you would like that Sound Repeated

5. Click Save

 **Manage Sounds**

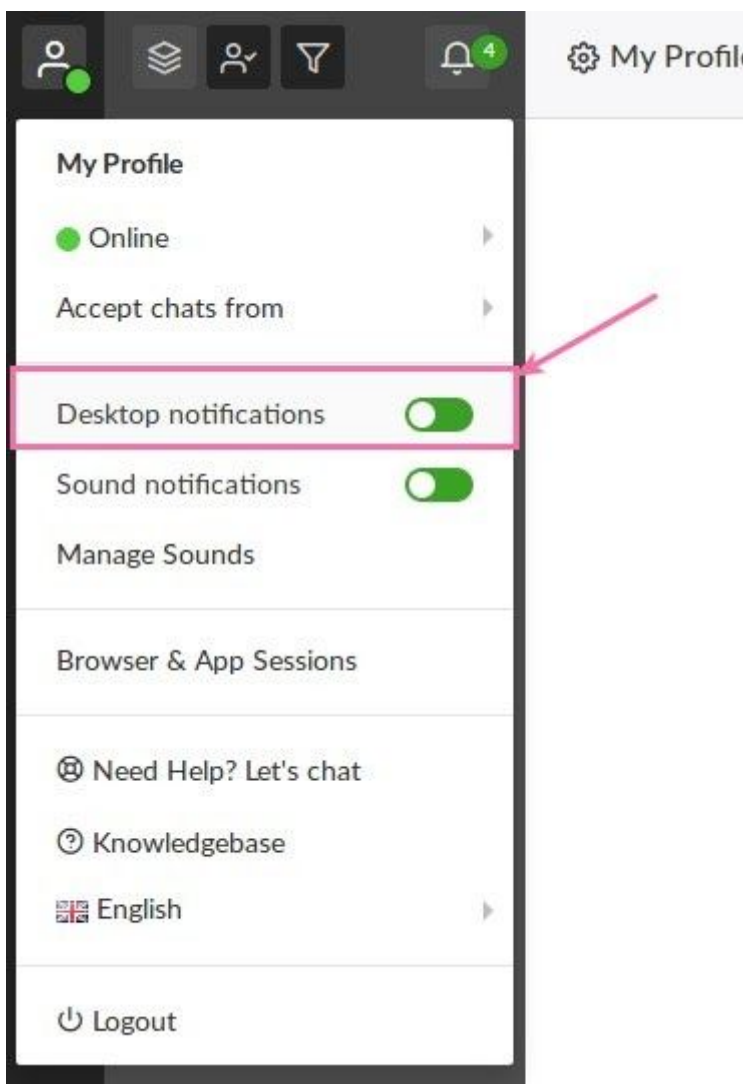
Sound Status: Enabled Disabled

| | | |
|------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------|
| New Chat : Cellphone Ring |    | Repeat : 5 times |
| New Visitor : None | | |
| New Message : High Marim... |    | |
| Agent Disconnect : Beeps |    | |
| New Agent Message : Marim... |    | |

Enabling Desktop Notifications

You can **Enable Desktop Notifications** that will appear even if your web browser is minimized. Follow these Steps:

1. Go to the **Top Left** of the Dashboard and click on the **My Profile Icon**.
2. Switch Desktop Notifications **On or Off**.



Banning a Visitor

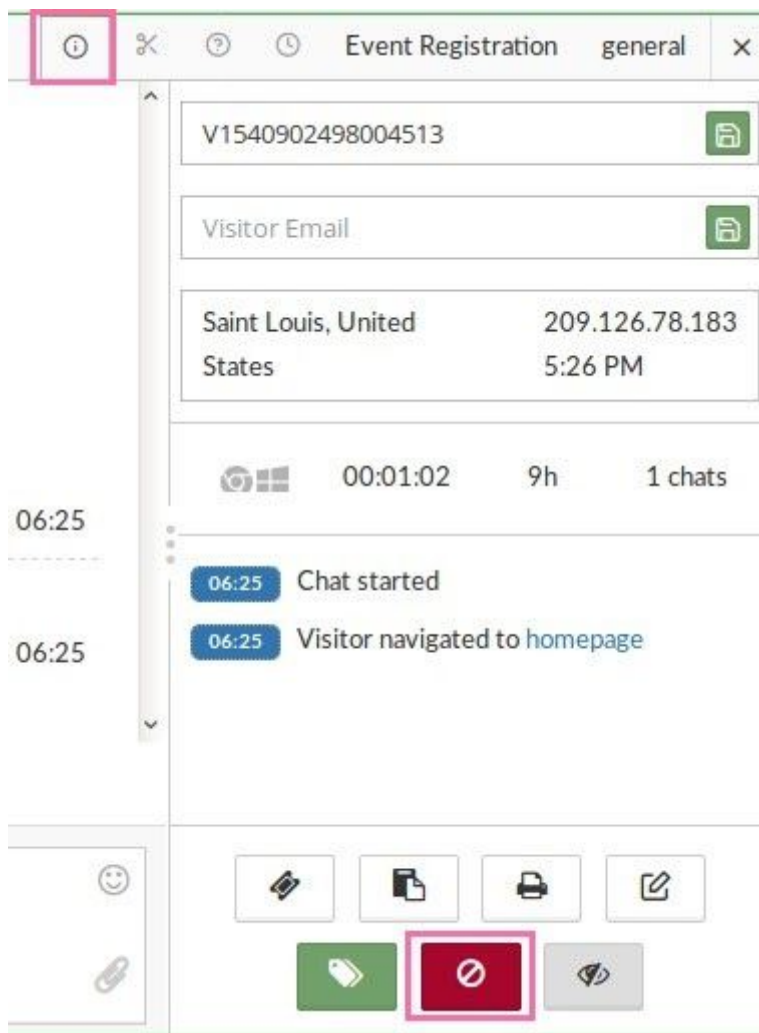
Banning or Un-Banning a Visitor

If you have a visitor that you need to Ban from using the chat widget you can do so following these instructions. This Ban only prevents the visitor from using the chat widget. It does not ban them from your website.

If you are in an active chat:

1. Go to the **Options** menu in the **top right corner** of the chat window. Click **Details** to bring up the **Details Pane** if it's not already open.

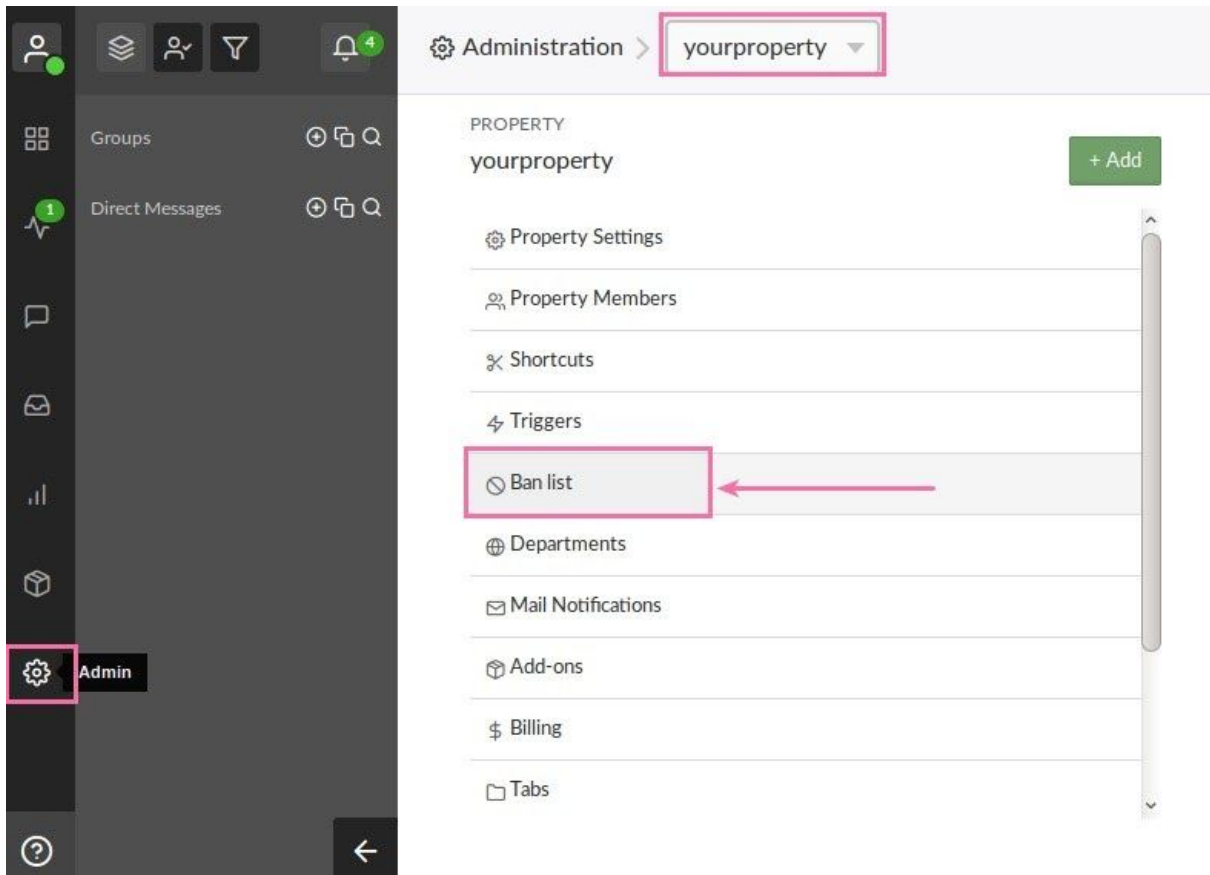
2. Click **Ban Visitor**. Provide a reason for Banning the Visitor.



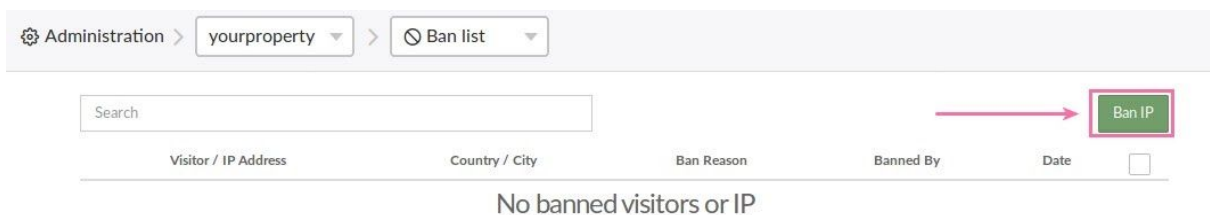
3. You can choose to Ban the visitor by IP address by selecting the Ban IP box. (If you do not Ban the IP the visitor will be able to clear the cookies in their browser and return)

If you are not in an active chat:

Go to the **Top of the Dashboard** and click on **Admin**. Then under **Property settings** click **Ban List**.



You will see a **Green button that says Ban IP** at the **Top Right** of that screen. You can enter the IP address for that visitor and create the ban.



To **Remove a Banned Visitor** from the Banned Visitor list click the **empty box to the right of that visitor**. A **Delete Button** will appear. Click the **Delete Button** to remove the ban.

Disabling your Account

To disable your account please follow these instructions :

1. Please send an email to **support@tawk.to** from your account email address, requesting account deletion.
2. We will reply to confirm you would like the account deleted, and for all your chat history to be removed.
3. Upon reply, your account will be deleted within 24 hours.

This process is in place to ensure your account has not been compromised, and that sensitive data does not get deleted by mistake.