



LiveChat

User Guide

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Introduction

Welcome to the LiveChat platform user guide from Taqnyat. This guide provides comprehensive instructions on how to use the platform clearly.

Whether you are a customer service representative or a supervisor, you will find everything you need in this guide to get started confidently and make the most of the platform's features.

Target Audience



**Supervisors and
Team Leads**

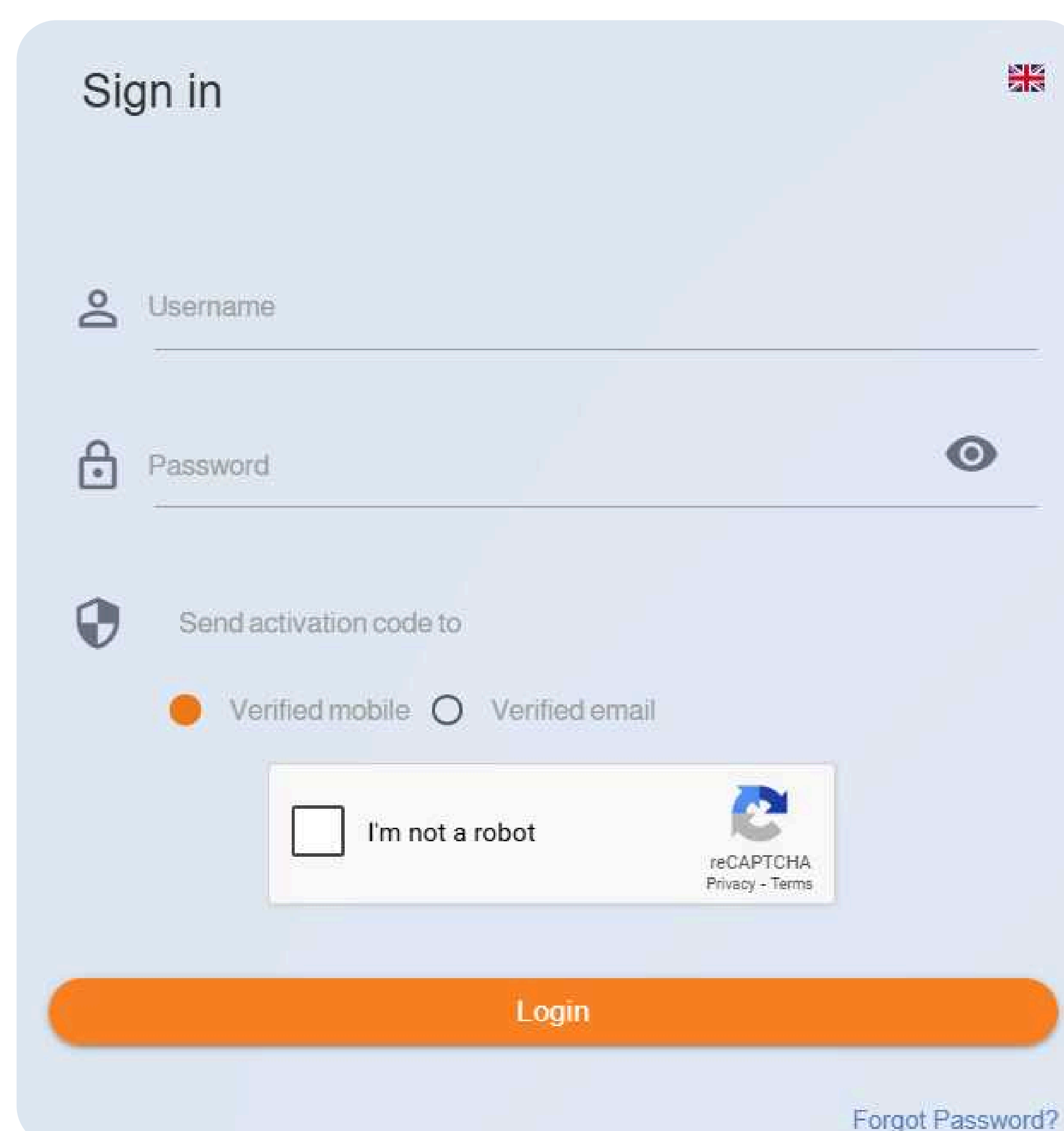


**Customer
Support Agents**

Logging into the LiveChat Platform

Logging into Your Account on the LiveChat Platform

1. Access the LiveChat Platform, using this link: <https://livechat.taqnyat.sa>

The image shows a 'Sign in' form for the LiveChat platform. At the top left is the text 'Sign in' and at the top right is a small UK flag icon. Below this are two input fields: 'Username' with a person icon and 'Password' with a lock icon and an eye icon for toggling visibility. Under the password field is a section for 'Send activation code to' with two radio buttons: 'Verified mobile' (selected) and 'Verified email'. Below this is a reCAPTCHA widget with a checkbox labeled 'I'm not a robot' and a 'reCAPTCHA' logo with links for 'Privacy' and 'Terms'. At the bottom of the form is a large orange 'Login' button. In the bottom right corner, there is a link that says 'Forgot Password?'.

2 – Enter the username for the main account: This is the LiveChat account username assigned by the account creator.,you should include an "@" symbol followed by the main account name, which is the primary account for the organization in Taqnyat (the one with WhatsApp service activated).

3 – Enter the password: This is the password for the LiveChat account, initially set by the account creator for the first login. You can change this later through the settings.

4 – Solve the Security Puzzle: A security puzzle will appear to protect your account. If you fail to solve it correctly, the following error will appear:

! An error in the verification process

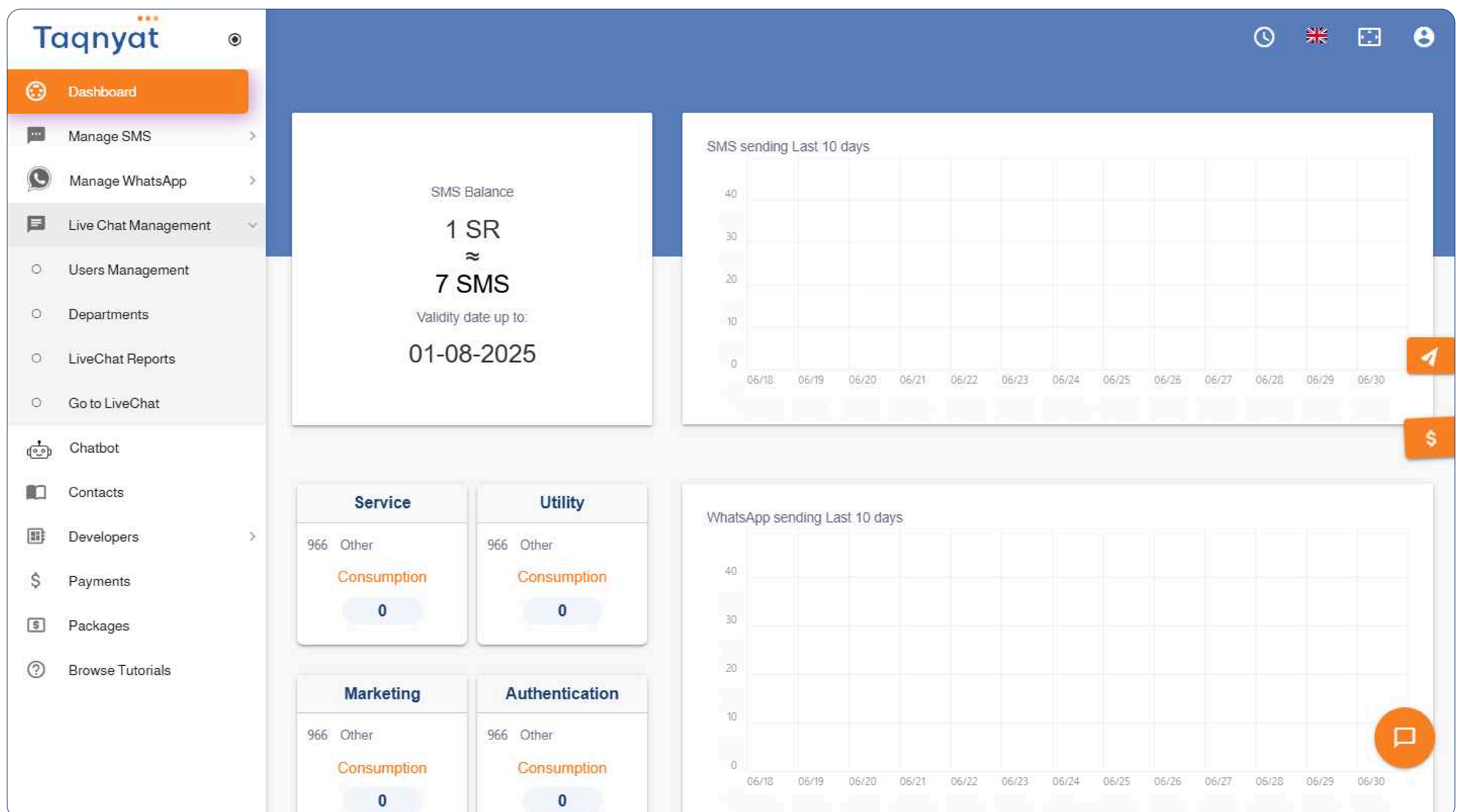
If you encounter this error, refresh the page and try again.

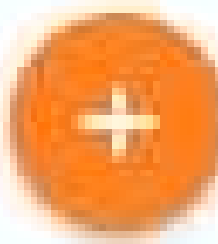
5 – To complete the login, enter the four-digit OTP (One-Time Password) sent to your registered email or phone number, which was set up by the account creator.

Logging into the LiveChat Platform

Create a New User Account

- 1- Log in to your main account on the Taqnyat platform at <https://portal.taqnyat.sa>, which has been pre-configured by the provider.
- 2- Enter the four-digit verification code sent to your mobile phone, then click "Login."
- 3- From the menu listed on the right, navigate to "LiveChat Management" and then to "User Management."



- 4- Click on the  button located in the top-right corner of the screen to display the following fields:

Logging into the LiveChat Platform

Creat a New User Account

Field Details	
Username	add the usernam, which will be used to log into the account. It must be in English letters and not previously used (e.g., ahmed_support).
Password	Add the password for the user account you wish to create. It must be strong, consisting of 8 characters, and include at least one number, one uppercase letter, and a special character such as &.
Full Name	This is the username you want to add, which will not be visible to the client. It can be used by the account creator to distinguish between accounts (e.g., Ahmed Mohamed).
Phone Number	The user's phone number you want to add, configured to receive the OTP code upon login.
Email	This is the user's email you want to add, where notifications and verification codes for account login will be sent.

Logging into the LiveChat Platform

Creat a New User Account

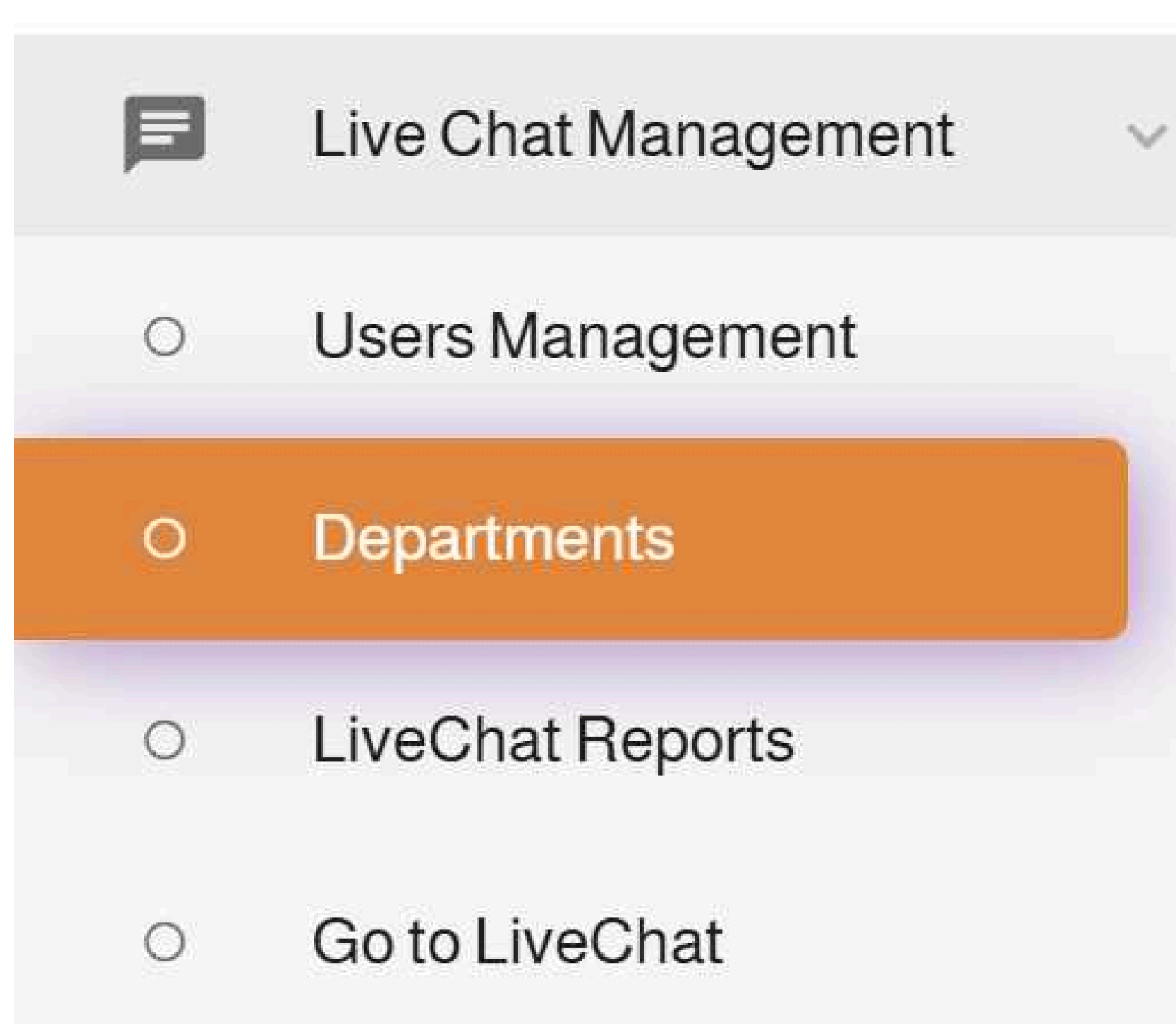
Field Details	
Department	This refers to the department the account holder belongs to which have several departments available, and you can modify them from the "Departments" tab.
Supervisor	If you choose "Yes", the user you are adding will have access to the archive, contacts , and settings modification. If you choose "No", the user will only be able to manage chats and quick replies. You can also assign archive permissions to the user as needed.
Account Status	Active: To activate the account. Inactive: To deactivate the account.
Chat Archive	It contains multiple options, including: Hide Conversation Archive View Conversations Transferred to Employee View Conversations Related to Their Department View All Conversations
Start Message (Optional)	This is a message automatically sent to the end user (client) after receiving the chat from the LiveChat account. Example: "Hello, this is Ahmed from the Taqnyat support team. How can I assist you today?"

Adding and Editing Functional Departments

6– After filling in all the previous fields, click on the "Add" button (add icon) to save the entered account information.

From the main page of the platform portal.taqnyat.sa, the main account holder on the Taqnyat platform can manage the departments within the platform by adding multiple new departments such as: Technical Support, Sales, Accounting, etc. Additionally, they can modify or delete department names when necessary by following these steps:

1. Select the "Departments" tab from the sidebar menu.



2. From the top left of the screen, select one of the functional buttons.



A button to add a new department.



Edit a specific department after selecting it from the table.



Update the list to display the latest changes.

3. You can navigate between department lists using the navigation buttons at the bottom of the table.

Exporting the Chat Report

From the main page of the platform portal.taqnyat.sa, the main account holder on the Taqnyat platform can generate a detailed report of all chats that took place through the platform within a specified time frame., this helps in analyzing customer interaction volume and measuring team performance.

Select the period to export

From Date

To Date

Export 

Page Components:

Element	Description
From Date	The beginning date of the period you want to include in the report.
To Date	The ending date of the period for the report.
Export Button	After selecting the time period, click the "Export" button to generate an Excel report containing the chat data that occurred within the specified period.

Exporting the Chat Report

Exported Report Contents

The Excel report exported from the platform includes three main categories:

1. Conversation Statistics

- Number of chatbot and live agent conversations.
- Number of transfers between agents and conversations ended due to disconnection.
- Average and maximum handling time for conversations.
- Average and maximum customer wait time.

2. Availability Logs

- Employee name, login and logout times.
- Connected and disconnected periods.
- Available work time and break durations.

3. Hourly Activity

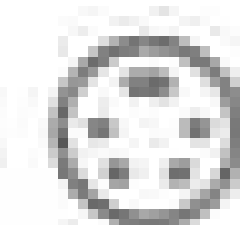
- Number of conversations handled by each agent during every working hour.

Components of the Live Chat Platform

Upon logging into your LiveChat account, the main platform screen will appear with a sidebar on the right containing the following pages.

Below is a brief description of each page:

This panel appears for accounts with supervisor privileges the page provides an overview of the total messages and ratings received by the account. It allows filtering the data based on the specified time period.



Dashboard

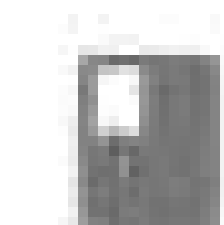
This panel appears for accounts with supervisor privileges this interface includes a contact list, allowing you to manage the lists. It also displays the end customer's name when receiving any chat from them. Additionally, you can export the added information into an Excel file.



Contacts

The quick reply interface is available for all account types.

It includes a set of quick messages that the employee can use within the conversation, with the ability to manage them within the interface, and each user has their own quick replies.



Fast Response

Components of the Live Chat Platform

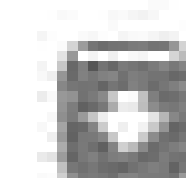
The conversations interface is available for all account types.

It displays all ongoing conversations, whether with employees or with the chatbot, and provides options that allow the employee to manage conversations and start new ones using pre-existing templates.



Chat

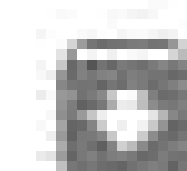
This interface appears for accounts that have it enabled, and it allows viewing all conversations that are automatically archived when the session ends.



Archives

This interface is available for accounts with supervisor privileges.

It allows chatbot subscribers to export the data of customers who communicated via WhatsApp as an Excel file containing phone numbers along with variables defined by the user as needed (in the bot scenario), such as the customer's name or the date of communication.



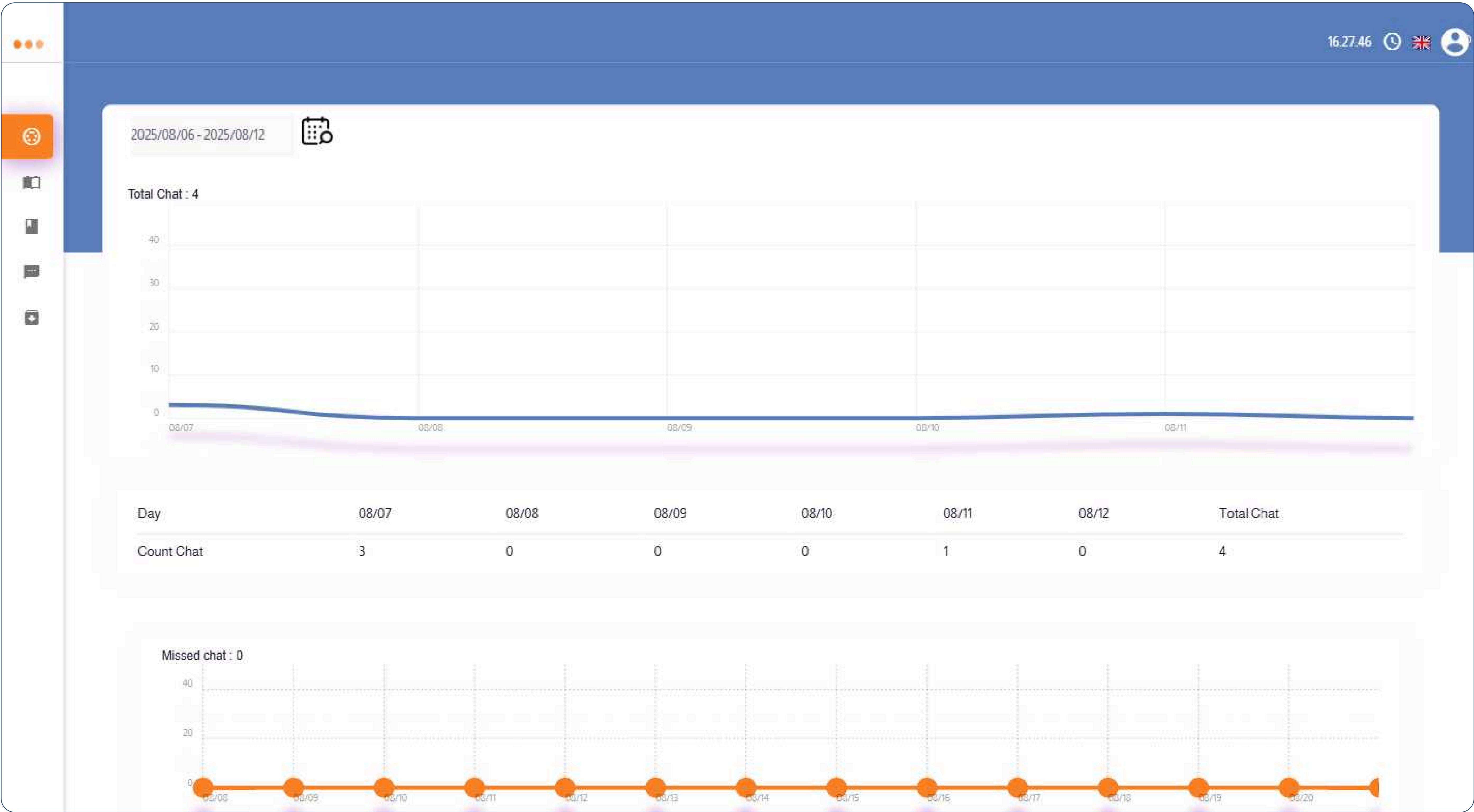
Whatsapp Report

Components of the Live Chat Platform

Main Dashboard Interface

Main Dashboard Interface include:

- 1. A chart showing the total number of conversations that took place during different time periods, followed by a detailed table containing the same data, providing a clearer and more accurate analysis of interaction volume across the platform.
- 2. A chart illustrating the Service Level Agreement (SLA), showing the number of conversations lost during the specified days. This chart helps understand the level of service provided and the extent of compliance with standards related to the number of lost conversations. Below the chart, there is a table presenting the same information in detail.
- 3. Information about customer satisfaction derived from ratings collected after the employee assists the customer and ends the conversation. The customer is shown a message containing star ratings for the service. These data are displayed only for those who have activated this service through the provider.

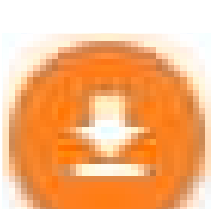


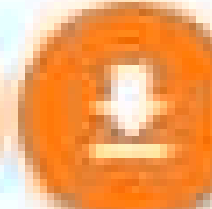
4- At the top left of the screen, there is a date selection button to specify the time range for which you want to display the data.

Components of the Live Chat Platform

Contacts Interface

Control Buttons

-  Used to add a new number, When clicking the button, fields open to be filled in, including the mobile number, name, and others.
-  Used to import numbers by uploading an Excel file, you can use the provided example to fill in the file in the same format.
-  Used to edit the details of a number after selecting it.
-  Used to delete a number after selecting it.
-  Used to synchronize numbers and update the displayed list.
-  Used to search for a specific number.
-  Used to export the selected numbers to an Excel file.

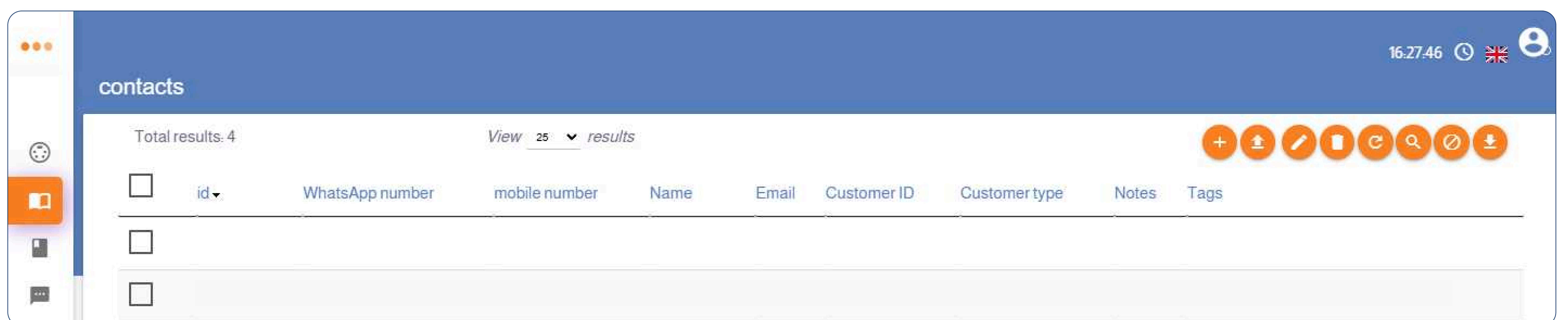


Customer ID	Customer type	Notes	Tags
		test	vip,vip
			vip,zeyda
			'undefined',

Components of the Live Chat Platform

Contacts Interface

Main Fields:



- **WhatsApp Number**

Required Field

The number linked to the customer's WhatsApp account, used for communicating with them through Live Chat.

- **Mobile Number**

Optional Field

The customer's primary phone number, used in case other communication channels are available.

- **Name**

Optional Field

The customer's name as exported from the contact lists (Excel) or as manually entered by the employee.

- **Email Address**

Optional Field

The customer's email address, if available, to facilitate communication or follow-up.

Components of the Live Chat Platform

Contacts Interface

- **Customer ID Number**

Optional Field

A unique number used to identify the customer within the system, automatically assigned by the system.

- **Customer Type**

Optional Field

This field is used to categorize the customer as appropriate, and users can define classification categories such as: Individual, Company, Distributor, Partner, etc.

- **Notes**

Optional Field

An open field for writing any additional details or information about the customer, such as their preferences or any points that should be taken into consideration.

- **Tags**

Optional Field

Used to classify or tag customers based on specific labels (in English). These can be added during the conversation or through the interface and used to search for customers in the Conversations interface and the Archive interface.

Example: Vip, complaint, ignore.

Components of the Live Chat Platform

Fast Response Interface

- Quick replies are pre-defined text templates used by agents during conversations to improve and speed up the customer service experience. This page allows you to add new replies, edit existing ones, or delete them.
- To use quick replies during a conversation on the "Chat" page, the agent can click the book icon



you can select the title of the saved quick reply from the "Quick Replies" page then the associated message will automatically appear in the input field, eliminating the need to type it manually.

- To add a new quick reply, click the + button. You can then enter a title and the corresponding message content.
- All added quick replies appear as small cards (or tickets) on the page. Each card includes options to edit or delete the reply for easy management.

Components of the Live Chat Platform

Chats Interface

The first section of the page contains a list of conversations with additional detailed options as follows

A list of conversations that have been assigned to employees and have been started, along with their count.

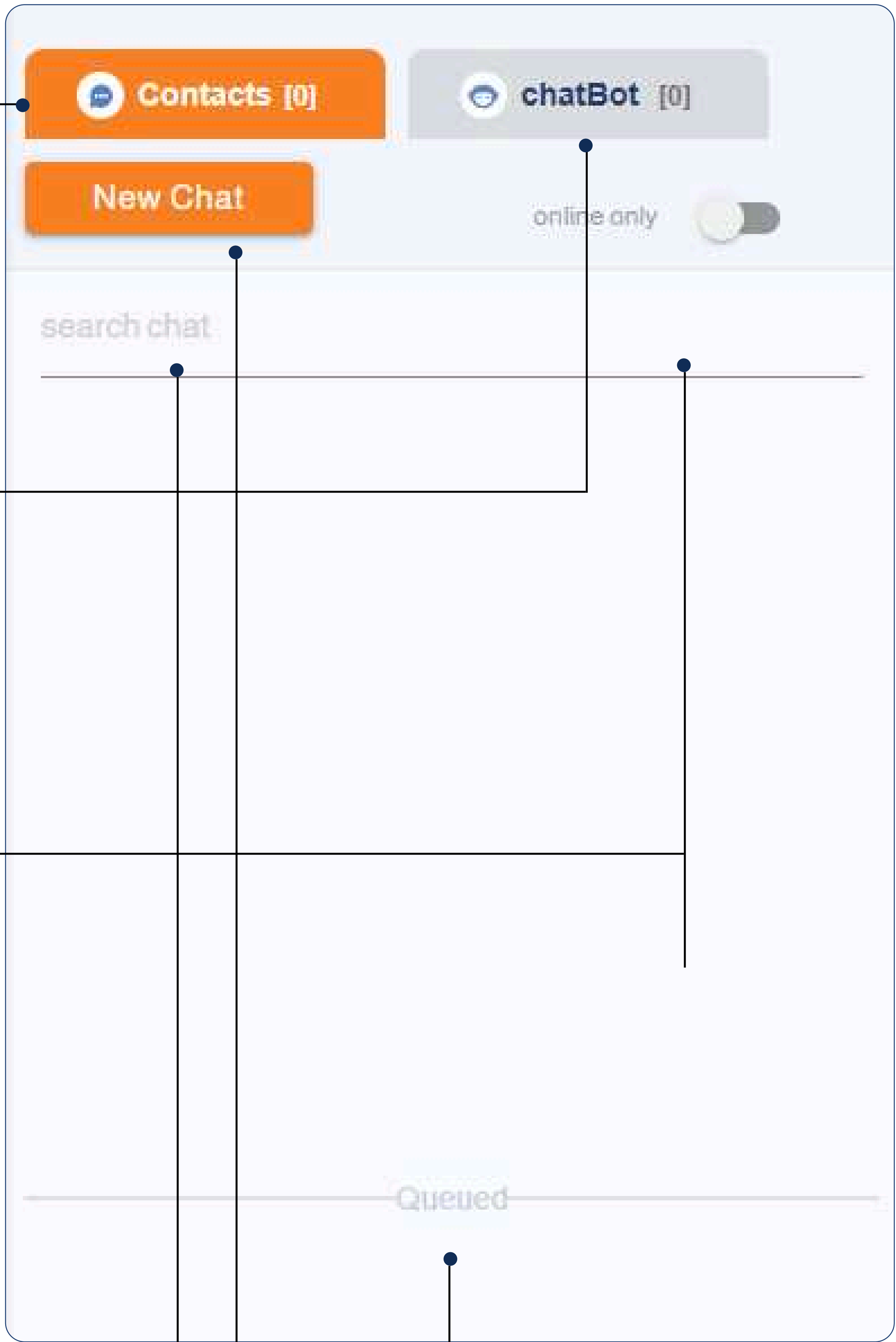
This list displays the conversations currently active with the chatbot, along with their count.

When the button is activated, it will display conversations that have had activity in the last 5 minutes and hide the rest.

Clicking the button opens a screen to choose a message template and enter the recipient's phone number. If no session is open with the number, the conversation will appear only after the recipient replies.

You can search for a specific conversation by entering the phone number with the country code.

The dividing line between conversations assigned to the employee and conversations in the queue that have not yet been accepted by any employee.



Note: After 24 hours, the conversation will be automatically moved to the Archive page.

Components of the Live Chat Platform

Chats Interface

After opening the conversation, the following icons will appear:



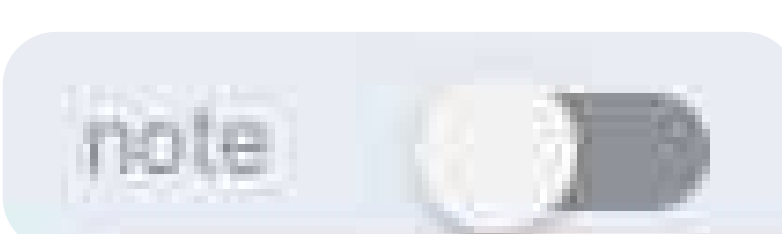
Clicking this icon will display the customer's information list, which can be edited or updated (such as adding a name to the contacting number or adding distinctive tags).



Close the conversation after selecting the closure reason.



Used to transfer the conversation to another employee or department, with currently available employees indicated by a green mark next to their names.



When this button is activated, the user can add internal notes to the conversation that are visible only to the person the conversation is transferred to.



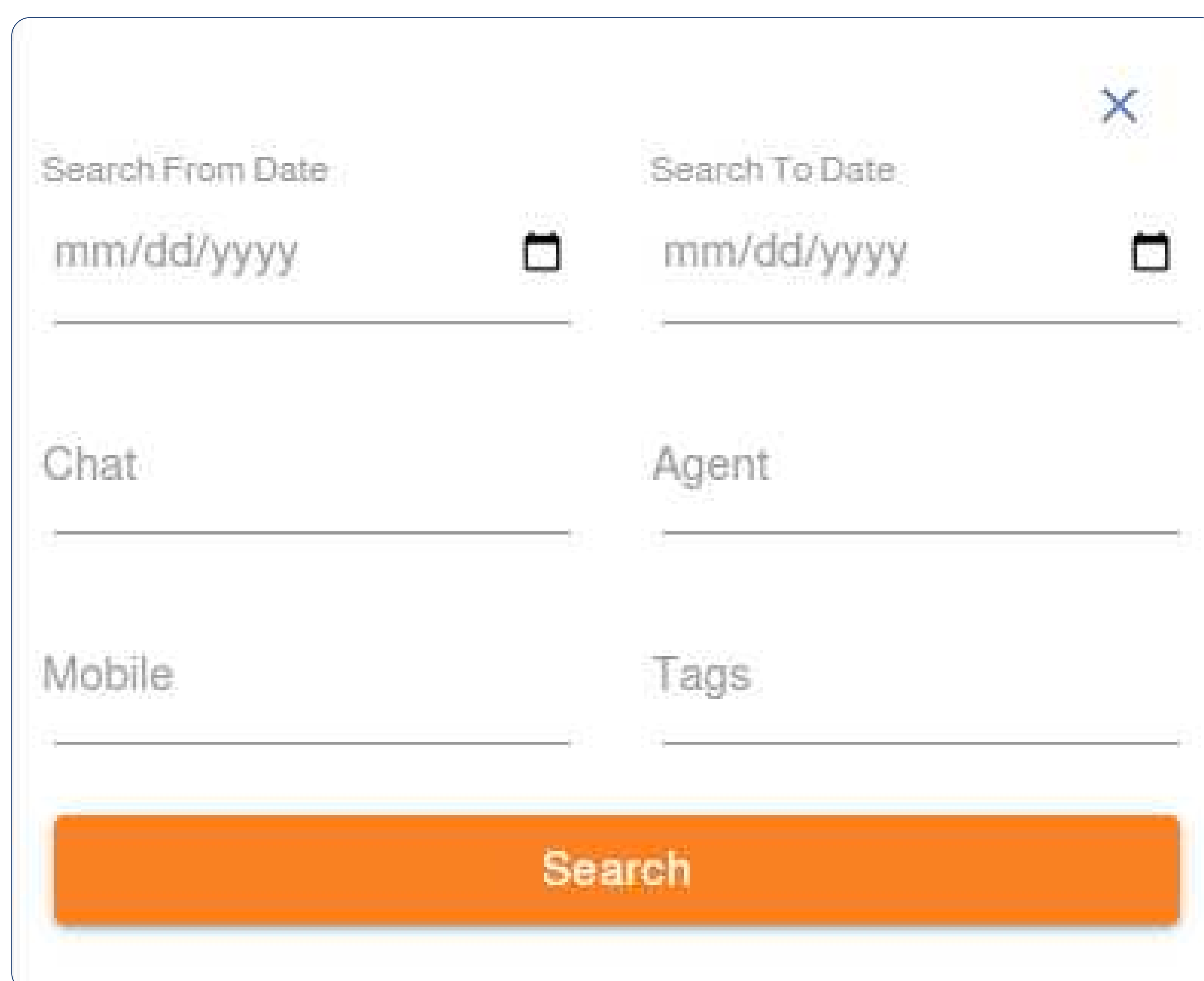
The following sidebar contains several buttons: the first allows attaching files and media, the second allows using emojis, the third adds tags to the customer, and the fourth enables the use of the employee's previously added quick replies.

Components of the Live Chat Platform

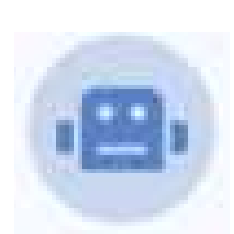
Archive interface

All conversations are archived when the session ends and can be viewed from the Archive list within accounts that have admin privileges.

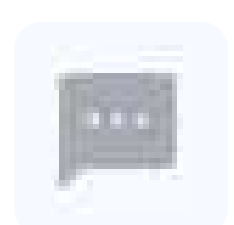
You can search for conversations by clicking the filter icon and selecting the desired search criterion (for example: date or employee 🗑 name)

A screenshot of a search interface for archived conversations. It features a white modal box with a close button (X) in the top right corner. Inside, there are four search criteria: 'Search From Date' and 'Search To Date' at the top, each with a date input field showing 'mm/dd/yyyy' and a calendar icon. Below these are 'Chat' and 'Agent' with dropdown menus. At the bottom are 'Mobile' and 'Tags' with dropdown menus. A large orange 'Search' button is positioned at the bottom center of the modal.

- After the search, a list of the found conversations will appear, with the following icons next to each conversation:



To display previous conversations between the customer and the bot.



To display previous conversations between the customer and the employee.



To send a template message to the customer if you wish to contact them again; the conversation can be reopened after they reply.

Components of the Live Chat Platform

WhatsApp Report

When the chatbot service is enabled, it can be configured to collect certain information from customers within a set of variables (such as their names, interests, email addresses, and more), which can be generated in reports for a specified time period.

Steps to Export a File:

1. Select the start date of the period
2. Select the end date of the period
3. Choose the required variables, based on the variable names used in the WhatsApp chatbot scenario
4. Click the Export button

An Excel report will be generated containing:

- The variable name
- The collected value
- The phone number from which the value was gathered
- The date of communication

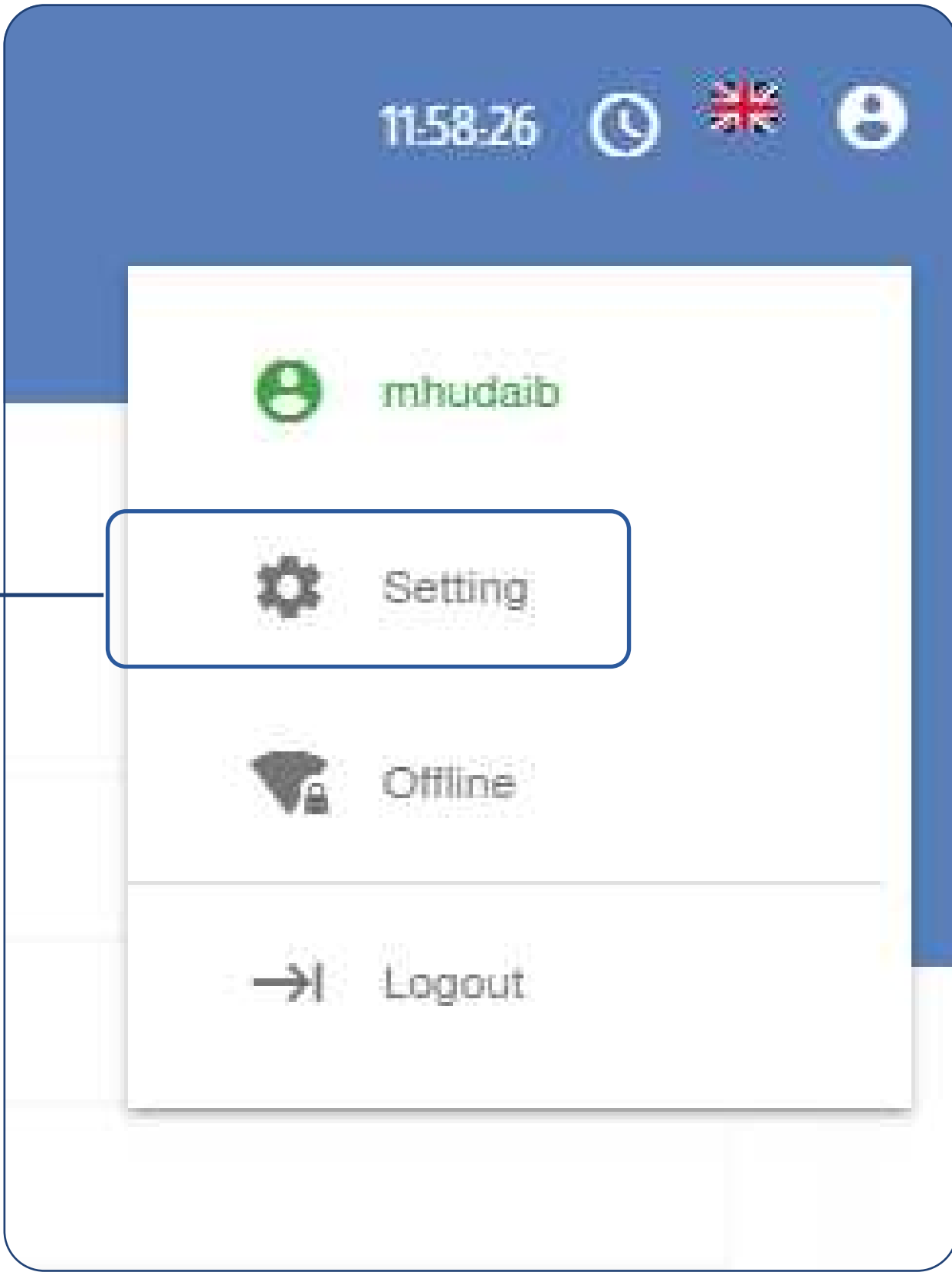


The screenshot shows a web application interface for exporting WhatsApp leads. The title bar at the top of the form is 'Export Whatsapp Lead'. The form contains three input fields: 'Date From' with a calendar icon and 'mm/dd/yyyy' placeholder, 'Date To' with a calendar icon and 'mm/dd/yyyy' placeholder, and 'select variable' with a dropdown arrow icon. An orange 'Export' button with a right-pointing arrow is located at the bottom right of the form. A sidebar on the left contains several icons, with the bottom-most icon (a shopping bag) highlighted in orange.

Components of the Live Chat Platform

Settings Interface

You can access the settings interface by clicking the personal account icon at the top left of the page, then selecting “Settings” from the dropdown menu.



Personal Settings

Full name

Password

Contact number

Email

Number of customers in the list

Start message

Chat assignment

☐ Auto ☒ Manual ☐ Directed

Log out when IP changes

☒ Enabled ☐ Disabled

Customer order in the list

☐ Customer with the latest reply on top ☒ By conversation start time

Edit

Components of the Live Chat Platform

Settings Interface

Field Details:

- **Full Name:**

This is the registered username used to distinguish between accounts, and it can be modified as needed.

- **Password:**

Used to update the user's account login password.

- **Contact Mobile Number:**

The user's phone number, configured to receive the One-Time Password (OTP) during login to ensure security.

- **Email Address:**

The official email address linked to the account, used for correspondence, notifications, and One-Time Passwords (OTP).

- **Number of Clients in the List:**

The maximum number of customers that can be displayed in the user's conversations or contacts list.

- **Start Message:**

An automatic welcome message sent to the customer at the beginning of the conversation, such as: "How can I help you?"

Components of the Live Chat Platform

Settings Interface

- **Conversation Assignment Mode:**

Defines how conversations are assigned between employees:

Automatic: New conversations are assigned automatically to online (logged-in) employees.

Manual: Conversations stay in the queue until opened and replied to by the employee.

Directed: When the directed setting is activated, responses to campaigns are routed to a specific employee pre-assigned to handle them. Additionally, chatbot conversations are automatically directed to the designated department or employee according to the bot's scenario. Users can also manually transfer conversations from the queue to the chat inbox.

- **Logout on Device Change:**

Enables or disables automatic logout when logging in from a different device (with a different IP address).

1. Enabled: The user is automatically logged out from the previous device upon login from a new one (different IP).

2. Disabled: The user remains logged in on all devices until logging out manually.

- **Client List Sorting:**

Defines how clients are ordered in the user interface

1. Clients with the most recent reply appear at the top.
2. Based on the time the conversation started.

We're Here for You

At Taqnyat, we are committed to continuously improving our platform and addressing any issues our valued customers may face with the highest speed and efficiency.

Your trust in us is greatly appreciated, and we are dedicated to providing a user experience that meets your aspirations and exceeds your expectations.

Thank you for choosing Taqnyat. We are always delighted to be your trusted technology partner



Technical Support Team

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