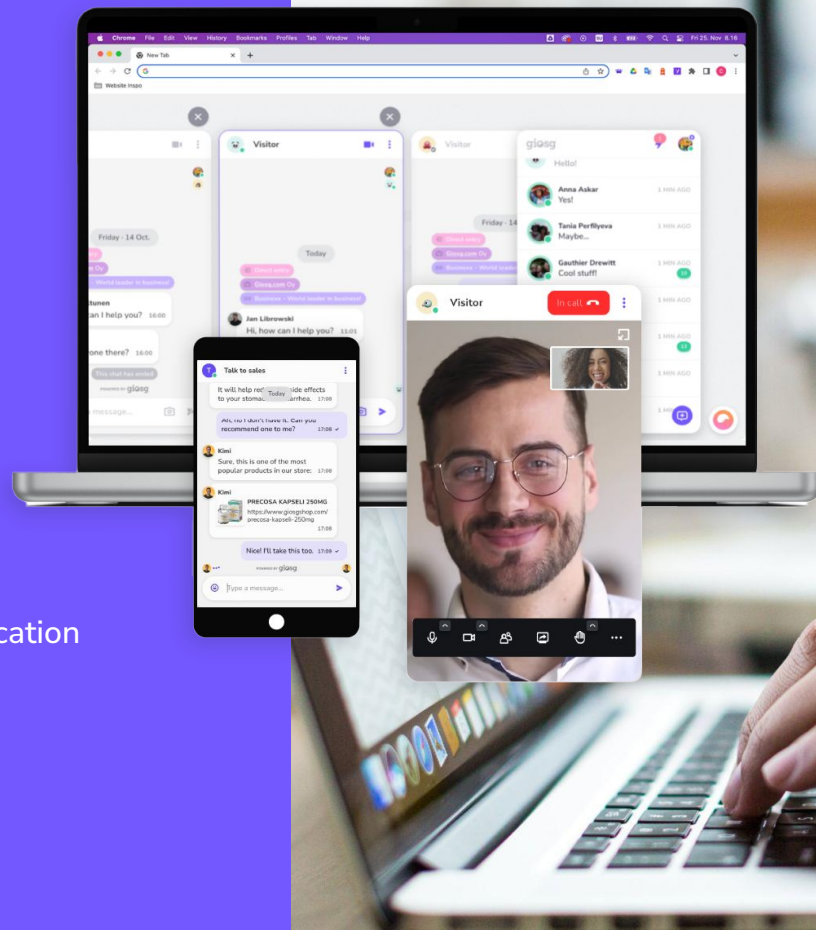




Giosg guide for agents

All you need to know about using giosg Live as a communication channel in your daily work.



Content

- 1 [Best practices](#)
- 2 [giosg Live for agents](#)
- 3 [Chatting](#)
- 4 [Video calls](#)
- 5 [Phone calls](#)
- 6 [Mobile app](#)
- 7 [Chrome extension](#)

1

Best practices

1.1 Tips for Chatting

1.2 Tips for Video calls



1 Best practices

1.1

Tips for chatting

React quickly to new conversations

Serve with the right style

Be proactive

1 Best practices

Tips for chatting: **React quickly to new conversations**

We've seen how important it is to respond to your customer's questions immediately, especially their initial message. Greet the customer and react to their messages right away.

→ React immediately to incoming messages

- Use sound effects or desktop notifications.
- Let the customer know you're there by greeting them immediately.

→ Quick replies

- Split your answer in shorter sections to keep up a nice flow.
- Keep the customer updated on what will happen next.
- Ask for the customer's contact information if you can't answer their questions right away.

→ Useful tools for increased efficiency

- Collect frequently asked questions to Canned Answers s or use AI reply suggestions.
- Share links for additional information.

1 Best practices

Tips for chatting: **Serve with the right style**

- **Personalise the service**
Use your own name and picture.
- **Be courteous**
Remember to greet and thank your customers!
- **Pay attention to your spelling**
The accuracy of your communication represents both yourself and your company. You can use your browser's spell checking to help you with this.
- **What is the right communication style?**
Consider your company's brand, field of business, and the customer's communication style when choosing the appropriate way to convey your message.

I start with formal communication style, but of course I vary it based on the visitor. I have learned to monitor what kind of communication style the customer uses. Adjusting your communication style makes the customer feel welcome.

1 Best practices

Tips for chatting: Be proactive

→ Regular online presence

Remember to change your status to **Online** when your available and **Offline** when you leave.

→ Be active

- Offer help actively.
- Provide additional information.
- Inform your visitors about campaigns.

→ Think about the end goal of the conversation

- Steer the conversation towards that goal.
- Anticipate and propose next steps.

We have tried to personalize our web store and to 'give it a face.' It's important that we use our own names in the chat. In addition, we also have our own pictures visible to the customers. In the chat, we are the same people with whom the customer could interact elsewhere as well.

1 Best practices

1.2

Tips for video calls

Be professional and keep your goal in mind

1 Best practices

Tips for video calls: **Be professional and keep your goal in mind**

→ Before the call:

- For a professional and pleasant interaction with the visitor, make sure you're not in a noisy environment and that lightning is decent.

→ When the call starts:

- Look into the webcam as you would look at a customer if they were in front of you.
- Make sure the visitor can see and hear you and let them know that you can hear them.
- Mention that the chat conversation is available at the bottom of the screen throughout the call, in case any sound issues would occur.

→ During the call:

- Be courteous and clear in your communication.
- Think about the end goal of the conversation.
 - Steer the conversation towards that goal.
 - Anticipate and propose next steps.

2

giosg Live for agents

- 2.1 Getting started
- 2.2 Using giosg Live



2 giosg Live for Agents

2.1

Getting started

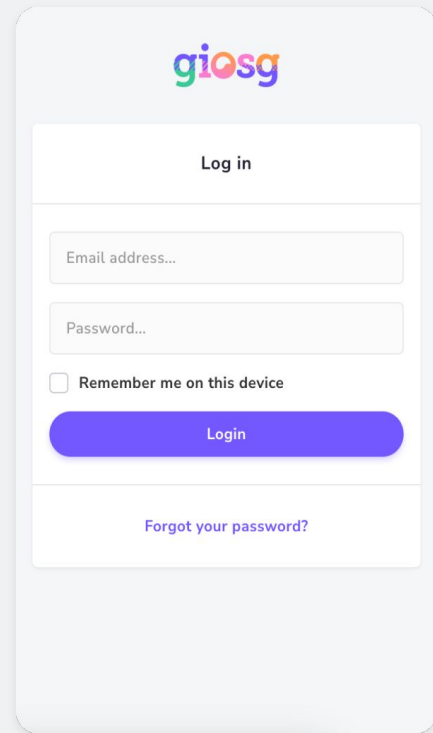
Logging in
Allowing push notifications
Profile settings

2 giosg Live for Agents

Getting started

Logging in

- Head to <https://service.giosg.com/new/>
- Click on the giosg bubble in the bottom right corner of the page
- Log in by using your email address and password



The image shows a mobile app interface for logging in. At the top is the 'giosg' logo. Below it is a white box with the title 'Log in'. Inside this box are two text input fields: 'Email address...' and 'Password...'. Below the password field is a checkbox labeled 'Remember me on this device'. A large blue button with the text 'Login' is positioned below the checkbox. At the bottom of the white box is a link that says 'Forgot your password?'. The entire interface is set against a light gray background.

2 giosg Live for Agents

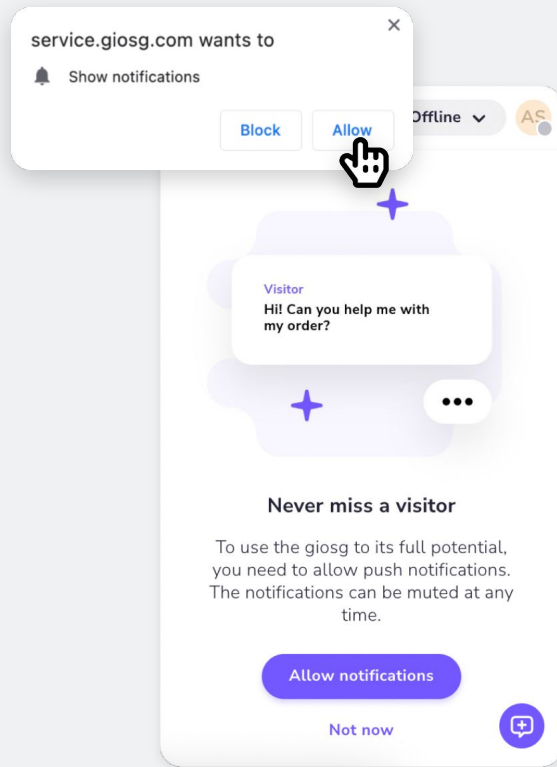
Getting started

Allowing push notifications

When you log in for the first time (or with a new browser), select **Allow push notifications**. Your browser will also request your permission to send you notifications. Select **Allow** here as well.

In giosg, these will notify you about a new task; a new chat, message or call.

We highly recommend allowing notifications, as that helps you to offer a good customer experience by helping you to quickly react to incoming tasks. Also they will be hard to recover if not allowed, especially on the system level.

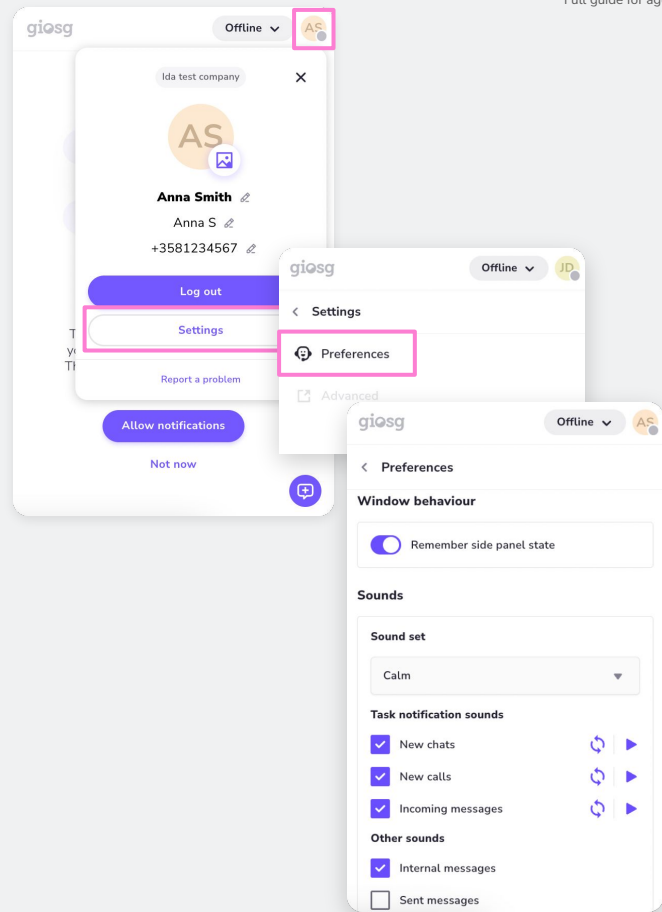


2 giosg Live for Agents

Getting started

Profile settings

- Add an alias name and profile picture to make the chats with your website visitors a bit more personal.
- Edit sound notifications from your profile settings, and choose which sounds you want to use.
We highly recommend allowing at least the sounds for **Pending visitor** and **Incoming messages** as these help you notice new conversations and messages.



2 giosg Live for Agents

2.2

Using giosg Live

Overview

Internal communication

2 giosg Live for Agents

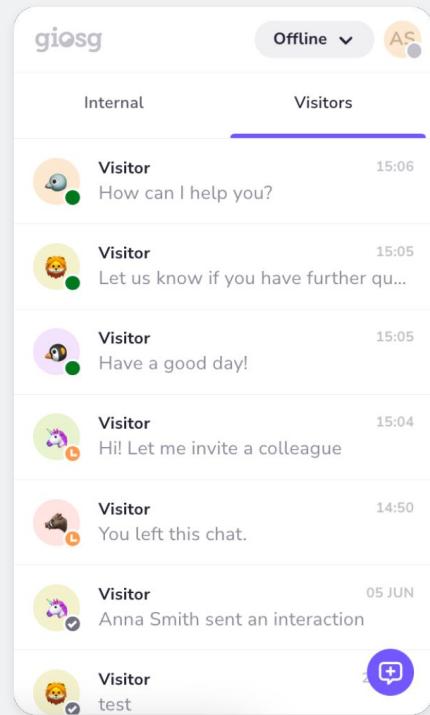
Using giosg Live

Overview

In the **Visitors** tab, you can see a list of chat conversations or calls that you've had with your website visitors.

From the top of the list, you can change your status (offline/online) which affects your availability to website visitors.

By clicking your profile picture at the top right corner you will be able to log out and access your profile settings.

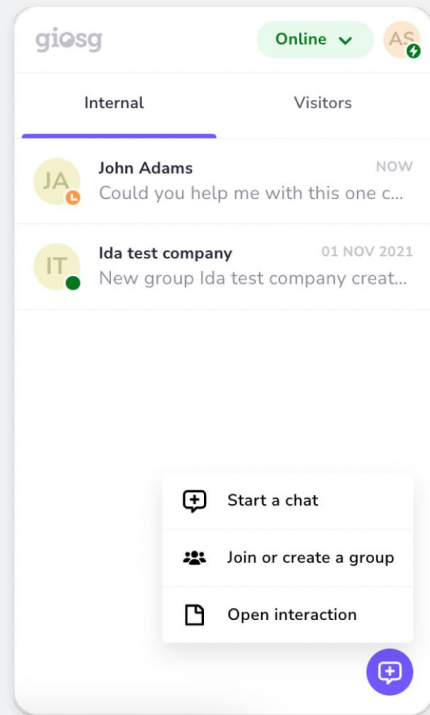


2 giosg Live for Agents

Using giosg Live

Internal communication

In the **Internal tab**, you can start a conversation with a colleague or a group of colleagues. Here, you'll also see all previous internal conversations.



3

Chatting

- 3.1 The basics
- 3.2 Chat features



3 Chatting

3.1.

The basics

Go online and start serving your customers

Additional statuses

Respond to incoming chats

Leaving a chat

Visitor information

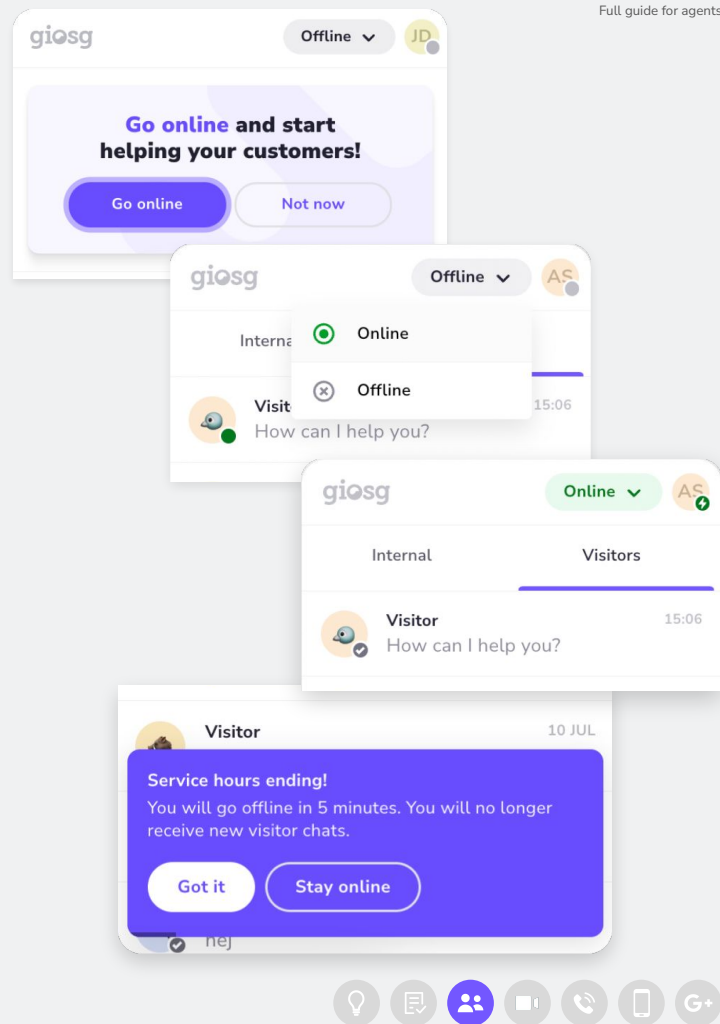
The basics

Go online and start serving your customers

Change your status from **Online** to **Offline** to tell the system that you're available and ready to chat.

- Click **"Online"** when you want to be available for your website visitors and to accept chats.
- When you **can't accept more chats**, change your status to **"Offline"** in the menu.

If your organization is using service hours, the system will remind you to go offline when they're about to end.



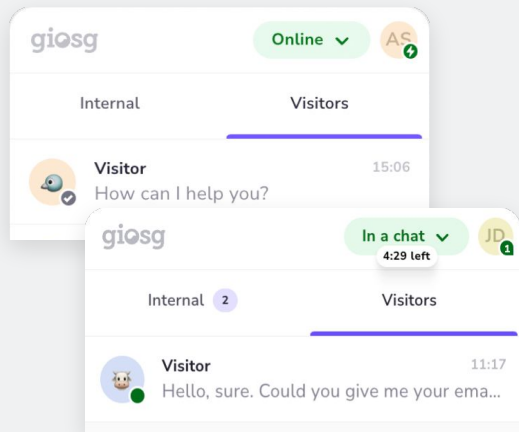
3 Chatting

The basics

Additional statuses

In addition to the Online and Offline statuses, your status can also be set to the following

- “In a Chat” when you have joined a chat
- “In a Call” when you have joined a call
- “Away” if you’ve been away from the giosg tab for 2 minutes. You can still be Online and receive chats.
- “Logged out”



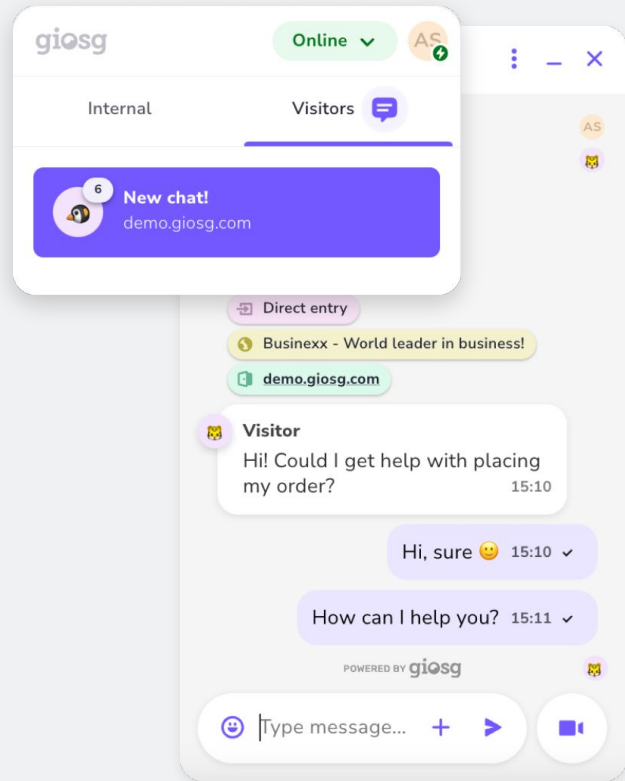
3 Chatting

The basics

Respond to incoming chats

You'll see a notification when a new chat starts. **Join the chat by clicking on the notification.**

If you've enabled push and sound notifications in your profile settings, you will also be notified with these.



3 Chatting

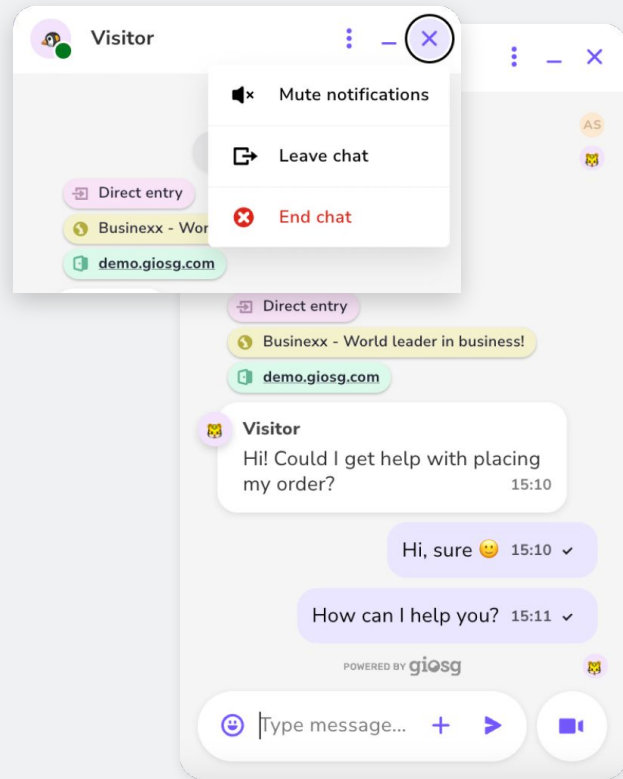
The basics

Leaving a chat

You can leave a chat by **clicking the X-icon in the top right corner** of the chat window. Leaving the chat allows you to close the window without ending the actual conversation. If the visitor returns, also other agents will be notified and are able to join the chat.

In addition to leaving, you also have the option to:

- **Mute notifications:** The conversation stays assigned to you, but you will not be notified of new messages.
- **End chat:** End the conversation completely, meaning that neither the visitor nor you can send new messages to it.



3 Chatting

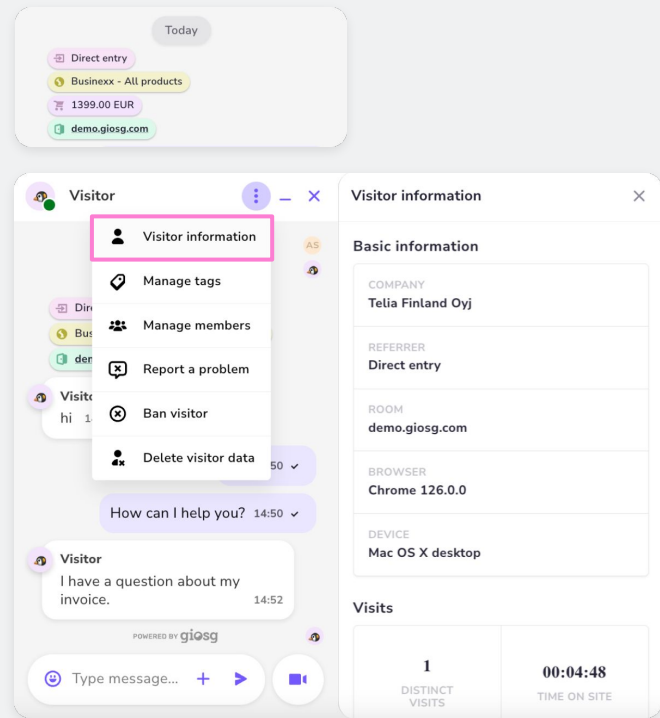
The basics

Visitor information

The “pills” in the beginning of a chat conversation shows information about the visitor:

- Current page & traffic source
- Chat room
- Shopping cart value (available if your organisation has configured shoppincart tracking through giosg Basket)

For more information about the visitor, click on the **Visitor** text at the top of the window or the options menu and then **Visitor information**.



2 Chatting

3.2

Chat features

Canned answers

AI reply suggestions

File sharing

Tagging

Chat invitations: Inviting a coworker

Chat invitations: Accepting an invitation

Sending interactions in the Chat

Other features

3 Chatting

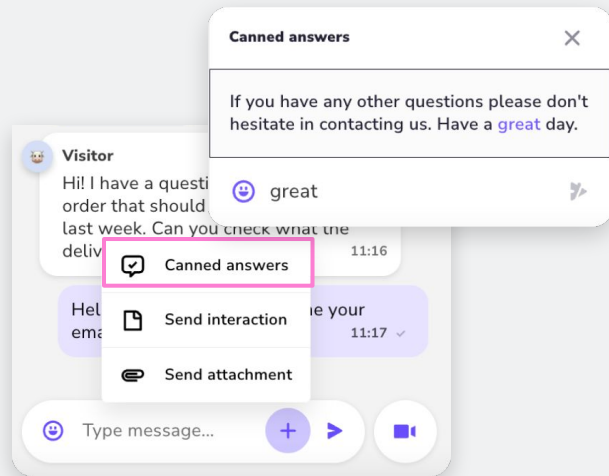
Chat features

Canned answers

For frequently asked questions, Canned answers are a great tool for speeding up the answering process.

You can **access Canned answers from the + button** next to the message field. Once you have opened the Canned answers menu, you can scroll through available answers or filter them by writing words that are included in an answer.

The keyboard shortcut for accessing Canned answers is “!” (needs to be the first character of the message written).



3 Chatting

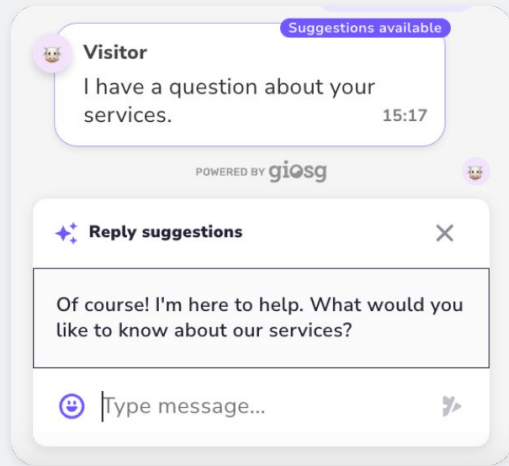
Chat features

AI reply suggestions

Reply suggestions, generated by AI, bring efficiency to answering customer inquiries in the chat. Suggestions are generated for each message and they can be viewed and used by **clicking on the *Suggestions available* badge**.

Select a reply by clicking it and it will be inserted in the message box, from where it can be edited and sent.

AI reply suggestions are available to customers using giosg Copilot.

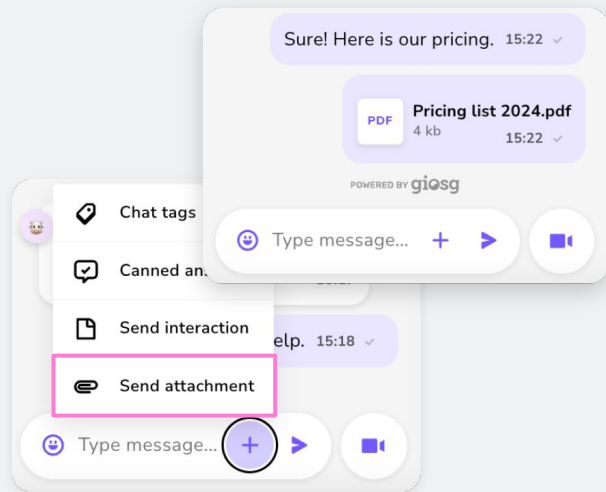


3 Chatting

Chat features

File sharing

Sharing files to the visitor is possible from the button next to the message field.




3 Chatting

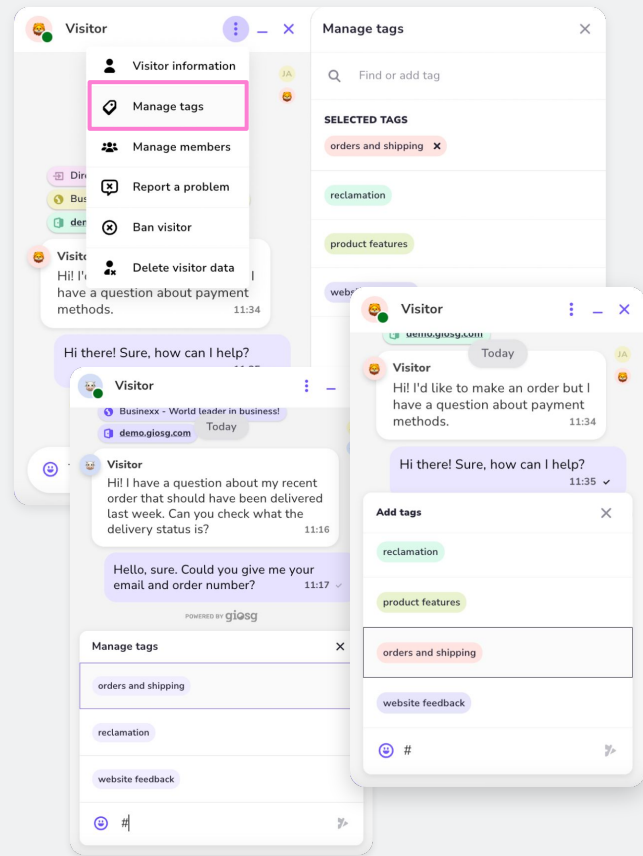
Chat features

Tagging

Tags can be used for categorizing conversations. The list of available tags can be opened in 3 ways:

1. Typing hashtag "#" in the message field.
2. Clicking the options menu  at the top and then *Manage tags*. Here, you can also remove already added tags from the conversation.


When you've opened the list of tags, you can choose the tag(s) that you want to attach to the conversation.



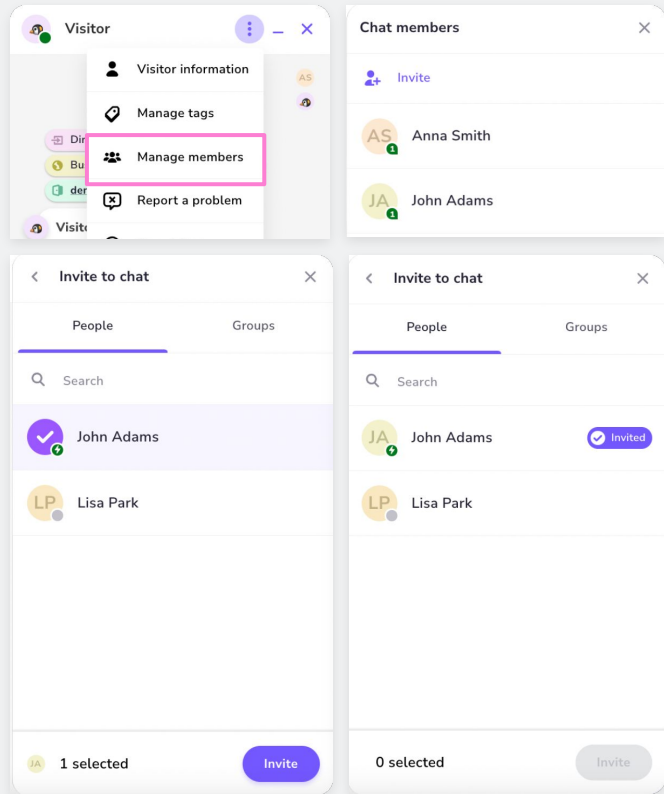
3 Chatting

Chat features

Chat invitations: Inviting a coworker

Invite a coworker to a chat from the options menu  by first selecting **Manage members** and then **Invite**.

You can then select an individual person or a team to send the invite to. Once the invite has been sent and your colleague has joined, you can leave the chat.

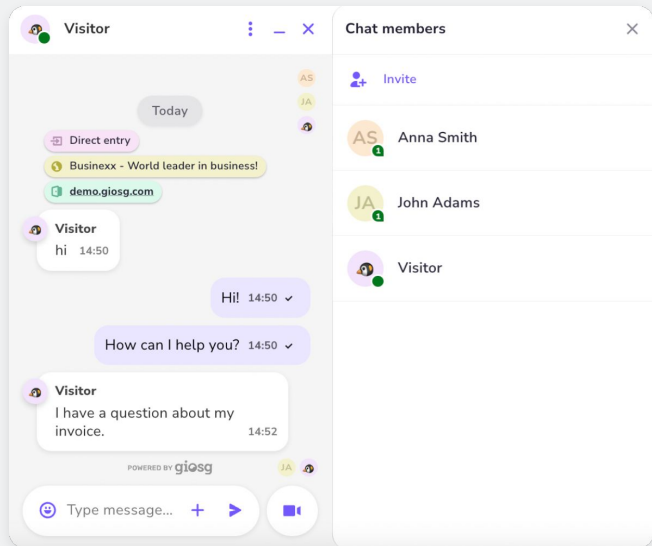
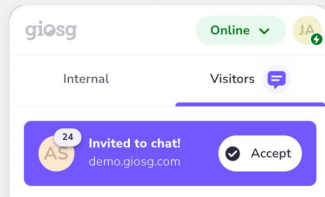


3 Chatting

Chat features

Chat invitations: Accepting an invitation


A notification appears when a coworker invites you to a chat. **Click on the notification to accept the invitation and join the conversation.**



3 Chatting

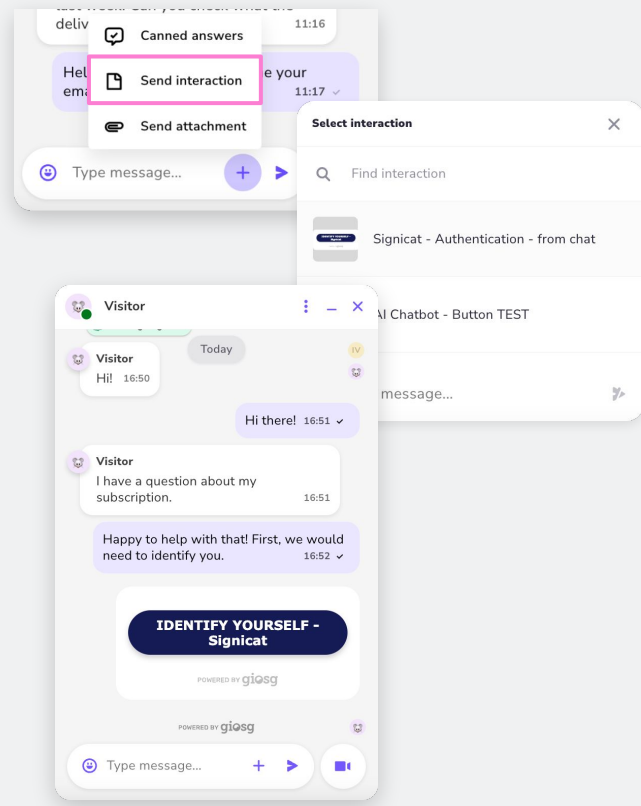
Chat features

Sending interactions in Chat

You can send an interaction to a Visitor from the  button at the bottom of the window. This allows you to for example:

- Ask the visitor to identify themselves through Strong authentication
- Ask the visitor to fill out a questionnaire during the conversation
- Share a product card to allow the visitor to add items to their shopping cart with a quick Click-to-Action approach

Click on the interaction that you want to use and send it as a message. The interactions are made available by your admin users.



3 Chatting

Chat features

Other features

Report a problem

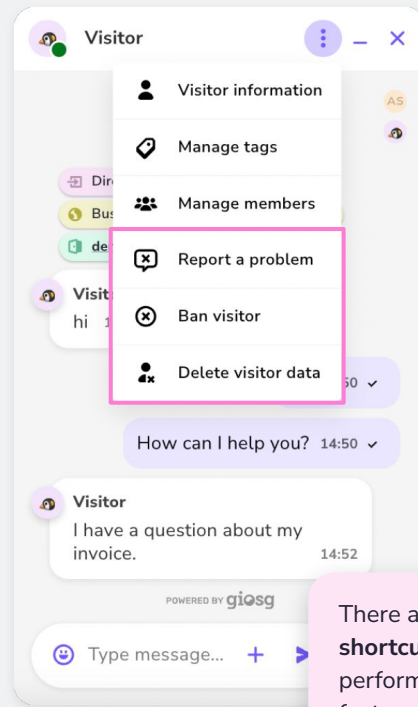
If there's a technical issue in the system, you can report it to giosg support by sending a problem report.

Ban visitor

If a visitor shows disruptive or inappropriate behavior, they can be banned. This stops them from chatting.

Delete visitor data

If a visitor asks for their data to be removed, this feature can be used to delete the conversation when it is finished. Also other information about the visitor and potential earlier conversations are deleted.



There are also **Keyboard shortcuts** available for performing key actions and features. Visit our [Keyboard shortcuts article](#) to find out more.

4


Video calls

Starting a call from a chat
Receiving an incoming call
During the call
Ending a call

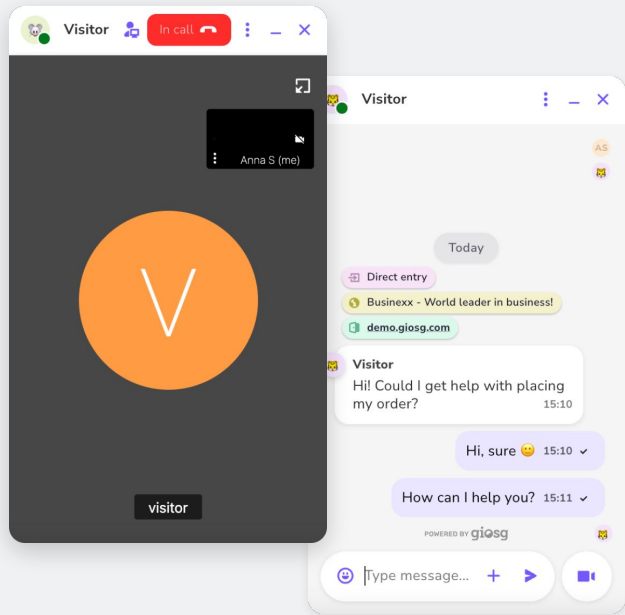


Video Calls

Starting a call from a chat

A **chat can be turned into a video call** by clicking on the camera  button in the bottom right of the window, next to the message field.

The call will start when the visitor accepts it.



Video Calls

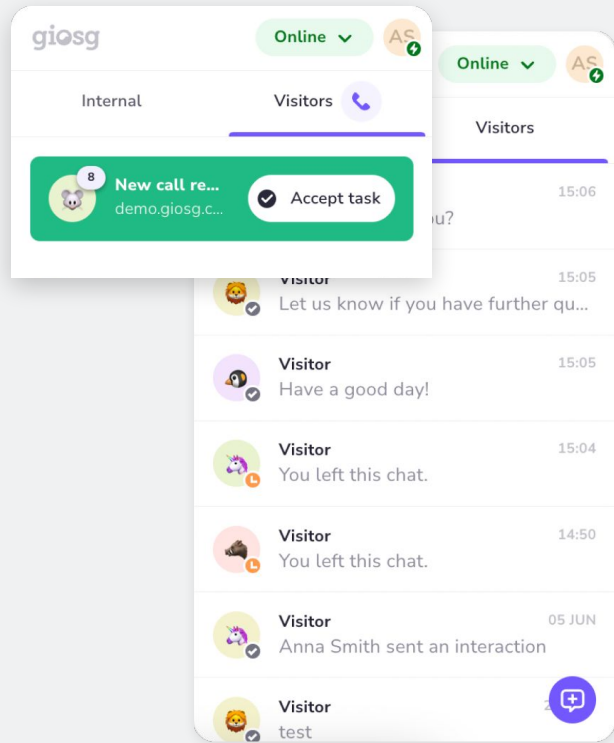
Receiving an incoming call

When a visitor requests a call, a notification will appear in the list.

Join the call by clicking on the notification.

Remember that you need to be **Online** to accept calls.


If you've enabled push and sound notifications in your profile settings and your device, you will also be notified with these.



4 Giosg for Agents

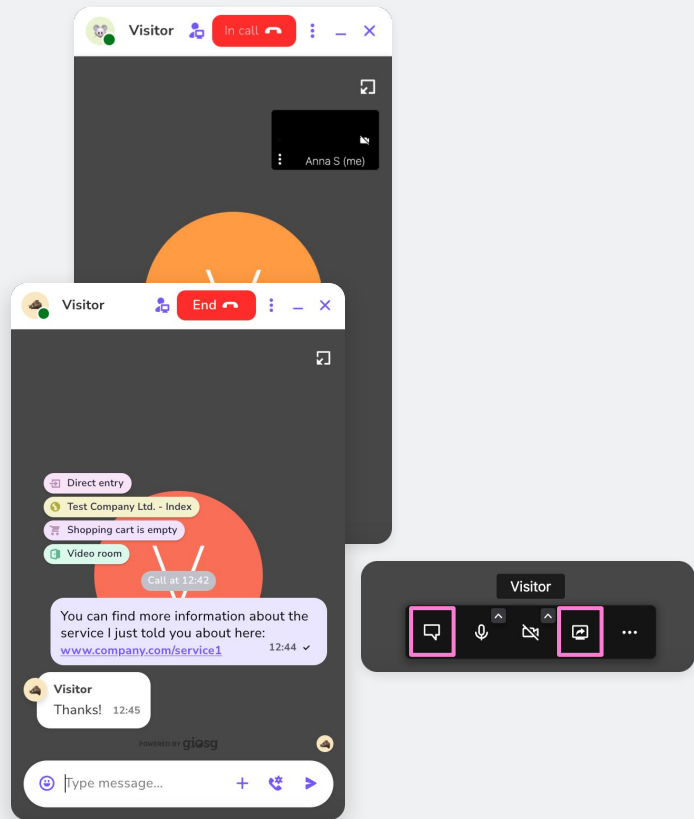
Video Calls

During the call

You can request the **visitor to share their screen with you** by clicking on the  icon at the top of the call window. You will see their screen when they accept to share it.

You're able to **share your own screen** from the options at the bottom of the window.

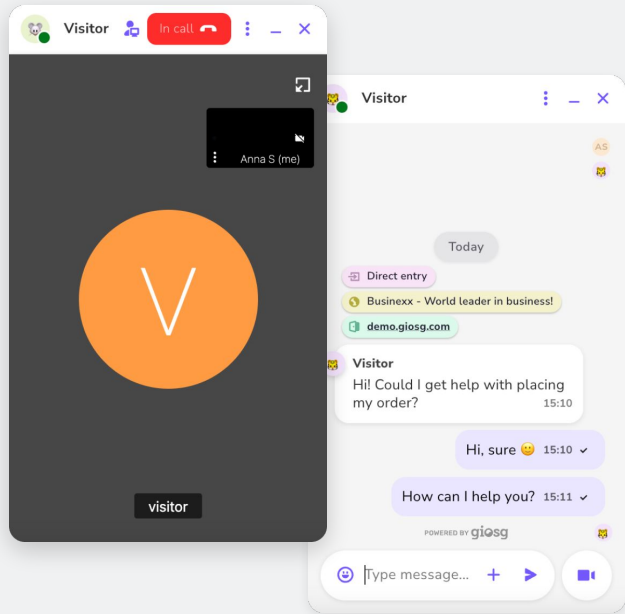
The chat is available for both parties to use throughout the call.



Video Calls

Ending the call

The call can be ended from the red **End** button at the top of the window. Both you and the visitor can end the call at any time during the call.



Initiate phone calls with website visitors and customers through the giosg Live User interface.

Phone calls

5.1 Inbound calls

5.2 Outbound calls



5 Phone calls

5.1

Inbound calls

Accepting a call request

A call starts

Ending a call

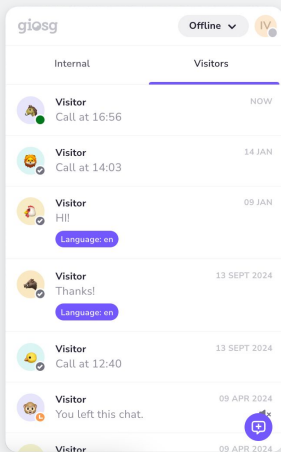
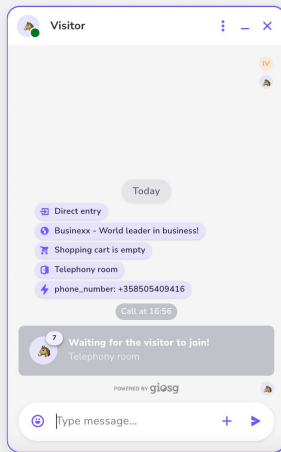
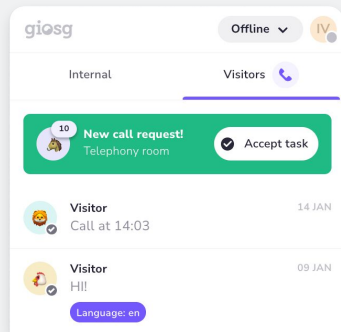
5 Phone calls

Inbound Calls

Accepting a call request

When a customer requests a call through your website, a notification appears in the giosg menu. Take on the call task by clicking **“Accept task”**.

Accepting the task triggers a call to the phone number that the customer has provided.



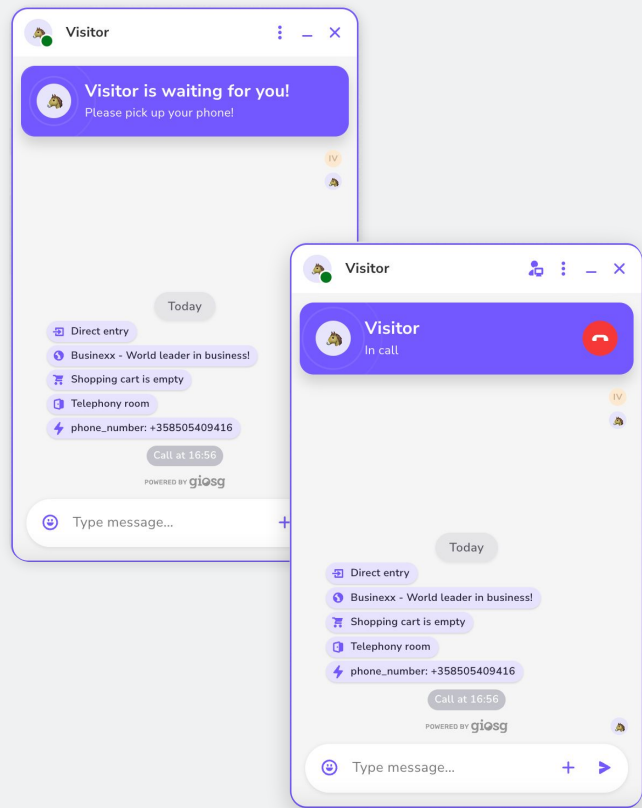
5 Phone calls

Inbound Calls

A call starts

When a call has been triggered and answered by the customer, you will receive a new notification in giosg and your phone will start ringing.

Answering your phone allows you to join the call with the visitor.

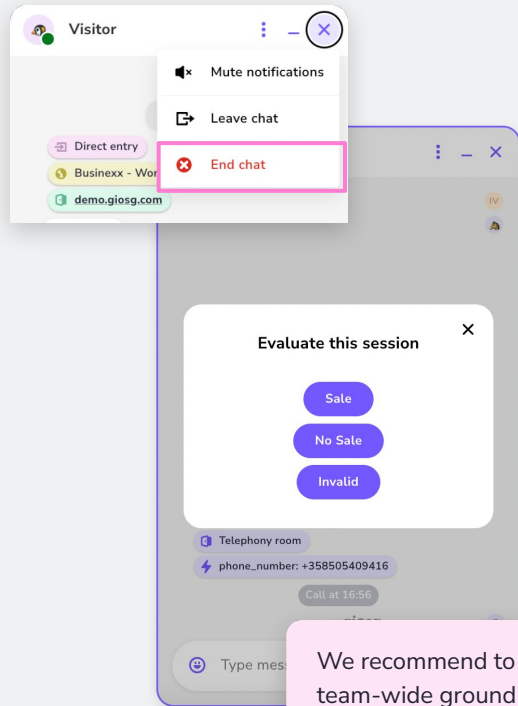


5 Phone calls

Inbound Calls

Ending a call

Once the phone call has been ended by you or the customer, you're left with an open window in giosg. End the session by clicking **✕** "End chat" and **evaluate the outcome** of it.



We recommend to set team-wide ground rules on when to use each outcome.

5 Phone calls

5.2

Outbound calls

Initiating a call


A call starts

Ending a call

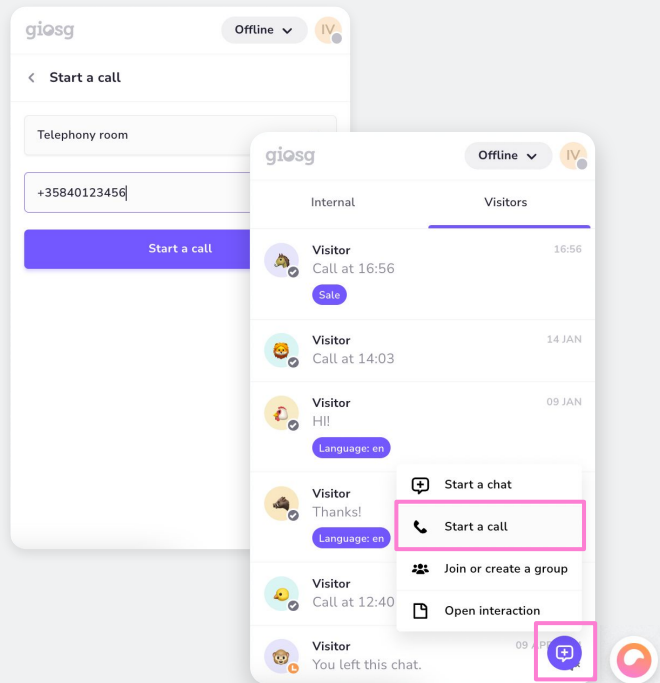
5 Phone calls

Outbound Calls

Initiating a call

Choose “**Start a call**” via the  button and fill in the number you’d like to start a call with.

Starting a call triggers a call to the phone number that you provided.



The room you should choose is instructed by your manager.

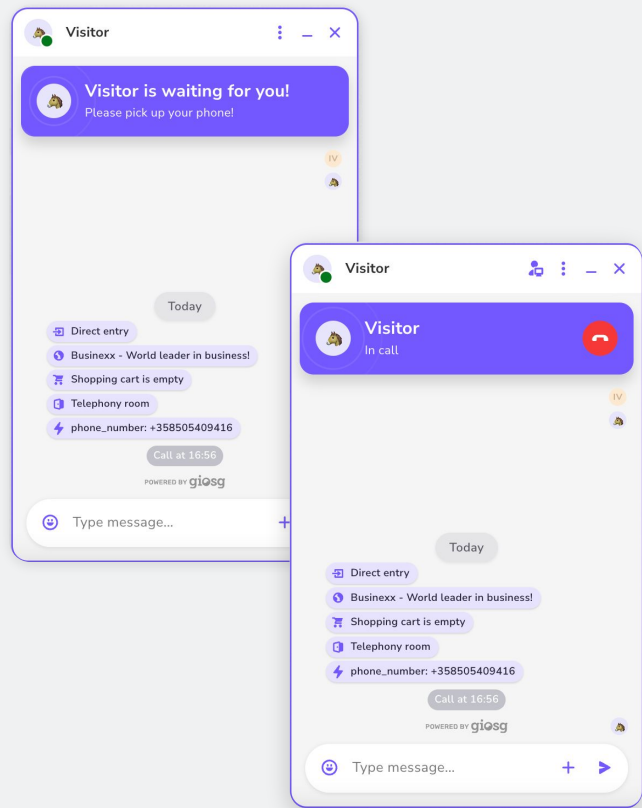
5 Phone calls

Outbound Calls

A call starts

When a call has been triggered and answered by the customer, you will receive a new notification in giosg and your phone will start ringing.

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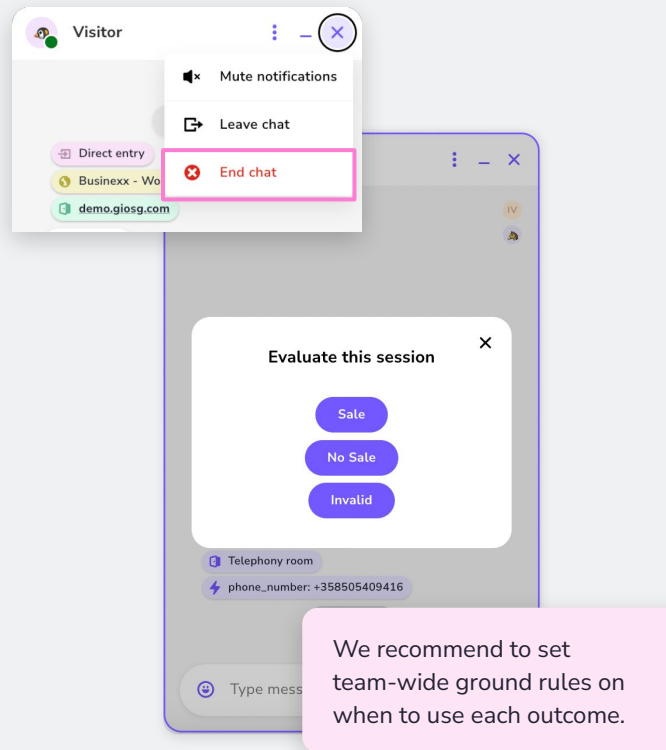


5 Phone calls

Outbound Calls

Ending a call

Once the phone call has been ended by you or the customer, you're left with an open window in giosg. End the session by clicking **X** and **End chat**, and **evaluate the outcome** of it.



6

Mobile app

Using giosg on your mobile



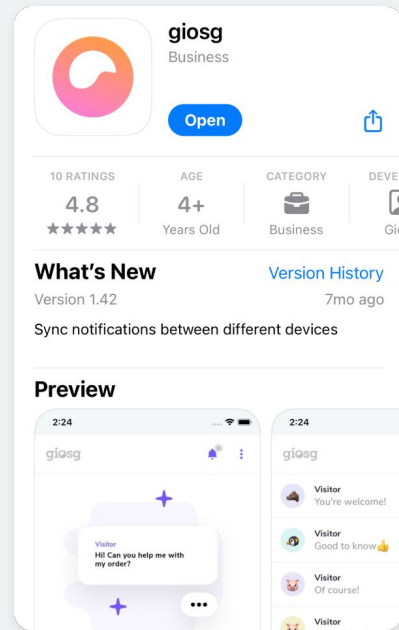
6 Mobile app

Using giosg on your phone

Downloading the giosg App

If you want to use your Mobile phone for handling chats and calls, you can use giosg's mobile app.

Download the giosg app from the App Store on your iOS device, or Google Play Store on your Android device.



Using giosg on your phone

Logging in and allowing notifications

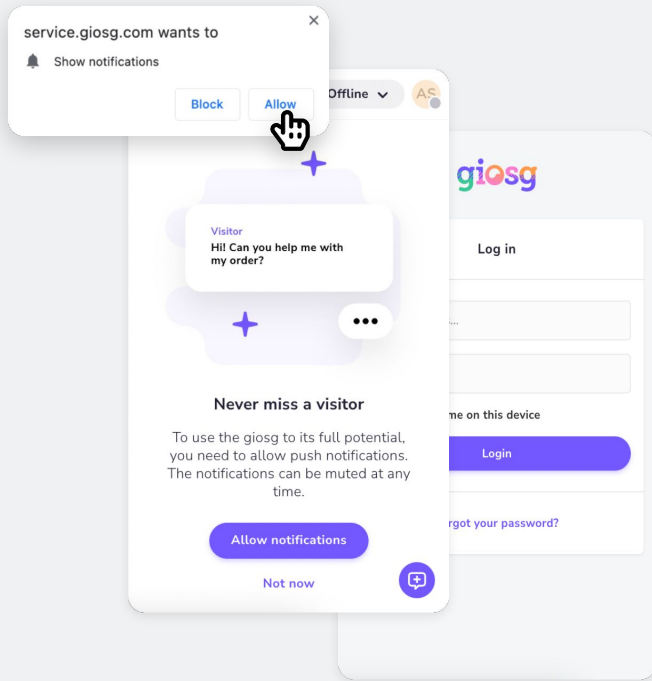
Launch the giosg app and log in with your giosg credentials.

When you log in for the first time on **iOS**, select **Allow notifications**. Your browser will also request your permission to send you notifications. Select **Allow** here as well.

We highly recommend allowing notifications, as they will be hard to recover if not allowed, especially on the system level.

When logging in for the first time on **Android**:

1. Select **Allow** to take pictures and record video and audio
2. Enable giosg calling account in your phone by selecting **open settings**
3. Select **Allow** to manage and make phone calls



7

Chrome extension for Desktop

Easily communicate in giosg Live while working in other sites and tabs, by allowing it to float on top of that site.

Using giosg Live anywhere

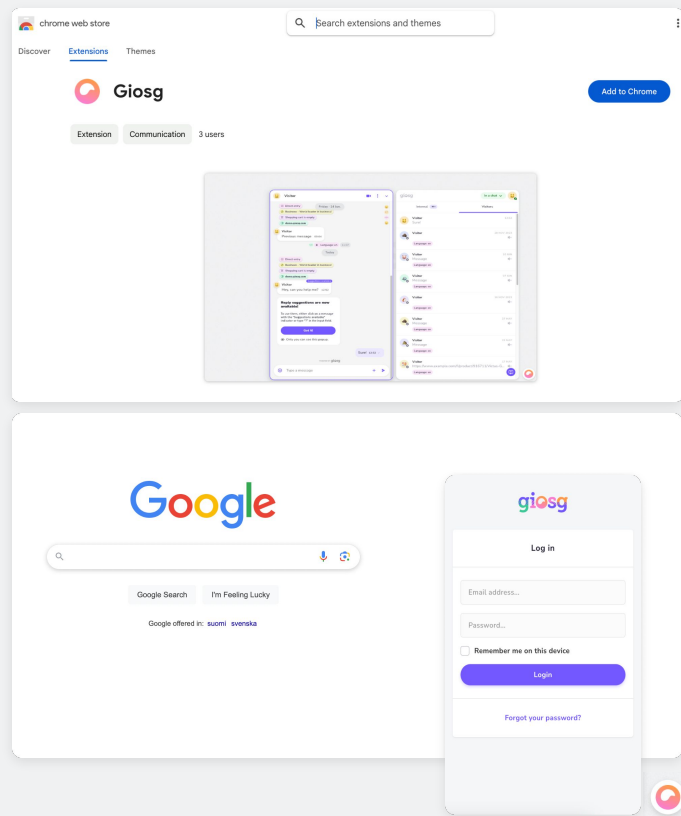
Installing and using the Extension

Visit the [Chrome Web store](#) and search for *giosg* or go directly to [this link](#) and Install the extension from “Add to Chrome” → “Add extension”.

The extension is immediately ready to be used and **it allows you to communicate with your customers with any site open in the background**.

By default, the extension is available on all sites but you can also, from the extension settings, give site access only to specific sites.

You can show/hide all giosg related windows by clicking on the giosg logo that floats in the bottom right corner of the page.



Got questions?

Reach out to us in our chat or by emailing
support@giosg.com

For more guides and articles, please visit our Help center at support.giosg.com/knowledge