



# CHAT MODULE INSTRUCTION MANUAL



OTYS Recruiting Technology





## CONTENT

1	Introduction .....	4
1.1	About the Chat module .....	4
1.2	Instruction objective .....	4
1.3	Instruction structure .....	4
2	Internal chat in OTYS Go! .....	5
2.1	Add contacts .....	5
2.2	Chat with contacts .....	6
2.3	Chat from dossier .....	7
3	Chat on your website .....	9
3.1	Overview screen .....	9
3.2	Manage chats .....	10

# 1 | INTRODUCTION

## 1.1 ABOUT THE CHAT MODULE

As an OTYS Go! user you have two different chat functions available. On the one hand there is the chat function within OTYS Go! which allows you to chat with colleagues and other contacts, and on the other hand there is the Live chat that can serve as support for visitors to your website. This instruction manual describes both types of the chat functionality.

## 1.2 INSTRUCTION OBJECTIVE

These instructions are intended for OTYS clients, to enable them to configure and use the chat function in OTYS Go! as well as the chat function you can set on your website.

## 1.3 INSTRUCTION STRUCTURE

After this introduction we will explain the available functions and possible actions you can execute with the Chat module:

- The OTYS Go! chat functionality that is configured for internal use.
- The chat functionality for interaction with your website visitors.

## 2 | INTERNAL CHAT IN OTYS GO!

The chat in OTYS Go! is designed to chat with persons on your contact list. This not only lets you access your colleagues easily, but also your relations with whom you have regular contact. You can only use the Chat module with contacts who also work with OTYS. You can recognise the chat function in OTYS Go! by the speech bubble in the Go! bar at the top of your screen.



Fig. 1 – Open chat function in OTYS Go!

### 2.1 ADD CONTACTS

The chat window will open on the right side of your screen and displays your contacts and the people with whom you have chatted in the past ('Recent'). Add contacts by clicking the '+' next to 'Contacts'.

You can then search for the relevant person by entering the name at 'Search'. You will be given automatic suggestions based on the letters you enter. You have the option to select a function. Select the contact you are looking for and click 'Add contact'. From now on it will appear in your list of contacts so you can quickly find this person in the future.

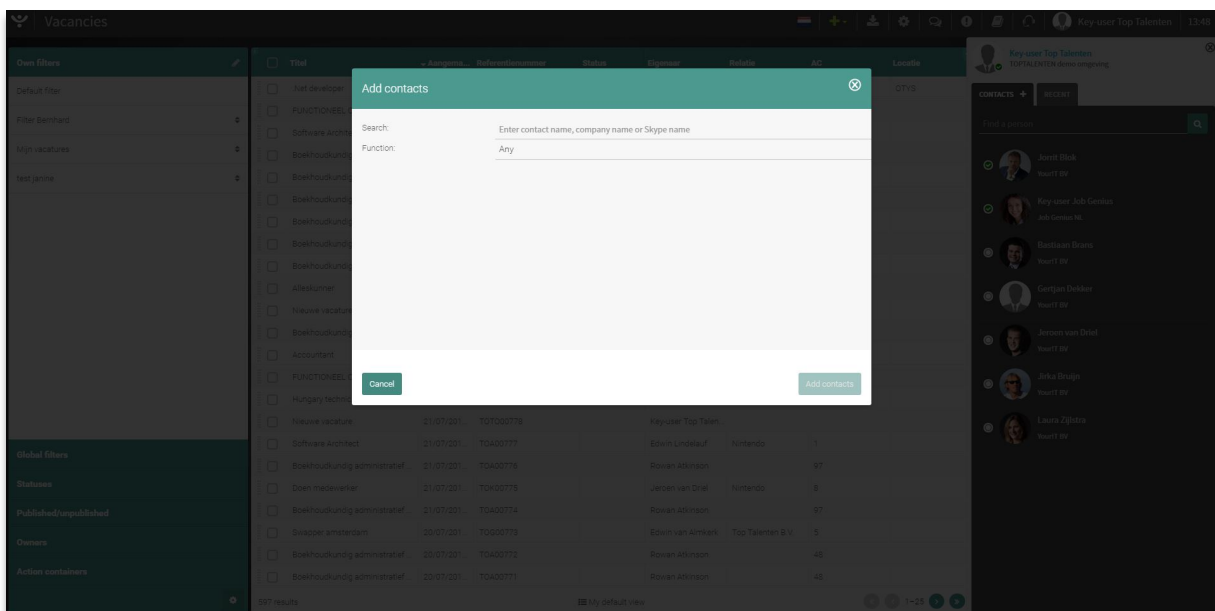


Fig. 2 – Add contacts to your chat list.

If you add someone, or if someone adds you, the one that is added will be notified in OTYS Go! You have the option to respond to the request by accepting, deleting the request, or deleting the request and blocking any future requests.

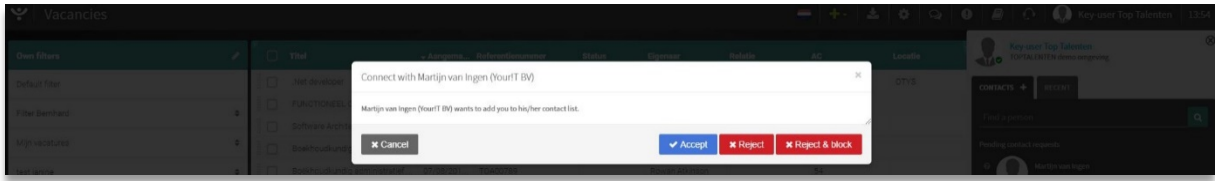


Fig. 3 – Accept or reject contact request.

## 2.2 CHAT WITH CONTACTS

To chat with your contacts, click the name of the person you want to chat with. The chat window will open so you can start chatting immediately. In case of a new message, you will be alerted with a notification on your screen. The notification can be disabled by clicking on the cog wheel icon in the window.

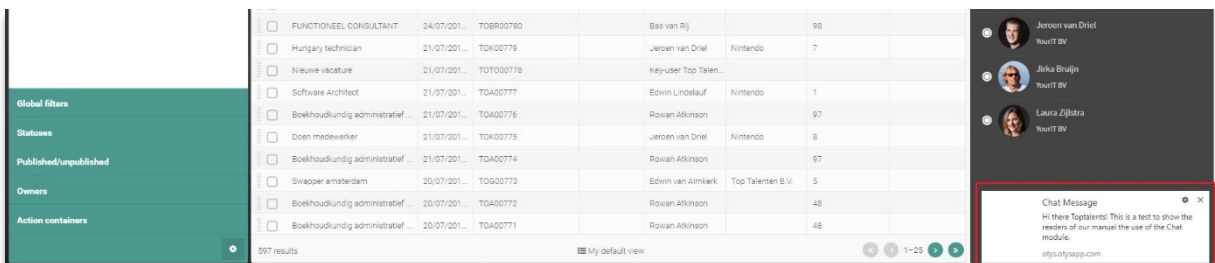


Fig. 4 – Notification of incoming chats. You can disable this with the cog wheel icon.

### 2.2.1 STATUS OF CONTACTS

The online status of each contact is displayed in front of their name. A contact who is online is displayed with a green tick in front of the name. Someone who is offline has a grey circle in front of the name. You can chat with someone who is offline, but these messages will only be read when the user is logged into OTYS Go! New chats will appear with a number (the number of new chats) in the speech bubble.



Fig. 5 – The number of unread chats will be displayed by a number above the speech bubble.

### 2.2.2 DISPLAY YOUR OWN STATUS

You can set your own internal chat availability. You have the option of the following statuses:

- **Online**  
Contacts can instantly chat with you.
- **Absent**  
You can set this status if you do not immediately have the opportunity to reply to chat messages. Contacts can still send messages to you.

- **Do not disturb**  
This status can be set if you do not want to be disturbed. Contacts can send you messages, but you will not receive notifications of them.
- **Invisible**  
You are not visible in the chat for contacts and you will appear as offline. You can send and receive chat messages.
- **Offline**  
Let your contacts know you are not online. You cannot send messages. Contacts can send chat messages, but you will receive them only when you are logged in again on the chat.

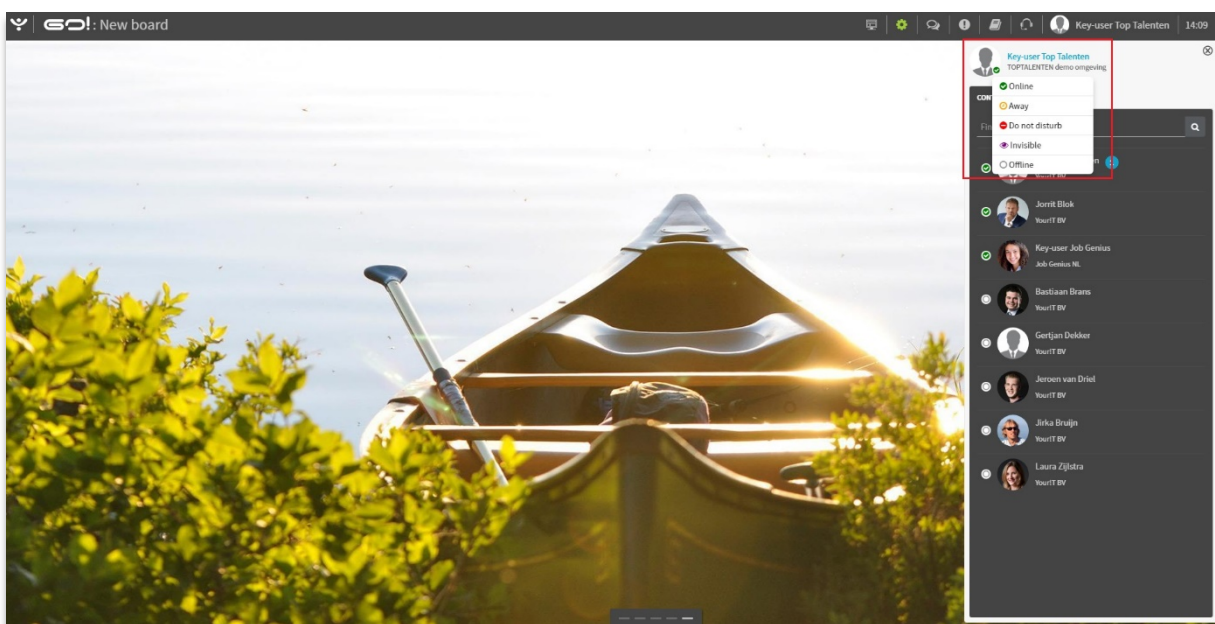


Fig. 6 – Manage your own internal chat status.

## 2.3 CHAT FROM DOSSIER

In OTYS Go! you can use the chat feature to quickly inform your contacts, for example, about a vacancy or a candidate. Go to the dossier of a particular module and click on the Chat icon. Then select a contact you want to inform. They will instantly receive a chat message with the subject referring to, for example, the name of the vacancy or candidate. For the complete functioning of the dossier and which modules have a chat function, please read the Dossiers instruction manual.

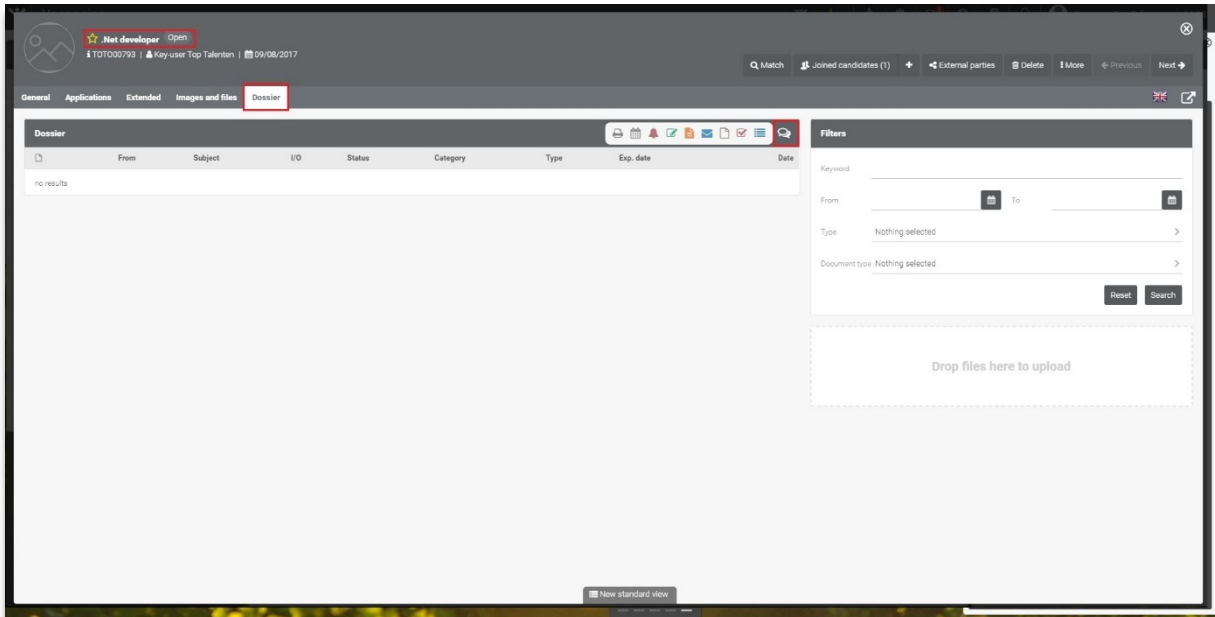


Fig. 7 – Chat from a dossier in OTYS Go!

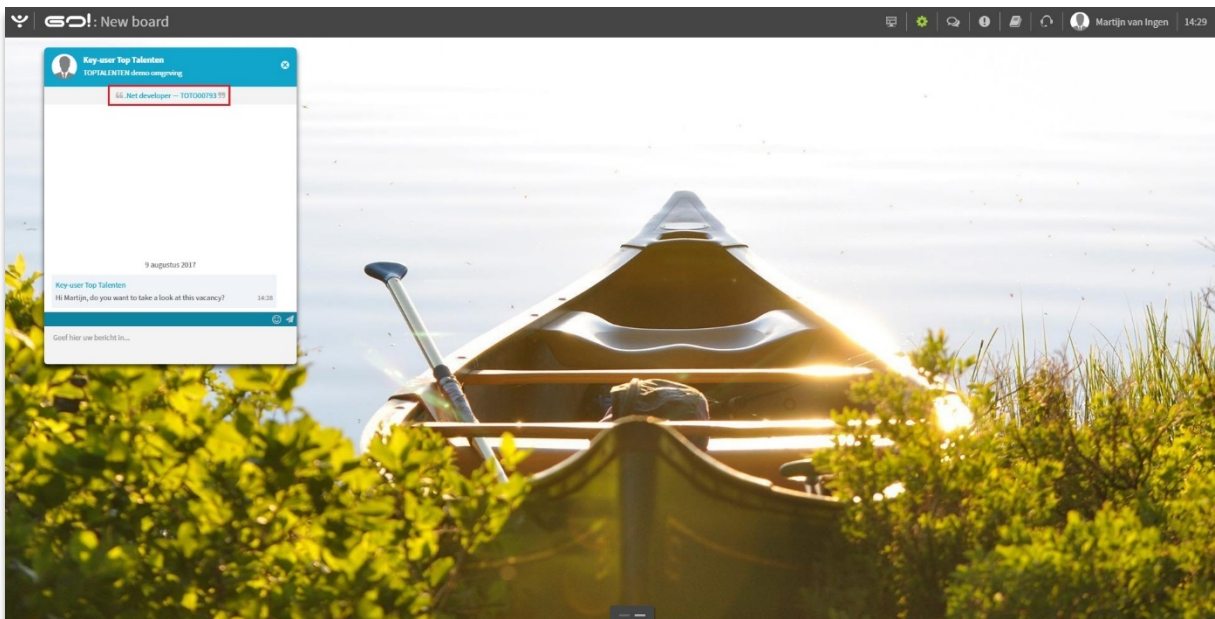


Fig. 8 – If you chat from a dossier, the topic of the chat will be adapted automatically.



### 3 | CHAT ON YOUR WEBSITE

The Chat module is designed to offer clients the opportunity to easily ask questions. Visitors to your site can start a chat on any page with an operator who is online at the time.

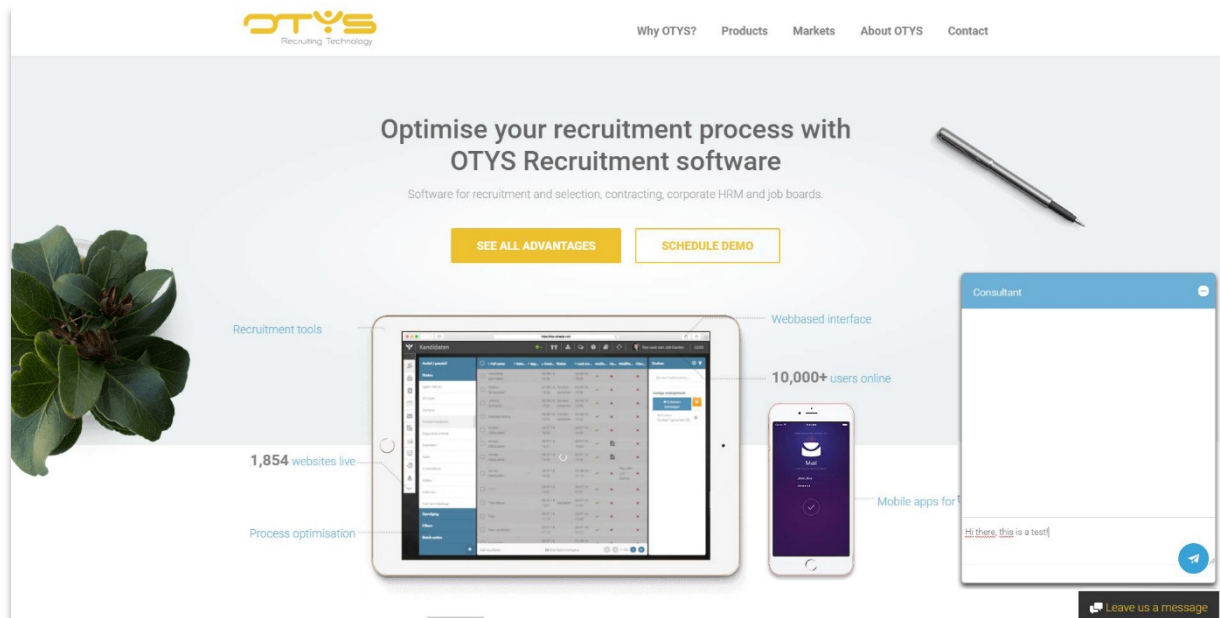


Fig. 9 – The chat window is located in the bottom right corner of your screen (depending on your needs). It will open when a visitor clicks on it.

#### 3.1 OVERVIEW SCREEN

You can chat with your site visitors via the Live Chat. The overview screen of the Live Chat gives an overview of the following:

- **Incoming chats**  
The number of new chats is shown here.
- **Active chats**  
The number of active chats is shown here.
- **Online operator(s)/offline operator(s)**  
The number of online and offline operators is shown here.
- **Longest/shortest waiting time**  
Longest and shortest waiting time indicates how long it took for a chat to be marked as 'Resolved'. More about marking chats as 'Resolved' in section 3.2.6.
- **Online agents**  
Here, the name of the person who is logged in is displayed in the Live Chat. Visitors to the website will see this name when they start a chat.

The pie chart shows the percentage of all chats on your website that are marked as 'Resolved'.

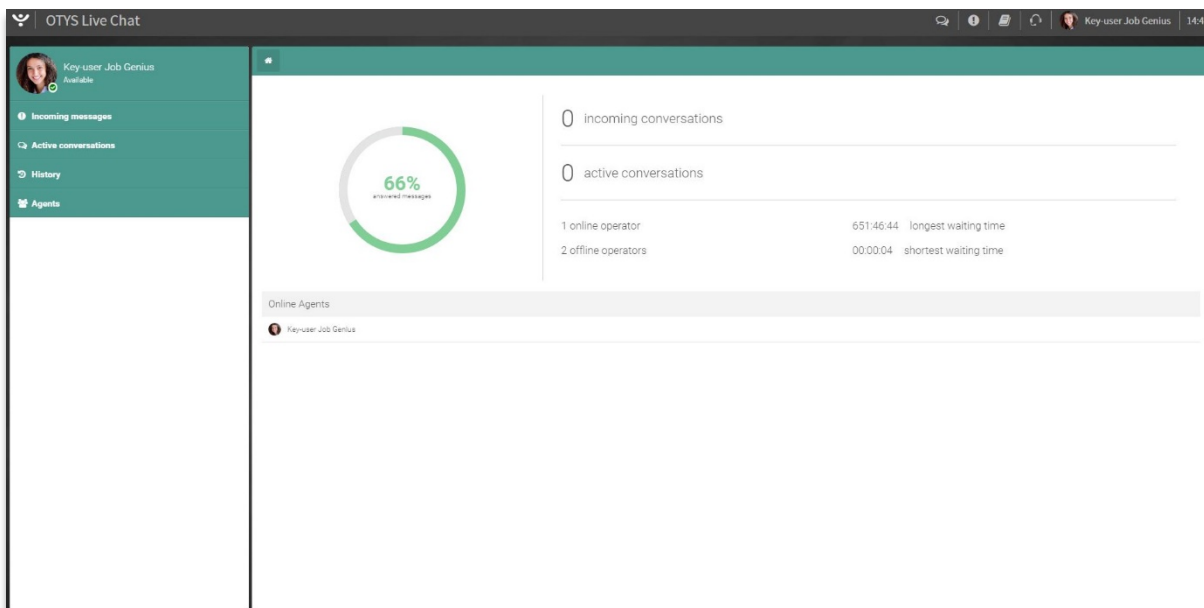


Fig. 10 – Overview screen OTYS Live Chat.

### 3.2 MANAGE CHATS

The functions to manage chats are on the left side of the overview screen.

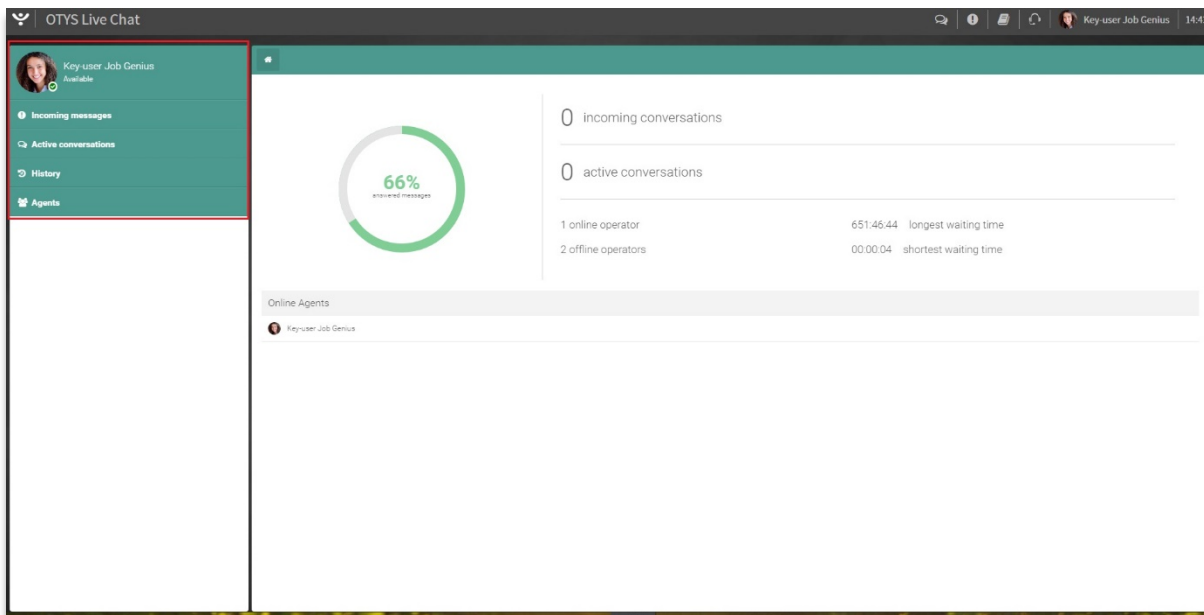


Fig. 11 – Function groups to manage chats in OTYS Live chat.

### 3.2.1 AVAILABILITY

You can indicate your availability by clicking 'Available', beneath your name or on the status icon next to your profile picture. You can choose between 'online' and 'offline'.

### 3.2.2 INCOMING CHATS

If a visitor starts to chat on your site, this is indicated by 'Incoming conversations' and 'Incoming chats'. The window 'Incoming chats' will open slightly. You assign a chat to yourself by clicking on the chat. It is possible that another operator takes over the chat, or for you to assign multiple chats to yourself. More on this can be found in section 3.2.7.

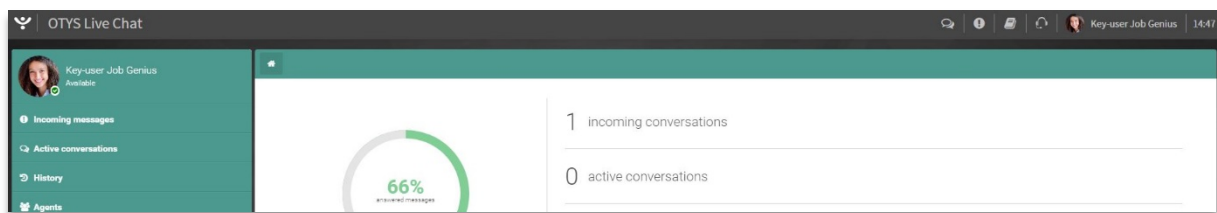


Fig. 12 – Display of incoming conversations.

### 3.2.3 ACTIVE CHATS

All active chats can be found under this header. By clicking on the chat, you can switch between them. All active chats are also to be found at the top of the chat window that you have open at that time.

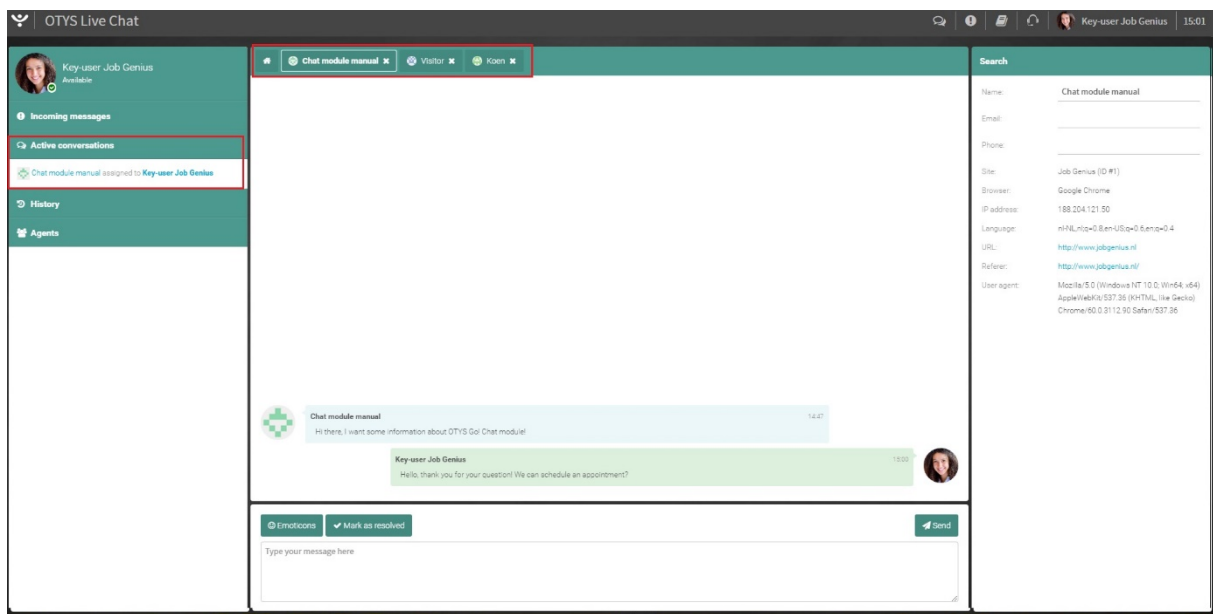


Fig. 13 – Places where you can find active chats.

### 3.2.4 HISTORY

Under the header History you will find your complete history of chats marked as resolved. The chats are arranged by date and you can no longer respond to them.

### 3.2.5 OPERATORS

Under the header 'Operators' you can find all users in OTYS Go! who have access to the Live Chat. Behind each user name you see who is online and who is offline.

### 3.2.6 MARK CHAT AS RESOLVED

All chats that are not marked as 'Resolved' will remain visible in 'Active chats'. If you have concluded a chat, then click 'Mark as resolved'. The system will ask for confirmation before the chat will be closed. After the chat has been marked as resolved it remains possible for the visitor to continue chatting. The chat will be re-opened in the existing chat.

### 3.2.7 MANAGE MULTIPLE CHATS

If you have a busy chat on your site, it may be convenient to assign multiple chats to multiple colleagues by assigning chats to other persons. To keep the overview (every new chat will be called 'Visitor'), see the 'Search' screen on the right side of the chat window. This screen allows you to name the visitor, and enter the email address and telephone number. In this way, you can easily search for the right chat if multiple chats are open. You can assign a chat to yourself by clicking 'Assign to me' in the open chat window.

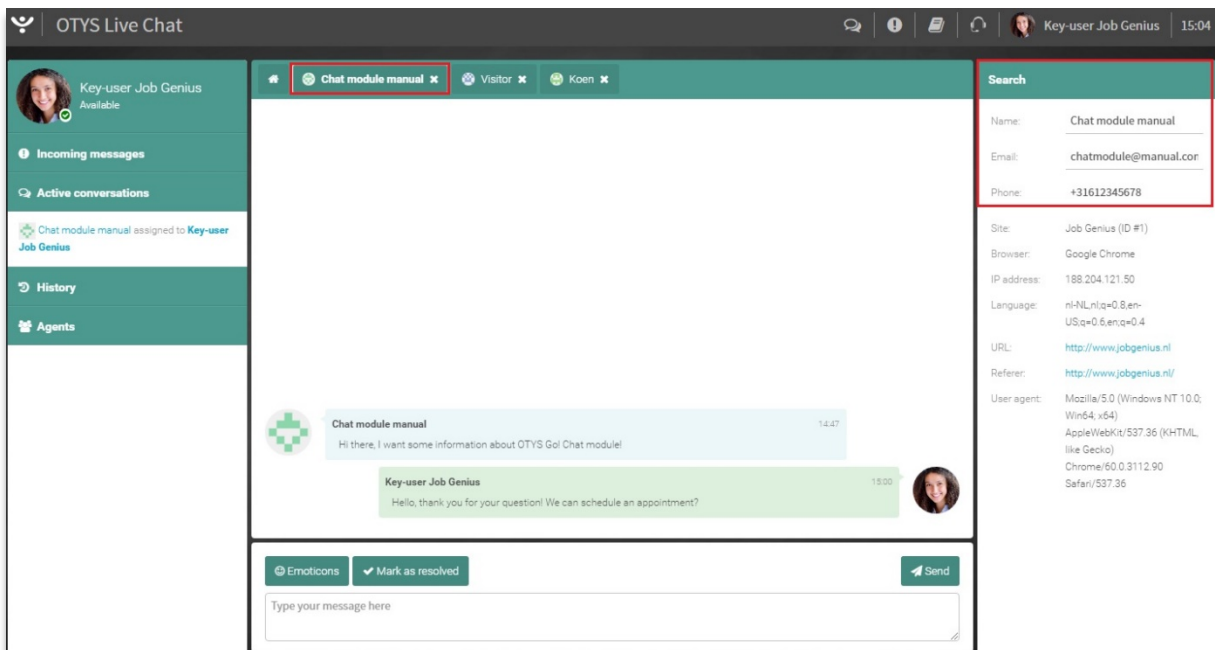


Fig. 14 – Easy chat retrieval with the search function.

### 3.2.8 OTHER INFORMATION

Under the header 'Search' you will find some additional information.

- **Website**  
Website indicates from which site the chat was started. This is useful in case you manage multiple websites with a chat function.
  - **Browser**  
Browser indicates the type of browser the visitor is using. This may be important to know in order to remedy, for example, certain support issues. There are, for example, certain extensions or plug-ins that might work differently for different internet browsers.
  - **IP address**  
An IP address indicates the location of the visitor.
  - **Language**  
This is a specific technical functionality that may be relevant to a website builder and will for this reason not be explained in this instruction manual.
  - **URL**  
This is the URL of the website where the visitor started the chat.
  - **Referrer**  
Clicking 'Refer' takes you directly to the specific page where the visitor started the chat. This differs from URL, where only the home page link is shown.
- User agent**  
This is a specific technical functionality that may be relevant to a website builder and will therefore not be further explained in this instruction manual.

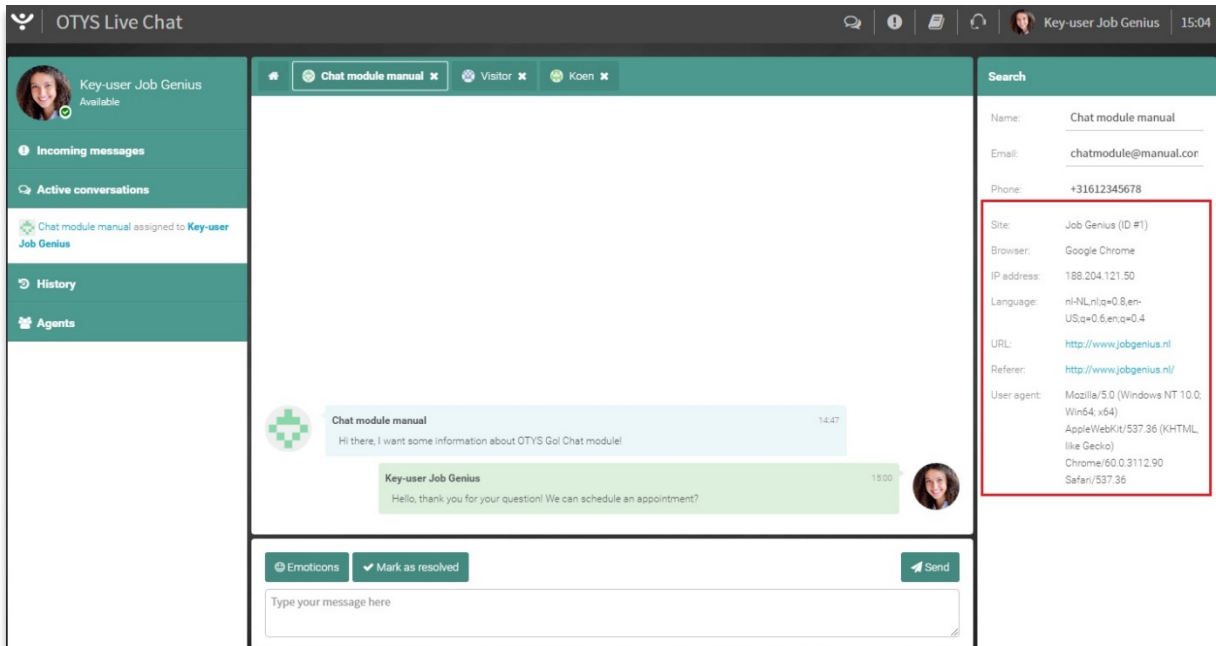


Fig. 15 – Other visitor information.

