

Admin Center Getting Started Guide

Useful Links

- [Create an Account](#)
- [Help Center](#)
- [Admin Center](#)
- [Agent Workspace](#)
- [Supervisor Dashboard](#)
- [Reporting](#)

Customer Support

- Chat with us
- Tweet us: @Bold360
- Submit a ticket

Call us: 7:30PM Sunday -
9PM Friday (EST)

- US/CA +1-781-897-5090
- UK +44-20-7851-8490
- Australia +61-2-8199-8970
- India +91-80-61220008

Bold360 is an intelligent customer engagement solution that provides a modern, flexible way for your business to interact with customers and prospects, while providing your agents with a real-time, 360-degree view of all touchpoints and contextual data in a single solution.

This guide will walk you through several key steps to set up your Bold360 account and will familiarize you with important functions of the Admin Center. It is not intended for use as a step-by-step guide to completely configure your Bold360 implementation. Administrators should visit the [Bold360 Help Center](#) for a complete “how-to” reference guide.

Let’s Get Started

Before using Bold360, you must first have an account. If you don’t have one, you can [create one here](#). Once you have created your account, log in to the Admin Center at admin.bold360.com (best viewed in Chrome).

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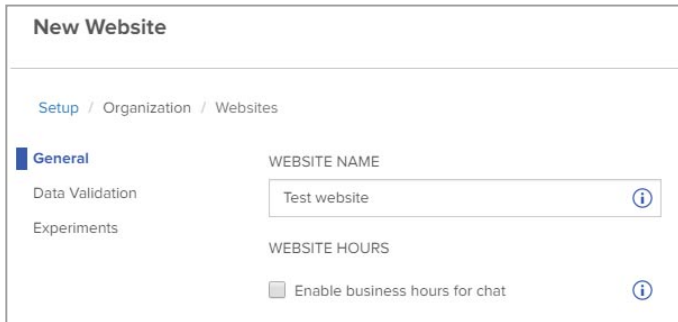
Set Up Your Chat Experience

Most Bold360 implementations have a chat experience as part of an overall customer engagement strategy. To get started, you'll need to set up a website, a chat button, and a chat window.

Create a Website

By defining one or more websites you can easily manage chat deployments across multiple sites or domains. Use intuitive names to associate your websites with these settings which help track the origin of visits and manage business hours. When used with the Chat Rule Engine, website settings also help you manage routing of incoming chats.

1. Go to **Organization > Websites** and click **Create New**.
2. Name the website.
As an example, we've named it *Test website*. Within this view you can also set criteria for [Data Validation](#) and test strategies in [Experiments](#).
3. **Save** your changes.



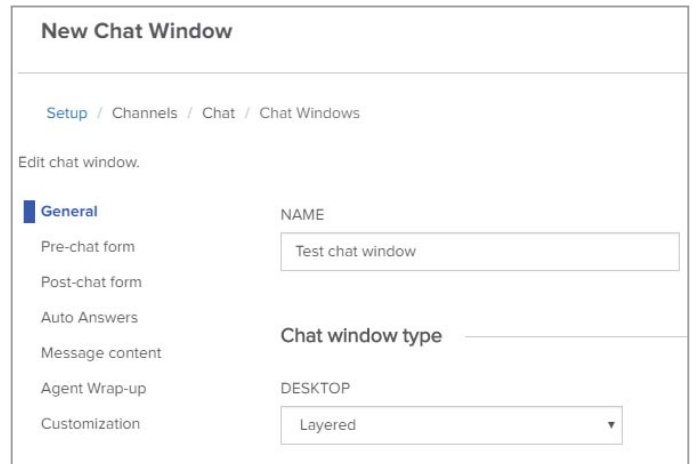
Need more info?
There's an entire [section about websites](#) in our Help Center.

Create a Chat Window

A chat window is the visual representation of the chat interface a visitor sees after clicking a chat button or invitation. Chat windows can be layered or pop-up, and can be customized in a number of ways. We

recommend you use a layered chat window for the best possible customer experience.

1. Go to **Channels > Chat > Chat Windows** and click **Create New**.
2. Name the chat window.
As an example, we've named it *Test chat window*.
3. A handful of default properties are automatically configured, feel free to browse some of the additional settings.
4. **Save** your changes.



Need more info?
There's a [section about chat windows](#) in our Help Center.

Create a Chat Button

Chat buttons are entry points used by visitors to engage with you. They can be customized to meet the needs of each area of your site.

Now you'll create your first chat button and generate a very important snippet of HTML code. You'll use the HTML code on your site to deploy chat; don't worry if you aren't ready for that step yet – you can also preview test chats from inside the Admin Center.

1. Go to **Channels > Chat > Chat Buttons (Floating)** and click **Create New**.
2. Name your chat button. As an example, we've named it *Test chat button*.

3. Select the **Chat Window** you just made (*Test chat window* in the example above).
4. On the left side of the page, click **HTML**.
5. On the HTML tab under **Website**, select the Test website you just created.
6. Click **Generate HTML**. You may be prompted to save your changes.
7. Click **Open test page**.
A test page is displayed.
You can click the chat button to launch the chat window and start a live chat session.
8. Once you are ready to deploy this on your own website click **Copy to clipboard**.
9. In a text or HTML editor, open your website HTML code, locate the last `</body>` tag, and paste the HTML snippet before the final `</body>` tag.

Tip: Grab a web developer if you need help with this part.

```

<!-- BoldChat Visitor Monitor HTML v5.00 (Website=Maria 9.25 Test,ChatBu
<script type="text/javascript">
window_bcvma = window_bcvma || [];
_bcvma.push(["setAccountID", "2307475884"]);
_bcvma.push(["setParameter", "WebsiteID", "192236466911526786"]);
_bcvma.push(["addFloat", {type: "chat", id: "1736420638803739"}]);
_bcvma.push(["pageViewed"]);
var bcLoad = function(){
  if(window.bcLoaded) return; window.bcLoaded = true;
  var vms = document.createElement("script"); vms.type = "text/javascript";
  vms.src = ("https:"==document.location.protocol?"https://":"http://") + "vmss-
  var s = document.getElementsByTagName("script")[0]; s.parentNode.inser
};
if(window.pageViewer && pageViewer.load) pageViewer.load();
else if(document.readyState=="complete") bcLoad();
else if(window.addEventListener) window.addEventListener("load", bcLoad
else window.attachEvent("onload", bcLoad);
</script>
</noscript>
<a href="http://www.boldchat.com" title="Live Chat Software" target="_blan
</noscript>
  
```

Need more info?
There's a [section about chat buttons](#) in our Help Center.

Add Agents and Departments

Add an Agent to Your Account

Set the agent's name, email and password; define channels they can use and choose languages they can support.

1. Go to **Organization > Agent management > Agents** and click **Create New**.

2. Name the agent and complete all required fields.

Tip: Hold your mouse over the info buttons for details about the fields.

3. **Save** your changes.

4. Log into the Agent Workspace at agent.bold360.com using this agent's details to confirm set up.

Agent permissions depend on their permission group which can be set in the **Security and Login** tab. [Learn about permission groups here.](#)

Need more info?
There's a [section about agent management](#) in our Help Center.

Create a Department

Departments are used to group agents and distribute chats and other work items. They inform your distribution strategy. They may or may not correspond to real departments in your organization. For example, set up departments to match your skills-based grouping of agents and work.

1. Go to **Organization > Departments** and click **Create New**.
2. Enter a **Name** for your Department.
3. You also can set a **Language** to route items to agents with appropriate language skills and set department-level **business hours**.
4. **Save** your changes.

Assign Agents to a Department

1. Go to **Organization > Agents** and find your agent.
2. On the Edit Agent page, go to the **Departments** tab.
3. Find and select your department name.
4. **Save** your changes.

Need more info?

There's a [section about department management](#) in our Help Center.

Customize Chat Windows and Buttons

Every business has its own unique voice and brand identity, and Bold360 gives you the control and flexibility to customize your implementation to your unique business needs.

Customize Your Chat Windows

1. Go to **Channels > Chat > Chat Windows**
2. Click on the name of your chat window to edit the chat window settings.
Select among the following options:
 - General
 - Pre-chat form
 - Post-chat form
 - Auto Answers
 - Message content
 - Agent wrap-up
 - Customization

Need more info?

There's a [section about chat window customization](#) in our Help Center.

Customize Your Chat Buttons

1. Click **Channels > Chat > Chat Buttons (Floating)**
2. Click on the name of your chat button.
3. Go to the **Settings > Display**
4. You can select among predefined images in our Button Template library or provide URL links to your own custom button images.
5. Scroll down to the **Positioning** section to select where your chat button is displayed on your web page and how it will animate when shown to the visitor.
6. **Save** your changes.

Display

IMAGE SOURCE

Predefined options

Custom

WHEN UNAVAILABLE

Show unavailable button

AVAILABLE CHAT URL

https://yourcustomlocation/graphics/fancy.png

UNAVAILABLE CHAT URL

https://yourcustomlocation/graphics/morefancy.png

Need more info?

There's a [section about chat button setup](#) in our Help Center.

Create Canned Messages

With canned messages, agents can quickly respond to frequently asked questions with prepared responses without having to type them, ensuring a consistent experience and faster response times for customers and prospects.

Canned messages are managed separately by channel (Chat, Email, Messaging, Social).

Here's how to set up canned messages for chat:

1. Go to **Channels > Chat > Canned Messages** and click **Create New**.

New Canned Message

Setup / Channels / Chat / Canned Messages

View and edit your Canned Message details.

NAME
Hello greeting

SUBJECT
Ignore this for now

BODY
HTML Plain Text Only
Hello, how may I help you today?
p

LANGUAGE
English

KEYWORDS

SHORTCUT
/ hello

2. Name and identify the message so agents can find it.
3. Type and format the message.
4. Set a “slash command” shortcut for your new message (for example: “/hello”).
5. **Save** your changes.

Your new canned message is now available for responses to incoming chats.

Need more info?
There's an [article about canned messages](#) in our Help Center.

Set Up an Invitation

There are a few ways to invite visitors to chat. The following steps outline how to set up a rules-based invitation to a chat conversation.

Create an Invitation

First, create an invitation. This is the actual interface the visitor sees when invited.

1. Go to **Visitors > Custom Invitations** and click **Create New**.
2. **Name** the invitation (for example, *Test Invitation*).
3. **Save** your changes.

Create New Chat Invitation

Setup / Customers / Chat Invitation

General

Parameters
Advanced (HTML)
Mobile

NAME
Test invitation| 2

INVITE TYPE
Simple Image

Need more info?
There's an [article about customizing chat invitations](#) in our Help Center.

Create an Invitation Rule Set

Second, create an **Invitation Rule Set**.

1. Go to **Visitors > Invitation Rule Set** and click **Create New**.
2. Enter a **Name** that will help you identify the rule set.
3. Select the **Enable** box to activate the rule set.
4. Scroll to the bottom of the page click **New Rule**.
5. **Name** the rule.
6. Click **Add Criteria** and select an option from the drop down list.

The screenshot shows the 'Create Invitation Rule Set' form. At the top, there is a 'NAME' field containing 'Test rule set' with a red circle '2' next to it. Below this is an 'Enable' checkbox with a red circle '3' next to it. Under the 'Rules' section, there is a 'New Rule' button with a red circle '4' next to it. A rule named 'test rule' is expanded, showing a 'NAME' field with 'test rule'. Under the 'Criteria' section, there is an 'Add Criteria' button with a red circle '5' next to it. Below this, the 'Entry Uri' is set to 'contains' with a dropdown menu and a text box containing 'yoursite.com/special'. Under the 'Actions' section, there is an 'Add Action' button with a red circle '6' next to it. Below this, the 'Activate custom invite' is set to 'Test invitation'.

7. Click **Add Action** and select **Activate Custom Invite** from the drop down list.
8. Search for and select the rule you just created.
9. **Save** your changes to add your rule to the rule set.

Associate the Rule Set with Your Chat Button

Finally, **associate the rule set with your chat button** and HTML snippet.

1. Go to **Channels > Chat > Chat Buttons (Floating)** and click on the name of the chat button you created.
2. On the left side of the Edit Floating Chat Button page, click **HTML**.
3. Select the rule set you created from the **Auto-Invite Ruleset** drop down menu.

The screenshot shows the 'Edit Floating Chat Button' form. At the top, there is a breadcrumb trail: 'Setup / Channels / Chat / Floating Chat Buttons'. Under the 'Settings' section, there is an 'HTML' button with a red circle '2' next to it. Below this, there is a 'WEBSITE' dropdown menu with '-None-' selected. Under the 'AUTO-INVITE RULESET' section, there is a dropdown menu with 'Test rule set' selected and a red circle '3' next to it. Below this, there is a checkbox for 'Pass custom visitor information'. At the bottom, there is a 'Generate HTML' button with a red circle '4' next to it and a 'Copy to clipboard' button.

4. **Save** your changes and click **Generate HTML**.
5. Follow the instructions on how to [test your chat button](#).

Need more info?
There's a [section about invitations and rules](#) in our [Help Center](#).

Add Additional Channels

With omni-channel engagement, Bold360 brings together the digital channels most important to your business, including email, Facebook Messenger, and text messaging.

Add Email

Configure Bold360 to receive, track, and manage emails.

1. Go to **Channels > Email > Email Accounts**.
2. Click **Create New**.
3. Select **Enable email** to activate the email account on the **New Email Account** page.

4. Under **General**, enter basic account settings such as sender email address and incoming/outgoing server details.
5. Under **Distribution – Organization**, you can set the controls for how emails are distributed and organized.
6. Under **Format and content**, set up how emails are encoded and formatted; set up an email footer; select canned messages for use with email.
7. **Save** your changes.

Need more info?
There's an [article about email setup](#) in our [Help Center](#).

New Email Account

Setup / Channels / Email / Email Accounts

General
Distribution - Organization
Format and content

Enable email

CONFIGURATION NAME

Sender identity

SENDER EMAIL ADDRESS

FRIENDLY SENDER NAME

Add Facebook Messenger

Similar to chat functionality, the Facebook Messenger service supports department-based routing, hours of availability, post-chat wrap-up, and canned messages, as well as an auto-response feature to help you manage incoming requests.

1. Go to **Channels > Messaging > Facebook Messenger Acct** and click **Create New**.
2. **Name** the account.
3. To connect Facebook to Bold360, click the **Log In** button showing the Facebook logo.
4. You are prompted to enter your Facebook account details.

Tip: If you are using a custom app approved by Facebook to manage FB Messenger, click **Show Advanced Setup** and enter details as required (App ID, App Secret, Access Token, Webhook URL, Token).

5. Once you have signed in to Facebook, select the page to use.
6. On the **Auto Responder** tab, you can configure how you want to automatically respond to incoming messages.

Important: We recommend using **Create Email Prompt Rules** to create a set of rules that automatically asks the visitor to enter their email address. The visitor's email allows Bold360 to connect the visitor to their Bold360 history across all channels (chat, email).

7. **Save** your changes.

Need more info?
There's an [article about Facebook Messenger setup](#) in our [Help Center](#).

New Facebook Messenger Account

Setup / Channels / Messaging / Facebook Messenger Accounts

Account Settings

Auto Responder

Wrap Up


Canned Message Folders

NAME


Required

FACEBOOK ACCOUNT SETUP


[Show advanced setup](#)


 **Log In**


DEPARTMENT


<None> 


AUTO-END INTERVAL

< 30 > Minutes 

Original agent retains ownership of re-opened conversations 

Original agent must re-accept re-opened conversations 

Original agent must always re-accept conversations, even if open 

BUSINESS HOURS 

Enable business hours

Add Text Messaging

To implement text messaging functionality, you must configure an SMS account and provision a phone number to integrate with Twilio, our SMS gateway provider. Additional per message fees apply.

Bold's text messaging service supports department based routing, hours of availability, post-chat wrap-up, and canned messages, as well as an auto-response feature to help you manage incoming message requests.

1. Go to **Channels > Messaging > SMS Acct.** and click **Create New**.
2. Within the **Account Settings** tab enter the account Name and associate incoming text

messages with a Department. Within this tab, you can define when to automatically end a session if a consumer has not responded within a defined period and how to handle re-opened text message threads.

3. Under **Auto Responder**, configure how you want to automatically respond to incoming messages.
4. Under **Wrap Up**, configure how you want to gather information from agents about ended sessions.
5. Under **Canned Message Folders**, select the canned messages that you want to make available to agents handling this account.

New SMS Messenger Account

[Setup](#) / [Channels](#) / [Messaging](#) / [SMS Accounts](#)

Account Settings

Auto Responder

Wrap Up

Canned Message Folders

Phone Number

NAME

Required

DEPARTMENT

<None>

AUTO-END INTERVAL

< 30 > Minutes

THREAD OWNERSHIP

Maintain thread ownership on new conversations

Require that the operator be available and answer the conversation

Require even when the conversation was left open by the operator

BUSINESS HOURS

Enable business hours

6. Under **Phone Number** tab, choose your **Country** and click **Find Phone Number**.
Select your phone number from the available local phone numbers in the drop down menu.
7. Click **save**.

New SMS Messenger Account

Setup / Channels / Messaging / SMS Accounts

- Account Settings
- Auto Responder
- Wrap Up
- Canned Message Folders
- Phone Number**

COUNTRY

- Hungary (HU) (+36)
- Select One...
- Australia (AU) (+61)
- Belgium (BE) (+32)
- Canada (CA) (+1)**
- France (FR) (+33) - (Domestic SMS Only)
- Hungary (HU) (+36)
- Ireland (IE) (+353)
- Israel (IL) (+972)
- Norway (NO) (+47)
- Poland (PL) (+48)
- Portugal (PT) (+351)
- Spain (ES) (+34) - (Domestic SMS Only)
- Switzerland (CH) (+41)
- United Kingdom (GB) (+44)
- United States (US) (+1)

NOTE: Additional countries are available through the Advanced Set up link. Due to various regulatory requirements, these countries must be provisioned directly through Twilio. Once provisioned, the Administrator can select Advanced Setup to enter the number, secure toke, etc that Twilio provides and then selects the country from the Advanced Setup drop down menu.

New SMS Messenger Account

Setup / Channels / Messaging / SMS Accounts

- Account Settings
- Auto Responder
- Wrap Up
- Canned Message Folders
- Phone Number**

COUNTRY

Australia (AU) (+61)

Show basic setup

TWILIO ACCOUNT SID

Required

TWILIO AUTH TOKEN

Required

PHONE NUMBER

427338959