

Managed Chat and Boss Mode

The Benefits of Managed Chat and Boss Mode for Conversations

Through your website development process all the way through your continued journey post go-live, our goal is to equip you with the necessary tactics to create a pro website and offer industry-leading.

Before diving in, let's understand what Managed Chat and Boss Mode means in Conversations:

Managed Chat

Using Managed Chat means internal chats can roll over to a call center agent if an internal agent cannot answer. Managed Chat in the backend of Conversations is where you can create rules for when and how the call center fields chats.

Boss Mode

Boss Mode allows Admin users to view and overtake live chats from other internal Agents and from call center agents. This offers Admins the opportunity to step in and successfully direct a conversation.

If using Managed Chat services, you will see Managed Chat listed in the Account Administration bar in the backend of Conversations in your Account Admin section.

In Managed Chat, you have the ability to enable, disable or deactivate policies or rules. The Always Rollover function signifies that chats with this enabled will roll over to the Call Center. Hybrid means Agents can accept the chat, but after a certain amount of time passes, only then will the chat roll over to the Call Center.

You can assign those policies or rules to apply to various teams or departments and create new messages that the Call Center will output to saved contacts. You can create messages of unexpected closures due to weather, a change in holiday hours, and more. You can also create a subject and set an expiration date for your message if it is time sensitive.

Next up: Boss Mode

Account Administration

- Users
- Locations
- Teams
- Hotkeys
- Glove Compartment
- Inventory Feeds
- CRMs
- Managed Chat**
- Embed Snippets
- Embed Starters
- Embed Banners
- Embed Links
- Visitor Experience

More of a visual learner? Watch our **Managed Chat and Boss Mode** video below:

Watch

Have questions? Reach out to support@dealerinspire.com or trainers@dealerinspire.com



Managed Chat and Boss Mode

The Benefits of Managed Chat and Boss Mode for Conversations

Let's take a look at the Boss Mode feature.


Reporting

- Dashboard
- Sold Customers
- Summary
- Conversation History
- Live Agent Status
- Active Chats

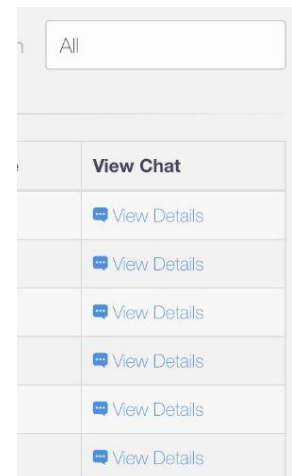
Boss Mode allows Admins to take over active chats from Call Center Agents and internal dealership Agents. To utilize the Boss Mode function, click on Active Chats under the Reporting section of the Account Admin settings of Conversations.

Once you are on your Active Chats page, you can click into View Details on the far right column.

By clicking View Details in the Active Chat you'd like to takeover, you will see the current chat in real-time. To takeover the chat click on the red Takeover Chat button and Confirm.

The customer and your Agent or Call Center Agent will be notified that you have entered the chat. At this point, the Agent is still a part of a three-way chat, but can leave by clicking the  in their chat box.

The Admin who took over the chat and the customer will remain in the active chat.



The Managed Chat and Boss Mode features offer flexibility and efficiency when it comes to how and when your chats are answered. As an admin, you can manage and create your ideal customer chatting experience within Conversations – both in how your call center responds to active chats, and how you can jump in to help facilitate a chat with a potential lead!

What is your favorite feature of Managed Chat or Boss Mode?

More of a visual learner? Watch our **Managed Chat and Boss Mode** video below:

Watch

Have questions? Reach out to support@dealerinspire.com or trainers@dealerinspire.com

