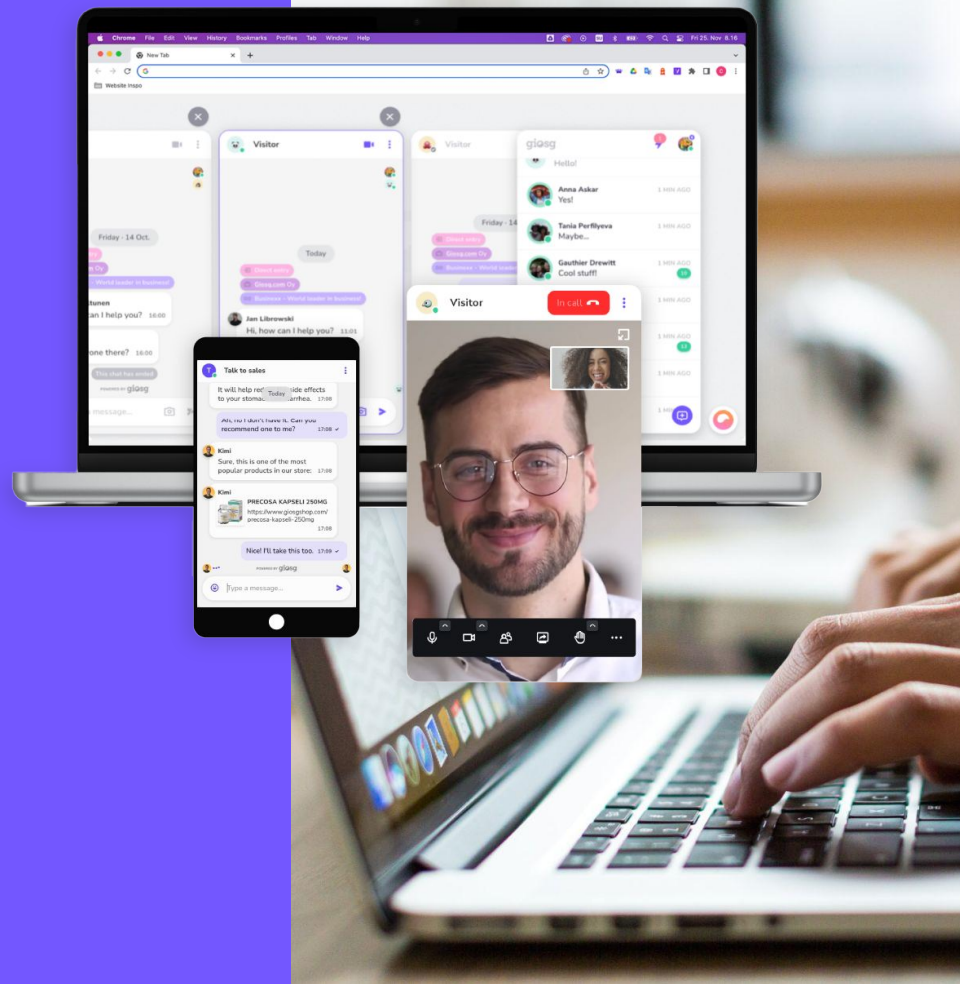




Giosg guide for agents

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



Content

1 Best practices

- 1.1 **Tips for chatting**
- 1.2 **Tips for Video calls**

2 Giosg for Agents

2.1 **Getting started**

- Logging in
- Allowing push notifications
- Profile settings

2.2 **Using giosg**

- Overview
- Internal chats

2.3 **Chatting**

- Go online and start serving your customers
- Additional statuses
- Respond to incoming chats
- Leaving a chat
- Visitor information

1.4 **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

1.5 **Video calls**

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

3 Mobile app

Using giosg on your mobile

1

Best practices

Tips for Chatting
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

“
It is important 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 or use AI reply suggestions.
 - Share links for additional information.

1 Best practices

Tips for chatting: Serve with the right style

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.

- **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.

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 for Agents

Getting started
Using giosg
Chatting
Chat features
Video calls



2 Giosg for Agents

2.1

Getting started

Logging in
Allowing push notifications
Profile settings

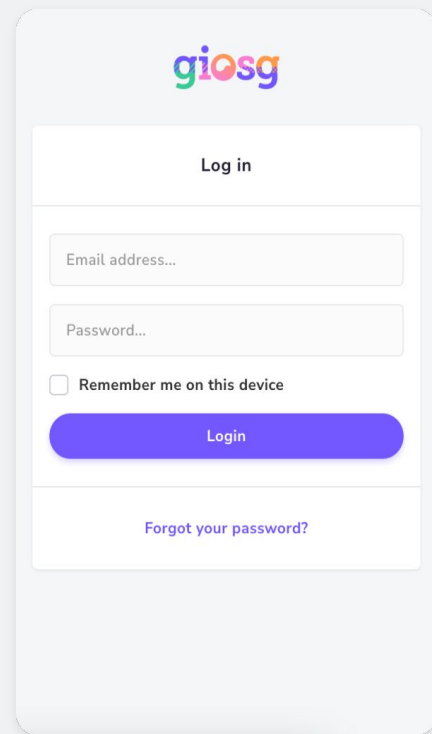


2 Giosg for Agents

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 screenshot shows a mobile-style login form for Giosg. At the top is the Giosg logo. Below it is a white box with the title "Log in". Inside this box are two input fields: "Email address..." and "Password...". Below the password field is a checkbox labeled "Remember me on this device". A large blue button labeled "Login" is positioned below the checkbox. At the bottom of the white box is a link that says "Forgot your password?".

2 Giosg for Agents

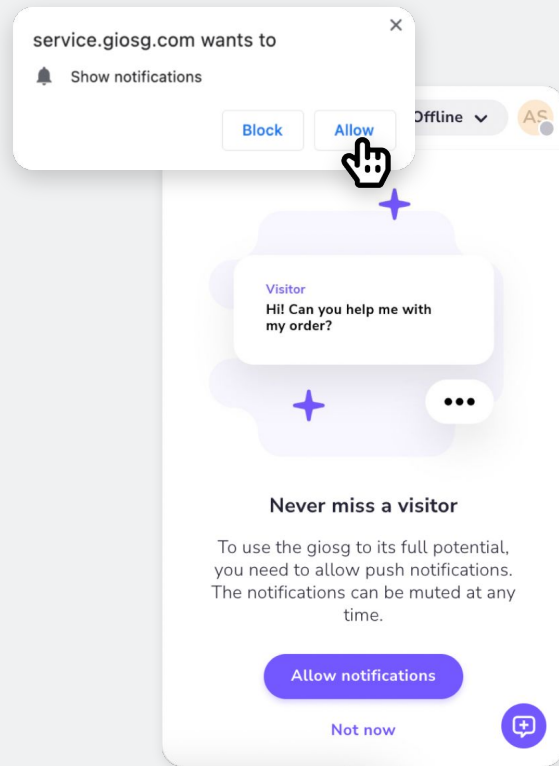
Getting started

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.

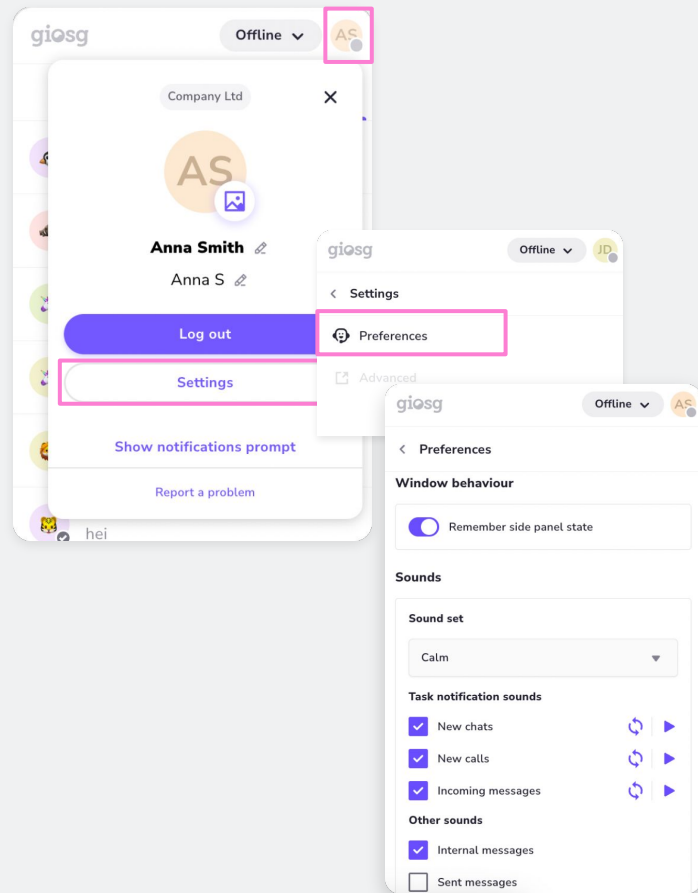


2 Giosg for Agents

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 for Agents

2.2

Using giosg

Overview

Internal chats

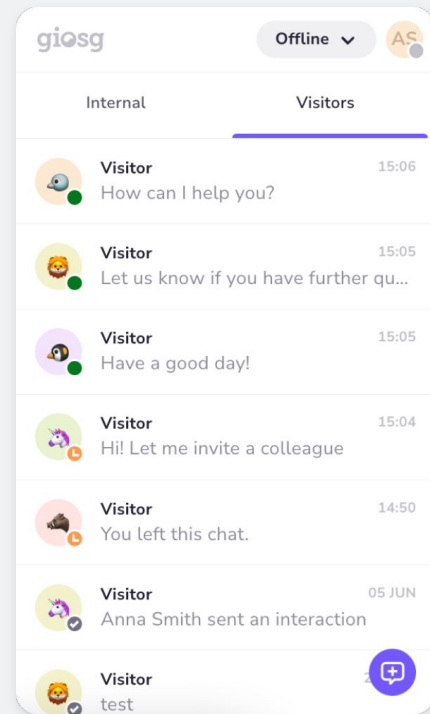
2 Giosg for Agents

Using giosg

Overview

In the Visitors tab, you can see a list of chat conversations that you've had with your website visitors. Calls will also show here if you're using them.

From the top of the list, you can change your status (offline/online). By clicking your profile picture at the top right corner you will be able to log out and access your profile settings.

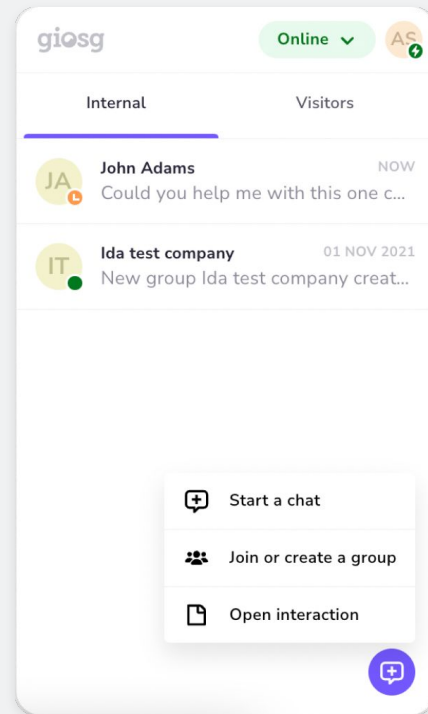


2 Giosg for Agents

Using giosg

Internal chats

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



2 Giosg for Agents

2.3

Chatting

Go online and start serving your customers

Respond to incoming chats

Leaving a chat

Visitor information



2 Giosg for Agents

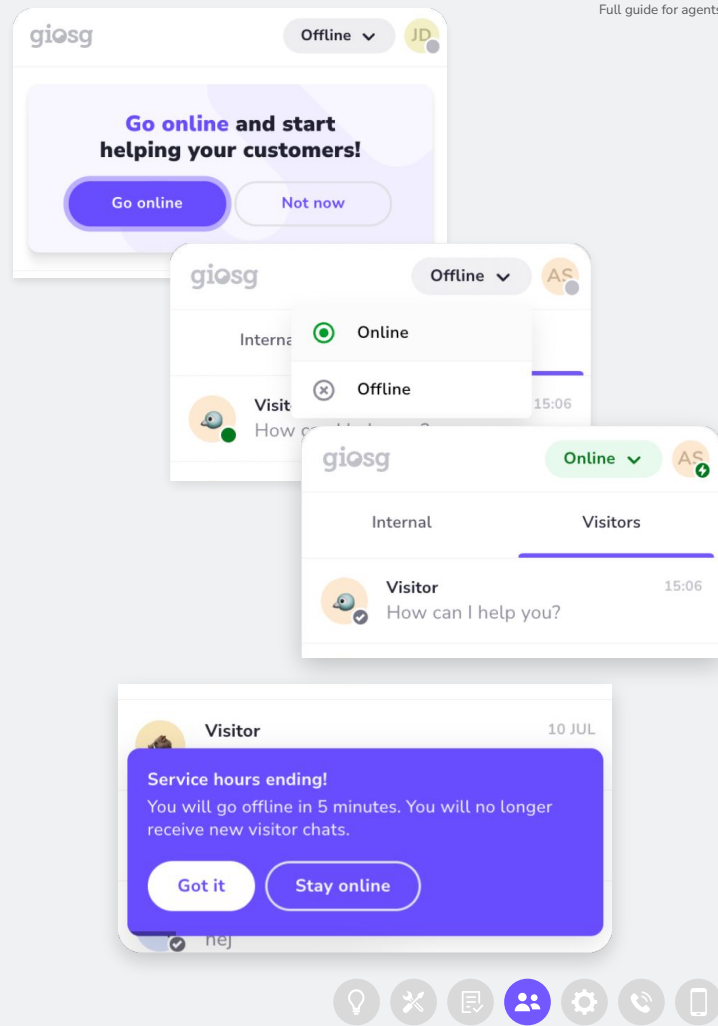
Chatting

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.



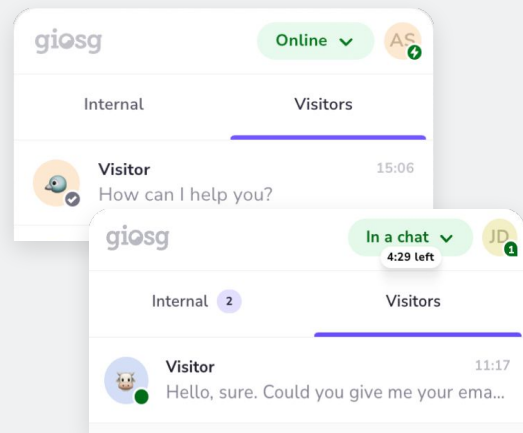
2 Giosg for Agents

Chatting

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”



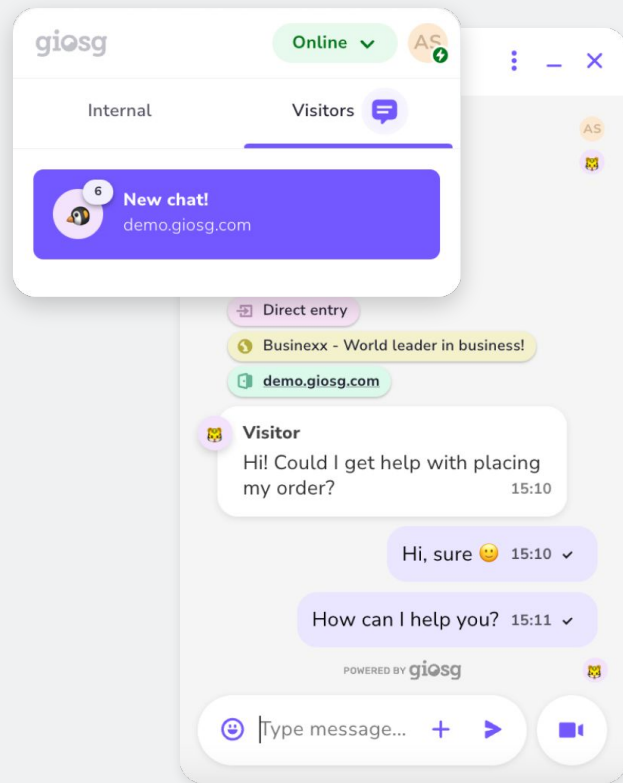
2 Giosg for Agents

Chatting

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.



2 Giosg for Agents

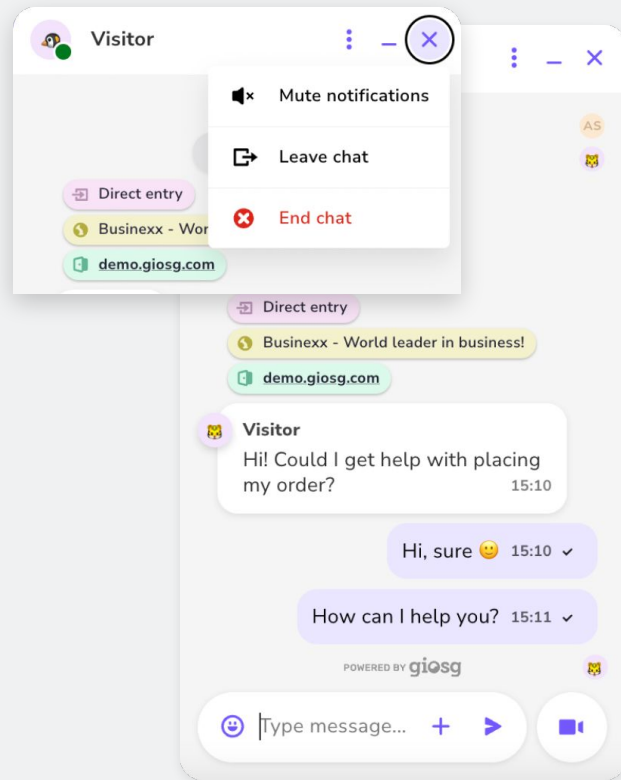
Chatting

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.



2 Giosg for Agents

Chatting

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**.

The screenshot displays the Giosg chat interface. At the top, a 'Today' header is followed by several 'pills' representing visitor data: 'Direct entry', 'Businessx - All products', '1399.00 EUR', and 'demo.giosg.com'. Below this, a chat window titled 'Visitor' is open. A menu is visible over the chat, with 'Visitor information' highlighted in a pink box. Other menu items include 'Manage tags', 'Manage members', 'Report a problem', 'Ban visitor', and 'Delete visitor data'. The chat messages show a visitor asking 'How can I help you?' and another message from the visitor: 'I have a question about my invoice.' The interface is powered by Giosg. To the right, a 'Visitor information' panel is open, displaying the following details:

Visitor information	
Basic information	
COMPANY	Telia Finland Oyj
REFERRER	Direct entry
ROOM	demo.giosg.com
BROWSER	Chrome 126.0.0
DEVICE	Mac OS X desktop
Visits	
1 DISTINCT VISITS	00:04:48 TIME ON SITE

2 Giosg for Agents

2.4

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



2 Giosg for Agents

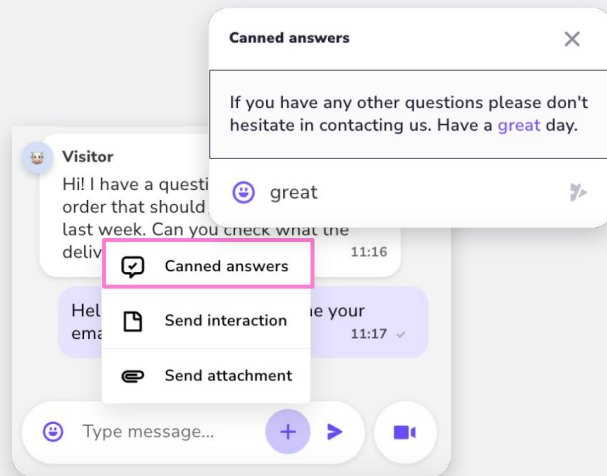
Chat features

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).



2 Giosg for Agents

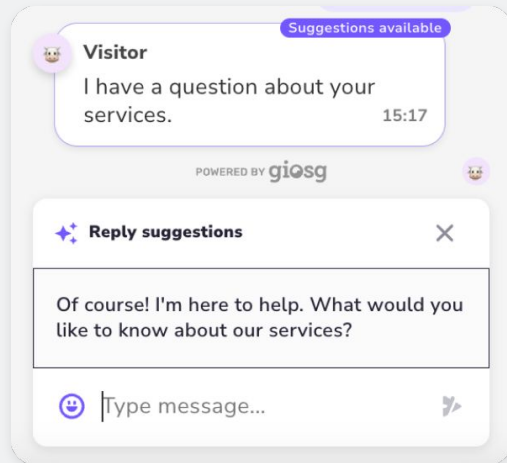
Chat features

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.

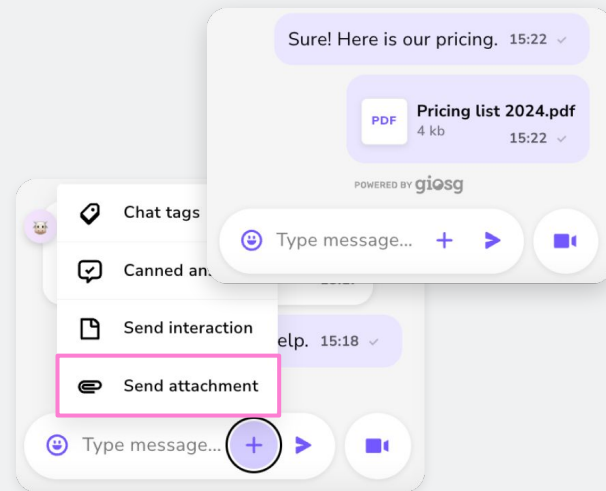


2 Giosg for Agents

Chat features

File sharing

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




2 Giosg for Agents

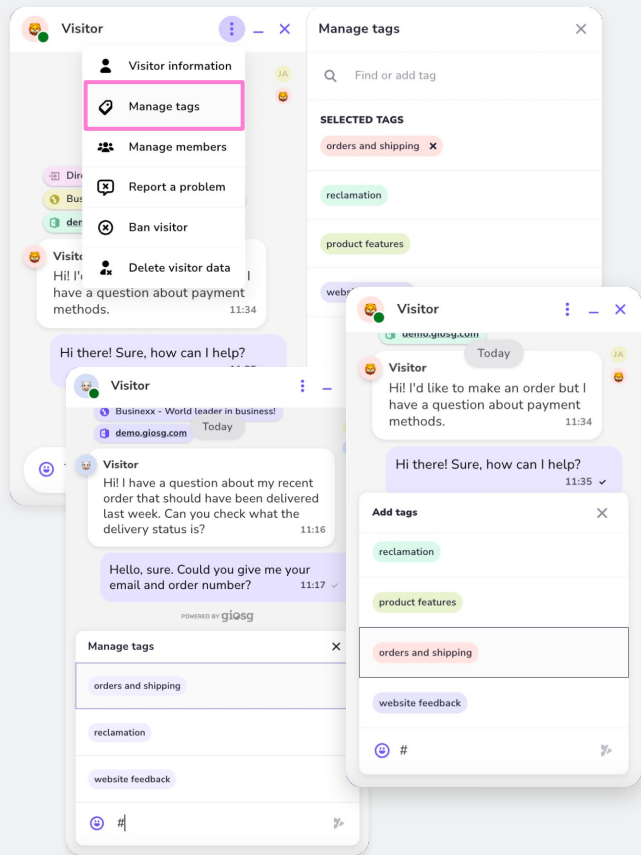
Chat features

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.



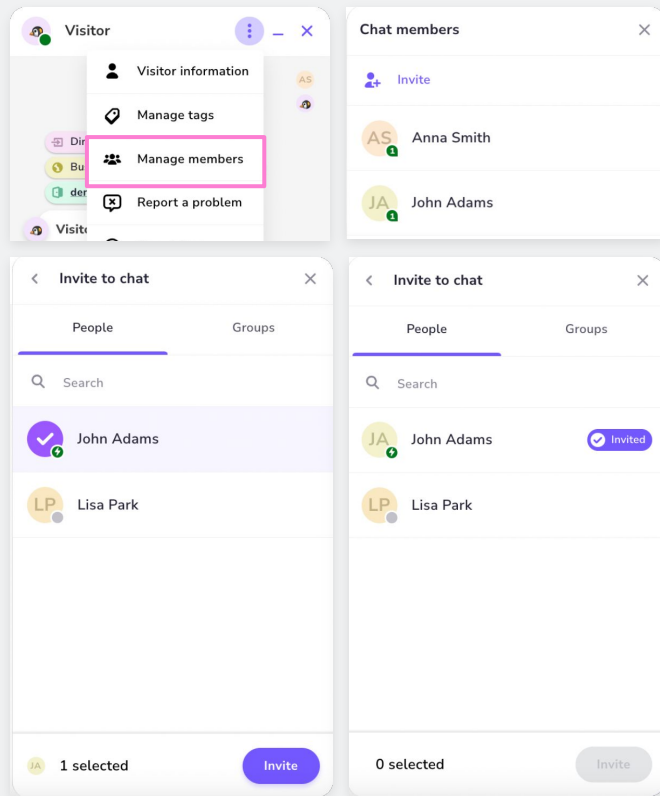
2 Giosg for Agents

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.

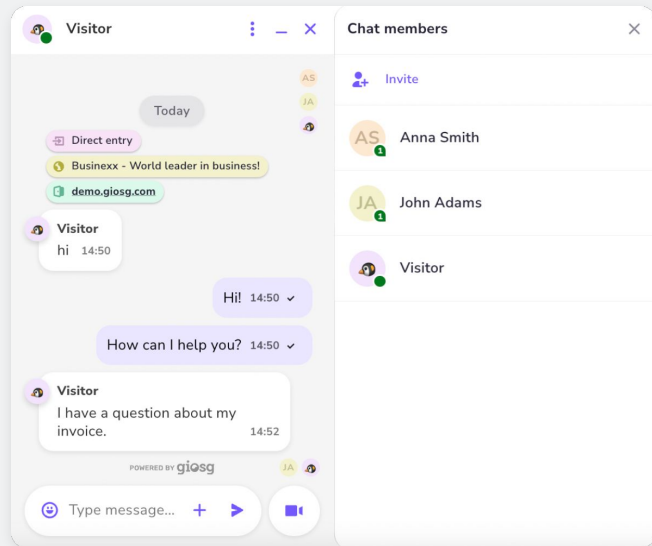
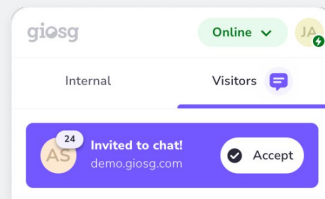


2 Giosg for Agents

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.**



2 Giosg for Agents

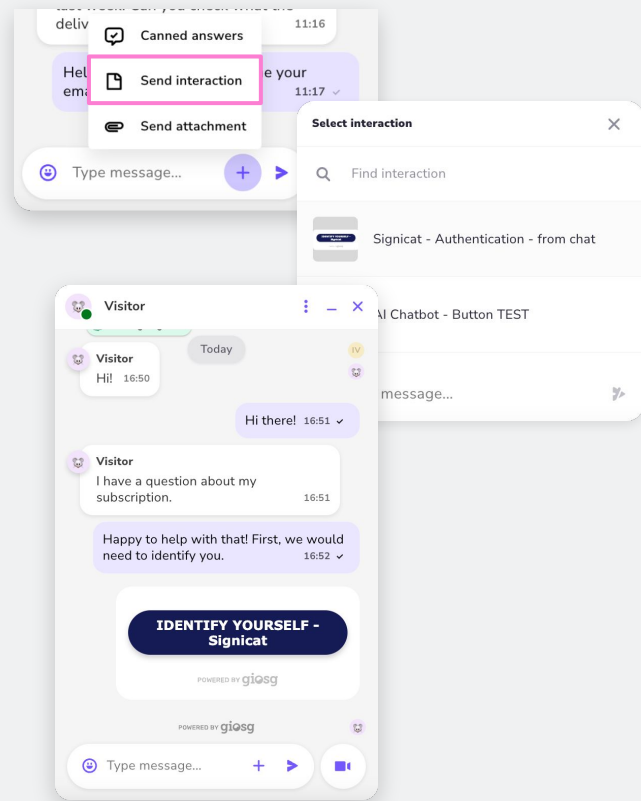
Chat features

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.



2 Giosg for Agents

Chat features

Other features

Report a problem

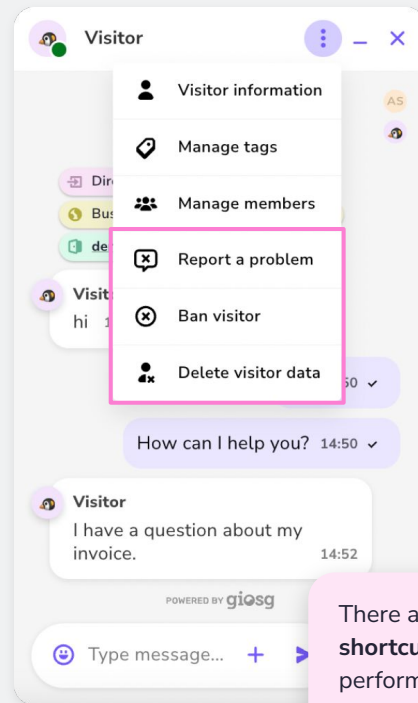
If there's a technical issue in the system, you can report it to giosg support by sending a problem report.

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.



2 Giosg for Agents

2.5

Video Calls


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



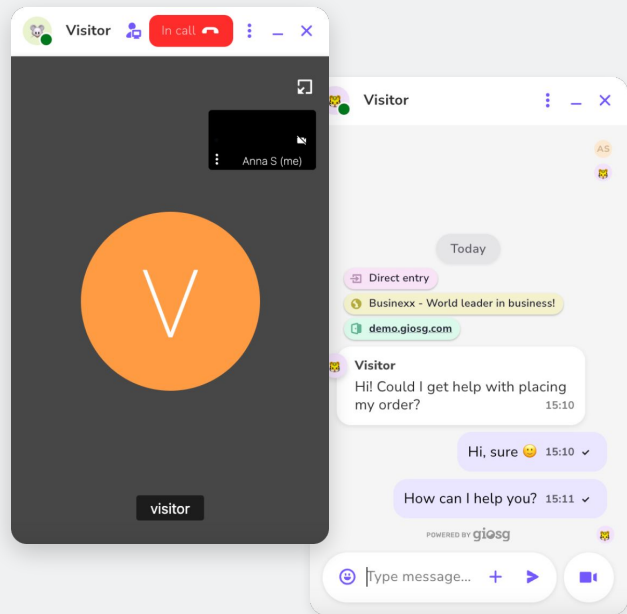
2 Giosg for Agents

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.



2 Giosg for Agents

Video Calls

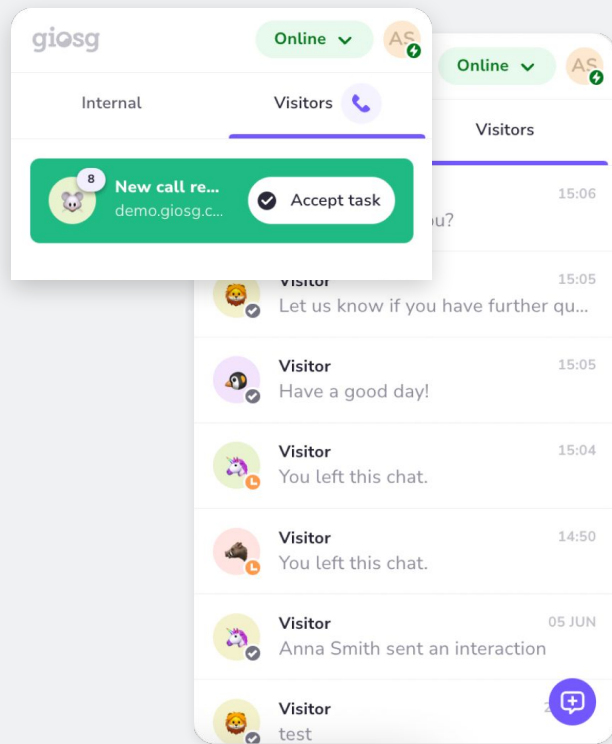
Receiving an incoming call

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.



2 Giosg for Agents

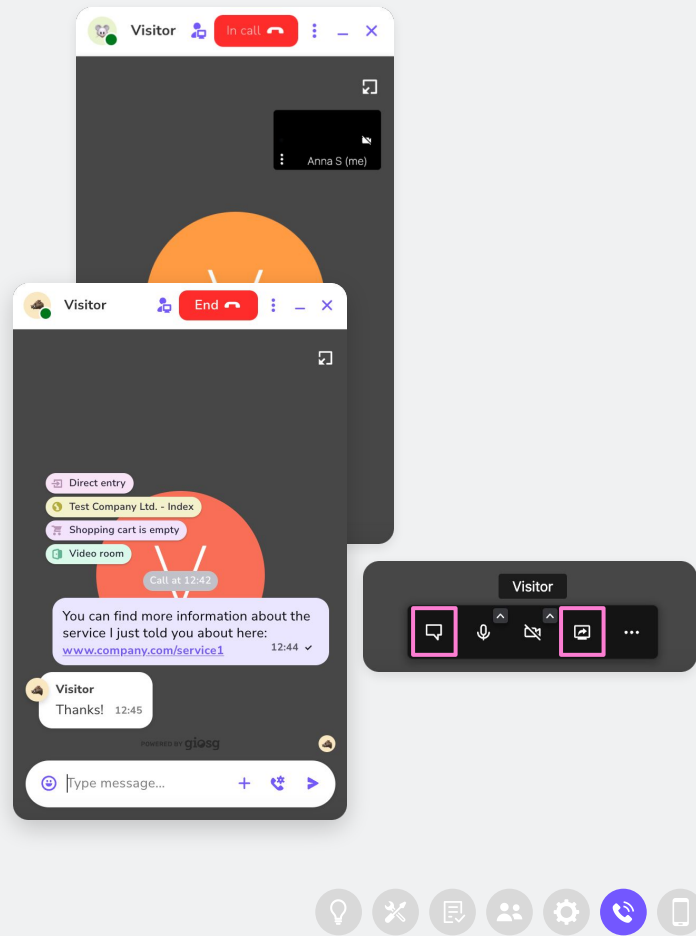
Video Calls

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.

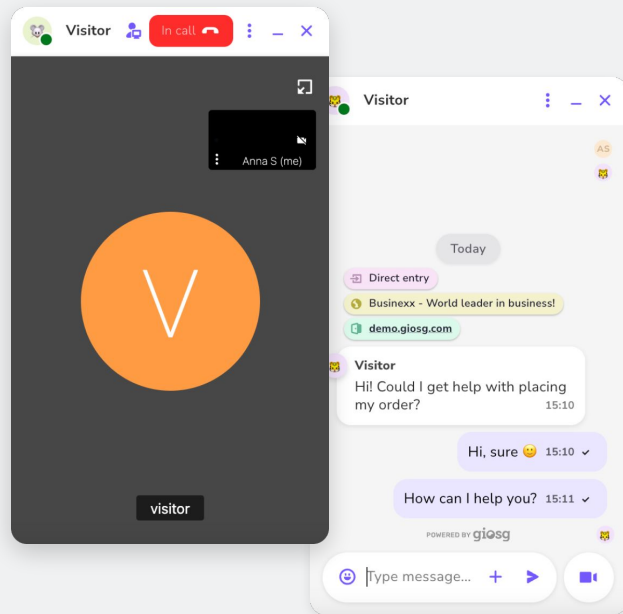


2 Giosg for Agents

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.



3

Mobile app

Using giosg on your mobile



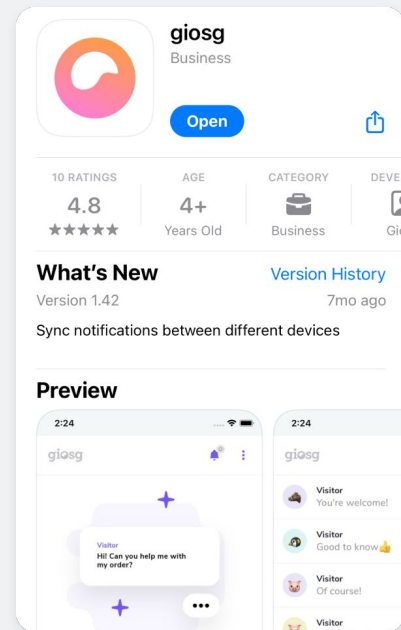
3 Mobile app

Using giosg on your mobile

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.



3 Mobile app

Using giosg on your mobile

Logging in and allowing notifications

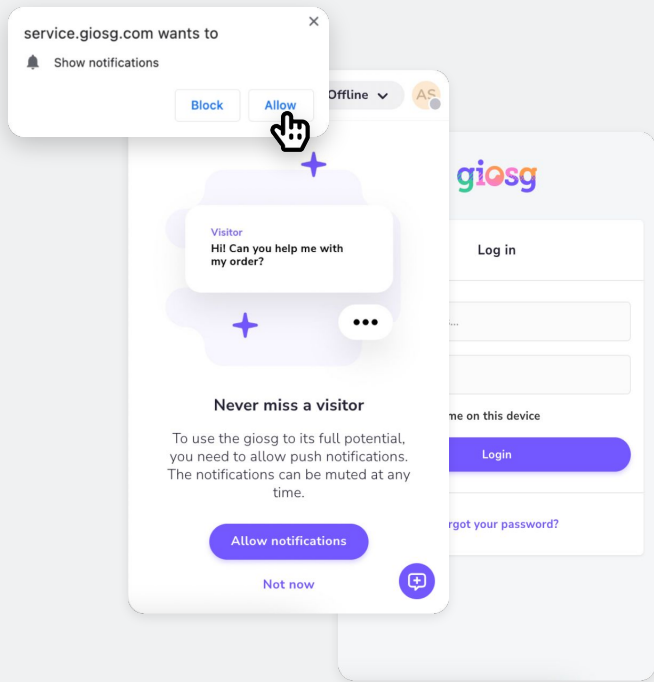
Launch the giosg app and log in with your giosg credentials.

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



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