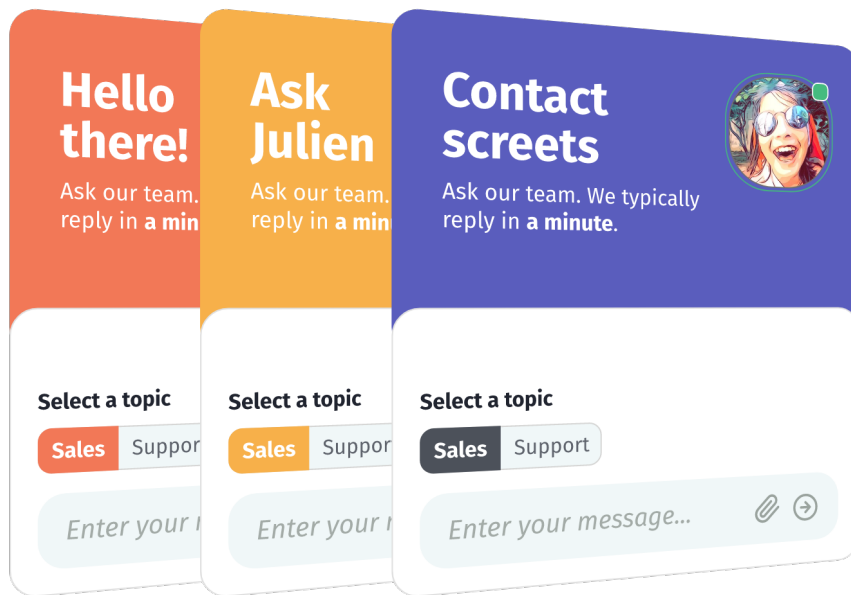


# screets Chat Docs

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Please visit [docs.screets.io](https://docs.screets.io) for the most up-to-date documentation.



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## Introduction

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screets Chat is a new **chat widget** — that helps you build relationships with your customers through your website.

You can install **Chat** on:

- HTML
- PHP
- WordPress

## Getting started

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The fastest way to get your chat widget on your website is to go to [chat.screets.io](https://chat.screets.io), create a new account and follow instructions.

## Installation

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Getting your beautiful chat widget is just a few clicks away:

1. Go to [chat.screets.io](https://chat.screets.io)
2. Sign in with one of providers like Envato, Google.
3. If you don't have an account yet, Chat will redirect you to create a new account page:



**You are about to connect your Envato account with screets.**

4. Now fill all required fields:

- (!) **Select a region:** Select one of available regions. It's where your cloud data will be stored (i.e. chats, users and images). As mentioned in the setup, we recommend you to choose the one legally eligible or where your target clients are located.

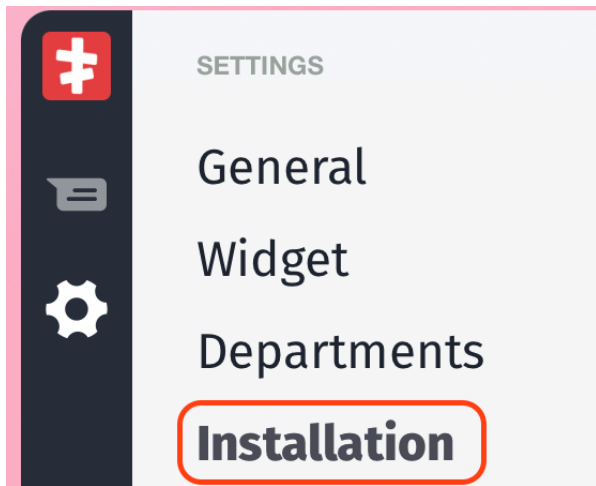
WARNING! You may **NOT be able to transfer** your data to another region at the moment (i.e. from Newark to Tokyo). We'll work on migrating data between regions for the future updates.

- **Site domain:** Your domain URL without prefix. For instance, *yourdomain.com* (you can change it later)
- **Site name:** Your site name (you can change it later)
- **Operator name:** That name will present you to your visitors and other teammates (you can change it later)
- Finally accept terms of usage
- Click "Create first app" button

Now Chat creates a new account for you and redirects you to the chat console.

Chat won't store any data of you on screets Cloud until you click "Create first app" even though you gave permission before through one of providers like Envato, Google.

5. Click "Settings" icon on admin bar and "Installation"



Now you can follow instructions on the page.

## Add Chat to your website

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Add screets Chat widget on different platforms. Currently supported only HTML, PHP and WordPress.

### HTML

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If you've a website with multiple pages where each one triggers a new page refresh, then you'll most likely need the basic JavaScript method.

#### Before you begin!

Ensure you've created your first application on screets Cloud. See "Installation" section above.

To get chat widget on your website, simply copy and paste the snippet below before the `</body>` tag on every page where you want the chat widget to appear for website visitors.

```
<script>
window.screetsxi = {
  appid: "APP_ID",
};
(function(){var w = window;var i = function() { i.c( arguments ); };i.q = []; i.
</script>
```

#### Tip

You can find **APP\_ID** on "Installation" settings page in your chat console.

# WordPress

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Installing the Chat on your WordPress is simple.

You'll want to:

- First, go to [Downloads page](#) (Envato)
- Find the **screets Chat** item and click Download > "Installable WordPress file only"
- Now go to your WordPress dashboard > Plugins > Add new > Upload page
- Upload the zip file you've just downloaded
- Click "Activate"

## Connect your WordPress

Because Chat comes with an embedded chat console inside of your WordPress admin panel, you need additional security layer.

- Go to Settings > Chat
- Click "**Connect**" button
- You'll be redirected to the confirm page about your WordPress admin:

Please confirm the following URL is your WordPress admin address:

`https://mydomain.com/blog/wp-admin/`

**Confirm**

Cancel

→ You'll redirect to the **Sign in** page.

- Click "**Confirm**" if it's your WordPress admin URL
- Now you can sign in with one of providers (i.e. Envato, Google). If you don't have an account, you'll be asked to create one:

## Sign-in with your account



Continue with Envato



Continue with Google

- If you don't have an account or any application yet, you'll be asked to **"Create first app"**. This page will also create an account on screets:

### Set a location

Your location setting is where your cloud data will be stored (i.e. chats, users and images). It is better to choose where your target clients are located.

### Select a region

☒ Newark, USA

- Click **"Create first app"** to complete setup. If you click "Cancel", none of your data will be saved onto screets server and you'll be forgotten immediately

**Create first app**

Cancel

- If everything is OK, you should be redirected back to your WordPress Chat settings page and see "Connected" notification:

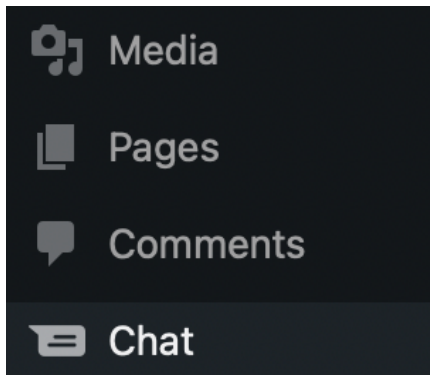
### screets Cloud

Connect your application with screets Cloud.

✓ **Connected**

Disconnect

- That's all 👍 Now you can go to chat console by clicking **"Chat"** menu item on your admin menu.



# Chat Console

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Chat has an advanced, yet simple console.

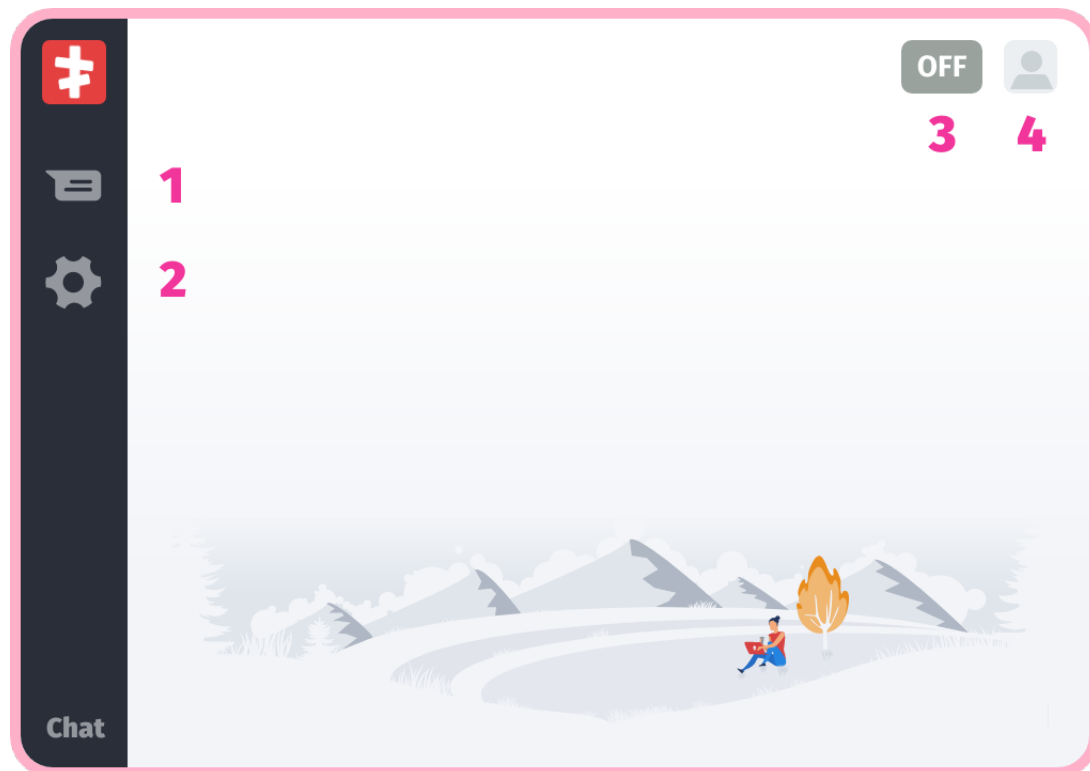
- No server setup is required
- Simple to use
- Updated automatically

Go to console: [chat.screets.io](https://chat.screets.io)

## Built-in console for WordPress

Chat also offers built-in console for WordPress users. You can chat with your visitors through your WordPress admin panel. To access all features, you'll want to use [chat.screets.io](https://chat.screets.io).

Console has powerful and easy-to-use interface.



[1] Inbox

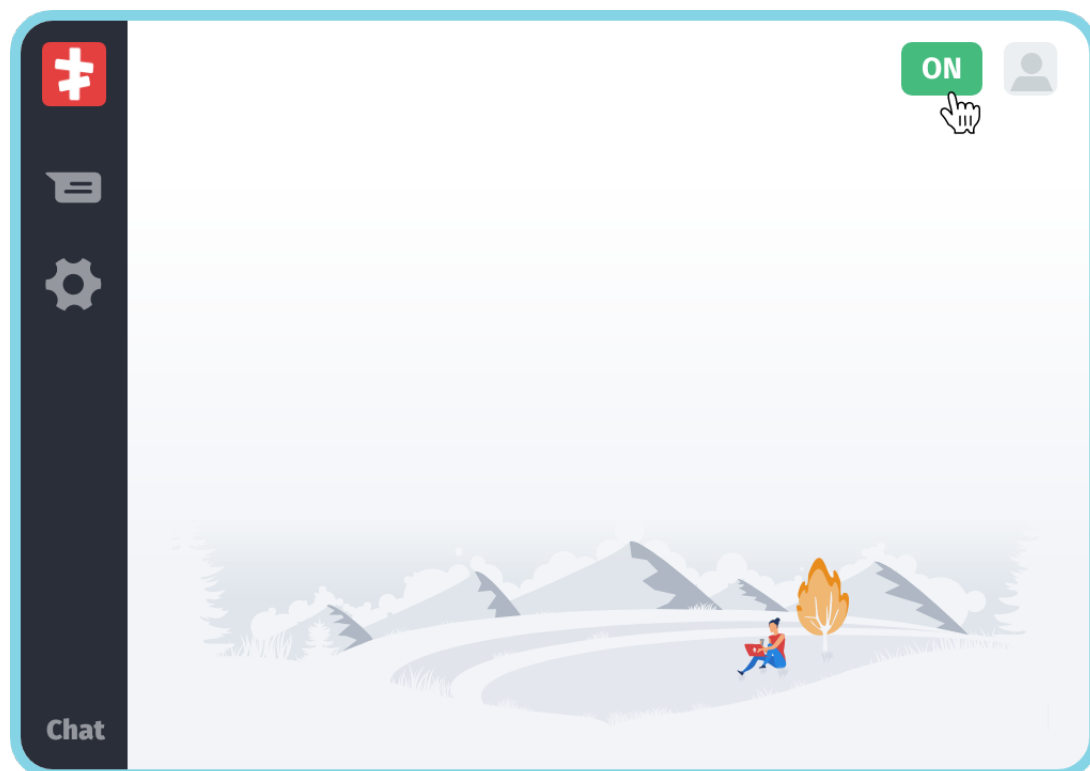
[2] Settings

[3] Go online and offline

[4] User profile

## Set your status

To go online, simply click "On/Off" switcher:



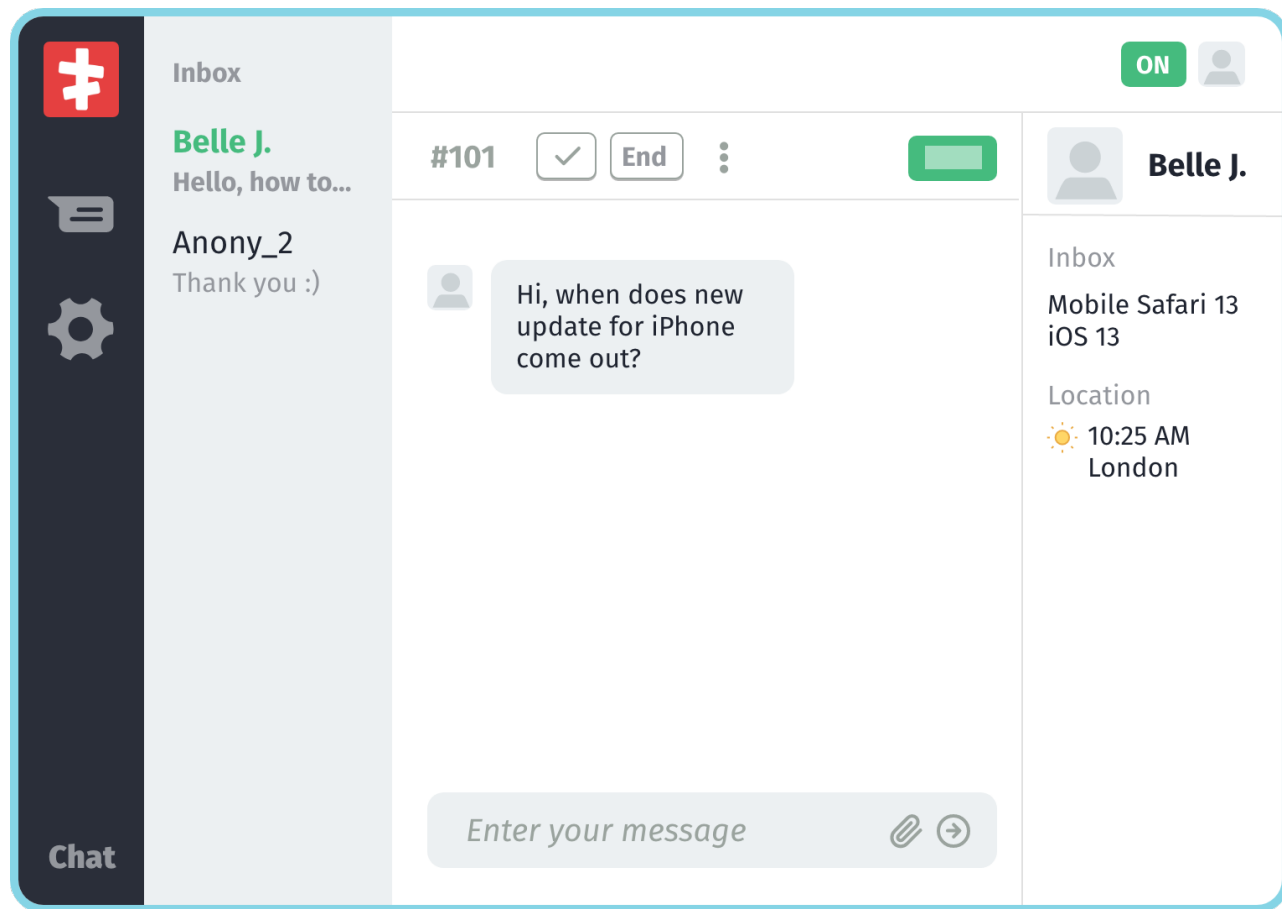
## Tip

When you are "**ON**", you will be seen as online on chat widget by visitors.

# Inbox

Inbox workflows help you resolve issues in real time with your team. You can provide your users and visitors with simple and personal support. screets Chat offers a suite of features for your team to handle conversations like a traditional ticketing system.

It's designed for everyone.



## Inbox: Accepting chat

No one is assigned to new conversations, so you see **Accept chat** button on composer.

If you write your reply and click "Accept Chat" button:

- you'll be automatically assigned to the conversation
- your first message appears on conversation
- your name and profile picture will be immediately seen by the visitor on the chat widget

Enter your message



Accept chat

### Tip

When you assign to a conversation, **you will receive notifications** about the conversation, not other teammates (i.e. "x replied").

## Inbox: Chat statuses

A status is a quick look about the current status of the conversation:

- **Active** Listed on inbox sidebar (it means it still needs attention)
- **Closed** Hidden under "Closed" list on inbox sidebar (no attention needed until visitor replies and make the conversation active again)
- **Ended** Simply ended, so the visitor won't be able to reply this conversation until you re-open

When conversation is active, you can either **Close** or **End** it:

#101



End



Active

### Closed

To close a conversation, simply click the button with "Check" icon on chat toolbar.

A closed conversation means that:

- It is currently no need attention
- You'll continue to be assigned to it
- When the visitor replies, it will be "Active" again

#101



End



Closed

### Ended

To end a conversation, simply click "End" button on chat toolbar.

An ended conversation means that:

- Visitors won't be able to reply until you restart it

#101

Restart



Ended

## Departments

Create departments for your different parts of your company (i.e. Sales, Support, etc.) and let visitors to choose the right team before initiating the chat.

The screenshot shows a chat window with a blue header. Below the header, there's a white rounded rectangle containing the text "Select a topic". Underneath, there are two buttons: "Sales" (highlighted in dark blue) and "Support" (light blue). Below these buttons is a light blue input field with the placeholder text "Enter your message...". To the right of the input field are two icons: a paperclip (for attachments) and a right-pointing arrow (for sending).

## Create department

Once you create a department, it will be available to all operators to join.

- Go to your [chat console](#)
- On the left-hand side, click "Settings" icon
- Go to "Departments"
- Click "Add department"
- Enter department name (i.e. Sales)
- Click "okay" icon or just press  key

## Join department

To join a department and start getting notified about department related notifications:

- Go to your [chat console](#)
- On the left-hand side, click "Settings" icon
- Go to "Departments"

- Click "Join"

When you join a department, you will start:

- Seeing related chats in your inbox
- Getting notified about related chats and messages

## Leave from department

If you don't want to be notified about department notifications nor see related chats and data in your inbox:

- Go to your [chat console](#)
- On the left-hand side, click "Settings" icon
- Go to "Departments"
- Click "Leave"
- Confirm that you want to leave

## Enable departments on chat widget

To let visitors to choose which department they want to talk, you can enable it from widget settings.

- Go to your [chat console](#)
- On the left-hand side, click "Settings" icon
- Go to "Widget"
- Check "Show departments" field under "Display options"
- Click "Save"

If there are any available departments (more than one), chat widget will start asking visitors to choose one of them before initiating chat.

## Departments visibility

If a visitor selects a department (lets say "Support"), only operators who are in Support department are notified and the conversation will be listed in their inbox.

If no department is selected by visitor, conversation appears in all operators' inbox.

### Tip

Operators can share a conversation link with other departments and **both can see and**

**reply.** For instance, if John in Sale department shares link with Anna in Support department, Anna can open conversation and reply even though the conversation isn't listed Anna's inbox.

## Users

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### Invite users to your app

You can have multiple teammates manage your application without giving them access to your screets Account. Inviting someone to manage your application:

- is safer than sharing your password
- lets you give only the amount of access they need

#### Add user

- Go to your [chat console](#)
- On the left-hand side, click "Settings" icon
- Go to "Users"
- Click "Invite"

#### Remove user or invitation

- Go to your [chat console](#)
- On the left-hand side, click "Settings" icon
- Go to "Users"
- Find the user you'd like to remove and click the "x" icon

### Admin roles

1. **Owner:** User who creates and owns the application. Can do anything.
2. **Administrator:** Can edit and remove others, edit everything. Can't delete channel.
3. **Editor:** Manage inbox, clients and some basic settings.
4. **Operator:** Manage inbox. Can't edit anything.

Role	Administrator	Editor	Operator
Manage inbox	Yes	Yes	Yes

Invite users	Yes	Yes	-
Delete users	Yes	Yes	-
Widget settings	Yes	Yes	-

# Notifications

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Each of your teammates in your application controls their own notifications via their personal account settings.

To change your notification settings:

- Go to your [chat console](#)
- On the left-hand side, click "Settings" icon
- Go to "General"
- Find "Notifications" card

## Receive email notifications

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If you enable "New chat requests" on "Notifications" card, you will receive emails when:

- New chat is initiated by visitor
- A visitor sends **offline form**

Tip

You receive offline form emails too, because it initiates chat after visitors send the form.

Please visit [docs.screets.io](#) for the most up-to-date documentation.