

Support Made Easy



nanoRep User Guide



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Support and Contact Information

Support – Email: support@nanorep.com

Support – Phone: +972-9-9578069

Sales – Email: sales@nanorep.com

Sales – Phone: +972-9-9578069

Important Notice

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Setting Up nanoRep

What is nanoRep?

nanoRep is scalable, web-based help-desk software with ticketing support, a self-learning Q&A knowledge base and on-the-fly multilanguage translation.

nanoRep creates a self-service experience for visitors to any website, Facebook page, CRM interface and so on. Customers get instant, professional, consistent and accurate answers across different channels from a single Q&A knowledge base.

nanoRep helps reps handle escalated tickets professionally until they are solved, while dynamically learning and building up its knowledge base in order to answer even more questions automatically!

- The more **accurate** the answers nanoRep provides to visitors' questions, the higher the probability of converting visitors into satisfied customers.
- The more **instant** answers nanoRep provides to users' questions, the more significant the escalation reduction to your support center reps.

How it Works

nanoRep users, reps and administrators use a completely web-based interface. All of nanoRep's functionality is provided by the nanoRep servers and by a single line of script integrated into your website. nanoRep is a SaaS (Software as a Service) system, whose software and knowledge base are hosted on nanoRep's servers.

No client installation is required to obtain the full benefits of nanoRep.

Installing Widgets

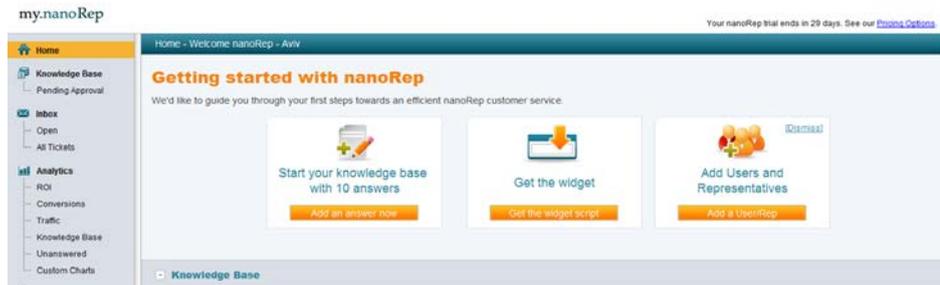
Several types of widgets are available, such as floating, embedded, most popular and Facebook widgets. Each can be installed by adding a different code snippet to your website hosting environment or performing a simple procedure. The snippet for each type of widget can be copied from the nanoRep web console.

If you have questions about or during this setup process, you can use nanoRep's floating widget on the nanoRep website. Simply post your questions to get the answers you need!



Floating, Embedded and Most Popular Widgets

- ▶ To get a floating, embedded or most popular widget code snippet:
 - 1 At my.nanorep.com, click the **Home** branch, which enables easy access to the first three steps for getting nanoRep support up and running, as shown below:



- Click the **Get the widget** button. The following information is displayed, enabling you to get a code snippet for the widget of your choice.

Widget setup

Floating widget

The floating widget follows your customers as they browse your website, allowing them to ask their questions instantly at any page, keeping them focused and engaged, driving them to a purchase decision, driving sales and site conversion.

[Click here](#)

Embedded widget

Designed to augment or replace your contact-page, one central search box answers your on-line customers instantly with precise answers, driving customer satisfaction, increases conversion while providing 90% escalation deflection.

[Click here](#)

Most popular widget

Shows real-time most popular questions from your nanoRep knowledge base.

[Click here](#)




Social media widget

Intergrate the nanoRep widget into your facebook or twitter.

[Click here](#)

Have Questions ?

Type your question here

what is nanoRep?

What is nanoRep?

nanoRep is a self-learning customer support solution, designed to address website abandonment by delivering accurate answers to customers' questions in real time.

The smooth user experience of having their questions answered instantly as they move through your website helps improve customer satisfaction.

With clients from a wide array of industries who trust nanoRep as their powerful customer support solution, nanoRep answers thousands of questions every hour, 24 hours a day, transforming customer experience and at the same time reducing support costs.

Ask a representative by: Email

Most Popular Questions

- > [What is nanoRep?](#)
- > [how much does it cost?](#)
- > [how do I contact you?](#)
- > [What payment methods are available?](#)
- > [where can I see nanoRep working?](#)
- > [How does nanoRep work?](#)
- > [how do you answer my questions?](#)
- > [Where can I download nanoRep?](#)
- > [How do I retrieve my invoice?](#)

- Click the **Click here** link of the widget type that you want to add to your website.

Floating Widget

Instructions for generating the code snippet are displayed, as shown below:

The screenshot shows a website header with a navigation bar containing links: Why nanoRep, Product, Pricing, Customers, Company, Blog, and Contact. The main heading is "Setting up nanoRep Float in your site in 3 easy steps!".

Step 1 - Add file to your site

In order to allow our interface to interact with your website, you need to add an HTML file to your site. Download the file by right-clicking on the following link and store the file in your web-site hosting.

[Download CDCFrame.html](#)

The full path on your website on which the file is stored (i.e. `http://yourdomain.com/CDCFrame.html`) will be referred to as **CDC Frame Path** in the next step.

* Please make sure that CDCFrame is hosted on the **same domain** you want to use the float in.

Step 2 - Fill in the following parameters

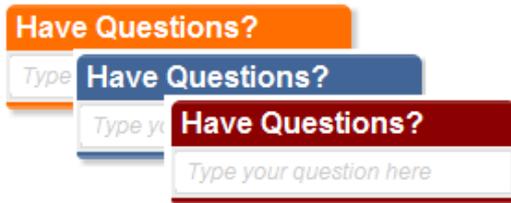
Your Account name:
CDC Frame Path:

Step 3 - Click [generate](#) and paste the code in your website

There is a "Have Questions?" button with a text input field containing "Type your question here".

Floating Widget Customization

nanoRep enables you to customize the background color and text color of the floating widget's top and bottom bar. You can also customize the text in the bottom bar (for example, to insert your slogan) and the background color of the text area. You can also specify whether the widget appears on the left or the right side of the screen. For more information, contact nanoRep support.



Embedded Widget

An embedded widget is simply a frame that you embed in your website. Therefore, you can design anything you want around it. The installation process of embedded widgets enables you to specify the size of this frame.

Instructions are displayed with the option to generate the code snippet, as shown below:

The screenshot shows the nanoRep website interface. At the top, there is a navigation bar with links: Why nanoRep, Product, Pricing, Customers, Company, Blog, and Contact. Below the navigation bar, the main heading reads "Setting up nanoRep Embed in your site in 2 easy steps!".

Step 1 - Fill in the following parameters

Your Account name:

Custom size

Width:

Height:

Step 2 - Click [generate](#) and paste the code in your website

.....

Paste the generated script in the appropriate position in your webpage.

All Done !

If you encounter any questions during the setup process, you can consult the nanoRep Float at any page in our site, and post a question if you do not find the answer you are looking for.

Have Questions ?

Type your question here

The following is an example of a customized embedded widget:

Instant Answers

Type your question below, and get an instant answer:

Type your question into the search box - in any language!

For instant answers, type in your question above!

For best results:

1. **Type in a full question**, not just single words.
2. Didn't find what you are looking for? **Try asking your question differently.**
3. Still can't find your answer? Click "Ask a Representative" to contact our Customer Support.

powered by **nanoRep**

Most Popular Answers Widget

The nanoRep most popular answers widget shows the current most popular questions from the nanoRep knowledge base. The list is dynamically updated. The installation process of a most popular answers widget enables you to specify the number of answers to show and the number of days from which to extract the most popular answers.

Instructions are displayed with the option to generate the code snippet. For example, as shown below:

Widget setup

Setup most popular widget

Your widgets will only work on the following domain(s):

- nanorep.com

For additional domains contact nanoRep support: support@nanorep.com

Step 1 - Choose widget dimensions

Days: Most popular answers from this number of days will be shown (1 - 1000).

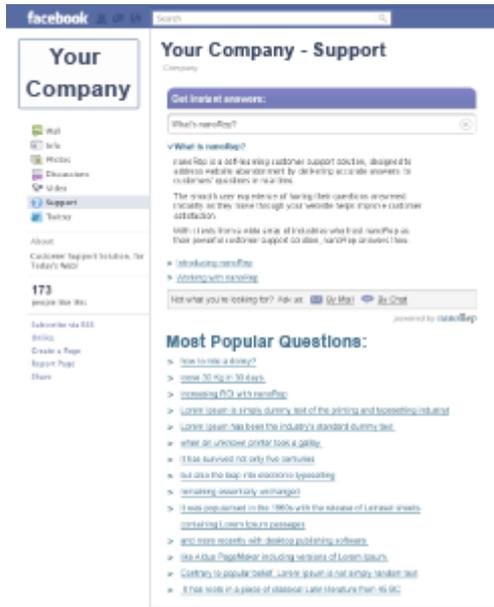
Items to show: The number of answers to show (1 - 30).

Step 2 - Click generate and paste the code into your website

Paste the generated script in the desired position on your webpage.

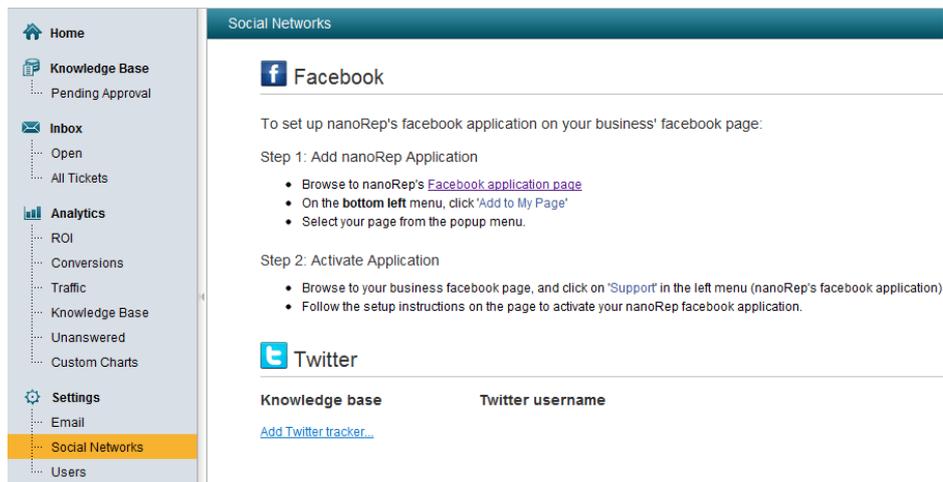
- 4 Follow the instructions in the displayed window. Click the **Generate** option and then copy the code into your website immediately before the closing body tag (`</body>`).

Facebook Widget



▶ To set up the nanoRep Facebook application on your business’s Facebook page:

- 1 In the nanoRep back office, select the **Social Networks** branch. Instructions are then displayed, as shown below:



- 2 Click the displayed link to go to nanoRep’s Facebook application page.

- 3 In the menu on the bottom left, click **Add to Page**.
- 4 From the popup menu, select your business's Facebook page.
- 5 Browse to your business's Facebook page and click **Support (nanoRep's Facebook application)** in the left menu.
- 6 Log in using your nanoRep account's user name and password and follow the setup instructions displayed on the screen.

Additional Options

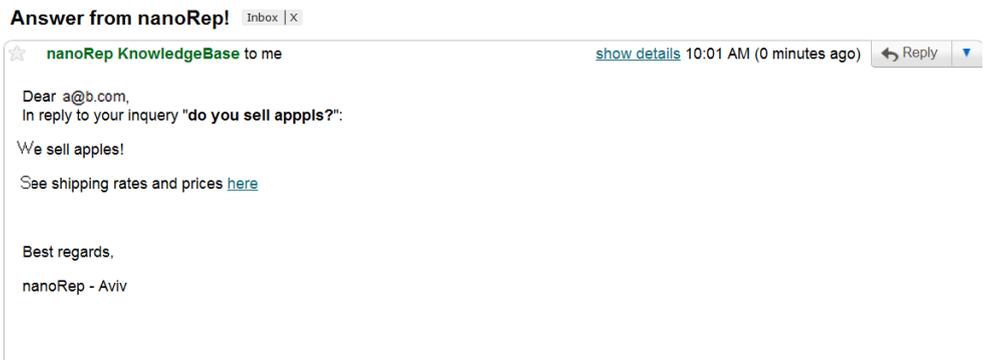
The following describes a few more options for using nanoRep.

NOTE

For information about supporting multiple knowledge bases, automatic translation, LivePerson integration and having different widget behavior for each page on your website, contact nanoRep support.

Email Answer Templates

The default text, contact, signature and sender address of the email answers that nanoRep reps send in response to escalated questions can be customized using the **Signatures** branch in the nanoRep back office interface.



Twitter

nanoRep also learns from Twitter! It enables your knowledge base to learn from Twitter posts and to include its answers among those that are provided.



► **To set up nanoRep for Twitter:**

- 1 In the nanoRep back office, select the **Social Networks** branch.
- 2 Click the **Add Twitter Tracker** link to display the following:

Add Twitter Tracker

To include Twitter posts in your search results, select the desired knowledge base and enter your Twitter username.

Knowledge base:

Twitter name:

- 3 Select the desired knowledge.
- 4 Enter your Twitter user name.
- 5 Click the **Add** button.

Incoming Email Address

nanoRep enables you to associate your support email address with the nanoRep ticketing system, and have all your support emails handled in nanoRep. To set up this feature, forward your support emails to the nanoRep incoming email address.

These emails are treated in the same way as any other incoming tickets, and the questions that they contain are added to the Inbox queue. You may refer to the *Reps Handling Their Inbox* section on page 21 for a description of how open tickets are handled.

The address to which to forward these emails is generated automatically by nanoRep and is displayed by selecting the **Settings** branch → **Email** branch. It appears under the **Knowledge Base Email Address** field.

my.nanoRep

The screenshot shows the nanoRep user interface. On the left is a navigation sidebar with categories: Home, Knowledge Base (Pending Approval), Inbox (58) (Open (66), My Tickets (1), All Tickets), Analytics (ROI, Conversions, Translations, Traffic, Knowledge Base, Unanswered, Custom Charts), and Settings (Email, Social Networks, Users, Change password). The 'Email' option under Settings is highlighted in orange. The main content area is titled 'Signatures' and contains the following sections:

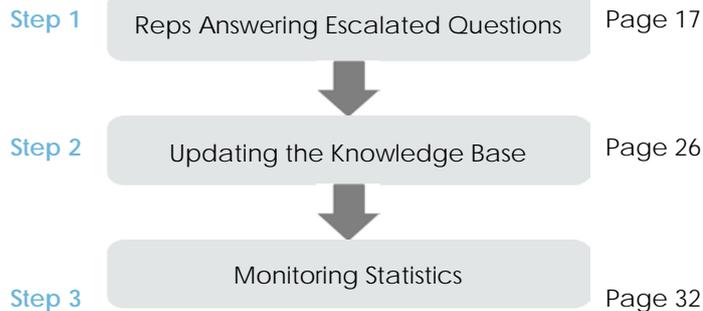
- Inbox addresses**: A section for forwarding emails to the nanoRep inbox. It shows a table with columns 'Knowledge base' and 'Email address'. The row for 'English' shows the address 'B042.nanoRep.inbox@my.nanoRep.com'.
- Signatures**: A section for managing email signatures. It includes a 'Create new' link and a list of signature types: 'Basic Signatures' (with sub-items 'Basic English Signature' and 'Basic Hebrew Signature'), 'Shared Signatures', and 'My Signatures' (with a 'New Signature' button). A preview of the 'Basic English Signature' is shown, including a salutation 'Dear %name%, In reply to your inquiry ""', a placeholder Lorem Ipsum text, and a sign-off 'Best regards, Aviv'.
- Default Signature**: A dropdown menu currently set to 'Basic English Signature'.
- Limit Users to default signature**: A checkbox that is currently unchecked.

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Working with nanoRep

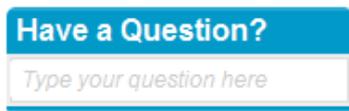
The following describes the sequence of actions that occur in a typical nanoRep scenario. It starts with a customer (end user or website visitor) asking a question on the website. It follows the process of a customer rep answering escalated questions, and ends with a satisfied customer and a richer knowledge base.



Step 1: Reps Answering Escalated Questions

Customers Asking Questions

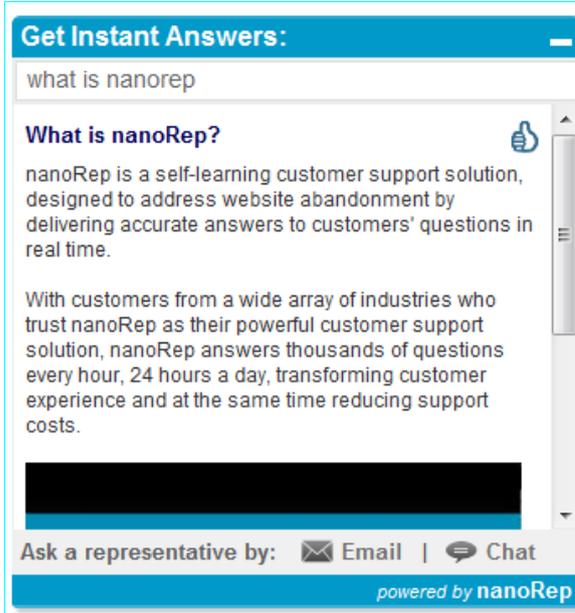
The following describes a typical scenario of a customer asking a question through nanoRep.



A customer, end user or potential buyer visits a website and sees the nanoRep widget floating around the website offering help.

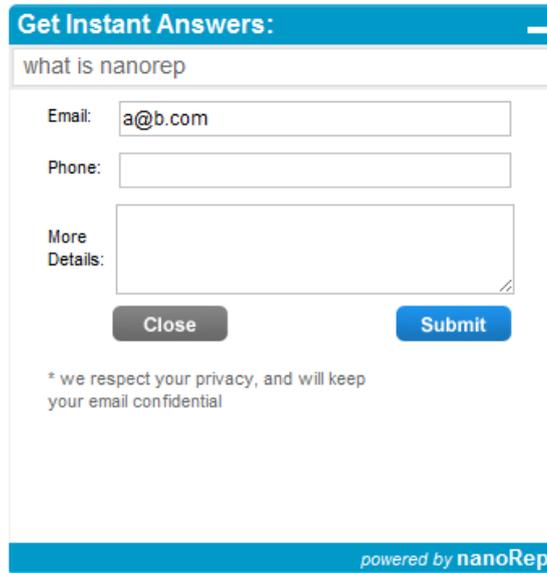
The customer types in a question.

If a similar question was asked previously or a customer rep previously defined an answer to this question or to something similar, then an answer is instantly displayed for the customer in the nanoRep floating widget, as shown below:



After a short time, your knowledge base will contain enough answers to address 90% of your customer's questions in this instant and automated manner.

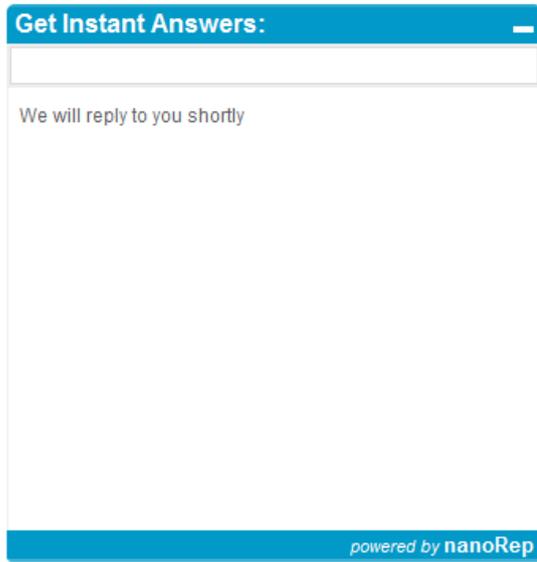
If the customer still wants to contact a rep, then he/she can click the **Ask a representative by email** link at the bottom of the floating widget to display the following window:



The image shows a floating window titled "Get Instant Answers:" with a blue header. Below the header is a search bar containing the text "what is nanorep". Underneath the search bar are three input fields: "Email:" with the value "a@b.com", "Phone:" which is empty, and "More Details:" which is a larger text area. Below these fields are two buttons: "Close" and "Submit". At the bottom of the window, there is a blue bar with the text "powered by nanoRep".

The customer can then enter his/her email, type in more details about the question and click **Submit**.

A confirmation message is then displayed for the customer on your website:



NOTE Chat escalation is also available with LivePerson chat integration. For more information, contact nanoRep support.

Reps Logging In to nanoRep

► To log in to nanoRep:

- 1 Navigate to **my.nanorep.com** from any standard browser. The following is then displayed:

my.nanoRep™

Please enter your credentials.

Username:
e.g. (username@account)

Password:

Keep me logged in (on this computer).
Don't check this box if you're at a public or shared computer.

 Sign in

- 2 Enter your **Username**, **Password** and click the **Keep me logged in** option.

NOTE

If needed, you can reset a nanoRep user's password by selecting the **Users** branch, selecting the user's name, selecting the **Edit** option and then selecting the **Reset Password** option.

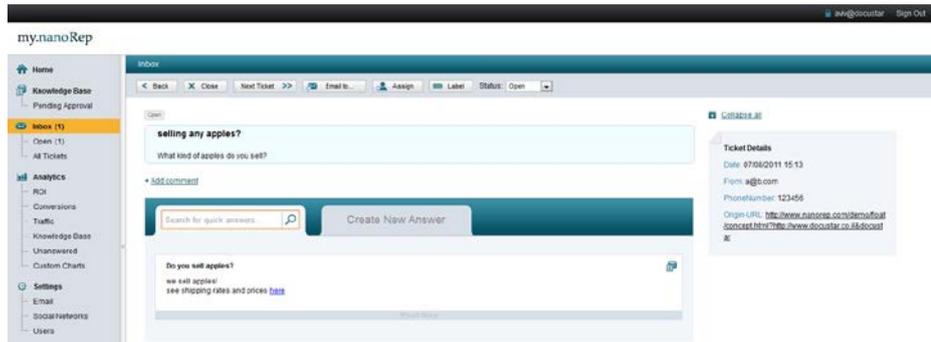
Reps Handling Their Inbox

When a customer escalates a question to a rep, the **Inbox** branch in the nanoRep back office displays an incremented number, as shown below:

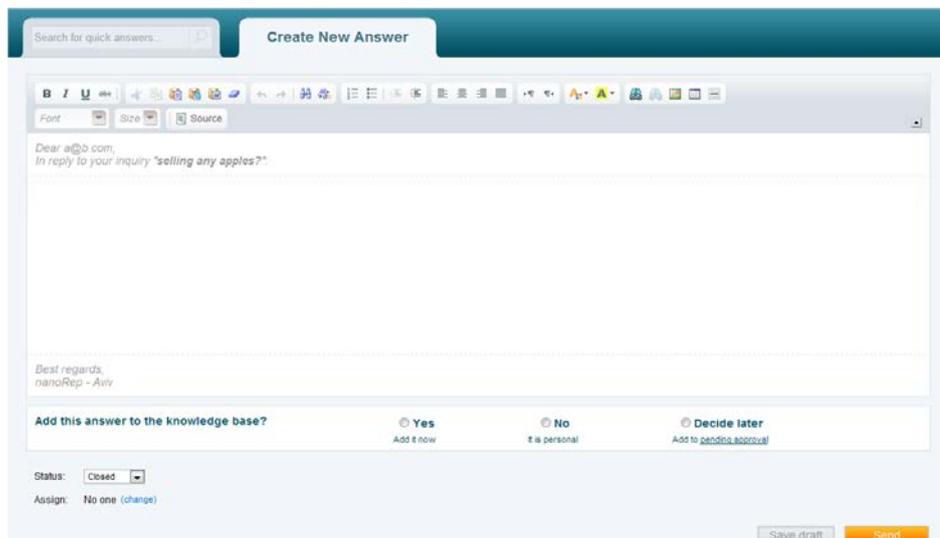


► **To handle the Inbox:**

- 1 Click the **Inbox** branch to display the list of unhandled escalated questions or the **My Tickets** branch to display a list of questions that were assigned to you by another rep or administrator using the **Assign** button.
- 2 Double-click a question's row to display the answer editor, as follows:



- 3 The **Search for quick answers** field presents suggested answers taken from your knowledge base. You can also type in a query to find additional answers in the knowledge base. You can then click anywhere on a relevant answer to send this answer to the customer. You will be able to edit the answer before sending it to the customer.
- 4 You can click the **Create New Answer** button to type in a new answer for the customer. A variety of links, images, videos and text types can be easily added to each answer using the nanoRep toolbar.



Before sending the new answer to the customer, you will be asked to select one of the following options:

- **Yes**, to store this answer in the knowledge base without going through the **Pending Approval** queue. For users with content management permissions, this option adds the answer directly to the knowledge base. For regular reps, this option adds this answer to the **Pending Approval** queue.
- **No**, to discard this answer after it is sent to the customer.
- **Decide later**, for users with content management permissions this option enables them to add this answer to the **Pending Approval** queue to be reviewed and edited before being added to the knowledge base.

5 In the **Status** field on the bottom left of the screen, select one of the following options:

- **Open**: To define that this question still requires attention. The ticket is then added to the **Open** queue, which can be viewed and handled by selecting the **Open** branch.

NOTE If a customer responds to an email sent by a rep, then the ticket is re-opened in the Inbox with the updated correspondence.

- **Close**: To define that this question has been completely answered and no longer requires any more rep interaction with the customer. This ticket is automatically saved in the **All Tickets** queue, which contains the history of all handled tickets.

NOTE The Inbox contains questions that have not yet been handled by anyone.

6 Click the **Send** button to send this answer the customer.

An email similar to the following is sent:

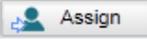


Other Options

Comments

You can add an internal comment to a question from a customer or to a rep's answer by clicking the **Add Comment**  button. Comments are only seen by reps, are not added to the knowledge base and are not seen by customers.

Assign

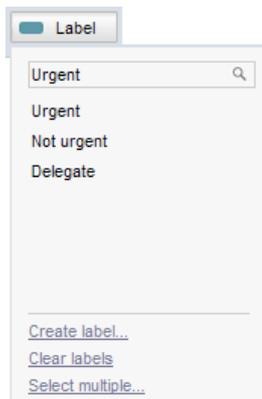
The questions in the Inbox can be handled by all reps. A question can be assigned to be handled by a specific rep by clicking the **Assign**  button and then selecting the rep to which it is assigned. Reps can see the tickets assigned to them in the **My tickets** branch.

Labels

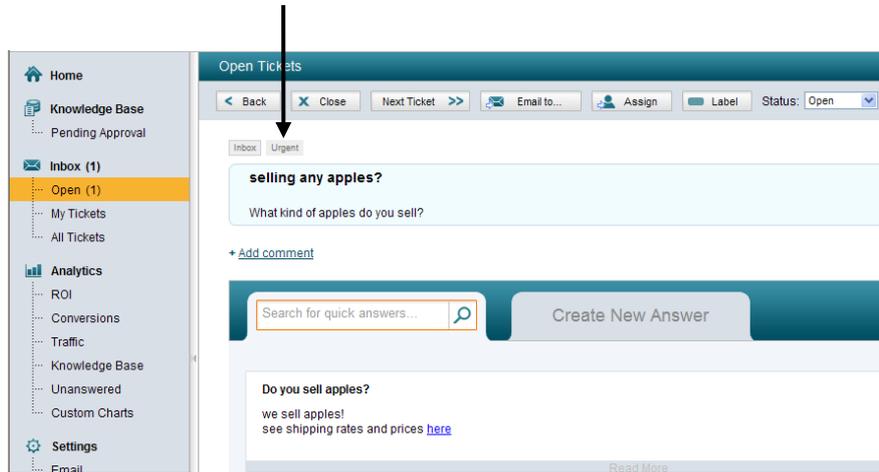
You can define labels for tickets in order to mark them for a variety of purposes, such as to specify the department to which they belong, whether they are urgent and so on.

► **To assign a label to a ticket:**

- 1 Open the ticket by selecting it in any of the queues, such as the **Inbox**, **Knowledge Base** or **Open** queue.
- 2 Click the **Label** button and select the relevant label from the dropdown menu, as shown below:

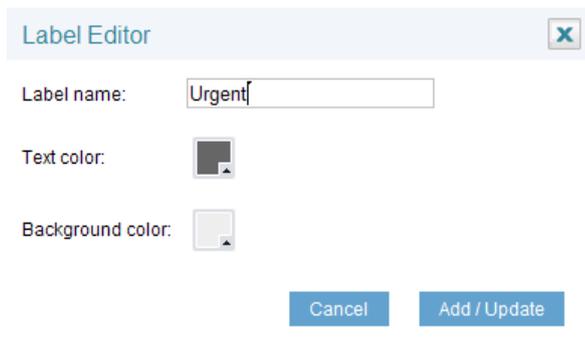


A small box is then added to the ticket, as shown below:



► To define a new label:

- 1 Click the **Label** button and then select the **Create Label** option from the dropdown menu, which is shown above. The following window is displayed:



- 2 Fill in the fields of this window and click the **Add/Update** button.

Step 2: Updating the Knowledge Base

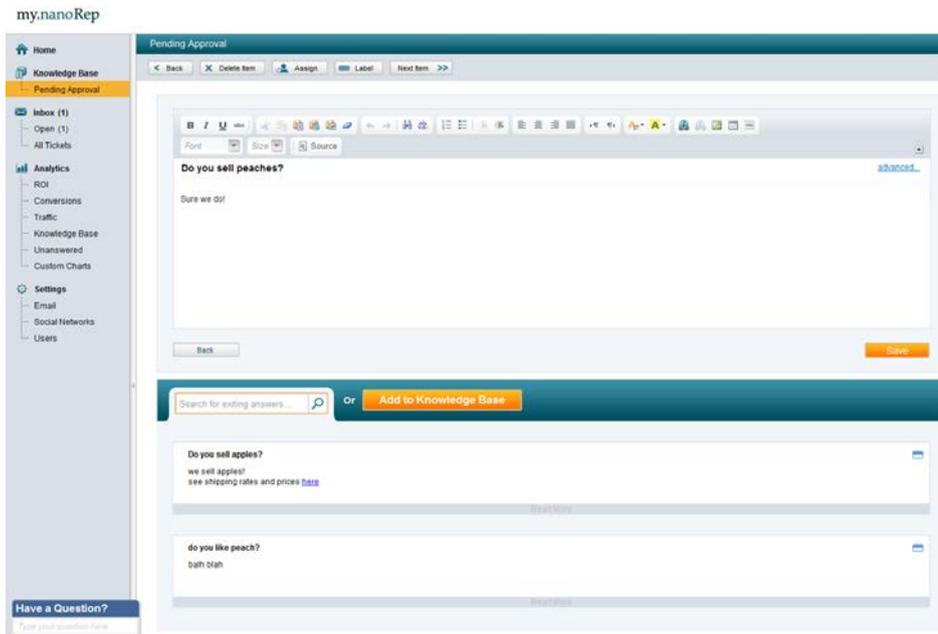
Handling Pending Knowledge Base Updates

Reps can add answers to the knowledge base as they answer customers or build up answers before they are asked.

New answers are added to a special queue called **Pending Approval** where they can be reviewed, verified and edited before being approved and added to the knowledge base to be used to answer future relevant questions instantly.

► **To handle pending knowledge base updates:**

- 1 Click the **Pending Approval** branch to display the list of updates waiting to be edited and approved for the knowledge base of answers.
- 2 Click an answer to display the following:



You can edit the answer using a variety of links, images, videos and text types, which can be easily added using the nanoRep toolbar. For example, the **Link**  tool enables you to add a link to the answer. You can link to a URL, email or another answer in the knowledge base. The **Image**  tool enables you to add a picture to the answer.



You can click the **Source**  button to display the HTML code of the answer. You can then edit the HTML, which enables you to add more advanced features to the answer, such as a YouTube video.

- 3 Click the **Add to Knowledge base** button to add the new answer to the knowledge base to be available as the answer to future relevant questions.

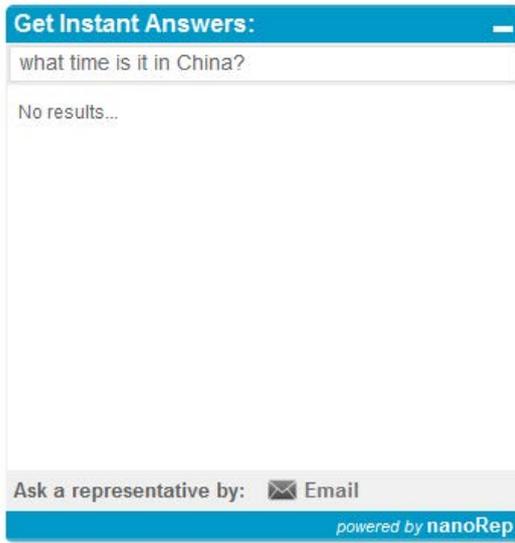
Or

You can click the **Save** button to save the changes, but leave this answer in the **Pending Approval** queue.

- 4 Alternatively, you can use the **Search for existing answers** field, where you can type in a query to find existing answers in the knowledge base. If one is relevant, then you can click it to teach the knowledge base that this answer applies to the same question.

Handling Unanswered Questions

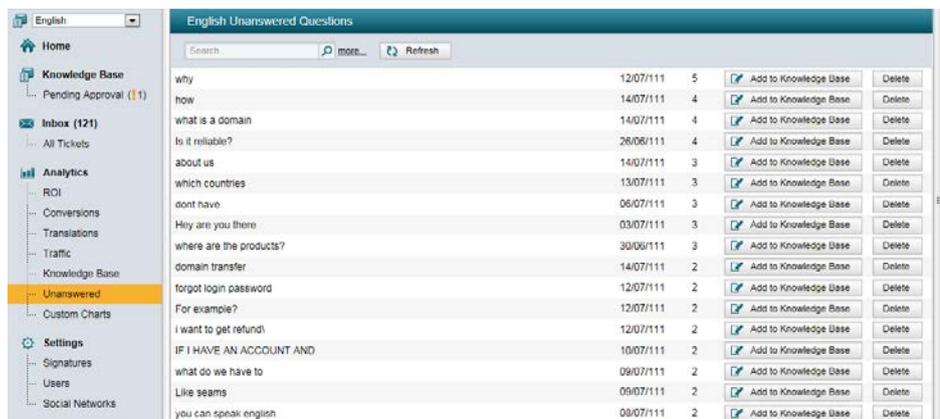
When a customer asks a question for which no automatic answer was found in the nanoRep knowledge base, the following is displayed indicating that no results were found:



The customer then has the option to click the **Ask a representative by** link. If the customer does not click that link, then this question is categorized as **Unanswered**.

► **To answer unanswered questions:**

- 1 Select the **Unanswered** branch to display a list of unanswered questions.



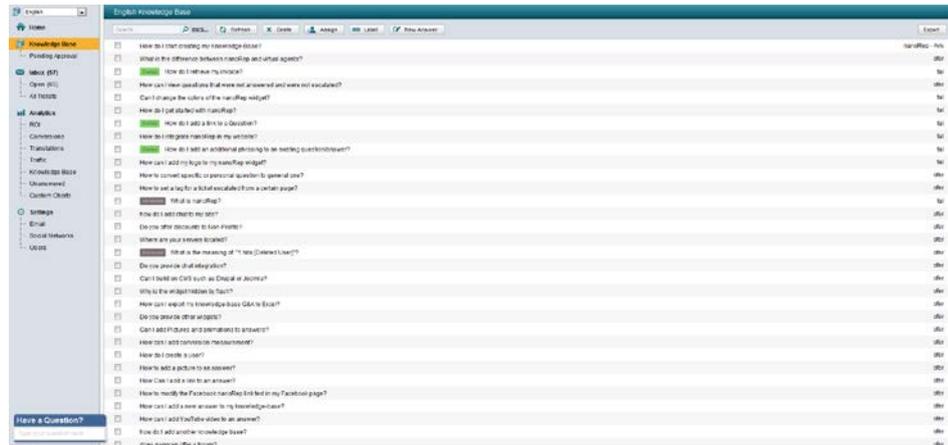
- Click the **Add to Knowledge Base** button on the right of the relevant question to display the following and to answer the question:

Updating the Knowledge Base

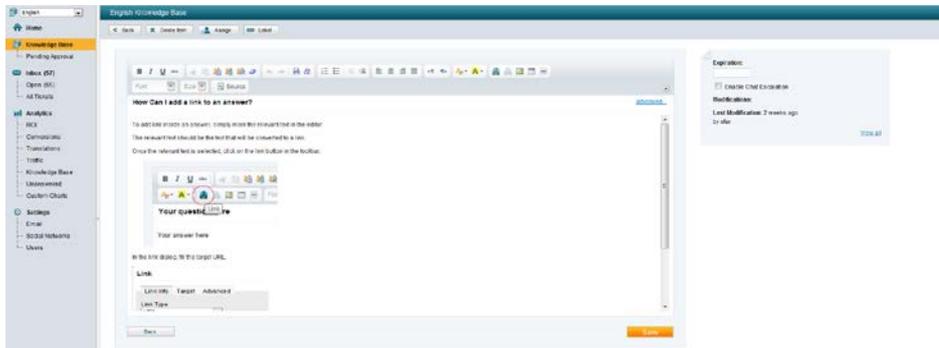
From time to time, you may want to change, add or delete an answer in the knowledge base. This task can be performed on an as-needed basis.

- ▶ **To update the knowledge base:**

- Click the **Knowledge Base** branch. The following is displayed:



- 2 Click an answer to open it for editing, as shown below:



- 3 Edit the answer, as needed.
- 4 Set the expiration date for this answer, if required, as shown below:

Modifications:

Last Modification: 4 weeks ago
by ofer

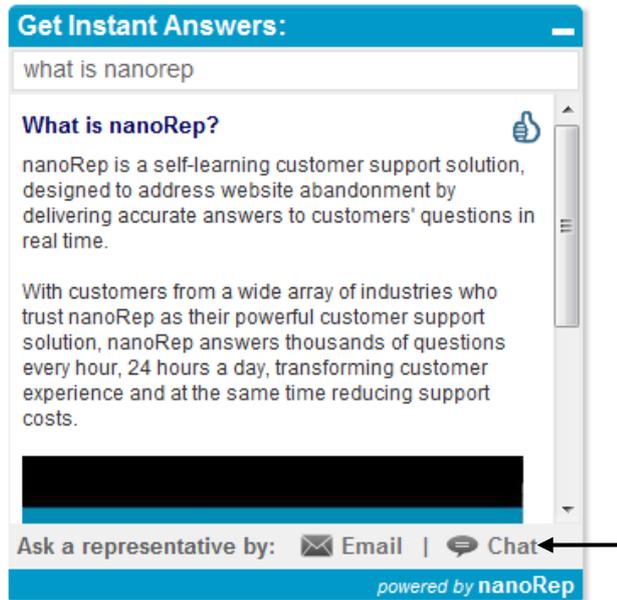
4 weeks ago
Created by ofer

Expiration:

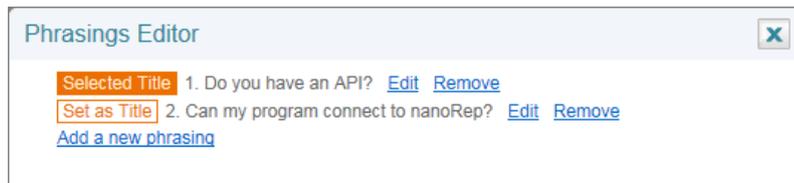
July 2011

Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

- 5 Check the **Enable Chat Escalation** checkbox to provide customers with the option to chat with a live person in the nanoRep widget. For example, as shown below:



- 6 Associate additional questions for this answer by clicking the **Advanced** link. The following window is displayed:

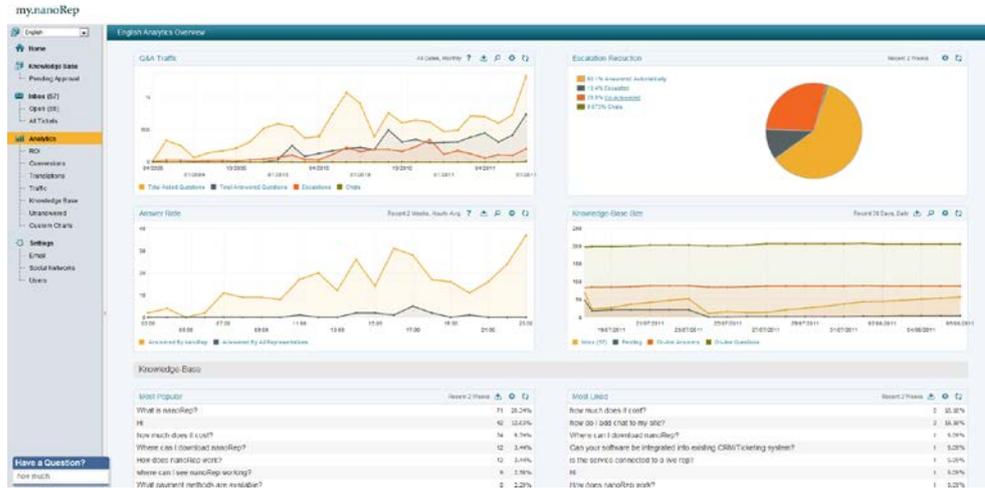


- 7 Click the **Save** button.

NOTE You can click the **View All** link to see a history of the modifications to this answer.

Step 3: Monitoring Statistics

A variety of big-picture and drill-down reports are provided describing various aspects of knowledge base, rep, customer and question/answer statistics.



Select the **Analytics** branch to display a dashboard of performance and statistical reports or one of the sub-branches of the **Analytics** branch to see this information in more detail. The following describes a few of these graphs:

- **Q&A Traffic:** Shows how many questions were asked in the nanoRep widget, how many were answered automatically and how many were escalated to a rep.
- **Escalated Reduction:** Shows the same information as the Q&A Traffic report in the form of a pie chart.
- **Knowledge Base Size:** Shows how many questions are currently in the Inbox and Pending Approval queues. It also shows how many questions and how many answers are in the knowledge base.

NOTE A single answer can have multiple related questions.

Each graph provides a toolbar of options to export the information, zoom in or to redisplay the default view.



You can create customized charts of your choice by clicking the **Custom Chart** branch. The following will be displayed:



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