Support Made Easy

nanoRep User Guide

nanoRep™

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Support and Contact Information

Support – Email: support@nanorep.com

Support – Phone: +972-9-9578069

Sales – Email: sales@nanorep.com

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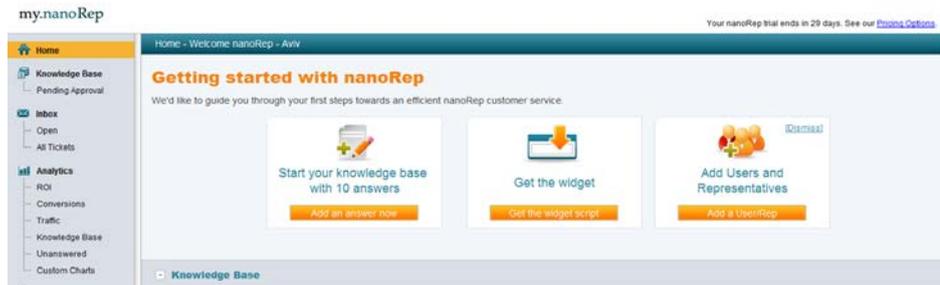
2 Click the **Get the widget** button. The following information is displayed, enabling you to get a code snippet for the widget of your choice.

3 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:

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.
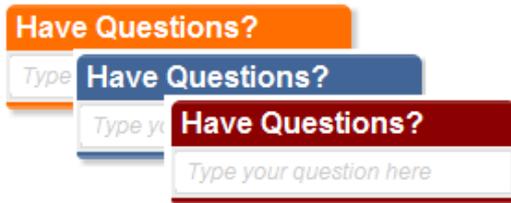
Embedded Widget

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 following is an example of a customized embedded widget:

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:

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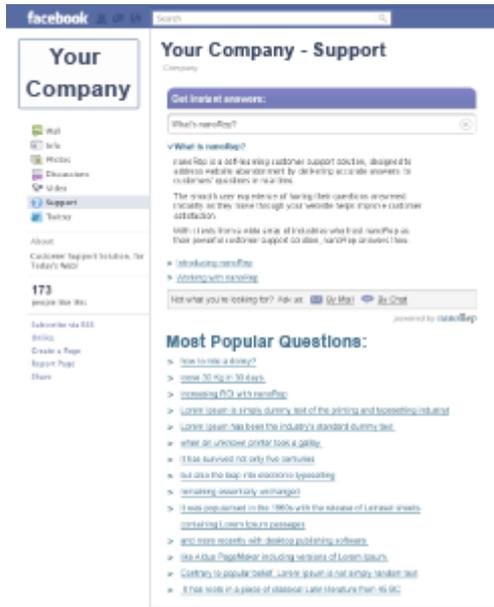
▶ **To set up the nanoRep Facebook application on your business's Facebook page:**

1 In the nanoRep back office, select the **Social Networks** branch. Instructions are then displayed, as shown below:
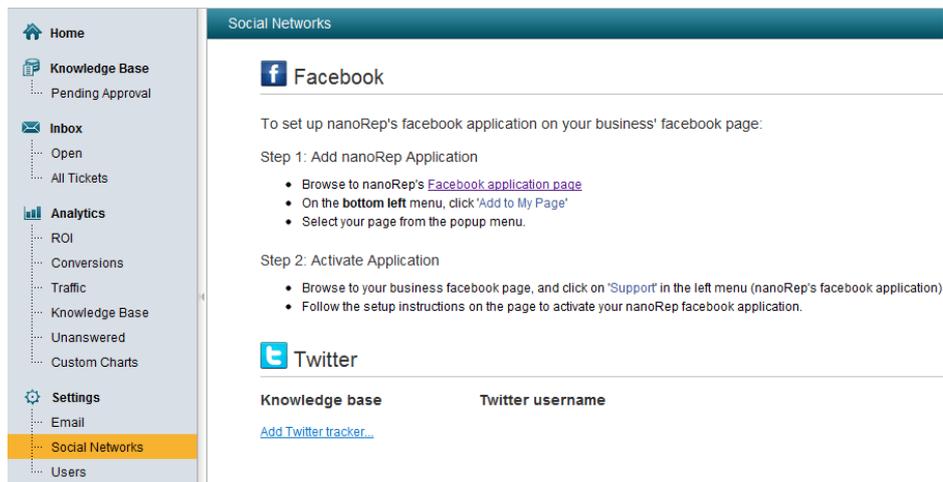
2 Click the displayed link to go to nanoRep's Facebook application page.

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.

Answer from nanoRep!   Inbox | x

☆   **nanoRep KnowledgeBase** to me   show details 10:01 AM (0 minutes ago)   ↩ Reply   ▼

Dear a@b.com,
In reply to your inquiry **"do you sell apppls?"**:

We sell apples!

See shipping rates and prices here

Best regards,
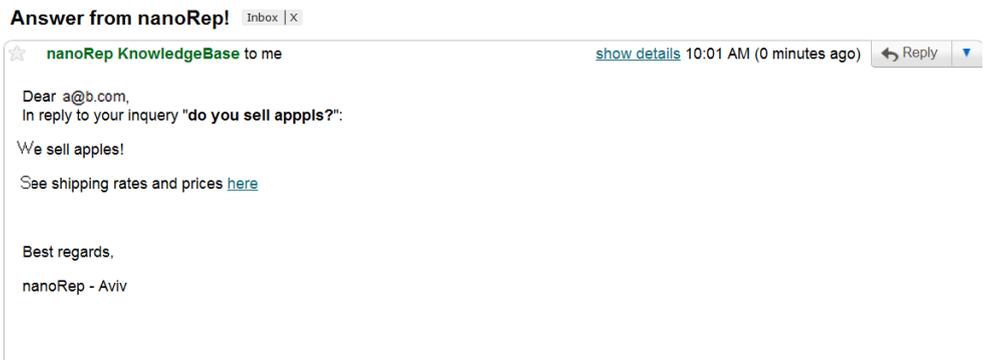
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Twitter

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:

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.

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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	Page 17
Step 2	Updating the Knowledge Base	Page 26
Step 3	Monitoring Statistics	Page 32
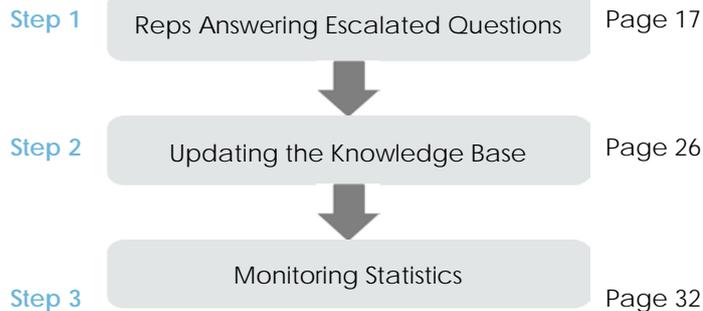
Step 1: Reps Answering Escalated Questions

Customers Asking Questions

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

Have a Question?

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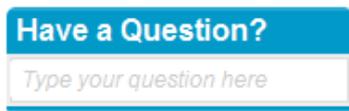
A customer, end user or potential buyer visits a website and sees the nanoRep widget floating around the website offering help.

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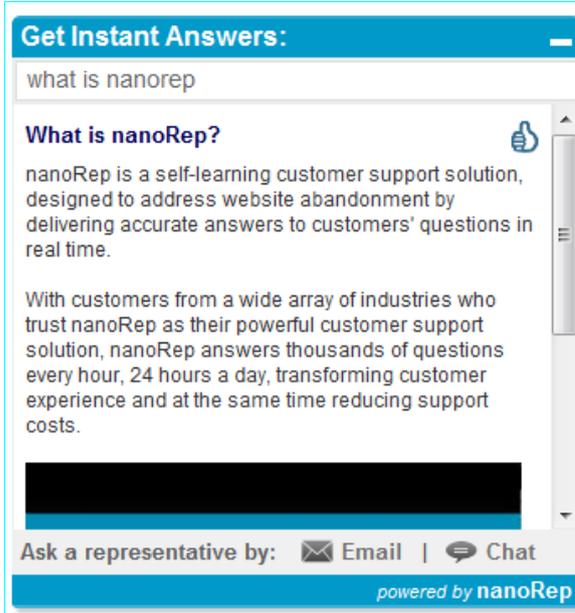
After a short time, your knowledge base will contain enough answers to address 90% of your customer's questions in this instant and automated manner.

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 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:

Get Instant Answers:

We will reply to you shortly

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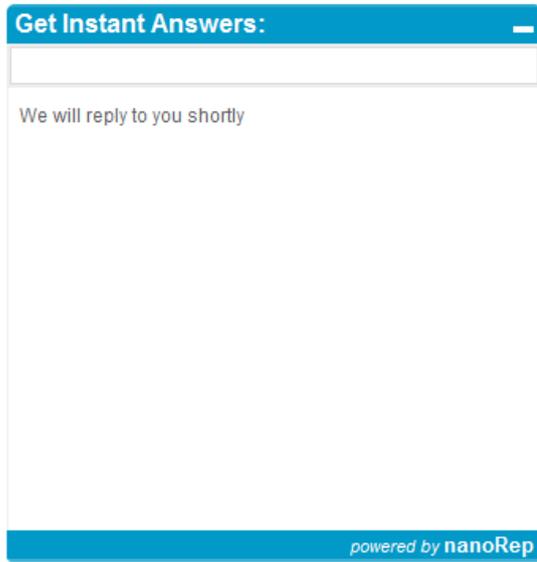
| NOTE | Chat escalation is also available with LivePerson chat integration. For more information, contact nanoRep support. |

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:

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:
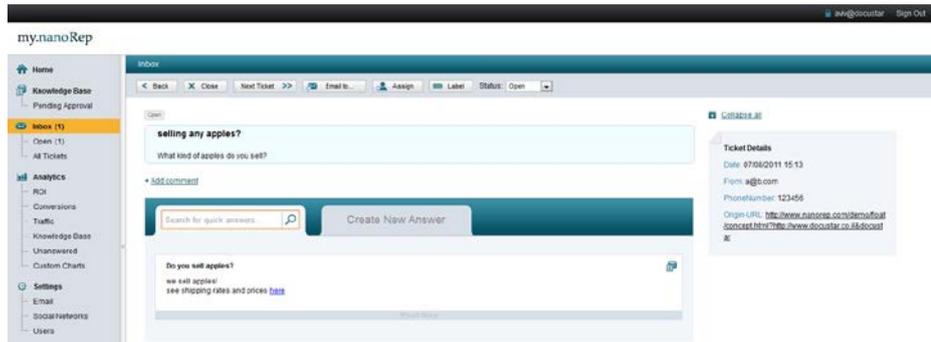
3 The **Search for quick answers** field presents suggested answers taken from your knowledge base. You can also type in a query to find additional answers in the knowledge base. You can then click anywhere on a relevant answer to send this answer to the customer. You will be able to edit the answer 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.
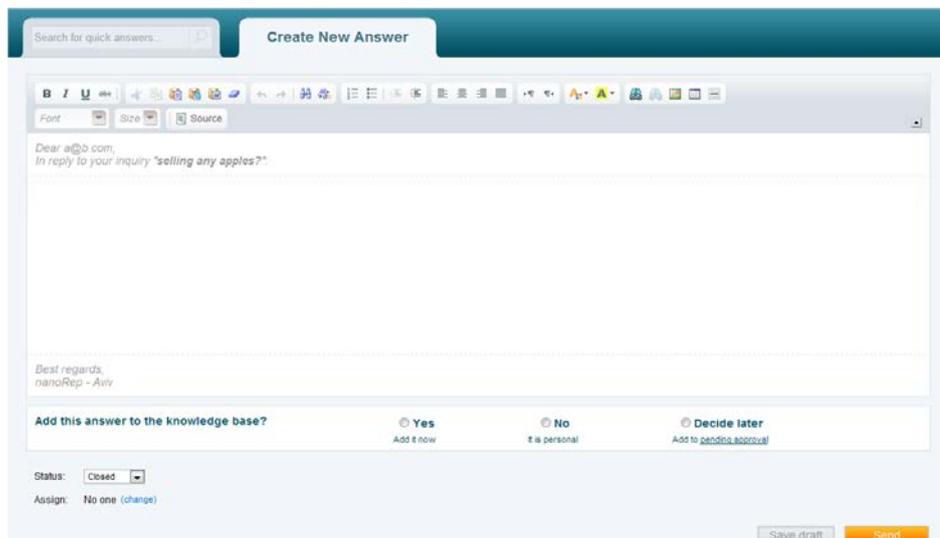
Before sending the new answer to the customer, you will be asked to select one of the following options:

- **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:

Answer from nanoRep! Inbox | X

nanoRep KnowledgeBase to me   show details 10:01 AM (0 minutes ago)   ↩ Reply ▾

Dear a@b.com,
In reply to your inquery "**do you sell apppls?**":

We sell apples!

See shipping rates and prices here

Best regards,

nanoRep - Aviv

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** [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** [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.
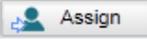
Labels

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:
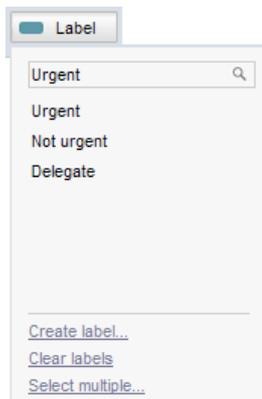
A small box is then added to the ticket, as shown below:
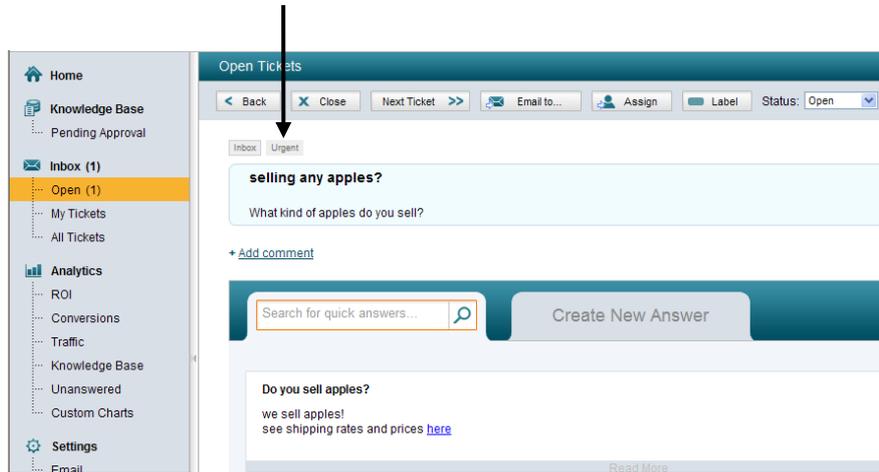
► **To define a new label:**

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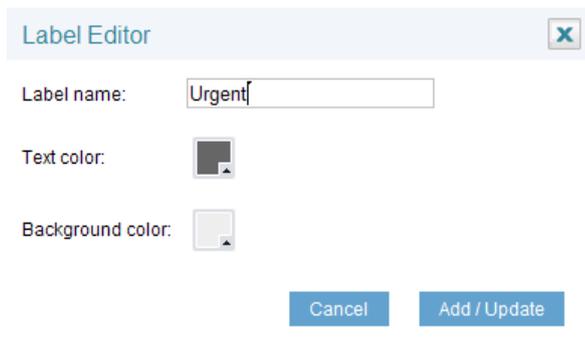
2 Fill in the fields of this window and click the **Add/Update** button.

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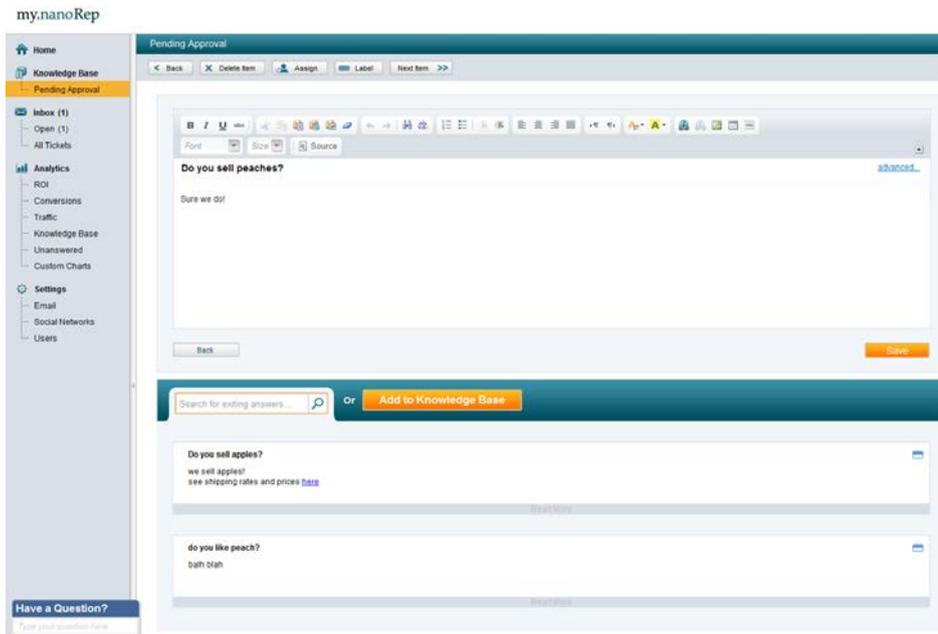
You can edit the answer using a variety of links, images, videos and text types, which can be easily added using the nanoRep toolbar. For example, the **Link** tool enables you to add a link to the answer. You can link to a URL, email or

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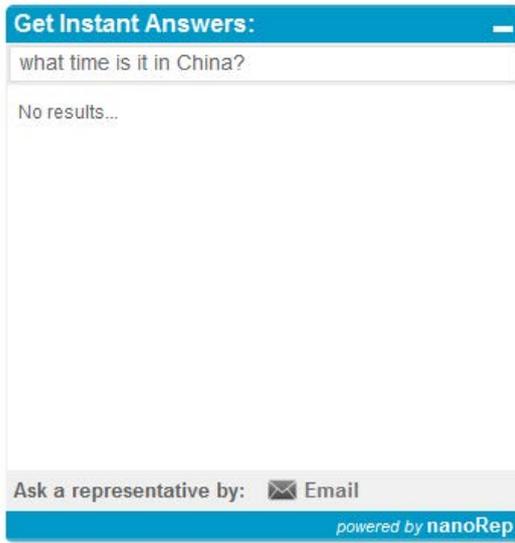
The customer then has the option to click the **Ask a representative by** link. If the customer does not click that link, then this question is categorized as **Unanswered**.

► **To answer unanswered questions:**

 1 Select the **Unanswered** branch to display a list of unanswered questions.
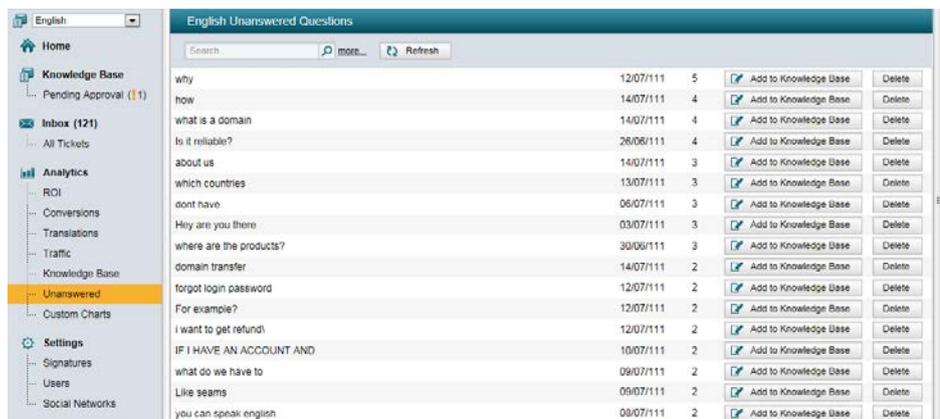
2   Click the **Add to Knowledge Base** button on the right of the relevant question to display the following and to answer the question:

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:**

1   Click the **Knowledge Base** branch. The following is displayed:
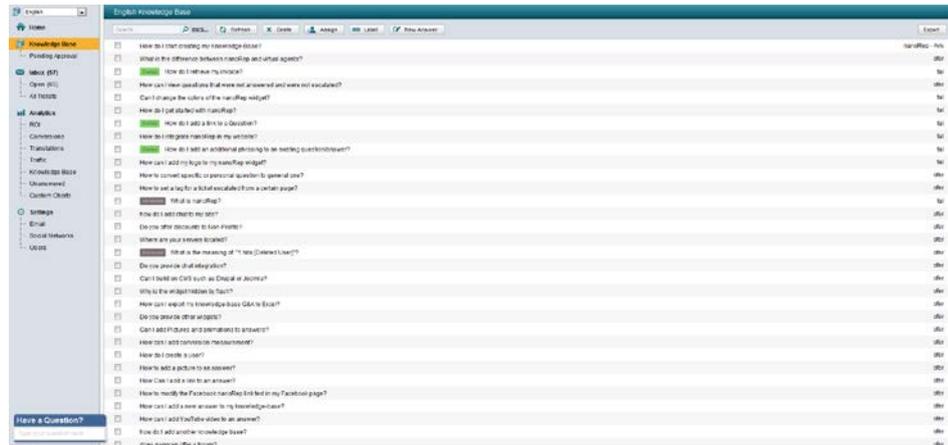
2   Click an answer to open it for editing, as shown below:
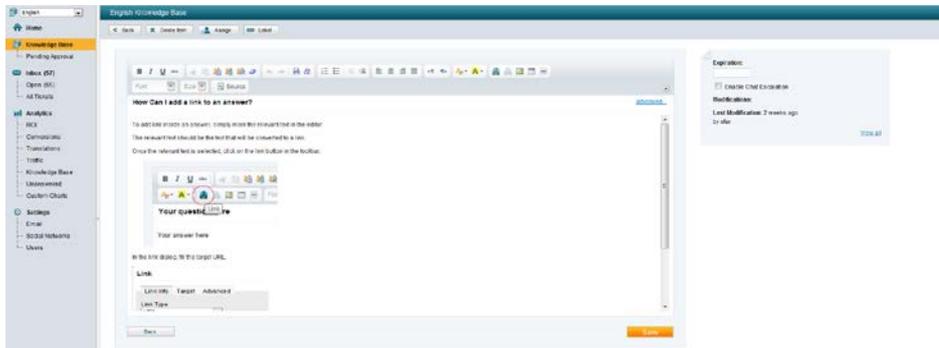
3   Edit the answer, as needed.

4   Set the expiration date for this answer, if required, as shown below:

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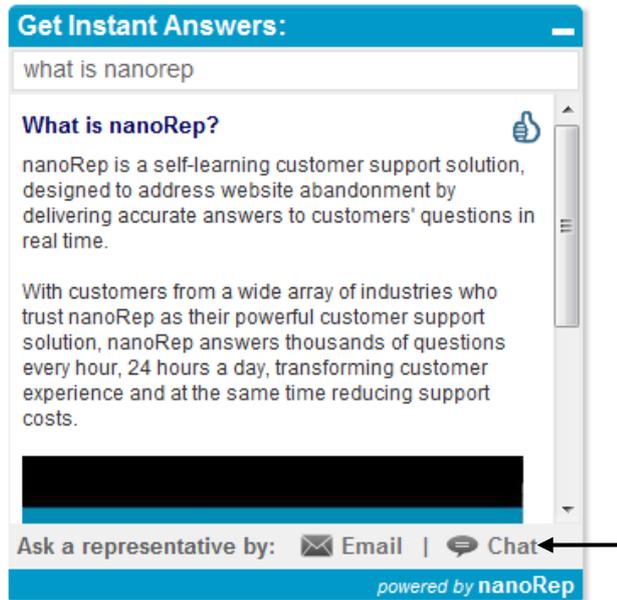
6 Associate additional questions for this answer by clicking the **Advanced** link. The following window is displayed:
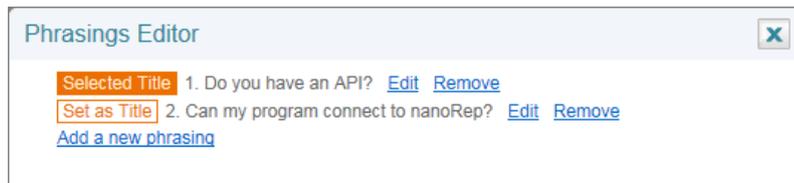
7 Click the **Save** button.

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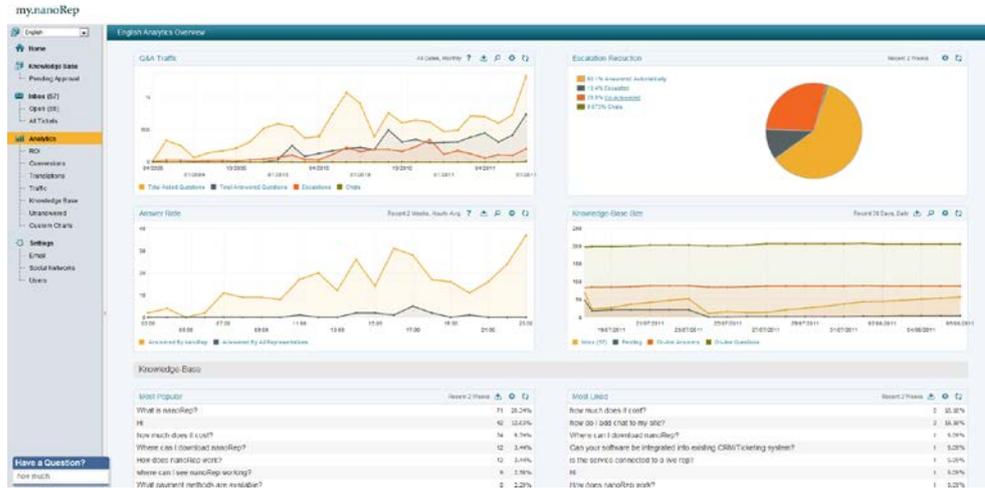
Select the **Analytics** branch to display a dashboard of performance and statistical reports or one of the sub-branches of the **Analytics** branch to see this information in more detail. The following describes a few of these graphs:

- **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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