Clerk Chat

Getting Started 101

Quick Reference Guide

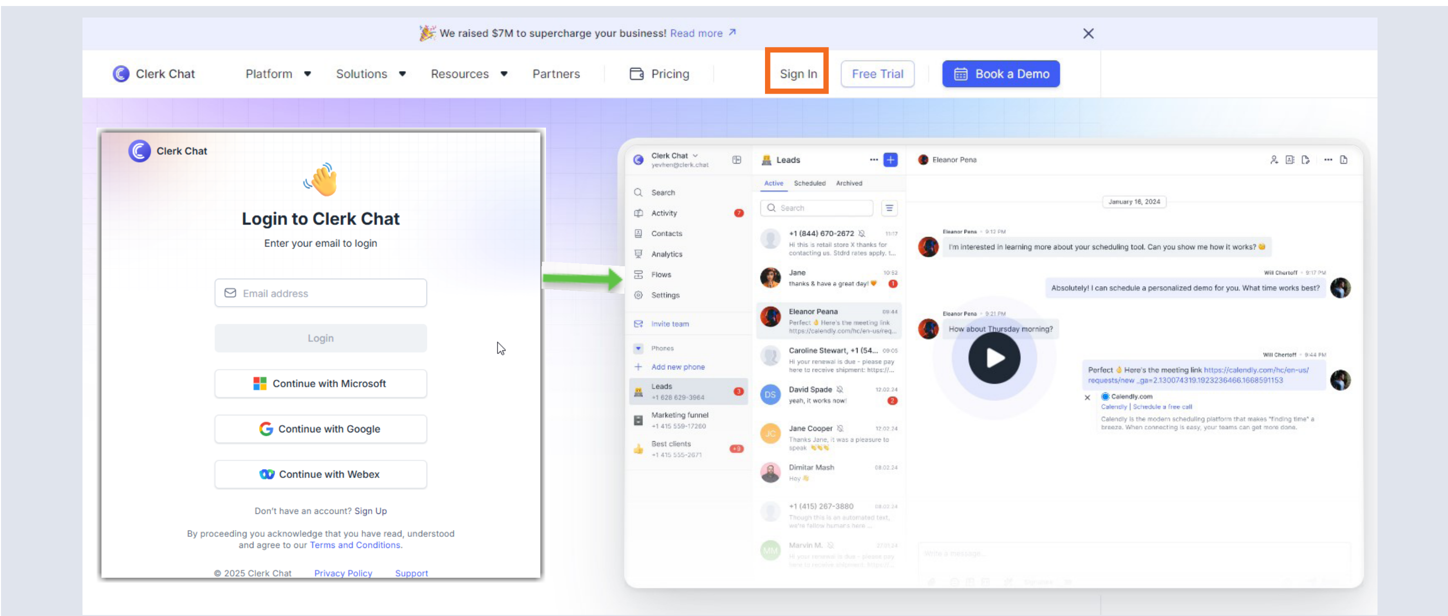
INTRODUCTION

The Clerk Chat service enables personalized manual and automated text communications with customers and employees from typical work collaboration tools like WebEx or Teams. Once your Clerk Chat account -- and credentials -- are provided to you by your System Admin, you will need to log in to get started and add the Clerk Chat app to your collaboration application if you will use it for business texting.

ACCESS CLERK CHAT

To use any of Clerk Chat's features, you will need to be licensed and access the Clerk Chat App. The web app is easiest to find and use. Your organization will send an invitation to get started via email once you have been licensed with a role assignment. Or if you know your credentials, you can go to: **https://app.clerk.chat/login**

Enter your email address and follow all prompts to get started. *You will be emailed a one-time verification code to input.*



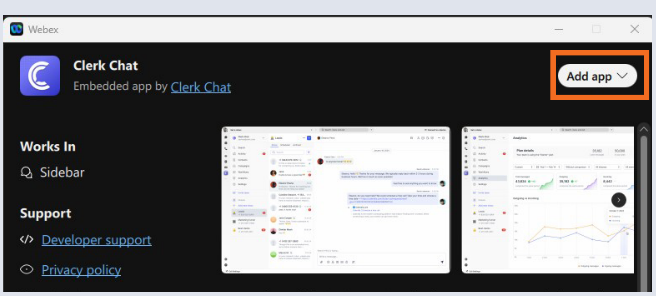
Also, the same features and tools found in the Clerk Chat web app are available as app add-ins for Webex or Teams users.

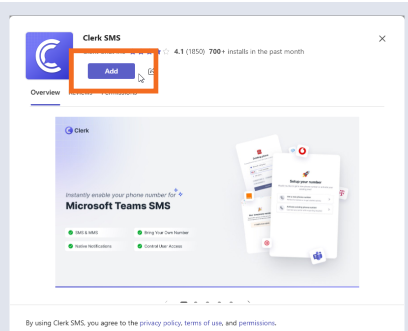
TO ADD CLERK CHAT APP TO WEBEX

+ In Webex App, go to More > App Hub and search Clerk Chat.
+ Select **Add App** and follow any instructions. *The app now appears in your Webex.*

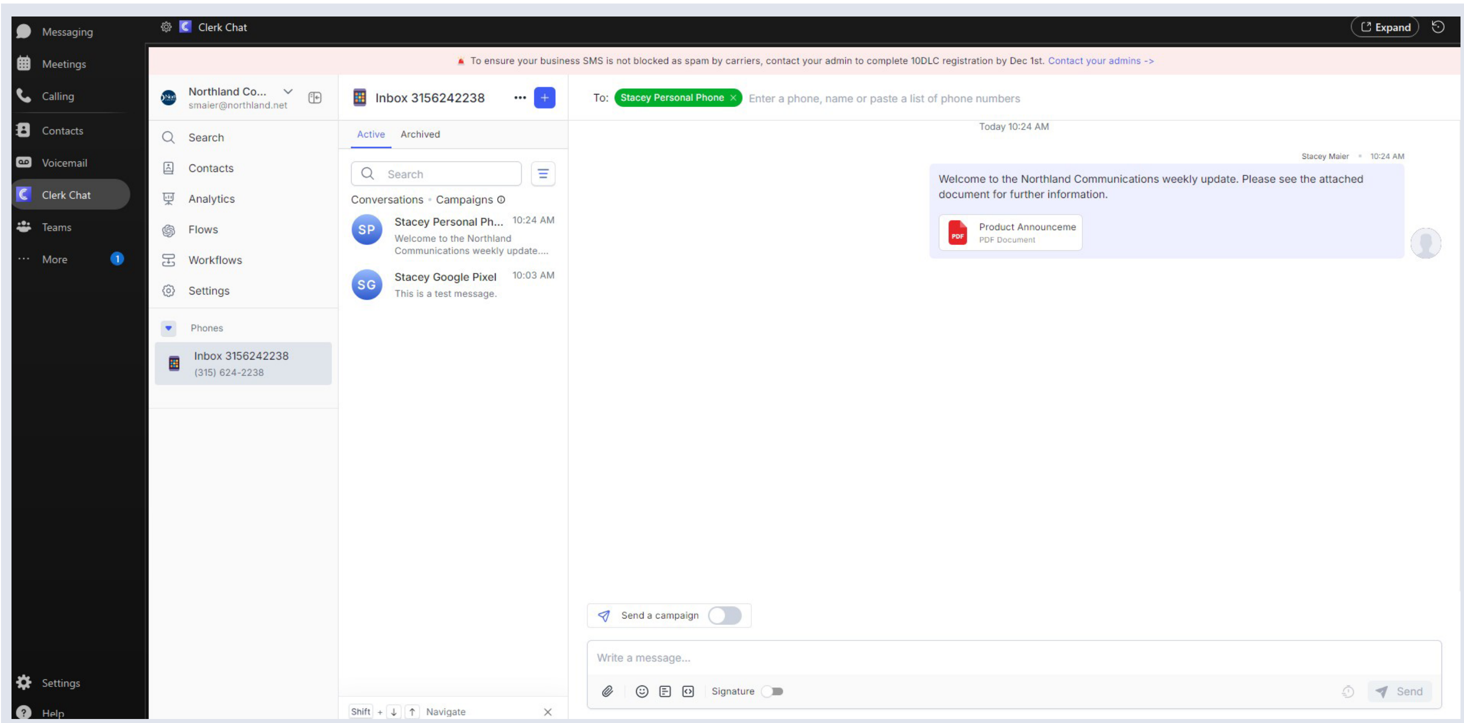
TO ADD CLERK CHAT APP TO TEAMS

+ In Teams App, go to Apps and search Clerk Chat.
+ Select **Add App** and follow any instructions. *The app now appears in your Teams.*





CLERK CHAT HOME SCREEN



Search: Search Contacts, Conversations, Inboxes and Workspaces.

Contacts: View Contacts, Cohorts and Block list. Add or import contacts from other sources.

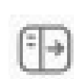
Analytics: View Analytics for Outgoing and Incoming messages. Show comparison between current and previous periods or years. Filter by inboxes and/or members.

Flows: Ultimate - Set up your own AI Assistant by uploading enterprise domain specific documents to train the Clerk Chat AI bot and establish protocols for automated responses to customer inquiries. (Available only with the Ultimate License)

Workflows: Ultimate - Provides a user with the ability to build automated treatment and responses to incoming messages when the user is unavailable. Workflows can be built to trigger based on time of day, day of week, specific words contained within the body of the message to streamline your business communication and provide prompt responses to your contacts during your away hours. (Available only with the Ultimate License)

Settings: Update your Avatar, personal data, and create a custom signature.

Phones: Displays all SMS enabled phone number inboxes assigned to you by your administrator.
Choose the phone inbox you want to use to send or review SMS messages.
You can also set up out of office and business hour parameters via the phones section settings.

NOTE: Collapse and expand the ribbon by selecting the Collapse / Expand icon  in the top ribbon window.