

AI Chathot - User guide

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Introduction

AI Chathot is an omnichannel conversation management platform that brings customer messages from connected channels into a single interface, allowing support teams to monitor and handle conversations in one place. It also supports conversation management, internal collaboration, work assignment, and AI-assisted customer support.

AI Chathot is designed for two main user groups: Support Agents, who handle customer conversations on a day-to-day basis, and Administrators, who configure the system, connect channels, and manage operations.

Key Highlights

AI Chathot helps businesses centralize customer support across multiple channels in one workspace, while supporting work assignment, internal collaboration, service quality monitoring, and AI-assisted conversation handling.

For Agents

- Receive, reply to, search, filter, and manage conversations from Inboxes you are authorized to access.
- Assign an Agent, Team, Priority, Label, and status to track the progress of each conversation.
- Collaborate internally using Private Notes, @Mentions, and Participants without exposing internal content to customers.
- Use Canned Responses and Quick Actions to speed up repetitive tasks.
- Use Chathot Agent to look up previous conversations, Contact information, and the Knowledge Base within your permitted data scope.
- Stay on top of work through My Inbox, audio alerts, and Push Notifications.

For Administrators

- Connect and manage the communication channels supported by Chathot.
- Manage Agents, Teams, Collaborators, Labels, Custom Attributes, Custom Roles, and conversation visibility.
- Configure Inboxes, Business Hours, Auto Assignment, SLA, and CSAT to match operational requirements.
- Configure the AI Customer Assistant, System Prompts, Knowledge Base, Assignment Rules, and API Keys when using AI features.
- Monitor operational reports, CSAT results, and Audit Logs.

System Requirements

- Your organization must have an AI Chathot environment deployed and a valid system URL.
- User accounts must be created by an Administrator and activated through an email invitation; self-registration is not supported.
- An Agent must be added to the relevant Inbox as a Collaborator before they can view, receive, and handle conversations from that channel.
- Each third-party channel has its own connection requirements. Some channels require a platform app, token, API key, or webhook to be configured in advance as described in this guide.
- Webhooks and Push Notifications require an HTTPS environment that meets the requirements of the relevant platform.
- If the AI Customer Assistant is used, at least one valid Gemini API Key must be configured under Settings > AI Agent > API Key.

This guide explains how to operate Chathot and is intended for two user groups:

Support Agent - handles customer conversations on a daily basis. Read Part A and Part B.

Administrator - configures the system, connects channels, and manages users. Also read Part C.

All content in this guide has been checked against the live system. Features that are not currently working are clearly identified where they appear, together with available workarounds, so you do not waste time trying unsupported functions.

If you are an Administrator setting up the system for the first time, start with Part 14 - Initial Setup Roadmap.

If you are a new Agent with only 15 minutes, read Part 3 - Availability Status, Part 4 - Conversation Workspace, Part 6 - Replying to Customers, and Part 12.3 - Enable Notifications.

What's new in version 1.3 (24/09/2026)

Seven new channels: TikTok Shop, Lazada, Shopee, Telegram, LINE, WhatsApp, and Google Business Profile. See Sections 15.6 to 15.13.

Browser push notifications are now fully supported. See Section 12.5.

Individual Agent shifts are now available under Settings > Shifts. See Section 17.13.

You can now delete messages (Section 6.8), review previous conversations with the same customer (Section 4.4), and resize the message composer (Section 6.7).

Zalo can now request customer information automatically (Section 19.2); custom branding and IP display controls are available in Audit Logs (Section 22.1); and the Website chat identity verification key can be rotated (Section 16.6).

Part A - Getting Started

1. System Overview

Chatbot brings customer messages from multiple channels into one workspace, so the support team can respond from a single place instead of switching between five or six different applications. The system also includes an AI assistant that can automatically reply when no Agent is available.

Supported Channels

Channel	Where customers message from
Website	Embedded chat widget on the company website
Facebook Messenger	Messages sent to the Facebook Page
Instagram	Direct messages sent to the Instagram account
Zalo OA	Messages sent to the Zalo Official Account
Email	Email sent to the support mailbox
TikTok	Direct messages through TikTok Business Messaging
TikTok Shop	Buyer messages related to orders on TikTok Shop
Lazada	Buyer messages sent to the Lazada store
Shopee	Buyer messages sent to the Shopee store (Shopee approval required; see Section 15.9)
Telegram	Messages sent to the company Telegram bot
LINE	Messages sent to the LINE Official Account
WhatsApp	Messages sent to the WhatsApp Business number
Google Business Profile	Customer reviews on Google. This is not a chat channel; each review becomes a separate conversation.

Two User Roles

Support Agents respond to customers, receive and transfer conversations, apply labels, and view or update contacts. Agents do not see the full Settings menu.

Administrators have all Agent permissions, plus the ability to connect channels, manage users and teams, create labels, configure the AI assistant, and view satisfaction reports.

The system also supports Custom Roles, which let you grant selected administrative permissions to an Agent without promoting them to Administrator. At present, the only delegable permission is Inbox management.

Three Concepts to Understand Before You Start

An Inbox is a connected channel. For example, “Company Fanpage” can be one Inbox and “Website Chat” another. Each Inbox has its own list of Collaborators, and an Agent can only see conversations from Inboxes where they are a Collaborator. This is the most common reason behind the question, “Why can’t I see anything after logging in?”

A Conversation is a message thread between the system and a customer within a specific Inbox.

A Contact is the customer profile. If the same person messages you on Facebook and on the website, the system creates two separate Contacts because it does not automatically know they are the same person. Use Merge Contacts to combine them.

Conversation Lifecycle

![[image1]]

Conversation lifecycle, from the customer’s first message to closure

Status	What happens at this stage
OPEN	The system can auto-assign an Agent if enabled. The AI Customer Assistant can reply automatically if enabled and no Agent has joined the conversation.

PENDING	Waiting for the customer to reply or for another department to provide information.
SNOOZED	Returns to OPEN automatically at the scheduled time. A new customer message also reopens it immediately.
RESOLVED	Sends a CSAT survey if enabled. If the customer messages again, Website reopens the same conversation, while other channels (Facebook, Instagram, Zalo, TikTok, marketplace channels, Telegram, LINE, WhatsApp) create a new conversation.

2. Login and Interface Basics

2.1 First-Time Login

Open your company's Chathot URL, for example <https://chat.company.com/app>.

Your account is created by an Administrator, who sends you an email invitation. Self-registration is not available, so you must wait for an invitation.

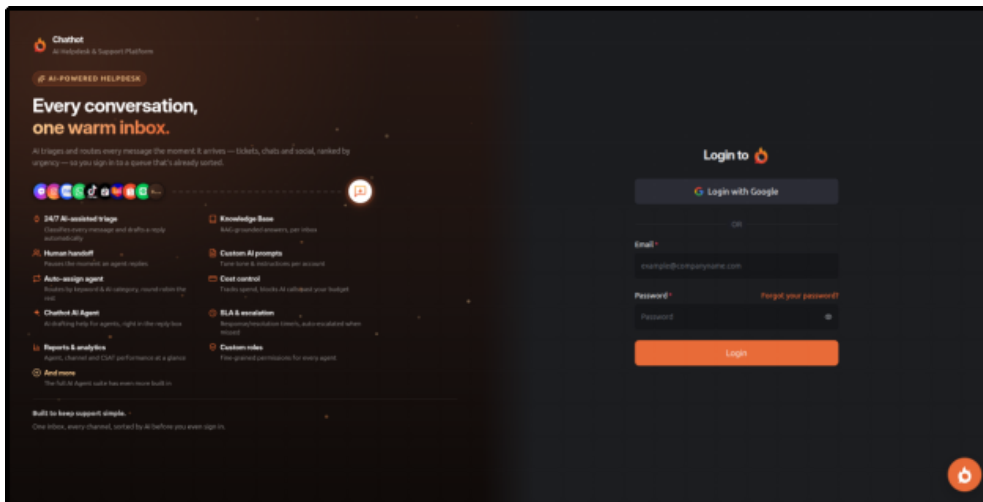
Account activation has three steps:

1. An Administrator creates your account and the system sends you an invitation email.
2. Open the email, follow the link, and set your password. This step is required; you cannot sign in until a password has been set.
3. Sign in with your company email address and the password you just created.

If you forget your password, click [Forgot password?](#) on the login screen and follow the instructions in the email you receive.

Some companies also enable Sign in with Google. This option only works for accounts that already exist in Chathot; it does not create a new account automatically.

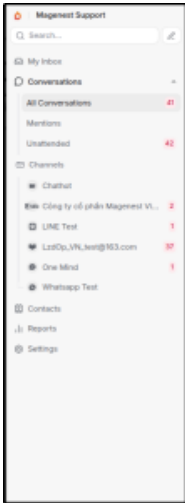
Your login session remains active for two months, so you do not need to sign in again every day.



Login screen

2.2 Screen Layout

The left-hand column is the main navigation sidebar. Click the icon at the top of the sidebar, or press **Alt + O**, to collapse or expand it.



Expanded left navigation sidebar

Menu item (English)	Vietnamese label	Description
Inbox	My Inbox	Your personal notification list
Conversations	Cuc trò chuy n	Main working area
- All	T t c cuc trò chuy n	All conversations you are authorized to view
- Mentions	Nhn n	Conversations where someone mentioned you
- Unattended	Kh ng giám sát	Customer has sent a message but no one has replied yet
- Folders	Th mc	Saved conversation filters
- Teams	Nhóm	Filter conversations by Team
- Channels	Hp th n	Filter conversations by channel/Inbox
- Labels	Nhãn	Filter conversations by Label
Contacts	Liên h	Customer directory
Settings	Cài t	Agents only see Canned Responses; Administrators see the full Settings menu

The top bar contains the search field, notification bell, and your profile avatar.

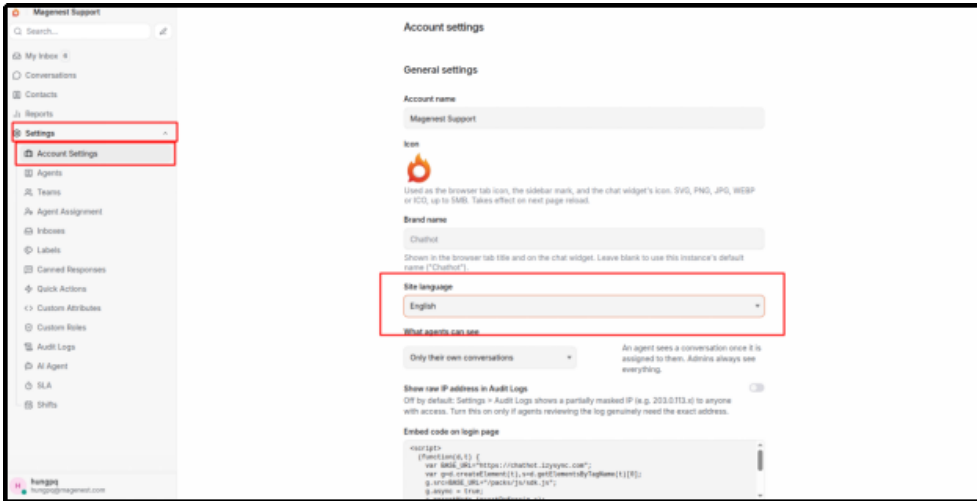
2.3 Switch the Interface to Vietnamese

Click your avatar in the upper-right corner, select Profile Settings, open Interface, choose Vietnamese, and click Save.

The interface supports 40 languages. The Vietnamese translation is approximately 97% complete, so some less common labels may still appear in English. This is expected and does not indicate an error.

A few machine-translated labels can sound unusual. For example, Agents may appear as “i lý” in Vietnamese, although it refers to support staff, and Mentions may appear as “Nhn n,” meaning conversations where someone mentioned you.

Administrators can set the company-wide default language under Settings > Account Settings. This default applies to users who have not selected their own preferred language.



Interface settings in Profile Settings, where you can change the language and font size

3. Your Availability Status

Click your avatar to select your working status.

Status	Meaning
Online	Available for work. Only Agents with this status can receive new conversations through Auto Assignment.
Busy	Still signed in, but not eligible for automatic conversation assignment.
Offline	Not available and not eligible for automatic conversation assignment.

You can also enable Auto offline, which automatically changes your status to Offline after a period of inactivity.

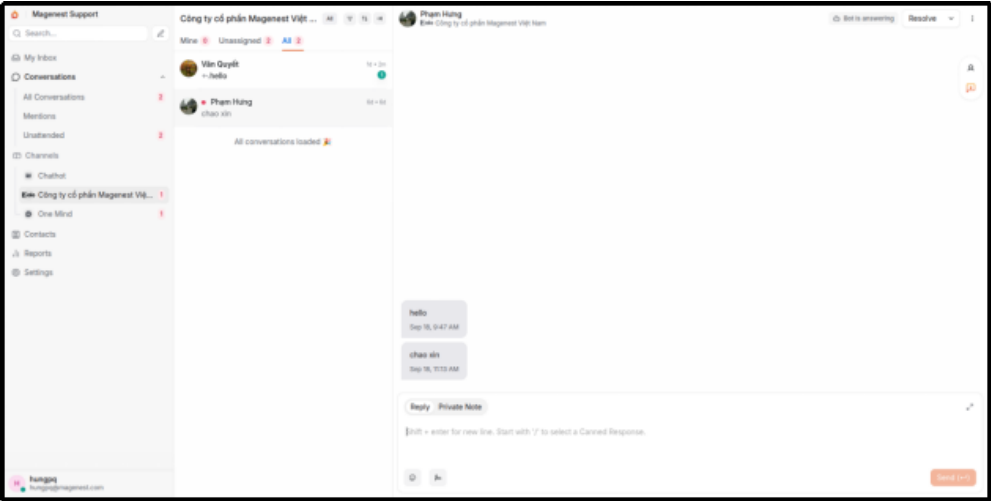
This setting can cause operational issues if it is overlooked. If Auto Assignment is enabled but every Agent is Offline, new conversations will not be assigned and will remain in the Unassigned tab. The system does not display a warning. For this reason, the first thing you should do at the start of every shift is set your status to Online.

If you use Auto offline and tend to leave Chatbot open while away from your computer, check your status whenever you return.

Part B - Daily Work for Support Agents

4. Conversation Workspace

The Conversation workspace is divided into three columns.



The three columns in the Conversation workspace and what each one contains

Column	Contents
Left column	Conversation list with three filter tabs: Mine, Unassigned, and All
Middle column	Conversation content. Customer messages appear on the left, your messages on the right, and Private Notes on a yellow background. The message composer at the bottom has Reply and Private Note tabs.
Right column	Contact information, conversation actions, Participants, Custom Attributes, Previous Conversations, and customer Notes

4.1 Left Column - Conversation List

![[image6]]

Conversation list with the Mine, Unassigned, and All tabs. Each row shows the customer name, latest message, labels, and unread count.

Three tabs filter conversations by assignee:

Tab	Contents	When to use it
Mine	Conversations assigned to you	Default view when you open the application; these are your active cases
Unassigned	Conversations with no Assignee	Monitor this regularly because these conversations are waiting for someone to take ownership
All	All conversations you can access	Use when you need an overall view

Each row shows the customer's avatar and name, a preview of the latest message, the Inbox name with its channel icon, unread message count, Priority indicator when applicable, assigned Labels, and the time of the most recent activity.

If the customer has not provided a name, the system assigns a simple random name so you can distinguish them from other contacts.

The list updates in real time. New messages appear immediately without requiring a page refresh. Conversations load in batches of 25; scroll down to load more.

4.2 Middle Column - Conversation Content

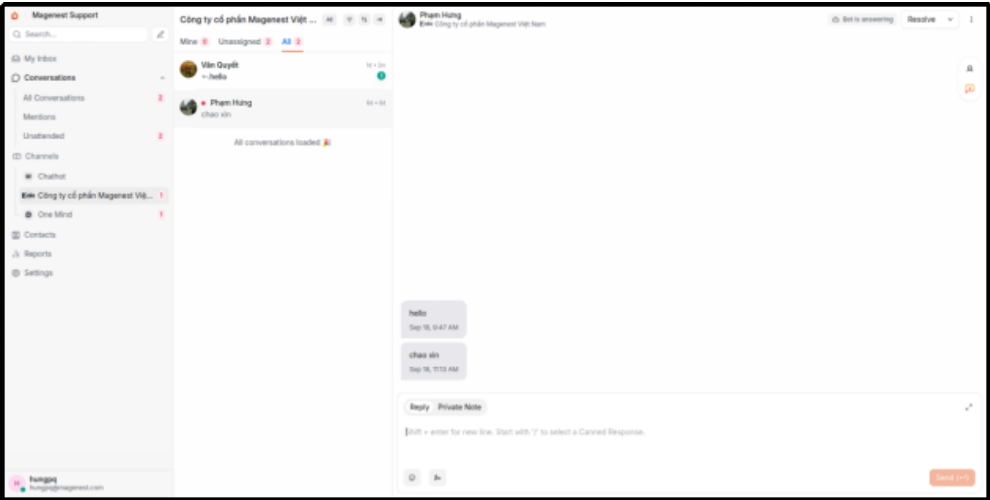
Customer messages appear on the left and your messages appear on the right. Private Notes are highlighted with a yellow background and are never visible to the customer.

Messages sent by the AI assistant appear like normal outgoing messages and do not have a separate label.

Each outgoing message shows a delivery status underneath it. See Section 6.5 for details.

4.3 Right Column

See Section 11.



Full Conversation workspace: conversation list on the left, message thread in the center, and customer details on the right

4.4 Review Previous Conversations with the Same Customer

When a customer has multiple conversations—for example, each time you mark a conversation Resolved and the customer later messages again, a new conversation is created—Previous Conversation and Next Conversation buttons appear above and below the message thread. Each button shows the latest message and the start date of that conversation. Use them to move directly between adjacent conversations from the same customer without returning to the list or opening Contacts.

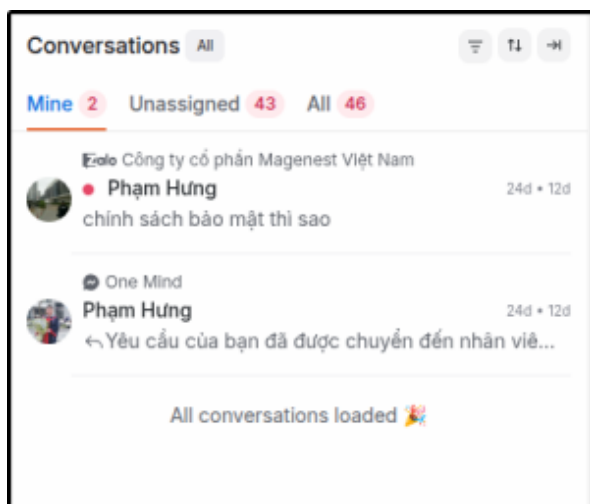
When you are viewing an older conversation rather than the customer’s latest conversation, the message composer is collapsed to help prevent accidental replies to an old thread. A bar appears instead with two options: Reply to this previous conversation, which reopens the composer, or Go to the latest conversation.

5. Search and Filter Conversations

5.1 Quick Filters

These are the filters most commonly used in day-to-day work. All filters query the server directly, so results are complete and accurate.

Purpose	Action
Filter by status	Use the dropdown at the top of the left column: Open, Pending, Resolved, Snoozed, or All. Default: Open
Filter by Assignee	Use the Mine, Unassigned, and All tabs
Find conversations no one has replied to	Select Unattended in the sidebar
Find conversations where you were mentioned	Select Mentions in the sidebar
Filter by channel	Select Channels in the sidebar, then choose an Inbox
Filter by Label	Select Labels in the sidebar, then choose a Label
Filter by Team	Select Teams in the sidebar, then choose a Team



Top of the list: status chip, three filter tabs with counts, and advanced filter and sort controls

5.2 Search

Use the search field in the top bar. Results are divided into four tabs: All, Contacts (customer name, email, and phone number), Conversations, and Messages (message content).

Search is case-insensitive and supports partial matches. For example, searching for “hoan” can return both “Hoàng” and “hoàn tin.”

The system remembers your recent search terms so you can reuse them quickly.

The search page also supports advanced filters by date range, Inbox, and Agent, but these are commercial-edition features and are not available in this version.

5.3 Advanced Filters, Folders, and Segments

For more complex conditions, click the Filter button (funnel icon) above the conversation list.

You can filter by the following criteria:

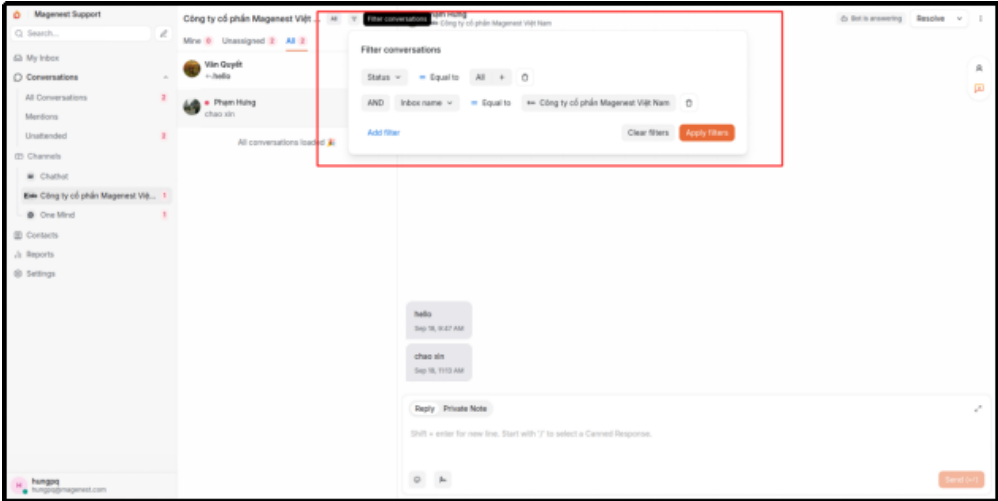
Filter field	Available operators
Status, Priority	equals, not equal to
Assignee, Inbox, Team	equals, not equal to, assigned, unassigned
Label	equals, not equal to, has label, has no label
Conversation ID	equals, not equal to, contains, does not contain
Created date, Last activity	before date, after date, N days ago
Browser language, Referrer page, Email subject	equals, not equal to, contains, does not contain
Company Custom Attributes	depends on the data type

Combine multiple conditions with AND or OR. Note that conditions are evaluated from top to bottom rather than using mathematical precedence. In other words, A AND B OR C is interpreted as (A AND B) OR C. If a filter becomes too complex, split it into two separate Folders to make it easier to manage.

Save as a Folder. After configuring the filter, save it and give it a name. The Folder appears under Conversations > Folders in the sidebar; selecting it reruns the same filter. Folders are private to each user within the company, so colleagues cannot see yours.

Segments provide the equivalent feature for Contacts. You can filter customers by name, email, phone number, identifier, country, city, company, label, creation date, blocked status, or Custom Attribute, then save the result for repeated use.

Practical example: create a Folder named “Urgent - Unassigned” with Priority = Urgent AND Assignee = Unassigned, then review it several times a day.

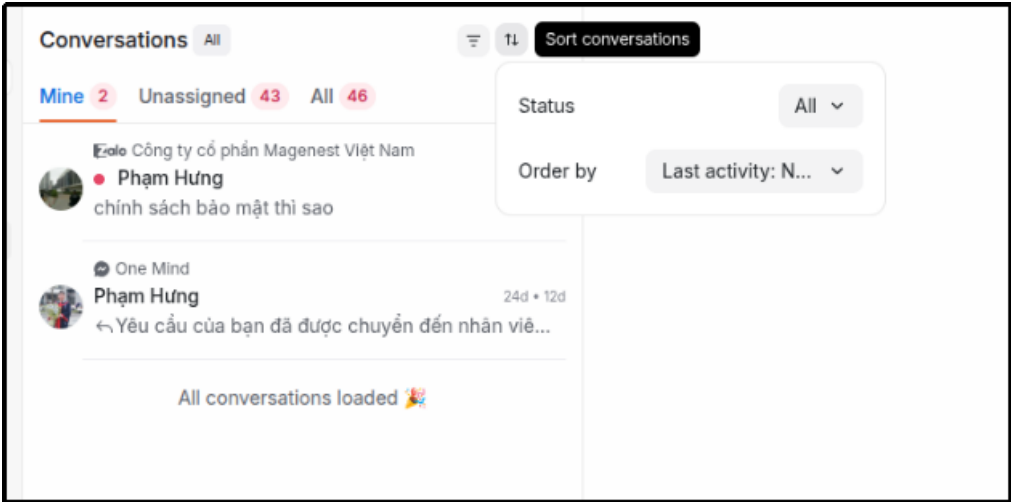


Advanced filters: choose the criterion, operator, and value, then combine conditions with AND or OR

5.4 Sort the Conversation List

The Sort by menu sorts the full server-side list, not just the conversations currently visible on screen.

Option	Meaning
Last activity	Default. Conversations with the most recent activity appear first.
Created date	Show the oldest or newest conversations first.
Priority	Show the highest-priority conversations first.
Waiting time	Show customers who have waited the longest first, which is useful for preventing conversations from being overlooked.



Sort by menu

6. Replying to Customers

The message composer appears below the middle column and has two tabs:

Reply - content the customer can see

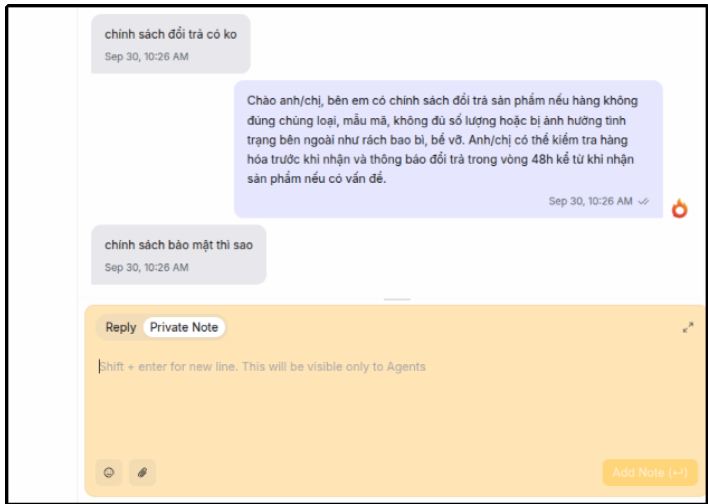
Private Note - internal-only content that the customer cannot see

Always check that you are on the correct tab before typing.

6.1 Composer Controls

Button	Purpose
Emoji icon	Insert an emoji
Paperclip icon	Attach a file. See channel-specific limits in Section 6.4.
Microphone icon	Record and send a voice message on supported channels
Signature icon	Enable or disable your personal signature for this message

Create your personal signature under Profile Settings > Message Signature. When the signature button is enabled, the signature is appended automatically to each message you send. The system does not add it again if you have already typed the same signature in the composer.



Message composer with Reply and Private Note tabs, plus emoji, attachment, voice recording, and signature controls

6.2 Message Composer Shortcuts

Key	Action
Enter	Send message
Shift + Enter	Insert a new line without sending
Alt + L	Switch to the Reply tab
Alt + P	Switch to the Private Note tab
Ctrl + Alt + A (Mac: Cmd + Alt + A)	Open the file attachment dialog
/	Insert a Canned Response; see Section 7

See Section 24 for the full list of keyboard shortcuts.

6.3 Auto-Saved Drafts

If you start typing and switch to another conversation, your draft is still there when you return. The system saves separate drafts for the Reply and Private Note tabs.

Important: drafts are stored in your browser, not on the server. If you switch devices or clear browser data, your drafts will be lost.

6.4 File Attachments - Capabilities Vary by Channel

This is one of the easiest areas to misunderstand, so make sure you know the channel limitations before promising a customer that you can send a file.

Channel	Customer can send files to you	You can send files to the customer
Email	Yes	Yes
Facebook Messenger	Yes	Yes, but text and files are sent as separate messages: the text first, followed by each file as its own message.
Instagram	Yes; content can be viewed	No. Outbound messages support text only.
Zalo OA	Yes; images and files can be viewed	No. Outbound messages support text only.
Website	Yes	Yes
TikTok, TikTok Shop	Yes: text and images. TikTok Shop also displays product cards and order cards.	No. Outbound messages support text only.
Lazada	Yes: text, images, emoji, and video (preview image only; video playback is not supported).	No. Outbound messages support text only.
Shopee	Yes: text, images, and video (preview image only).	No. Outbound messages support text only.
Telegram	Yes: images, video, voice messages, files, stickers, locations, and contact cards.	No. Outbound file messages are not supported; text supports bold, italic, strikethrough, code, and links.
LINE	Yes: images, video, audio, files, and stickers.	Images and video are supported. Other file types are not.
WhatsApp	Yes: images, video, audio, and documents.	No. Outbound messages support text only.
Google Business Profile	Customer review content (star rating and text); no files.	Text only, posted as the public reply beneath the review.

The maximum file size is 25 MB per file.

For channels that currently support text-only outbound messages (Zalo, Instagram, TikTok, marketplace channels, Telegram, and WhatsApp), upload the document to a file-sharing service and send the download link instead of attaching the file directly.

6.5 Message Status and Send Failures

Each outgoing message shows one of the following statuses underneath it: Sending, Sent, Delivered, Read, or Failed.

Common reasons for a Failed status include:

Channel	Common cause
Facebook, Instagram, Zalo	More than 24 hours have passed since the customer's last message. This is a platform policy, not a Chathot error.
Facebook, Instagram, Zalo	The channel connection has expired and must be reconnected by an Administrator.
WhatsApp	More than 24 hours have passed since the customer's last message (WhatsApp policy, and Chathot does not yet support template messages for reopening the window), or the temporary Meta access token has expired. See Section 15.12.
TikTok Shop, Lazada, Shopee	The store connection has expired or the seller revoked authorization. Reconnect the channel.
Telegram, LINE	The token was revoked or changed on Telegram/LINE. Paste the new token into the Inbox configuration.
Email	The Inbox does not have an outgoing mail server configured, or the Contact does not have an email address.

The system does not automatically retry failed messages. You must compose and send the message again manually.

6.6 Chathot Agent - Private AI Assistant for Agents

Chathot Agent is different from the AI assistant described in Section 19. The assistant in Section 19 can reply directly to customers, while Chathot Agent is a private assistant visible only to you and is intended to help while you are preparing a response.

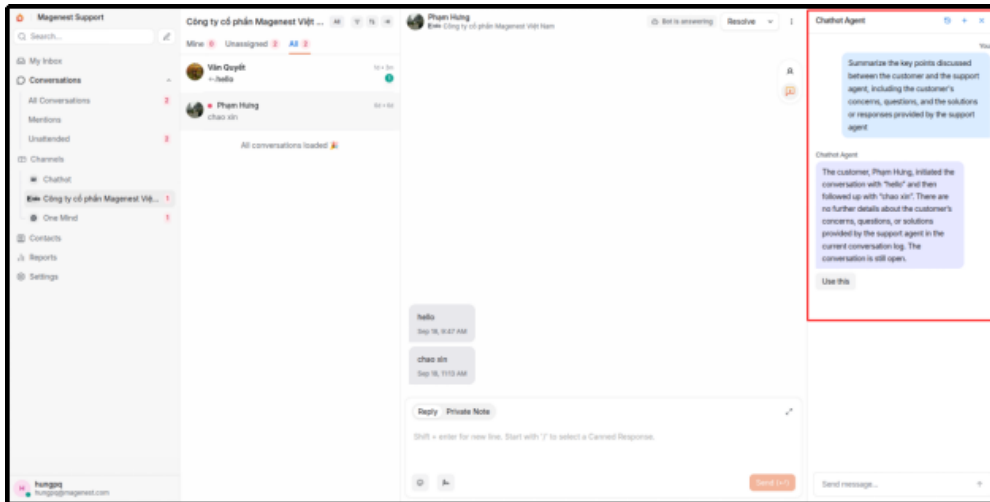
Open it by clicking the AI button in the pair of floating circular buttons at the upper-right of the Conversation workspace. The adjacent person icon opens the Contact Information panel described in Section 11. Only one of the two panels can be open at a time.

You can ask Chathot Agent to look up previous conversations, find information about a Contact, or search the company Knowledge Base. It only uses data that you are personally authorized to access, so it does not expose conversations or Contacts outside your permissions.

Your chat with Chathot Agent is not tied permanently to a specific conversation. If you move to another conversation, your chat history with the assistant remains available; only the “currently viewing” context changes so the assistant can respond more accurately.

Click Show steps on any response to see which lookups the assistant performed before answering.

Everything you ask and everything Chathot Agent returns is visible only to you. Nothing is sent to the customer, and you do not need Administrator permissions to use it.



Chathot Agent answering a question about the conversation currently being viewed

6.7 Resize the Message Composer

Drag the top edge of the composer to make it taller or shorter, or use the expand button when writing a longer message. The height you choose is retained across conversations. For Email, the composer and quoted-message area share the available height.

6.8 Delete a Message

Right-click the message, choose Delete, and confirm in the dialog. Keep the following points in mind before using this action:

Any Agent who can see the conversation can delete any message in it, including messages from colleagues and Private Notes. Administrator access is not required.

The message content is replaced with “This message was deleted,” and any attachment is removed. The message remains in its original position in the thread rather than disappearing completely.

Deletion cannot be undone and only removes the copy stored in Chathot. Messages already delivered to customers on Facebook, Zalo, Telegram, and other channels are not recalled and remain visible to the customer.

Administrators can review the original deleted content under Settings > Audit Logs. See Section 17.12.

7. Canned Responses

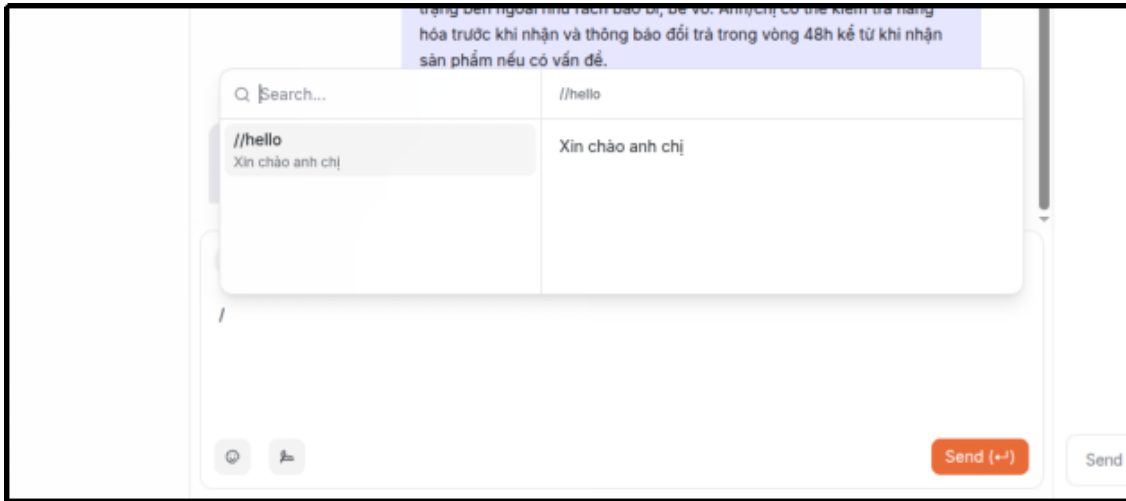
Canned Responses are prewritten message templates for recurring replies, such as greetings, return instructions, apologies for delayed responses, or requests for order information.

7.1 Use a Canned Response

In the composer, type / and begin entering the Canned Response short code. A suggestion list appears; select the response you want and its content is inserted directly into the composer.

You can edit the inserted content before sending it, for example to add the customer's name or order number.

Example: type /chao to insert “Hello, I'm a support agent from Company ABC. How can I help you today?”



Type / in the composer to open the Canned Response list, then select a template to insert its content

7.2 Create and Manage Canned Responses

Go to Settings > Canned Responses. Unlike most Settings pages, every Agent can create and edit Canned Responses; this is not restricted to Administrators.

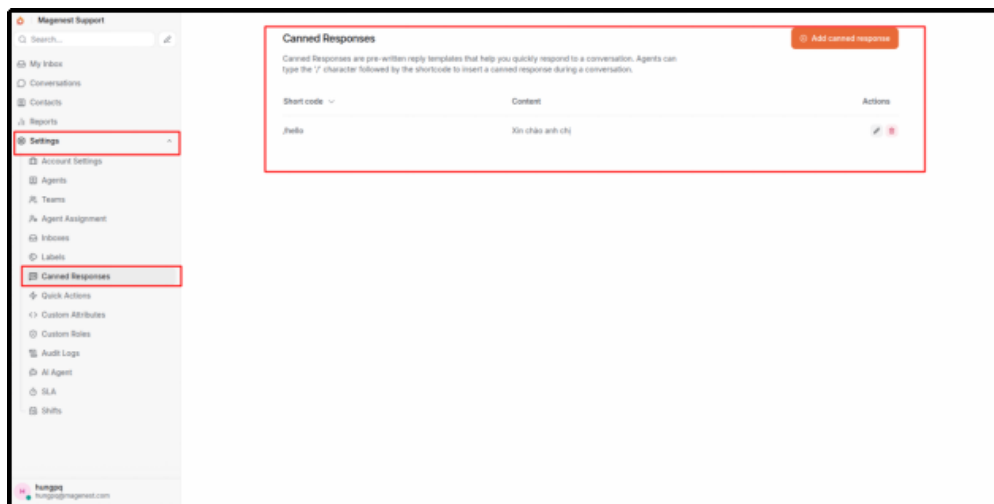
Each Canned Response contains two fields:

Short code - the code you type after /. Keep it short, simple, and easy to remember, for example chao, doitra, xinloi, or madon. Short codes must be unique within the company.

Content - the text that will be inserted into the composer.

Canned Responses are shared company-wide. Once one user creates a response, everyone can use it.

Use the search field on this page to find a response quickly when the list becomes long.



Canned Response management page under Settings > Canned Responses

7.3 Suggested Starter Set

Short code	Use case
chao	Opening greeting
madon	Ask for the order number
doitra	Summarize the return/exchange policy

xinloi	Apologize for a delayed response
chuyenkt	Tell the customer the case is being transferred to Technical Support
camon	Closing thank-you message

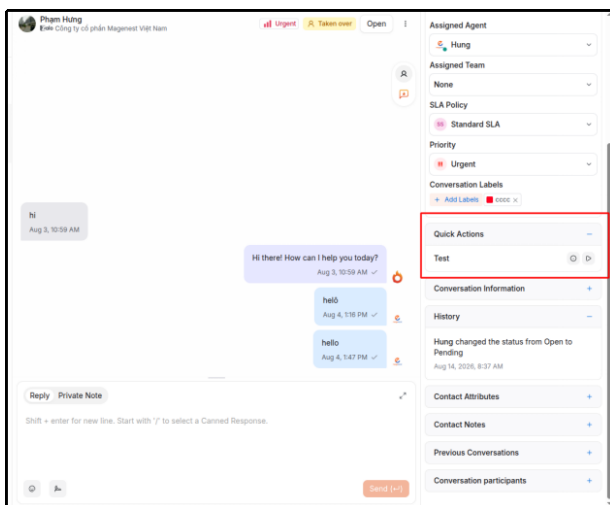
7.4 Quick Actions - Run Multiple Actions at Once

A Quick Action is a predefined sequence of actions—such as assigning an Agent, assigning a Team, changing status, applying a Label, sending a message, or adding a Private Note—that runs with a single click instead of requiring each step to be completed manually.

Open the Quick Actions accordion in the right-hand panel of the Conversation workspace and click the run button for the action you want to use. The system immediately performs the configured actions on the open conversation.

Quick Actions can only run on conversations you already have permission to view, just like any other action in the system.

A few action types can be selected when building a Quick Action but currently do nothing when executed: sending an attachment, calling an external webhook, and emailing a conversation transcript. The system only records a warning in the log and does not show an error to the user. If a Quick Action appears to do nothing, check whether it contains one of these three action types.



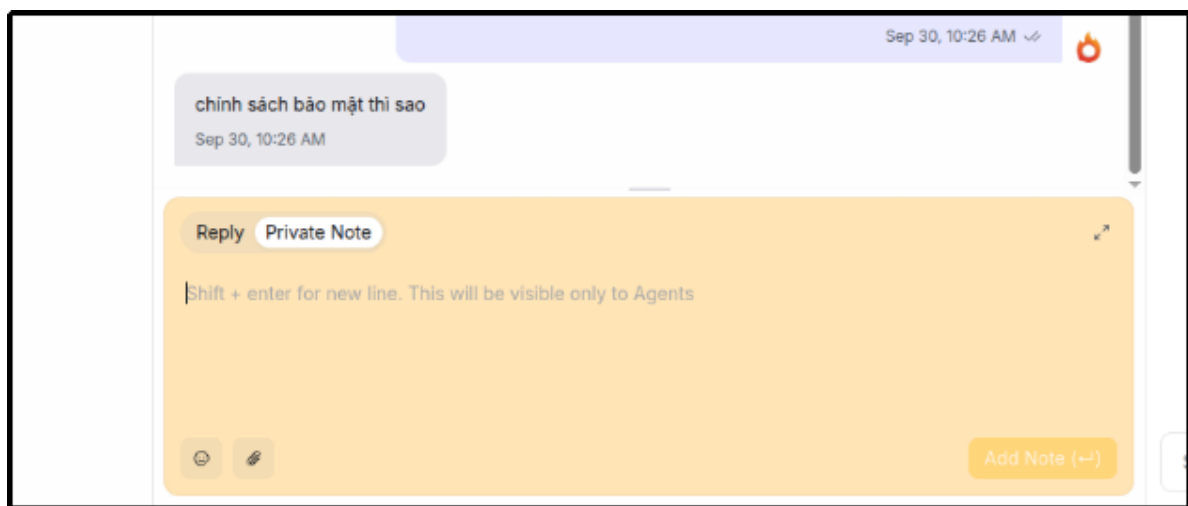
Quick Actions accordion in a conversation, ready to run

8. Internal Notes and Mentions

8.1 Private Notes

Select the Private Note tab, or press Alt + P, before typing. Private Notes use a yellow background and are never visible to the customer.

Use Private Notes to record information confirmed with another department, leave handover instructions for the next shift, or explain why a case was handled in a particular way.



Private Note tab in the composer. Content entered here is not visible to the customer.

8.2 Mention a Colleague with @

In a Private Note, type @ followed by the name of the person or Team you want to mention. If you mention a Team, all members of that Team are notified.

The mentioned user receives an immediate notification and an audio alert if enabled, sees the conversation under Mentions, and is added to the conversation's Participants list. From that point onward, they receive notifications whenever the conversation has a new message.

Important limitation: you can only mention someone who is a Collaborator on that Inbox or an Administrator. If you mention someone outside that list, the system silently ignores the mention and they receive nothing. If a colleague says, "I didn't get the notification," first check whether they have been added as a Collaborator on the Inbox.

8.3 Automatic Private Notes When Work Is Routed

When an automatic Assignment Rule routes a conversation to you or your Team, the system creates a Private Note explaining why: which rule matched, which keyword or topic triggered it, which Team it was routed to, and who was assigned.

This note gives you immediate context on why the conversation was routed to you instead of leaving you to infer the reason.

8.4 Conversation Participants

Users are added to the Participants list automatically in two situations: they are @mentioned in a Private Note, or they are assigned to the conversation.

You can also add or remove Participants manually from the right-hand panel. As with mentions, you can only select users who are Collaborators on the Inbox or Administrators.

9. Managing Conversations

9.1 Four Conversation Statuses

Status	When to use it
Open	The conversation is being handled.
Pending	Waiting for the customer or another department to respond.
Resolved	The work is complete. If CSAT is enabled for the Inbox, the survey is sent at this point.
Snoozed	Temporarily hide the conversation until a scheduled time.

9.2 What Happens When a Customer Messages Again After Resolution

The system handles this automatically; you do not need to monitor it manually. Behavior varies by channel:

Website: the new message reopens the same conversation. Its status automatically returns to Open and the conversation reappears in the active work list.

Facebook, Instagram, Zalo, TikTok, TikTok Shop, Lazada, Shopee, Telegram, LINE, and WhatsApp: the resolved conversation remains closed and the new message creates a new conversation. For Facebook, Telegram, and WhatsApp, you can enable Lock to single conversation in the Inbox Settings tab to keep all messages in one conversation.

Google Business Profile: each review is always a separate conversation, so there is no concept of a customer "replying" to the same conversation.

Email: replies are added to the existing conversation and reopen it; a new email that is not a reply creates a new conversation.

If your company wants all messages from the same customer to remain in a single conversation, an Administrator can enable Lock to single conversation in the Inbox Settings tab. The system will then reuse and reopen the existing conversation instead of creating a new one.

The only exception is a conversation that has been Muted. See Section 9.7.

9.3 Snooze - Temporarily Hide a Conversation Until Later

Click Snooze, or press Alt + M, then choose one of the available options: in 1 hour, tomorrow, next week, next month, or a custom date and time.

At the scheduled time, the system automatically returns the conversation to Open. The scheduler runs every minute, so reopening may occur up to one minute later than the selected time. If the customer sends a message before the snooze expires, the conversation reopens immediately.

Snooze is useful when you have told the customer, for example, "I'll update you tomorrow," and you do not want the conversation taking up space in today's active work list.

9.4 Assign an Agent

Use the Assignee menu at the top of the conversation. The list only includes Collaborators from that Inbox. Select None to remove the assignment.

You can also assign the conversation to a Team instead of a specific person. This is useful when the case belongs to a department and any available Team member can take it.

9.5 Priority

There are four levels: Low, Medium, High, and Urgent.

The AI assistant can also set the Priority when classifying a customer message. AI can raise the Priority but never lower it. For example, if you have manually set a conversation to Urgent, AI will not reduce it to Low.

The Priority indicator appears directly on the conversation row, making urgent cases easy to identify at a glance.

9.6 Labels

You can apply multiple Labels to a conversation. Labels must first be created by an Administrator under Settings > Labels.

Labels can also be used as conditions for CSAT surveys. For example, the company can configure a rule that prevents surveys from being sent for conversations labeled spam.

9.7 Mute and Send Transcript

Mute conversation in the three-dot menu closes the conversation and prevents it from reopening automatically for 6 days, even if the customer continues to send messages. Use this for spam or repeated meaningless messages. Click Unmute to remove the mute state.

Send transcript, which is intended to email the conversation transcript to the customer, is not currently working.

9.8 Is the Bot Replying, or Are You in Control?

For Inboxes with the AI assistant enabled, a control at the top of each conversation shows who is currently responsible for replying to the customer.



The control showing who is currently handling the conversation appears next to Resolve.

Control shown	Meaning	When clicked
Bot is answering	The AI Customer Assistant is allowed to reply to the customer in this conversation.	Take over; the AI stops replying immediately.
You have taken over	The AI is silent and the conversation is waiting for a human Agent.	Hand the conversation back to the bot.

Keep three things in mind when using this control.

First, replying to the customer automatically takes over the conversation; you do not need to click anything else. Use this control when you want to stop the bot before you have time to type a reply—for example, if you open the conversation and can immediately see that the customer is upset.

Second, takeover remains in effect until someone explicitly hands the conversation back to the bot. There is no automatic timer that allows the bot to resume, so it is safe to leave the conversation in Pending while waiting for the customer to reply.

Third, when the AI assistant hands a conversation over on its own, a reason appears directly below the control—for example, “the bot could not find sufficiently relevant documentation” or “the customer repeated the same question.” Read this message before replying because it tells you where the AI got stuck.

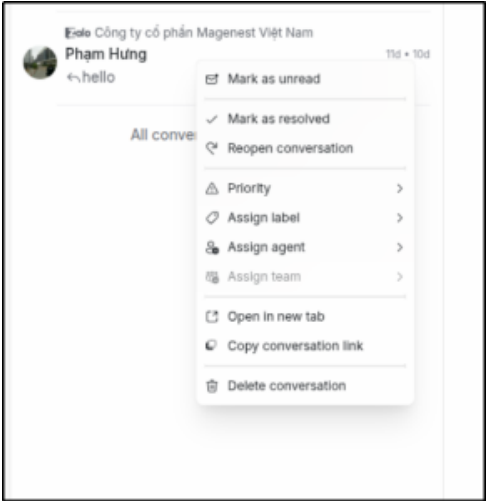
If a Resolved conversation is reopened because the customer comes back with a new request, it automatically returns to Bot is answering because this is treated as a new support interaction.

10. Right-Click Menu and Bulk Actions

10.1 Right-Click Menu on a Conversation

Right-click a conversation in the list to access common actions quickly:

Action	Notes
Mark as read	Mark the conversation as read.
Mark as unread	Mark it as unread; useful when you have reviewed it briefly but are not ready to handle it.
Change status	Open, Pending, or Resolved
Snooze	Temporarily hide until a scheduled time
Set Priority	
Assign Label	
Assign Agent	
Assign Team	
Open in new tab	
Copy conversation link	Paste the link into an internal chat so a colleague can open the exact conversation.
Delete conversation	Cannot be undone.



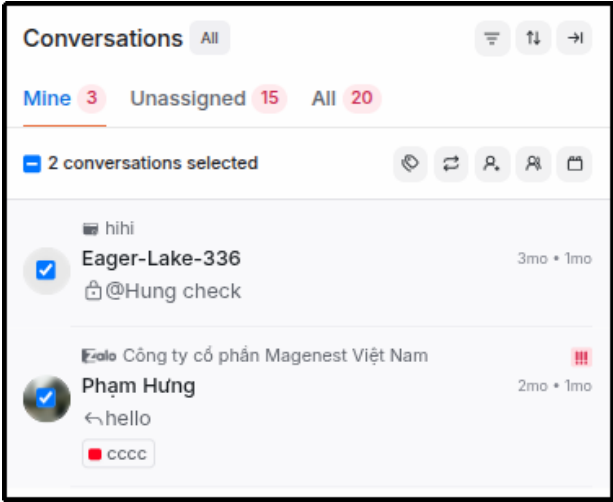
Right-click menu on a conversation row

10.2 Bulk Actions for Multiple Conversations

Hover over a conversation row to reveal its checkbox. Select multiple conversations, then use the toolbar that appears above the list.

Available bulk actions include changing status, assigning an Agent, assigning a Team, adding or removing Labels, and snoozing conversations.

Typical use case: at the end of the week, filter for Open conversations, select older conversations that have already been handled, and Resolve them in one action.



When multiple conversations are selected, the toolbar provides actions for Labels, status, Agent assignment, and Team assignment.

11. Right-Hand Information Panel

This panel contains several collapsible sections. You can drag and reorder them to match your preferred workflow.

Section	Contents
Contact Information	Name, email, phone number, and avatar. Edit directly here and save immediately.
Conversation Actions	Status, Assignee, Team, Priority, Labels, and SLA Policy
Participants	Users following the conversation. Add or remove them manually.
Conversation Info	Channel, creation time, and—for Website—customer browser and operating system.

Custom Attributes	Company-specific fields defined by an Administrator, for example order number.
Previous Conversations	Earlier conversations with the same customer.
Notes	Customer-level notes, including author and timestamp.
SLA	Response and resolution targets. When an SLA Policy is assigned, countdown timers appear at the top of the conversation and turn red when overdue.

Two sections are especially useful in day-to-day work:

Check Previous Conversations before replying. If the customer has asked about the same issue before, you can avoid making them explain everything again.

Notes differ from Private Notes in a conversation because Notes are attached to the Contact and therefore appear across all conversations for that customer. Use them for long-term information such as “customer prefers phone calls over messaging” or “company is currently negotiating a contract.”

History records every conversation status change—who changed it, what it changed to, and when—including automatic changes made by the system, such as reopening a conversation when the customer replies. This section is read-only.

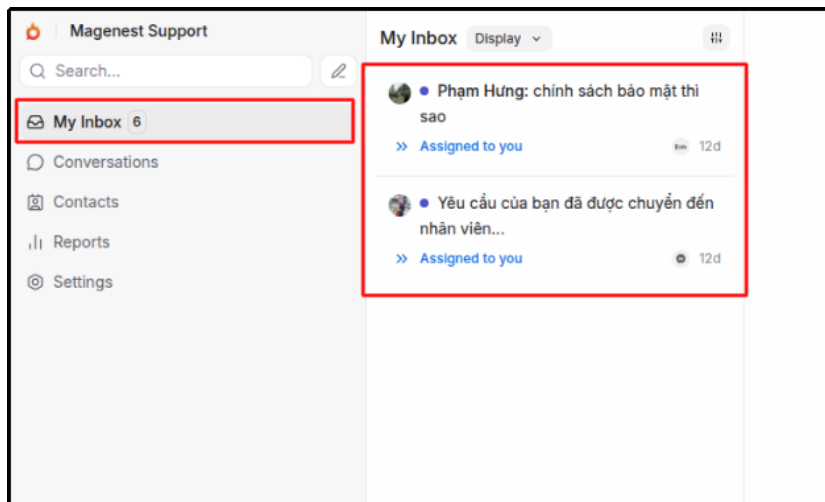
12. Notifications and My Inbox

12.1 Notification Bell

The bell in the top bar shows the number of unread notifications and updates in real time.

12.2 My Inbox

My Inbox is the first item in the sidebar and contains your complete notification list. From here, you can mark individual notifications as read or unread, mark all as read, delete one or all notifications, and snooze a notification.



My Inbox screen

12.3 First Setup Step: Enable “New Conversation” Notifications

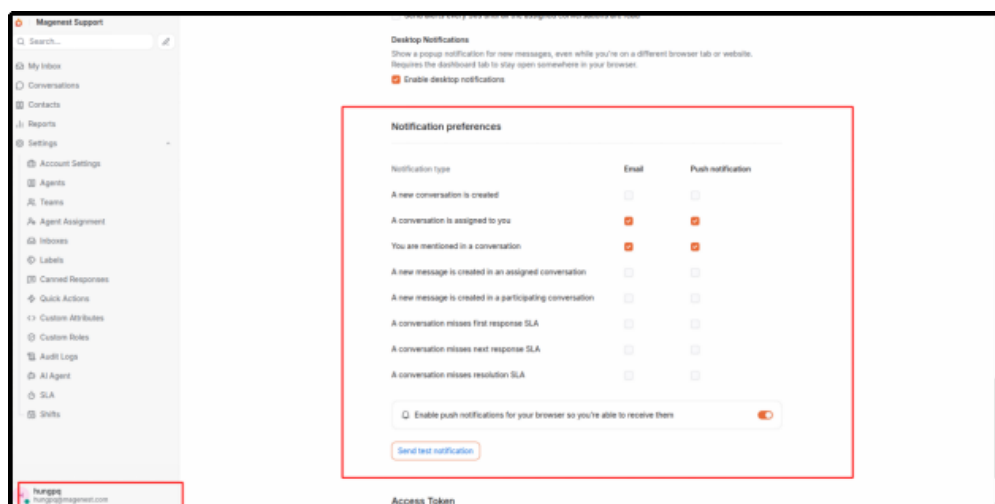
Go to Profile Settings > Notifications. The system provides five notification types:

Notification type	Default
New conversation	Off
Conversation assigned to me	On
New message in a conversation assigned to me	Off
Someone mentioned me	Off

New message in a conversation I participate in	Off
--	-----

For new Agents, only the second notification type is enabled by default. As a result, when a new customer message arrives before anyone has been assigned, nobody receives a notification; the conversation simply remains in Unassigned until someone checks it manually.

It is recommended that every Agent enable notification types 1, 3, and 4 as soon as they receive their account.



Notification preferences in Profile Settings

Note the last two columns. Push now sends real browser or desktop notifications; see Section 12.5. Email does not yet send actual notification emails. Enabling it currently only affects the in-app bell and notification list.

12.4 Audio Notifications - The Most Practical In-App Alert

Go to Profile Settings > Audio Notifications to enable sound alerts, choose a sound, and select when it should play—for all messages or only messages in conversations assigned to you.

Audio alerts work while Chathot is open. If you often step away from the screen, also enable Push Notifications in Section 12.5 so you can still be alerted after closing the tab.

12.5 Push Notifications to the Browser or Desktop

Unlike the notification bell and audio alerts, Push Notifications appear as operating-system notifications even when the Chathot tab is closed, as long as the browser is still running in the background and permission has been granted.

To enable Push Notifications:

1. Go to Profile Settings > Notifications.
2. For each notification type you want to receive, select the Push column. The first time you do this, your browser asks for permission to show notifications; click Allow.
3. Click Send test notification. If the notification appears, setup is complete. If the system says "Enable push notifications before sending a test," the current device has not yet been registered.

Important notes:

Each browser or device is registered separately. Enabling Push on one device does not enable it on another; each device must be configured individually.

If Chathot is already open on that device, the system does not send a duplicate push notification because the browser is already displaying in-app activity. Push Notifications begin once there are no Chathot tabs open on that device.

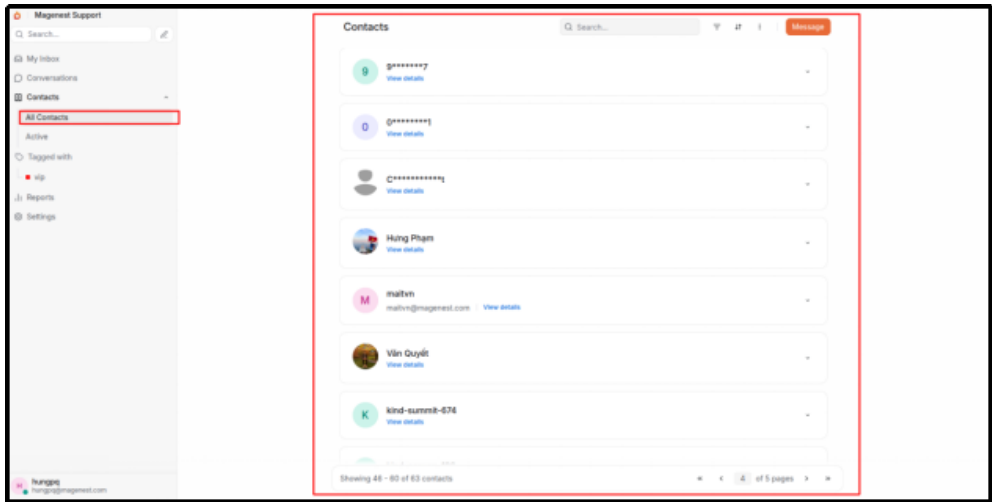
Notifications include the sender's avatar when available. Clicking a notification opens the relevant conversation directly.

Which events generate Push Notifications depends on the options you selected in Section 12.3—for example, when a conversation is assigned to you, when there is a new message in one of your conversations, or when someone mentions you.

If selecting Push does not trigger a browser permission request, or the test notification fails, ask an Administrator to check whether the push notification key has been configured. The site must run over HTTPS.

13. Contacts

Open Contacts from the sidebar.



Contacts list

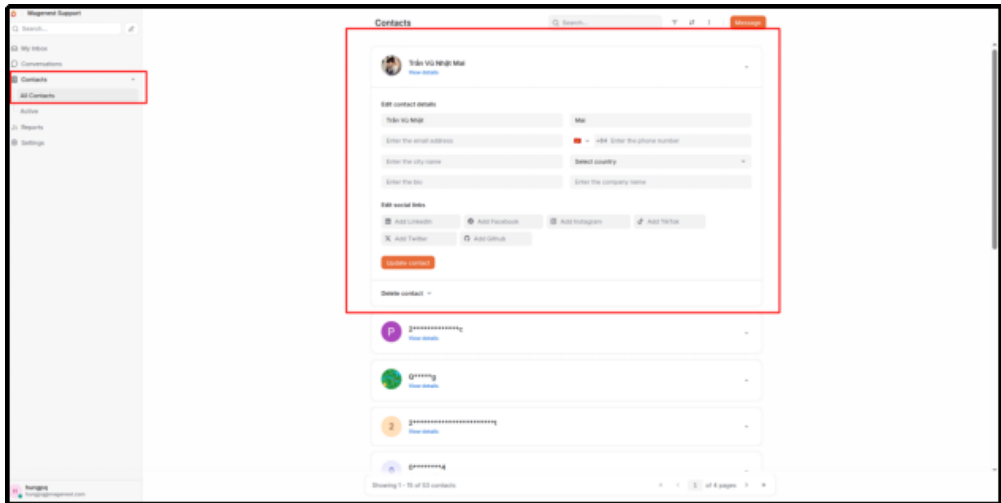
13.1 Basic Actions

You can browse the customer list by page, search by name, email, or phone number, open a Contact to view its details, Custom Attributes, and full conversation history, create a Contact manually, and edit existing information.

A Contact profile also shows which Inboxes can be used to message that customer, and lets you start a new conversation from one of those Inboxes.

13.2 Labels, Notes, and Other Actions

Feature	How to use it
Apply a Label to a Contact	From the Contact profile. Unlike a conversation Label, this Label is attached to the customer rather than a specific interaction.
Filter by Label	In the sidebar, open Contacts and select Tagged with.
Customer Notes	Use Notes in the right-hand Conversation panel. See Section 11.
Active list	In the sidebar, open Contacts > Active to show customers with activity in the last 24 hours.
Sort	By name, email, phone number, creation date, or most recent activity.
Delete Contact	Deletes the customer and all related conversations and messages. This cannot be undone.



13.3 Merge Duplicate Contacts

If the same person messages you through Facebook and the website, the system creates two separate Contacts. To combine them:

1. Open the Contact you want to keep. This will be the primary Contact.
2. Select Merge.
3. Choose the Contact you want to merge into the primary Contact.

Result: all conversations, messages, Labels, and Notes are moved to the primary Contact. Profile data is merged, and if both Contacts contain the same field, the value from the primary Contact is retained. The secondary Contact is then deleted.

This action cannot be undone, so review the Contacts carefully before confirming.

13.4 Features Not Currently Available

Importing Contacts from CSV, exporting Contacts to CSV, and calling a Contact are not currently available. The calling feature is only available in the commercial edition of the upstream system.

Part C - For Administrators

14. Initial Setup Roadmap

If you are starting with an empty system, the following setup order is recommended.

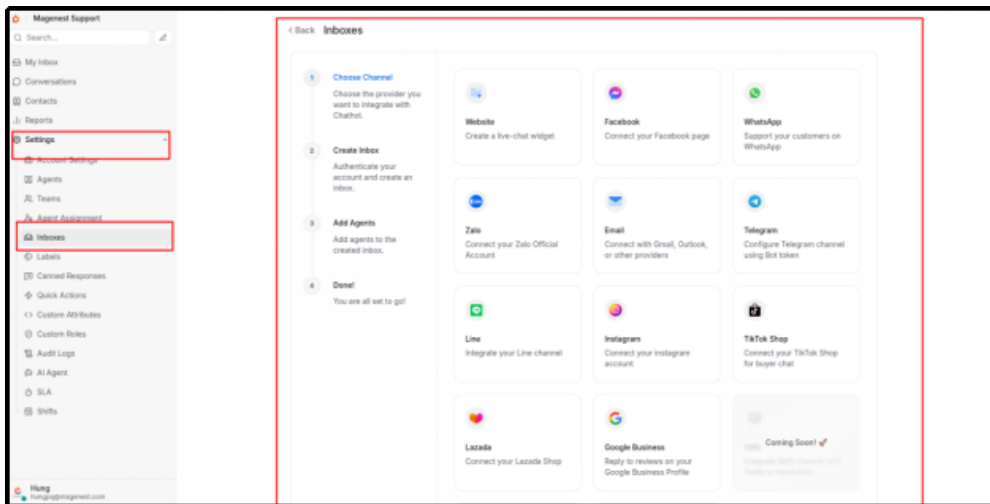
Step	Task	Location
1	Change the company name and set the default language	Settings > Account Settings
2	Create the shared Label set	Settings > Labels
3	Create Custom Attributes if needed, for example order number	Settings > Custom Attributes
4	Invite Agents and confirm they receive the invitation email	Settings > Agents
5	Create Teams by department	Settings > Teams
6	Connect the first channel; Website is recommended because it is the simplest	Settings > Inboxes > Add Inbox
7	Add Collaborators to the Inbox	Inbox > Collaborators tab
8	Configure Business Hours	Inbox > Business Hours tab
9	Enable and configure Auto Assignment	Inbox > Settings tab and Settings > Agent Assignment
10	Create an initial Canned Response set	Settings > Canned Responses
11	Enable CSAT if you want to measure support quality	Inbox > CSAT tab
12	Configure the AI Customer Assistant	Settings > AI Agent, then the Inbox > AI Agent tab
13	Ask Agents to enable notifications and audio alerts	Profile Settings > Notifications

Step 7 is commonly missed. If you skip it, Agents can log in and see an empty screen, which may make the system appear broken.

15. Connecting Channels

Go to Settings > Inboxes > Add Inbox.

The Add Inbox screen displays multiple channel tiles. Chathot currently supports 13 channels: Website, Facebook, Instagram, Zalo, Email, TikTok, TikTok Shop, Lazada, Shopee, Telegram, LINE, WhatsApp, and Google Business Profile. Other tiles such as SMS, API, Voice, and Twilio are disabled because they are not supported. Facebook, Instagram, TikTok, TikTok Shop, Lazada, Shopee, and Google can only be selected after the server Administrator has configured the relevant platform app; this is a one-time setup for the company. If a tile is still disabled, contact the server Administrator. Telegram and LINE require no server-side app setup; you only need to enter credentials from those platforms. WhatsApp requires a Meta App with a webhook configured once by the server Administrator. See Section 15.12.



Channel selection screen when adding a new Inbox. Disabled tiles indicate unsupported or unconfigured channels.

The TikTok tile can only be selected after an Administrator has configured a TikTok Developer App, which requires prior TikTok approval and cannot be created instantly. Contact the Administrator if the tile remains disabled. This channel currently supports two-way text messaging and receiving images from customers, but cannot send images, which is the same outbound limitation as Zalo and Instagram.

15.1 Website - Embedded Website Chat

The Website channel requires no platform-side preparation, so it is the recommended first channel to set up.

Setup steps:

1. Select Add Inbox > Website.
2. Enter the following information:

Website Name: the Inbox name shown in Chathot, for example "Website Chat"

Website Domain: your company website address

Widget Color: the primary color of the chat widget

Welcome Heading: the heading customers see, for example "Hello"

Welcome Tagline: supporting text, for example "We usually reply within a few minutes"

3. Create the Inbox, then select the Collaborators who will handle this channel.
4. The final step displays the embed code.

Website Inbox setup form

Embed on your website: copy the code and paste it into your website source immediately before the closing </body> tag. You can retrieve the embed code at any time from the Inbox Configuration tab.

Test after embedding: open the website in an incognito/private window. The chat widget should appear in the lower-right corner. Send a test message; the conversation should appear in Chathot within a few seconds.

Two additional settings are recommended:

In the Configuration tab, enter a comma-separated list of domains where the widget is allowed to load. This prevents other websites from embedding your chat widget. Leaving the list empty allows the widget to load anywhere.

Use the Pre Chat Form tab if you want to collect the customer's name and email before the chat starts.

15.2 Facebook Messenger

Prerequisite: the server Administrator must configure a Facebook App and point its webhook to Chathot. This is a one-time setup for the company. If it has not been completed, the Facebook tile can still be selected but the connection will fail.

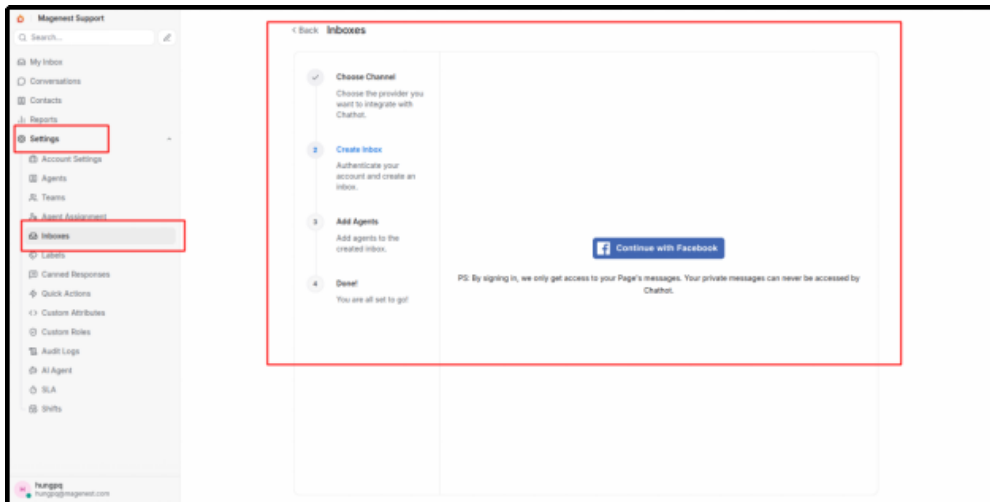
Setup steps:

1. Select Add Inbox > Facebook.
2. Sign in with a Facebook account that has administrative access to the Fanpage.
3. Select the Fanpage you want to connect.
4. Name the Inbox and select its Collaborators.

Test: use a different Facebook account to message the Fanpage. The conversation should appear in Chathot.

Ongoing maintenance: the connection may expire after several months. If inbound messages stop or outgoing messages show Failed, open the Inbox; the system will display a reconnect option.

Facebook policy: after 24 hours from the customer's last message, Facebook blocks further free-form replies.



Facebook Messenger connection screen

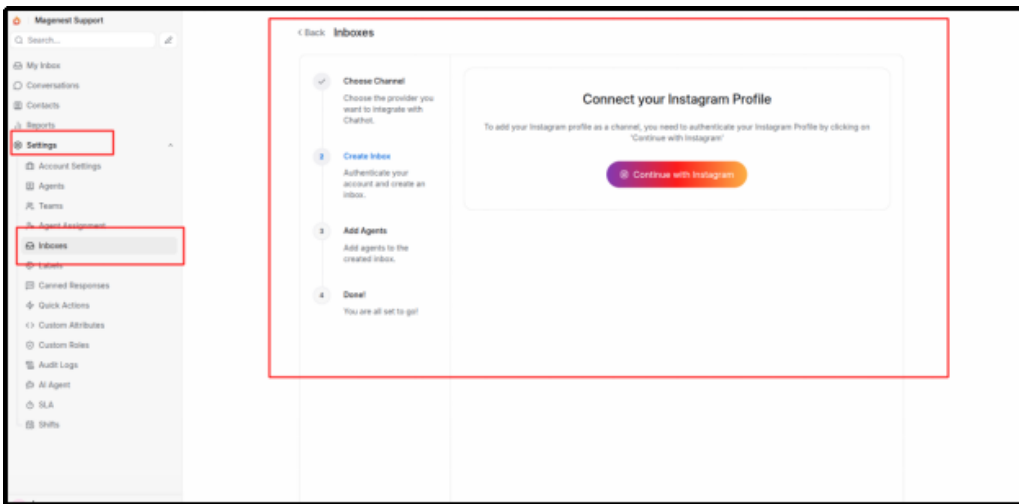
15.3 Instagram

Account requirement: the Instagram account must be a Business or Creator account, and third-party messaging access must be enabled under Instagram Settings > Privacy > Messages.

Setup steps:

1. Select Add Inbox > Instagram, then click Continue with Instagram.
2. Sign in to the Instagram account and grant the requested permissions.
3. Name the Inbox and select its Collaborators.

If the Instagram tile is disabled, the system has not yet been configured with an Instagram App. Contact the server Administrator.



Instagram connection screen

Important: you can receive images and files sent by customers, but outbound messages currently support text only.

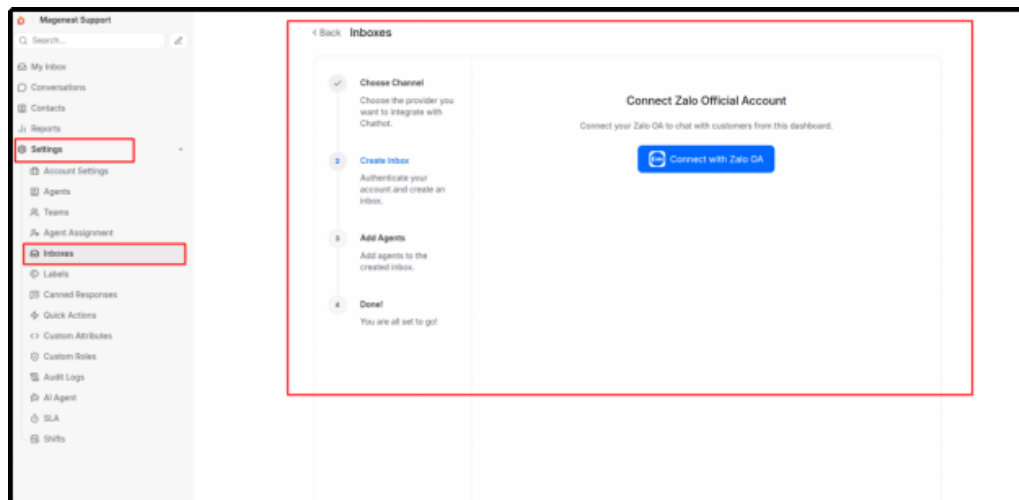
15.4 Zalo Official Account

Setup steps:

1. Select Add Inbox > Zalo. The system redirects you to Zalo's authorization page.
2. Select the Official Account you want to connect and grant access.
3. Return to Chathot; the Inbox has now been created.
4. Open the new Inbox Settings, go to the Configuration tab, paste the OA Webhook Secret, and click Save.

Step 4 is mandatory and is frequently missed. Until the Webhook Secret is added, the system rejects all incoming Zalo messages. This is the most common cause of the issue "Zalo is connected, but no messages are coming in."

You can find the Webhook Secret in the Zalo OA administration portal under Webhook. Each OA has its own secret; secrets cannot be shared between OAs.



Zalo Official Account connection screen

Important: you can receive images and files sent by customers, but outbound messages currently support text only.

15.5 Email

Email setup has two separate steps, which is a common source of confusion.

Step 1 - Create the Inbox:

1. Select Add Inbox > Email, then choose Other Providers.
2. Enter the Inbox name and email address, for example support@company.com.

3. Create the Inbox.

At this point the Inbox exists, but it cannot yet receive or send email. Many users stop here and then wonder why no messages appear.

Step 2 - Configure the mail servers. Open Settings for the Inbox you just created.

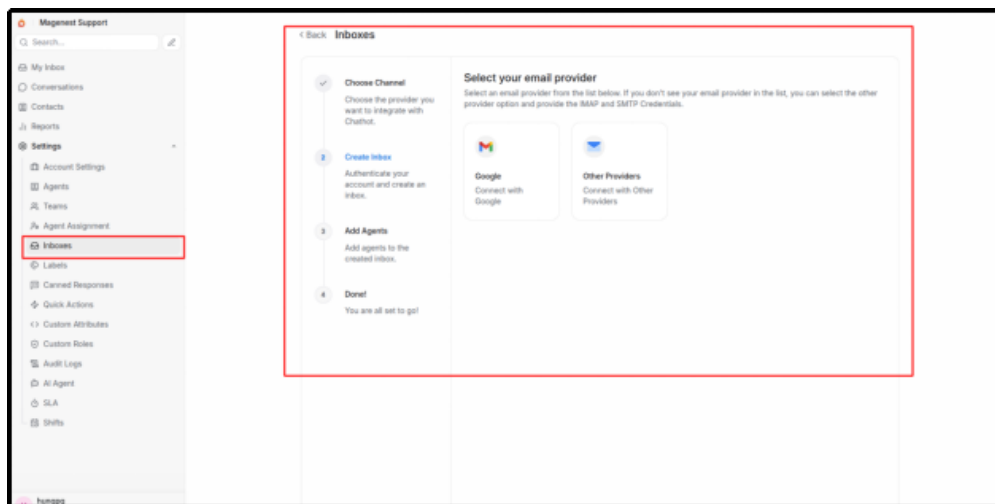
Use the IMAP Settings tab to receive email:

Field	Gmail example
IMAP Address	imap.gmail.com
Port	993
Login	support@company.com
Password	App Password, not your normal account password
Enable SSL	On
IMAP switch	On

Use the SMTP Settings tab to send email:

Field	Gmail example
SMTP Address	smtp.gmail.com
Port	587
Login and Password	Same as above
STARTTLS	On
SMTP switch	On

Gmail and Google Workspace require an App Password. Google will reject the account's normal sign-in password.



IMAP Settings tab for an Email Inbox

How the Email channel works: Chathot checks the mailbox once per minute, so new mail can take up to one minute to appear. A new email creates a new conversation. Replies are matched back to the correct existing conversation using email metadata, even when the messages are several days apart. When an Agent replies in Chathot, the customer receives a real email.

Four important points:

Each message an Agent sends becomes a separate email. If the Agent sends three short messages, the customer receives three emails.

Quoted content from previous emails is displayed directly in the message body and cannot be collapsed.

Disabling IMAP automatically disables SMTP as well.

The Email channel does not support the AI Customer Assistant.

15.6 New Channels - Summary

The seven channels below were added after version 1.2. Conversation handling—Agent assignment, Labels, Resolved status, SLA, CSAT surveys, Business Hours, and automated greetings—works the same way as on other channels. See Sections 15.7 to 15.13 for channel-specific details.

Channel	How to connect	Customer can send	You can send	AI Customer Assistant
TikTok Shop	Sign in with a seller account	Text, images, product cards, order cards	Text	Yes
Lazada	Sign in with a seller account	Text, images, emoji, video previews	Text	Yes
Shopee	Sign in with a seller account; Shopee approval required	Text, images, video previews	Text	Yes
Telegram	Paste the bot token from @BotFather	Text, images, video, voice messages, files, location	Text	Yes
LINE	Enter Channel ID, Secret, and Token	Text, stickers, images, video, audio, files	Text, images, video	Yes
WhatsApp	Enter credentials from Meta (Cloud API)	Text, images, video, audio, documents	Text	Yes
Google Business Profile	Sign in with the Google account that manages the profile	Reviews with star ratings	Text (public review reply)	No

15.7 TikTok Shop

This channel handles chat between buyers and a TikTok Shop store and is linked to order activity. It is different from the TikTok channel introduced earlier in Section 15, which handles direct messages for a TikTok for Business account. The two channels use separate apps and connection methods.

Setup steps:

1. Select Add Inbox > TikTok Shop and click Connect with TikTok Shop. The system redirects you to the TikTok Shop authorization page.
2. Sign in with the seller account and grant access.
3. Return to Chathot. The Inbox is created; give it a name and select its Collaborators.

Channel-specific behavior:

Buyer messages display the buyer's actual name and avatar. If the buyer starts a conversation from a product or order, the conversation shows a product card or order card directly in the message thread.

The right-hand panel includes a TikTok Shop Orders section listing that buyer's orders, including order ID with copy button, status (Unpaid, Ready to Ship, In Transit, Delivered, Completed, Cancelled, and so on), item count, total value, and tracking number. This lets Agents check order information without opening Seller Center.

When the AI assistant is enabled for this Inbox, it can answer questions such as "Where is my order?" using live order data and can include the relevant order card in its response.

If inbound messages stop or outgoing messages show Failed, open the Inbox. When authorization has expired, the system displays a reconnect option.

15.8 Lazada

This channel handles chat between buyers and a Lazada store in Vietnam.

Setup steps:

1. Select Add Inbox > Lazada and click Connect with Lazada.
2. Sign in with the Lazada seller account and grant access.
3. Return to Chathot. The Inbox is created; give it a name and select its Collaborators.

Important notes:

If a seller account covers multiple countries, only the first country is connected. Each Inbox can be linked to only one store.

After the first connection, the system waits about 12 minutes before importing previous chat history once. This delay is intentional because Lazada needs time to synchronize on its side. New messages arrive immediately and do not wait for this initial sync.

Inbound content can include text, images, emoji, system messages, and video (preview image only). For other Lazada message types, the system shows an unsupported-message notice instead of leaving the content blank.

Outbound messages support text only. The AI Customer Assistant is supported.

15.9 Shopee

This channel integrates Shopee Seller Chat. Important: since 18/11/2024, Shopee has stopped granting Chat API access to new third-party applications. Only sellers that already have access through a Shopee Account Manager can use the integration. The channel has been implemented according to Shopee documentation but has not yet been verified with a live Shopee account, so test it thoroughly before relying on it in production.

Setup is the same as Lazada: select Add Inbox > Shopee, click Connect with Shopee, sign in with the seller account, and grant access.

Inbound messages support text, images, and video previews. Shopee product cards and FAQ messages display an unsupported-content notice. Outbound messages support text only. The AI Customer Assistant is supported.

15.10 Telegram

Telegram is one of the easiest channels to connect because it does not require app approval or third-party sign-in.

Setup steps:

1. In Telegram, start a chat with @BotFather, create a new bot, and copy the Bot Token.
2. In Chathot, select Add Inbox > Telegram, paste the Bot Token, and click Create Telegram Channel.
3. Chathot validates the token, retrieves the bot name, and registers the webhook automatically. No additional configuration is required in Telegram.
4. Select Collaborators. Customers can then find the bot by name and send messages.

Important notes:

Only 1-to-1 private chats are accepted. Messages posted in Telegram groups are ignored.

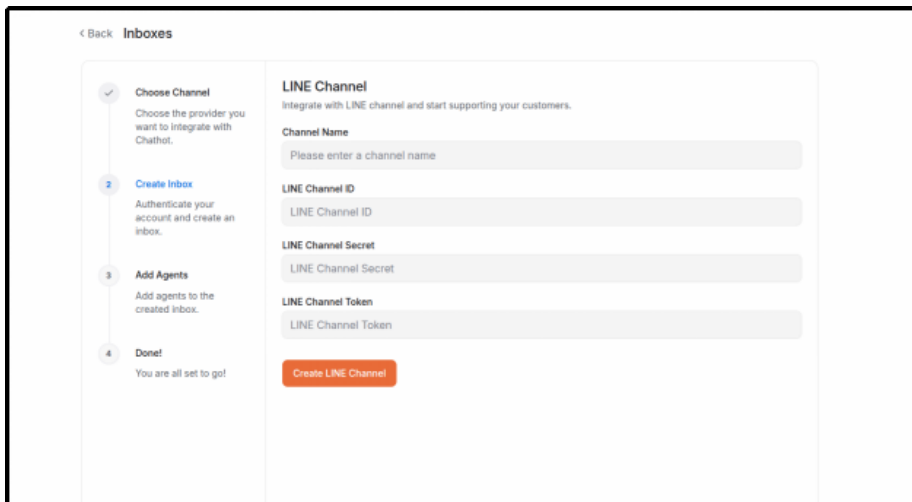
A Telegram bot can be linked to only one Inbox across the entire system because Telegram allows each bot to use only one webhook URL. To reuse the bot elsewhere, remove the existing Inbox first.

Telegram bot tokens do not expire. If many outgoing messages suddenly show Failed, the token has usually been revoked or regenerated in @BotFather. Paste the new token into the Inbox configuration.

Outbound text supports bold, italic, strikethrough, code, and links. If a customer edits a previously sent Telegram message, the message is updated in Chathot as well.

CSAT survey links are sent as plain text rather than buttons.

15.11 LINE

The screenshot shows the 'Inboxes' configuration page in Chathot. On the left, a vertical progress bar indicates four steps: 1. Choose Channel (completed), 2. Create Inbox (current step), 3. Add Agents, and 4. Done!. The main area is titled 'LINE Channel' with the instruction 'Integrate with LINE channel and start supporting your customers.' Below this, there are four input fields: 'Channel Name' (with a placeholder 'Please enter a channel name'), 'LINE Channel ID', 'LINE Channel Secret', and 'LINE Channel Token'. At the bottom right of this section is an orange button labeled 'Create LINE Channel'.

Prerequisite: a LINE Official Account with Messaging API enabled. From the LINE Developers Console, obtain the Channel ID, Channel Secret, and a long-lived Channel Access Token.

Setup steps:

1. Select Add Inbox > LINE, enter the channel name and the three credentials above, then click Create LINE Channel.
2. Select Collaborators. The completion screen displays a Callback URL. Copy it into the Webhook URL field in LINE Developers Console and enable Use webhook. This step is mandatory; no messages will arrive until it is completed. You can retrieve the Callback URL later from the Inbox Configuration tab.
3. Send a test message from your LINE account to confirm the connection.

Important notes:

LINE requires webhook URLs to use HTTPS with a certificate issued by a trusted authority. Self-signed certificates are rejected.

Chathot verifies the signature on every incoming LINE message and rejects messages with an invalid signature.

Outgoing messages always use LINE Push rather than Reply. This means they can be sent at any time, but they count toward the monthly message quota of your LINE Official Account plan.

Customers can send text, stickers, images, video, audio, and files. Agents can send text, images, and video. Group messages are received only if the sender has also added the OA in a 1-to-1 relationship. Other message types, such as location, display an unsupported-content notice.

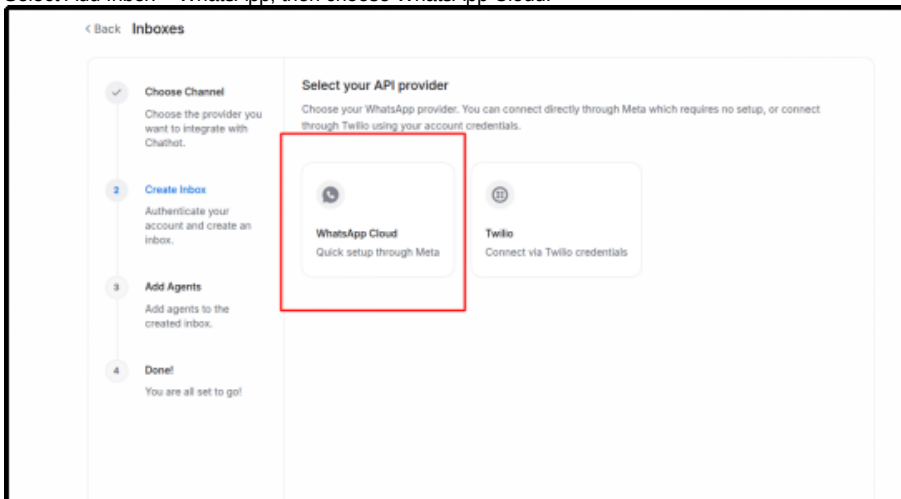
15.12 WhatsApp

WhatsApp connects through Meta's WhatsApp Cloud API and is configured manually. The other options shown on the setup screen—Twilio, 360dialog, and Meta embedded sign-up—are not currently working.

Prerequisite (one-time server setup for the company): a Meta App with the WhatsApp product enabled. In the App webhook settings, configure a Callback URL in the form <https://your-chatbot-domain/webhooks/whatsapp>, use the Verify Token defined in the server configuration, and subscribe to the messages field. For each phone number, you then need the WhatsApp Business phone number, Phone Number ID, Business Account ID (WABA), and an access token from Meta for Developers.

Setup steps:

1. Select Add Inbox > WhatsApp, then choose WhatsApp Cloud.



2. Enter the Inbox name, phone number beginning with + and containing no spaces (for example +84901234567), Phone Number ID, Business Account ID, and the API key field, which is the access token. Click Create WhatsApp Channel.

A screenshot of the 'Inboxes' setup screen, specifically the 'Create Inbox' step. The left sidebar is identical to the previous screenshot. The main area is titled 'Create Inbox' and contains several input fields: 'Inbox Name' (with placeholder text 'Please enter an inbox name'), 'Phone number' (with placeholder text 'Please enter the phone number from which message will be sent.'), 'Phone number ID' (with placeholder text 'Please enter the Phone number ID obtained from Facebook developer dashboard.'), 'Business Account ID' (with placeholder text 'Please enter the Business Account ID obtained from Facebook developer dashboard.'), and 'API key' (with placeholder text 'API key'). At the bottom of the form is an orange button labeled 'Create WhatsApp Channel'.

3. Chathot validates the token with Meta and automatically subscribes the WhatsApp Business account to incoming messages. If any credential is invalid, the system displays an error immediately and does not create the Inbox.
4. Select Collaborators, then send a test message to the WhatsApp number from another phone. If no message arrives, ask the server Administrator to review the Meta App webhook configured in the prerequisite step.

Important notes:

Temporary access tokens expire after approximately 24 hours. The token provided by Meta's free "Try it out" flow is intended for testing only. Once it expires, outgoing messages show Failed. To fix this, create a long-lived System User token in Meta Business Settings and paste it into the API key field in the Inbox Configuration tab. For production use, start with a long-lived token.

Each phone number can be connected to only one Inbox.

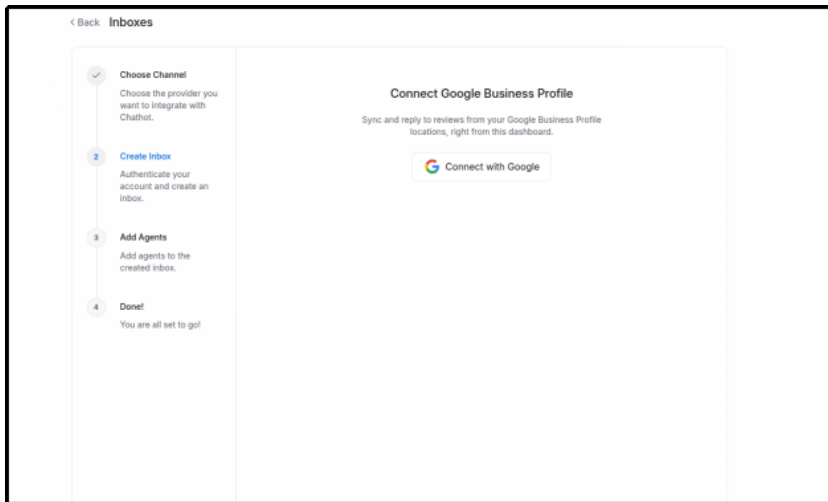
WhatsApp allows free-form replies only within 24 hours of the customer's last message. After 24 hours, Meta requires an approved template message. Chathot does not currently support WhatsApp templates, so outbound messages will show Failed.

Sent, Delivered, and Read statuses are updated based on delivery reports from Meta.

Enable Lock to single conversation if you want all messages from the same phone number to remain in one conversation.

15.13 Google Business Profile (Google Reviews)

This channel brings customer reviews from Google into Chathot so your team can reply from within the application. It is not a chat channel.



Setup steps:

1. Select Add Inbox > Google Business and click Connect with Google.
2. Sign in with the Google account that manages the Business Profile and grant access.
3. Chathot synchronizes the locations associated with the Business Profile, then takes you to the Collaborator selection step.

How this channel works:

The system checks for new reviews approximately every 2 minutes rather than in real time.

Each review becomes a separate conversation. The customer name comes from their Google display name; anonymous reviewers appear as Google User. The message content is the review text. A star-only review with no written comment appears as "[5 - no written review]." The star rating and location are stored on the Contact profile. Because Google does not expose a stable customer identity, two reviews from the same person become two separate, unrelated conversations and Contacts.

If the customer edits the review on Google, the content in Chathot is updated as well.

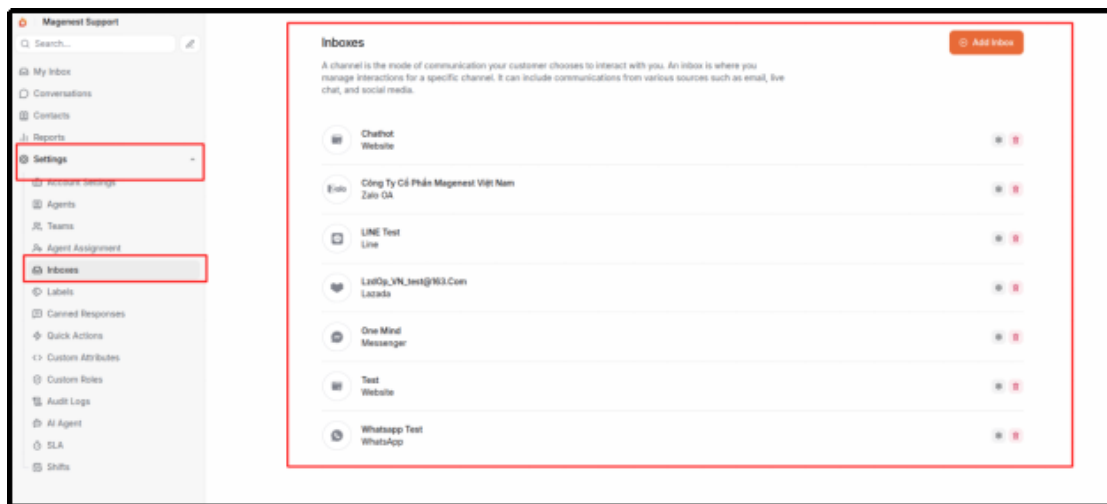
The message you compose and send becomes a public reply beneath the Google review. Each review supports only one public reply: sending another reply overwrites the previous one on Google, although Chathot keeps both messages in the conversation thread. Write carefully because the customer and the public can see the reply.

If the review was already answered directly on Google, that existing reply is synchronized into Chathot and appears as an outgoing message.

This channel does not support the AI Customer Assistant, automatic greetings, or after-hours auto-replies because a public review is not a private conversation. Auto Assignment, Labels, and Notifications continue to work normally.

16. Inbox Configuration

Go to Settings > Inboxes, select an Inbox, and click Settings. The tabs shown depend on the channel type.

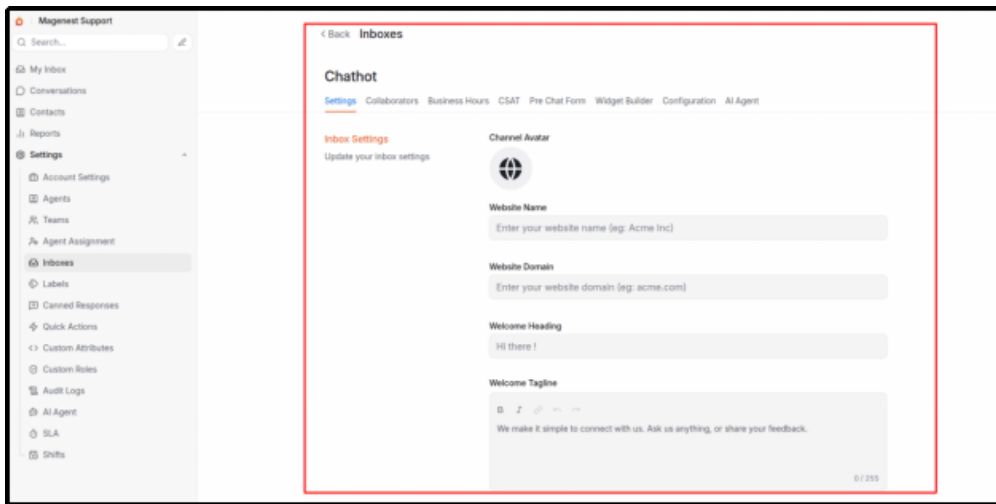


List of connected Inboxes

Tab	Available for
Settings	All channels
Collaborators	All channels
Business Hours	All channels
CSAT	All channels
Pre Chat Form	Website
Widget Builder	Website
Configuration	Website, Zalo, Email, LINE, WhatsApp
AI Agent	Website, Facebook, Instagram, Zalo, TikTok, TikTok Shop, Lazada, Shopee, Telegram, LINE, WhatsApp

16.1 Settings Tab

Field	Purpose
Inbox Name	Name displayed in Chathot
Avatar	Inbox avatar
Enable auto assignment	Enables Auto Assignment for this Inbox. This must be turned on if you want the system to distribute work automatically.
Enable greeting message	Sends an automatic greeting when the customer sends the first message. Works on all channels.
Enable email collect box	Asks for the customer's email inside the chat widget when the Contact does not already have one. Website only; asked once per conversation.
Allow messages after resolved	Allows the customer to continue messaging after the conversation is marked Resolved. This affects only the Website chat widget UI.
Lock to single conversation	Keeps all messages from the same customer in one conversation instead of creating a new one after each Resolve. Off by default; see Section 9.2.
Enable CSAT	Enables the customer satisfaction survey.
Sender name	Display name used when sending messages to customers. Currently has no effect.

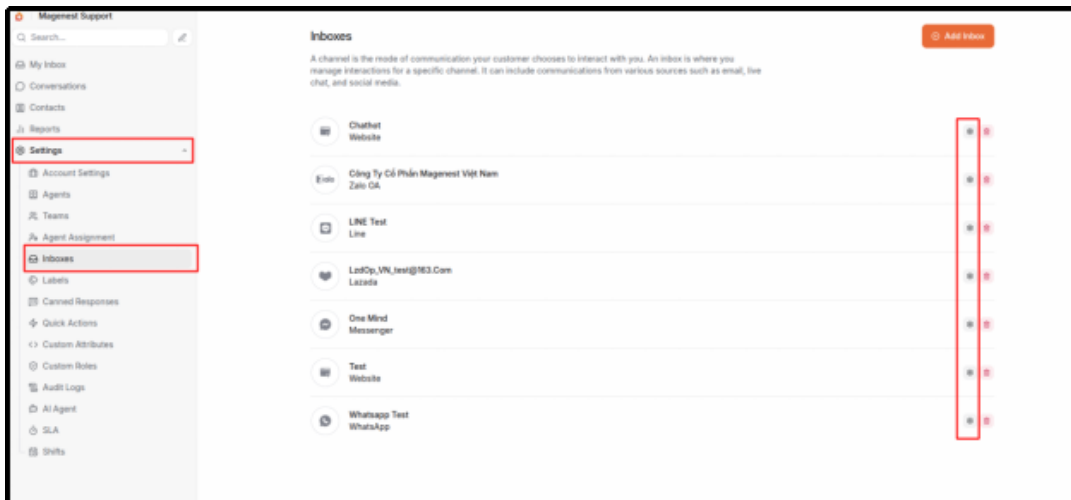


Settings tab for an Inbox

16.2 Collaborators Tab

Select the Agents who are allowed to handle this Inbox.

This is the most important Inbox setting operationally. An Agent who is not listed as a Collaborator cannot see any conversation from that channel, cannot be mentioned in a Private Note, and cannot receive Auto Assignment. Whenever you add a new channel, remember to update its Collaborator list.



Collaborators tab: select the Agents who can handle this Inbox

16.3 Business Hours Tab

Configure each day of the week as closed all day, open all day, or open during a specific time range. Also select the timezone and write the message shown outside business hours.

Business Hours affect three separate behaviors that should be understood clearly.

First, customer-facing availability. This applies only to the Website chat widget. Outside business hours, the widget displays an away state together with the message configured here.

Second, Auto Assignment. Outside Business Hours, Chathot does not automatically assign conversations on any channel. Conversations still arrive normally and remain in Unassigned until business hours resume or someone takes them manually. This applies to both Assignment Rules and Assignment Policies.

Third, after-hours auto-replies on other channels. Customers who message outside Business Hours through Facebook, Instagram, Zalo, Email, and the newer channels—except Google Business Profile—receive the after-hours message configured in this tab. Each conversation receives it only once within 24 hours, so a customer who sends five messages at midnight does not receive five identical replies. Website chat does not receive this message because the availability notice is already displayed in the widget.

Enabling Business Hours changes work distribution, not just what customers see. If the schedule or timezone is configured incorrectly, no one may receive automatic assignments for an entire day and the system will not warn you. After setup, send a test message during working hours to confirm. Conversations received outside Business Hours are not lost; they remain in Unassigned and are distributed when the Inbox opens again. See Section 18.5.

The AI Customer Assistant runs 24/7 and is not blocked by Business Hours. If you want customers to receive a real answer outside working hours rather than only an away message, enable the AI Customer Assistant. See Section 19.

Business Hours tab: configure opening hours for each day of the week

16.4 Pre Chat Form Tab - Website Only

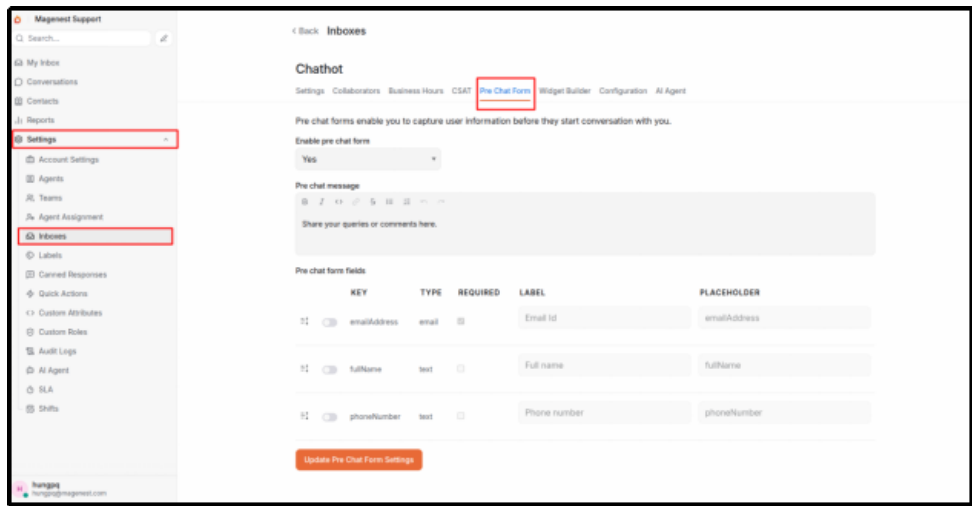
Enable a form that collects customer information before the chat begins.

- 1. Select Enabled in the first field.
- 2. Enter an introductory message, for example “Please provide a few details so we can assist you more effectively.”
- 3. Configure each field in the table below.

Column	Meaning
Row checkbox	Show or hide this field.
Key	Technical field name; cannot be changed for default fields.
Type	Data type
Required	Whether the customer must complete the field
Label	Text shown to the customer. Editable; for example, change “Full name” to a localized label.
Placeholder	Faint helper text shown inside the input field

The three default fields are Email Id, Full name, and Phone number. All three are disabled initially and must be enabled manually. You can also add Custom Attributes created under Settings > Custom Attributes.

There are two ways to collect a customer’s email on the Website channel: the Pre Chat Form, which asks before the conversation begins, and the email collection box, which asks inside the widget after the first message. Using either one is usually enough. Consider the trade-off carefully: requiring too many fields can reduce the number of customers willing to start a chat.

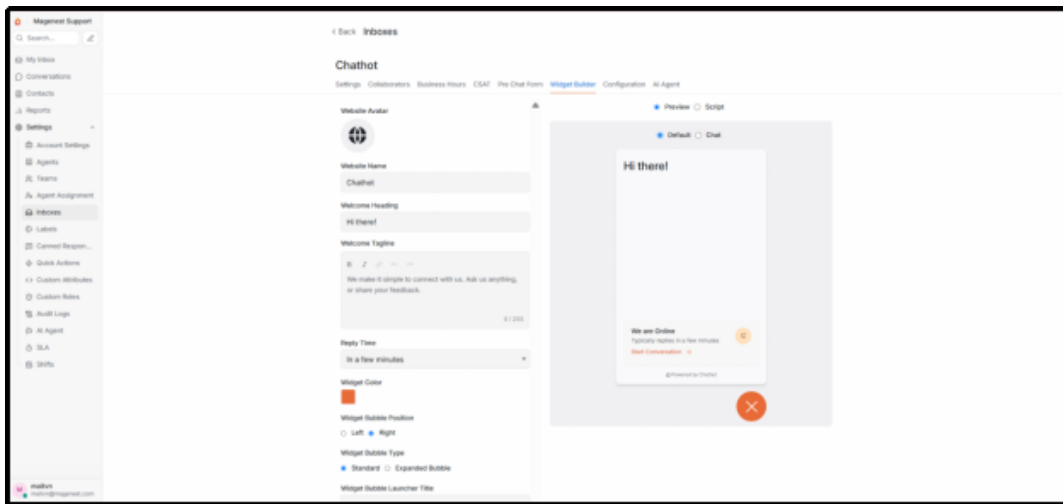


Pre Chat Form tab

16.5 Widget Builder Tab - Website Only

Enable or disable features in the website chat widget, including customer file attachments, the emoji picker, the option for customers to end a conversation, and using the Inbox avatar as the bot avatar.

You can also customize the widget color and position and preview the result directly on the configuration screen.



Widget Builder tab with live preview

16.6 Configuration Tab

For Website Inboxes, this tab includes the embed code, widget color, heading and greeting text, estimated response time shown to customers (within a few minutes, within a few hours, or within a day), and the list of domains allowed to embed the widget.

Website Inboxes also include User Identity Verification (HMAC): a secret key your company website uses to sign the identity of logged-in customers and prevent impersonation. You can enable Require identity verification and use Rotate key to generate a new key. Rotating the key revokes the old key immediately; there is no overlap period and the change cannot be undone. Your website backend must start signing with the new key immediately or logged-in customers will be rejected. Only Administrators—not users with a Custom Role—can rotate the key.

For Zalo, this tab contains the mandatory Webhook Secret field. See Section 15.4.

For LINE, this tab shows the Callback URL that must be added in LINE Developers Console. See Section 15.11.

For WhatsApp, this tab contains the API key. When the access token expires, paste the new token here. See Section 15.12.

For Email, this tab contains the IMAP and SMTP configuration. See Section 15.5.

Website Configuration tab showing the embed code

17. Agents, Teams, Labels, Attributes, and Permissions

17.1 Agents - Settings > Agents

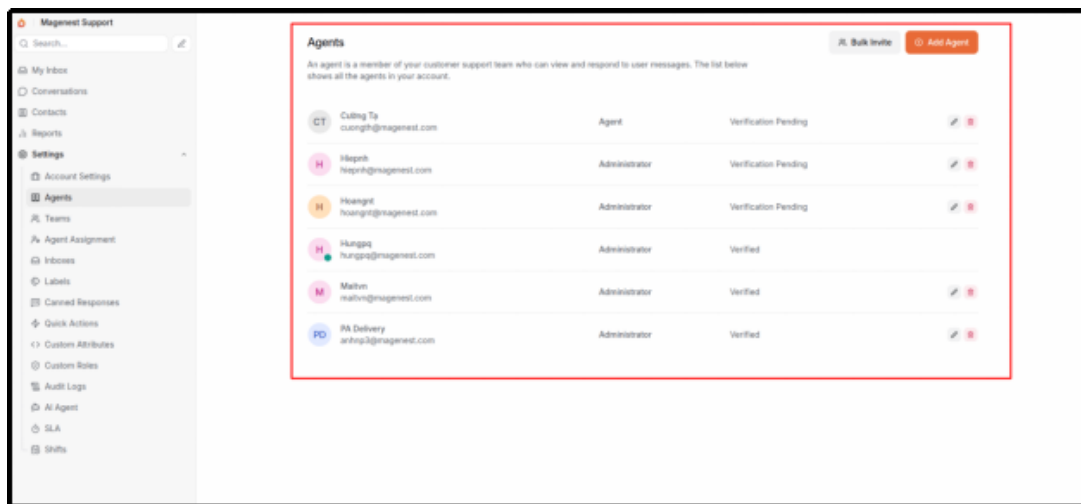
Add a new Agent:

1. Click Add Agent.
2. Enter the name and email address, then choose the Agent or Administrator role.
3. The system sends an invitation email.
4. The new user follows the link in the email, sets a password, and can then sign in.

If outgoing email has not been configured, the account is still created but no invitation is sent and the new user cannot sign in. Test this by inviting one of your own email addresses before inviting the full team. Temporary workaround: ask the user to select Forgot password? on the login screen so they can set a password themselves.

After creating an Agent, remember to add them to the Collaborators list for each relevant Inbox. Otherwise, they will sign in and see an empty workspace.

To invite multiple users at once, click Bulk Invite at the top of the page. Paste the email list into the field, one address per line or separated by commas, then send the invitations. Each address is invited with the Agent role by default. Existing or invalid email addresses are skipped automatically without causing the entire batch to fail.



Agent management page

17.2 Teams - Settings > Teams

Create Teams based on departments, for example Technical Support, Accounting, or VIP Customer Care. Each Team has a name, description, member list, and an Auto Assignment option.

The Team Auto Assignment option determines what happens when a conversation is routed to the Team. When enabled, Chathot continues by selecting a specific Agent within the Team. When disabled, the conversation is assigned only to the Team and waits for a member to claim it manually.



Team management page

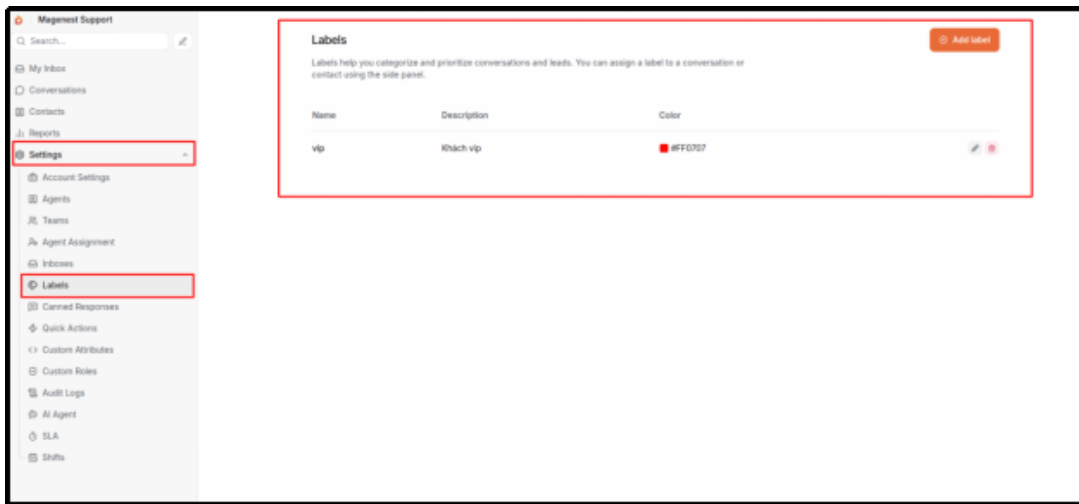
17.3 Labels - Settings > Labels

Create Labels with a name, description, color, and an option to show them in the sidebar.

Label names are automatically converted to lowercase and must be unique. For example, VIP and vip are treated as the same Label.

Only Administrators can create, edit, or delete Labels. Agents can apply existing Labels to conversations as normal.

Suggested starter Labels: complaint, technical, quotation, escalated-to-technical, spam, vip.



Label management page

17.4 Custom Attributes - Settings > Custom Attributes

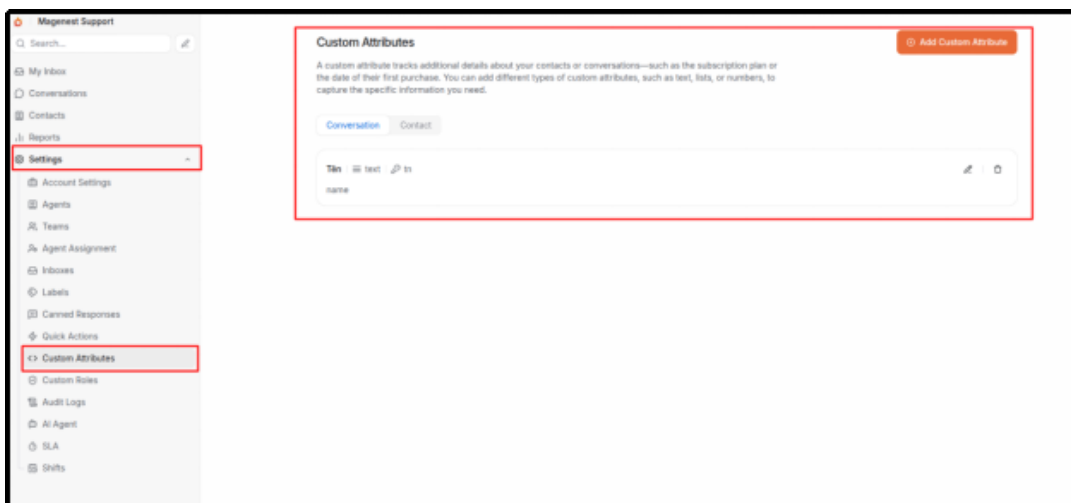
Create company-specific data fields that apply either to Conversations or Contacts.

Supported data types include text, number, currency, percentage, URL, date, select list, and checkbox.

Common examples:

Applies to	Field name	Type
Conversation	Order number	Text
Conversation	Purchase channel	Select list
Contact	Service package	Select list
Contact	Contract expiry date	Date

Once created, Custom Attributes appear in the right-hand Conversation panel and in Contact profiles. They can also be added to the Website Pre Chat Form and used as conditions in advanced filters.



Custom Attributes page

17.5 Canned Responses - Settings > Canned Responses

See Section 7. Unlike most Settings pages, all Agents can create and edit Canned Responses; this is not restricted to Administrators.

17.6 Custom Roles - Settings > Custom Roles

Create a Custom Role to grant selected additional permissions to an Agent, then assign that role when editing the Agent profile.

At present, only one permission can be delegated: Manage inboxes, which allows an Agent to create, edit, and delete Inboxes without being promoted to Administrator.

User-management permissions are intentionally not delegable because a user with that permission could promote themselves to Administrator.

17.7 Who Can See What

Area	Agent	Agent with Manage inboxes permission	Administrator
Conversations in Inboxes where the user is a Collaborator	Yes	Yes	Yes
Conversations from all Inboxes	No	No	Yes
Contacts	Yes	Yes	Yes
Settings > Canned Responses	Yes	Yes	Yes
Settings > Inboxes	No	Yes	Yes
Settings > Agents, Teams, Labels, Custom Attributes	No	No	Yes
Settings > AI Agent	No	No	Yes
Reports, including CSAT	No	No	Yes
Settings > SLA	View only	View only	Yes

17.8 Agent Conversation Scope

The table above explains that an Agent can only see conversations from Inboxes where they are a Collaborator. Within that boundary, a second visibility setting applies company-wide under Settings > Account Settings > "What conversations can Agents see?"

Option	What the Agent can see
Only my conversations	Only conversations assigned directly to that Agent
My Team conversations	Conversations routed to the Agent's Team, plus conversations assigned directly to the Agent
All conversations in my Inboxes	All conversations from Inboxes where the Agent is a Collaborator, including conversations assigned to colleagues

All three options remain within the Collaborator boundary. Even the broadest setting does not expose an Inbox the Agent does not belong to. Administrators can always see all conversations.

Existing companies are set to the broadest scope when this update is applied so conversations do not suddenly disappear from Agents' views. Newly created companies default to "Only conversations assigned to me." You can change the setting at any time and the change takes effect immediately.

Account settings

General settings

Account name
Magnum Support

Icon

Used as the browser tab icon, the sidebar mark, and the chat widget's icon. SVG, PNG, JPG, WEBP or ICO, up to 5MB. Takes effect on next page reload.

Brand name
Chatbot
Shown in the browser tab title and on the chat widget. Leave blank to use this instance's default name ("Chatbot").

Site language
English

What agents can see
Only their own conversations
An agent sees a conversation once it is assigned to them. Admins always see everything.

Show raw IP address in Audit Logs
Off by default. Settings > Audit Logs shows a partially masked IP (e.g. 203.0.113.x) to anyone with access. Turn this on only if agents reviewing the log genuinely need the exact address.

Embed code on login page

```
<script>
(function() {
  var _hmt = _hmt || [];
  (function() {
    var gtag = (window.dataLayer = window.dataLayer || []).push;
    gtag('config', 'UA-123456789-1');
  })();
  gtag('event', 'login');
})();
</script>
```

Settings > Account Settings: What conversations can Agents see?

17.9 SLA Policies - Settings > SLA

An SLA Policy defines time targets for a conversation and sends alerts when a target is breached. Each policy can track up to three milestones; only the milestones you configure are measured:

Milestone	What it measures
First Response	Time from the customer's message until the first Agent reply
Next Response	Time from each later customer message until the next Agent reply
Resolution Time	Time from when the conversation opens until it moves to Resolved

Two additional options are important. Count only during business hours pauses the SLA timer outside Business Hours, so “resolve within 4 hours” means 4 working hours rather than 4 clock hours; Inboxes without Business Hours configured continue to use real elapsed time. Alert recipients defines who is notified when an SLA is breached, in addition to the Assignee and conversation Participants.

After creating an SLA Policy, assign it to conversations from Conversation Actions in the right-hand panel. Once applied, the conversation shows a countdown timer at the top, which turns red when the SLA is overdue.

Two things to know before you start: new companies do not have a default SLA Policy, so you must create one; and when an SLA is breached, the system only sends notifications—it does not automatically reassign the conversation or raise its Priority.

Settings > SLA: list of configured SLA Policies

17.10 Two Pages That Are Not Currently Available

Settings > Agent Bots opens, but the page is currently empty.

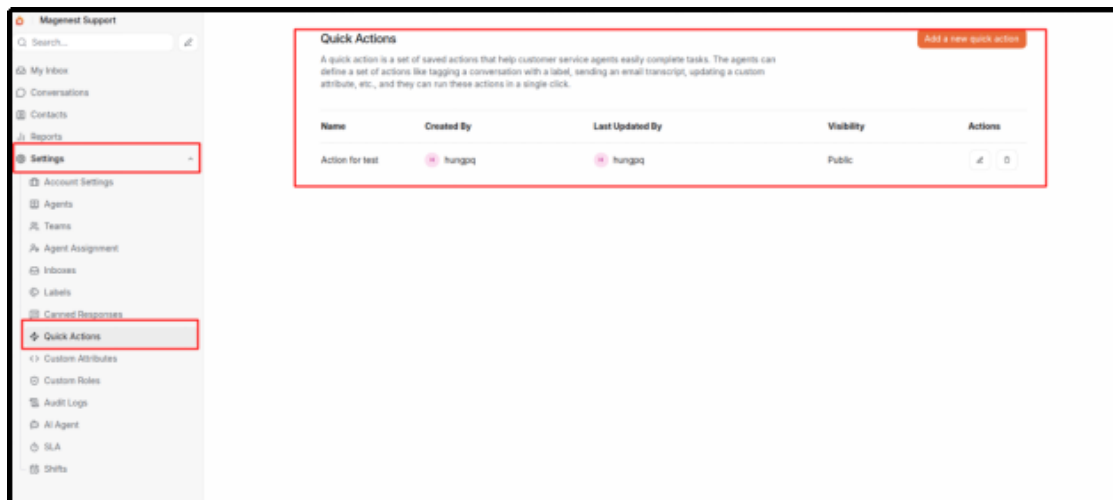
Settings > Security is intended for Single Sign-On (SSO/SAML), which is not currently available. Multi-Factor Authentication (MFA) is also not available.

17.11 Quick Actions - Settings > Quick Actions

This is where you create the Quick Actions used in Section 7.4. Like Canned Responses in Section 17.5, Quick Actions can be created and edited by all Agents, not only Administrators.

Each Quick Action includes a name, description, visibility setting (public or visible only to its creator), and an ordered list of actions. Each action has its own input fields depending on the type—for example, selecting an Agent or Team to assign, choosing a Label, or entering the message or Private Note to send.

See the note in Section 7.4 about three action types that can be configured but are not currently executed: sending attachments, calling webhooks, and emailing conversation transcripts. They can still be added to a Quick Action, but they have no effect when the action runs.



Settings > Quick Actions page

17.12 Audit Logs - Settings > Audit Logs

This page is available only to Administrators and records administrative changes across the account, including creating, editing, or deleting Agents, Teams, Labels, Inboxes, Quick Actions, AI prompts, Knowledge Base documents, Gemini API Keys, AI budgets, and more. Each entry shows the user who performed the action, their role, the action, timestamp, and details of what changed.

You can filter Audit Logs by object type (Agent, Team, Inbox, and so on) and by date range.

Deleting a message (Section 6.8) is also recorded, including the original content before deletion. IP addresses are masked by default, for example 203.0.113.x; Administrators can enable full IP display under Section 22.1 if genuinely required. The system does not record login or logout events and never stores the actual values of sensitive fields such as API Keys—it only records which field changed. Audit Logs are separate from the status History of an individual conversation described in Section 11.

#	Avatar	Name	Role	Activity	Time	Details
1		hungng	Administrator	Created Team Member	Sep 30, 2026 09:23 AM	Team: #1 User: hungng
2		hungng	Administrator	Created Team Member	Sep 30, 2026 09:23 AM	Team: #1 User: hungng
3		hungng	Administrator	Created Team	Sep 30, 2026 09:23 AM	Name: AI
4		maithn	Administrator	Created SLA Policy	Sep 30, 2026 09:22 AM	Name: Magement default response time Escalation Recipients: 5 Resolution Threshold: 3600 Next Response Threshold: 600 Show more
5		hungng	Administrator	Created Quick Action	Sep 30, 2026 09:17 AM	Name: Action for test
6		maithn	Administrator	Created Label	Sep 25, 2026 04:26 PM	URL: vip
7		maithn	Administrator	Created Assignment Policy	Sep 25, 2026 04:26 PM	Name: Test Policy Enabled: Yes Assignment Order: round_robin Conversation Priority: earliest_created Show more
8		hungng	Administrator	Deleted Inbox Member	Sep 25, 2026 10:16 AM	User: hungng Inbox: #8

Settings > Audit Logs page

17.13 Shifts - Settings > Shifts

Shifts answer the question, “Is this Agent currently on shift?” Unlike Business Hours in Section 16.3, which define when an Inbox is open, Shifts are configured per Agent. Only Administrators can create or edit them.

Each Shift includes a name, the days of the week it applies to, start and end times in 15-minute increments (overnight shifts such as 22:00 to 06:00 are supported), a Shift timezone (Vietnam time by default, but configurable for teams serving other regions), and the list of Agents assigned to that Shift. An Agent can belong to multiple Shifts, and each Shift can include multiple Agents.

How Shifts affect Auto Assignment:

Shifts are optional. If your company has no active Shift, Auto Assignment works exactly as before.

Once at least one Shift is active, Auto Assignment only considers Agents who are currently on shift. Agents who have not been added to any Shift are also excluded from Auto Assignment, although they can still claim work manually.

This applies to every Auto Assignment path described in Section 18, including the recurring queue reassignment scan.

If a conversation arrives when no Agent is on shift, it remains in Unassigned and is assigned when the next Shift starts. The reassignment scan runs once per minute.

Shifts do not change conversation visibility, Online status, or AI behavior. Agents must still be Online and meet the other conditions in Section 18.1.

Common mistake: creating a Shift for only a few Agents and forgetting to add everyone else. Those omitted users will never receive Auto Assignment. After enabling your first Shift, review the member list carefully.

18. Auto Assignment

Auto Assignment routes new conversations directly to a specific Agent instead of leaving them in Unassigned until someone notices them.

18.1 Five Required Conditions

If any of the five conditions below is not met, the conversation remains in Unassigned and the system does not display a warning:

1. Enable auto assignment is turned on in the Inbox Settings tab.
2. The Agent is a Collaborator on that Inbox.

3. The Agent's status is Online.
4. The current time falls within the Inbox Business Hours.
5. The Agent has not reached the Workload Limit. See Section 18.2.

Condition 3 is the most common reason users think Auto Assignment is “not working.” Condition 4 means that outside Business Hours, Chathot intentionally does not assign conversations. All five conditions are temporary: once the missing condition becomes valid again, the system automatically redistributes the waiting queue. See Section 18.5.

If your company uses Shifts (Section 17.13), there is one additional condition: the Agent must currently be on shift.

18.2 Two Assignment Mechanisms That Are Easy to Confuse

Chathot has two different assignment mechanisms, configured in two different places.

Mechanism A - Assignment Policy, under Settings > Agent Assignment.

This is the default way an Inbox distributes work and applies to conversations that do not match a more specific rule.

Distribution method	How it works
Round robin	Assigns work in rotation; the eligible Agent who has waited longest since their last assignment receives the next conversation.
Balanced	Prioritizes the eligible Agent with the fewest currently Open conversations.

Fair distribution limit lets you cap the rate at which an Agent receives new work—for example, “no more than N conversations within X minutes”—to prevent one person from being overloaded during traffic spikes.

Workload Limit sits beside this setting but controls something different. Fair distribution limit controls assignment speed, for example no more than 5 conversations in 30 minutes. Workload Limit controls how many Open conversations an Agent can hold at the same time. For example, an Agent already handling 5 Open conversations will not receive more work even if they have not been assigned anything for several hours.

The default Workload Limit is 5 conversations per Agent. Set it to 0 to remove the limit. The count is company-wide rather than per Inbox because an Agent who is overloaded in one Inbox is still overloaded when another Inbox needs help.

When no Agent meets the conditions, the conversation waits in Unassigned instead of being forced onto someone who is already at capacity. As soon as an Agent resolves enough work to fall below the limit, the queue can continue to be distributed.

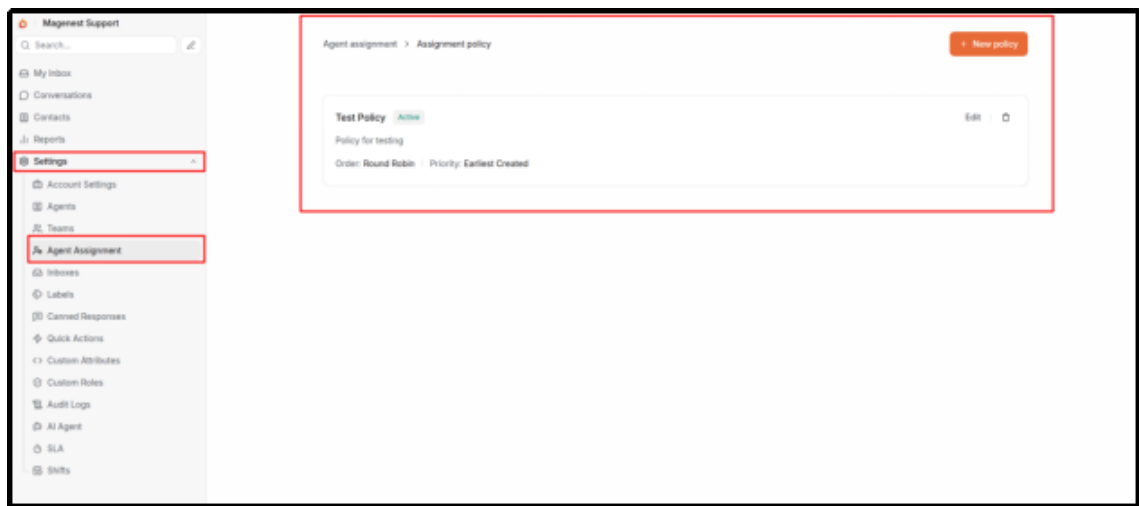
Conversation Priority Order determines which waiting conversation is assigned first: Oldest first uses the conversation creation time, while Longest waiting first uses the time of the most recent activity.

The screenshot shows the 'Edit assignment policy' form in the Management Support interface. The form is titled 'Assignment policy > Edit assignment policy' and contains several sections:

- Policy name:** Test Policy
- Description:** Policy for testing
- Status:** Policy is active
- Assignment order:** Round robin (selected) and Balanced
- Assignment priority:** Earliest created (selected) and Longest waiting
- Fair distribution policy:** Set the maximum number of conversations that can be assigned per agent within a time window to avoid overloading any one agent. This required field defaults to 100 conversations per hour. Assign max 100, Conversations per agent in every 60 Hours
- Workload cap:** Skip auto-assigning to an agent who is already holding this many open conversations. The conversation waits in the queue instead. Set to 0 for no cap.

Assignment Policy form: Workload Limit and Conversation Priority Order

After creating an Assignment Policy, assign it to each Inbox that should use it.



Auto Assignment Policy page

Mechanism B - Assignment Rules, under Settings > AI Agent > Assignment Rules.

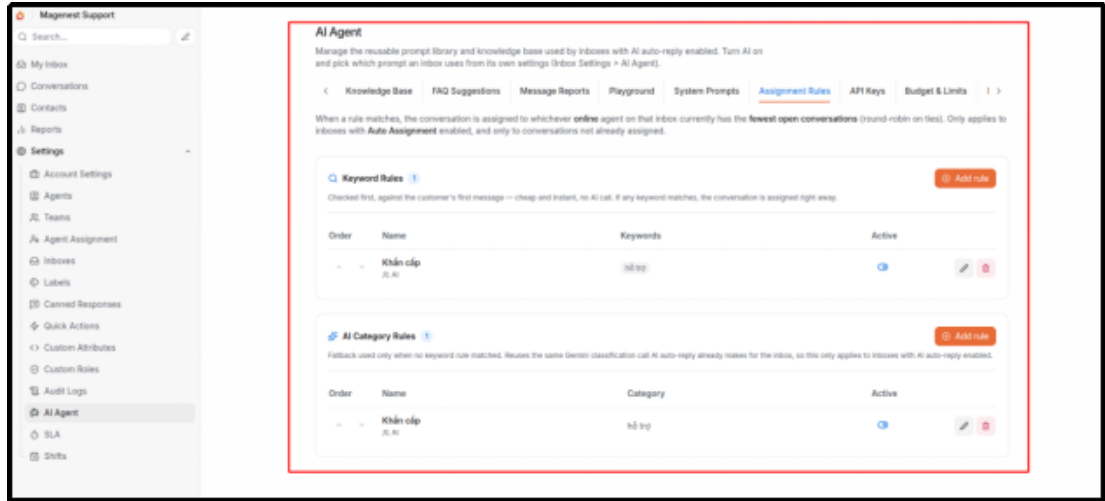
Assignment Rules route conversations based on the content of the customer's first message.

Rule type	How it works
Keyword	Define keywords such as refund, complaint, legal action, or lawyer. Matching any one keyword triggers the rule. Matching is case-insensitive and works even when the keyword appears in the middle of a sentence.
Topic (AI Category)	Define topic names such as “complaint,” “technical,” or “quotation.” The AI identifies the topic and routes the conversation accordingly. This works only for Inboxes with AI enabled and does not consume an additional AI call.

A rule can route directly to a Team rather than choosing any Agent from the Inbox. For example, a “quotation” rule can route to Sales and a “technical issue” rule to Technical Support. Once a conversation is routed to a Team, Chathot only considers Agents in that Team who are also Collaborators on the Inbox and currently Online.

If the destination Team has Auto Assignment disabled, the conversation is assigned only to the Team and waits for a Team member to claim it manually.

Rules can be reordered by drag-and-drop, and each rule has its own enable/disable switch.



Assignment Rules tab in the AI Agent center

When a keyword-based rule matches, three things happen at the same time:

1. The conversation is routed to the Team or assigned to an Online Agent.
2. The AI Customer Assistant does not reply to that message. This is intentional so the bot does not intervene in sensitive cases.
3. The customer receives a bilingual Vietnamese-English message confirming that the request has been transferred to a support Agent and asking them to wait briefly.

The system also adds a Private Note to the conversation explaining which rule matched, which keyword triggered it, which Team received the case, and which Agent was assigned. This gives the receiving Agent immediate context.

18.3 Priority When Both Assignment Mechanisms Are Enabled

Priority	Mechanism	When it is used
1	Keyword Assignment Rule	Highest priority; evaluated before everything else.
2	Assignment Policy	Used when no keyword rule matches.
3	AI Category Assignment Rule	Used only if the first two stages do not successfully assign anyone.

18.4 Recommended Configurations by Use Case

Operational need	Recommended configuration
Distribute work evenly across the Team	Use a Round robin Assignment Policy.
Let Agents with more capacity receive more work	Use a Balanced Assignment Policy.
Prevent one Agent from receiving 20 conversations during a traffic spike	Add a Fair distribution limit, for example 5 conversations every 30 minutes.
Ensure urgent cases reach the correct owner	Use keyword Assignment Rules for sensitive topics.
Route specialist work to the right department	Use keyword or AI Category rules and route to the relevant Team.
Let AI handle easy questions and humans handle difficult ones	Enable AI and combine it with keyword rules for sensitive topics.
Prevent anyone from holding more than 5 conversations at once	Set the Workload Limit to 5.

18.5 After-Hours Queue and Reassignment Scan

Auto Assignment first runs when the customer sends a message. At that moment, assignment can fail for three temporary reasons: the message arrived outside Business Hours, no Agent is Online, or all eligible Agents have reached their Workload Limit.

To handle this, the system runs a reassignment scan every minute. If an Inbox has waiting conversations and the required conditions are now satisfied, those conversations are assigned immediately.

In practice, this means:

If a customer messages at 22:00 and the Inbox opens at 09:00, the waiting queue is distributed automatically at 09:00 the next morning without anyone assigning cases manually.

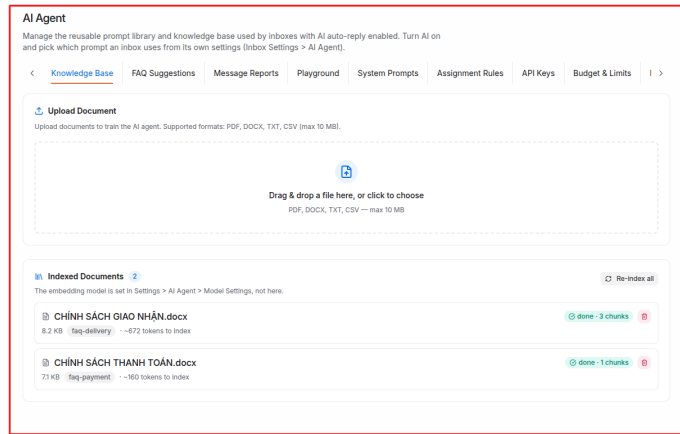
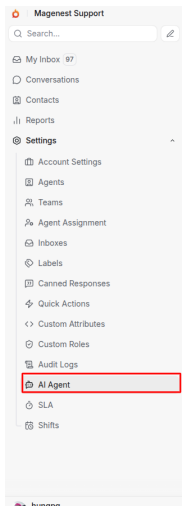
If an Agent resolves several conversations and drops below the Workload Limit, they can receive waiting work within one minute.

If the whole Team is Offline, the queue begins moving as soon as the first eligible Agent switches to Online.

Three additional points about the reassignment scan: if a conversation has already been routed to a Team, it is assigned only within that Team and never to outsiders; Teams with Auto Assignment disabled are ignored so members can claim work manually; conversations with no activity for more than 7 days are skipped so old forgotten work is not suddenly assigned. The scan also runs only for Inboxes with an Assignment Policy. If an Inbox has no policy, its queue remains unchanged.

19. AI Customer Assistant

The AI Customer Assistant reads customer messages, assesses severity, raises the conversation Priority when needed, and can reply automatically when no Agent has joined the conversation.



The AI Customer Assistant works on eleven channels: Website, Facebook, Instagram, Zalo, TikTok, TikTok Shop, Lazada, Shopee, Telegram, LINE, and WhatsApp. It is not available for Email or Google Business Profile.

19.1 Configuration Is Split Across Two Locations

This is a common source of confusion for new Administrators:

Configuration location	Purpose
Settings > AI Agent (company level)	Create AI instructions, upload documents, manage API Keys, set budgets, and create Assignment Rules.
Settings > Inboxes > select Inbox > AI Agent tab	Enable or disable AI for that Inbox and choose which prompts it should use.

The company-level AI Agent center contains eight tabs: Knowledge Base, System Prompt, Assignment Rules, API Key, Budget & Limits, FAQ Suggestions, Message Reports, and Playground.

AI Agent center with eight configuration tabs

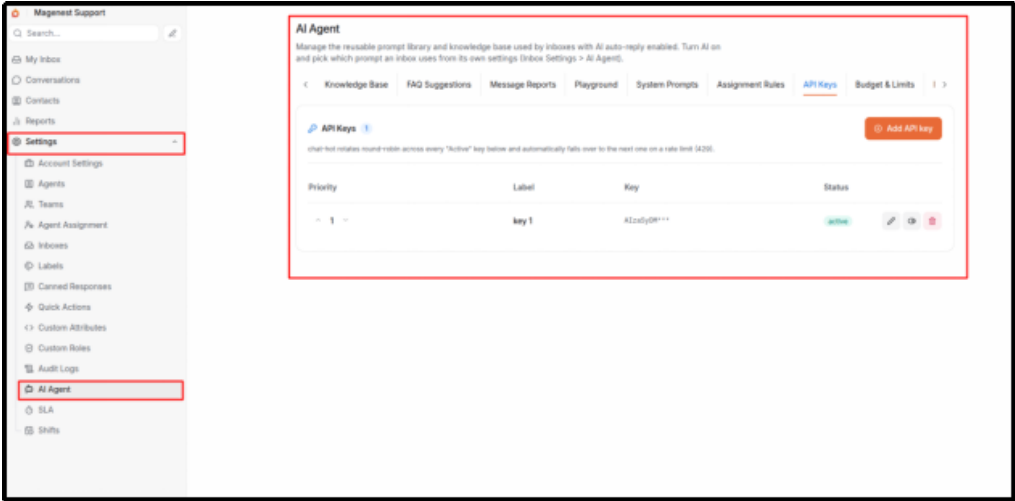
19.2 Enable the AI Customer Assistant for an Inbox

Step 1 - Add an API Key.

Go to Settings > AI Agent > API Key, click Add API key, paste the Gemini key, enter a recognizable name such as “Primary key - company account,” and click Test. If the test fails, the key is not saved.

It is recommended to add multiple keys. The system rotates between them and automatically switches to another key when one hits a rate limit. Use the up and down arrows to change the priority order.

Key status values—active, disabled, limited, and dead—are maintained manually; the system does not change them automatically. To stop using a key, set it to disabled.



API Key tab: Gemini keys, rotation priority, and Test button

Step 2 - Create AI instructions.

Go to Settings > AI Agent > System Prompt and click Add prompt.

Field	Notes
Name	For example: “Replies - customer care tone”
Type	Choose Classification or Reply
Content	Instructions for the AI
Model, Temperature, Thinking budget	Leave blank unless you have a specific reason to change them; the system uses tuned default values.

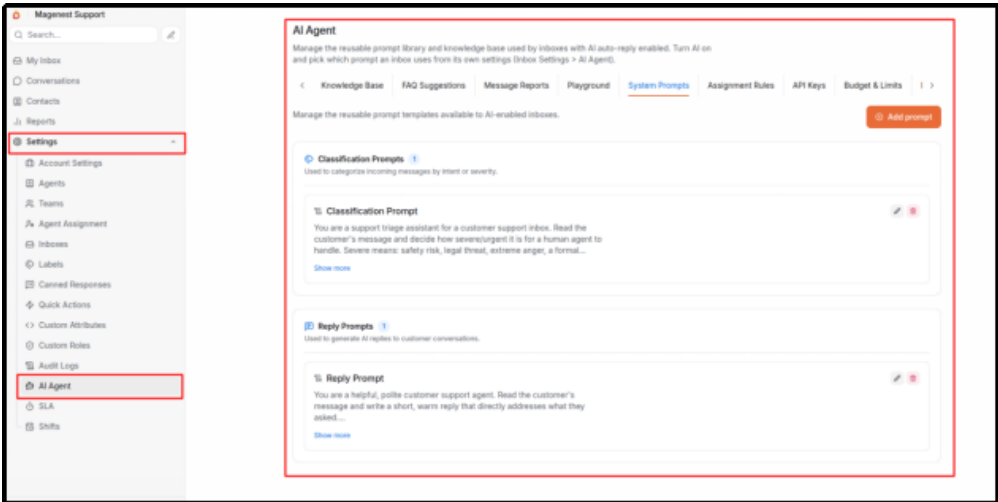
Important: unless you know exactly what you are doing, do not create a custom Classification prompt. Classification prompts must return a specific technical data format; if that format is changed incorrectly, severity classification can stop working without showing an error. Leave it blank to use the built-in default.

Reply prompts are more flexible. Use them to define the AI tone of voice, form of address, and the scope of questions it is allowed to answer.

Example Reply prompt:

You are a support agent for Company ABC. Keep replies concise, 2 to 3 sentences, and polite. In Vietnamese, refer to yourself as “em” and address the customer as “anh/ch.” Only answer questions about ABC products and services. If the customer asks for a specific price, refund policy, or raises a complaint, say that you will transfer the request to the appropriate Agent instead of answering directly. Do not invent information that is not supported by the documentation. If you are unsure, say: “Let me verify that information and get back to you as soon as possible.”

If no prompt is selected, the system uses its built-in default and continues to work normally.



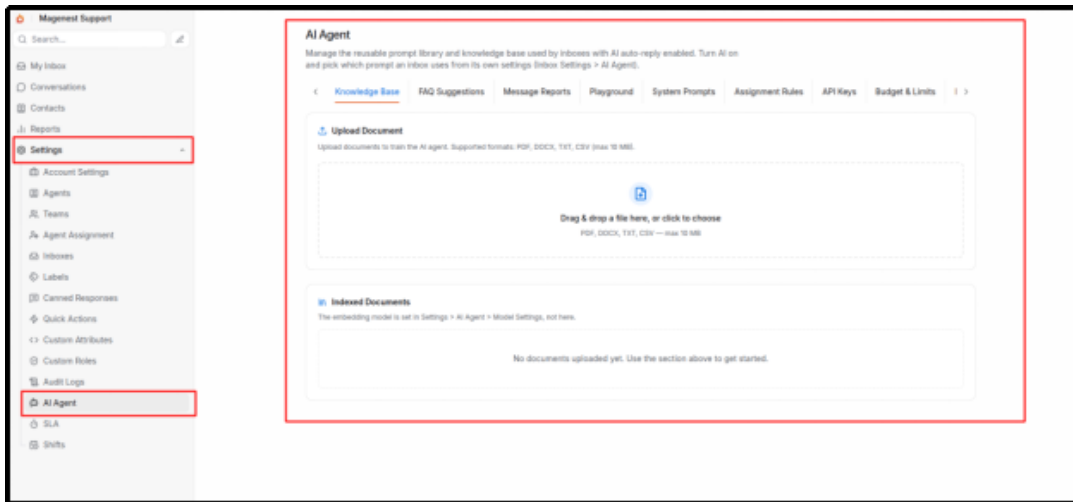
System Prompt tab: shared prompt library

Step 3 - Upload documents (optional).

Go to Settings > AI Agent > Knowledge Base and upload PDF, DOCX, TXT, or CSV files up to 10 MB each.

Assign a tag to each document. Uploading a new file with an existing tag replaces the previous file with that tag. This is useful for updating items such as price lists or policies without manually deleting the old document first.

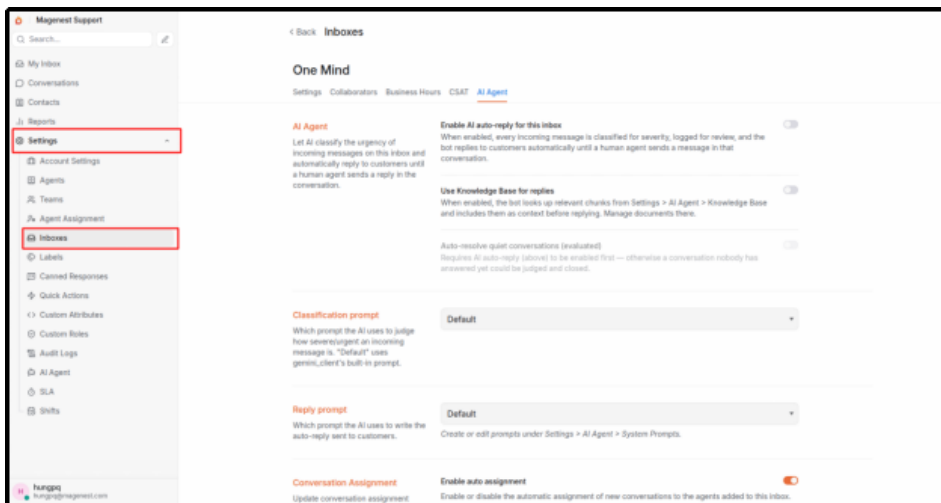
Processing moves through three statuses: pending, processing, and done. If a document remains stuck in pending, click Reprocess.



Knowledge Base tab: upload documents for AI retrieval

Step 4 - Enable AI for the Inbox.

Go to Settings > Inboxes, select the Inbox, open the AI Agent tab, and enable automatic AI replies. If you want the AI to use uploaded documents, also enable the Knowledge Base. Finally, select the Classification prompt and Reply prompt.



Inbox AI Agent tab: enable AI and select prompts

You can also set a Bot Name in this tab. The name appears on automated chat bubbles instead of the generic “Bot,” for example “Mai.” Leave it blank to keep anonymous bot replies.

You can also enable Auto-resolve quiet conversations (evaluated). This option is currently displayed in English only. When enabled, if the AI has replied and the customer remains silent for the configured period—60 minutes by default—the AI reevaluates the conversation. If it determines the issue is complete, it marks the conversation Resolved. If not, it hands the conversation over to a human instead of closing it blindly. Automatic AI replies must be enabled before this option can be turned on.

Zalo Inboxes include an additional option to automatically request customer information. When enabled, the first customer message in a new conversation triggers an information-sharing card asking whether the customer agrees to share their name, phone number, and address. The customer must actively approve the request; Zalo does not share the information automatically. You can customize the card title and description. Leave them blank to use the default Vietnamese text.

Step 5 - Test the setup.

Send a test message to the channel from another account. The AI should reply within a few seconds. If nothing happens, follow the troubleshooting checklist in Section 19.8.

19.3 How the AI Hands a Conversation Over to a Human

This is the most important behavior to understand in day-to-day operations. Every conversation is always in one of two modes, shown at the top of the conversation. See Section 9.8.

Mode	Meaning
Bot is answering	The AI Customer Assistant is allowed to reply to the customer in this conversation.
You have taken over	The AI is silent and the conversation is waiting for a human Agent.

A conversation moves to human takeover in four situations: an Agent replies to the customer, including replies sent directly from Messenger, Instagram, or Zalo OA Manager outside Chathot; an Agent clicks Take over; the conversation matches a keyword rule and is routed to a human; or the AI itself determines that it should not answer. See Section 19.4.

There are only two ways to return to “Bot is answering”: someone clicks Hand back to bot, or a Resolved conversation receives a new request from the customer. The second case is treated as a new support interaction, so the bot starts again from the beginning.

This behavior is different from earlier versions. Previously, the AI remained silent for only 2 hours and then resumed automatically. That meant a conversation left Pending while an Agent waited for the customer could suddenly receive a bot reply after 2 hours. That timer no longer exists: once a human takes over, the conversation remains in human mode until someone explicitly hands it back to the bot.

19.4 When the AI Decides to Hand Over

The AI stops and hands the conversation to a human in six situations. The specific reason appears at the top of the conversation so the receiving Agent immediately understands why the case was handed over.

Situation	Reason shown on the conversation
Customer explicitly asks to speak with a person	Handed over at the customer’s request
A high-priority keyword rule matches	Handed over because a priority keyword matched
No sufficiently relevant document is found in the Knowledge Base	Bot could not find sufficiently relevant documentation to answer
The AI determines it does not have enough evidence to answer	Bot does not have enough evidence to answer
The AI drafts an answer that is not supported by any document	Bot answer is not supported by any document
Customer repeats the same question three times or shows dissatisfaction	Customer repeated the same question

The three middle conditions apply only to Inboxes with Knowledge Base enabled because there is no source material to validate against otherwise. An Inbox that uses only a System Prompt continues to reply as before. By contrast, the “customer repeated the same question three times” condition always applies, with or without Knowledge Base, because three repeated attempts are enough to justify human support.

The practical principle is simple: the AI would rather stop than guess. As a result, an Inbox with Knowledge Base enabled but limited documentation may hand over more cases than expected. That usually indicates the Knowledge Base needs more coverage rather than a system error.

19.5 How the AI Processes Each Customer Message

The AI processes each customer message in the following sequence.

Read the flow vertically. Each checkpoint has a branch to the right that stops the AI. If any checkpoint fails, the conversation is handed to a human and the AI stays silent. Only after all three checkpoints are passed does the system generate and send a reply to the customer.

Additional points to note:

Every customer message is evaluated and logged, even when the AI does not reply. There is no separate “classify only without replying” mode; disabling the AI switch disables the entire AI workflow.

AI logs are not displayed in the customer conversation, keeping the visible chat history clean.

Simple social messages such as “hello” do not trigger Knowledge Base retrieval, which reduces unnecessary AI cost.

AI replies in the same language the customer is using. For messages classified as severe on Facebook, the reply also includes two buttons: call the hotline and open the website. The button labels follow the customer’s language, in Vietnamese or English. The phone number and URL are configured by the server Administrator.

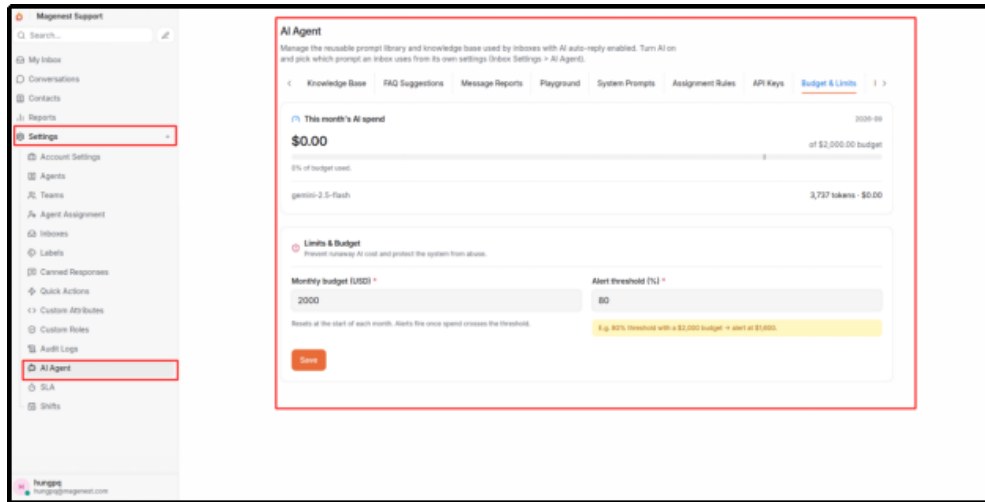
19.6 Track AI Cost

Open the Budget & Limits tab to set a monthly budget in USD and an alert threshold as a percentage. The defaults are USD 2,000 and 80%.

The page shows the current month's cost, a progress bar, and detailed token usage by model.

Important: this is a monitoring dashboard, not a hard spending cap. Exceeding the budget only displays a red warning; it does not stop AI requests automatically. To stop AI completely, disable all API Keys or turn off AI in each Inbox.

The cost dashboard is also a quick way to confirm whether AI is running. If cost does not increase, the AI has not been called.



Budget & Limits tab

19.7 After Changing the Embedding Model

If you change the Embedding Model in the Knowledge Base tab, you must click Re-index all immediately afterward.

If you do not, existing document vectors become incompatible with the new model and AI answers may become inaccurate without any warning. Re-index all processes every document again in sequence and can take some time depending on the number of files.

19.8 When the AI Does Not Reply

Check the following items in order:

1. Does the conversation show "You have taken over"? This is the most common cause. Click Hand back to bot if you want AI replies to resume.
2. Are automatic AI replies enabled for the Inbox?
3. Is the channel supported? AI does not run on Email.
4. Does the message match a keyword Assignment Rule? If so, the AI intentionally stays silent and routes the conversation to a human.
5. Is there a handover reason displayed at the top of the conversation? If so, the AI handed the case over automatically. See Section 19.4.
6. Go to Settings > AI Agent > API Key, confirm that at least one key is active, and click Test.
7. Open Budget & Limits and check whether the monthly cost is increasing. If it is not, the AI has not been called.

19.9 When the AI Gives an Incorrect Answer

1. Upload the correct documentation to the Knowledge Base, such as price lists, policies, or FAQs.
2. Enable the Knowledge Base for that Inbox.
3. Add a rule to the Reply prompt such as: "Do not invent information that is not in the documentation. If you are unsure, say that you will verify it."
4. Add keyword Assignment Rules for topics the AI should never answer directly, such as pricing, refunds, or complaints.
5. If you recently changed the Embedding Model, click Re-index all.

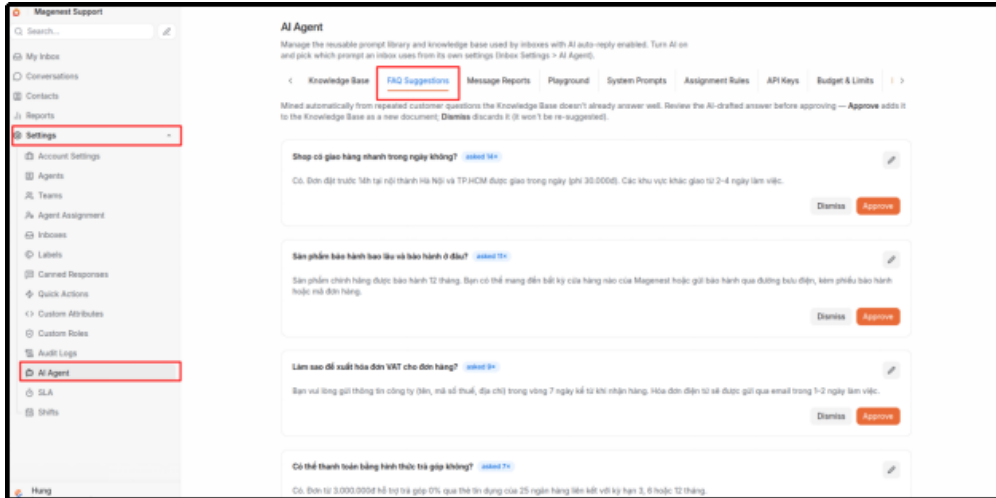
19.10 FAQ Suggestions

This tab automatically groups recurring customer questions that the AI could not answer confidently and suggests adding them as new Knowledge Base content. This means you do not have to guess which questions customers ask repeatedly.

Each suggestion shows the original question, how many times customers asked similar questions, and an AI-drafted answer. The draft is only a starting point and may not reflect actual company policy, so review and edit it before approval.

Each suggestion has three actions: Edit to revise the answer, Ignore to discard it, and Approve to add it directly to the Knowledge Base as a new document through the same processing flow used for manually uploaded files.

The system scans automatically on a schedule; there is no need to trigger a manual scan.



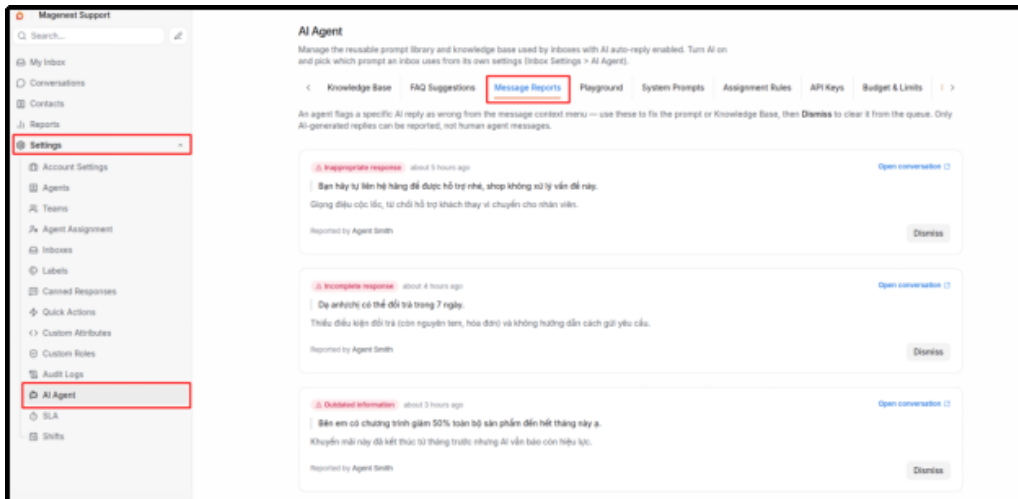
FAQ Suggestions tab with a suggestion awaiting review

19.11 Message Reports

When an Agent sees an incorrect AI reply, they can right-click that specific message—only messages generated automatically by AI, not messages typed by an Agent—select Report AI reply, choose a reason such as incorrect information, inappropriate response, incomplete answer, outdated information, or Other, and add a description.

Administrators review all reports in this tab and mark them Resolved after updating prompts, adding documentation, or confirming that no change is required.

This tab only records and tracks reports. It does not fix anything automatically; changes such as updating prompts or adding documents must still be made in the relevant configuration tabs.



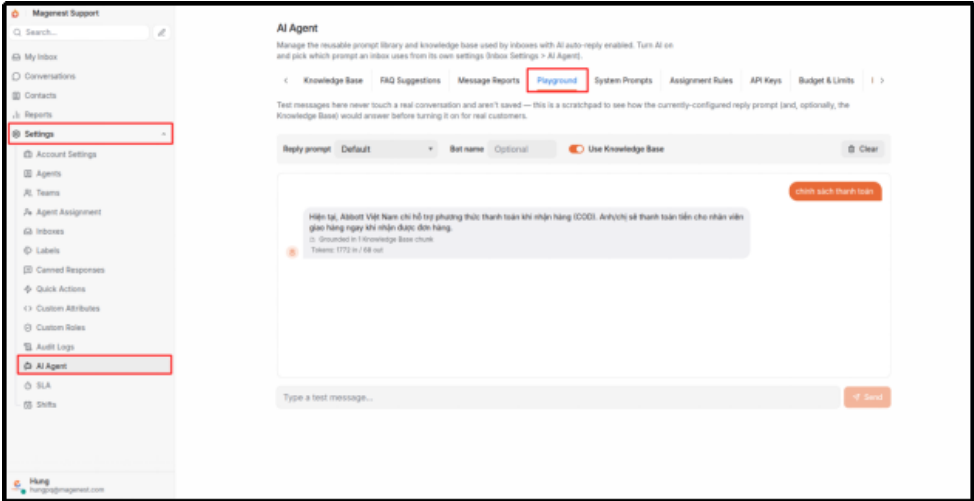
Message Reports tab with a report submitted by an Agent

19.12 Playground

Use Playground to test prompts and the Knowledge Base before exposing them to customers. Enter a sample question, choose the Reply prompt to test, toggle Knowledge Base on or off, and review how the AI responds before applying the configuration to a live Inbox.

If the AI would refuse to answer a real customer question because it cannot find relevant documentation or does not consider the evidence reliable enough, Playground shows the reason clearly. This helps you identify missing Knowledge Base content before a real customer encounters the same issue.

Testing in Playground does not affect live conversations or customer data. Nothing is sent to customers, and the test itself is not added to the Knowledge Base.



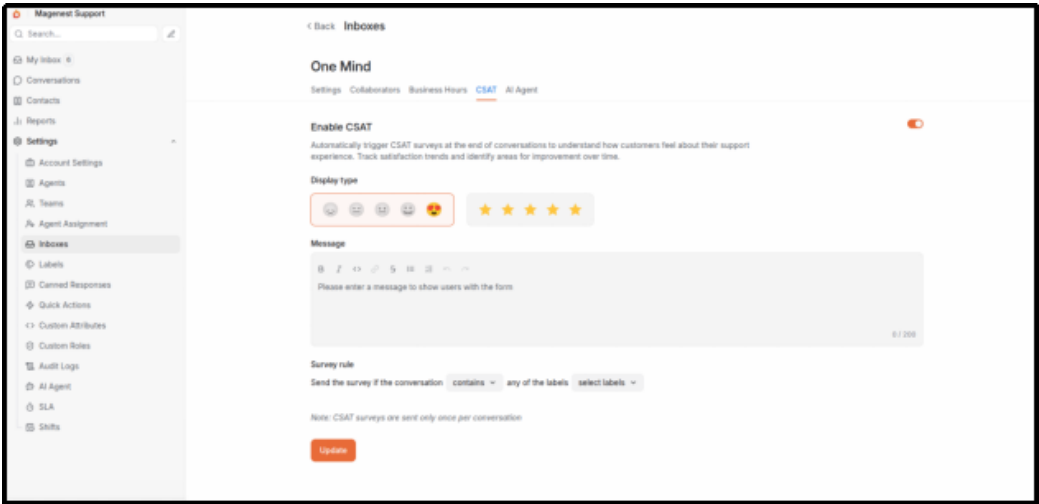
Playground tab testing a sample question

20. Customer Satisfaction Survey (CSAT)

20.1 Enable and Configure CSAT

Go to Settings > Inboxes, select the Inbox, and open the CSAT tab.

Field	Description
Enable CSAT	Main enable/disable switch
Display type	Choose smiley-based or star-based rating
Message	Question shown to the customer, for example “How would you rate this support experience?”
Survey rules	Label-based conditions for sending the survey; see Section 20.3



CSAT tab for an Inbox

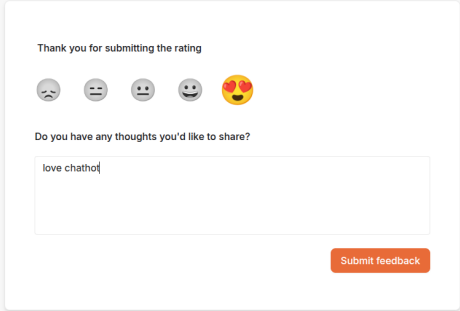
20.2 How Surveys Are Sent

When a conversation moves to Resolved, the customer receives a CSAT survey.

Channel	What the customer sees
---------	------------------------

Website	A smiley or star selector displayed directly in the chat widget
Facebook, Instagram, Zalo, TikTok, TikTok Shop, Lazada, Shopee, Telegram, LINE, WhatsApp	A message containing a link to a separate survey page
Email	A text message with a survey link

Customers rate the interaction from 1 to 5 and can leave a comment. Responses are locked after 14 days.



Thank you for submitting the rating

Do you have any thoughts you'd like to share?

love chathoi

Submit feedback

The survey is sent automatically as soon as the conversation is marked Resolved.

Each conversation receives the survey only once. If you Resolve a conversation, reopen it, and Resolve it again, the customer is not sent a second survey.

20.3 Label-Based Survey Rules

Survey rules provides two options:

Contains - send the survey only when the conversation has at least one of the selected Labels.

Does not contain - do not send the survey when the conversation has any of the selected Labels.

Practical example: choose Does not contain and add the spam and test Labels so surveys are not sent for junk or test conversations.

Leaving the Label list empty means the survey is sent for all conversations.

20.4 View CSAT Results

Results are available under Reports > CSAT and can only be viewed by Administrators. The page shows the average score, number of responses, response rate, and each individual response with the customer's comment. See Section 21.

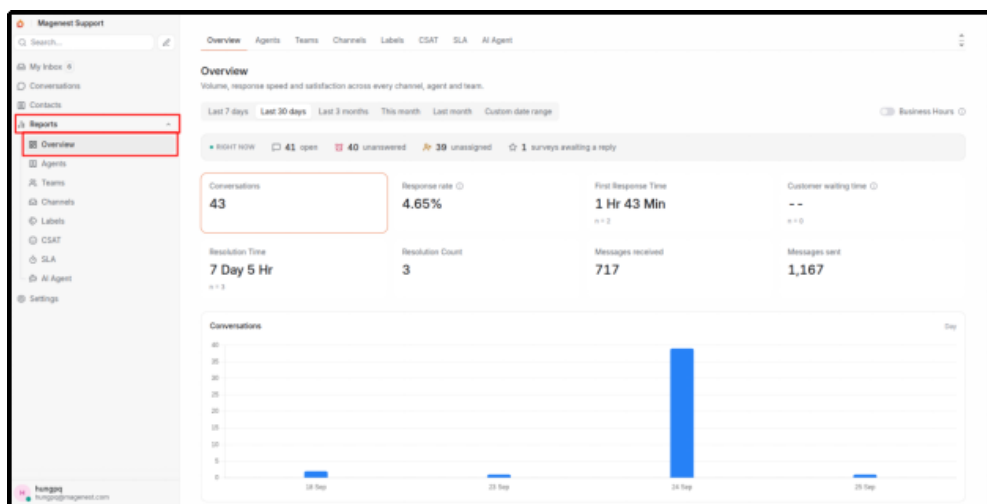
Exporting CSAT results to CSV is not currently available.

20.5 Operational Guidance

Because the survey is sent whenever a conversation moves to Resolved, only Resolve a conversation when the work is genuinely complete. Use Pending for unfinished work so the satisfaction metrics reflect completed support interactions accurately.

21. Reports and Analytics

Reports is available from the left sidebar and can only be viewed by Administrators. The page contains six tabs that share the same date filter at the top.



Overview tab: date filter, Current snapshot, KPI cards, and chart

21.1 Shared Filters

Control	Notes
Date range	7, 30, or 90 days, or Custom to set a start and end date
Count business hours only	Measure response and resolution times only during the Business Hours configured for each Inbox

Inboxes without Business Hours configured continue to use real elapsed time rather than being treated as zero. This keeps the metrics meaningful even if a company has configured working hours for only some Inboxes.

The selected filter is preserved when you switch tabs. The system automatically chooses whether to group data by hour, day, or week based on the selected date range, so no manual adjustment is required.

21.2 Six Shared Metrics

Metric	Meaning
Conversations	Number of conversations opened during the selected period
Resolved	Number of times conversations moved to Resolved during the selected period
Response Rate	Percentage of conversations that received at least one reply from an Agent
First Response Time	Average time customers waited for the first Agent reply
Response Time	Average time customers waited for later replies after the first response
Resolution Time	Time from when a conversation opened until it moved to Resolved

Response Time shows whether the team continues to follow up throughout the conversation, not just whether the first response was fast. A team that replies within one minute and then leaves the customer waiting half a day may have an excellent First Response Time but a poor Response Time.

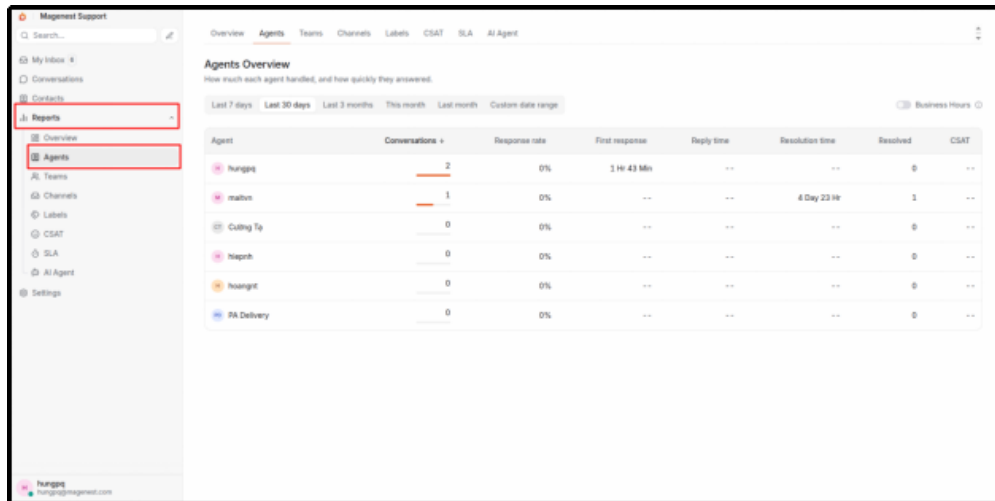
AI assistant replies do not count as human responses. Only messages sent by an Agent are included in Response Rate and First Response Time. This is intentional: a bot replying in two seconds does not necessarily mean the customer has received human support.

21.3 Six Report Tabs

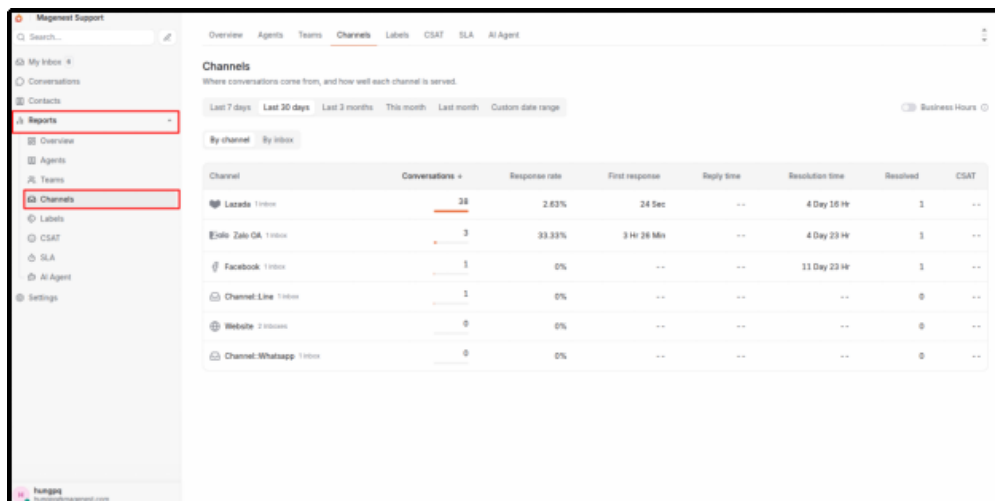
Tab	What it answers
Overview	Trends over time, plus a Current snapshot showing how many conversations are Open, unanswered, unassigned, and how many surveys have no response.
Agents	How much work each Agent handled and how quickly they responded.

Teams	Workload and response performance by Team.
Channels	Where customers come from, either aggregated by channel or broken down by individual Inbox.
Labels	Which types of work account for the largest share, based on the Labels your team uses.
CSAT	Customer satisfaction scores and individual responses.

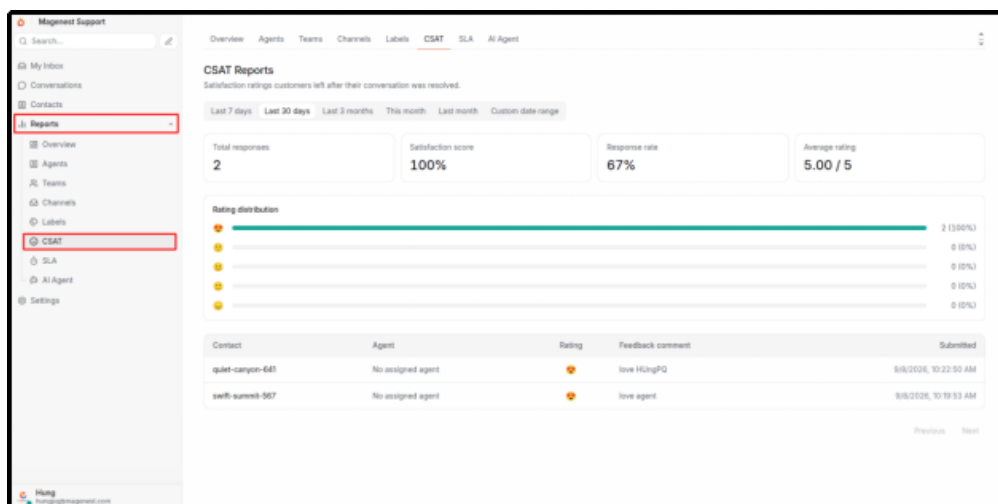
The KPI cards at the top of the page also act as chart selectors. Click a card to plot that metric in the chart below. The system chooses a bar or line chart automatically based on the type of metric.



Agents tab: workload and response performance by Agent

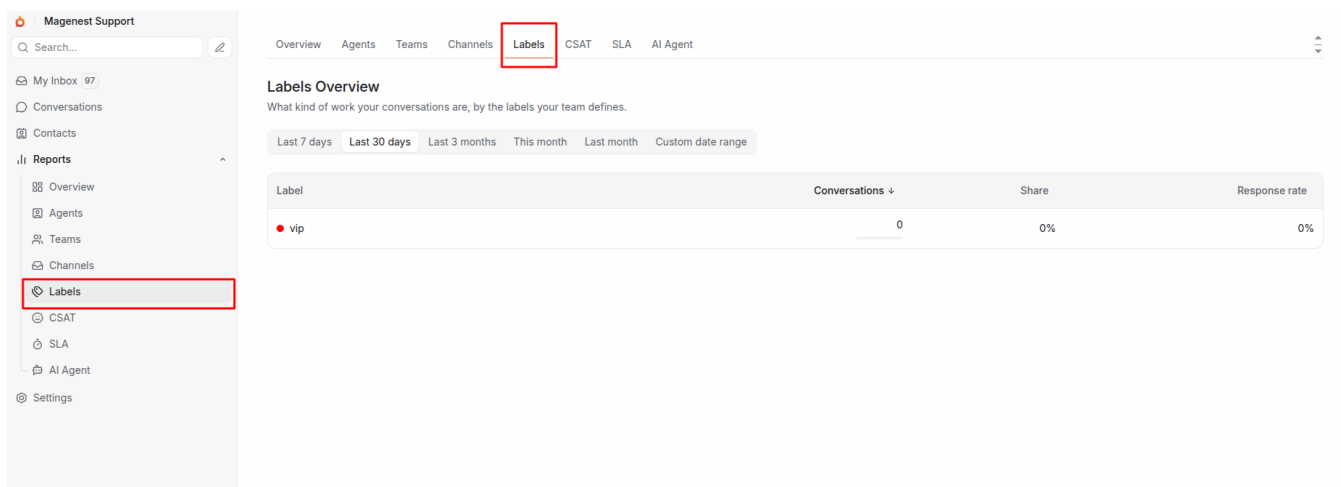


Channels tab: view aggregated channel performance or drill down by Inbox



CSAT tab: satisfaction scores and individual customer responses

The Labels tab contains only three columns—Conversations, Share, and Response Rate—instead of the seven columns available in the other tabs. This is intentional. A conversation can have multiple Labels, so calculating average handling times per Label would count the same conversation under every Label it carries and produce misleading results. Simple volume counts do not have that problem.



Labels tab: only three columns because a conversation can have multiple Labels at the same time

21.4 Known Reporting Limitations

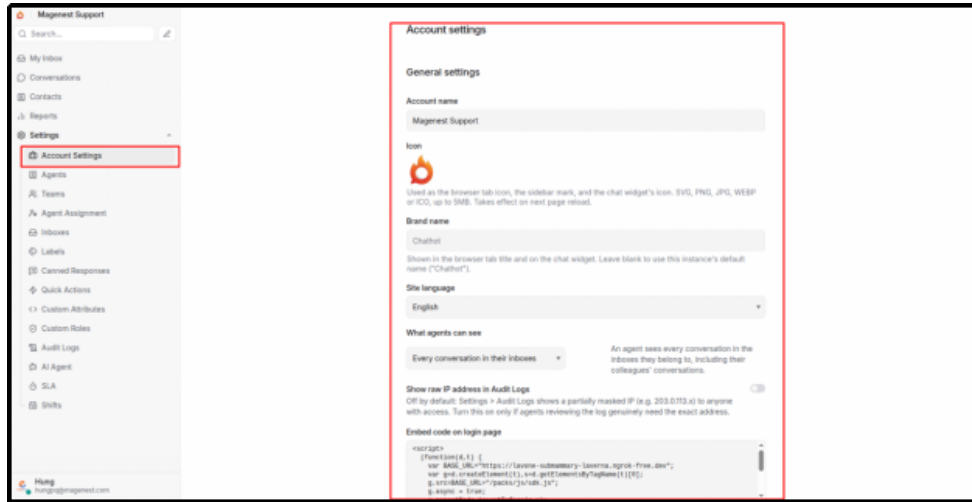
Item	Status
Export reports to CSV or Excel	Not available
Agents can view their own performance metrics	Not available; Reports are currently Administrator-only
Data from before this version update	Conversation volume and Resolution Time are backfilled; Response Time is available only from the update date onward

22. Account and Profile Settings

22.1 Settings > Account Settings - Administrators Only

Field	Notes
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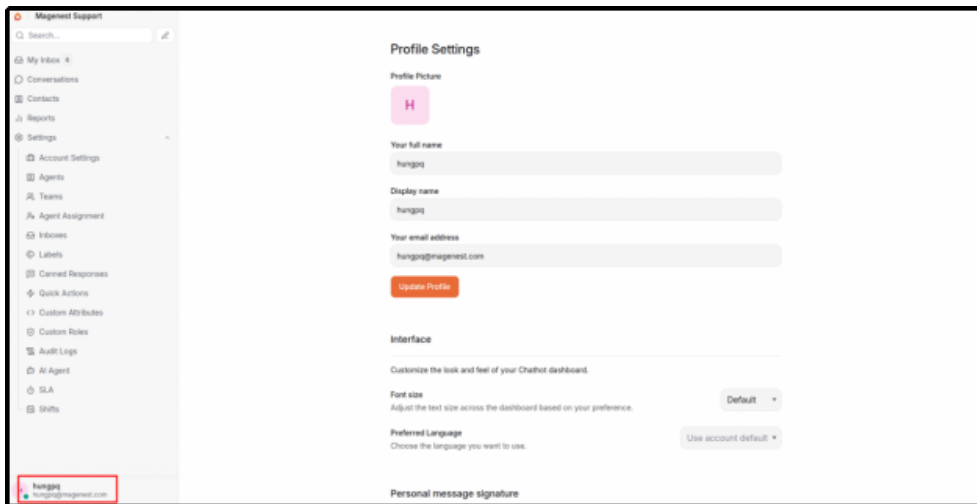
Company name	Displayed throughout the interface
Default language	Applied to Agents who have not selected their own language
Domain, Support email	
What conversations can Agents see?	Controls Agent conversation scope: only their own work, their Team's work, or all conversations in Inboxes where they are a Collaborator. Changes take effect company-wide immediately. See Section 17.8.
Branding (name and logo)	Replace the default branding on the interface, login page, and chat widget. Leave blank to use Chathot branding.
Show full IP in Audit Logs	Off by default. Audit Logs normally show partially masked IP addresses. Enable only when reviewers genuinely need the exact IP address.



Company account settings

22.2 Profile Settings - Available to All Users

Setting	Description
Personal information	Display name, avatar, and email address
Change password	
Message Signature	Signature automatically appended to customer messages when the signature control is enabled
Interface	Language and conversation list display preferences
Audio Notifications	Sound alert for new messages; recommended
Notifications	Choose which notification types you receive; see Section 12.3
Access Token	Token used to connect external systems; includes a regenerate option
MFA	Not currently available



Personal Profile Settings page

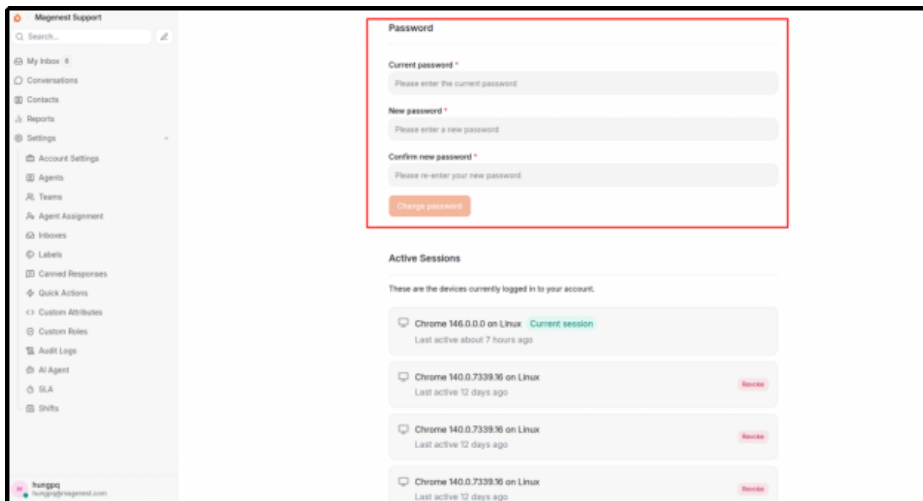
22.3 Active Sessions

Under Profile Settings > Active Sessions, you can see every device and browser currently signed in to your account, including browser type, operating system, most recent activity, and which session you are using right now.

If you see an unfamiliar session—for example, a login from a computer that is not yours—click Revoke to sign that session out immediately. You do not need to change your password first.

You cannot revoke the session you are currently using to view this page.

The system does not currently determine the geographic location (city/country) of each session, so the location column remains blank.



Active Sessions list in Profile Settings

Part D - Reference

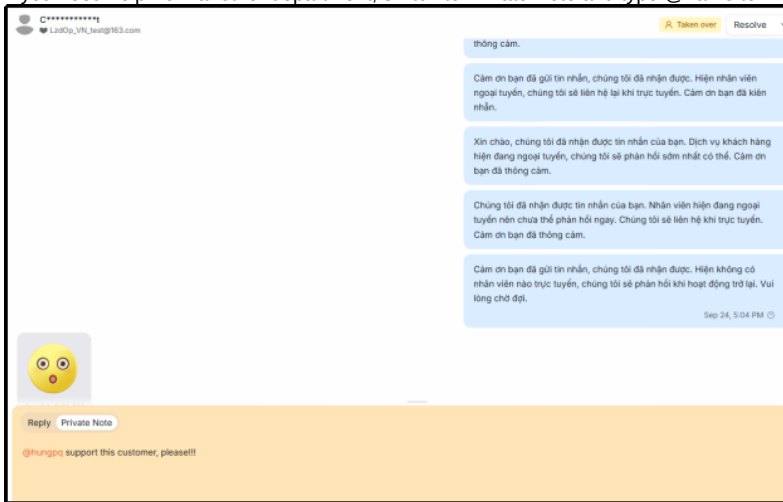
23. Recommended Workflows

23.1 Start of Shift

1. Open Chatbot, click your avatar, and set your status to Online.
2. Open Unassigned and claim any conversations that are not yet being handled by assigning them to yourself.
3. Open Mine, filter to Open, and work through conversations based on the Priority indicators shown in the list.
4. Check Mentions to see whether any colleague has requested your help.

23.2 Handle a Conversation

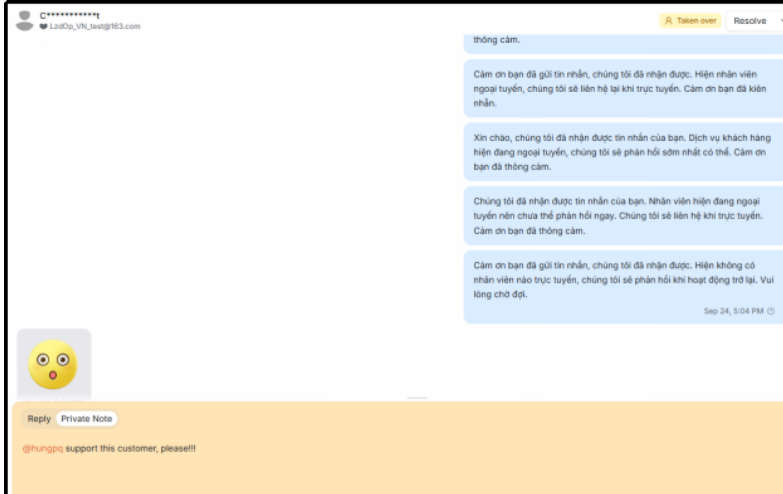
1. Open the conversation and review Previous Conversations in the right-hand panel to understand what the customer has contacted you about before.
2. Reply from the Reply tab. Type / to use a Canned Response when the answer is one you send frequently.
3. If you need help from another department, switch to Private Note and type @name to mention the relevant person.



4. If the case is not complete but you are waiting for something, change the status to Pending. If you have promised the customer an update at a specific time, Snooze the conversation until that time.
5. When the work is fully complete, click Resolve. If the customer comes back later, Chathot either reopens the same conversation or creates a new one depending on the channel. See Section 9.2.

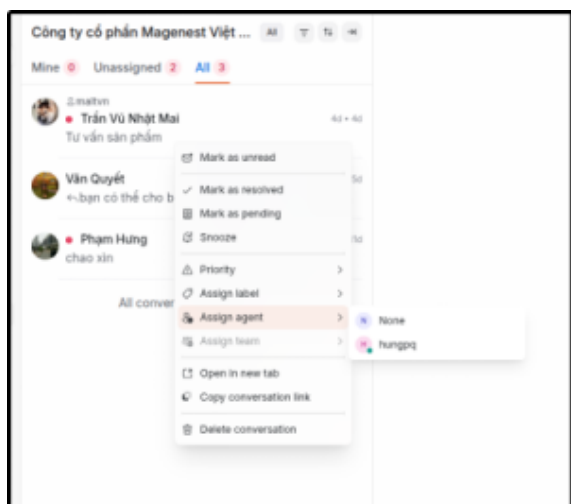
23.3 Transfer Work to Another Agent

1. Add a Private Note summarizing the current situation for the person taking over.
2. Type @name in the same note so they are notified immediately.



3. Change the Assignee to that Agent, or assign the conversation to the appropriate Team.

- Right-click the conversation you want to reassign to another Agent.



If the conversation already has an Assignee, that current Assignee is not shown as a reassignment option.

23.4 End of Shift

1. Review Mine with status Open. Reassign anything you cannot finish to the next shift, or return it to Unassigned with a Private Note explaining the situation.
2. Set your status to Offline.

24. Keyboard Shortcuts

Press Ctrl + / (Mac: Cmd + /) at any time to open the keyboard shortcut reference.

Navigation

Key	Action
Alt + J and Alt + K	Move to the previous or next conversation
Alt + C	Go to Conversations
Alt + V	Go to Contacts
Alt + S	Go to Settings
Alt + N	Move to the next list tab (Mine, Unassigned, All)
Alt + O	Collapse or expand the sidebar
Up/Down arrow keys	Move through dropdown lists

Conversation Actions

Key	Action
Alt + E	Mark the open conversation as Resolved
Ctrl + Alt + E (Mac: Cmd + Alt + E)	Resolve the current conversation and move to the next one. This is especially useful when clearing a backlog.
Alt + M	Open the Snooze menu

Message Composer

Key	Action
Enter	Send message
Shift + Enter	Insert a new line

Alt + L	Switch to Reply
Alt + P	Switch to Private Note
Ctrl + Alt + A (Mac: Cmd + Alt + A)	Attach a file
/	Insert a Canned Response

25. Feature Status

Fully Supported

Core: Login, email invitations for Agents, 40-language interface, keyboard shortcuts, and Agent availability status.

Conversations: real-time conversation list; filters by status, Assignee, channel, Label, and Team; advanced filters; Folders; sorting; Unattended; Mentions; replies across all 13 channels; two-way file attachments on Website, Email, and Facebook; Canned Responses; Private Notes; @Mentions; Participants; Agent assignment; Team assignment; Priority; Labels; Snooze with automatic reopening; automatic reopening when the customer messages again; Mute and Unmute; mark as unread; right-click menu; bulk actions; delete conversations; delete messages; review previous conversations with the same customer; resize the composer; auto-saved drafts; signatures; and Chathot Agent, the private AI assistant for Agents while composing replies.

Search: search Contacts, Conversations, and Messages; recent search history.

Contacts: view, search, create, edit, delete, and merge Contacts; Contact Labels; customer Notes; Active list; Segments; sorting; and conversation history.

Administration: connect all 13 channels (Website, Facebook, Instagram, Zalo, Email, TikTok, TikTok Shop, Lazada, Shopee, Telegram, LINE, WhatsApp, and Google Business Profile); Shifts; rotate the Website identity verification key; custom branding; Collaborators; Business Hours with after-hours assignment blocking and auto-replies; automatic greetings; email collection; Lock to single conversation; Pre Chat Form; Widget Builder; Agents; Teams; Labels; Custom Attributes; Canned Responses; Custom Roles; Agent conversation scope; two Auto Assignment mechanisms with Team routing; Workload Limit; queue reassignment scan; SLA Policies with breach alerts; the full AI Customer Assistant feature set; per-conversation bot/human control; CSAT surveys; six-tab reporting; Quick Actions; Audit Logs; bulk Agent invitations; and FAQ Suggestions, Message Reports, and Playground under AI Agent.

Notifications: real-time notification bell, My Inbox, audio alerts, and browser Push Notifications.

Supported with Limitations

Feature	Limitation
File attachments on Zalo, Instagram, TikTok, marketplace channels, Telegram, and WhatsApp	Files sent by customers can be received, but outbound messages currently support text only.
Shopee channel	Implemented but not yet verified on a live Shopee account. Shopee is also not granting Chat API access to new applications; see Section 15.9.
WhatsApp channel	Manual Cloud API setup only. Template messages are not supported, so free-form replies cannot be sent more than 24 hours after the customer's last message. Temporary tokens expire after roughly 24 hours.
Google Business Profile channel	Reviews only. Each review supports one public reply; sending another overwrites the previous reply on Google. New reviews are checked about every 2 minutes. AI Customer Assistant is not supported.
Delete message	Deletes only the copy stored in Chathot; it does not recall a message already delivered to the customer. Cannot be undone.
Shifts	Affect Auto Assignment only. They do not change conversation visibility or Online status.
Notification settings	Push Notifications are fully supported in the browser (Section 12.5). The Email column does not yet send real notification emails.
Business Hours	Customer-facing availability applies only to Website chat. Auto Assignment blocking and after-hours auto-replies apply across channels.
Allow messages after resolved	Affects only the Website chat widget interface.
AI Budget	Warning only; does not automatically stop AI requests.
Snooze	Reopens automatically at the scheduled time, but the scheduler can be up to one minute late.
Queue reassignment scan	Runs once per minute, so reassignment can be delayed by up to one minute. Conversations inactive for more than 7 days are skipped.

SLA Policies	Provide targets, countdown timers, and breach alerts. A breach only triggers a notification; it does not reassign the conversation or increase Priority. New companies do not have a default SLA Policy and must create one.
Reports	Administrator-only; CSV export is not available. Response Time data is available only from the date this version was deployed onward.
Status change history	The system records who changed each status and when, but there is currently no dedicated screen for viewing the full history.

Visible in the Interface but Not Currently Working

Conversations: Send transcript, which is intended to email a conversation transcript.

Contacts: CSV import, CSV export, and calling a Contact.

Administration: Agent Bots, Security and SAML, MFA, deleting the company account, and exporting CSAT results to CSV.

Not Available in the System

Automation, third-party integrations, billing, Help Center, campaigns, and the SMS, Twilio, and Voice channels.

26. Troubleshooting

Display and Access Issues

I can sign in, but I do not see any conversations.

You have not been added as a Collaborator on any Inbox. Ask an Administrator to go to Settings > Inboxes, select the Inbox, open Collaborators, and add you.

I could see a colleague's conversations yesterday, but I cannot see them today.

An Administrator may have changed "What conversations can Agents see?" under Settings > Account Settings to a more restrictive scope. The data has not been deleted. See Section 17.8.

I can see Settings, but the only option inside it is Canned Responses.

This is expected. You are signed in as an Agent, so the system hides Administrator-only settings and shows only the options available to your role.

A colleague says they did not receive a notification when I mentioned them.

They are not a Collaborator on that Inbox. Chathot silently ignores mentions of users who are not eligible.

Missed Work and Notification Issues

A customer replied, but I cannot find the conversation in the list.

When a customer replies, Chathot automatically reopens a Resolved or Snoozed conversation, so it should return to the Open filter. If you still cannot find it, check whether the conversation is Muted, because Mute intentionally prevents automatic reopening. Click Unmute to restore normal behavior.

A new customer messaged us, but nobody received a notification.

The "new conversation" notification type is disabled by default. Each user must enable it under Profile Settings > Notifications. See Section 12.3.

New conversations are not being assigned automatically.

Check all five conditions in Section 18.1. The three most common causes are: everyone is Offline, the current time is outside configured Business Hours, or all eligible Agents have reached the Workload Limit. In all three cases, the conversation remains in Unassigned and is automatically reconsidered within one minute after the conditions become valid again. See Section 18.5.

I do not receive email or notifications after closing the tab.

The system does not currently send notification emails. Push Notifications are supported; see Section 12.5. Enable the Push column under Profile Settings > Notifications and allow notifications in the browser. If you still do not see alerts, enable Audio Notifications and keep a Chathot tab open while you work.

A Snoozed conversation did not reopen exactly on time.

The scheduler checks once per minute, so reopening can be delayed by up to one minute. If the delay is longer, ask an Administrator to check whether the server-side scheduler service is still running.

Channel Issues

Zalo is connected, but no messages are coming in.

The OA Webhook Secret has not been added to the Inbox Configuration tab. See Section 15.4.

LINE is connected, but no messages are coming in.

The Callback URL has not been added to the Webhook URL in LINE Developers Console, or Use webhook has not been enabled. See Section 15.11. The webhook URL must also use HTTPS with a valid certificate.

Telegram connection fails or the bot does not receive messages.

Check that the token is still valid—it may have been regenerated in @BotFather—and confirm that the bot is not already connected to another Inbox. The bot accepts only private chats, not group messages. See Section 15.10.

WhatsApp outgoing messages suddenly show Failed after working normally.

The two most common causes are: more than 24 hours have passed since the customer's last message, or the temporary Meta access token has expired after roughly 24 hours. Add a new long-lived token to the Inbox. See Section 15.12.

A new Google review has not appeared in Chathot yet.

Chathot checks for new reviews approximately every 2 minutes, so wait briefly. If it still does not appear, open the Inbox and check whether reconnection is required.

New conversations stopped being auto-assigned after the company started using Shifts.

An Agent who has not been added to any Shift, or who is currently outside their Shift hours, will not receive Auto Assignment. Review Settings > Shifts. See Section 17.13.

Outgoing Messenger, Zalo, or Instagram messages show Failed.

The usual cause is that more than 24 hours have passed since the customer's last message, which is a platform-level restriction. Another possibility is that the channel connection has expired; open the Inbox and check for a reconnect option. Chathot does not automatically retry Failed messages.

Email messages are not being received.

Check that IMAP is enabled and, for Gmail, that you are using an App Password. Chathot checks the mailbox once per minute, so there can be a delay of up to one minute.

I created an Email Inbox, but nothing happened.

This is expected—you have only completed Step 1. Open the Inbox Settings and configure IMAP and SMTP. See Section 15.5.

The automatic greeting is not being sent.

Check that Enable greeting message is turned on in the Inbox Settings tab and that a greeting has been entered. The greeting is sent only for the customer's first message in a conversation.

Filter and Search Issues

A filter returns fewer results than expected.

Check how the conditions are combined: A AND B OR C is evaluated as (A AND B) OR C, in top-to-bottom order, with no mathematical operator precedence. If the logic becomes too complex, split it into two separate Folders.

Filtering by Label does not return older conversations.

Label filters run on the server and should return complete results. Check the Label name. Labels are converted to lowercase when created, so VIP and vip are treated as the same Label.

AI Customer Assistant Issues

The AI does not reply.

Follow the seven-step checklist in Section 19.8. Start by checking whether the conversation shows "You have taken over."

The AI gives incorrect product information.

See Section 19.9.

The AI keeps replying even though an Agent is handling the conversation.

The Agent must actually send a message before Chathot automatically switches to human takeover; simply opening and reading the conversation does not count. To stop the bot immediately after opening a conversation, click Take over at the top. See Section 9.8. Once taken over, the AI stays silent and no longer resumes automatically after 2 hours as in older versions.

The AI answers sensitive topics that should be handled by a human.

Add keyword Assignment Rules for those topics under Settings > AI Agent > Assignment Rules. When a rule matches, the AI stops and the conversation is routed to a human.

The AI hands over too many conversations and rarely answers automatically.

Read the handover reason displayed beneath the control at the top of the conversation. If most reasons say that the bot could not find sufficiently relevant documentation or that the answer was not supported by any document, the Knowledge Base does not contain enough coverage. Add more documents, or disable Knowledge Base for that Inbox so the AI answers from the System Prompt as before. See Section 19.4.

User and Staffing Issues

A new Agent did not receive the invitation email.

Outgoing email may not be configured. As a temporary workaround, ask the user to select Forgot password on the login screen and set their password that way.

A new Agent can sign in, but the workspace is empty.

They have not been added as a Collaborator on any Inbox.

27. English-Vietnamese Glossary

English term	Vietnamese UI label	Meaning
Inbox / Channel	Hộp thư / Kênh	A connected communication channel
Conversation	Các trò chuyện	A message thread with a customer
Contact	Liên hệ	Customer profile
Agent	"i Lý" (machine translation)	Support Agent
Administrator	Quản trị viên	Administrator with full system configuration access
Collaborators	Cộng tác viên	Agents allowed to work in a specific Inbox
Assignee	Người gán	The Agent responsible for a specific conversation
Unassigned	Chưa gán	No Agent is currently assigned
Unattended	Không giám sát	No one has replied to the customer yet
Mentions	Nhắc đến	Conversations where someone mentioned you
Private Note	Ghi chú riêng	Internal-only note that customers cannot see
Canned Response	Thư mẫu phản hồi	Prewritten reply inserted by typing /
Label	Nhãn	Tag used to categorize conversations or Contacts
Team	Nhóm	Group of Agents, typically organized by department or function
Folder	Thư mục	Saved conversation filter
Segment	Phần khúc	Saved Contact filter
Custom Attribute	Thuộc tính tùy chỉnh	Company-specific data field
Business Hours	Giờ làm việc	Configured operating hours for an Inbox
Pre Chat Form	Biểu mẫu trước khi trò chuyện	Form shown before a Website chat begins
Widget	Khung chat trên website	Website chat interface shown to customers
CSAT	CSAT	Customer satisfaction survey
Snooze	Tạm ẩn	Temporarily hides a conversation until a scheduled time
Resolve	Ghi quyết	Marks a conversation as complete
Mute	Tắt tiếng	Closes a conversation and prevents automatic reopening for 6 days
Knowledge Base	Kho tri thức	Documents used by AI for retrieval and grounded answers
System Prompt	System Prompt	Instructions that define how the AI should behave and respond
Assignment Rules	Quy tắc Phân công	Routes conversations based on message content
Assignment Policy	Chính sách phân công	Default method for distributing work

SLA	Cam kt SLA	Response and resolution time commitment
Bot mode	Bot ang tr li / Bn ã tip qun	Shows whether AI or a human Agent is currently responsible for customer replies
Reports	Báo cáo	Operational analytics for volume, response performance, and satisfaction
Macros / Quick Actions	Thao tác nhanh	Preconfigured sequence of actions that runs with one click
Audit Log	Nht ký hot ng	Administrative change history showing who created, edited, or deleted items; Administrator-only
Copilot / Chathot Agent	Chathot Agent	Private AI assistant for Agents; visible only to the Agent and never sent to customers
FAQ Suggestions	xut FAQ	AI-generated suggestions based on recurring customer questions that may be added to the Knowledge Base
Message Reports	Báo cáo tin nhn	Agent-submitted reports flagging incorrect AI replies for Administrator review
Playground	Playground	Test area for prompts and Knowledge Base behavior before enabling changes in live Inboxes
Active Sessions	Phiên ng nhp	List of devices currently signed in to your account; individual sessions can be revoked
Shift	Ca làm vic	Per-Agent working schedule used to limit Auto Assignment to Agents currently on shift
Push notification	Thông báo y	Operating-system notification that can appear even after the Chathot tab is closed
Review (Google)	ánh giá	Google review containing customer text and star rating; replies are posted publicly from Chathot
HMAC / Identity validation	Xác thc danh tính ngi dùng	Secret key used by the website to sign customer identity in the chat widget; the key can be rotated