



## Administrator User Guide

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## Accessing ManageChat

ManageChat is a web-based application and can be accessed from any location that has internet access, and a web browser that is at least Microsoft Internet Explorer version 6 compliant.

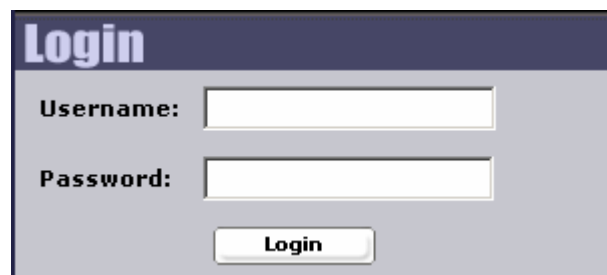
To connect to and use ManageChat you must first login at one of the following URL's

### *Administrator:*

<http://admin.chat.managechat.com>

### *Operator:*

<http://chat.managechat.com>

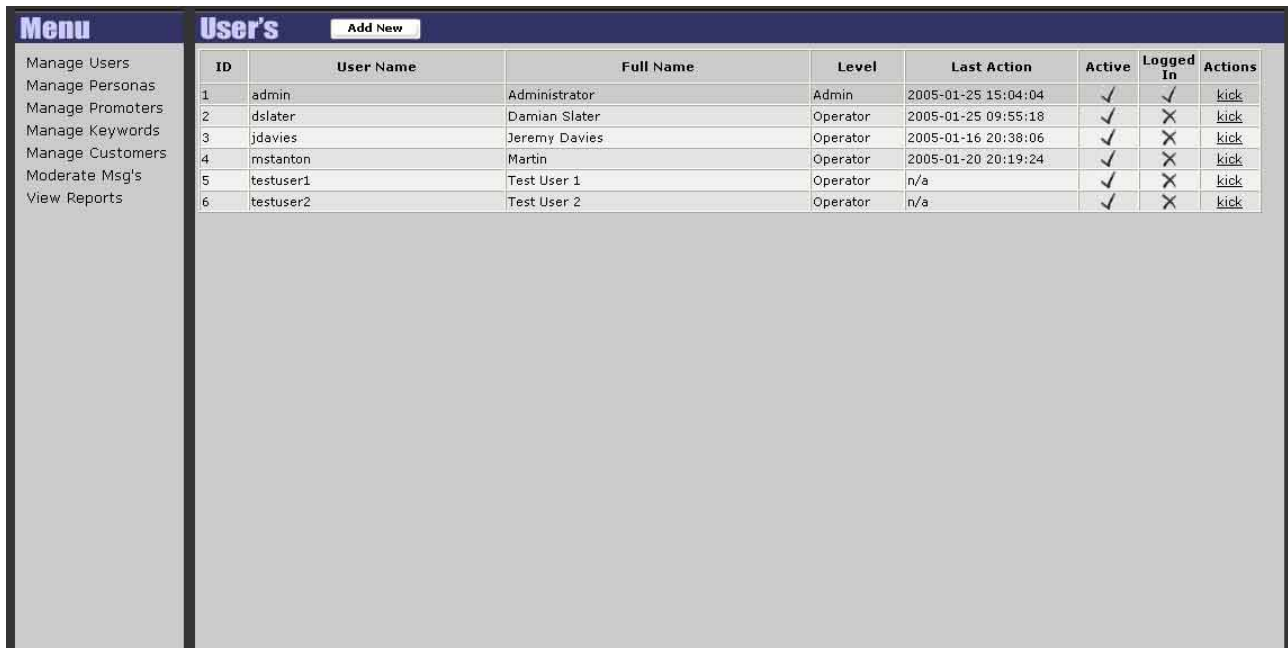
A screenshot of the ManageChat login interface. It features a dark blue header with the word "Login" in white. Below the header, there are two input fields: "Username:" and "Password:". The "Password:" field has a small eye icon to its right. Below the input fields is a "Login" button. The entire form is set against a light gray background.

At the login prompt, enter the user details that you have been given. There are two types of user, Administrator and Operator. If you attempt to use administrator user login details at the operator URL (and vice-versa) you will be asked to use the correct URL.

Operator logins can be subject to time constraints and account locks. If an operator is unable to login, a message will be displayed above the Username box indicating the reason.

# Administrator Interface

As an administrator, you will see the following screen...



The screenshot shows the Administrator Interface. On the left is a 'Menu' sidebar with options: Manage Users, Manage Personas, Manage Promoters, Manage Keywords, Manage Customers, Moderate Msg's, and View Reports. The 'Manage Users' option is selected. The main area is titled 'User's' and has an 'Add New' button. Below the title is a table with the following data:

ID	User Name	Full Name	Level	Last Action	Active	Logged In	Actions
1	admin	Administrator	Admin	2005-01-25 15:04:04	✓	✓	<a href="#">kick</a>
2	dslater	Damian Slater	Operator	2005-01-25 09:55:18	✓	✗	<a href="#">kick</a>
3	jdavies	Jeremy Davies	Operator	2005-01-16 20:38:06	✓	✗	<a href="#">kick</a>
4	mstanton	Martin	Operator	2005-01-20 20:19:24	✓	✗	<a href="#">kick</a>
5	testuser1	Test User 1	Operator	n/a	✓	✗	<a href="#">kick</a>
6	testuser2	Test User 2	Operator	n/a	✓	✗	<a href="#">kick</a>

The button in the top-right allows you to Logout.



Logout

It is important that you perform the logout using this button and not just closing the browser window. If the browser window is closed the system will not know that you have logged out and will prevent access from any other workstations. The system does check that your session is still active and will automatically disconnect inactive administrator sessions after 30 minutes.

On the left is the Menu. From this list choose the option that you want to perform. The Manage Users menu is selected by default.

The Administrator interface is the only place that customers mobile numbers (CLI's) are visible. An operator never sees the CLI.

*Note: You should remember that telephone numbers are subject to data protection regulations.*

# Managing Users

User's <span style="float: right;">Add New</span>							
ID	User Name	Full Name	Level	Last Action	Active	Logged In	Actions
1	admin	Administrator	Admin	2005-01-25 15:04:04	✓	✓	<a href="#">kick</a>
2	dslater	Damian Slater	Operator	2005-01-25 09:55:18	✓	✗	<a href="#">kick</a>
3	jdavies	Jeremy Davies	Operator	2005-01-16 20:38:06	✓	✗	<a href="#">kick</a>
4	mstanton	Martin	Operator	2005-01-20 20:19:24	✓	✗	<a href="#">kick</a>
5	testuser1	Test User 1	Operator	n/a	✓	✗	<a href="#">kick</a>
6	testuser2	Test User 2	Operator	n/a	✓	✗	<a href="#">kick</a>

The User's list shows all configured user accounts. The Level denotes the account access level, either Admin or Operator. The Last Action column shows the date and time that the user performed any action. Active indicates if the account is allowed to be used and Logged In shows if the account is currently being used. Using this information, an administrator can clear a locked session or disconnect a user using the Kick link.

## Add a New User

To add a new user account, select the Add New button. A User form will be shown.

### User

**User Name:**

**Full Name:**

**Level:**

**Active:**

**Password:**

**Login Times:**  Override Time

	00	. 02	. 04	. 06	. 08	. 10	. 12	. 14	. 16	. 18	. 20	. 22	.
Mon													
Tue													
Wed													
Thu													
Fri													
Sat													
Sun													

Complete the new user details (user name and full name), choose the access level (operator or administrator), and enter a password for the new account. By default the new account is set to Override Time constraints on the Login Times.

### Editing Account Details

To edit an account, click on the line of account detail. The same User Form is shown, this time with the details for the selected account. All of the details except the username can be altered.

The screenshot shows a web form titled "User" with the following fields and options:

- User Name:** mstanton
- Full Name:** Martin
- Level:** Operator (dropdown menu)
- Active:**
- Password:** [masked with dots]
- Login Times:**  Override Time

Below the "Login Times" section is a grid for selecting active times. The grid has 7 rows (Mon-Sun) and 14 columns (00, 02, 04, 06, 08, 10, 12, 14, 16, 18, 20, 22). The cells from 06 to 12 are highlighted in blue, while all other cells are red.

	00	02	04	06	08	10	12	14	16	18	20	22	
Mon	Red	Red	Red	Blue	Blue	Blue	Blue	Red	Red	Red	Red	Red	Red
Tue	Red	Red	Red	Blue	Blue	Blue	Blue	Red	Red	Red	Red	Red	Red
Wed	Red	Red	Red	Blue	Blue	Blue	Blue	Red	Red	Red	Red	Red	Red
Thu	Red	Red	Red	Blue	Blue	Blue	Blue	Red	Red	Red	Red	Red	Red
Fri	Red	Red	Red	Blue	Blue	Blue	Blue	Red	Red	Red	Red	Red	Red
Sat	Red	Red	Red	Blue	Blue	Blue	Blue	Red	Red	Red	Red	Red	Red
Sun	Red	Red	Red	Blue	Blue	Blue	Blue	Red	Red	Red	Red	Red	Red

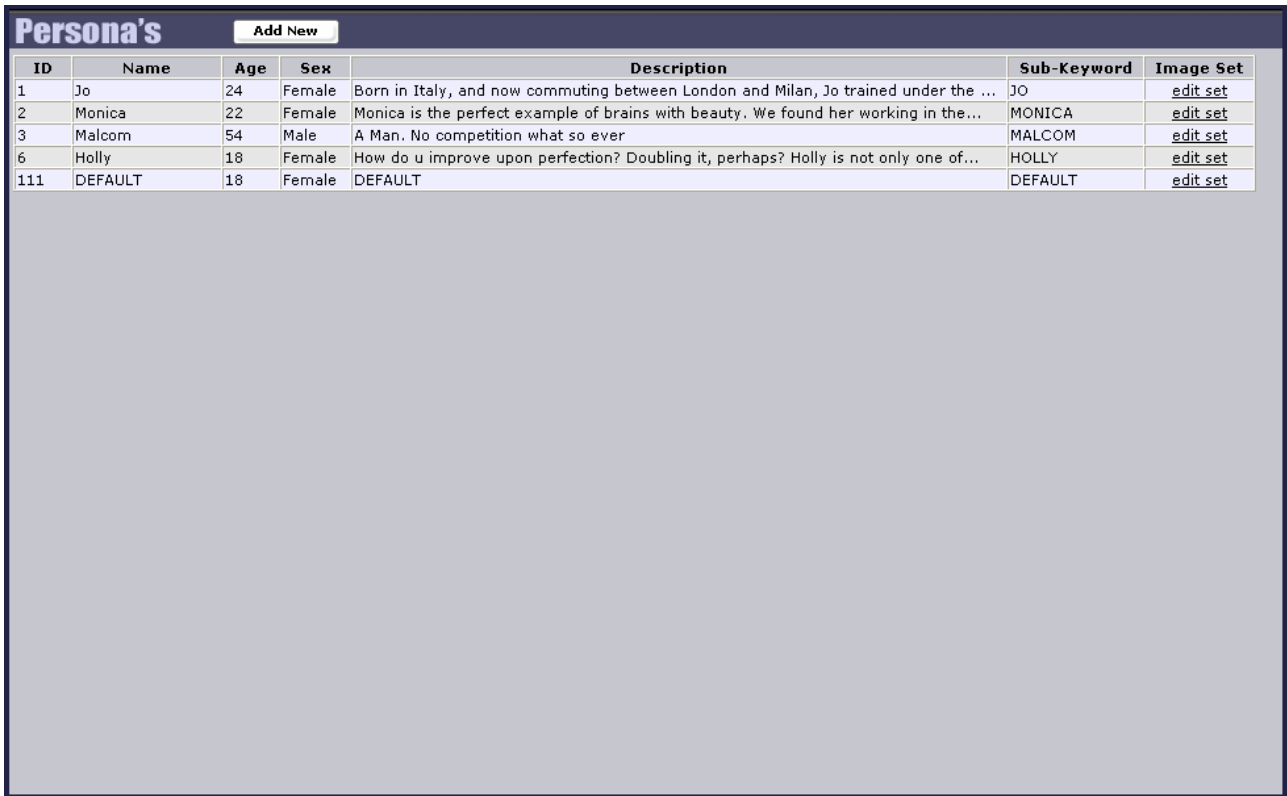
Buttons: Update, Close

### Login Times

To set the times that this account can be used, click on a red square to change it to blue and vice-versa. Make sure that the Override Time check box is de-selected for the login times to become active.

## Managing Personas

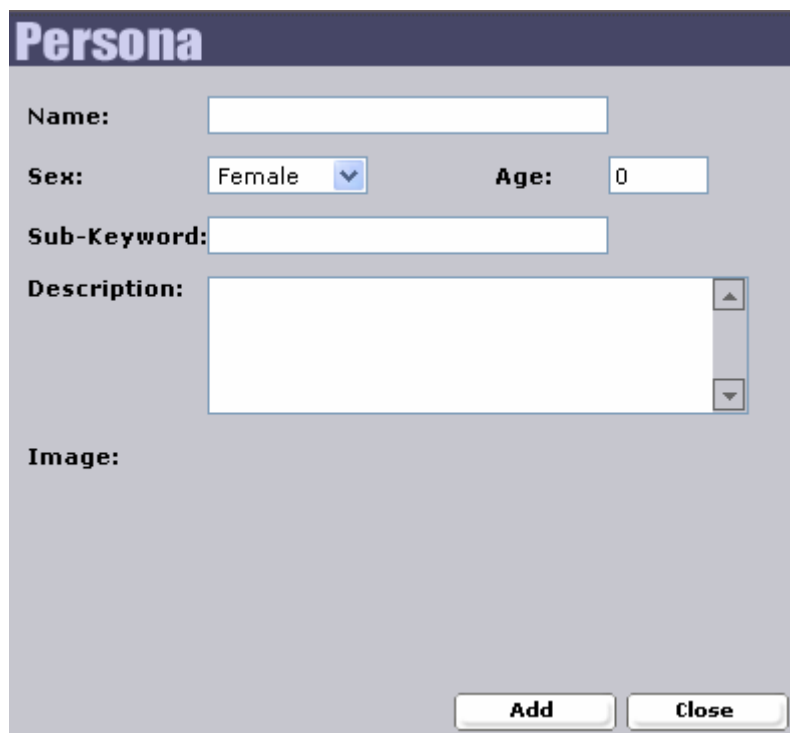
The persona is the 'person' that the customer thinks they are chatting to. There is always a Default persona which is used to catch any customer who does not specify who they wish to chat to.



The screenshot shows a web interface titled "Personas" with an "Add New" button. Below the title is a table listing several personas. The table has columns for ID, Name, Age, Sex, Description, Sub-Keyword, and Image Set. Each row includes an "edit set" link in the Image Set column.

ID	Name	Age	Sex	Description	Sub-Keyword	Image Set
1	Jo	24	Female	Born in Italy, and now commuting between London and Milan, Jo trained under the ...	JO	<a href="#">edit set</a>
2	Monica	22	Female	Monica is the perfect example of brains with beauty. We found her working in the...	MONICA	<a href="#">edit set</a>
3	Malcom	54	Male	A Man. No competition what so ever	MALCOM	<a href="#">edit set</a>
6	Holly	18	Female	How do u improve upon perfection? Doubling it, perhaps? Holly is not only one of...	HOLLY	<a href="#">edit set</a>
111	DEFAULT	18	Female	DEFAULT	DEFAULT	<a href="#">edit set</a>

To add a new persona, click on the Add New button.



The screenshot shows the "Persona" form with the following fields:

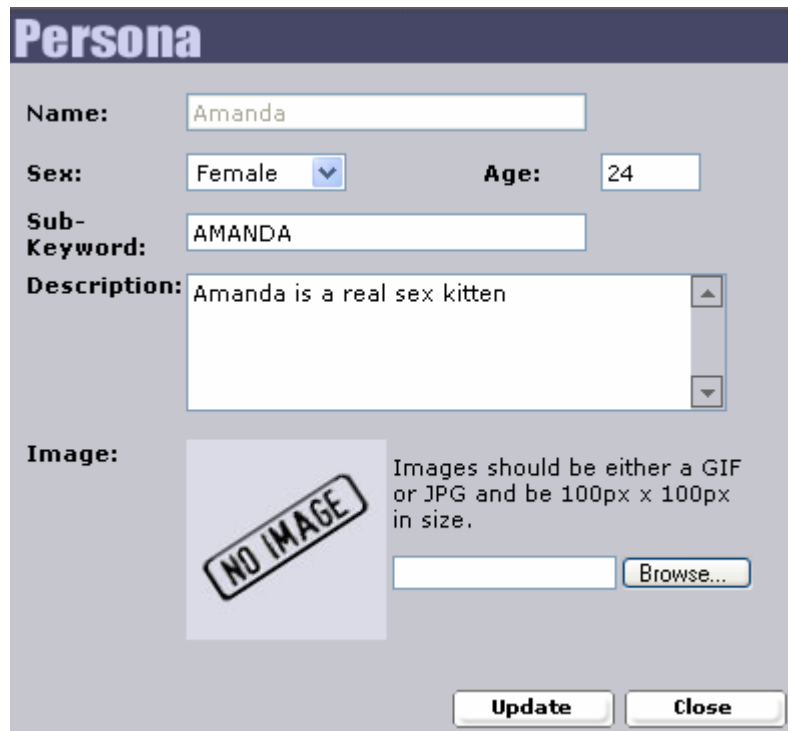
- Name:** A text input field.
- Sex:** A dropdown menu currently set to "Female".
- Age:** A text input field containing the number "0".
- Sub-Keyword:** A text input field.
- Description:** A large text area with scrollbars.
- Image:** A label for an image field, which is currently empty.

At the bottom of the form are two buttons: "Add" and "Close".

Enter a name for the Persona, choose the sex and specify an age. The Sub-Keyword is used to allow a customer to specify a persona when joining. Usually the sub-keyword will be set to the same as the persona name. Enter a description for the persona and click on Add.

Note: *You cannot set the persona image until you have created the persona.*

To add an image, select the new persona from the Persona's list



The screenshot shows a web form titled "Persona" with a dark blue header. The form fields are as follows:

- Name:** Text input field containing "Amanda".
- Sex:** Dropdown menu set to "Female".
- Age:** Text input field containing "24".
- Sub-Keyword:** Text input field containing "AMANDA".
- Description:** Text area containing "Amanda is a real sex kitten".
- Image:** A placeholder box with a diagonal "NO IMAGE" stamp. To its right, there is a text instruction: "Images should be either a GIF or JPG and be 100px x 100px in size." Below this is a text input field and a "Browse..." button.

At the bottom right of the form are two buttons: "Update" and "Close".

Click on the Browse button and choose an image file from your computer. Images must be 100 x 100 pixels and should be either JPG or GIF.

## Image Sets

Each persona can have an image set which contains pictures that can be sent to a customer as an MMS. To maintain the persona image set, click on the Edit Set link in the Persona's list.



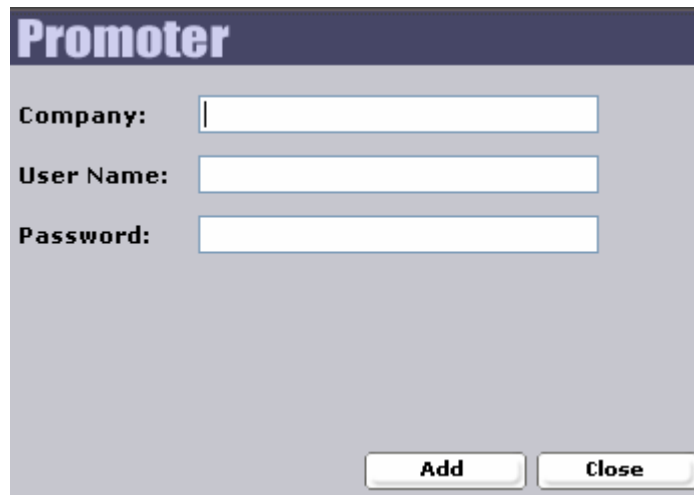
To upload a new image to the set, click on browse and choose an image from your computer. These images can be any size and should ideally be no smaller than 300 x 300 pixels. ManageChat will re-size the image to best-fit the customers' phone when it is sent.

To remove an image from the set, select the check box under the image to be removed and then click on Remove.

## Managing Promoters

Promoters are the people who are advertising a service. You will see your own name in this list. If you have a dedicated short-code you will be able to add a new promoter.

To add a new promoter, click on the Add New button.



The image shows a web form titled "Promoter" with a dark blue header. Below the header, there are three input fields: "Company:", "User Name:", and "Password:". Each field is a simple white text box with a blue border. At the bottom right of the form, there are two buttons: "Add" and "Close", both with a light gray background and a blue border.

Type in the promoter's company name, and specify a username and password. The username and password is used by the promoter to view their stats on the ManageChat we site at <http://www.managechat.com>

## Managing Keywords



The image shows a web interface titled "Keyword's" with a dark blue header. In the top right corner of the header, there is a button labeled "Add New". Below the header is a table with the following columns: "Keyword", "SCode", "Default Persona", "Welcome Msg", "Free Msg's", and "Action". The table contains six rows of data.

Keyword	SCode	Default Persona	Welcome Msg	Free Msg's	Action
BSUNLIMITED	89936	DEFAULT	Welcome to text chat	0	<a href="#">COPY</a>
CHAT	89074	DEFAULT	Welcome to 89074 Chat, U must be over 18 to use this service. Rcvd Msgs cst £1.50. send stop to exit	0	<a href="#">COPY</a>
JEZ	89936	DEFAULT	Welcome to Tornado	1	<a href="#">COPY</a>
MULTI	89936	DEFAULT	Welcome to Tornado Multi Persona Chat, A1 = Jo, A2 = Monica, A3 = Holly	0	<a href="#">COPY</a>
TORNADO	69166	DEFAULT	Welcome to Tornado on 69166	0	<a href="#">COPY</a>
TORNADO	89936	DEFAULT	Welcome to 89936 Tornado, U must be over 18 to use this service. Rcvd Msgs cst £1.50. send stop to exit	0	<a href="#">COPY</a>

Keywords are key to the configuration of ManageChat. Each keyword that is setup on your ManageChat account is shown in this list. To add a new keyword (if you have a

dedicated short-code) click on the Add New button. You can copy existing keywords and edit it

The screenshot shows a web form titled "Keyword" with the following fields and options:

- Keyword:** Text input field containing "TORNADO".
- ShortCode:** Dropdown menu showing "89936".
- Promoter:** Dropdown menu showing "Cumulus - Main Account".
- Free Msg's:** Text input field containing "0".
- Multi Persona:** Check box, currently unchecked.
- Persona's:** A list of names with checkboxes and adjacent text input fields:
  - Jo: checked
  - Monica: checked
  - Malcom: unchecked
  - Holly: checked
  - Amanda: unchecked
  - Anna: checked
- Default Persona:** Dropdown menu showing "DEFAULT".
- Welcome Msg:** Text area with a height of 57 pixels.
- Spend Warning:** Text area with a height of 73 pixels.

Below the form, there is a note: "Please Note: Welcome msg's and Spend Warning msg's must be ICSTIS compliant. Any msg that is not compliant will be modified. If you are unsure of the ICSTIS regulations please go here". At the bottom right, there are "Update" and "Close" buttons.

Enter the new keyword (no spaces) and choose the short-code that the new keyword will run on. Select the promoter that will be advertising the keyword. You can optionally enter an amount of free messages. These are used up as a customer joins the short-code/keyword session. If you check the multi persona check box, the customer can talk to more than just one persona at a time, in the box next to the persona's name you will have to put in another keyword this does not have to be the name of the persona, an example of how this works is below. In the Persona's list, select the personas that can interact with this keyword. Only personas selected in this list can have a customer re-assigned to them by an operator. Enter a welcome message and the spend warning message. Click Add to create the new keyword.

An example of a welcome message and spend warning message is given below.

### Welcome

Txt back ur D.O.B. and Name to start, U must be over 18 to use this service. Rcvd Msgs cst £1.50. Send STOP to 89290 to exit PO Box 6734, Derby, DE1 9EP.

## Spend Warning

You have spent £10.00, Msgs\Pics rcvd @ £1.50, To exit text STOP to 89290

Note: *You can include other promotional information in the spend warning message but the ICSTIS regulations MUST be adhered to.*

The welcome message is automatically sent back to a new customer when they start a new session. It is usual practice to set a welcome message that requests a name and age and specifies the costs. One free message is then set for the keyword which allows ManageChat to automate the join process and the ICSTIS guidelines are followed by telling the customer how much each message costs before billing commences.

## *The Default Persona*

When a customer joins a session they text in a KEYWORD to a SHORT-CODE. The keyword has a default persona assigned (called DEFAULT if you do not specify one) and when a customer sends in a keyword the persona assigned will be based on the default persona for that keyword.

One exception to this is the use of persona sub-keywords.

If a persona has a sub-keyword specified and the customer sends in more than one word in the join message, the second word is treated as the sub-keyword and ManageChat will attempt to assign the customer to a persona that has a matching sub-keyword.

Example:

The shortcode is 89290 and there are four keywords setup, CHAT, JO, SANDY and DONNA. There are four personas DEFAULT, JO, SANDY and DONNA. Each keyword has the respective default persona specified (CHAT=DEFAULT, JO=JO, SANDY=SANDY and DONNA=DONNA)

If the customer sends in CHAT to 89290 they will be assigned to DEFAULT. If they send in DONNA to 89290 they will be assigned to DONNA.

If the customer sends in CHAT SANDY to 89290 they will be assigned to SANDY.

In the second example the customer is assigned to SANDY because the second word in the join message matched a persona sub-keyword. If they had send in CHAT WITH ME to 89290 they would be assigned to DEFAULT as there is no match for WITH.

## *Multi Persona*

The customer would text in the keyword and then receive a test back. The next text that the customer would send will be the keyword in the box next to the persona's name and then their message. Then the customer could also send another text with a different keyword next to a different persona's name and message to chat to a different persona at the same time.

# Managing Customers

## Customer's

Mobile:  Name:   You can use wildcard (%) searching i.e. 4477% would bring back any number starting with 4477  
Please Note: Results are limited to 50 records

Mobile	SCode	Keyword	Name	Last Msg Sent	Msg's Sent	New Msg's	Status	Chatting To	History	Actions
447711112	89074	CHAT	<new user>	2005-01-26 11:10:48	1	0	Active	DEFAULT	<a href="#">view</a>	<a href="#">ignore</a> <a href="#">promote</a>
447711117	89936	TORNADO	<new user>	2005-01-26 11:24:57	6	1	Active	DEFAULT	<a href="#">view</a>	<a href="#">ignore</a> <a href="#">promote</a>
447711121	89074	CHAT	<new user>	2005-01-24 15:00:38	6	0	Active	DEFAULT	<a href="#">view</a>	<a href="#">ignore</a> <a href="#">promote</a>
447711142	89936	TORNADO	<new user>	2005-01-21 17:58:38	1	1	Active	Jo	<a href="#">view</a>	<a href="#">ignore</a> <a href="#">promote</a>
447711148			Damian Opera	2005-01-26 11:05:35	8	0	Inactive	n/a	<a href="#">view</a>	<a href="#">ignore</a> <a href="#">promote</a>
447711151	89936	TORNADO	<new user>	2004-11-22 23:42:39	1	0	Ignored	Jo	<a href="#">view</a>	<a href="#">ignore</a> <a href="#">promote</a>
447711157			Support Phone	2005-01-12 19:39:09	17	0	Inactive	n/a	<a href="#">view</a>	<a href="#">ignore</a> <a href="#">promote</a>
447711162			Jeremy	2004-11-02 15:44:51	7	0	Inactive	n/a	<a href="#">view</a>	<a href="#">ignore</a> <a href="#">promote</a>
447711167			Fred	2005-01-25 18:05:01	24	0	Inactive	n/a	<a href="#">view</a>	<a href="#">ignore</a> <a href="#">promote</a>
447711165			Damian	2005-01-25 18:02:35	45	0	Inactive	n/a	<a href="#">view</a>	<a href="#">ignore</a> <a href="#">promote</a>
447711165	89936	TORNADO	Fred	2005-01-14 14:33:35	4	0	Active	Jo	<a href="#">view</a>	<a href="#">ignore</a> <a href="#">promote</a>
447711166	89936	TORNADO	Richard	2004-10-08 15:48:11	1	1	Ignored	Holly	<a href="#">view</a>	<a href="#">ignore</a> <a href="#">promote</a>
447711166	89936	TORNADO	Cream Bun	2005-01-12 16:58:48	16	0	Active	Jo	<a href="#">view</a>	<a href="#">ignore</a> <a href="#">promote</a>
447711163	89936	TORNADO	fred	2004-10-05 15:46:30	3	1	Active	Jo	<a href="#">view</a>	<a href="#">ignore</a> <a href="#">promote</a>

The customer list shows all of the customers that have ever joined a session on your ManageChat account. This list will grow extremely large, so it is limited to 50 records. To filter the list to show the customer you wish to examine, enter either their Mobile Number or Name in the fields provided and click on the Refresh button.

To see the customer profile, click on the Mobile Number in the list. If you wish to view the chat session history, select the View link in the History column.

## History

**Name:** Cream Bun  
**Joined:** 05-Oct-2004  
**Age:** 18  
**Total Msg's:** 16

**Persona:** Jo  
**Start Date:** 10/5/2004 4:34:01 PM  
**End Date:**  
**Msg Count:** 16

Date Time	Message
16:58 12/01/2005	DSLATER said: Hello cream bun, how are you on this fine day :-)
16:57 12/01/2005	<input checked="" type="checkbox"/> Cream Bun said: Tornado monica
12:22 18/10/2004	DSLATER sent: Image 54. You can view this image <a href="#">here</a> .
12:22 18/10/2004	DSLATER said: Hi Jeremy, i hope you like my picture
12:21 18/10/2004	<input checked="" type="checkbox"/> Cream Bun said: tornado
12:01 18/10/2004	DSLATER sent: Image 53. You can view this image <a href="#">here</a> .
12:01 18/10/2004	DSLATER said: This is a test image to jeremy
12:00 18/10/2004	<input checked="" type="checkbox"/> Cream Bun said: tornado
16:00 08/10/2004	JDAVIES sent: Image 56. You can view this image <a href="#">here</a> .
16:00 08/10/2004	JDAVIES said: Here i am!
15:57 08/10/2004	<input checked="" type="checkbox"/> Cream Bun said: Me again
19:22 06/10/2004	JDAVIES said: Bang bang bang gang!
19:22 06/10/2004	<input checked="" type="checkbox"/> Cream Bun said: Hit me again
19:21 06/10/2004	JDAVIES said: Have a test message instead
19:20 06/10/2004	<input checked="" type="checkbox"/> Cream Bun said: Go on then

Within the history window, you can see all incoming and outgoing messages for this customer. You can also view any images that were sent to the customer by selecting the [here](#) link.

The Actions column has two options. Ignore and Promote.

Ignore is used to silence a customer. If the customer becomes a nuisance, select the Ignore link to stop any new messages from the customer's mobile entering your ManageChat account.

Promote is used to send out a free promotional message to the customer.

**Send Message**

**Mobile:** 07957 123456  
**Name:** Cream Bun  
**Keyword:** CHAT  
**From:**  Alpha-numeric string up to 11 characters

**Characters Left:** 160

Please Note: This will be a FREE message sent to the customer and will be charged to your account at your agreed free message rate.

**Send** **Close**

To send a promotional message, select the keyword, enter a From address (this could be the short-code) and enter your message. Click on the Send button to send the message.

*Note: Promote messages are subject to your free messages tariff.*

## Moderate Messages

**Message Log**

User: All Persona: All Keyword: All Last: 1 Day Refresh: 30 Secs

Date	User	Customer	Mobile	Message	Actions
11:24 26/01/2005	DSLATER	<new user>	447...	Image 52. You can view this image <a href="#">here</a> .	
11:24 26/01/2005	DSLATER	<new user>	447...	This is a test image on voda	
11:24 26/01/2005	DSLATER	<new user>	447...	Tornado	
11:24 26/01/2005	ADMIN	<new user>	447...	Welcome to 89936 Tornado, U must be over 18 to use this service. Rcvd Msgs cst £1.50. send stop to exit	
11:24 26/01/2005	ADMIN	<new user>	447...	Tornado	
11:10 26/01/2005	ADMIN	<new user>	447...	Welcome to 89074 Chat, U must be over 18 to use this service. Rcvd Msgs cst £1.50. send stop to exit	
11:10 26/01/2005	ADMIN	<new user>	447...	Chat	
11:05 26/01/2005	ADMIN	Damian Opera	447...	Test	
19:44 25/01/2005		Damian	447...	Stop	
19:12 25/01/2005		Damian	447...	Xxx	
18:06 25/01/2005		Fred	447...	Stop	
18:05 25/01/2005		Fred	447...	Hi	
18:05 25/01/2005	ADMIN	Fred	447...	Welcome to 89936 Tornado, U must be over 18 to use this service. Rcvd Msgs cst £1.50. send stop to exit	
18:05 25/01/2005	ADMIN	Fred	447...	Tornado	
18:03 25/01/2005		Damian	447...	Tornado	
18:02 25/01/2005	ADMIN	Damian	447...	Welcome to 89936 Tornado, U must be over 18 to use this service. Rcvd Msgs cst £1.50. send stop to exit	
18:02 25/01/2005	ADMIN	Damian	447...	Tornado	

As the administrator you can view all messages flowing through your ManageChat account. There will be many messages in this list, so there are filters at the top of the Message Log to enable you to see particular messages. By default, all users on all personas on all keywords in the last 30 minutes are shown. The list will be refreshed every 30 seconds. If you change any filters, click on the Refresh button.

The Actions column will contain two links Re-Assign and Reply, only if a message has not been replied to.

Re-Assign is used to change the operator that the message has been assigned to.

**Re-assign**

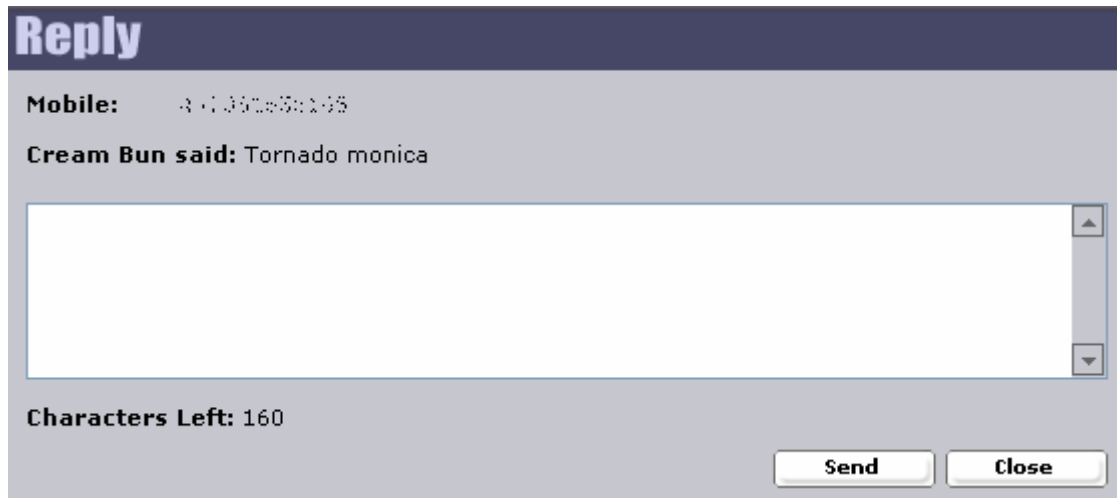
User:

Only logged-in operators are displayed in the User list. Select the new user to assign the customer to and then click the Update button.

*Note: After a customer has been re-assigned it is possible that both the old operator and the new operator will see the customer in their session lists. If the old operator attempts to reply to the customer they will be informed that the customer has been re-assigned to another operator.*

Reply enables you to send a message back to the customer directly without having to login as an operator. The message will be attributed to ADMIN in the session logs.

The incoming message text is shown next to **Customer Name said:** so that you can reply accordingly.








The screenshot shows a 'Reply' dialog box with a dark blue header. Below the header, the text 'Mobile: 413301898105' is displayed. Underneath, it says 'Cream Bun said: Tornado monica'. A large, empty text input field with a vertical scrollbar is positioned below the message. At the bottom left, it indicates 'Characters Left: 160'. At the bottom right, there are two buttons: 'Send' and 'Close'.

Enter the reply message text and click on Send.

# Reporting

ManageChat has several reports available. If you have a specific report requirement, contact ManageChat

## Report's

-  **User Activity Log**  
Display user activity by user name \ day.  
Please note: This report displays the amount of messages that have been sent by the operator, it does not show how many messages have been delivered.
-  **Active Customers (CSV Format)**  
Download all customers that are currently active
-  **Customer Inactivity (CSV Format)**  
Download all customers that have been inactive on the system for the given period
-  **Customers by Keyword (CSV Format)**  
Download all customers by keyword (A customer can appear on multiple keywords)
-  **New Customers (CSV Format)**  
Download all customers that have joined within the given period

Some of the reports require criteria and you should complete the fields as necessary.