

# ECS Admin - Branding

## Overview

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Within the ECS Admin Branding page you can customize the customer facing chat interface at a per BP Level by customize the font, logo, color settings, interface style and data fields for customer entry.

The screenshot displays the ECS Admin Branding page with a dark theme. The page is divided into several sections, each with a numbered red circle indicating a key feature:

- 1. BUSINESS PROCESS:** A dropdown menu labeled "Select a Business Process" with "Default" selected. Below it is a text field for "Customer access URL" containing "https://ecs-customer-chat.developer.evolveip.net/#/r/". There are checkboxes for "Override default theme" and "Apply current theme to multiple BPs".
- 2. INTERFACE STYLE:** Three radio buttons for "Primary", "Accent", and "Background" colors.
- 3. COLOR SETTINGS:** Three circular color swatches for "Primary", "Accent", and "Background".
- 4. CUSTOM LOGO:** A dashed box for "Drop your logo here" and a "SELECT A FILE" button.
- 5. TYPOGRAPHY:** A dropdown menu for "Select your default typeface" with "Roboto" selected.
- 6. ADDITIONAL OPTIONS:** Two checkboxes for "Enable custom date field" and "Enable custom number field". Each has a corresponding text input field.
- 7. Preview Pane:** A central area showing a preview of the chat interface with a blue wave logo, input fields for "Your Name \*", "E-mail Address \*", "Custom Date Field", and "Custom Number Field", and a "CHAT NOW" button.

At the bottom of the preview pane, it says "Last updated by AIRELAB\WebC.Supervisor1 on Feb 23 2021".

1. Business Process - select the business process to customize. The default theme will apply to all Business Process utilizing chat if no other templates are created.
2. Interface Style - select between a dark or light mode for the interface
3. Color Settings - customize the Primary, Accent and Background colors
4. Custom Logo - upload custom logo
5. Typography - select desired font for interface
6. Additional Options - option to show two additional customer input fields: Date and Number. Name and Email address are always mandatory.
7. Preview Pane - provides a preview of your customized template

## Customizing the Chat Interface

### Selecting a Business Process:

1. Select a Business Process to customize from the drop down. If you choose to select default, this will become the default theme for all Business Processes utilizing chat.

A close-up of the "BUSINESS PROCESS" dropdown menu. It shows the text "Select a Business Process" and "Default" with a downward arrow.

2. To customize a specific Business Process, select the BP from the drop down and check off the Override Default theme check box. This will override the default theme currently in place and save the new theme to the Business Process selected.

Select a Business Process

Technical Support

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Customer access URL

https://ecs-customer-chat.deve

☒ Override default theme

Apply current theme to multiple BPs

3. If you wish to apply the customized theme to a select few Business Processes, check off the override default theme option and click on the 'Apply current theme to multiple BPs' pop out.

Select a Business Process

Technical Support

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Customer access URL

https://ecs-customer-chat.deve

☒ Override default theme

Apply current theme to multiple BPs

a. A new window will open for you to select which BPs you want to apply the customized chat interface. After selecting the relevant BPs, select Accept to apply the changes.

IP SUMMARY BR

Customer access URL

https://ecs-customer-chat.deve

☒ Override default theme

Apply current theme to multiple BPs

INTERFACE STYLE

COLOR SETTINGS

Primary

Select business processes

☒ Technical Support

☒ Customer Service

☐ Sales

☐ Operator

☒ Contact Center

☐ Engineering

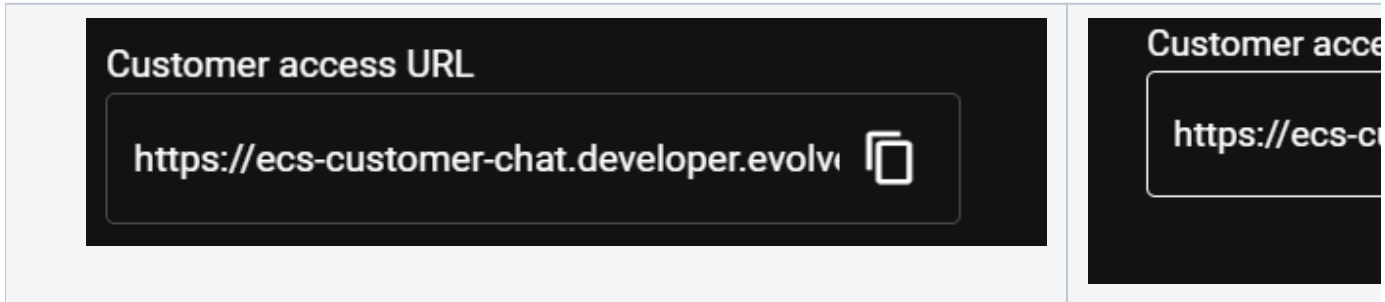
☐ Client Technology

☐ Dialer

☐ Yuly

CLOSE ACCEPT

4. The Customer Access URL is the URL you will utilize to implement chat within your organization. When ready, select the copy text icon to copy the full link.

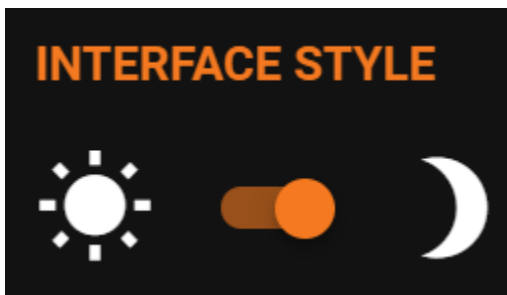


5. Once the Business Process have been applied you can select the Interface style for the interface.

### Choosing an Interface Style



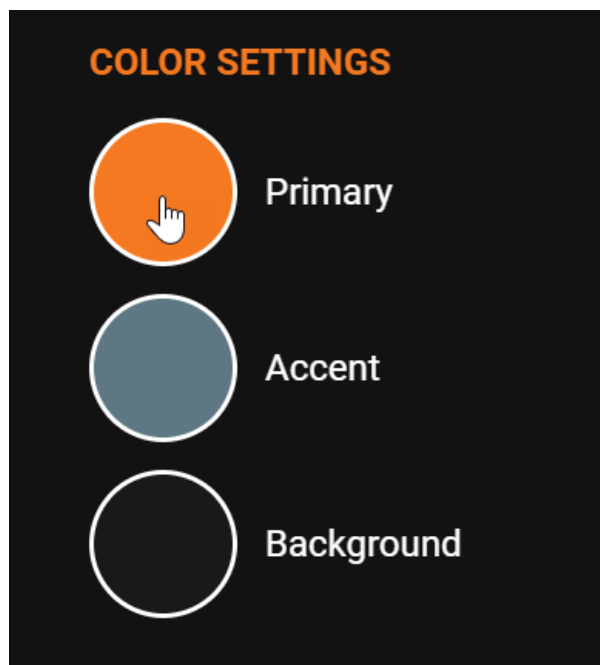
The interface style lets you choose whether you prefer your color settings and interface to be in a light or dark theme for the chat interface. You can toggle between the two to get a better idea of what each setting will look like based on your color settings. This may be one of the last settings you finalize after you have decided on a logo and color settings.



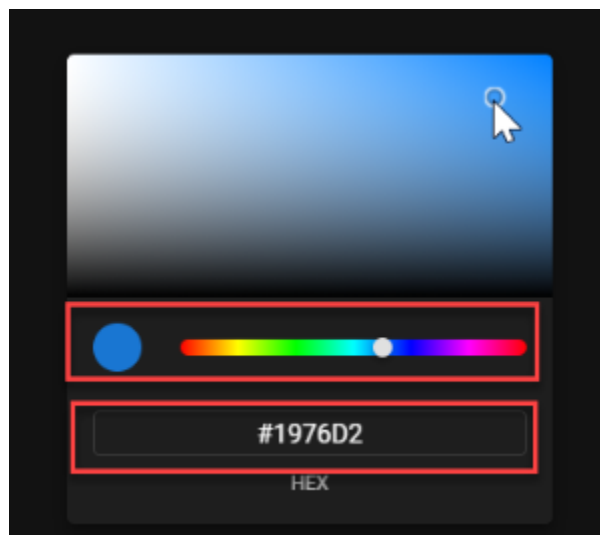
### Color Settings

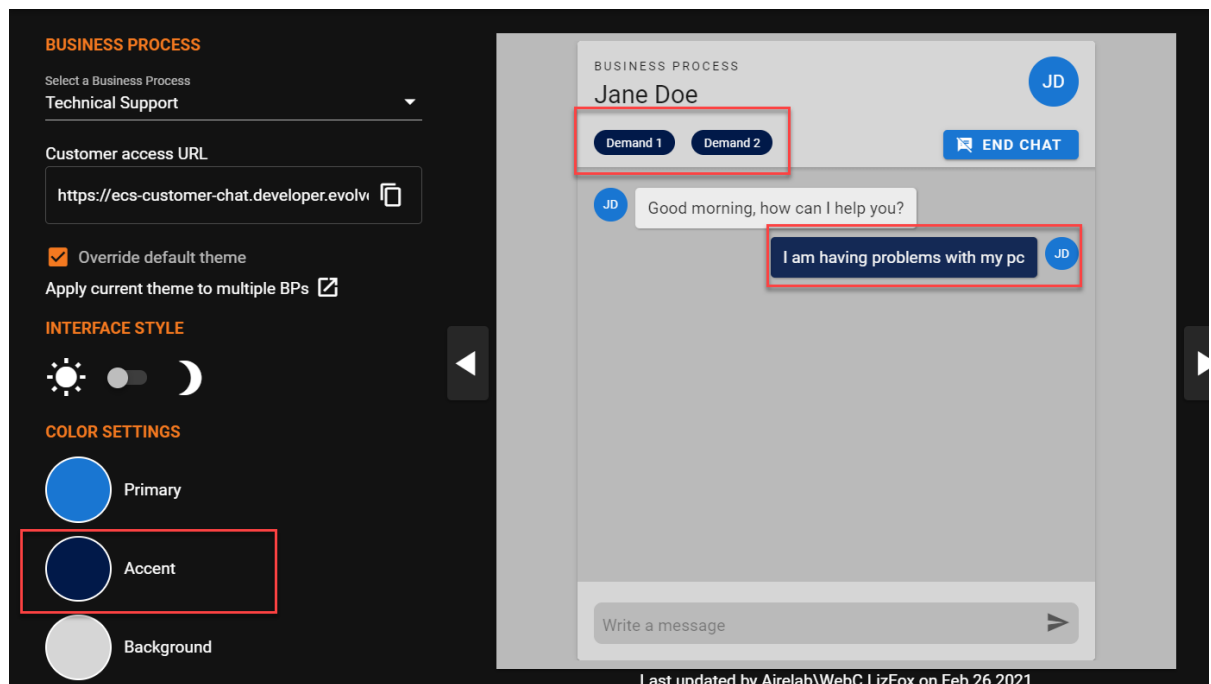
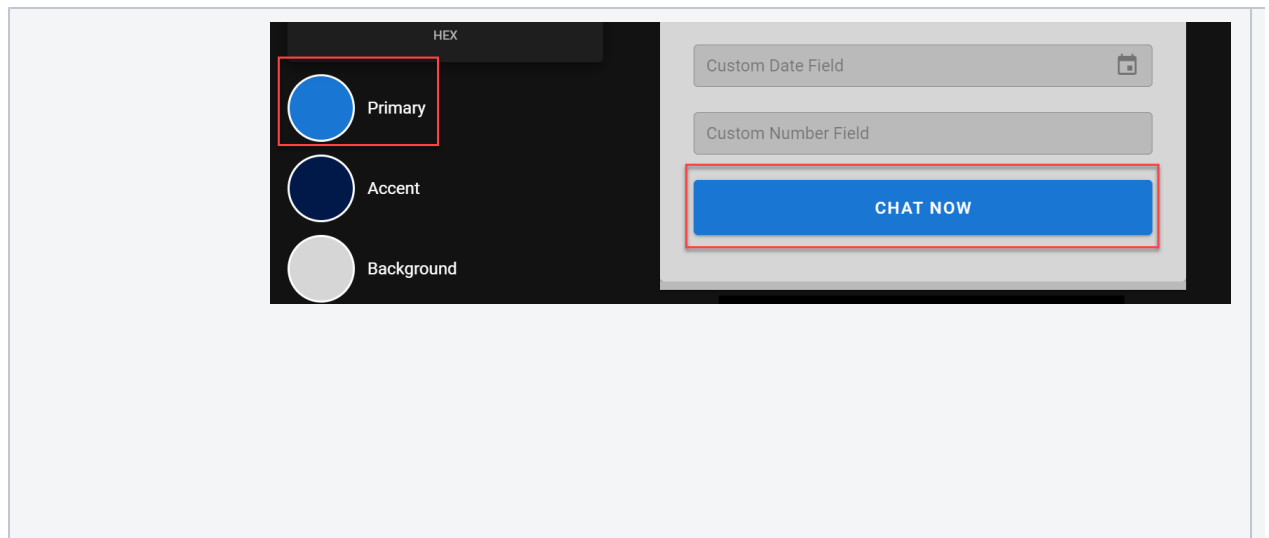
Each color setting, Primary, Accent and Background, can be customized.

1. Select the color palate for each option to customize



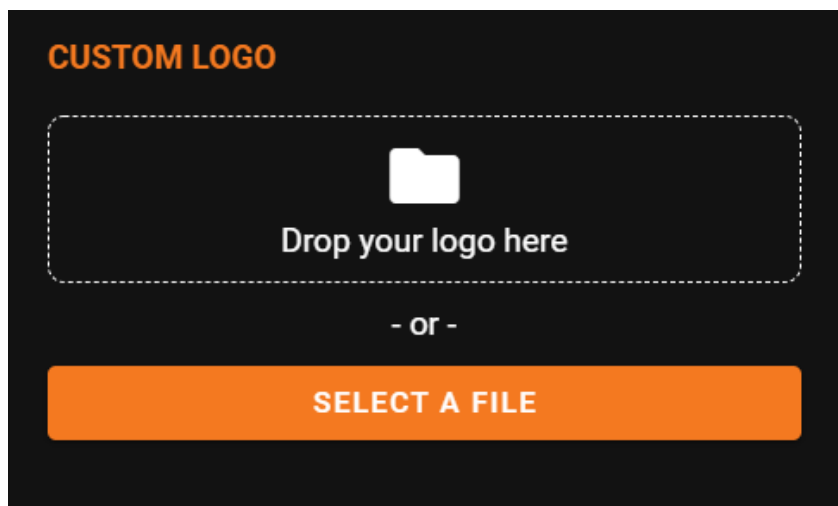
2. Selecting the color will open up a new window to either manually enter in the new color or select from the color bar. When you select a new color your preview template will update to reflect your new color choice.



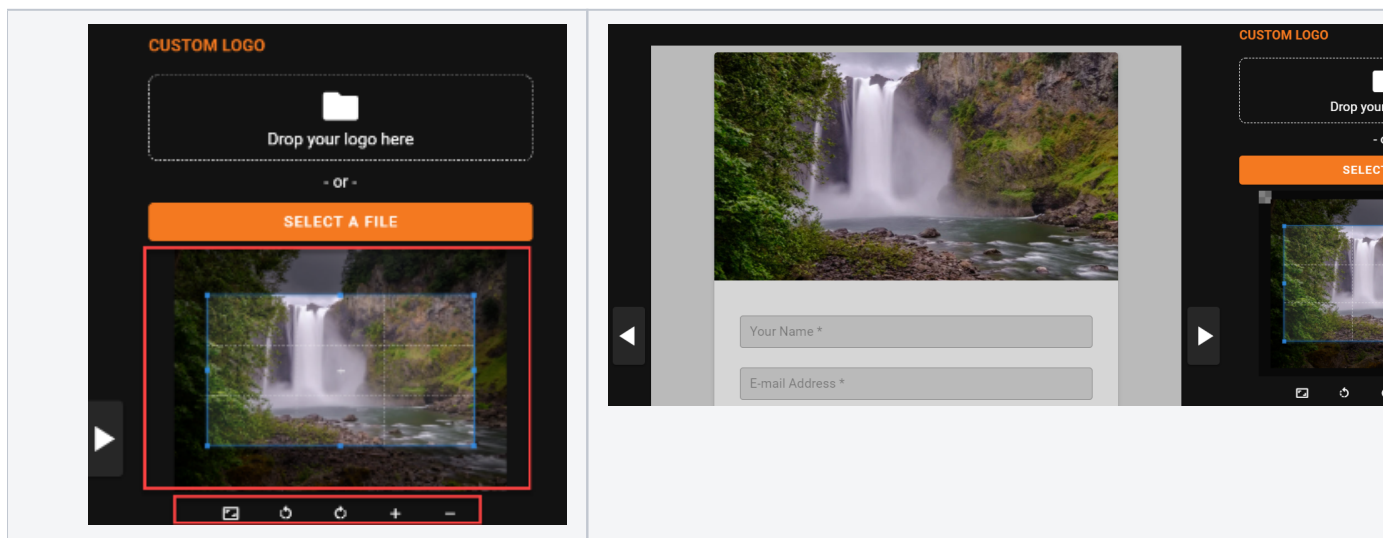


## Custom Logo

1. Add a custom Logo by either dragging in the Logo or selecting a file from your desktop.

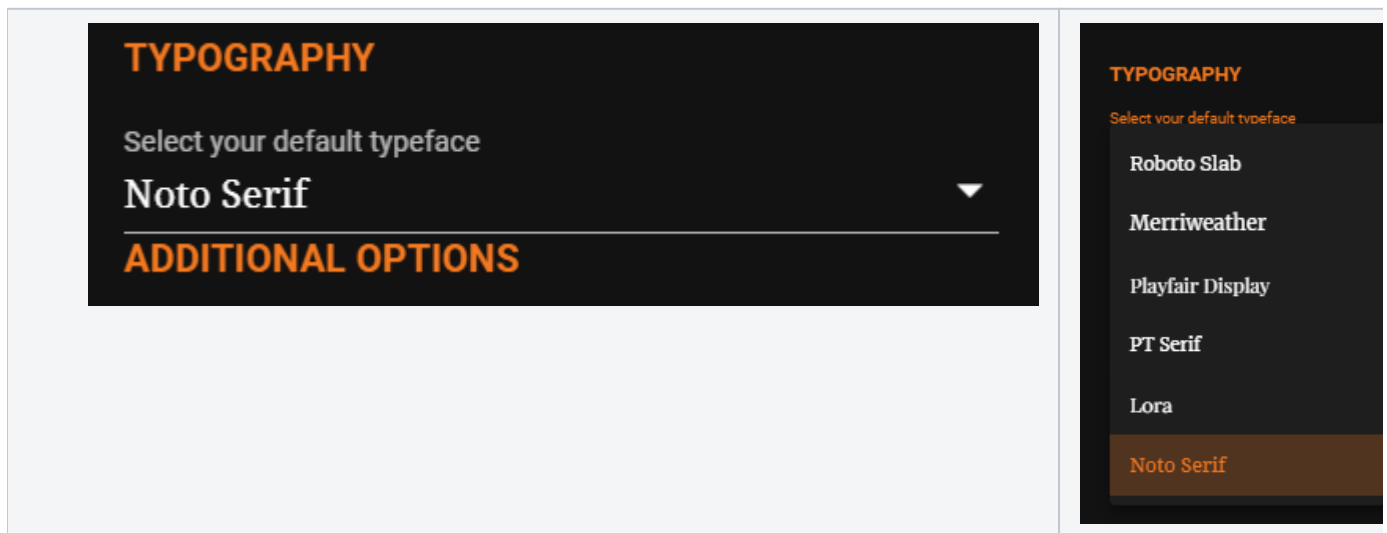


2. Once a logo has been added you will have the ability to modify the position and size of the logo within the logo preview window. As you adjust the logo you will see changes in real time within the Chat Preview pane.



## Typography

From the dropdown select the font you wish to utilize throughout the chat interface. The font will update within the Chat Preview pane as you make your selection.



## Additional Options

Name and Email Address will always be mandatory for a customer to initiate a chat. These fields cannot be removed or edited. However, Date and Number field are optional fields that can be included when deciding on which fields the customer must fill out to initiate a chat.

1. Select to enable or disable the custom date and number field. Both entry labels can be modified to be unique to your entry needs. The fields will update within the Chat Preview pane as you make your changes.

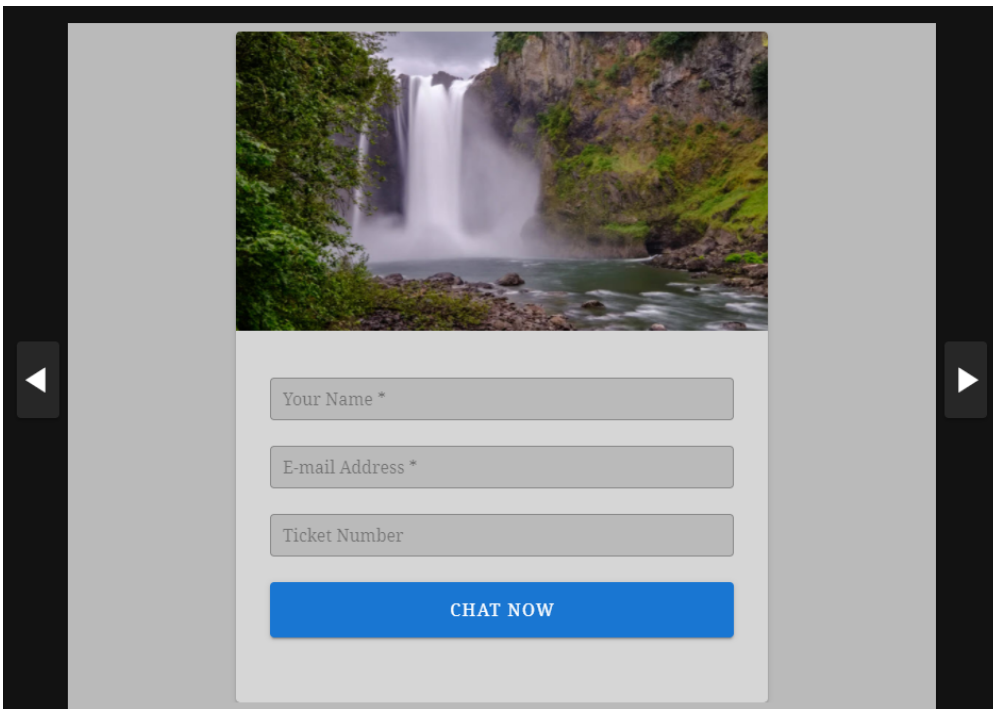
The image shows two side-by-side panels. The left panel, titled 'ADDITIONAL OPTIONS' in orange, has a dark background. It contains two sections: 'Enable custom date field' with an unchecked checkbox and a text input field containing 'Custom Date Field'; and 'Enable custom number field' with a checked checkbox and a text input field containing 'Ticket Number'. The right panel is a preview of the chat initiation screen. It features three input fields: 'Your Name \*', 'E-mail Address \*', and 'Ticket Number' (which is highlighted with a red border). Below these is a blue 'CHAT NOW' button. At the bottom of the preview, it says 'Last updated by Airelab\WebC.LizFox on Mar 01 2021'.

## Preview Pane

Once you have made all your selections, use the arrows within the Preview Pane to get a preview of your changes and what will be shown to your customers when attempting to initiate a chat interaction. *It is important to note that you must utilize the Customer Access URL under the Business Process section mentioned above when you are ready to implement chat.*

The image shows a comprehensive configuration interface for a chat system. At the top, there's a navigation bar with 'SUMMARY', 'BRANDING' (highlighted), 'TEMPLATES', and 'CONTACT MANAGEMENT'. The top right shows 'Airelab\WebC.LizFox' and a user icon. The left sidebar has three main sections: 'BUSINESS PROCESS' with a dropdown for 'Technical Support' and a 'Customer access URL' field; 'INTERFACE STYLE' with a theme selector (light, dark, moon) and a checkbox for 'Override default theme'; and 'COLOR SETTINGS' with three color swatches labeled 'Primary', 'Accent', and 'Background'. The central area is a large preview pane showing a chat initiation screen with a waterfall background image, input fields for 'Your Name \*', 'E-mail Address \*', and 'Ticket Number', and a blue 'CHAT NOW' button. The right sidebar contains 'CUSTOM LOGO' with a 'Drop your logo here' area and a 'SELECT A FILE' button; 'TYPOGRAPHY' with a 'Noto Serif' font selection; and 'ADDITIONAL OPTIONS' with checkboxes for 'Enable custom date field' and 'Enable custom number field', each with a corresponding text input field. At the bottom of the preview pane, it says 'Last updated by Airelab\WebC.LizFox on Mar 01 2021'.

## Initial Chat Initiation Screen



Waterfall image

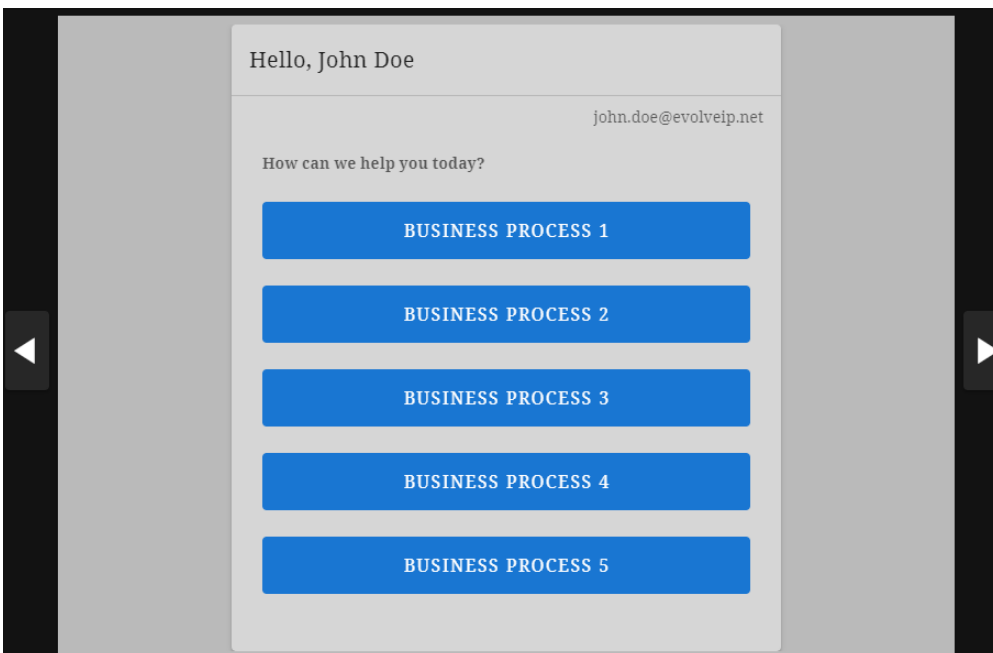
Your Name \*

E-mail Address \*

Ticket Number

CHAT NOW

#### Customer Chat Selections



Hello, John Doe

john.doe@evolveip.net

How can we help you today?

BUSINESS PROCESS 1

BUSINESS PROCESS 2

BUSINESS PROCESS 3

BUSINESS PROCESS 4

BUSINESS PROCESS 5

#### Chat Window



