

The Best Free live Chat and Help Desk Software

I've been using Zopim Live chat for a little over 3 months now to help me pull in more qualified web design leads.

I had dabbled with other helpdesk and live chat providers, but a lack of support for mobile and older browsers meant that my search continued.

Zopim makes it easy to engage with visitors live on your website, answer their questions and turn those virtual window shoppers into paying customers.

Since going live with [Zopim Live Chat](#) on my website I've more than doubled the amount of leads I receive and convert each month, in this article I'll explain how you can too.

What you will learn

- How to build meaningful relationships with live visitors to your website
- How to customise the Zopim Widget
- How to set up customised greetings and alerts
- How to set up and manage a team of live chat agents
- How to configure Zopim with your own IM software
- How to combat spam

- How to increase leads and business profitability using Zopim

Zopim live Chat Review and Tutorial

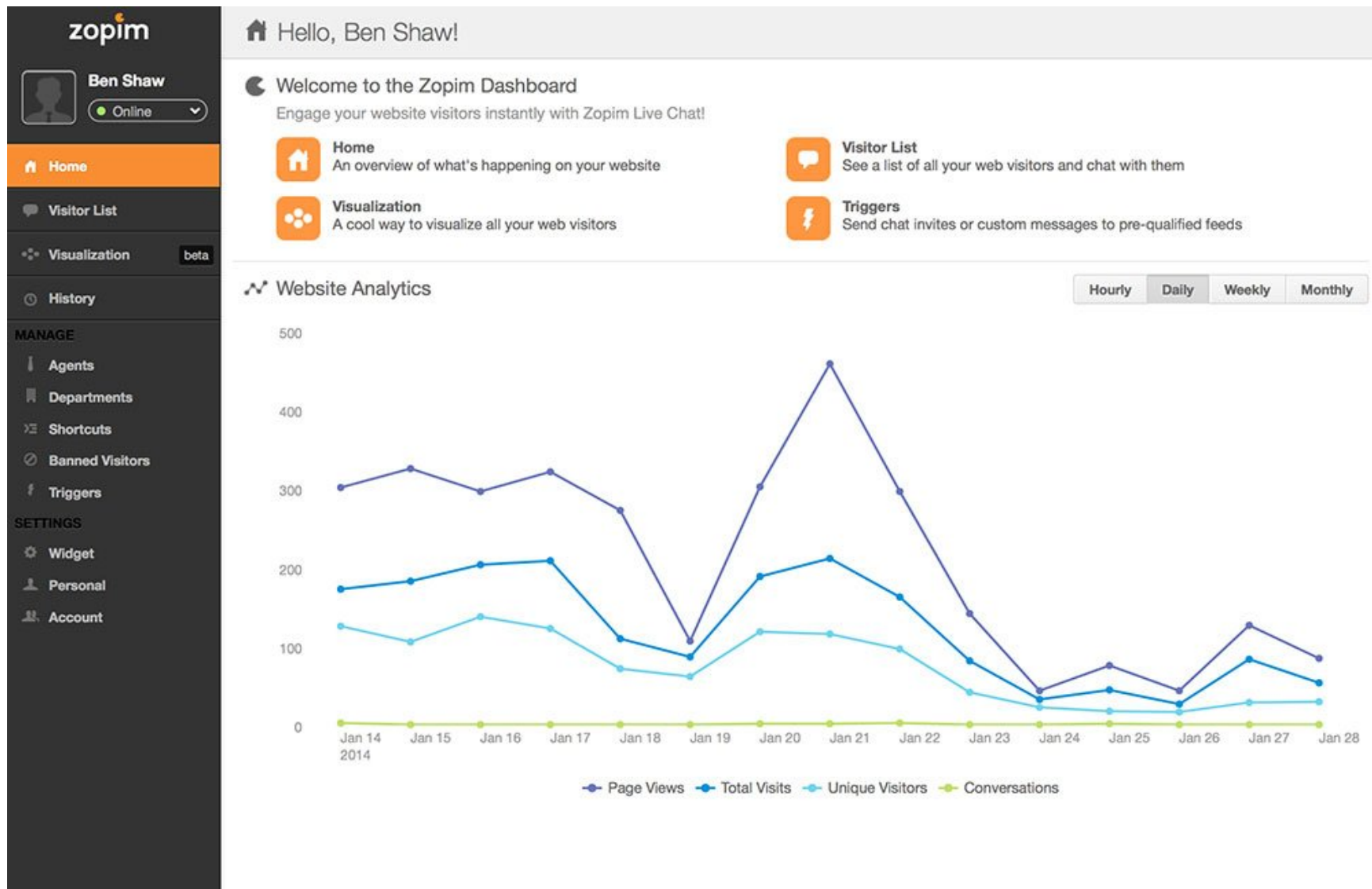
This article will teach you how to set up and configure Zopim Live Chat, and optimise your workflow to generate more leads and build more meaningful relationships with potential clients.

Zopim Live Chat is a tool which sits live on your website, and allows you or your agents to initiate live discussions with visitors as they browse your products or services.

Zopim is available to any business, large or small – run it yourself or set up a help desk and departments to categorise your agents and get the right help for your website visitors.

A beautiful user interface

Zopim Chat administration is split between two areas: My Account and the Dashboard. My Account is where you deal with your billing and subscription settings and the Dashboard is where you'll spend most of your time.



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The dashboard is the first thing you'll see after logging in, and gives you some summarised analytics of your website traffic during recent hours, days or months. The graph shows total visitors, uniques and the number of chats held.

You can also view what's happening right now by clicking the visitors list tab. From here you can instigate a real time live chat with any of the visitors live on your site.

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Ben Shaw
Online

Home

Visitor List

Visualization beta

History

MANAGE

- Agents
- Departments
- Shortcuts
- Banned Visitors
- Triggers

SETTINGS

- Widget
- Personal
- Account

Visitors on Your Website Total Visitors: 4

Group by Activity

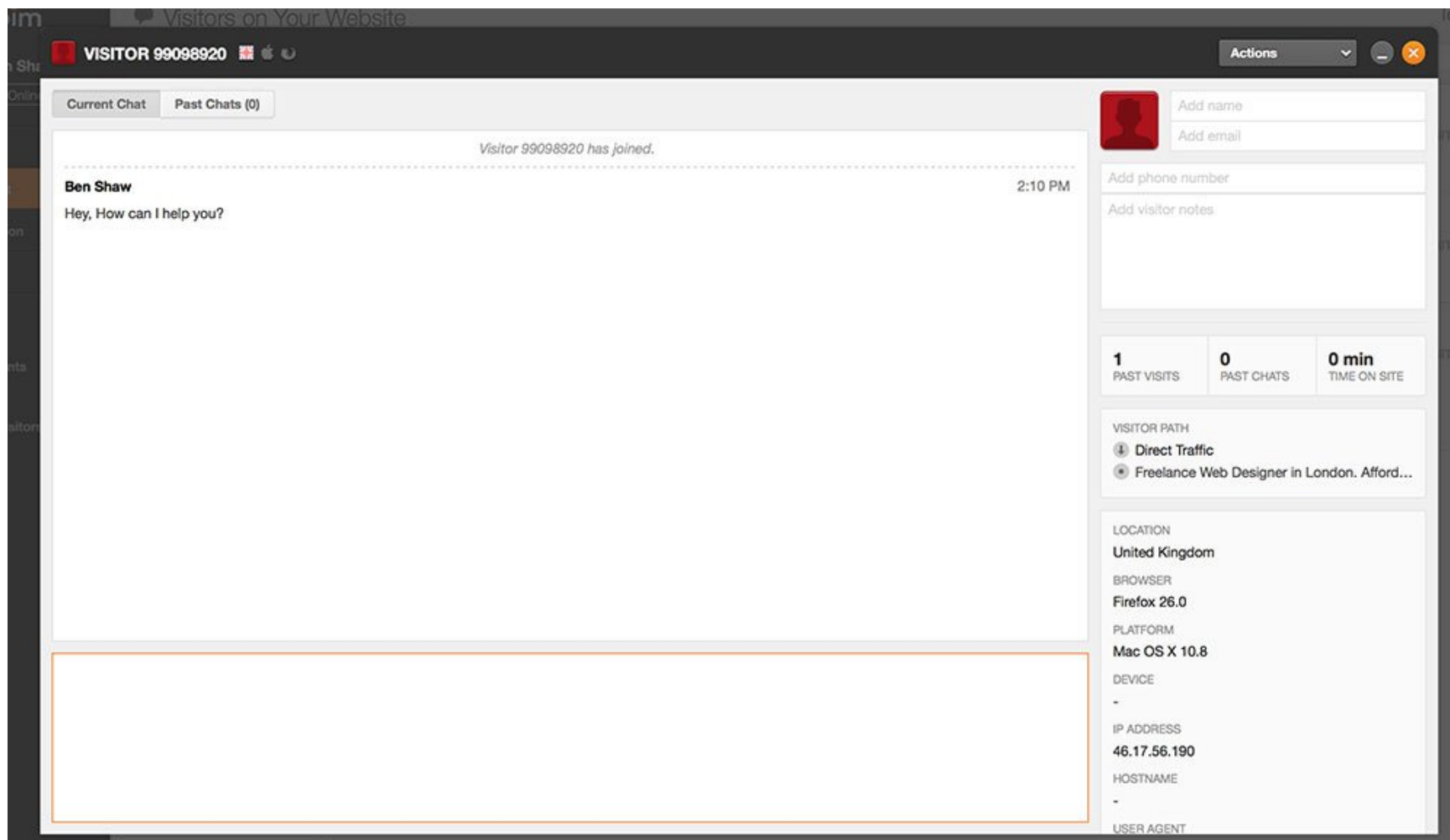
Active Visitors Visitors: 1

#	VISITOR	ONLINE	VIEWING	REFERRER	# VISITS	# CHATS
#60923207		2 min	1 The Best Classified Ads WordPress Themes	google.com	26	-

Idle Visitors Visitors: 3

#	VISITOR	ONLINE	VIEWING	REFERRER	# VISITS	# CHATS
#69659346		24 min	1 The Best Classified Ads WordPress Themes	boshanka.co.uk/web-d...	4	-
#46162825		22 min	1 Web Design Portfolio - A showcase of stunning websites from Boshanka!	-	3	-
#96854087		18 min	2 Lissauer Dental - Boshanka	-	4	-

Simply click on a visitor to start a chat.

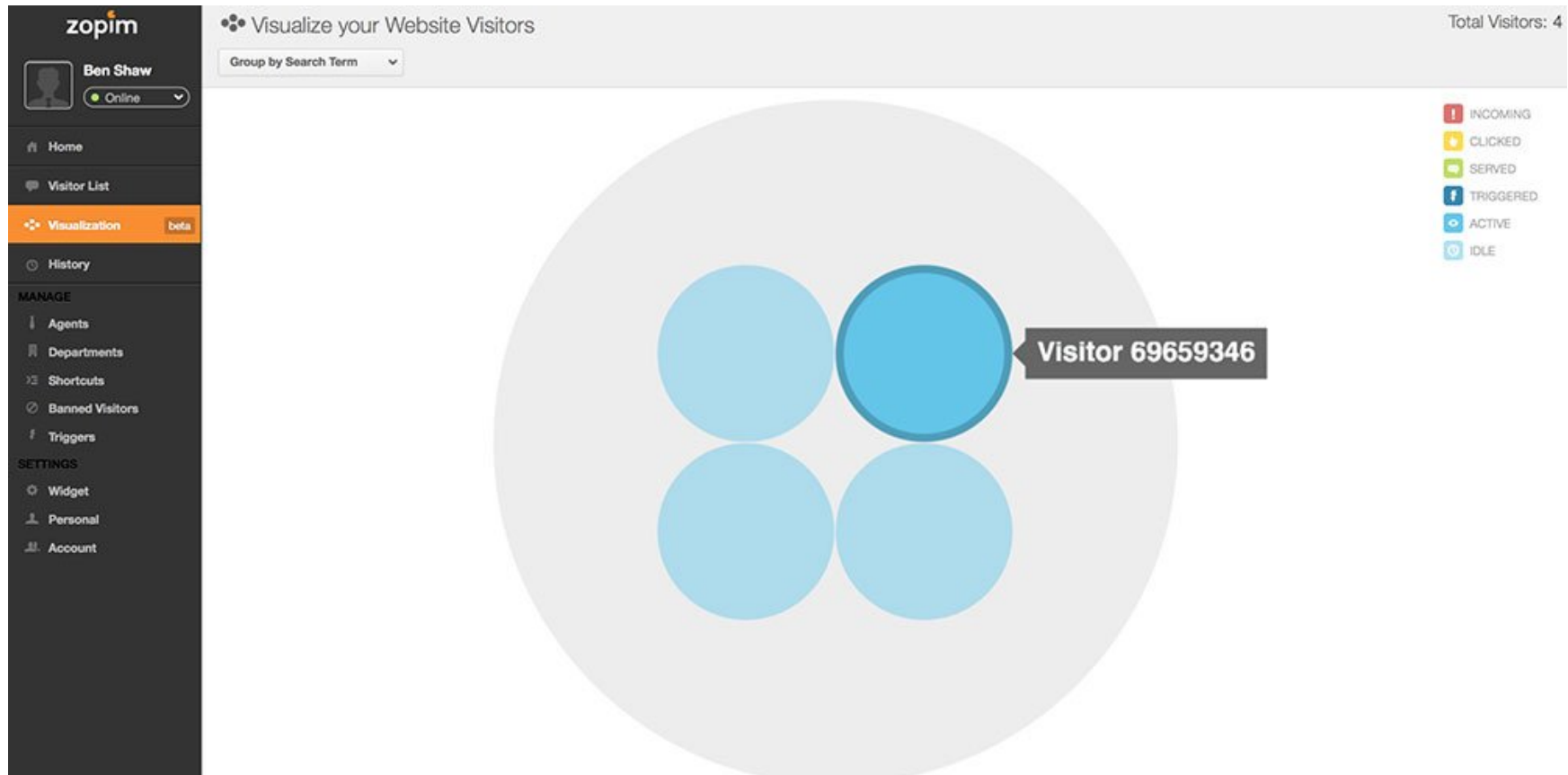


Your visitor will see your message appear in real time on the front end of your website.

The image shows a screenshot of the Boshanka website. The background is a dark wood texture with sewing-related items like buttons, a measuring tape, and a spool of thread. The Boshanka logo is at the top left, with the tagline 'Freelance Web Design - Est 2006 - London, England'. A phone number '+44 (0) 7870862645' is prominently displayed in the top right. A navigation menu includes Home, Web Design & SEO, Portfolio, Web Design Blog, Video Production, About Me, Contact Me, and Shop. The main content area features the heading 'Tailored Web Design' and a sub-heading 'From a Freelance Web Designer in London.' Below this is a paragraph: 'I make beautiful tailored websites for the engaged and the driven. For people and businesses who understand their users and want to provide them with the best possible experience.' A call to action says 'Sound like you? Give me a call on 07870862645'. Two links are provided: 'Send me a Message' and 'Try the Web Design Cost Estimator'. A live chat widget is overlaid on the right side, showing a chat window with the name 'Ben Shaw' and the role 'Customer support'. The chat message says 'Hey, How can I help you?' and there is a text input field for the user's response.

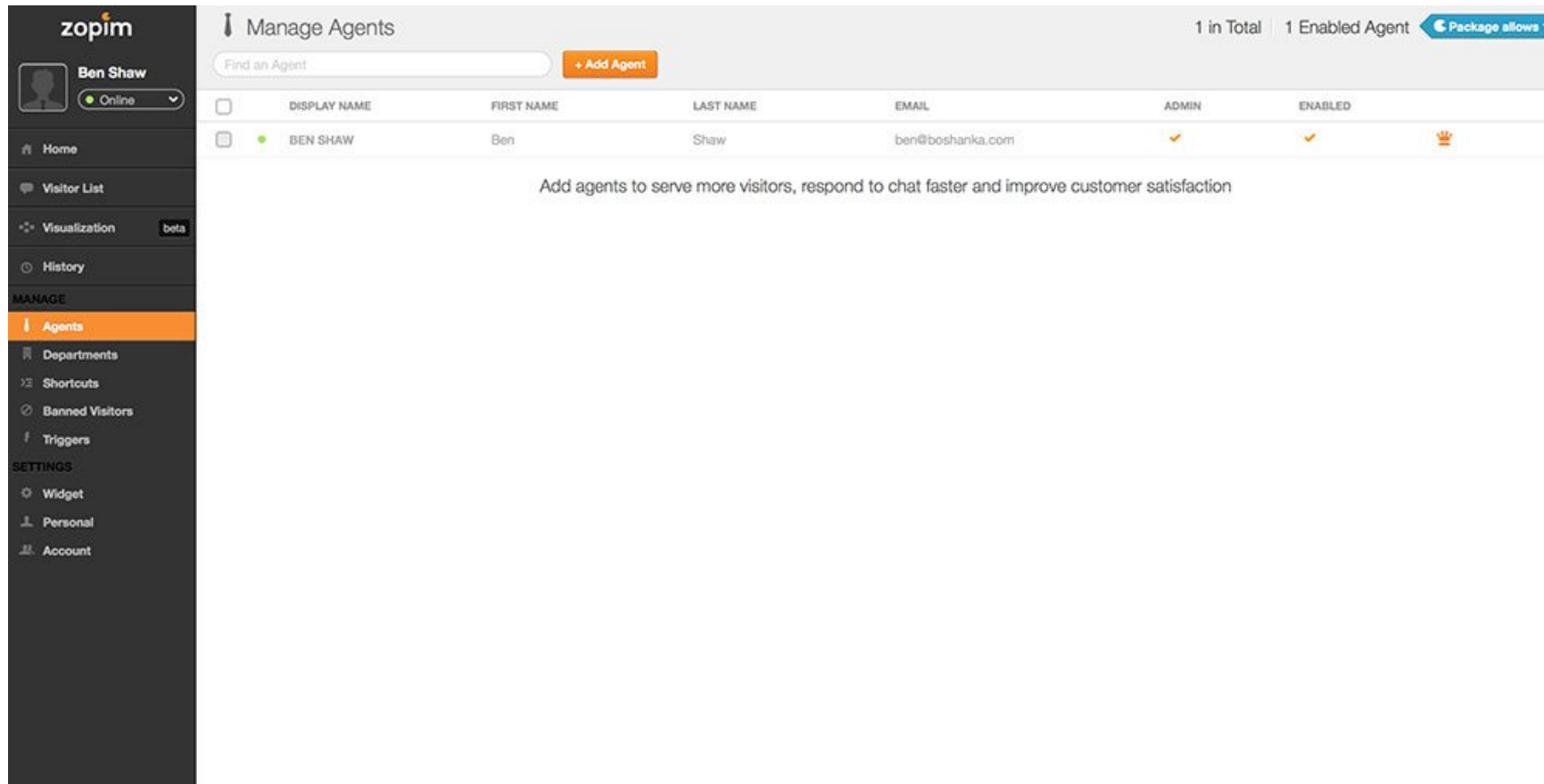
Visualisation Buckets

One of the coolest features offered by Zopim is the visualisation section. Here you can see a real time visualisation of visitors on your site, you can then segment them into helpful buckets such as browser type, keyword, page title, country, browser and lots more.



You can interact and initiate chats with the visitors directly from within this screen, as well as see any incoming chat notifications.

With Zopim's Free live chat you can run one live chat at a time, but the premium packages offer unlimited simultaneous chats.



The agent management section is again limited to one on the free version, but with the premium version you can delegate tasks and create multiple agents who can all access the dashboard to deal with customers independently of each other.

As the account holder you can silently shadow live chats as they happen without the agent or the customer knowing, very handy for quality control.

To maximise efficiency, you'll want to set up plenty of shortcuts, these are automatically applied to chats when the a short cut is entered into the widget. You can also create multiple choice questions, to engage the user without requiring them to type anything.

The screenshot displays the Zopim Shortcuts interface. On the left, a dark sidebar contains the Zopim logo, user profile for Ben Shaw (Online), and navigation menu items: Home, Visitor List, Visualization (beta), History, MANAGE (Agents, Departments, Shortcuts, Banned Visitors, Triggers), and SETTINGS (Widget, Personal, Account). The 'Shortcuts' menu item is highlighted in orange. The main content area is titled 'Shortcuts' and features a search bar 'Find a Shortcut' and a '+ Add Shortcuts' button. Below this, there are three shortcut entries, each with a checkbox, a label, and a message:

<input type="checkbox"/>	SHORTCUT	MESSAGE
<input type="checkbox"/>	HELP	do you need any help? <input type="radio"/> Yes <input type="radio"/> No
<input type="checkbox"/>	HI	Hi, how can we help you today? =)

At the bottom of the main area, a note states: 'Shortcuts allowed you to quickly respond with standard phrases'.

As you might expect, you can easily ban problem visitors by IP address, ensuring you quickly weed out any time wasters.

Proactive Lead Generation

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In my experience, this is the most valuable section. By setting up proactive triggers, Zopim will automatically pop up and initiate a chat with users. You create the message to be displayed and set up the action that will trigger it.

A trigger action can be almost anything, time on page, 2nd, 3rd visit to the page, hitting a specific page like a basket or a product, or even something more complex.

Zopim is an attractive widget that will encourage users to contact you where they perhaps wouldn't have before, but add the awesome power of proactive triggers and you will dramatically increase your leads, overnight.

Triggers are a premium feature, but with [premium plans for Zopim](#) starting at \$14.00 / month – its an option you can't afford to live without.

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 **Ben Shaw**
Online

- Home
- Visitor List
- Visualization beta
- History

MANAGE

- Agents
- Departments
- Shortcuts
- Banned Visitors
- Triggers**

SETTINGS

- Widget
- Personal
- Account

← Edit Trigger

Trigger Status Enabled Disabled
0 of 0 Triggers used. [Upgrade now](#) to increase the feature limit.

Trigger Name

Description

Fire only once per visitor Each visitor will receive this message only once

Customize Trigger Visual Developer

Run trigger

Check conditions

− +

Number of seconds visitor has stayed on your site

Perform the following actions

− +

Save Changes Cancel

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The Trigger shown above will automatically respond the user if they start a chat but no one is around to answer them. It'll ask them to wait or give them my contact details, or better yet ask them to leave theirs.

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Edit Trigger

Trigger Status: **Enabled** Disabled

0 of 0 Triggers used. [Upgrade now](#) to increase the feature limit.

Trigger Name: Chat Rescuer

Description: Auto respond to messages if agents don't respond in time.

Fire only once per visitor: Each visitor will receive this message only once

Customize Trigger: **Visual** Developer

Run trigger: When a visitor requests a chat

Check conditions: Check all of the following conditions

- Account Status: Not Equal offline
Status of your account (online / away / offline)
- Still on site: 60
Delay (in secs) before checking next condition
- Visitor served: Is false
'true' if visitor is currently served by agents

The time on site trigger I have set up just pops up when a user has been on my site for 30 seconds.

Integrating Zopim Chat into your website

It's pretty simple, just copy the script from the widget section in your dashboard into your website header. It's also worth noting here that if you're using Zopim with Cloudflare and you have your scripts set to load with rocketscript – Zopim may not work. Not a problem though just modify the first line of the Zopim js code to include `data-cfasync="false"`. An example is shown below:

```
1 <script data-cfasync="false" type="text/javascript">
```

You can also customise the widget's look and feel to match your site. Again, premium account holders win here with lots of features and added benefits such as social login etc. But basic customisation is possible with Zopim Free.

Widget Customization

Getting Started | Appearance | Forms | Settings Switch to Classic Widget Editor

Restricted Feature Preview Full Customization

Some customizations are unavailable for your package. Try the full customization preview before [upgrading your account](#).

1. Chat Window

Simple **Classic**

Top Title:





Theme Color:

Window Size: Small Medium Large

Widget Position: Bottom Left Bottom Right

2. Chat Badge

On Off



Preview

Online: Chat Window

Live Chat

Freelance Web Designer
Ask me anything

Chat started

Jane
Hi there, I'm looking for green and pink shirts.

John Doe joined the chat

John Doe
Hi Jane, welcome to our store!
We have green shirts in all sizes.
Unfortunately, we're out of pink shirts at the moment.

Jane
I see. Thanks for the clarification!

John Doe

Options · Hi, Jane zopim

Software and Application Integration

- Jira
- Salesforce
- Highrise
- SugarCRM
- Vtiger
- ZohoCRM
- Batchbook
- Pivotal Tracker
- OsTicket
- ZenDesk
- NetSuite
- UserVoice
- WordPress

Resources in this Article

- [Zopim Live Chat](#)