Client Portal Guide

Contents

Client Portal Services

The Client Portal assists you with various Linc operational tasks, such as:

- Adding and deleting users
- Giving users permissions to perform operational tasks
- Analyzing usage data in the BI dashboard
- Adding and updating Q&A Knowledge Base entries
- Managing billing

The Client Portal supports the following browsers:

- MacOS 11 ("Big Sur"): Safari 14, Chrome 90
- MacOS 10 ("Catalina"): Safari 13.1
- Win10 (edge90, edge89, Firefox88, Firefox87, chrome90, chrome89, opra76, opra75)

The following pages provide instructions for you to perform various activities in the Client Portal.

- Manage Users in the Client Portal
- Update Q&As using the Knowledge Base Curator
- Analyze User Engagement with the BI Dashboard
- Manage your Ad Campaigns

Manage Users in the Client Portal

- Introduction
- User management page in the Client Portal
- Tips for managing user accounts
- Roles
- Access rights available in the popup
- Access rights for user management

Introduction

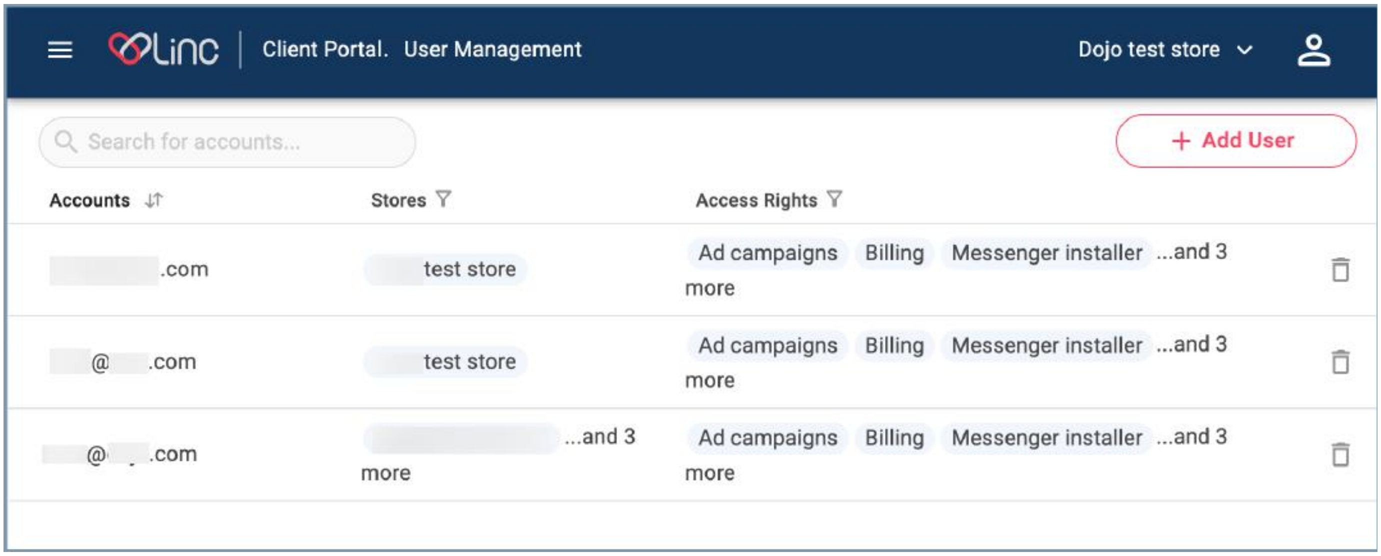
From the Client Portal User Management page, a Linc System Administrator can assign a Client Administrator, a person on your team, to manage other users from your team. A Client Administrator can add or remove user accounts, and grant or revoke access rights to specific services.

Access the Client Portal from these URLs:

- Staging: https://portal.staging.letslinc.com/
- Production: https://portal.letslinc.com/

User management page in the Client Portal

In the Client Portal, administrators manage users in the Account management > User management page.

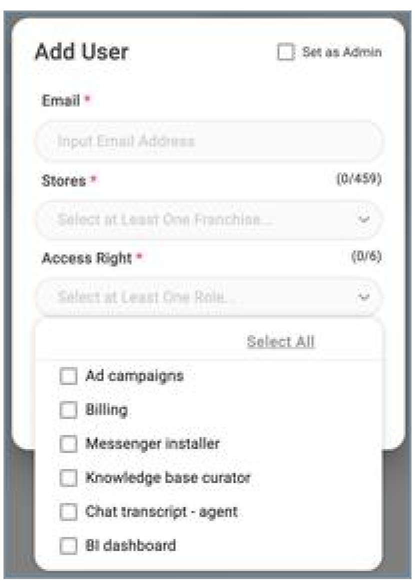


The User Management page shows a user account per row, what franchise stores they can access, and what access rights they have.

Tips for managing user accounts

- To add a user, click Add User and fill out the popup form.
- To edit a user’s privileges, double-click on the user’s row. The Edit User popup opens.
- To give a user administrator privileges, check *Set as Admin*.

> The Linc Team recommends that administrators adopt the **principle of least privilege** when creating new users. Only grant each user access to services that are essential for that user's roles and responsibilities.



- What access rights appear in the pulldown depend upon your user role as either System Administrator or Client Administrator. (In the example above, the screenshot is from a System Administrator, and the Chat transcript access right can only be assigned by a System Administrator.)

> *Important*: When you change a user's rights, have them log out and log in again.

Roles

User roles in the Linc system are:

- **Linc System Administrator**: Linc employee who manages the Client Portal.
- **Client Administrator**: Your company's assigned administrator. When you first start working with Linc, a Linc System Administrator will set up your Client Administrator. They can add or remove user accounts, and grant or revoke access rights to specific services. Some services are internal to Linc and require a System Administrator; these services are not visible to a Client Administrator.
- **Regular user**: Your company's user, who may be given permission to access specific services.

Access rights available in the popup

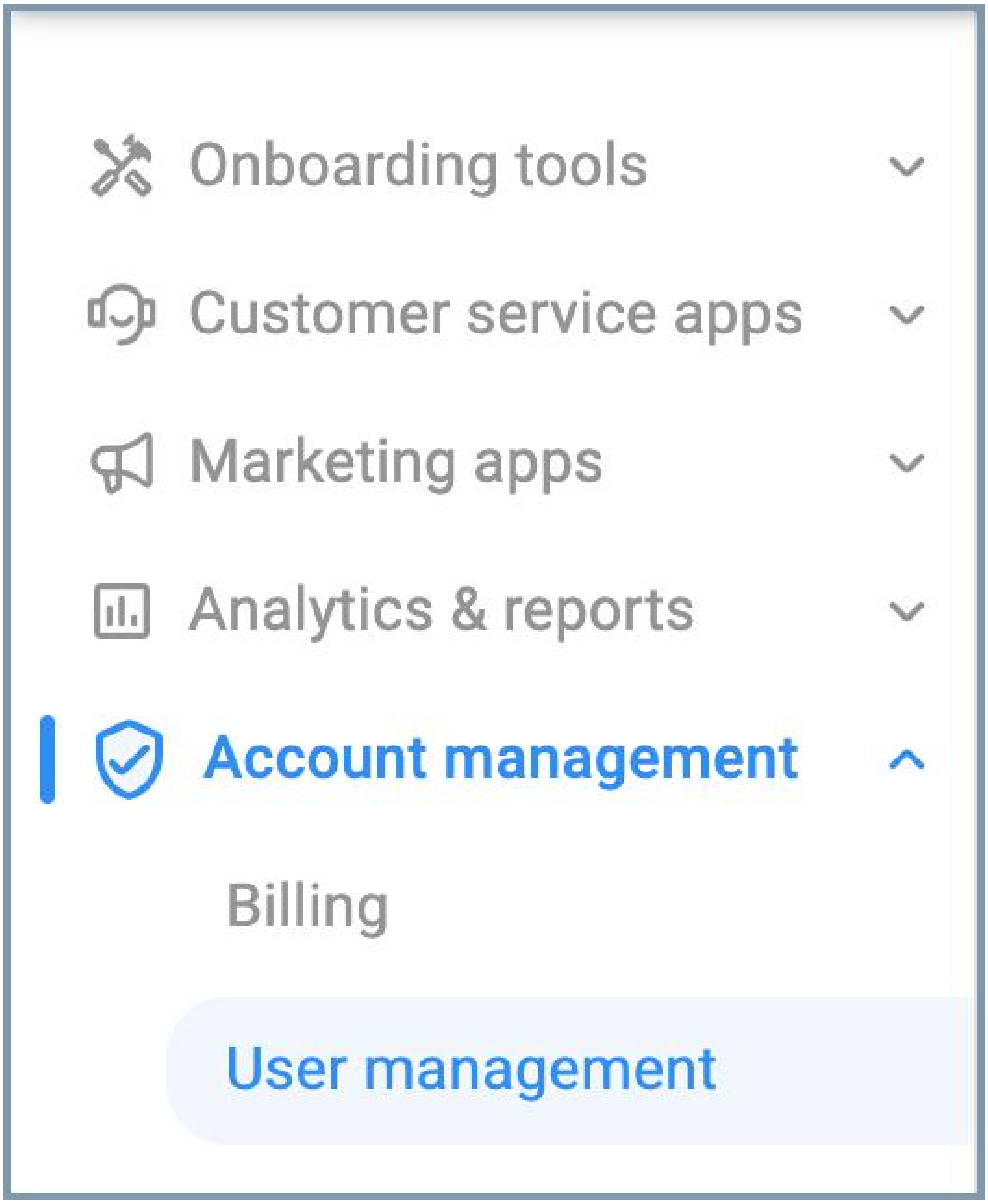
The table below describes the privileges entrusted to a user when granted access to a particular service. The table lists only the rights that can be administered by a Client Administrator.

Menu Category	Access Right	Description
Onboarding tools	Messenger installer	Permits a user to install Linc applications on your company's Facebook pages.
Customer Service apps	Knowledge Base Curator	Permits a user to edit your Q&A content and publish it to your production sites.
Marketing apps	Ad campaigns	Permits a user to edit campaign content and publish the content onto your production sites.
Analytics & reports	BI Dashboard	Permits a user to read operational and business analytics information, derived from Linc's services, in the BI Dashboard.
Account management	Billing	Grants a user read and write access to your corporate payment and credit card details.

Access rights for user management

To be able to read and modify the permissions of user accounts, you need Client Administrator rights. Your Linc System Administrator or other Client Administrator can create or edit a user and then, in the popup, click *Set as Admin*.

When you have Client Administrator privileges, you see the User management menu item.



If a newly-enabled administrator doesn't see this in the menu, ask them to log out and log in again.

Update Q&As using the Knowledge Base Curator

Introduction

While conversing with customers, Linc Digital Workers answer customer questions.

The Digital Workers leverage Linc's Conversational AI and Service Engine layers to infer customer intent, based on what they type (their utterance), and to answer customer questions with relevant, contextual answers. Some of the answers leverage the data feeds, such as when questions about a product can be answered using the product catalog feed. Other questions are related to policies and processes, with relatively static answers. In those cases Linc references predefined Q&A pairs.

Linc maintains a list of question-and-answer (Q&A) pairs that are typical for your customer use cases. You may want to tailor some of these answers to better reflect your brand, and even add new Q&A pairs, in the Knowledge Base Curator section of the Client Portal.

Another benefit of Linc is that you can see analytic information about the Q&A pairs that shows what exactly they typed and whether your customers found the answers helpful or not. This aids in tuning your Q&A pairs and helps improve Conversational AI performance.

Prerequisites

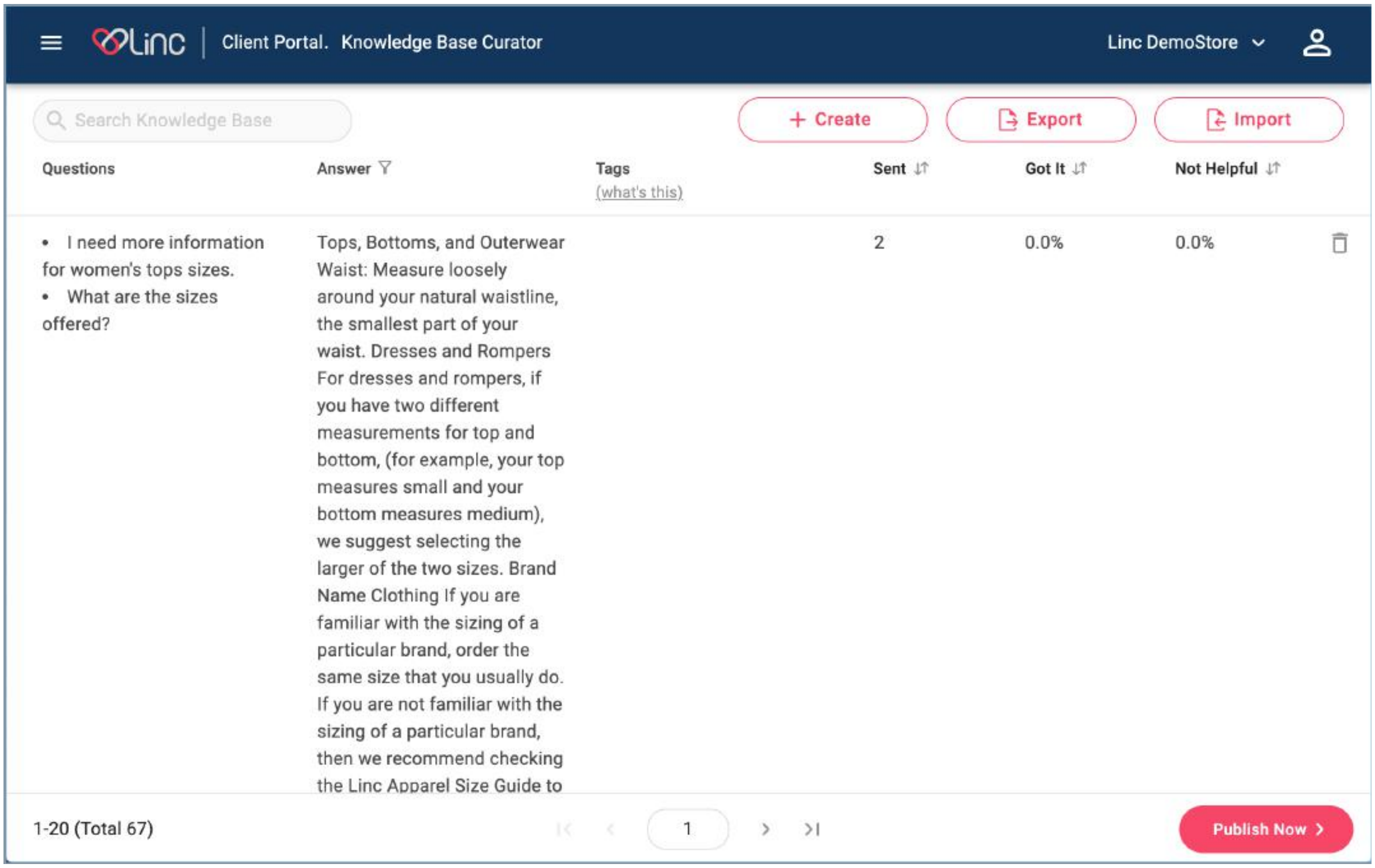
Before you can customize your Q&As, the following needs to happen:

- [ ] Your Customer Success Engineer sets up the necessary internal configurations.
- [ ] Obtain a login to the Client Portal from your Customer Success Implementation Manager.

Access the Knowledge Base Curator

1. Go to the Client Portal:
    - Staging: https://portal.staging.letslinc.com/
    - Production: https://portal.letslinc.com/
2. From the left menu, select *Customer service apps > Knowledge base curator*.

The Curator opens, showing your list of customized questions and answers.



About Tags

Tags are a feature for assigning Q&A pairs to a particular user persona or other type of category. You cannot edit them directly. If you expect to support multiple personas that may need different answers to the same questions, work with your Customer Success Engineer to set them up.

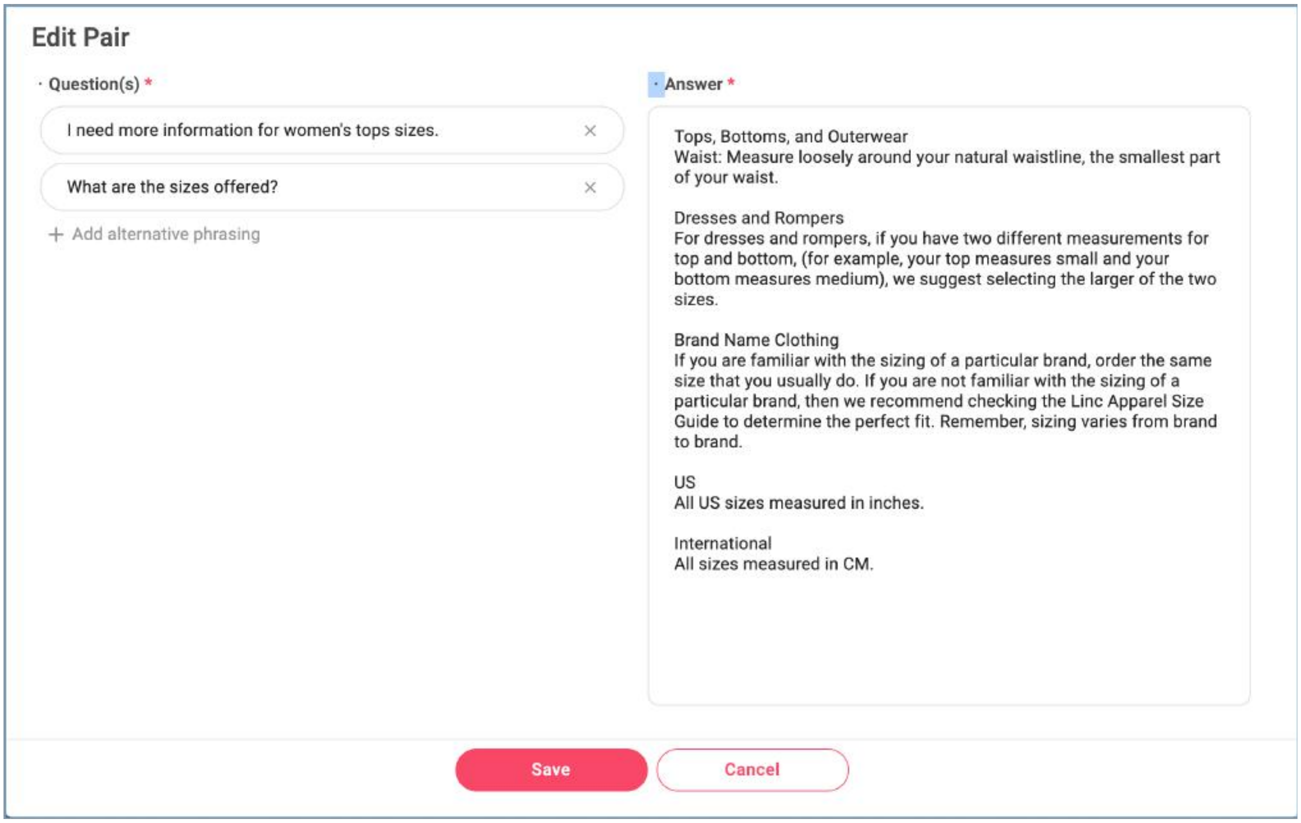
Update Q&As

You can add or update Q&A pairs individually, or use the export/import functionality to edit your Q&As in a comma-separated-values (.csv) editor such as Excel or Google Sheets.

> When you finish editing the pairs, don’t forget to click *Publish Now* at the bottom right of the page.

Edit existing Q&A pairs

1. Double-click on a row to pop up the Edit Pair window.
2. Change the text as you prefer.
3. Click *Add alternative phrasing* for questions that will always have the same answer.



4. Click Save.
5. When you've finished all your changes, click *Publish Now*.

Add a Q&A pair

1. At the top of the page, click Create.
   The Create Pair popup opens.
2. Enter the texts you prefer.
3. Click Create.
4. When you've finished all your changes, click *Publish Now*.

Export and import your Q&A list

If you have multiple people writing or editing your Q&As, it may be helpful to use a tool such as Google Sheets or Microsoft Excel.

1. Click *Export* to download a .csv file of the Q&A pairs.
2. Edit the file.
3. Click *Import* to read the file back into the Curator.
4. When you've finished all your changes, click *Publish Now*.

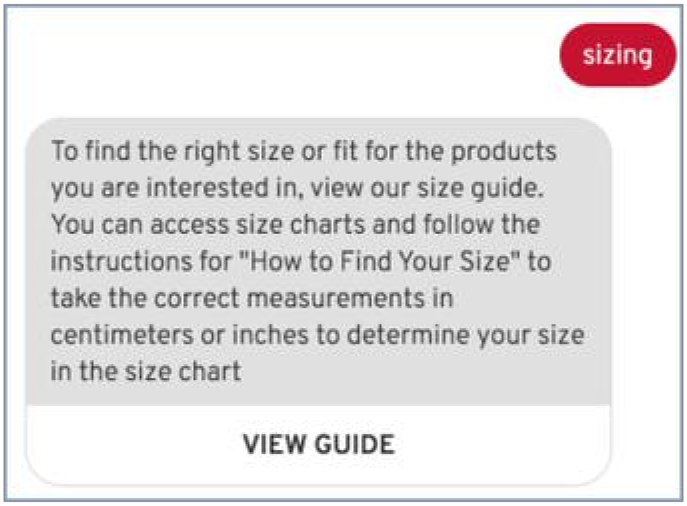
Explore Q&A analytics

Linc captures analytics to help you understand whether your Q&A pairs are helping your customers. For each pair, the columns on the right show the total number of answered questions (Sent), and a percentage of "Got it" versus "Not Helpful" clicks. (This doesn't add up to 100% because some customers won't click on those options.)

Click on a percentage number to see the original customer question.

Add or update Q&A buttons

In Webchat a Q&A answer can include one or more buttons, like the one that says “VIEW GUIDE” in the example below.



You can add multiple buttons by having one or more multiple title/URL pairs.

You can adjust the markup codes by looking for the character string “[{“ and change the `title` and `url` values.

Single button

```
{
  "markup": {
    "urls": [
      {
        "title": "Button",
        "url": "https://brand.com/link "
      }
    ]
  }
}
```

Multiple buttons

```
{
  "markup": {
    "urls": [
      {
```



```
          "title": "Button 1",
          "url": "https://brand.com/link1 "
        },
        {
          "title": "Button 2",
          "url": "https://brand.com/link2 "
        }
      ]
    }
  }
```

For example:

`{"markup":{"urls":[{"title":"Sales Page","url":"https://www.brand.com/sale/"}]}}`

Analyze User Engagement with the BI Dashboard

- BI Dashboard in the Client Portal
- Tips for using the BI Dashboard
- Changelog

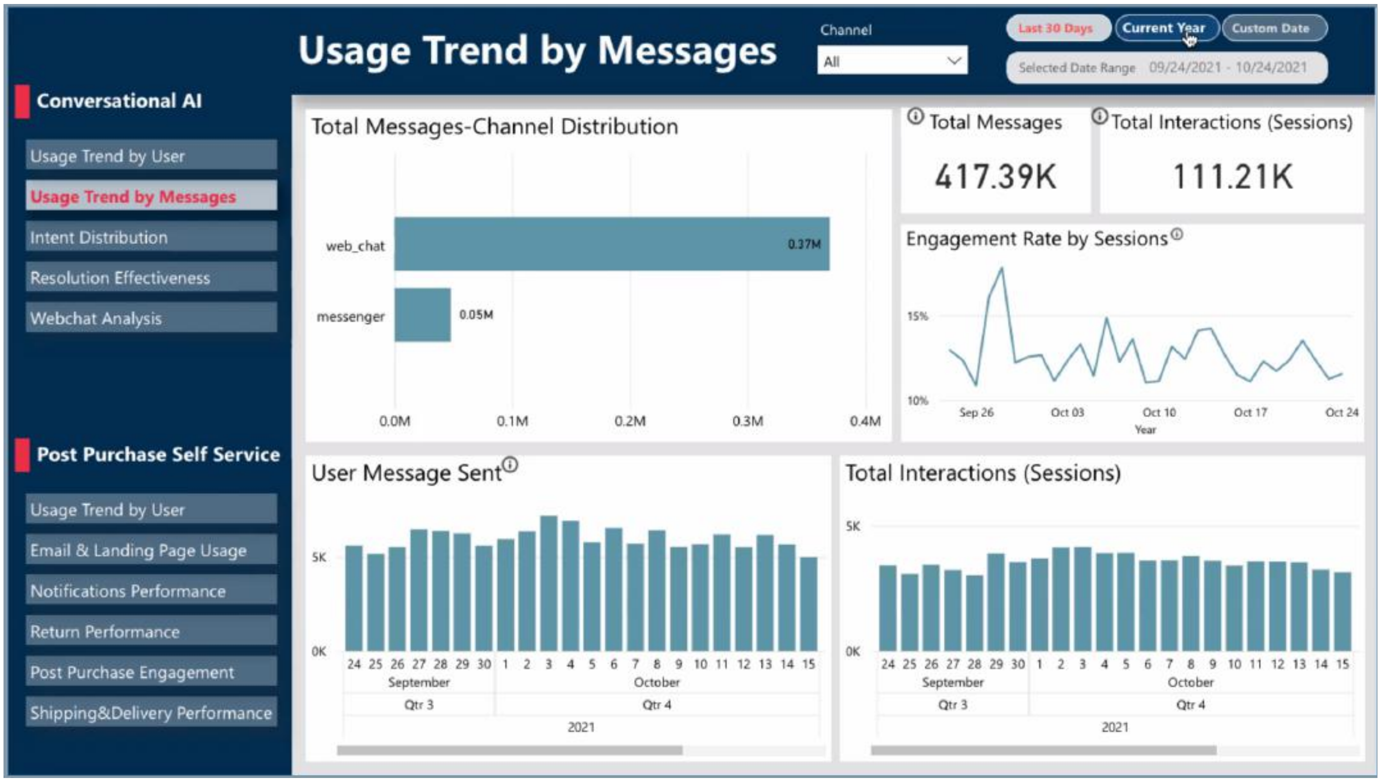
> *Tip*: An updated version of the BI Dashboard released in late October, 2021. See the Changelog below for details.

The Client Portal hosts the BI Dashboard for your brand's business intelligence data and visualizations. It provides insights into your customer's engagement across the Linc platform.

BI Dashboard in the Client Portal

To access the BI Dashboard, in the Client Portal menu select *Analytics & reports* > *BI dashboard*.

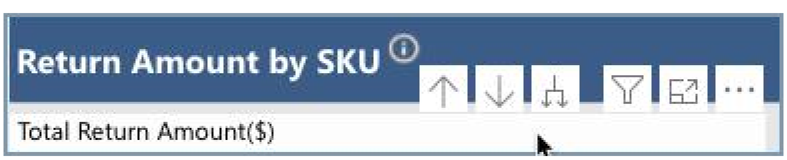
> *Tip*: Your user account must have permission to access the BI dashboard. If you don't have access, contact your company's Client Administrator or your Customer Success Manager.



Tips for using the BI Dashboard

Your BI Dashboard uses the Microsoft PowerBI platform. While the interface is intuitive and this page provides helpful usage tips, see the PowerBI Training site for more detailed documentation.

- You can refresh the data by refreshing the browser window.
- The left menu has two sections:
  - **Conversational AI**: metrics for your conversation-based interfaces such as Webchat, Facebook Messenger, etc.
  - **Post Purchase Self Service**: metrics for your Linc-hosted Order Status and Tracking page, Returns and Exchanges page, and Linc-powered emails.
- Many metrics have date pickers at the top right.
- Many metrics have a hover menu.



  - **Drill down or up**: see more granular, lower- or less granular, higher-level slices of the data, usually based on dates. For example, when viewing quarterly data from 2019 to 2020, you enable *drill down* and then click the bar of 2020Q1, it displays January, February, and March of 2020.
  - **Expand all down**: see lower-level data, across a wider set of dates. For example, when viewing quarterly data from 2019 to 2020, you select *expand all down*, it displays monthly data from January 2019 to December 2020.
  - **Filter**: displays the filters that are in use.
  - **Focus mode**: expands the visualization to fill the window.

    - **More (...)**:
        - **Export data** in .xmlx or .csv formats
        - **Show as table**
        - **Get insights**
        - **Sort ascending and descending**
        - **Sort by attributes**
- To make the numbers across two periods comparable, the rules are as follows:
    - WOW % will only show when there is data for at least 14 days.
    - MOM% will only show when there is data for at least 60 days.
    - YOY% will only show when there is data for at least 2 years.
        - first record of the following metrics:
            - unique shopper for the past 365 days : 2019/10/2
            - self-service user for the past 365 days : 2020/6/30
            - total opt-in/ service opt-in / marketing opt-in : 2020/11/24
- Many metrics have informational icons that provide descriptions of the metrics.

If you have questions about interpreting or using the metrics contact your Customer Success Manager.

Changelog

October, 2021

- Date picker changes:
    - A new *Last 30 Days* setting, which is now the default time range.
    - New *Last 365 Days* setting.
    - Can set your own range using *Custom Data* option.
    - New field displays the current date range.
- On the *Usage Trend by Messages* page, there is a new *Total Interactions (Sessions)* report that counts the number of unique sessions. If a session spans multiple days it will only be counted for the first day. If a user is inactive for 30 minutes the session will time out.
- On the *Usage Trend by Messages* page, the name of the *Session* widget changed to *Total Interactions (Sessions).*
- On the *Intent Distribution* page, the *User Intent* bar chart changed from showing a percentage of the total to showing the counts. You can still see the percentages by hovering over the bars.
- On the *Resolution Effectiveness* page, there are two new reports:
    - *Average Messages Before Handoff-to-agent*: The average number of messages (both Linc and customer entries) before the conversation was handed off to an agent. The calculation excludes the greeting and “ask for customer service” messages.
    - *Average Messages between Agent and User*: The average number of messages (both agent and customer entries) during the conversation with the agent.
- On the *Webchat Analysis* page, changed the *Chat Interaction* report to *Messages Sent and Received*, which is the total of all messages from Linc and from customers. (The previous report had included the number of times a URL sent by Linc was clicked by a user. That metric is no longer included in the new report.)
- On the *Notifications Performance* page, the *Notifications Sent* report changed to *Notification Info*. For the SMS channel (setting in the upper right), the donut report shows the total number and percentage of notifications sent by Linc, and the total number and percentage of SMS messages sent by customers, including opt-in (double) and opt-out messages. If you change the setting to look at only Messenger notifications, it shows only the notifications sent by Linc.
- On the *Shipping&Delivery Performance* page, the *Delivered & Delayed Shipment Trend* report changed the visualization from a vertical bar chart to a vertical stacked bar chart.
- Minor changes to window labels (capitalizations).

Manage your Ad Campaigns

- Requirements
- Access the Ad Campaign page
- Create a new campaign
- Manage campaigns

The Campaign Manager tool in the Client Portal helps you create and manage ad campaigns that are displayed on the Linc-hosted Order Status and Tracking Page. The campaign carousel widget shows images that your customers can click to go to other pages on your website.

You can create as many campaigns as you want, however, your customer will only see two in the same timeframe.

Requirements

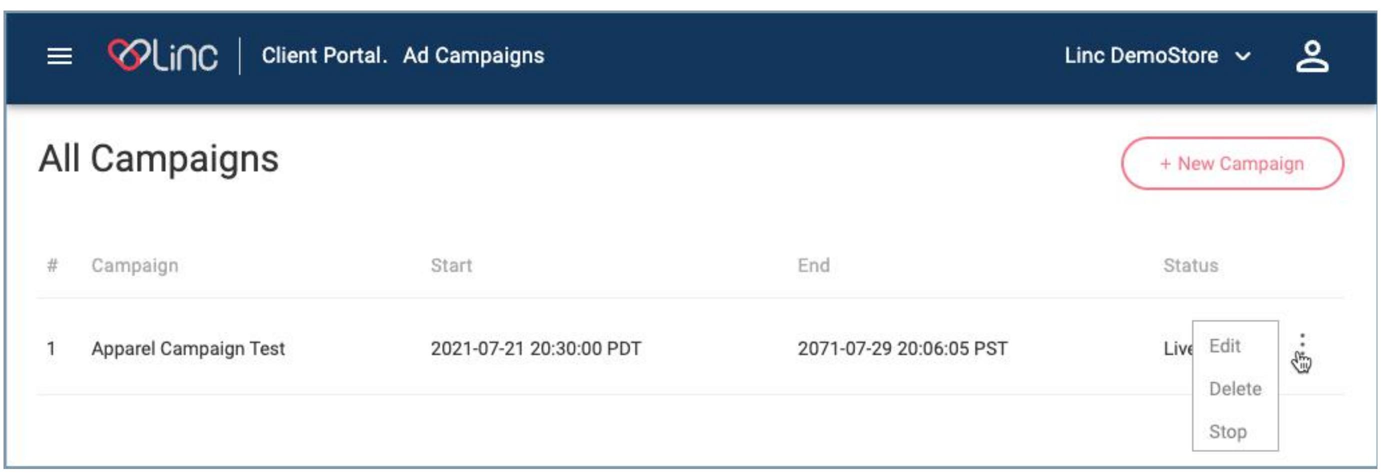
Requirements for images:

- Up to 5 image files
- 600 x 600 pixels
- .png or .jpeg format
- Recommend <200 KB size

Access the Ad Campaign page

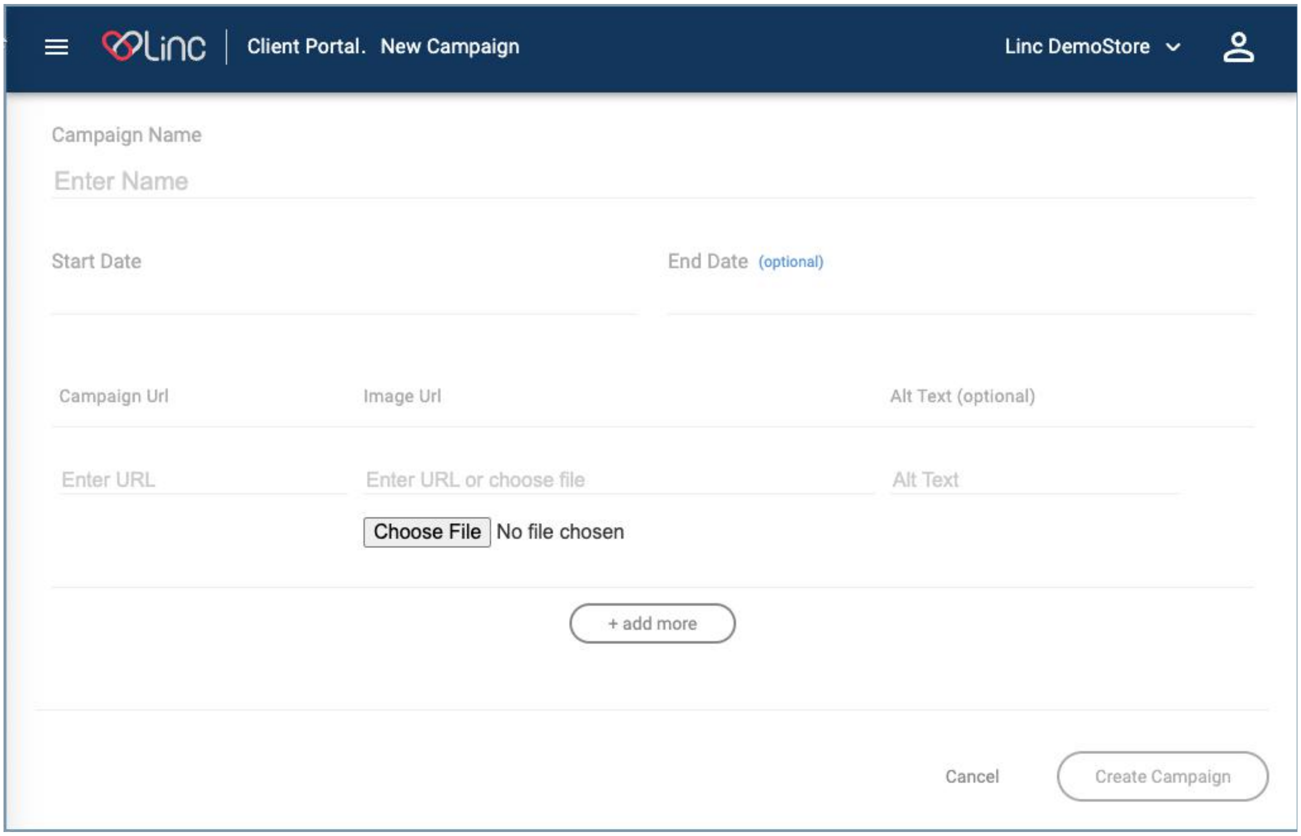
1. Go to the Client Portal:
    - Staging: https://portal.staging.letslinc.com/
    - Production: https://portal.letslinc.com/
2. From the left menu, select *Marketing apps > Ad campaigns*.

The Ad Campaign window opens, showing your list of ad campaigns. In this example there is a test campaign.



Create a new campaign

1. On the Ad Campaigns home page, Click *New Campaign*.
   The New Campaign window opens.



2. Enter a name for the campaign.
3. Enter a start date.
4. Optionally, enter an end date. If you don’t enter an end date, the campaign will run until you delete or stop it.
5. Add up to five images and their URLs to be used in the campaign carousel. The sequence in which you add them is the sequence that will be used in the carousel. For each image/URL pair:
    a. Enter the URL to be used on the campaign image.
    b. Click Choose File to upload an image.
    c. Enter alternative text for accessibility compliance.
6. Click *+add more* to add more image/URL pairs.
7. When you’ve finished adding image/URL pairs, click *Create Campaign*.

> *Tip*: If the start time is already past, the campaign status will immediately be “Live”, and the images will appear on the Linc-hosted page.

Manage campaigns

You can edit, delete, or stop a campaign using the menu on the right of the Ad Campaigns page.

- Edit means you can update your images, URLs, and time frame.
- Delete will remove the campaign.
- Stop means that the images will not display on the Linc-hosted page. If the campaign is stopped, the menu will let you start it again.

