

BOLD360 ONBOARDING GUIDE

Welcome to Bold360!

We put this guide together to help get your Bold360 subscription started quickly and efficiently. Below you will find questions to consider, an invitation to join our LogMeIn Customer Ambassador Program, experiences and trainings by role type, and additional resources for becoming a Bold360 power user.

Questions to Consider Before You Begin

After purchasing your Bold360 subscription, look through some of the following questions to ensure you are prepared to meet the needs of your organization:

- What is your implementation go-live date?
- Are you looking to implement a chatbot, support center, live chat or a combination?
- Is this your first implementation, or will you be transitioning from another solution?
- Who are you responsible for supporting? (employees or customers)
- What kind of pain-points are you solving?
- How will you train your admins/agents?
 - Explore some of our helpful resources listed below, including our [Embark training page](#)
- Which languages do you want to support?
- Who will be responsible to maintain your knowledge base?
 - Will there be a primary content manager?
 - Do you have existing content which you can use?
- How will success be measured?
 - Do you want to measure specific KPIs?

Before you Get Started with Bold360

We think you're a big deal, so we created a program just for you: The LogMeIn Customer Ambassador Program. By becoming an Ambassador, you'll join other Bold360 and Rescue customers from around the globe to share feedback and ideas that help shape the future of our products. In exchange for your insights, you'll receive VIP access and benefits, including rewards, opportunities and early access to new features!

[Join our LogMeIn Customer Ambassador Program Here](#)

[Visit Embark for Training](#)

Customizing Your Bold360 Experience: What will your role be for this deployment?

By selecting an experience below, you will be equipped with the tools you need to be set up for success and become a Bold360 power user.

*Please note, you may manage more than one experience for your Bold360 deployment depending on your organizations project team.

Bold360ai Account Manager Experience

- Console Basics & Advanced
- Content Management
- Widget Configuration & Touchpoints
- Reporting

Widget Configuration & Touchpoints

- Basic Widget Configuration
- Advanced Widget Configuration
- Implementation
- Proactive Engagement Configuration
- Channeling

Bold360 Admin Experience

- Step One: Organization
 - Organization – Basics
 - Organization – Advanced
- Step Two: Channels
 - Configure Chat
 - Configure an Email Channel
 - Messaging
 - Optimizing Channels
- Step Three: Customers
 - Chat Invitations
 - Optimize Interactions
- Step Four: General
 - Data Protection
 - Permissions
- Integrations
 - API
- Bold360 Reporting

Bold360 Live Agent Training

- Bold360 Live Agent Experience
 - Introduction to the Agent Interface
 - Agent Console Overview
 - Agent Chat Operation
 - Agent Best Practice Guide

Helpful Resources to Dig Deeper

To help you understand all that LogMeIn Bold360 has to offer, we have compiled some of our most valuable resources in one location.



Bold360 Embark Training Portal

A personalized portal for information on all things Bold360!



New Features in Bold360 AI

See all the new features introduced in the latest release of Bold360 AI.



LogMeIn Customer Ambassador Program

Ask questions and get answers about Bold360 from other users!



LogMeIn Bold360 AI Support Center

Your go-to source for up-to-date guides, release notes, support articles, and more.



Agent DIY Deployment Guide

Step-by-step instructions, tutorials, and troubleshooting tips, so you can now self-deploy a Bold360 Agent, quickly and easily.