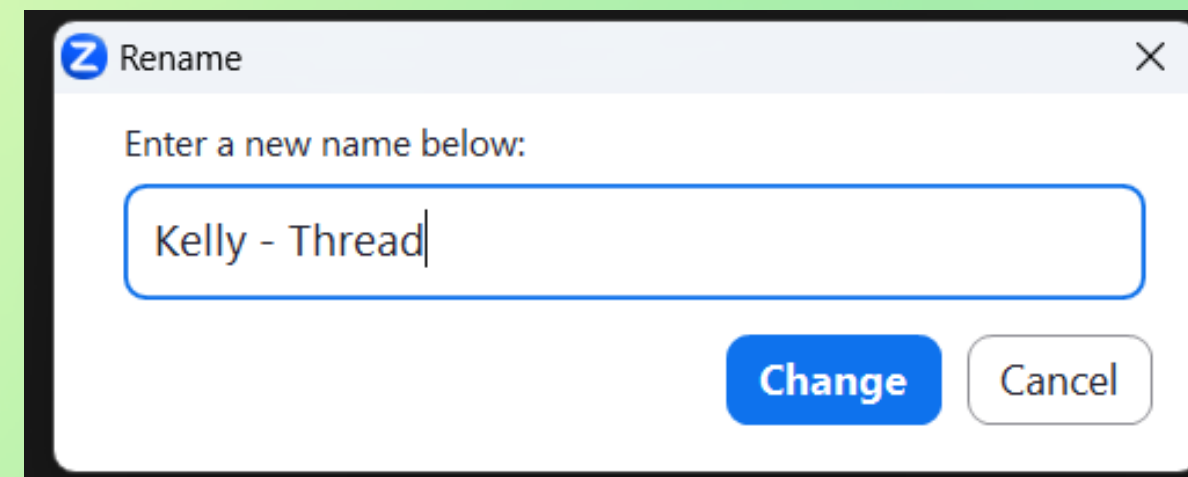
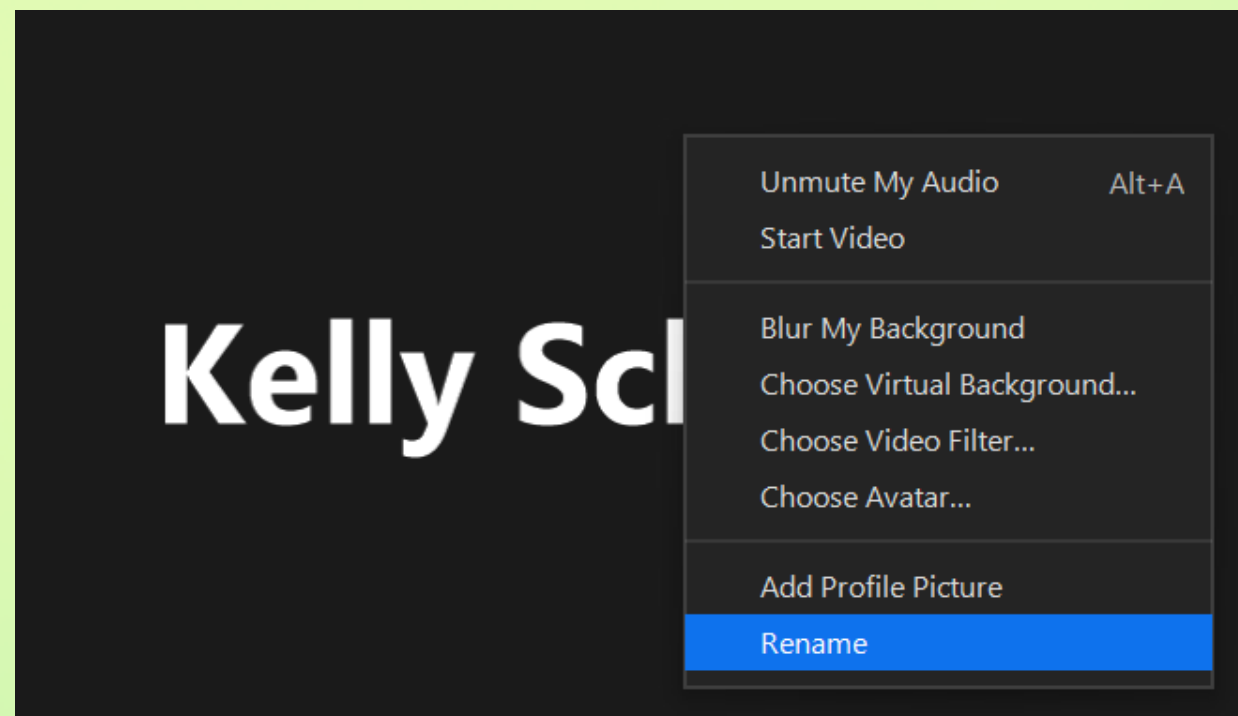


# thread

Please right click to rename your Zoom avatar: "Name + Company"



**Amanda Swanson & Kelly Schwarz**

Customer Success Managers



Let's make service magic together! ✨

**thread**

# Welcome to Thread!



**Amanda Swanson & Kelly Schwarz**

Customer Success Managers



**Let's make service magic together! ✨**

**thread**

# Introductions

- Amanda Swanson, Customer Success Manager
- Kelly Schwarz, Customer Success Manager
- Griffin Steinman, Support Engineer
- Stephen Boss, Head of Customer Success

Let's make service magic together! ✨

**thread**

# Resources & Community

- **WEEKLY: Live Service Team Training** ([https://calendly.com/stephen\\_thread/thread-service-team-training](https://calendly.com/stephen_thread/thread-service-team-training))
- **WEEKLY: Live Office Hours** ([https://calendly.com/stephen\\_thread/thread-weekly-office-hours](https://calendly.com/stephen_thread/thread-weekly-office-hours))
- **Discord:** <https://discord.gg/VFHxzj8wcf>

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**thread**

# Guided Onboarding Schedule

- Tuesday 12pm ET: #1 Getting Started with Thread
- Wednesday 12pm ET: #2 Thread Flows & Inbox Channels
- Thursday 12pm ET: #3 Thread AI + Q&A
- Weekly Service Team Training
- 1:1 Post-Onboarding calls (scheduled with your Customer Success Manager)

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**thread**

# Training #1: Getting Started with Thread



**Amanda Swanson & Kelly Schwarz**

Customer Success Managers



Let's make service magic together! ✨

# thread

## Today's Goals

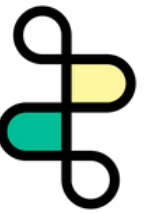
- Design a custom, branded chat app for your customers
- Install and test the customer chat app in your internal (or sandbox) environment

\*You will need:

- admin access to Thread
- admin access to internal Teams environment (if applicable)

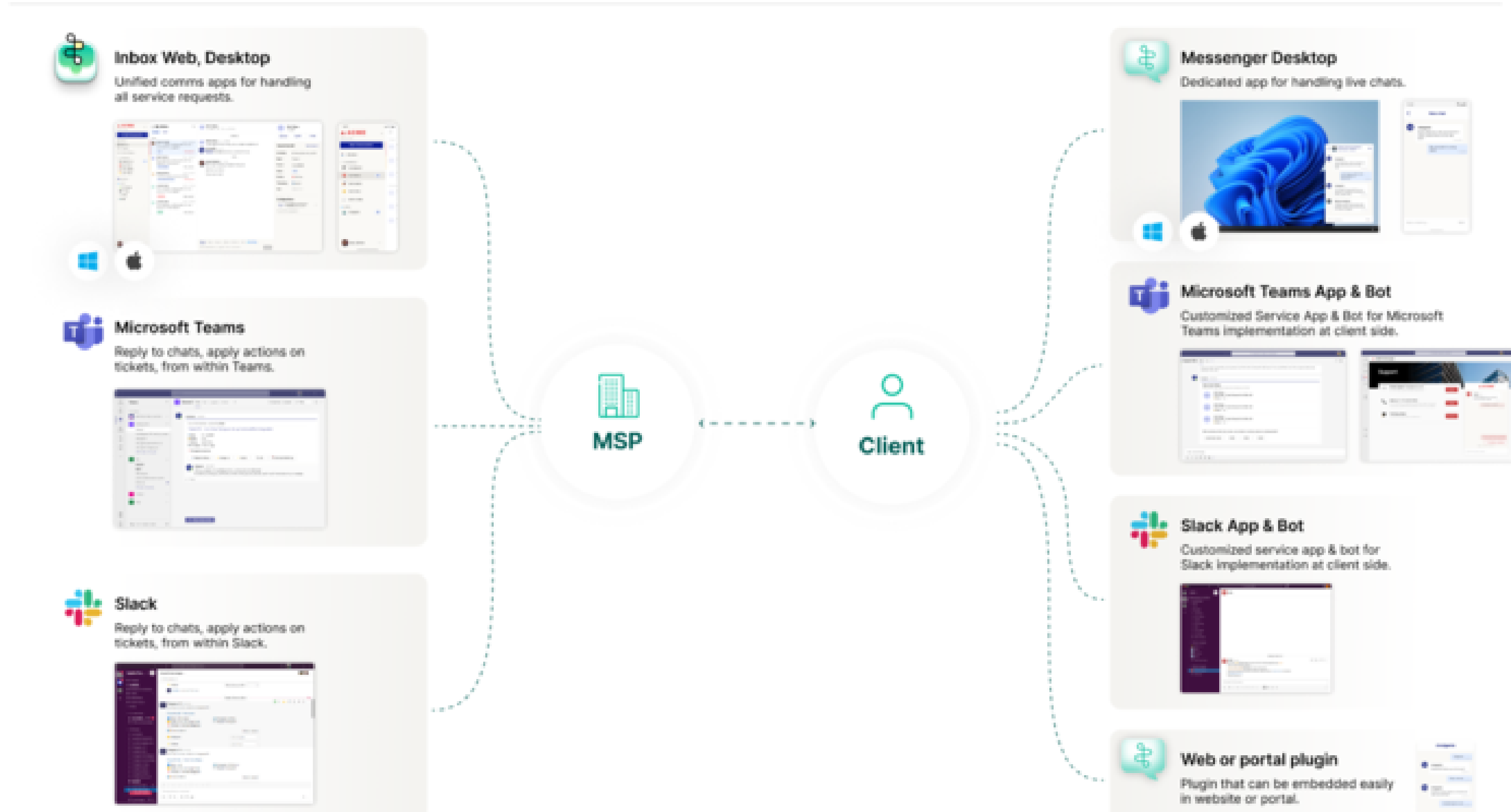
Let's make service magic together! ✨

# Thread Overview

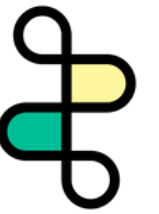


Companion App: **Deliver Service**

Client App: **Get Service**





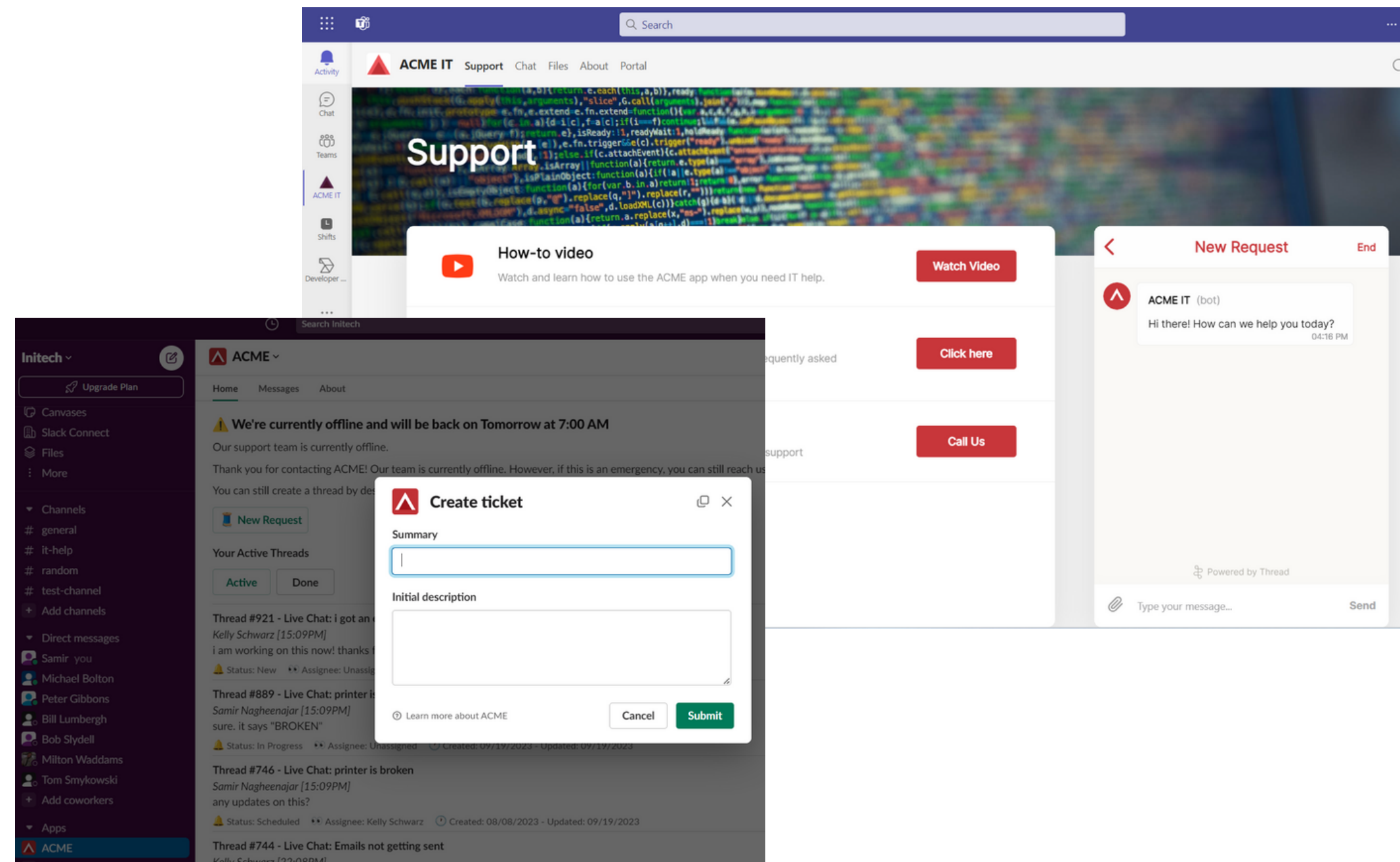


# Service Apps (Customer-facing chat)

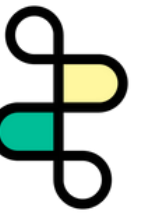
- A new, fast, convenient way for your customers to get in touch with you
- Customize and brand the experience, including on a per-client level
- We will be helping you install the apps in your customers' environments next week

## Available for:

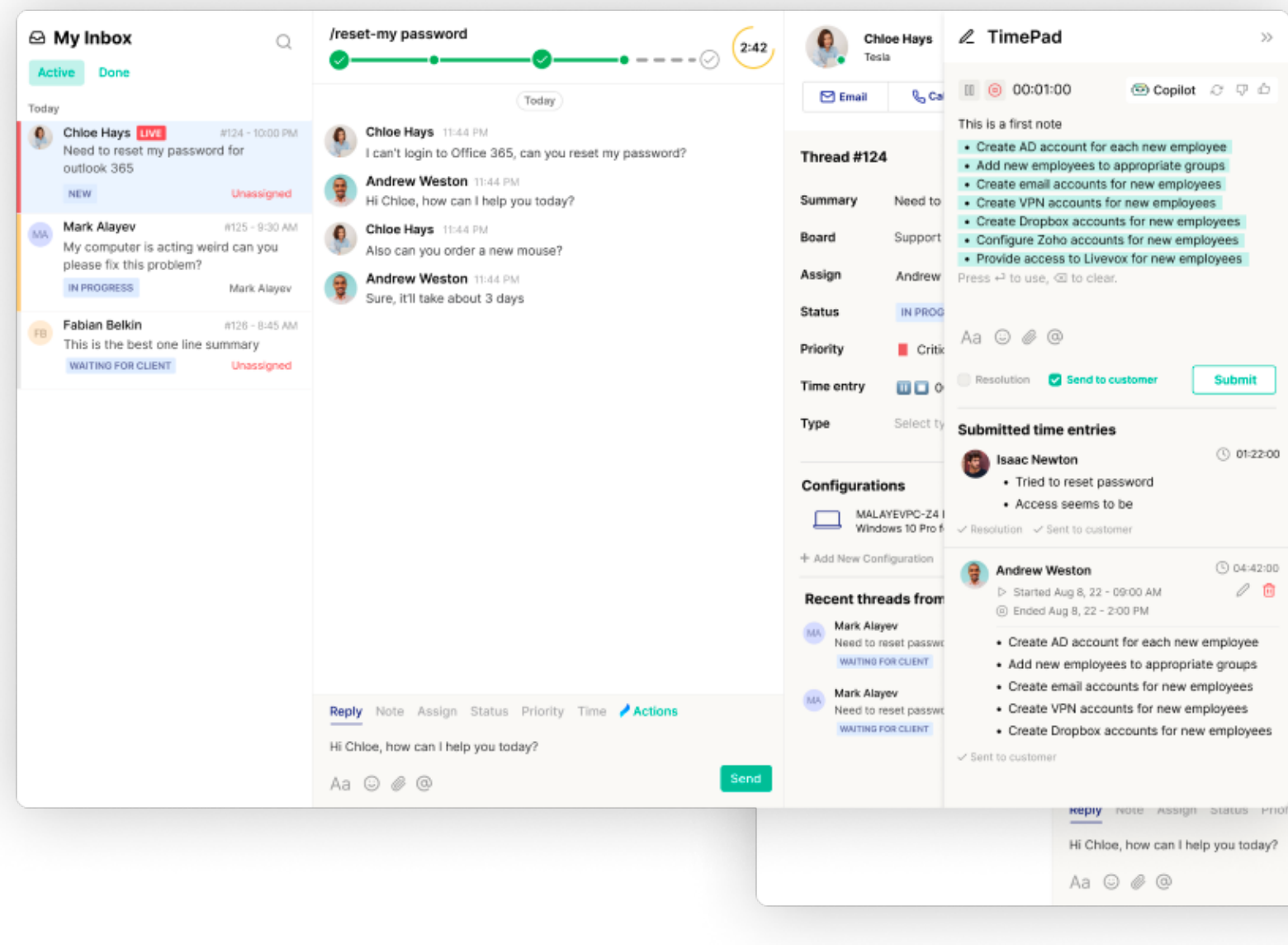
- Teams
- Slack
- CloudRadial
  - embedded in Teams (recommended)
  - CloudRadial portal
- Desktop
- Web



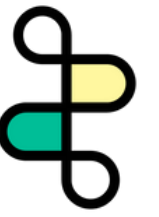
# Thread Inbox



- Bi-directional sync with your PSA
- A **real-time** interface for responding to both chats and other tickets
- Additional streamlining and automation your service team will love
- Available via **web** and **desktop**



# Pods (ConnectWise) and Insights (Autotask)



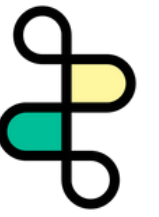
- Real-time interface directly in Manage and Autotask
- Enables responding in real time to chats (but you can use them for other tickets as well!)

## ConnectWise Pods

The screenshot displays the ConnectWise Pods interface. On the left is a vertical navigation menu with icons for Sales, Marketing, Procurement, Project, Service Desk, Time & Expense, and Finance. The main area is titled "Thread Chat" and shows a ticket status bar with stages: NEW (checked), RESPONDED, ASSIGNED (checked), and DONE. The ticket details include: Contacts: Samir Nagheenajar; Members: Kelly Schwarz, Amanda Swanson. The chat history shows a request for the best resource to assist, a list of questions (Affected service(s), Number of users impacted, Business priority), a "Thank you" message, and a "See less" link. Recent messages include: Amanda Swanson (Internal, 2:13 PM) replying to Kelly; ACME IT (Internal, 2:18 PM) stating the user has left the chat; and Kelly Schwarz (2:42 PM) thanking the reporter.

## Autotask Insights

The screenshot displays the Autotask Insights interface. The thread is titled "Thread: Real time notes" and shows a status bar with stages: NEW (checked), RESPO... (checked), WAITIN... (checked), and DONE. Ticket details include: Contacts: Stephen Boss; Members: Stephen Boss, with a "+2 more" link. The chat history shows a message from Stephen Boss (12:57 PM) saying "hi there!" and tagging @Bobby Jacobs with the message "hey can you help??" followed by a "Thread" update (12:58 PM) stating "Stephen Boss is assigned and". At the bottom, there are options for "Reply", "Note", "Assign", and "More", a text input field with the placeholder "Message or type '/' for commands", and a "Send" button.



# Teams/Slack Companion Apps (internal-facing collaboration)

- allows your service team to receive ticket notifications in Teams or Slack and interact with them
- you can respond to your teammates AND customers from Teams and Slack

Name	Status
Refactr	Configure
Auvik	Configure
Automate	Configure
PSA	Running
ITGlue	Configure
Cloudradial	Running
MS Teams	Running

## Teams Companion App

Thread 8/22, 2:46 PM Updated

New Ticket has been updated by Thread

**Thread #796 — Live Chat: ransomware warning in my email**

- User: Samir Nagheenajar
- Status: >Closed
- Board: Help Desk
- Assign: Unassigned
- Company: Initech

**Priority 1 - Emergency Response**

Reply in Inbox | Assign to | Action | Call | Schedule Meeting

11 replies from Thread

Reply

## Slack Companion App

Chatgenie APP 1:03 PM

New Ticket has been updated by Thread

**Thread #2073 — Live Chat: testing 2**

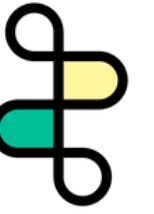
- User: Griffin Steinman
- Board: Help Desk
- Assign: Unassigned
- Company: XYZ Test Company
- Status: >Cancelled (No Email)
- Priority 4 - Low

Reply in channel | Reply in Inbox

Assign to | Action | Schedule Meeting

6 replies Last reply today at 1:19 PM

# Setup time!



- Login to <https://admin.getthread.com>
- Messenger Design
  - logo
  - bot avatar
  - bot name
- Teams App Design
- Install Teams App
- Test!

# Congratulations! You have now...

- **Created a custom, branded chat app for your customers**
- **Installed and tested the customer chat app internally**



# What's next?

- Continue testing the customer chat app internally
- Finetune settings and design for the customer chat experience
- Create additional chat apps as necessary

**Wednesday 12pm ET: Thread Flows & Inbox Channels**

**Thursday 12pm ET: AI + Q&A**

**You will receive a recording of today's call.**

**Sign up for Service Team Training (offered WEEKLY)**

**([https://calendly.com/stephen\\_thread/thread-service-team-training](https://calendly.com/stephen_thread/thread-service-team-training))**

**Sign up for Office Hours (offered WEEKLY):**

**([https://calendly.com/stephen\\_thread/thread-weekly-office-hours](https://calendly.com/stephen_thread/thread-weekly-office-hours))**



**thread**

# Technical Support

- Help Docs: <https://docs.getthread.com>
- Chat with us via the widget in your admin panel: <https://admin.getthread.com>
- Chat with us: <https://help.getthread.com>
- Email us: [help@getthread.com](mailto:help@getthread.com)
- **Feedback & release notes:** <https://feedback.getthread.com>

Let's make service magic together! ✨



**thread**

Let's make service magic! ✨