Vergic Engage

# Visual design process – best practice

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# 1 Overview

**Even if Vergic Engage comes with 'out of the box' chat panels and banners, you are far from limited to this design. Vergic Engage offers full control over the CSS and design for dialog panels and banners to match any company graphical profile.**

Most customers are fine with the discrete 'standard design' provided by Vergic and therefor, in most cases there is no actual design process but for other customers the visual requirements is higher. Therefore we have 3 design options:

1. Standard design (3h), included
2. Custom design, (15h), Option
3. Advanced design (>15) Option

Its important to not underestimate the time it takes manage the visual design for customers who require custom design. This is because when custom design is required there is many different competence skills/people involved.

The customer might involve Marketing and his/her own UX team and designers. Before a frontend developer can style the chat with CSS (start the programming) its not unusual the design team have spent 10-20h on designing.

*For customers that is satisfied with the "standard design" its a much more simple process where Vergic only changes a base colour and images (if customer have own images). This standard design process requires no more than 3h and is usually included in the setup price.*

# 2 Guidelines and lessons to be learned

- IMPORTANT: Decide early if the customer requires “Standard” design OR “Custom design” (see definition below)
- IMPORTANT: Never start the styling-process until the design have been signed-off by the customer. Changes after sign-off should be payed by the customer. Its time consuming to change the design afterwards the styling (coding) have begun.
- IMPORTANT: A Designer needs to test and verify a custom design after the frontend developer have done the programming. A developer has other focus when translating design to CSS and will not fully see the flaws in the programing/styling
- **Make clear to the customer that changes after the sign-off needs to be charged as extra hours**
- In a early state: Decide if the service agent should use personal agent images or be represented by a avatar or chat icon.
- The “custom design” is usually created in Photoshop (templates is provided) and later translated to HTML. Trying to skip this step and make design direct in HTML/CSS is not a successful process due to its time consuming media. First do design in Photoshop or dynamic design apps as UXpin– then translate to HTML/CSS
- Text in banners are “dynamic”. This means that designers only make design for one “Tabbanner” or “Takeover” banner even if you might have 10 banners in a configuration. The same banner can have different text depending on contextual appearance:
    - Tabbanner 1: “Do to you want help with Kitchen”
    - Tabbanner 2: “Do you want to know more about beds”
        - Same design – different messages

# 3 The design process

## 3.1 Standard design process – best practice

- Customer is briefed about the chat and banner UI
- Deliverables from customer
  - Colour codes
  - Images
  - Copy for banners
  - Copy for chat panels
  - In some case the customer use the "**Standardbanners and Chatpanels, Extended pallet. 1.4.pptx"** to create a simple mock up.
- A Vergic/partner frontend developer styles the chat based on "Standard dialog"-panels + the information from customer about colors and images
- The chat is tested and approved by customer
  - If not approved adjustments are made by frontend developer
- The chat goes live

## 3.2 Custom design process – best practice

Our experience is that you will save a lot of time if the Vergic/Partner Designer first create a design proposal based on the customers graphical profile. The customers Designer can then use this draft to complete the design. We do this because the customer designers don't

know the limitations of what can be altered and not. Usually a suggested design reaches 80% and the customer designer puts their finish on the proposal to complete it.

**Usually it requires about 3 draft turns between Vergic designer and Company designers** before signing of. After this process the styling by a developer can be done. During this time we work in Photoshop and no coding is done.

***NOTE: Its important to not start coding until the design is 'signed off' to save time. Starting to code to early in the design process will be very time consuming when changes has to be done direct in the code.***

**Best practice 1 (most common):**

1. Customer sends graphical guidelines to Vergic Designer
2. Vergic designer makes a initial design proposal based on customers graphical profile and sends to Customer Designer as PNG files (About 15 exported from the Photoshop template file)
3. The Customer Designer reviews the design and make a list of changes that's sent back to the Vergic Designer
4. The Vergic designer do the changes and sends a new set of PNGs to the customer
5. **Step 3 and 4 is repeated until customer is satisfied**...
6. The customers signs of the design
7. A frontend developer translate the design into (HTML/CSS)
8. The Vergic designer test the design (internal testing before showing customer)
    a. This usually takes quite some time and is also a cycle where the designer creates a correction list in ie Trello and the developer adjust until the Designer approves the styling
9. The styled chat and banners are released to the customer for testing in different devices
    a. Customer designer either approves the styling or...
    b. Creates a list of corrections (NOTE not new design – only changes where the styling does not match the signed-off design.

If the customer has the Photoshop skills, step 3 and 4 can be removed. The Photoshop template is then handed over to the customer after a initial design proposal from Vergic and is competed by the customers Designer. **This however is not so common.**

# 4 Terminology

- Banners
  - The visual clickable banner that is used to initiate a chat for a visitor
- Dialog panels
  - Once a agent responded to a chat request the visitor will see the dialog panels
    - Queue panel
    - Chat panel
- Theme
  - The CSS for Dialog panels
  - You can only have one styling of the dialog panels but banners can have unlimited styling
- Designer
  - A designer works with marketing or UX team to create a custom design. This is usually done in static applications as Photoshop or more dynamic as UXPin.
- Frontend developer
  - A developer that programs the CSS. He/she “translate” the design in to code
- VEP Workspace
  - The admin UI. Here you can style the chat and banners .
- Styling
  - The process where the frontend developer translate the design from JPGs to HTML

# 5 Design possibilities and limitations

- You can change all CSS to effect the visual impression of banners and dialog panels
- You can't change animations effects. These are complex JavaScript's that takes different devices and breakpoints into consideration
- You cant add new buttons or functions to the UI but pleas pass on ideas about improvements to our UX team
- Images needs to be uploaded on a webserver. Vergic can host images on customers account but then needs to be administered by Vergic. A better solution is if the customer can upload the images to their own webserver. The image URL is then used in the Edit tool for banners and themes within the VEP workspace.

# 6 Resources

- All templates and material mentioned can be downloaded from our partner web:
  - https://www.vergic.com/resources/partnermaterial/