



Lumo — Chat User Guide

- Accessing the Inbox
- applying filters
- reviewing customer information
- Pre-Chat Support Checklist

1. **Purpose**
2. **Overview of the Workflow**
 - a. **Steps 1–5**
3. **Pre-Chat Support Checklist**

1. Purpose

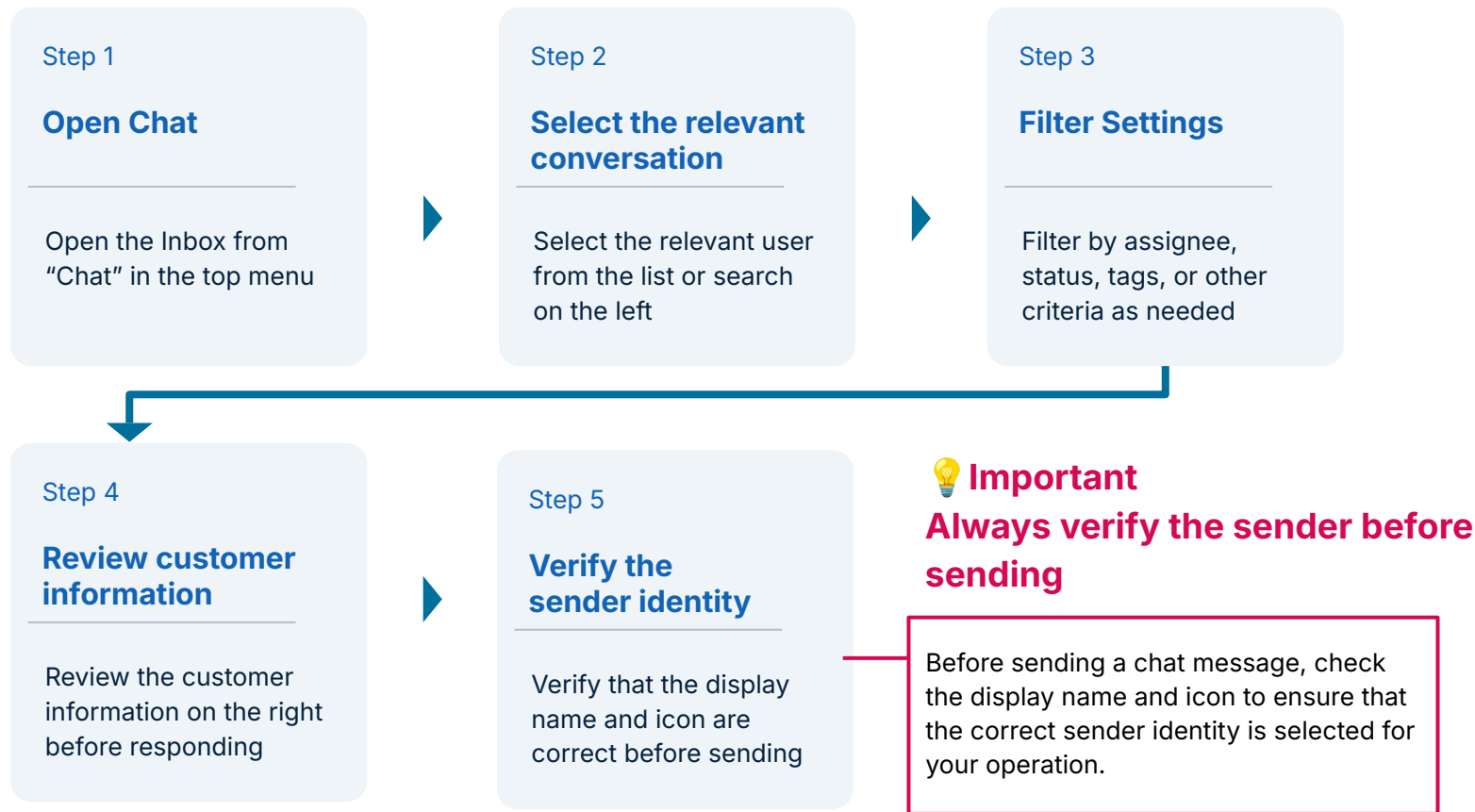
In Lumo's chat screen,

- **Identify the relevant conversation**
- **Filter Settings**
- **Review customer information**
- **Verify the display name and icon before sending**

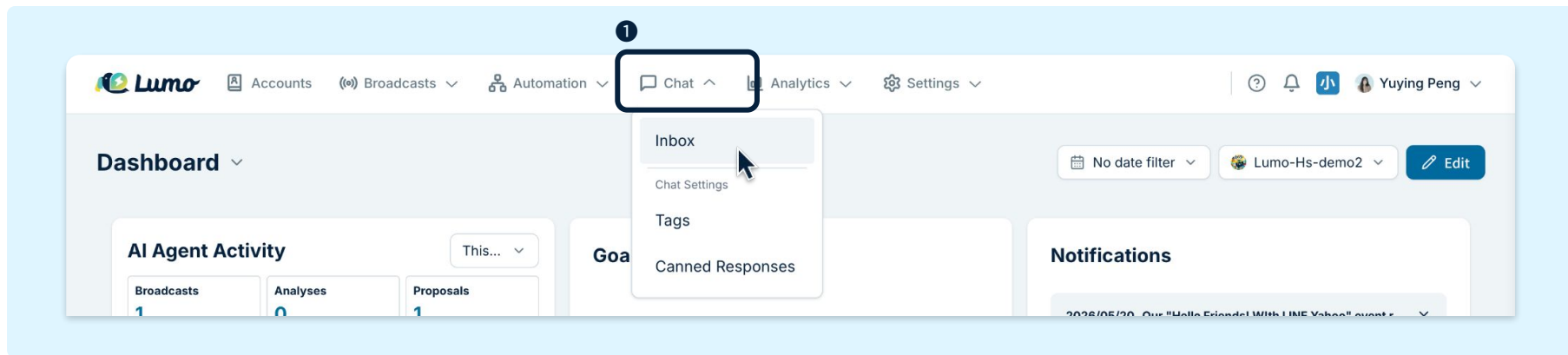
this guide explains how to complete the items above with confidence.



2. Overview of the Workflow



Step 1 | Open "Chat" from the Top Menu



Click "Chat" in the top menu

The Chat drop-down menu will open.



Select "Inbox" from the menu

Click "Inbox" at the top, not Tags or Templates.

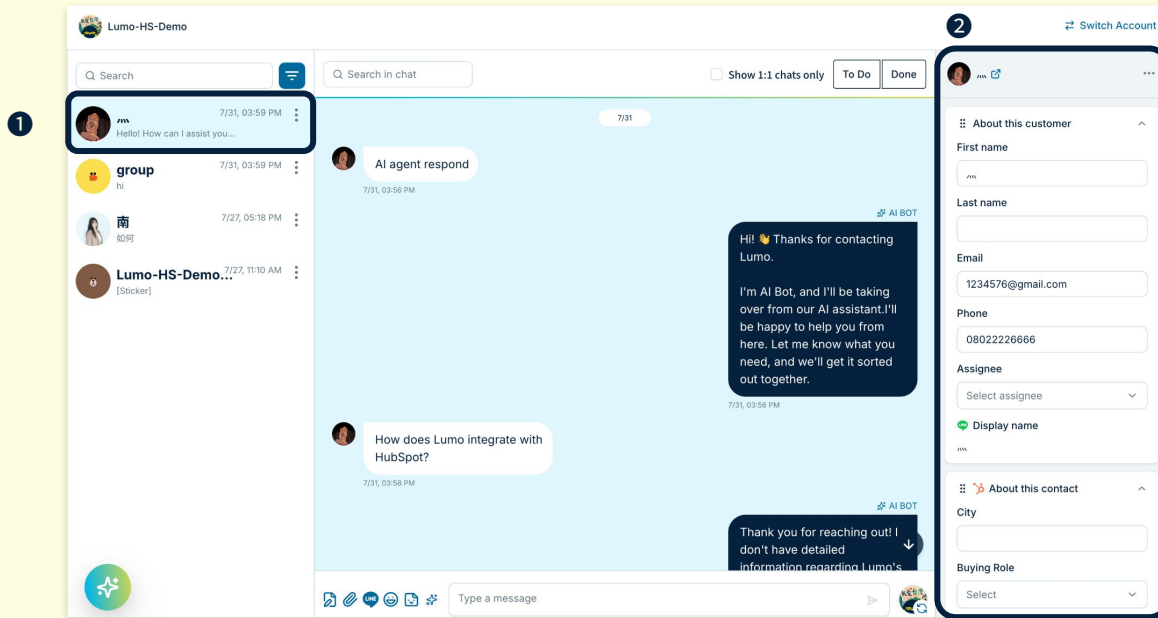


The screen will change.

Go to the Inbox

A list of conversations with customers will appear.

Step 2 | Select the Relevant Conversation in the Inbox



From the Inbox on the left,
select the person you want to chat with

Customer information
will appear on the right

Review the displayed
information

Step 3 | Apply Filters

The screenshot illustrates the process of applying filters in the Lumo-HS-Demo interface. On the left, a search bar is shown with a filter icon circled in blue and labeled with a '1'. A 'Filter' dialog box is open in the center, with the 'Tags' dropdown menu circled in blue and labeled with a '2'. The 'Tags' dropdown is open, showing a list of tags, with 'リビーター' (Reviewer) selected and circled in blue and labeled with a '3'. The 'Apply Filters' button at the bottom of the dialog is also circled in blue and labeled with a '3'. The background shows a chat interface with a search bar and a message from 'AI agent respond'.

Open Filters

Click the filter icon next to the search field on the left

Select Criteria

Set the criteria you want to use for filtering.

Click "Apply Filters"

Click "Apply Filters" to apply the filter settings

Step 4 | Review the Customer Information on the Right

The screenshot shows a mobile app interface with three numbered steps:

- 1** **About this customer**
First name
Last name
Email
1234576@gmail.com
Phone
08022226666
- 2** **Assignee**
Yuying Peng x
Display name
- 3** **About this contact**
Email
1234576@gmail.com
City
Buying Role
Select

Review Basic Information

Check the name, email address, phone number, and other details to ensure you have the correct customer.

Verify the Assignee and Display Name

Verify that the assignee and the display name shown in the chat are correct.

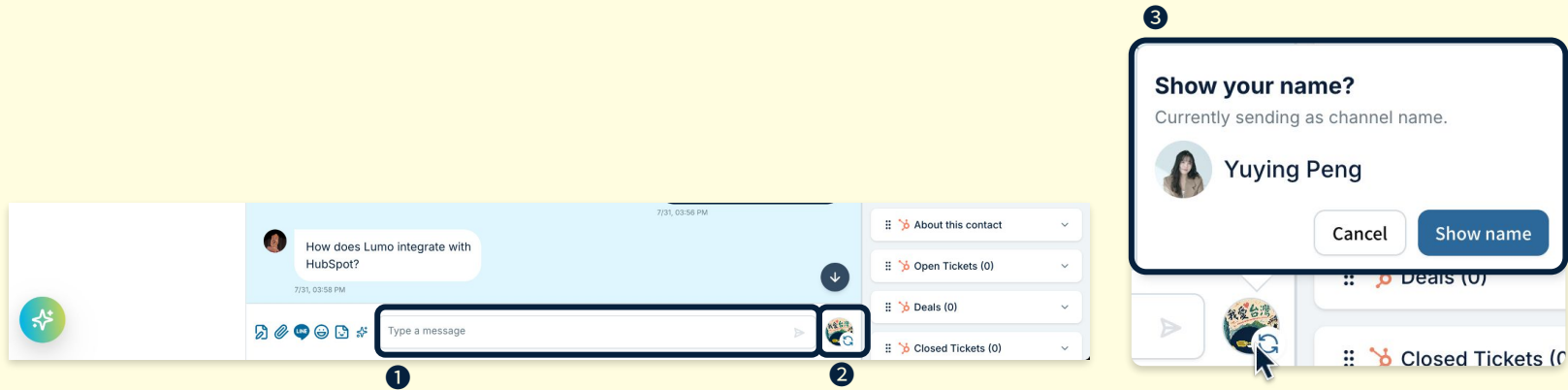
Review Contact Information

Review details such as the meeting start time under "About this contact," as needed.

Points to Check

- Confirm that you have selected the correct customer
- Confirm that the booking details match the inquiry
- Determine whether an assignee needs to be set
- Determine whether you need to review the conversation history

Step 5 | Verify the Display Name and Icon Before Sending



Enter Your Message

Enter your reply in the message field.

Click the icon next to the Send button

Set the criteria you want to use for filtering.

Send with the Correct Sender Identity

Confirm that the updated name and icon are displayed before sending.

⚠ Note: If you do not verify the display name and icon before sending, the message may reach the customer under an unintended sender identity.

3. Pre-Chat Checklist

Use this checklist during day-to-day operations. 📌

- ✓ The Inbox is open
- ✓ The required filters are applied
- ✓ The correct conversation is selected
- ✓ The customer information on the right has been reviewed
- ✓ The sender's display name and icon have been verified
- ✓ The message content has been reviewed before sending

Operational Note 📝

Some sections are located differently in Lumo than in the former Little Help Connect. Please follow the labels shown on screen.



Little Help Agency LLC

xLINK, 3F Shin-Otemachi Building, 2-2-1 Otemachi, Chiyoda-ku,
Tokyo 100-0004, Japan

<https://www.lumo.cx/en/>

LINE and LINE Official Account are trademarks or registered trademarks of LY Corporation.

Shopify is a trademark or registered trademark of Shopify Inc.

Klaviyo is a trademark or registered trademark of Klaviyo, Inc.

HubSpot is a trademark or registered trademark of HubSpot Japan K.K.

Lumo is a trademark or registered trademark of Little Help Agency LLC.