Chat2Desk

New features

September 2025 (v. 2.91)

chat2desk.com

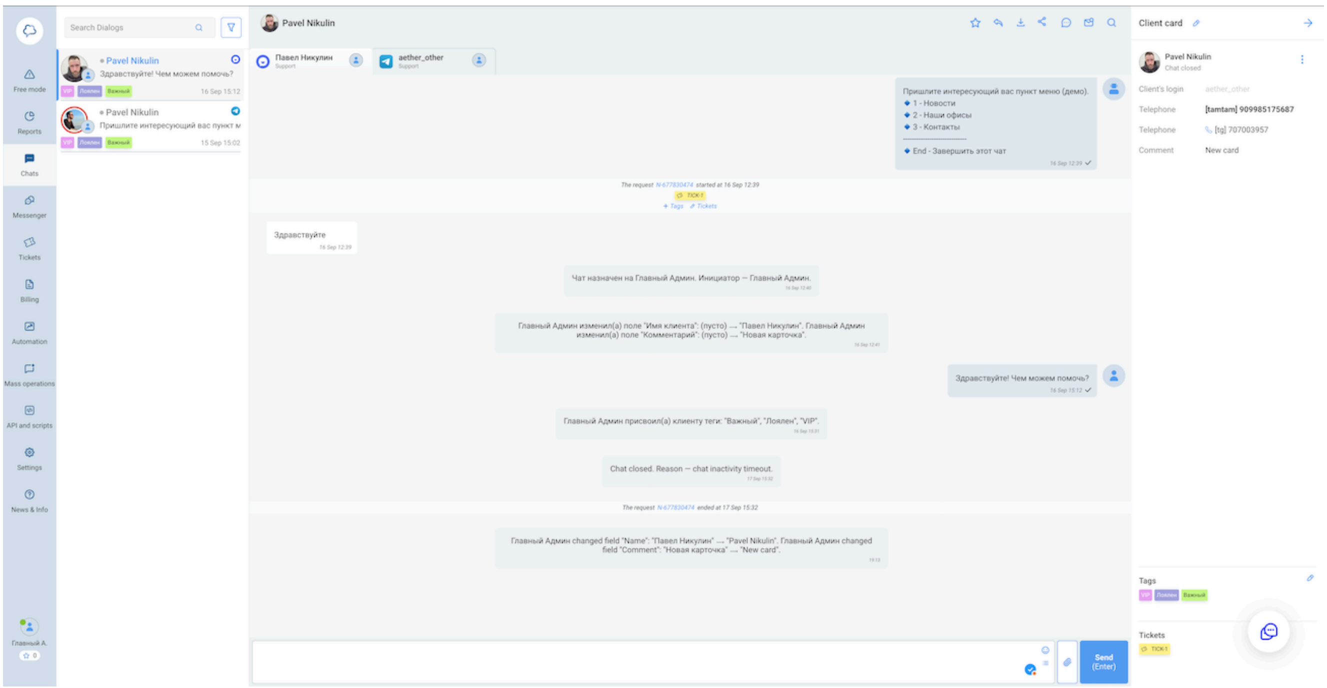
We've rolled out one of the biggest updates of the year. The release 2.91 brings a Unified Customer Card, a redesigned chat page, smarter automation, detailed reporting, and a series of improvements for WhatsApp Business API.

The changes are aimed at making daily work faster, cleaner, and more transparent for both operators and managers.

Below, you'll find a detailed overview of everything included in this release.

Unified customer profile

The biggest update in this release is the **Unified Customer Profile**. From now on, all messages from the same person across different messengers and channels are tied to a single profile. It doesn't matter if a client reaches out on WhatsApp, Telegram, or through your website chat. All conversations are grouped together and available in one place.



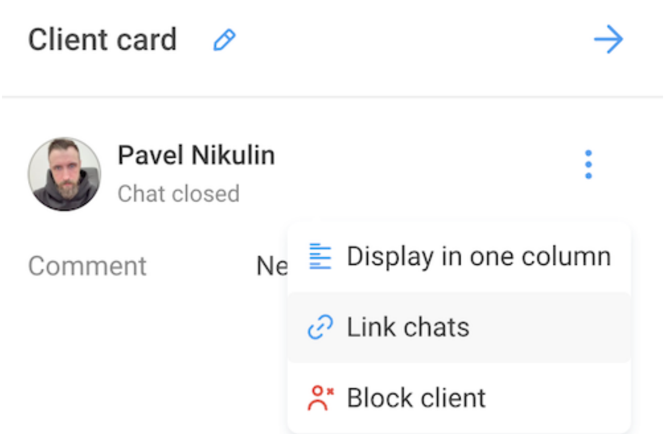
Previously, each channel created its own separate dialog. If you needed to update customer data (like phone number, email, or comments), you had to edit every chat manually. That's no longer the case. Now you update the data once, and it syncs across all the customer's chats. Most importantly: no more confusion with duplicated chats.

What you can do with the Unified Profile

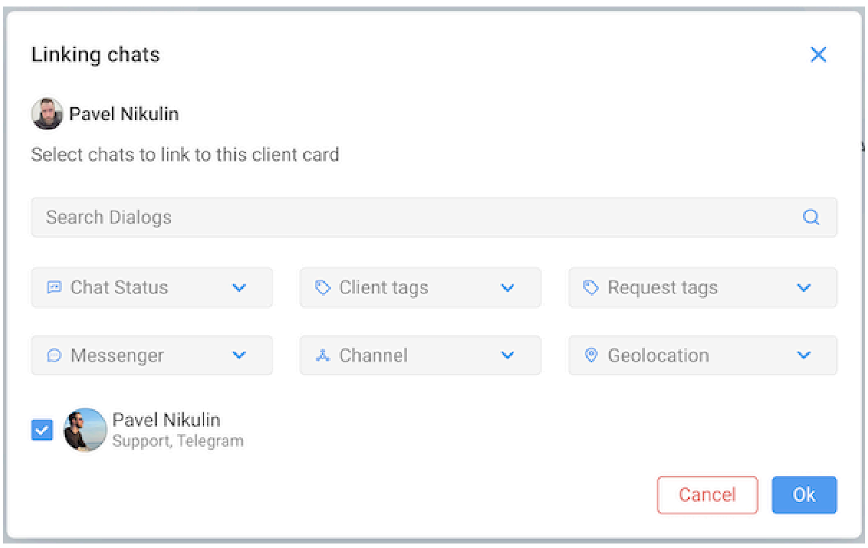
- **Centralized editing**: update name, phone, email, tags, and notes once — the change applies everywhere.
- **Quick navigation**: switch between a customer's dialogs without leaving the profile view.
- **Merge and split**: combine chats if they belong to the same person, or separate them if they don't.
- **Data control**: when merging, choose which fields to keep, merge, or discard.

How to merge customer chats

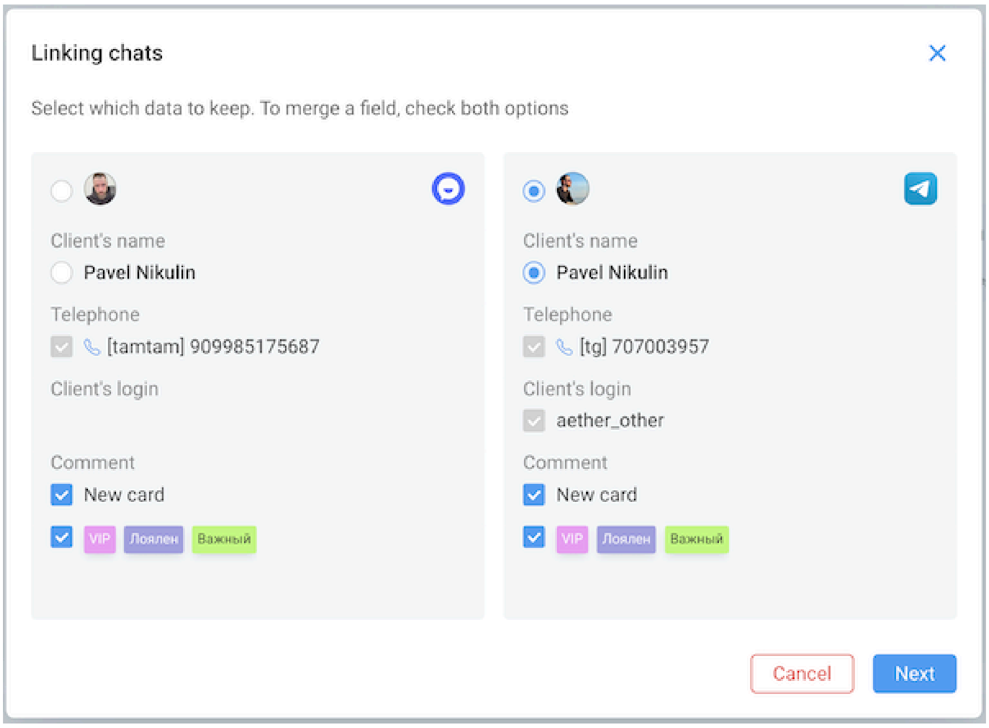
1. Open the customer profile in the chat center.
2. In the menu, select **Link chats**.



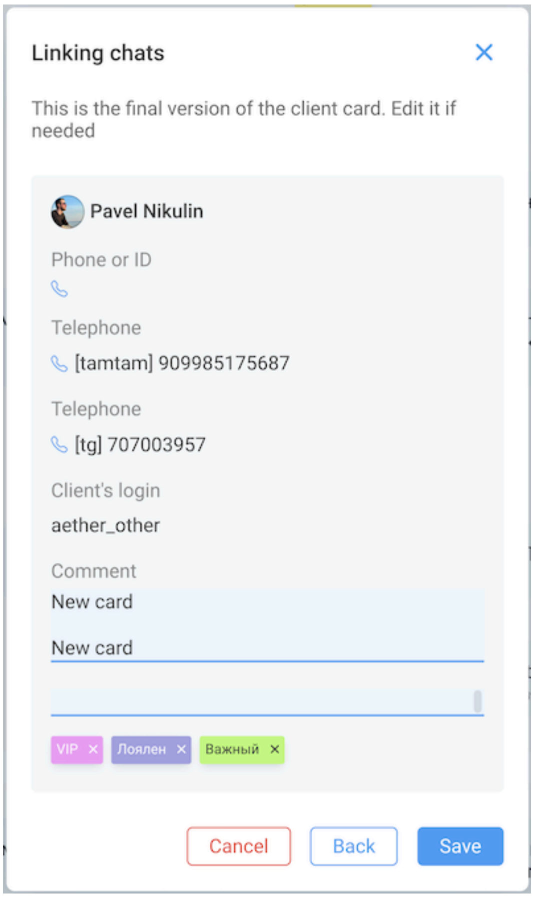
3. Search for the dialog by name, number, or ID and select it.



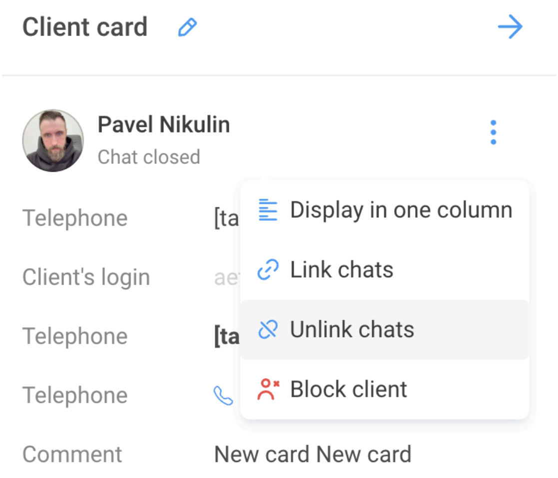
4. Decide which data fields to keep in the final profile.



5. Add a profile name and any additional details, then click **Save**.



6. If needed, you can also unlink chats: in the customer profile, select **Unlink chats**.

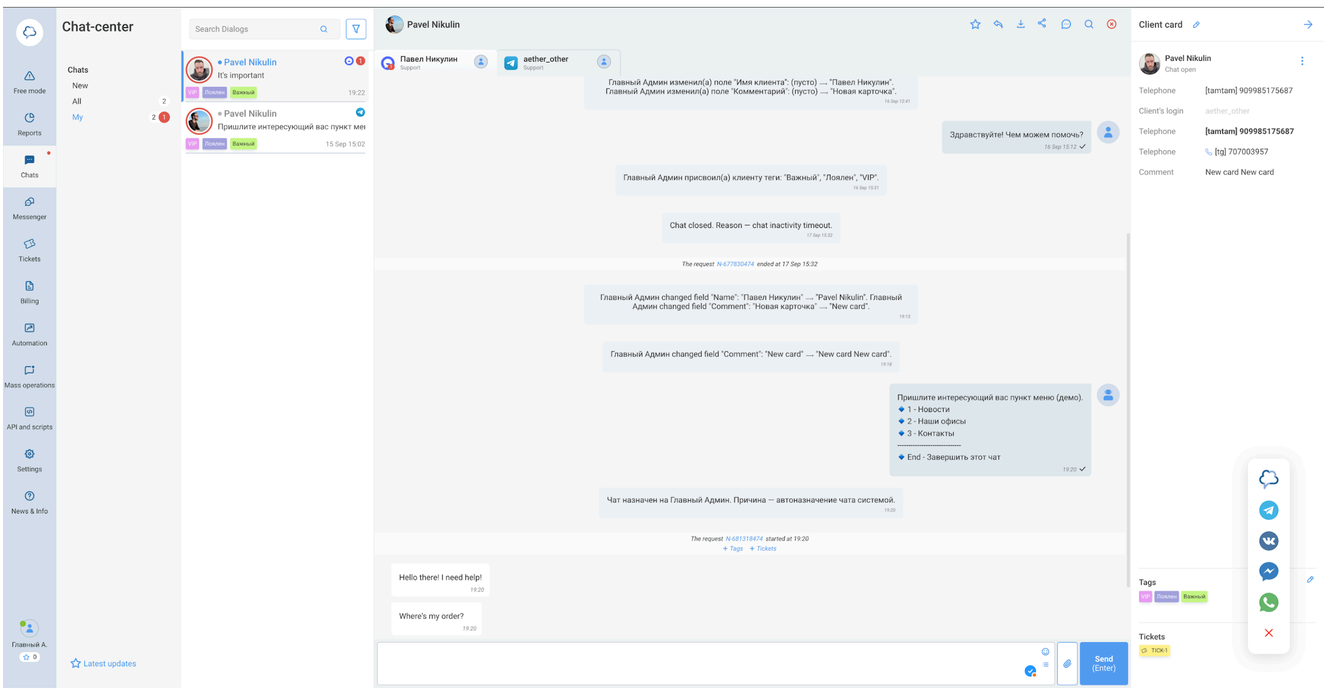


Access to merge/unlink actions is managed in **Operators > Roles and Permissions > Actions > Link chats**.

The Unified Profile makes work easier for operators: all customer data is consolidated, even when they write from multiple channels. It's now faster to find the right dialog, edit contacts without duplication, and see the full conversation history at a glance.

Redesigned chat page

We keep refining the Chat2Desk workspace to make it cleaner and easier to use. In this release, we've redesigned the chat page: the top panel has been removed, and its elements have been moved to more logical and convenient places. The result is more space for conversations and quicker access to key functions.



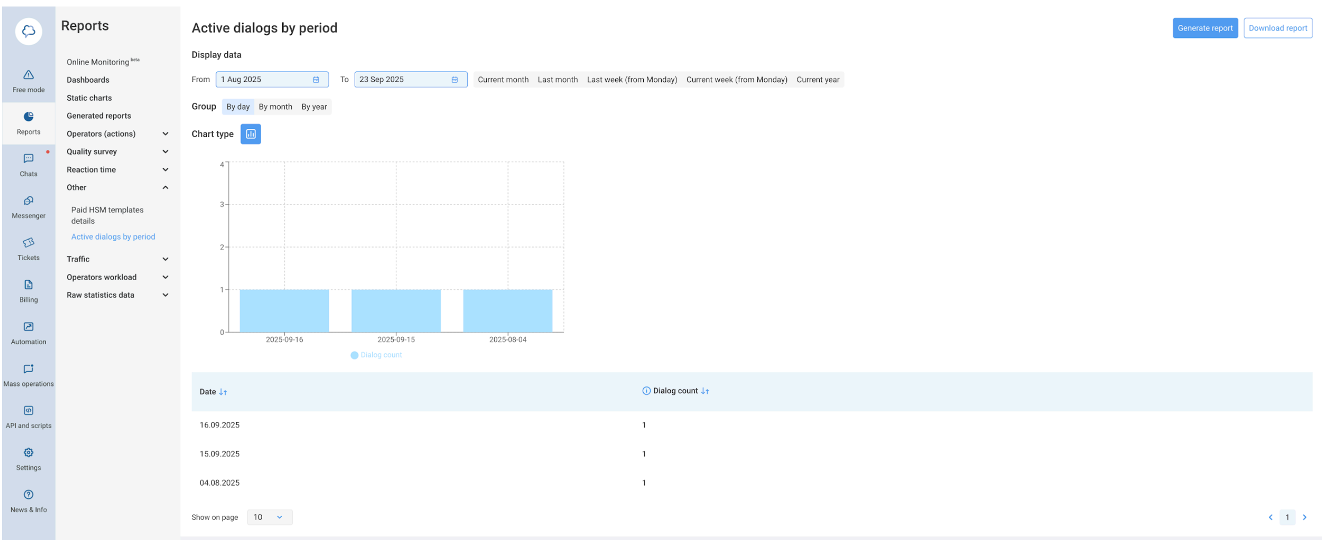
What’s new on the page

- **User profile**: the profile icon is now at the very bottom of the left sidebar. Click it to open account details: check your status, see the company balance (for admins only), change the interface language, or log out.
- **Company balance and language settings**: both are consolidated in the account window under your phone details. The balance can be refreshed instantly without leaving the page.
- **Quality rating**: operator rating is now located under the profile icon, making it easy to track performance without switching sections.
- **“New conversation” button**: stays in the same place — in the filter menu.
- ⚡ **Quick grab button**: allows you to instantly take up to three new chats. It’s now located at the top of the page, above the New conversation button.
- **Usernames**: in operator profiles, only the first name and the initial of the last name are shown instead of the full name.

The chat page now looks more minimalistic and gives operators a larger workspace. All core functions are available in one or two clicks, reducing unnecessary navigation between different menus.

Active dialog report

This release introduces a new report that helps companies better plan costs and manage team workload. You can now track how many active dialogs your company handled during a selected period and group the data by days, months, or years.



What counts as an active dialog

An active dialog is any conversation that had at least one incoming or outgoing message during the chosen timeframe. Dialogs from WhatsApp Business API are not included in this report, since they are billed separately.

Where to find it

Go to **Reports > Other > Active dialogs** over time to generate the data.

The report gives managers a clearer picture of message traffic and operator workload. It helps forecast dialog volumes, plan dialog packages more accurately, and analyze communication trends over time.

Smarter auto-assignment

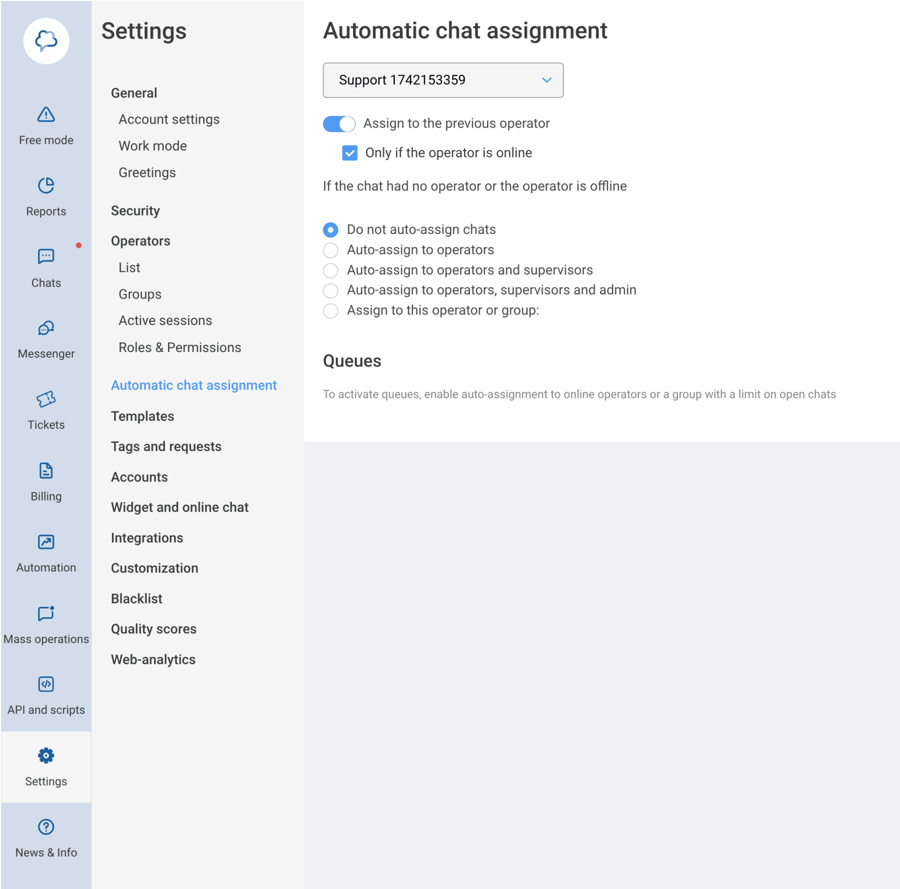
We've expanded auto-assignment settings to make dialog distribution more consistent and personalized. Now you can choose to route a returning customer's chat back to the same operator who handled it before — even if that operator is offline when the new message arrives.

This is especially useful when clients write outside business hours: instead of being reassigned to someone else, the chat stays linked to the original operator. When they come back online, they can continue the conversation without losing context.

Available options

In **Settings > Automatic chat assignment**, you'll now be able to use two modes:

- Assign to the previous operator only if online
- Always assign to the previous operator, regardless of status



If the chat has no previously assigned operator, dialogs are distributed according to the standard rules.

API support

We've also updated the Public API. A new parameter force_assign controls whether auto-assignment rules are applied:

- **true (default)**: chats are assigned as before, even if operators have already reached their dialog limits.
- **false**: chats are assigned strictly following system rules, only to operators online with available slots in the queue. If none are found, the dialog stays in **New**.

This change reduces confusion for clients and keeps communication consistent, while giving teams more control over how chats are routed.

Auto top-up for dialog packages

Your team will no longer lose access to customer chats when a dialog package runs out. With this update, Chat2Desk automatically activates an extra pack of 100 dialogs once the limit is reached, as long as the company has an active plan and sufficient funds in the account.

How it works

- When all available dialogs are used up, the system instantly adds a package of 100 dialogs.
- All previously blocked chats are unlocked right away.
- Operators can continue conversations without downtime or manual intervention.

Guided onboarding for new users

Starting with this release, new companies get a built-in onboarding flow that makes the first setup simple and intuitive. The step-by-step guide launches right after registration and walks admins through the essentials: connecting messengers, adding operators, and configuring the chat center.

What's included in onboarding

- **Connect channels**: link one or several messengers to start receiving customer messages.
- **Add operators**: invite team members individually or upload multiple addresses at once.
- **Set up the workspace**: configure a basic chat center to handle conversations efficiently.

Onboarding progress is saved automatically. If you stop midway, the flow resumes from where you left off. Don't want to go through it at all? You can skip onboarding and return later via the learning center.

The onboarding experience is available to **administrators** and **supervisors** on first login.

Clear setup steps reduce the time to first response, help companies get their team running faster, and ensure no critical settings are missed at the start.

WhatsApp updates

This release brings various long-awaited improvements to WhatsApp Business API channels, making conversations smoother for both operators and customers.

Voice messages via Gupshup and Cloud API

Operators can now record voice notes directly in the web interface, listen to them before sending, and re-record if needed. Customers receive messages in the native WhatsApp audio format.

Previously available for 360dialog, this feature is now supported in Gupshup and Cloud API as well.

Payload-based buttons in bot scenarios

Buttons in WhatsApp Business API scenarios now use payload values instead of random IDs. That means:

- readable, human-friendly values that reflect the action;
- easier scenario setup and maintenance;
- the ability to return to the same message and choose another button;
- simpler integrations with external systems, since payloads can carry additional parameters.

Faster template synchronization

For 360dialog and Cloud API numbers, approved message templates now sync every 10 minutes instead of up to 3 hours. This minimizes errors like “template not found” and speeds up the rollout of new campaigns.

Import of outgoing messages

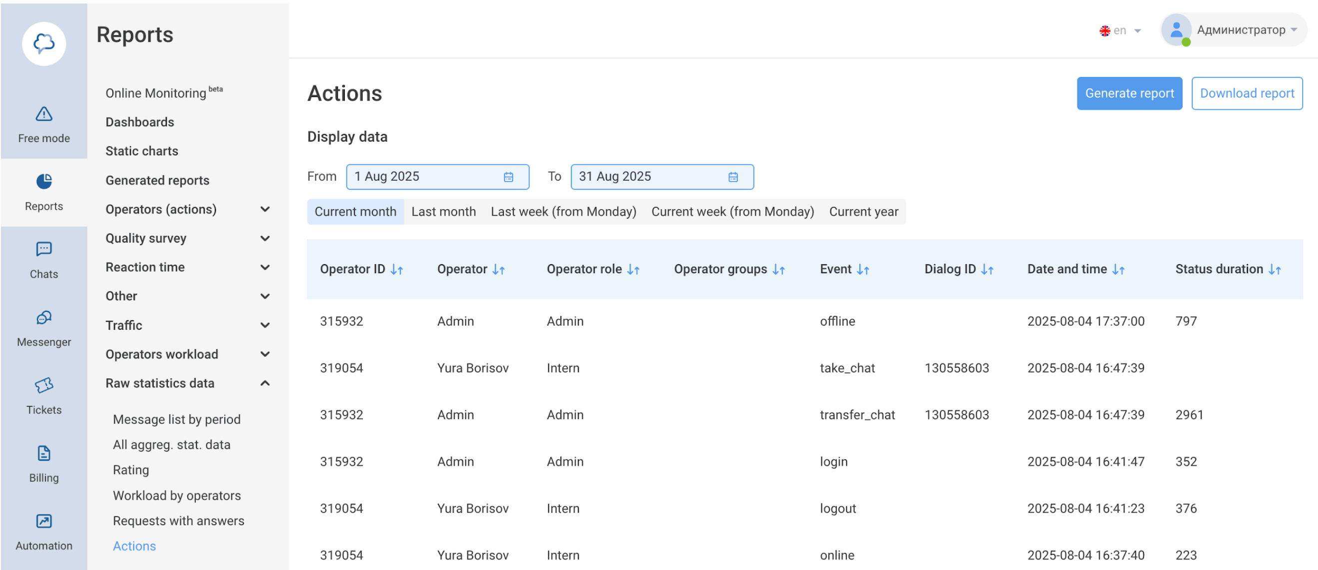
Chat2Desk can now import not only incoming, but also outgoing messages sent directly from the WhatsApp app on a phone. If an operator replies outside the platform, that message is automatically pulled into the system, keeping the full conversation history intact in one window.

Previous news

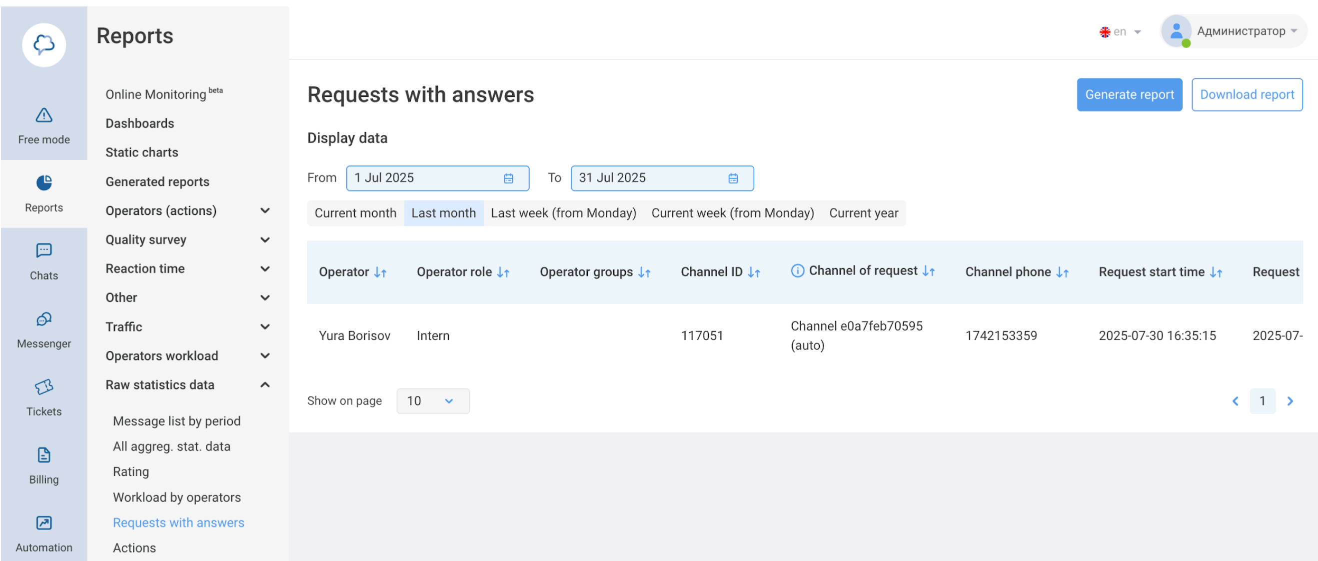
In this update (version 2.90), we've added custom roles to reports, enhanced chat transfer via Public API with auto-assignment rules, and expanded the SDK to deliver chatbot button data for mobile apps. Full details in our August release overview.

Custom roles in *Reports*

All reports containing employee data now display your custom roles.



You can see the current roles in the **Rating, Operator Workload, and Answered Requests reports**. This makes it easier to evaluate team performance and analyze operator efficiency, taking into account your custom access settings.



Respecting auto-assignment settings in Public API

Chat transfers to operators and groups via Public API can now respect your auto-assignment rules, including dialog limits and operator availability.

We've added a new parameter `force_assign` for the following methods:

- `messages/:id/transfer`
- `messages/:id/transfer_to_group`
- `dialogs/:id/`

How it works:

- If you omit `force_assign` or set it to `true`, chats behave as before — they will be assigned to operators even if all slots are full. If no assignment is possible, the chat will stay in New, and the API will return: No available operator found!
- If you set `force_assign` to `false`, chats will follow your standard auto-assignment rules:
  - assign only to online operators;
  - respect dialog limits;
  - consider queue participation.

Chatbot buttons in SDK

The SDK now transmits information about the buttons sent by your chatbots. This expands opportunities for those building custom mobile apps with Chat2Desk.

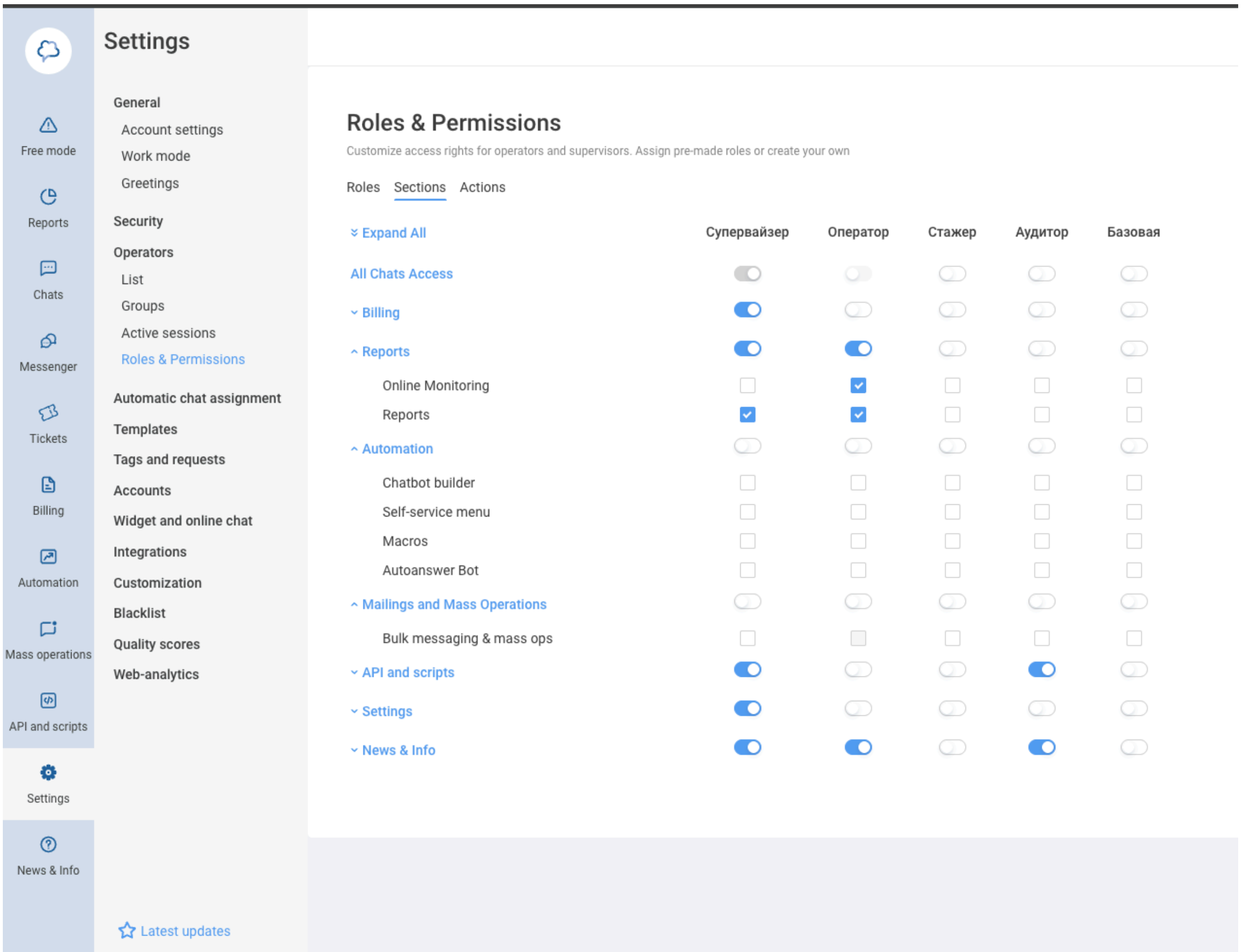
Developers can now retrieve button data from the SDK and use it to render interactive menus or simplify action selection in the app.

Important: The buttons will not appear automatically. The SDK only passes the data provided by the chatbot through the API. To display them, your app will need an update to handle these new fields.

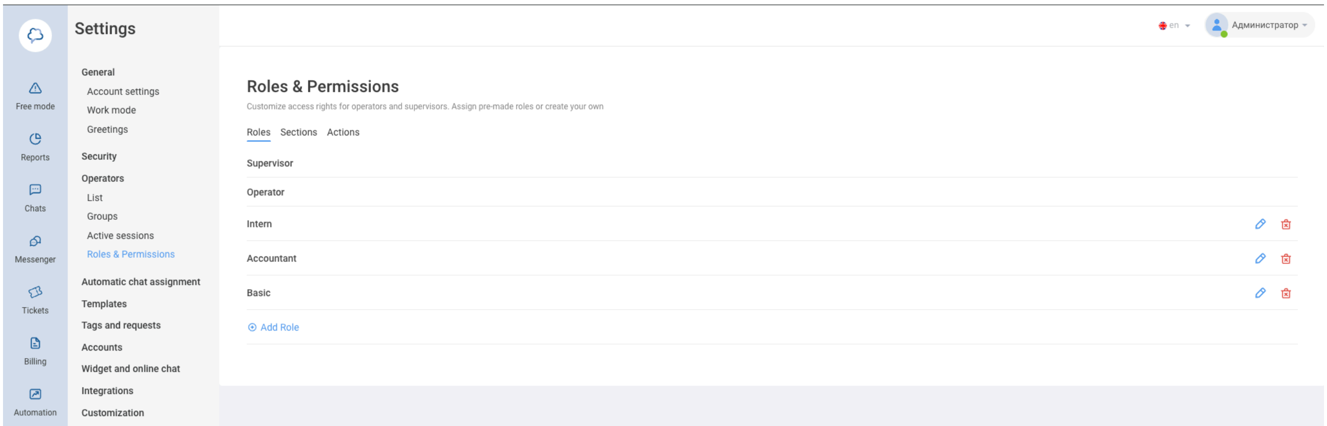
In this update (version 2.89), we've added custom roles, launched session management tools, expanded the functionality of internal chats, improved the iframe experience, introduced webhook signatures, and started showing message statuses in Telegram number-based accounts. Full details in our June release overview.

Custom roles and updated access management

We've redesigned the **Operators > Roles & Permissions** section to make permissions easier to manage. Instead of a long list of options, you now configure access via two separate tabs: **Sections** and **Actions** — with improved navigation and grouped settings.



Most importantly, you can now create **up to 10 custom roles** with tailored permissions for different employees. Whether you need to limit access for interns, give view-only rights to auditors, or set up a role with access to broadcasts only — you're in control.

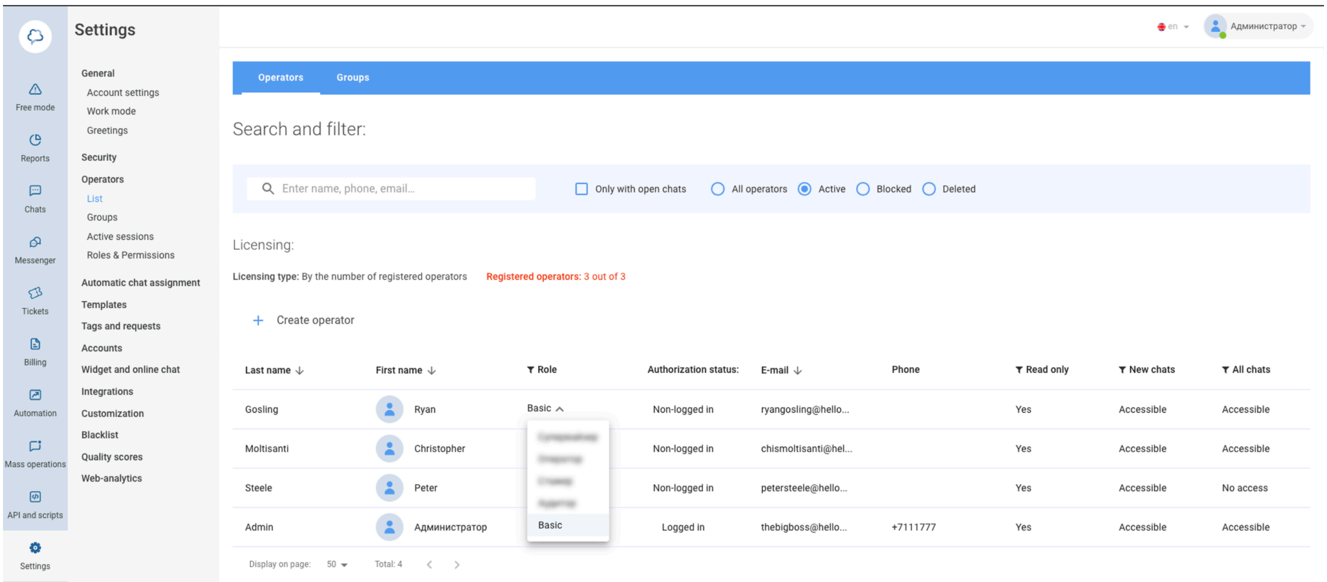


Previously, there were only three built-in roles: **Operator**, **Supervisor**, and **Administrator**. For many companies, especially those with complex team structures, this wasn't enough. With custom roles, you can fine-tune access at scale.

Each custom role is automatically based on either the Operator or Supervisor profile, depending on whether access to **All Chats** is granted. This only affects system behaviors that aren't yet customizable through the interface. Role management is available to company administrators only.

To create a role:

1. Go to **Operators > Roles & Permissions**
2. Click **Add Role** and set the name
3. Choose accessible sections and allowed actions
4. Assign the role to an employee via their operator card

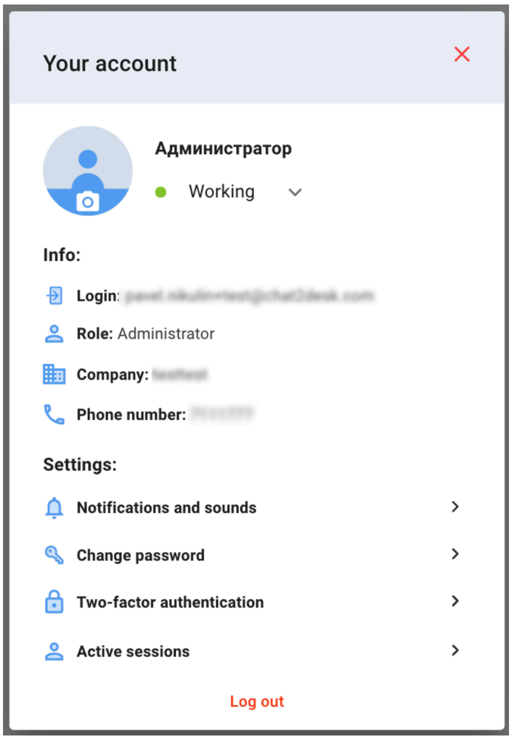


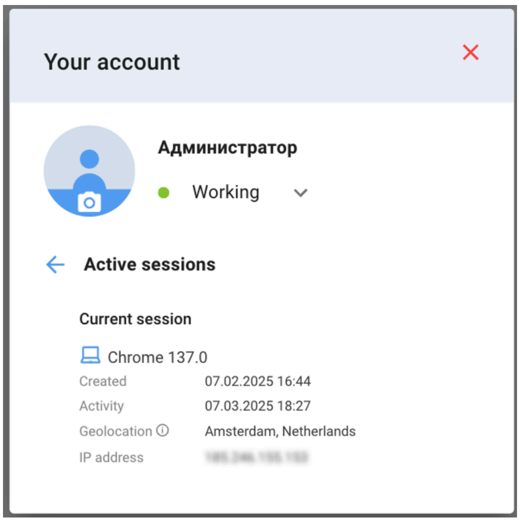
Session management from the personal account

You can now view and manage active sessions in the system. Operators can see where they're logged in, while administrators can monitor all operator sessions in one place.

In **Account > Active sessions**, users see all current sessions with details such as:

- Device type (desktop or mobile)
- Browser and version
- IP address and approximate location (with a note on accuracy)
- Login time and last activity timestamp





Technical access sessions are marked with an icon and tooltip. Users can log out of individual sessions or all sessions except the current one.

Admins can view all operator sessions under **Settings > Operators > Active sessions**, with options to:

- Search by name or ID
- Sort by recent activity
- Expand operator cards to view device details
- End specific or all sessions

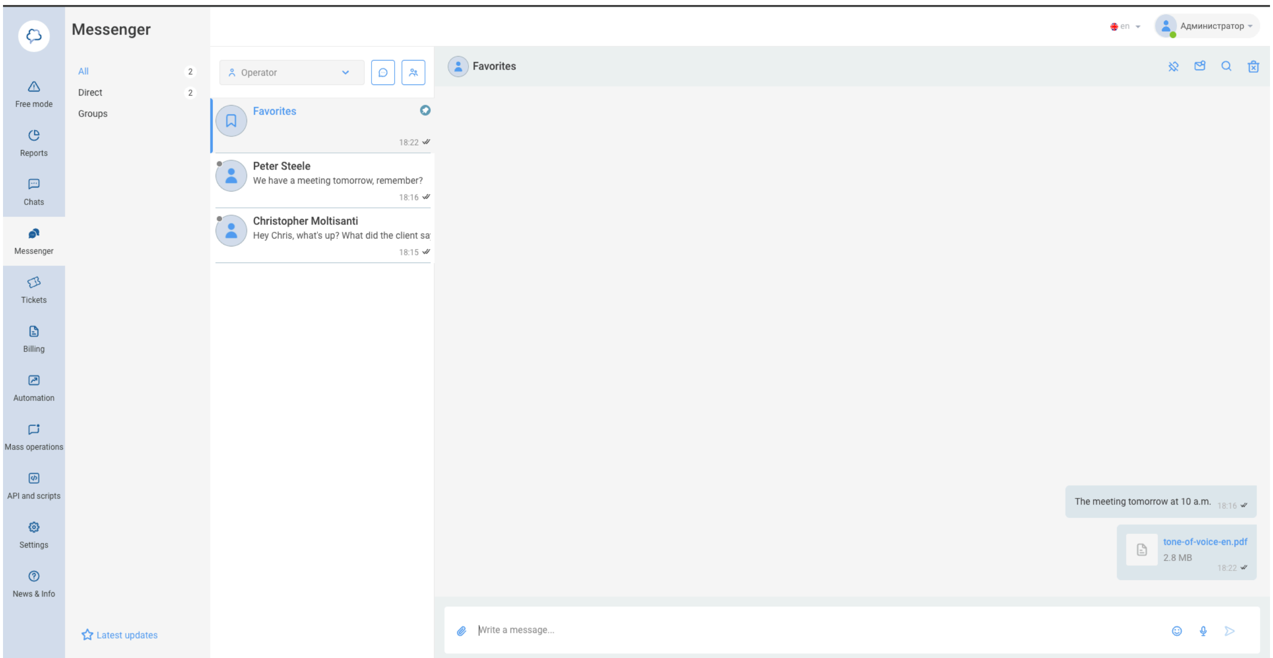
Inactive sessions don't appear in the list. Column headers and search remain fixed when scrolling.

Internal chats: starred messages and notification settings

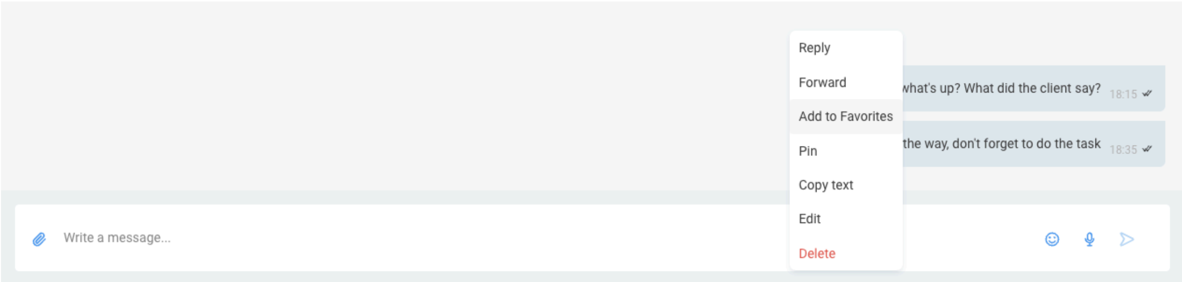
We've added two useful features to internal messaging.

Save messages to Favorites

You can now forward any message to your personal chat, marked as Favorites in the chat list. Pin it to keep it at hand for quick reference. This is a fully functional chat: you can edit, reply, delete, or forward messages as needed. Forwarded content appears as incoming, preserving the sender's name and avatar, and remains unchanged even if the original is edited or deleted later.



To use it, just click **Forward**, then select **Add to Favorites**. You'll get a confirmation once the message is saved.

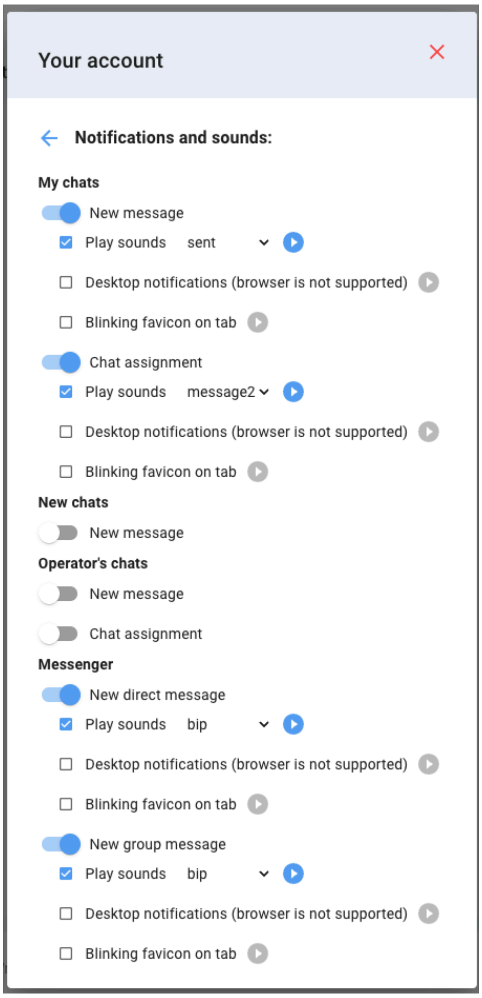


Custom notification settings

Under **Notifications and sounds > Messenger**, you can now configure alerts separately for direct and group chats. Options include:

- Message sounds (with melody selection)
- Desktop push notifications
- Flashing browser tab icon

Each setting works independently and is applied immediately. You can preview sounds, test notifications, and view tab flashing in real time.



These features are currently available in the web app. Mobile support is coming in future updates.

New iFrame controls for embedded chat

When embedding Chat2Desk in a CRM via iframe, you can now manually hide specific UI elements to simplify the interface and make better use of limited screen space.

Just add the `&disabledActions=` parameter to the iframe URL and specify which actions to hide:

- `macros` — Macros
- `assignChat` — Assign chat
- `exportChat` — Export chat
- `shareChat` — Share chat
- `comment` — Comment
- `unread` — Mark unread
- `search` — Search
- `all` — Hide all listed actions

We've also improved the overall display for narrow views: unnecessary padding is removed, modal windows are adjusted, and banners now resize correctly — making the chat interface fully usable even below 400px in width.

Webhook signature verification

All outgoing webhooks from Chat2Desk now include an HMAC-based signature and timestamp. This ensures that data really comes from us and hasn't been altered in transit.

The signature is generated using the request body, your token, and a timestamp. You can verify it on your side to prevent tampering and replay attacks.

For implementation examples in various languages, see our API documentation.

Message delivery statuses in Telegram numeric

If you're using numeric Telegram accounts, Chat2Desk now tracks message delivery statuses. You’ll see whether a message was sent, delivered, read, or failed — with detailed reasons.

For instance, you’ll know if a user deleted their Telegram account or blocked your number. Statuses work similarly to WhatsApp Business API.