NETOP™

Live GUIDE™

Rich Media Chat for Your Web Site

Operator's Guide

Version 5.0

Netop

Contents

1 Netop Live Guide

The Netop Live Guide operator console is your interface to manage contacts from customers who click a button on your company Web site because they want to get in touch with a company representative for information or for assistance.

Each customer contact session is logged, for example with information about call duration, campaign and department, to enable you to subsequently do statistics based on the historical data.

The information displayed in the customer calls list can be customized as can the use of colors and the use of audio for various types of alerts.

The three main sections below describe how to manage calls, how to use historical data and how to customize the operator console interface to match your preferences. The first section, though, briefly describes the logon procedure.

2 Log on to Netop Live Guide operator console

For your initial log on to Netop Live Guide operator console, you will receive an email with a link to the operator console as well as a password to be used for your first logon.

When you click the link you are presented with a launch screen and then a logon screen where you must type your email address and the password from the email.

When you have logged on to the operator console, you should change your password.

Password rules:
- The password cannot be the same as your email.
- The password must be at least 6 characters long.
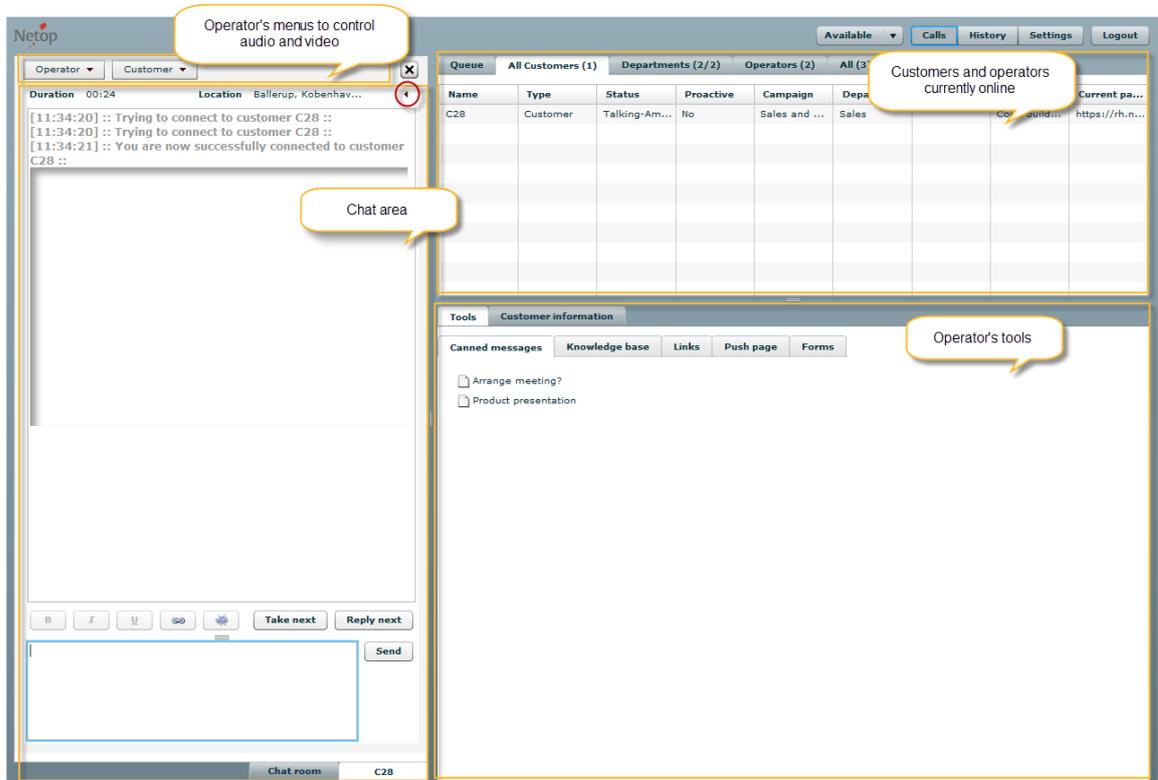- The password must include at least one upper case letter and one digit.

You are automatically asked to change your password when you log on for the first time.

See section 5.1 for information about changing password, other than on first logon.

3 Manage calls

When you are logged on and ready to received customer calls you see a window like this:

Incoming calls that have not yet been answered are listed on the **Queue** tab; the first call in the list (from the top) is the customer who has been in queue the longest.

To answer the call from the customer who has been in the queue the longest, click the **Take next** button, or you can double-click a customer information line in the queue list. You can now begin chatting with the customer in the chat area.

The chat area also displays overview information about the customer, for example the customer's location. To see more customer information click the triangle icon ◀ at the top of the chat area.

During the chat, you can choose to turn on your audio and your video from the **Operator** menu.

And you can choose whether you want this to be for the current customer only or whether audio or video should be for all customers.
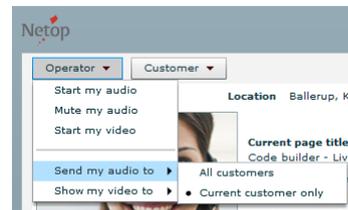
From the **Customer** menu you can choose to let the customer use his or her audio and video.
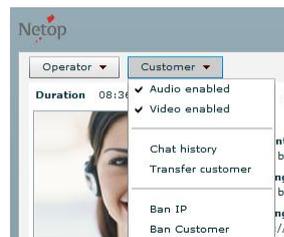
A number of tools are available to assist you during the chat; the tools are available from separate tabs on the **Tools** tab.

3.1 Queue

The **Queue** list is the area where customer calls come in and remain until you or one of the other operators answers them:

Queue (2)	All Customers (2)	Departments (2)	Operators (2)	All (11)				
Name	**Status**	**Proactive**	**Campaign**	**Departments**	**New**	**Page title**	**URL**	
C4234	Queue	Yes	First campaign	Sales	Yes	Cart	http://netop.com	
C4235	Queue		Second campaign	Sales		Cart	http://netop.com	

The **All Customers** list displays all customers who are currently either chatting with an operator or waiting for their call to be picked up.

The **Queue** list, the **All Customers** list, and the **All** list have the same types of information:

Type	This can be "Customer" or "Operator"; the information is particularly useful in the **All** list where both customers and operators are listed.
Status	What the customer is currently doing, for example "Queue" or "Talking".
Proactive	Whether the customer has automatically been invited to chat with an operator.
Campaign	The campaign that the customer called from.
Department	The department that is being contacted or that has answered to call.
New	Whether this customer is a first time caller; can be "Yes" or "No".
Page title	The title of the Web page that the call came from.
URL	The address of the Web page that the call came from.

The **Departments** list displays the departments where operators are currently logged in while the **Operators** list display the names of the operators that are currently logged in. The two lists basically have the same information but present the information from different points of view.

The final list, the **All** list, displays all currently active users, both operators and customers. The types of information are the same as in the **Queue** and the **All Customers** lists.

Note	You can customize the information you see in the queue. See section 5.4 for information about changing the queue.

3.2 Chat area

When you click a customer information line in the queue list, you answer the call and can begin chatting with the customer in the chat area:
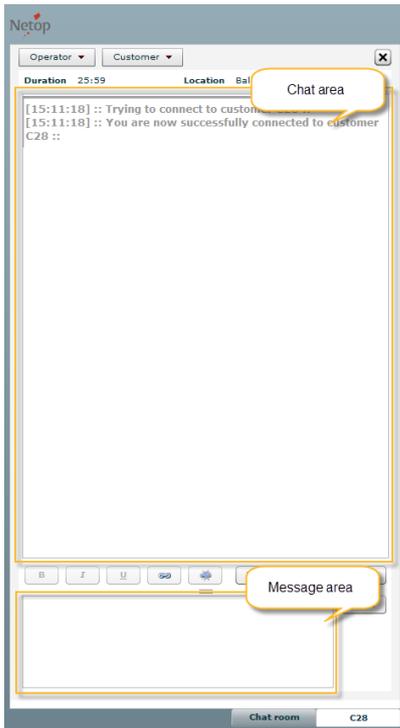
You type your message in the message area and view the chat conversation – both your messages and the customer's replies – in the chat area.

Use the formatting buttons under the chat area to format your text.

Depending on the way your system administrator has configured your interface, a number of tools like for example predefined text and predefined links are available to make your chat conversation easier. See section 3.3 for more details.

If you want to use audio and video instead of text chat, you can turn on your microphone and your camera from the Operator menu. See section 3 for more details.

You can chat with several customers at a time using the **C1, C2**, **C3** etc. tabs to switch between them.

If a customer asks a question that you do not readily know the answer to, you can switch to **Chat room** and ask your colleagues for information. **Chat room** is a chat area that is common to all operators and visible to operators only.

If one of your colleagues is better able to assist the customer, you can transfer the call by clicking **Customer** and then **Transfer customer**.

In case a customer is offensive or otherwise behaves inappropriately, you can prevent the customer from being accepted on the **Queue** list again by clicking **Customer** and then **Ban IP** or **Ban Computer**. The latter option places a cookie on the customer's computer that identifies it whereas Ban IP uses the computer's logical address. You can review banned users and remove bans from **Settings**. See section 5.5 for more details.

Click **Customer** and then **Audio Enabled** or **Video Enabled** to allow the customer to use one or the other. This could for example be useful to temporarily enable sound – maybe to allow the customer to better elaborate on an issue - in a campaign that otherwise has been designed to use chat only.

The chat area includes summary customer information with IP address, geographical location and chat duration; if you need detailed customer information you can switch to the **Customer information** tab. See section 3.5 for more details.

3.3 Tools

The **Tools** tab includes various aids that can make your customer communication easier.

The actual contents of each category on the **Tools** tab vary since it depends on the system administrator's setup but these are the main categories:

Canned Messages These are texts that you use very requently so to save you the work of typing the same text repeatedly, the text has been given a name and defined as a standard text. To use it you select the name of the text from a list and it is automatically written in the text chat to the customer.

Example:

A relevant text for any operator, regardless of department could for example be:

"I'll have to look up the exact information. Please hold on for second."

The text might be named "Please wait" and to write the text to a customer, you would select the name **Please wait** from a list.

The system administrator can define as many texts as are needed and the texts can be grouped so that you can choose to see texts that are relevant to your area only.

Knowledge Base These a basically the same as canned message only knowledge base texts are longer, procedural type texts.

Example:

A relevant knowledge base text for an operator in a support department could for example be:

"To request a new feature, please follow this procedure:

1. Download a feature request form from our Web site.
2. Fill in the form.
3. Send the form to us in an email.

We will get back to you with a response within one workweek."

The text might be named: "Feature request" and to write the entire message to a chat customer, you would select the name **Feature request** from a list.

Like canned messages, the system administrator can define as many texts as are needed and the texts can be grouped so that you can choose to see texts that are relevant to your area only.

Links These are links to Internet sites that you frequently refer customers to. The links work like the predefined texts: the system administrator defines names and links and you select a name to have the entire address automatically added to the chat area.

Push page These are links that you can push to the customer to control what he or she sees on the screen: a new window opens in front of the Website with the call button and because Live Guide is on top of the browser, you can take control and redirect the user to a new URL.

Forms

These are forms that you can ask the customer to fill in to collect information in a structured way. For example, if you belong to support department, the information could be about the date of purchase, the name of the reseller, the serial number, and a description of the error situation. Or for customer asking for a trial download, you might want to collect some information before providing the download link.

To push a form to the user:

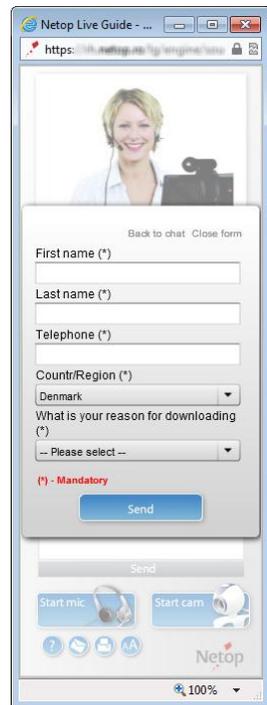1. On the **Forms** tab, double-click the name of the form you want to push.

   The form is now listed in your chat area by its internal name, for example "/form 3".

2. In the chat area, click the **Send** button to push the form.

Though you see the form as "/form 10304", this is what the form might look like to the customer:

Depending on the campaign settings that your system administrator has defined, the customer's input may be sent to you in and email or directly to the chat area as plain text, for example:

08-04-2011 13:56:10
Amanda(14:00:09): /form 10304

[13:59:57] :: Trying to connect to customer C0 ::
[13:59:57] :: Trying to connect to customer C0 ::
[13:59:58] :: You are now successfully connected to customer C0 ::
[14:00:04] :: Sending form Free trial ::
[14:02:43] C0: First name: Peter
Last name: Johnson
Telephone: 12345678
Country/Region: United Kingdom
What is your reason for downloading: Use free trial

3.4 Operator status

When logged on you default status is **Available** but you can set it to **Busy** if you are temporarily unable to take customer calls:

When your status is **Busy**, you will not count as a resource when customer waiting time is calculated.

Note that if all operators set their status to **Busy** the call button will automatically have status offline.

3.5 View detailed customer information

If you need more details than is available in the summary customer information in the chat area, you can find additional information on the **Customer Information** tab:

IP	89.35.54.249
Time on site	43 seconds
City	Chicago
Region	Illinois
Country	United States
ISP	Qwest Communications
Domain	netop.com
Organization	Netop
Landing Page Title	Netop: Secure remote control, classroom management & communica
Landing Page URL	http://www.netop.com/
Current Page Title	Netop Live Guide: Rich Media Chat - Video, Voice, and Text
Current Page URL	http://www.netop.com/live-guide.htm
Keywords	rich media chat
Proactive Chat	No
Operating System	Windows 7
Browser Type	Mozilla Firefox
Browser Version	3.6.6

Customer Details Customer details include many types of information, among them information about previous calls, the operator who handled the last call, the campain the customer called on, and the customer's domain and organization.

The detailed customer information can be used for a number of purposes, for example to trace customers that you would like to follow up on or to be able to provide better assistance based on your increased background knowledge.

Keywords include information about how the customer landed on the page with the call button, for example through keywords

from a search engine like Google.

The information can be exported and also sent to an email address. This can be useful for subsequent follow-up on the customer, for example a reminder to contact the customer later.

Chat History

The **Chat history** tab shows all previous contacts with the customer, including any notes you or another operator may have made as well as the reason the customer called (**Category**).

The information can be exported and also sent to an email address. Like for the customer details described above, this can be useful for subsequent follow-up on the customer.

Notes

Notes that you or another operator made for previous calls as well as a text edit area that allows you to make notes to the current call.

The information can be exported and also sent to an email address as an indication that follow-up on the customer is needed.

Categories

Categories are used to indicate the topic of a customer call and can later be used to generate statistics. For example, for operators from the support department, categories could be product names; for operators from a sales department, the category could also be product names or it could be "demo", "existing customer", or "potential customer".

The system administrator may set up the system so that it is mandatory to select a category before a call can be properly ended. If this is that case, you must select one of the categories from the list before your status changes to available.

4 Use logged data

In your everyday work you will typically use the tools and features described in the section above. However, occasionally you may need to review past customer calls or generate call reports. To do this you can click the **History** button and switch from real-time view to historical view:

In the history module you can view logged data, use filter criteria and export to a file or send to an email recipient.

4.1 Use filters to get the report you need

When you click the **History** button, information about all calls recorded by the system is displayed in a list format. You can browse through the list and for the current conversation see the chat log and any notes made by the operator.

Typically though you will likely want to filter the information to limit the data you see. You can do this by filtering on:

- A specific session.
- Sessions within a date range.
- Sessions handled by a specific department.
- Sessions from a specific category.

- Sessions that include specific keywords

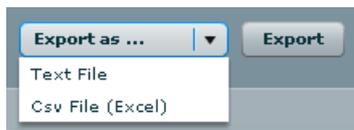The filter criteria can also be used in combination.

Select the filter criteria you want to use in the **Range** section and click **Filter** to apply them to the list:

4.2 Export report data

When you have generated a filtered report, you can export it to an external file for further processing.

- Click the **Export as** button to select a file format, and then click the **Export** button.

If you selected **Csv File (Excel)**, the file opens in Microsoft Office Excel and it you selected **Text File**, it opens in Notepad. From either of these programs, you can then choose to save the file locally.

4.3 Send logged data to an email recipient

Instead of exporting to a file, you can also choose to send the report to an email recipient.

- Type the recipients email address and click **Send**.

The reported data is pasted as text into the email.

5 Customize how Live Guide operator console works

You can customize how Live Guide operator console works within these areas:

- Your account.
- When you receive alerts.
- Layout of the chat area and the queue.
- Fields and colors in the queue and fields in the video area.
- Font size and text color in the chat window and in the queue.
- Restrict customer access.

Any changes to how the operator console work is done by clicking the **Settings** button:

5.1 Change your account settings

When you first log on to Live Guide operator console, you do so with an email and a password and you will typically be requested to change your password on your first logon.

If you later want to change your password, you can do so from the **Account** tab.

Display Name is the name that the customer sees in a chat conversation. You can also change this here.

5.2 Change settings for how you want to be alerted

You can use the **Alerts** tab to define whether you want to be alerted with a sound, by a text change in the title of the current page, or by a combination of the two.
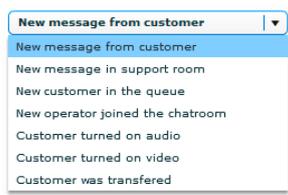
- Select an event in the list, then select how to be alerted, and click **Save**.

5.3 Change the layout of the chat area and the queue

By default the operator console reserves a large part of the available screen real estate for the chat window since this is where you will interact with customers.

If you have added customer information columns that are essential to your work to the queue, you may want to have a larger queue area at the expense of the chat window.

This can be changed from the **Layout** tab: Click **Large queue panel** to change the default.

5.4 Change the queue and the video area

The comprehensive data that Live Guide collects on all customers is available from the **Customer information** tab when a call is in active. Some of this information is also available in the queue but if other fields would be more useful to you, you can set up your queue list differently:

- Select fields from the **Available fields** list using the **Add**/**Remove** buttons between the two lists.
- Sort the files in the **Selected fields** list using the **Move up**/**down** buttons to the right of the list.

Click **Save** to make your changes permanent; you can always switch between **Calls** and **Settings** to review the effect of your changes.

The video area is the area above the chat area. When neither you nor the customer is using video, the area shows your picture or a standard picture.

Next to the video or the picture four information fields are available.

If you would like different information fields in the video area, select from the **Available fields** list.

Note that the limited space available means that you can select a maximum of four fields.

5.5 Change font size and text color

Use the **Fonts** tab to make the chat window and the queue panel match your reading needs.

For the chat window you can increase the font size and choose a different color for each type of text that can appear in the chat window. This can make it easier to distinguish between the texts a customer types and your own texts.

For the queue you can choose different colors for different states. This can make it easier to distinguish, for example, waiting customers and available operators.

5.6 Ban customer

When you are working in the operator console online environment, you might occasionally ban a customer who behaves inappropriately. As mentioned in section 3.2 you can do this from the chat area while online with the customer.

You can use the **Banned Customers** tab to see a complete list of customers who cannot currently contact any operator console operators. If the operator who imposed the ban added comments, the list will also list the reason for the ban.

To remove a ban:

- Select a row in the banned customers list and click the **Remove** button.

You can also ban a customer from the **Banned Customers** tab.

To ban a customer:

1. Type the computer name or the IP address that you want to ban.

   Any bans you set here are effective from subsequent calls; a ban that you set from the **Options** button in the chat area is effective instantly.

2. Type a reason why you want to ban the customer and click the **Save** button.

The new ban is added to the list of banned customers.