

NETOP™

Live GUIDE™

Rich Media Chat for Your Web Site

System Administrator's Guide

Version 5.0

Contents

1	Netop Live Guide	3
2	Create a call button	3
2.1	Create departments	4
2.2	Add operators.....	4
2.3	Create forms	5
2.3.1	Form example I: download request form.....	7
2.3.2	Form example II: ski rental information.....	8
2.4	Create operator tools.....	10
2.4.1	Predefined texts: Canned messages and Knowledge base	11
2.4.2	Links: Links and Push page	11
2.4.3	Forms.....	12
2.4.4	Categories	12
2.5	Create texts for call button.....	12
2.6	Define time settings	14
2.7	Create a campaign	14
2.8	Define settings for proactive chat.....	15
3	Automatically create code for a call button.....	16
3.1	Create call button code for a Web site	17
3.1.1	Checklist: Enable call button and proactive chat	18
3.1.2	Restrict the call button to specific domains.....	18
3.2	Create a call button link for an e-mail campaign	19
4	Enabling operators to log on to take calls.....	19
5	Manage calls	20
6	Using statistics	22
7	Using customer data	22
8	Glossary	24

1 Netop Live Guide

This guide describes how system administrators should configure Netop Live Guide and gives a brief overview of operator options.

System administrators are the users who have full access to all features so that they can set up the system. In the implementation phase, system administrators have these tasks:

- Create call groups, ensure that operators are created as users, create tools for operators and generate the code for the Web site call button or the hyperlink to open chat.
- Ensure that the code for the Web site call button is implemented on the Web site.
- Send logon information to the operators who are going to answer customer calls.

When a call button has been operational for a period of time, system administrators can review logs of all calls and produce extensive statistics to verify and document system performance and campaign effectiveness.

Operators are the users who handle calls from customers who request information or assistance by clicking a Web site call button. Customer calls are listed in a global call list according to call group so that operators only see calls that are relevant to them. When an operator selects a call, an instant messaging session with the customer is started. The operator can

- Communicate with the customer using text chat, or switch to audio and video.
- Transfer the customer call to another operator.
- Use the tools that the system administrator made available.

When the instant messaging session starts, the operator automatically sees the chat history if the customer has called previously.

Sections 2, 3, 5, 6 and 7 describe system administrator tasks while section 4 gives an overview of the operators' options.

2 Create a call button

Creating a call button to place on your company Web site consists in creating components that a call button can use, and in determining how these components should be put together.

These components are the necessary building blocks:

- Departments
- Operators
- Tools
- Language presets

A department corresponds to a call group. You will only need more than one department if you want to direct your customers to specific operators. In the examples below, we will be using two departments: "Sales" and "Support".

Operators are the users who will be handling customer calls.

Tools consist of different types of aids that you can create to help operators be more efficient, for example predefined texts and predefined links.

Language presets are the texts that the customer will see in the interface, like for example "Thank you - we have received the form you sent us". You can base your language presets on default texts that you can then customize.

In addition to these mandatory building blocks, you may also choose to create one or more forms that operators can ask customers to fill in, or that can be presented to the customer before or after operators answer a customer call.

When these building blocks have been defined, you can create a campaign. A campaign is associated with one or more departments and uses the texts defined as language presets. Other campaign parameters include the time period in which the campaign is active, the online and offline hours and the actual image used as the active call button.

In the following sections, we will be using a software company as an example. The company would like their customers to be able to contact their Sales department and their Support department.

2.1 Create departments

On the **Setup** menu, click **Departments** and then the **Add new** button:

Add a department for each group of operators that will be taking calls, for example "Sales" and "Support".

The list of departments could then look like this:

Name	Description	Date created
Sales	Entire sales team, EMEA and US	N/A
Support	Support for all products	N/A

2.2 Add operators

On the **Setup** menu, click **Operators** and then the **Add new** button:

The name is the user's actual name while the display name is the name that customers see.

The e-mail is used for logon purposes only and is not visible to customers.

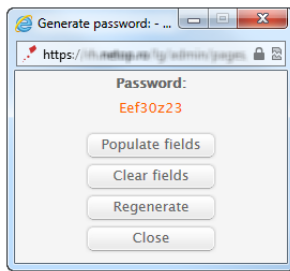
A secure password can be generated using the **Generate password** link.

Operators use e-mail and password when they log on to take customer calls. They will be requested to change their password on their first logon so you can start by using the same password for all operators, for example your company name followed by 123. This also makes it simpler for you to send the login email as you can let everyone know to use their email and company name followed by 123 to access the operator console.

The skills list can be used to register skills for individual operators.

Tip: Make sure you maintain a list of operators and their passwords

When you click the **Generate password** link to automatically create a secure password, a small dialog box opens:



Before you click **Populate fields** to automatically paste the password into the **Password** and **Confirm password** fields, make sure to copy the secure password to a list of operators and passwords that you can maintain in for example Word or Excel.

Once the password is copied to the appropriate fields, it is represented with dots and is no longer legible.

Add all operators who will be taking customer call. The list of operators could then look like this:

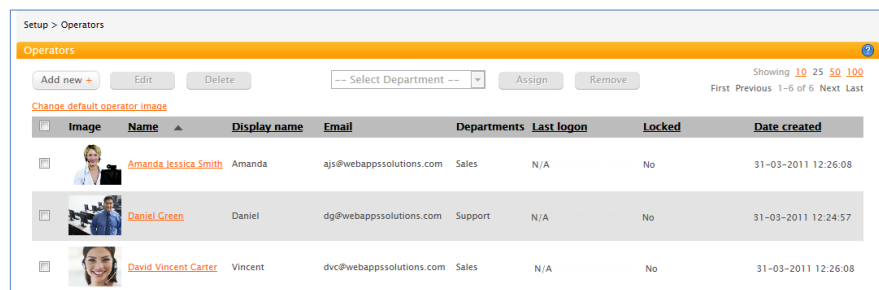





Image	Name	Display name	Email	Departments	Last logon	Locked	Date created
	Amanda Jessica Smith	Amanda	ajs@webappssolutions.com	Sales	N/A	No	31-03-2011 12:26:08
	Daniel Green	Daniel	dg@webappssolutions.com	Support	N/A	No	31-03-2011 12:24:57
	David Vincent Carter	Vincent	dvc@webappssolutions.com	Sales	N/A	No	31-03-2011 12:26:08

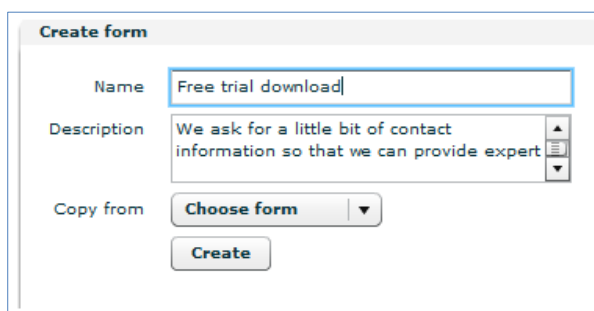
The last operator in the above list uses the default picture. This can easily be changed by selecting the operator and clicking the **Edit** button

Use the link at the top of the page to use a different default picture.

2.3 Create forms

Forms are optional building blocks when you create a call button and can be viewed as a structured way of collecting input from customers visiting the company site. For example, in our software company example a form could be used to collect information from customers who request a free trial download. In this case the operator would likely want to push the form to the customer during a conversation but forms can also be pushed before the conversation begins, after the conversation has ended, or during out of office hours when no operators are available to answer customer calls.

On the **Settings** menu, click **Forms editor** and use the fields to the right to start creating the new form:



In the right side of the page, type a suitable name and a description that can help you identify the form purpose.

Once one or more forms have been created, you can use **Copy from** to have a new form created based on an existing one.

When you click **Create**, the form designer opens with the new, empty form and you can start adding fields:



The form designer has three components:

- **Design view:** when you start adding fields to your empty form, the design view shows the fields on the form and lets you change the sequence of fields.
- **Manage form:** while you are adding fields to your form, you will want to use this section to save occasionally and also to get a preview of what the form will look like to the user. When you have completed the form, you will want to edit form settings to define how the user input should be handled.

Please note that changes to a form are not saved until you click **Save** in the **Manage form** section.

- **Add entries:** this is where you add fields and static components like text and space to your form.

Entry types

- To add a field to a form, select the relevant type of entry and then click **Add**.

These are the available entry types:

Text field A text field is a single-line input area where the user can type any text.

A text field could for example be used for an input field where the customer types his or her name.

Text area A text area is a multi-line input area where the user can type any text.

A text area could for example be used for an input field where the customer can type free text comments.

Drop-down A drop-down list allows the user to choose a value from a list.

A drop-down list could for example be used to have the customer identify the country he or she is from.

Check box A check box allows the user to make multiple selections from a number of options.

A check box could for example be used to have the customer request information materials on a number of different products.

Option button group An option button group allows the user to select only one out of a predefined set of options.

An option button group could for example be used to have the customer indicate which business area he or she is in.

Text Text is static text that does not allow for user input. Formatting options like font, font style, font size, font color and alignment are available for static text.

Text could for example be used to provide information to the user.

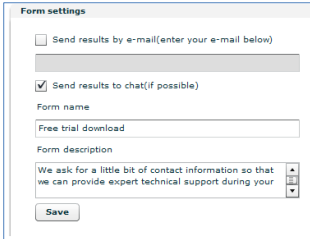
Spacer

Spacer is an indication of space between two entries on a form. The actual space is given in pixels.

A spacer is used for basic formatting to ensure that the customer has a good overview of the fields and information on the form.

Form settings

- In the **Manage form** section, click **Edit settings**.



Select how you want to receive the input that the customer has provided in the form.

Note that these options are *in addition* to the standard logging of form input; form input will be logged and be available for later analysis by the system administrator even if you do not select any of the available options.

By e-mail

If you select to receive input by e-mail, you must specify a valid e-mail address. This could for example be a joint operators' mailbox that is checked at regular intervals.

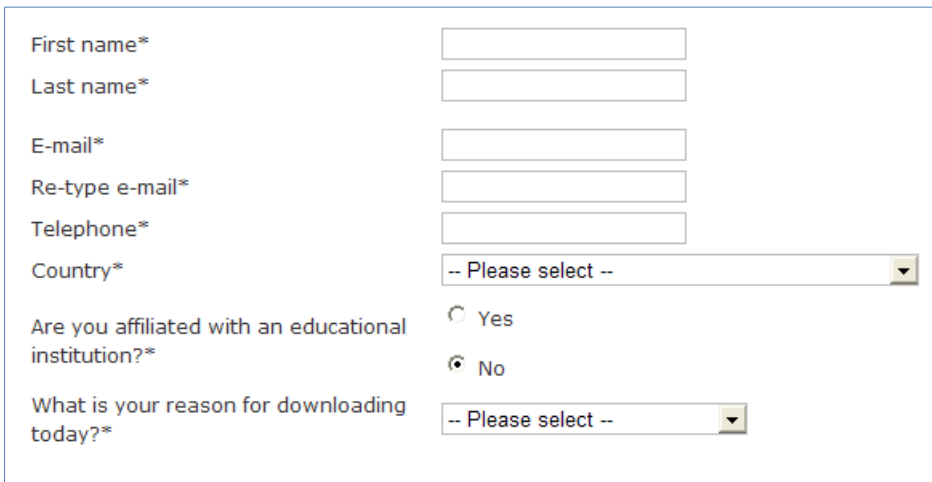
To chat

Sending the customer input to the operators chat is possible only when the form is used in a situation when an operator is actually logged on, that is in situations when a form is presented to a customer before a chat is opened or when the operator pushes a form to the customer. When a form is presented to a customer *after* a chat session or outside office hours when no operators are available, the form input cannot be sent to the chat.

2.3.1 Form example I: download request form

Say you wanted to create a simple form requesting basic information from customers who want to download free trial software.

When requesting a download via a Web page, the form might look like this:



So these are the types of information you want to collect using a Live Guide form.

In Live Guide, this might translate into the following form when the customer sees it before, during or after a chat conversation:

Back to chat Close form

First name (*)

Last name (*)

E-mail (*)

Re-type e-mail (*)

Telephone (*)

Country
Australia

Are you affiliated with an educational institution? (*)
 Yes
 No

What is your reason for downloading today? (*)
30-day trial

(*) - Mandatory

Send

The screen shot below shows the same form in design view. The field with the yellow box round it is the current one and its properties are shown under **Edit field**:

Settings > Forms editor

Forms editor

Design view: "Free trial"

Re-type e-mail (*) Reorder Edit Remove

Telephone (*) Reorder Edit Remove

Country Reorder Edit Remove
Australia

Are you affiliated with an educational institution? (*) Reorder Edit Remove
 Yes
 No

What is your reason for downloading today? (*) Reorder Edit Remove
30-day trial

Manage form Save Preview Edit settings
Back to existing forms

Add entries
Field Text field Add

The form fields are:

- Four text fields (first name, last name, e-mail, telephone)
- Two drop-down fields (country, reason for downloading)
- One option button group (affiliation with educational institution)

2.3.2 Form example II: ski rental information

Another example where you might choose to use a form could be to collect information from a user looking to rent something, for example skiing equipment.

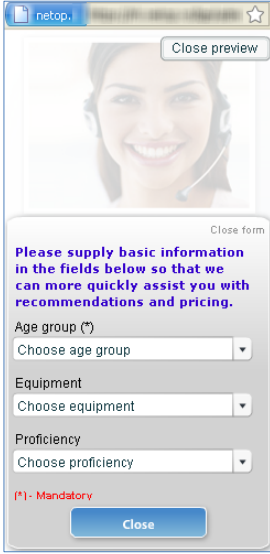
On the company Web site the information might already be collected in drop-down lists like the ones below:

Adults (16+ years) Alpine Select level

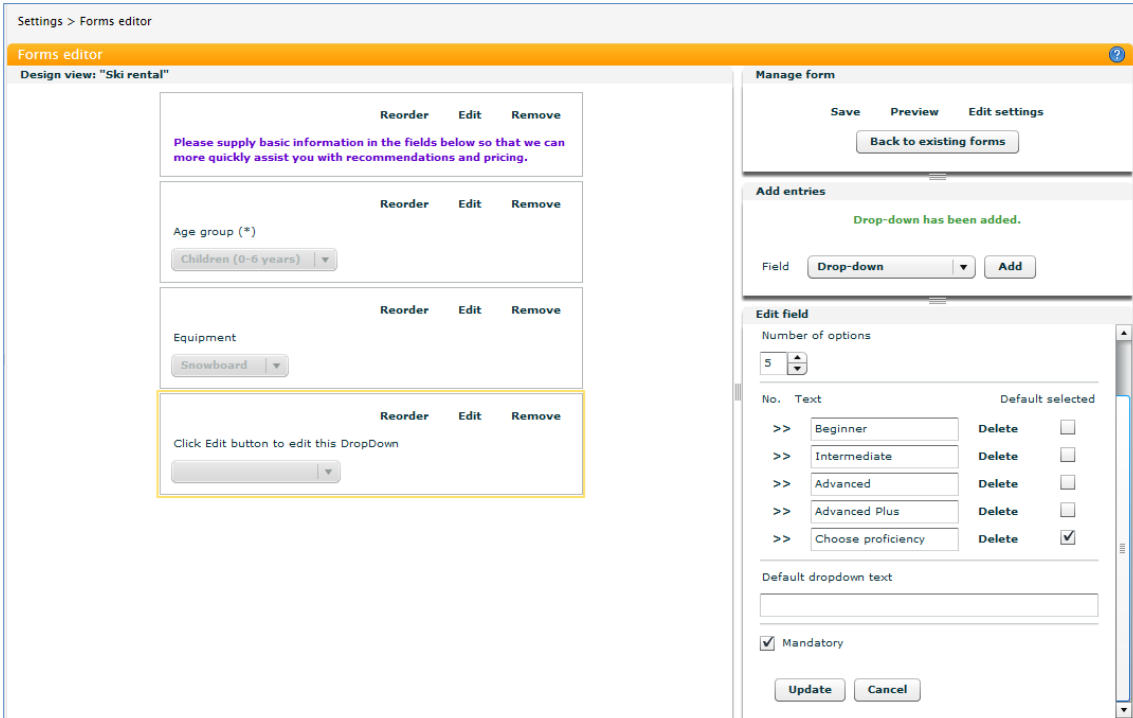
If a customer chose to contact a company sales representative through a Live Guide call button instead of booking online on the company Web site, it might be useful with a form to collect the same information.

In Live Guide, the form might look like this:

The Live Guide operator, in this example likely a sales representative, can choose to push the form to the customer if and when relevant in the conversation.



The screen shot below shows the same form in design view. The field with the yellow box round it is the current one and its properties are shown under **Edit field**:

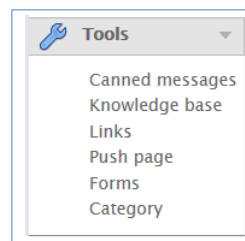


The form fields are:

- One text area (the explanatory, fixed text)
- Three drop-down fields (age group, equipment, proficiency), only one of which is mandatory

2.4 Create operator tools

Tools for operators are created from the **Tools** menu:



The tools fall into four different categories:

Predefined texts

- Predefined texts are defined clicking either **Canned messages** or **Knowledge base**.

Both tools are texts that are created to help the operator when in a chat conversation: instead of typing a text, the operator can select the name of a text and the customer then sees the complete text. The difference between the two is that **Canned messages** are short texts, like greetings when a customer joins while **Knowledge base** are longer, procedure-related texts. In our software company example, a **Knowledge base** text might explain how customer should make a feature request.

Also, the **Canned messages** would typically be general texts that are can be used across departments while **Knowledge base** texts would likely be department-specific.

Links

- Links are created clicking either **Links** or **Push page**.

A link under **Links** is a standard Web link that directs the customer to another Web site.

A link under **Push page** is a way to control the Website behind the Live Guide window. The Live Guide opens in a new window in front of the Website with the call button. Because the Live Guide is on top of the browser the operator can take control and redirect the user to a new URL

Forms

The forms previously created in the **Forms editor** section are associated with departments from **Forms**.

Categories


Categories are used to specify the overall topic of customer calls, like for example "Presales demo" or "Meeting set up", and are useful for statistical purposes.

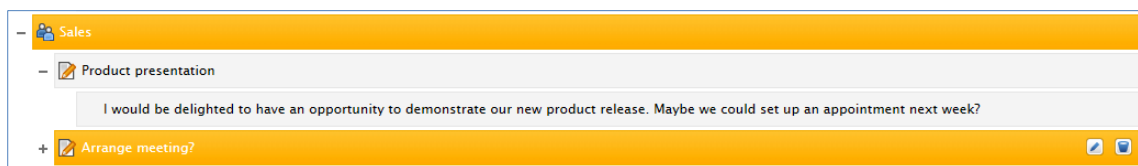
Even though they are very different in nature, the operator tools share these characteristics:

- Tools are defined separately for each department since, for example, the Support and the Sales department will typically need different tools. On the other hand tools can easily be copied from one department to another in scenarios when one department's tools should be based on what has already been defined for another department.
- Tools can be organized in a folder structure which is tailored to the department. For example, if the Support department typically used predefined texts that relate to product support and to product download, the **Canned messages** for the Support department could be organized in those two folders.

None of the tools are mandatory but can help operators be more efficient.

2.4.1 Predefined texts: Canned messages and Knowledge base

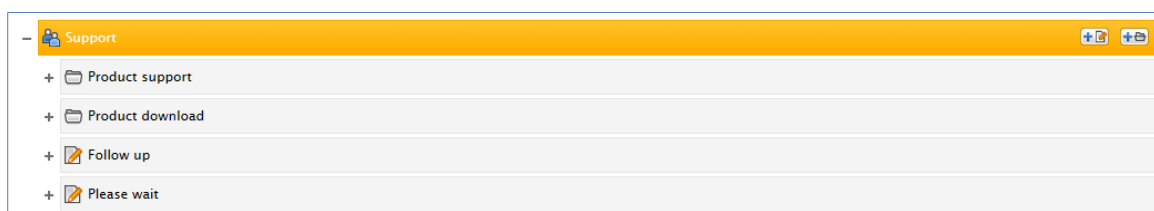
On the **Tools** menu, click **Canned messages** and then click the **Add new entry** button  for the department you want to create a text for.



The operators from the Sales department will see the name of the Canned message (in the above example "Product presentation" and "Arrange meeting") and when they select the name of the text when in a chat session, the entire text will be shown to the customer.

If you plan to create a large number of canned messages for a department, you can create folders to have the messages group. In the above example, folders have not been used.

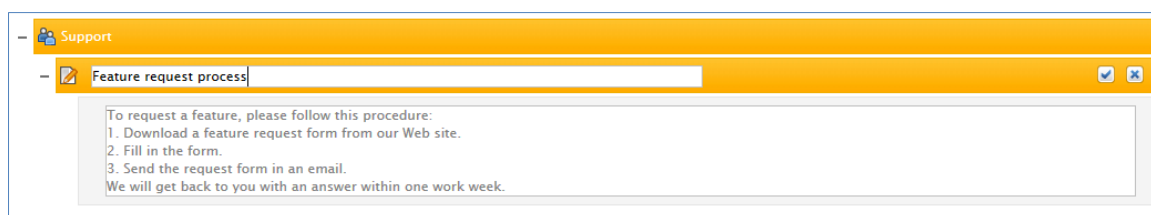
The canned messages for the Support department are different and because several types of texts are planned, folders have been created to organize the texts in categories.



Note that folders and texts can be copied from another department.

Add as many canned messages as the operators need; when the need arises, more texts can be added.

If operators frequently need longer, procedural texts such texts would typically be defined clicking **Knowledge base**. For example, if operators from the support department frequently tell customers how to make a request for a new feature, the entire procedure text could be defined as part of **Knowledge base**:



Add as many procedure texts as the operators need. If the Sales department needs the same texts that have already been defined for the Support department, the texts can be copied.

2.4.2 Links: Links and Push page

Links and Push page are both links but of different types:

- A Link is a standard Web link that directs the customer to another Web site.
- A Push page is a way to control the Website behind the Live Guide window. Live Guide opens in a new window in front of the Website with the call button. Because the Live Guide is on top of the browser the operator can take control and redirect the user to a new page.

To create a link, regardless of type, you type a name and a Web address, for example:



Operators will see the name of the link and when they select the name in a list, the actual link will be sent to the customer.


Note that including http:// in the actual address is mandatory.

If you create many links for the operators, organizing them in folders might be a good idea.

Like **Canned messages** and **Knowledge base** items, **Links** and **Push page** are created separately for each department.

2.4.3 Forms

Click **Forms** on the **Tools** menu to make the forms that you previously created available to the departments that will be using them.

Select a department and then add existing forms using the **Add New Entry**  button:



Forms work like the other tools with respect to organization: you can add folders to improve the operators' overview if you want to assign many forms to a department.

2.4.4 Categories

Categories constitute the last tools component. Categories are used to specify the overall topic of customer calls and are useful for statistical purposes.



You can define as many or as few categories as you need, for example:



As part of defining categories for a department, you also define whether the use of categories is mandatory. If you choose to make categories mandatory within the department, operators from that department cannot end a customer call until they have selected a category.

2.5 Create texts for call button

The final component necessary to create a campaign is definition of the texts to be used on the call button interface.

Note that a complete default language preset is available and could potentially be used as is. However, this is not recommended practice and hardly realistic as the default

language preset includes information that should be customized, for example company name and opening hours.

On the **Settings** menu, click **Language presets**:



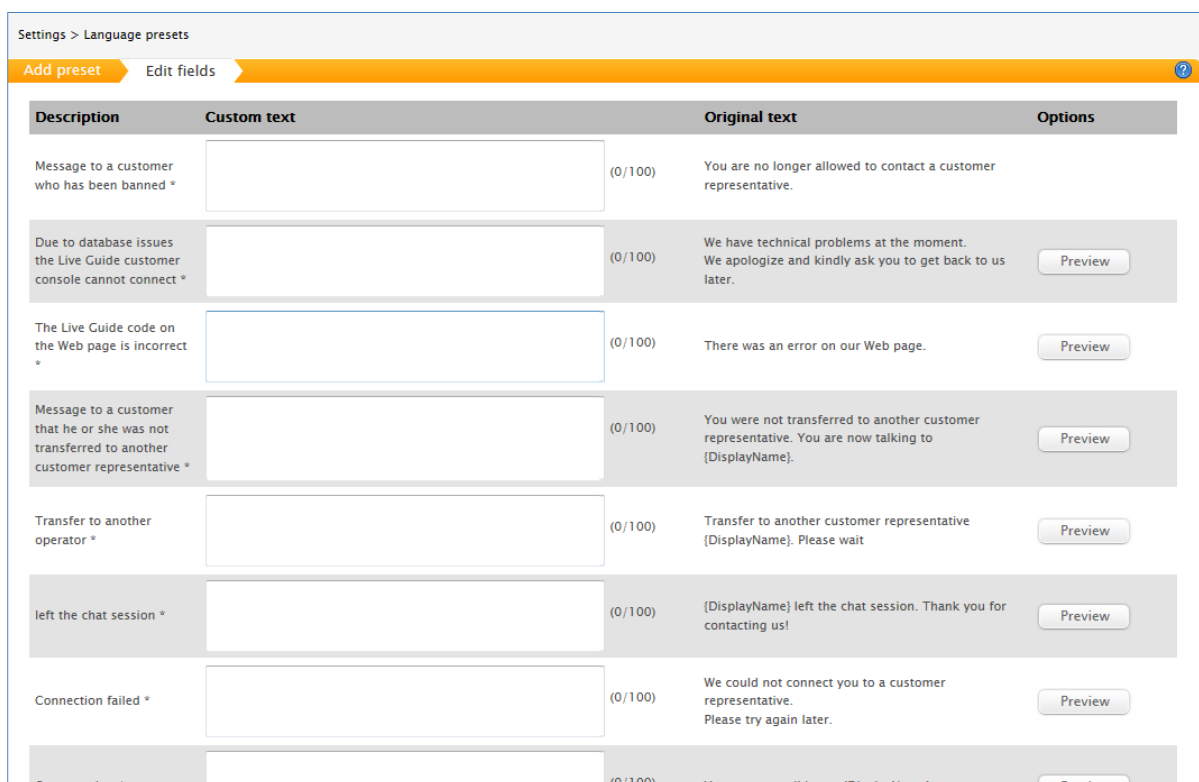
Select one of the existing sets of text and click the **Duplicate** button to create a copy that can be modified.

Type a name that you will use to identify the campaign, for example "Sales and Support". You could then later choose to create separate campaigns for "Sales" and "Support".

The description is just an aid to identify this campaign when you have eventually created several.

The **Edit Fields** page is a complete list of all texts that customers will see on the call button user interface or in any interaction with Live Guide.

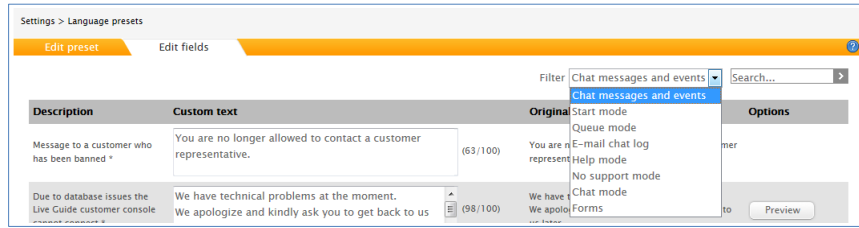
- The **Description** column explains where or when the text is used.
- The **Custom text** column is where you can write your own text. Note that the numbers in parenthesis, for example "(67/100)", indicated that 67 out of a maximum of 100 characters have been used.
- The **Original text** column is the text from the system's language preset. You can copy this text, paste it to the custom text and then edit as you see fit.
- The **Preview** button shows how the customer will see the text one the call button has been implemented.



Tips We recommend that you experiment with the various text options and use the

Preview button to get an impression of the look and layout.

Once you have created your own language preset, you will notice that a filter is added that enables you to review and edit the texts in shorter lists:



2.6 Define time settings

All campaigns that you create and operate using Live Guide use the same time zone setting. The time zone setting impacts all time stamps used in Live Guide and hence all logged data and all statistics. To see or change the current time zone:

- On the **Settings** menu, click **Time settings**.

We recommend that you set the time zone to your local time zone and that you do not change time zone once you have active campaigns.

If you change time zone when you have started collecting data from one or more active campaigns, time stamps are automatically changed in logged data, form results and statics.

In addition to time zone, you can also set your preferred date format. This setting also impacts all date and time stamps and, like time zone, it should be set prior to launching campaigns.

2.7 Create a campaign

When you have created departments, users, forms, tools, and language presets as described in the above sections, you have all the building blocks for setting up a campaign.

On the **Setup** menu, click **Campaigns** and then the **Add new** button.

Provide the required information and click the **Next** button to go to the next page.

Campaign tips

- **Offline and online images:** The offline and online images can be JPG or GIF format; to generate attention, an animated GIF can be used. The offline and online graphics should be distinct so that customers can clearly see when the chat is open.

There are no size requirements or restrictions. The image look is essential for the success of your campaign with respect to how many calls customers make: customers must be able to immediately recognize the button as a clickable area.

- **Opening hours:** The weekdays and hours are the periods when the campaign is active and users can contact the departments have been added to the campaign. For a campaign to be active when one or more operators are available, set the opening hours to "Open all hours". If no operators have logged on, the campaign is automatically offline.

When your campaign has been defined, you might decide that Live Guide should initiate a chat with any customer who stays on the campaign page for, say, 2 minutes. This is set up **Proactive chat** on the **Settings** menu; refer to the section entitled "Define settings for proactive chat" for details.

2.8 Define settings for proactive chat

When you have created a campaign, you can choose to have Live Guide take proactive action when a customer has been browsing the page with the call button for a period of time.

Note that before you can define proactive chat, you need to make sure that you have:

- Created a department.
In the above example we created the departments "Sales" and "Support".
- Added at least one operator from each department.
In the above example we added operators to both departments.
- Created a campaign and added the departments.
In the above example we created the "Sales and Support" campaign.

Define proactive chat

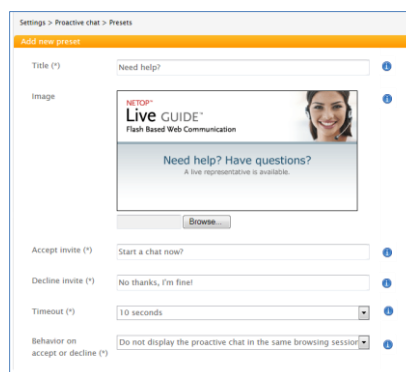
Defining proactive chat is a two step process:

1. Define proactive chat settings like whether the proactive chat should open in a new window, how long the customer should spend on the page before he or she is contacted, and a greeting text.
2. Specify the campaign and the Web pages where proactive chat should be enabled.

The fact that the setup is split up in two steps means that you can define proactive chat settings that are always used and then choose specifically the campaign and the pages where chat should be proactive so that you can potentially have pages where proactive chat is not enabled.

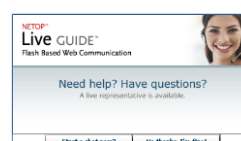
Settings

On the **Settings** menu, click **Proactive chat** and then the **Add new** button to define the proactive chat settings:



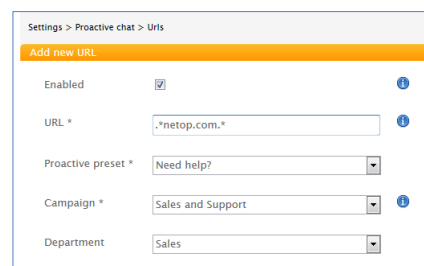
The screenshot shows the 'Settings > Proactive chat > Presets' interface. It features a form to create a new preset. The fields include: Title (*), Image (with a 'Browse...' button), Accept invite (*), Decline invite (*), Timeout (*), and Behavior on accept or decline (*). The 'Need help?' preset is selected, showing a preview of the chat bubble with the text 'Need help? Have questions? A live representative is available.' and a 'Start a chat now?' button.

With the above settings, the customer would see an image like the one below floating in on the Web page after 10 seconds of browsing:



Web pages

On the **Settings** menu, click **Proactive chat**, the **URLs** tab and then the **Add new** button to add the Web pages where the proactive chat should be active:



The screenshot shows the 'Settings > Proactive chat > URLs' interface. It features a form to add a new URL. The fields include: Enabled (checkbox), URL (*), Proactive preset (*), Campaign (*), and Department. The 'Enabled' checkbox is checked, and the URL is set to '*.netop.com.*'. The 'Proactive preset' is set to 'Need help?', 'Campaign' is 'Sales and Support', and 'Department' is 'Sales'.

In the example from the previous sections, you might want to add the page that customers are accessing when they are considering to download a free trial: If customers hesitate on the page, this might indicate that they have questions or concerns related to the information they are requested to submit and it might be an idea to start a chat and figure out if they need assistance or information.

To enable proactive chat on multiple pages, you can use the wildcard character "*" (full stop plus the wildcard character), for example:
.netop.com.

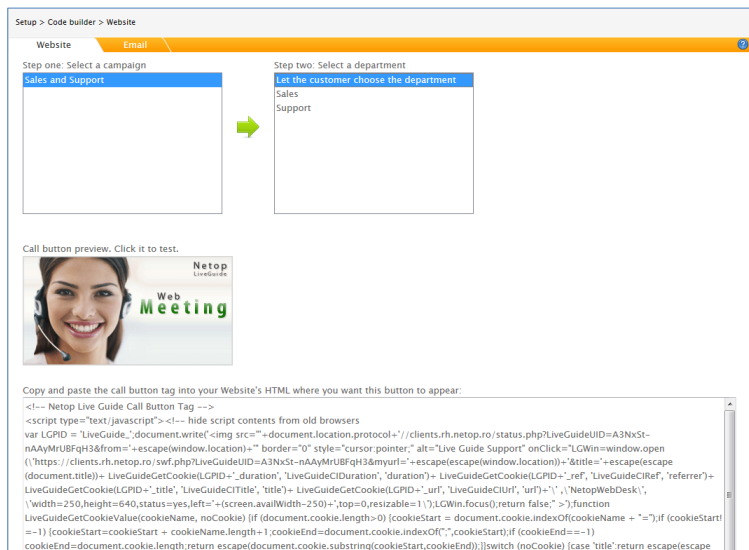
3 Automatically create code for a call button

When you have created the components that a call button uses and put them together in a campaign, Live Guide is ready to automatically create call button code to upload to a Web site.

You can also choose to have Live Guide automatically create a link that opens a call button from an e-mail or from any other Web site like a forum or online advertising where placing call button code is not practical.

3.1 Create call button code for a Web site

In the **Setup** menu, click **Code builder** and follow the steps on the page: select a campaign, select department and copy and paste the resulting code which is generated automatically:



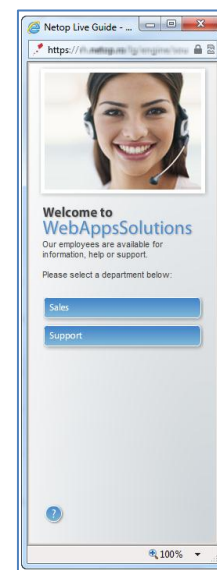
The image is a live preview of what the customer will see on the Web site: click the image to see what the customer will see when clicking the actual button on the Web site.

To see the call button in *online* mode you need to make sure that:

- An operator from one of the departments that answers calls is logged on (click the link on the **Operator console** page and log on with operator name and password).
- The campaign is active (check the campaign start and end date from the **Campaigns** page).
- The current time is within the campaign opening hours (check the campaign schedule from the **Campaigns** page, under **Edit campaign > Opening hours**).

The call button will display in offline mode when the above conditions are not met.

Tip If all customer calls should go *directly* to one department, for example the Support department, this is easily changed by selecting "Support" in **Step two: select a department** on the **Code builder** page.



Your task is to copy the two snippets of code and make sure they are placed in the appropriate places on the Web site by the Web site administrator.

The snippet with the heading **Netop Live Guide Call button tag** must be placed on the page where you want the call button to show.

The snippet with the heading **Netop Live Guide Monitor tag** enables proactive chat as well as collection of complete customer information and must be placed **on all pages on the site**. This could for example be achieved by placing the code in the site's footer section to ensure that it is available on all sub-pages in the site hierarchy.

3.1.1 Checklist: Enable call button and proactive chat

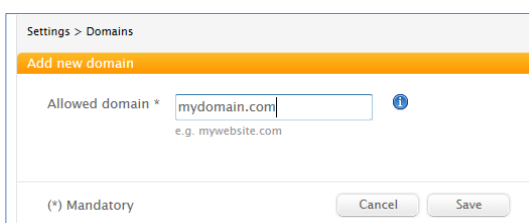
To enable the call button in online mode and to make sure that the proactive chat invites browsing users to chat verify the following:

- A proactive chat preset has been created (on the **Settings** menu, click **Proactive chat** and verify that a preset is available in the list).
- The relevant URL has been added to the proactive chat page listing (on the **Settings** menu, click **Proactive chat** and then the **URLs** tab and verify that your company URL is in the proactive chat page listing).
- The code snippet that enables the proactive chat are placed *on all pages on the site*.
- An operator from one of the departments that answers calls is logged on (click the link on the **Operator console** page and log on with operator name and password).
- The campaign is active (check the campaign start and end date from the **Campaigns** page).
- The current time is within the campaign opening hours (check the campaign schedule from the **Campaigns** page).

3.1.2 Restrict the call button to specific domains

As described in the sections above, the call button is active on a Web site when the code that Live Guide generates is placed in the appropriate place on the company Web site. To add a further level of security from any malicious attempts to copy code or redirect customer calls, you can choose to specifically define domains where the call button code is allowed to be embedded.

On the **Settings** menu, click **Domains** and then the **Add new** button:



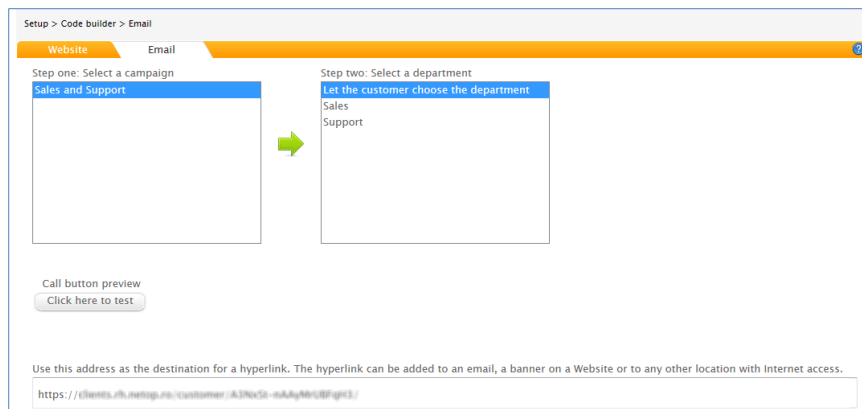
Until you specify a domain, the call button code will work on any domain where the code is appropriately placed.

Once you have added one or more domains, you have added domain control and hence domain restrictions to your call button. The goal is enhanced security but you should take care that you do not unintentionally block the call button from being displayed.

An example: if you add the domain called "mydomain.com" this means that the call button code that enables display of a call button can run only from this domain and subfolders within that domain. Even if the code is physically copied to another domain, for example "myotherdomain.com", the call button will not be displayed on this domain and consequently customers cannot use it.

3.2 Create a call button link for an e-mail campaign

In the **Setup** menu, click **Code builder**, then the **Email** tab and follow the steps on the page: select a campaign and a department:

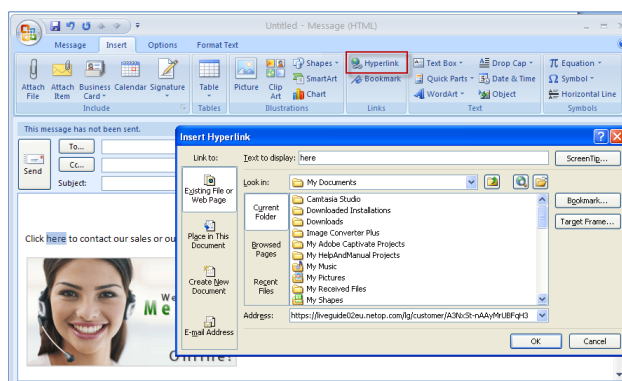


Use the **Click here to test** button to see a preview of what the customer that you send this link to will see.

The link that will open a call button is automatically generated. Since this is a standard https-link it will work in all browsers and from all e-mail clients.

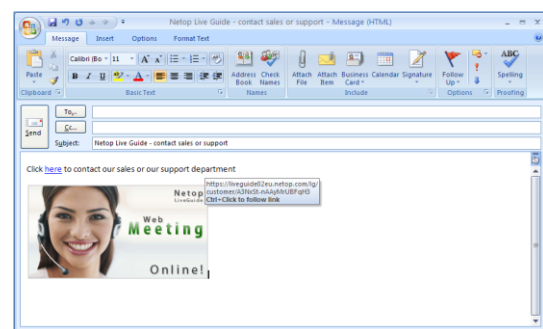
To use the link in an e-mail program, select the link, copy it and paste it into an e-mail as a hyperlink on either text or image.

Below is an example where Microsoft Office Outlook is used:



1. Copy the link from Live Guide.
2. In your e-mail, select the text you want the customer to click to open the call button (in the example the text "here" is selected) and click **Hyperlink** (in the example the command is marked with a red square).
3. In the **Insert Hyperlink** dialog box, paste the link from Live Guide into the **Address** field.

The example e-mail above has both a text and an image; you can choose to add a hyperlink to one or to both items. When you place the mouse pointer on one of your hyperlinks, the Live Guide https-link displays and you can verify that it has been added.

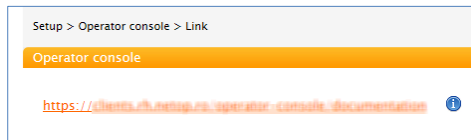


When the customer receives the e-mail and clicks one of the hyperlinks, the customer's browser will open and display the call button.

4 Enabling operators to log on to take calls

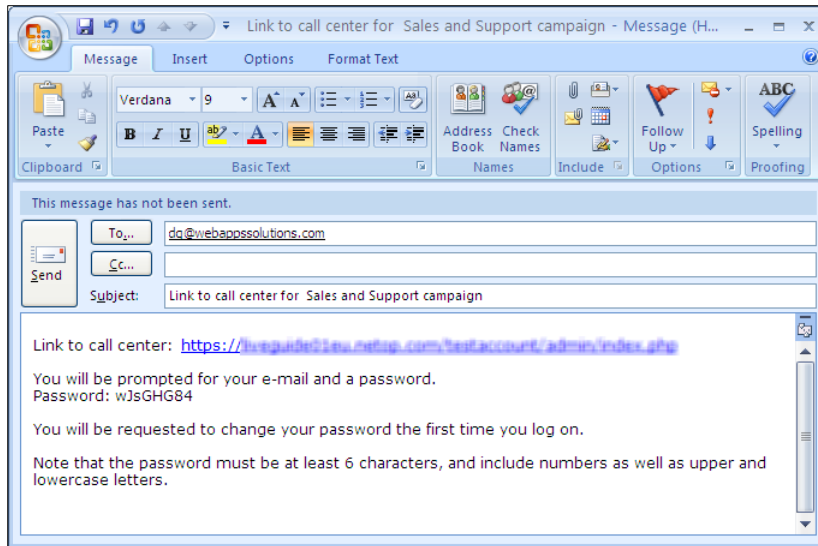
You must also make sure that the operators, in this example the users from the Sales and Support departments, have access to the call center functionality so that they are ready when the button is live.

On the **Setup** menu click **Operator console** to see the link.



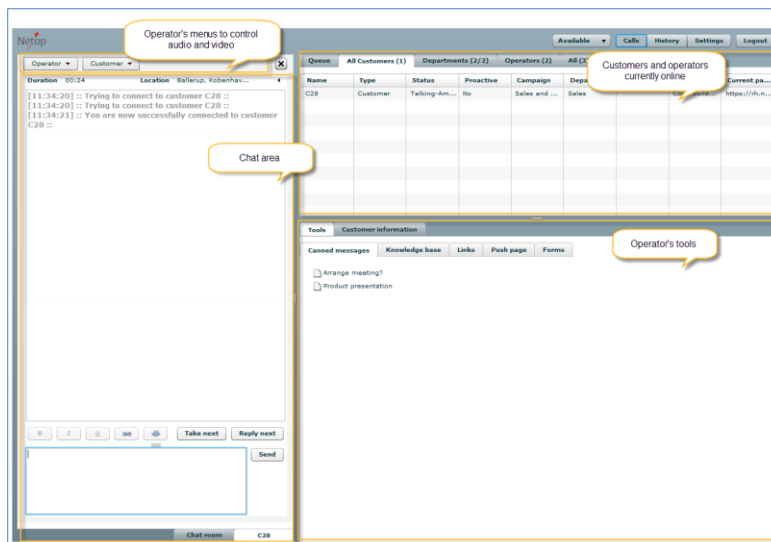
Copy the link and make sure that each of the operators who are part of the campaign receives the link as well as their password information.

An e-mail to an operator could look like this:



5 Manage calls

When operators click the call center link and log on, they see a window like this:



Customer and operators currently online

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.

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 **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.

Chat area – with basic customer information

Operators answer a customer call using the **Take next** button (the customer who has waited the longest in the queue) or by clicking a customer name in the **Queue** list and the chat begins in the chat area. If the customer has called before, the last conversation is automatically shown at the top of the chat area.

Basic customer information is available by clicking the triangle at the top of the chat area.

Operator's tools

When communicating with the customer, the operator has the tools created for the department at disposal on the **Tools** tab. There is a separate tab for each tool: **Canned messages, Knowledge base, Links, Push page** and **Forms**.

If the operator thinks that another operator is better able to assist the customer, the operator can transfer the call by clicking the **Transfer customer** from the **Customer** menu. The command is also available from the shortcut menu.

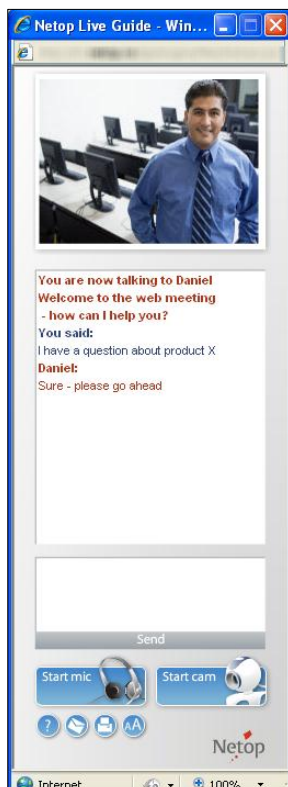
If the operator needs assistance, he or she can switch to the **Chat room** tab and ask the other operators for advice.

Operator can control use of sound and video

The operator can turn on his or her microphone and Webcam using the commands on the **Operator** menu.

The operator can also enable the customer to use audio and video; this is done from the **Customer** menu.

The illustration below is the above chat conversation as seen from the customer's perspective:



The customer sees a picture of the person he or she is chatting with.

The welcome text that displays before the chat session begins ("You are now talking to Daniel. Welcome to the web meeting – how can I help you?") is defined as part of the language presets.

The customer can start an audio and video session at any time using the **Start mic** and **Start cam** buttons.

The customer can also:

- Read more in Help.
- Have the chat transcript sent to an e-mail address specified by the customer.
- Print the chat transcript.
- Change the font size.

Note that a call button will only be active if one or more operators are actually available: on the **Code builder** tab, click the link and log on with appropriate user credentials.

The operator can end a call by clicking the **End call** button.

If mandatory categories have been defined, the relevant categories automatically display and the operator must

choose one.

For additional details about the operator interface, refer to the Netop Live Guide Operator's Guide.

6 Using statistics

When a campaign has been active for a period of time, statistical data are available for the campaign as a whole and for each operator. Statistics also include data on the effectiveness of proactive chat invites and on the hourly distribution of calls.

Statistics are updated once every 24 hours.

Each report type can be exported to PDF, CSV, CSV for Excel and XML and can be sent as an e-mail attachment in one of those formats, directly from Live Guide.

Each report has filter buttons narrow down the data range and time interval.

These types of statistics are available from the **Reporting** menu:

General	The General report presents overview data covering all calls, all campaigns and all departments for the past month.
Operators	<p>The Operators report presents overview data covering all operators for the past month.</p> <p>The report can be used to assess the load on operators and thus evaluate their efficiency in answering customer calls. The report also allows you to drill down and see call details.</p>
Activity	The Activity report presents data on the activity of an individual operator: when he or she logged in, changed status and logged out.
Invites	The Invites report presents data on how well proactive chat invites have worked, covering all campaigns and all departments for the past month.
Hourly	<p>The Hourly report presents overview data to evaluate whether staffing is adequate to handle calls at all hours and to evaluate whether the hours when operators are online match customer demand; the data covers all calls, all campaigns and all departments for the past month.</p> <p>The calls data will indicate when the peak hours are, whether the operators online can manage to answer all customer calls, how long customers are waiting, whether a lot of customers would have liked assistance when no operators were online and whether there are intervals when calls take longer to answer.</p> <p>To supplement the information in the overview table, some of the data is also presented in graphs.</p>

7 Using customer data

When a campaign is running all actions are logged and the full, live log can be accessed from the **Customer data** on the **Reporting** menu.

Like the reports under **Statistics**, **Customer data** can also be exported to PDF, CSV, CSV for Excel and XML and can be sent as an e-mail attachment in one of those formats, directly from Live Guide.

Both reports have filter buttons narrow down the data range and time interval.

These customer data reports are available from the **Reporting** menu:

Calls Use the **Calls** report to get an overview of all logged customer data.

Live Guide logs **ALL** data, even when the customer has not actually been connected to an operator: the customer may have filled in an offline form and geo data might also be relevant, for example to see data on customers who try to contact an operator outside opening hour.

Forms When forms have been used for data collection, whether they have been pushed to customers automatically or whether the operator has manually pushed the form, the data collected can be viewed in the **Forms** report.

Click **View form** in the **Options** column to the far right to view the actual form with data, or click **View log** to see the form data only.

8 Glossary

Below is a list of central Live Guide terms with a brief explanation of their meaning.

Administration	Administration is the collection of tools that system administrators use to create the call button component and to review the data collected when a call button has been active for a period of time, basically the tools described in the present guide.
Ban	A ban is a list of customers that have been prohibited from contacting operators. Customers can be banned based on their name (less restrictive) or on their IP address (more restrictive)
Call button	A call button is a component implemented on a Web page that a customer browsing the page can click to contact a company representative.
Campaign	A campaign defines the properties of a call button, including status, departments, language preset, start and end dates and images.
Canned message	<p>A canned message is a predefined text that the operator can select from a list. The contents of a predefined text could for example be salutations (“Hello, how may I help you today?”) or other brief messages (“I’ll have to look up the exact information. Please hold on for second.”).</p> <p>Canned messages are often general texts that are can be used across departments.</p>
Category	A category is used to indicate the topic of a customer call, for example “Meeting set up”, “Feature request” or “Pre-sales demo”. Statistics can be generated based on categories.
Code builder	Code builder is the mechanism that automatically generates the code to implement a call button; the code is generated based on the setup that the system administrator makes when defining departments, operators and campaigns.
Customer console	Customer console is the interface that customers see when they click a call button on a Web page to contact a company representative.
Department	A department is the equivalent of a call group. A department could correspond to a department in HR terms or could be used to indicate areas of expertise, for example “Sales” and “Support”.
Knowledge base	<p>A knowledge base text is a procedure-related, predefined text that the operator can select from a list. The contents of a knowledge base text will vary depending on business and on department. For a travel agency, a knowledge base text might provide information about baggage allowance; for a bank, a knowledge base text might explain the procedure for cashing checks. In a software company, a knowledge base text might explain how customers should make a feature request.</p> <p>Knowledge base texts would typically be department-specific.</p>

Language presets	A language preset is the collection of all texts used in the customer console. Default language presets can be used as a basis that you can modify and save as your own preset.
Link	A link is a predefined Internet link that the operator can select from a list.
Operator console	The Live Guide operator console is the operator interface that provides call center functionality. The operator console is what operators who respond to customer calls see and use.
Proactive chat	A proactive chat is a chat session with a customer which is initiated by Live Guide because the customer has been on a specific Web page for a configurable period of time.
Push page	A push page is a link type that controls the customer's browser window in that it opens a specific Web site.
Tools	Tools are a collection of different aids that system administrators can create and make available for operators. The tools include: canned messages, knowledge base, links, push page, forms, and category.
