LIVEPERSON v.5.0

USER MANUAL

LivePerson

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INTRODUCTION

What Is LivePerson?

Note: This Help is written for the Windows version of the LivePerson application. The Macintosh/Java version of the LivePerson application will include some differences.

LivePerson is a tool that enables you to see who is visiting your Web site, respond to requests for assistance from Web site visitors and proactively offer them help. This functionality gives you the ability to offer an unparalleled real-time sales and customer service experience.

LivePerson enables you to add functionality to your Web site so that you can:

- Chat with visitors
- Monitor the activity of visitors
- Initiate contact with visitors

After simply installing the LivePerson client on a workstation and adding LivePerson tags to your Web site, you are ready to chat to visitors.

LivePerson is available in Pro and Corporate versions. Corporate users have access to all LivePerson functionality. Pro users can view all LivePerson functionality but may not be able to access all the functionality. Refer to LivePerson Corporate vs LivePerson Pro for a summary of Corporate versus Pro features.

LivePerson for Sales and Support

As a support tool, LivePerson adds a call center element to your Web site so that support requests can be received by chat, as well as by phone and email. This is quicker and easier, and eliminates the need for multiple phone calls or emails. LivePerson improves the level of support and reduces costs.

As a sales tool, LivePerson increases sales by converting a browser to a buyer. It is easy for online shoppers to move on, especially if they have unanswered questions about a product. With LivePerson, visitors to your Web site can find answers to their questions with a simple click of the mouse. Answers to simple questions, such as "Have you got it in another color?", might convert a browser to a buyer. Additionally, you can use the proactive abilities of LivePerson to reach out and offer help.

Features and Benefits

With LivePerson, you can:

- Reach Out to Your Customers

Proactively greet and invite your Web site visitors to chat with you.

- Strengthen Customer Relationships

By addressing customers’ needs with real-time human interaction, you can make the difference between a one-time browser and a repeat customer.

- Maximize Sales Opportunities

Increase sales opportunities and enhance customer satisfaction by answering complex questions and resolving issues, right at the point of sale.

- Reduce Operating Costs

Dramatically reduce the cost per customer interaction over traditional inbound phone calls.

For further information, check out the FAQs at the LivePerson Help Center http://www.liveperson.com/help/index.asp.

See also:

How Does LivePerson Work?

The LivePerson Web site www.liveperson.com

LivePerson Corporate vs LivePerson Pro

The following table summarizes the differences between LivePerson Corporate and LivePerson Pro.

	Pro	Corporate
Chat and Site Monitoring Capability	V	V
Chat in Email Signature Capability	V	V
Customizable Chat Buttons and Message Windows	V	V
Chat Transcript and Caller History Data Storage	V	V
Push Pages, HTML and Preformatted Response Capability	V	V
Support Multiple Languages for User Interface Messages	V	V
LiveEngage	V	V
Dashboard	V	V
Format Toolbar	V	V
Administration Area to Set Up Additional Operators, Access Privileges, Survey Development		V
Operator Survey Capability to Categorize Chats		V
Customer Survey Capabilities - Pre-chat, Exit and Offline Surveys		V
Spell Checker		V
Operator Chat Transfer		V
Skill Groups		V
Custom Variables to Obtain Visitor Background Information		V
Automatic Call Distribution (ACD)		V
On-Hold Messages		V
Online Performance Reporting Capability		V
SSL Security		V
Private Messaging		V
LiveAlerts		V

How Does LivePerson Work?

LivePerson is quick and easy to set up. It can be set up and run by a single administrator/operator or accommodate an administrator and multiple operators.

Note: Most of the features are available only for LivePerson Corporate users.

The first stage is to add a LivePerson tag to as many pages of your Web site as required. A LivePerson Button tag appears as a button on your Web site that visitors can click to chat. A LivePerson Monitor tag is invisible to visitors but enables you to see when and who is visiting a particular page.

The LivePerson tag redirects visitors to your Web site to the LivePerson server. The LivePerson server determines if your operators are on line and displays the LivePerson button accordingly. For example, "Click to chat" when operators are online and available, "Can't talk now - offline" when operators are offline and unavailable.

Note: When operators are offline and not able to chat, visitors can still leave a message by email.

The second stage is to monitor your Web site using the LivePerson Chat Interface. When a visitor is on a page that includes a LivePerson Monitor tag, you can monitor their activity and view information about the individual visitor, such as a history of any previous visits. You can invite a visitor to chat with you at any time.

When a visitor is on a page that includes a LivePerson Button tag, they can click the button to request a chat with an operator. When the request is accepted, the operator can chat with the visitor using any of the useful LivePerson tools. For example, the operator can:

- Send predefined questions or answers to the visitor, which provides consistency and increases speed.
- Transfer the chat session to another operator, for example, if another operator has greater knowledge about the questions being asked by the visitor.
- Send the URL of any Web page to the visitor.
- Send simple short HTML code to the visitor.
- Move between chat sessions with different visitors. One operator can typically handle four concurrent chat sessions. The administrator sets the maximum number of concurrent chats for an operator according to the operator's knowledge and experience.

Note: Not all of these options may be available to an operator. The functionality available to an operator depends on the permissions assigned to the operator by the administrator.

Administrative functionality that is usually performed by an administrator (although can be performed by an operator with the relevant permissions) includes the following:

- Configuring operators, permission groups and skills.

- Using LiveAlerts to send alerts (notifications) to operators as a result of visitor behavior.
- Configuring system settings.
- Configuring LivePerson surveys for visitors and operators.
- Generating LivePerson reports, for example, how many operators are currently logged in, or how many chats were abandoned.

Most administrative functions are performed from the Admin Console.

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GETTING STARTED

Downloading and Installing LivePerson

The LivePerson application is downloaded from the LivePerson Web site, www.liveperson.com.

Once you have downloaded the 2 MB file, you should install the application on all operator stations and the administrator station in your network. During the installation, you are asked for your LP number, user name and password. These are provided by LivePerson.

Once you have installed the application, you can access LivePerson and embed the LivePerson tags on your Web site so that you can interact with visitors.

See also:

Accessing LivePerson

Embedding Tags

Accessing LivePerson

LivePerson includes a Chat Interface and an Admin Console, as follows:

Chat Interface: The Chat Interface is the interface used by operators for interacting with Web site visitors. From the Chat Interface, operators can:

- Chat with visitors.
- Respond to chat requests from visitors.
- Initiate chat requests with visitors.
- Observe the activity of visitors on your Web site.
- View details about visitors.

Operators may be able to access additional functionality from the Chat Interface, such as searching and viewing transcripts of previous chat sessions, according to the permissions granted to them by the administrator.

Admin Console: The Admin Console is the interface used by administrators to set up and configure LivePerson. From the Admin Console, administrators can:

- Add new operators, assign permissions and define skills.
- Configure system settings, such as enabling SSL for the account.
- Define and enable LivePerson surveys for visitors and operators.
- Configure alerts for operators triggered by visitor actions.
- Search and view transcripts of previous chat sessions.

To access the Chat Interface:

1. Access the Chat Interface in one of the following ways:
   - From the Windows *Start* menu, select **Programs**, and then select **LivePerson**.
   - Click the **LivePerson** icon on your desktop.
   - Double-click the **LivePerson** icon in the Windows status bar.
2. Enter your LP number, user name and password in the Login window and click **Login**.

A sample Chat Interface is shown below with two visitors to your Web site.

To access the Admin Console:

Access the Admin console in one of the following ways:

- From the Chat Interface *LivePerson* menu, select **Admin Console**.
- From the Chat Interface toolbar, click the **Admin** button.
- In your browser, enter http://server.iad.liveperson.net/hc/web/public/pub/ma/lp/login.jsp.

The LivePerson Admin Console is displayed, as follows:

See also:

Chat Interface Menu Bar

Chat Interface Toolbar

Admin Console Menu Bar

Admin Console Toolbar

Embedding Tags

Operators, you may not have permission to perform this task.

In order to be able to work with LivePerson, you must embed a LivePerson tag on your Web site. There are two types of tags that you can embed, as follows:

- **LivePerson Button**: This appears as a button on your Web site, inviting visitors to click and chat. You can embed a button from the LivePerson gallery or customize your own button to match the look and feel of your Web site. The button reflects the status of the operator, for example, indicating that the operator is ready to chat, offline or away for five minutes.
- **LivePerson Monitor**: This is invisible to visitors, but enables you to monitor the activity of visitors at your Web site and invite visitors to chat if required.

You can embed tags on as many pages in your Web site as required, and you can embed different buttons on different pages of your Web site.

Tags are embedded using an easy-to-use wizard that enables you to embed tags either manually or automatically. It is recommended that you use the manual procedure so that you can select the exact place on your Web site where you want the button to appear. LivePerson Monitor tags must always be placed immediately before the </body> tag.

You can also add a LivePerson Button to your email signature. Refer to Adding Tags to Email Signatures.

Advanced methods are available that allow you to customize the tags embedded in your Web site. Refer to Advanced Tags.

Note: The following procedure describes how to embed tags from the Chat Interface. You can also embed tags from the Admin Console.

To embed tags manually:

1. From the *Tools* menu, select **Add LivePerson Button**. The *Button Embed* window is displayed.
2. Select the **Manually embed the LivePerson Button** option and click **Next**. The *Button Type* window is displayed.
3. Select the **LivePerson Button Gallery** option to use a predefined LivePerson button.

Note: To design your own button, click the **Customized Buttons** option. Clicking **Information** provides a description of the procedure.

4. Click **Next**. The *Button Gallery* window is displayed.
5. Specify the button to include on your Web site by selecting from the following fields:
    - **Language**: Select the language for the text on the button.

- **Main Category**: Select the category of the button. There are currently three categories of buttons: **holiday** (for festive buttons), **liveperson** (for text-only buttons) or **woman** (for buttons with a female face).
- **Sub Category**: Select the button within the selected category. Buttons are numbered in each category.

A preview of the selected button is displayed on the right side of the window.

Note: Click **View Images and Buttons** to access and browse the complete button gallery. Each button has several variations to cover situations when an operator is offline, away from the workstation, and so on.

6. Click **Next**. The *Add Tags* window is displayed. The HTML code for the selected button is displayed in the **LivePerson Button** area and the HTML code for a monitor tag is displayed in the **LivePerson Monitor** area.
7. Copy and paste the HTML code into the pages of your Web site, as required. Note the following:
   - The HTML code for the LivePerson Button tag can be pasted anywhere in a Web page and on as many pages as required. The button is displayed on the Web page at exactly the point where the code is placed.
   - The HTML code for the LivePerson Monitor tag must be pasted immediately before the </body> tag. The LivePerson Monitor tag can be placed on as many Web pages as required.
   - In order to track a visitor on a specific page in your Web site and invite them to chat, the page must include a LivePerson Monitor tag.
8. Click **Finish** to close the wizard.

You can also use the wizard to embed LivePerson Button and LivePerson Monitor tags automatically into every page of your Web site, as well as remove the tags from your Web site.

Note: You can also remove tags by simply deleting the HTML code for the tags from your Web pages.

Note: Not all of these options may be available to an operator. The functionality available to an operator depends on the permissions assigned to the operator by the administrator.

See also:

[Adding Tags to Email Signatures]

[Advanced Tags]

Chatting With Visitors

Whether you have initiated a chat or responded to a chat request, once the chat session begins, you can chat with a visitor utilizing user-friendly and easy-to-use tools.

The Chat tab of the Chat Interface is where you chat with visitors.

Simply enter text in the lower text entry area and click **Send**. Spelling mistakes are highlighted in red automatically as you type. The sent text is displayed in the upper chat display area next to your nickname. Replies and text sent by the visitor are also displayed in the upper chat display area next to the visitor's name or IP address. You can use canned responses, which are predefined phrases designed to save you time and ensure consistency when engaged in chat sessions.

The visitor chats using the chat window, as shown below:

You can customize the appearance of the chat window. Refer to Customizing the Chat Window.

During a chat session, the **State** of the visitor in the Visitor's List is **Chatting**.

You can terminate the chat session at any time by selecting **Stop Chat** from the *Visitor* menu or clicking the **Stop** button. The chat session is stopped and the visitor receives a message in their chat window indicating that the chat session has been terminated by the operator. The **State** of the visitor in the Visitor's List changes to **Chat Ended**.

The visitor can also terminate the chat session by closing their chat window. You will see that the **State** of the visitor in the Visitor's List changes to **Chat Ended**.

The following tools are available to you during the chat session:

- **Transferring Chats**: You can transfer the chat session to another operator or to the administrator, for example, if another operator has greater knowledge about the questions being asked by the visitor. You can select which operator to transfer the chat to and send a short message (visible only to the operator) to communicate the chat details. If the operator refuses the chat, the chat is returned to you. Select **Transfer Chat** from the *Visitor* menu or click the **Transfer** button.
- **Sending URLs**: You can send the URL of any Web page to the visitor. The visitor receives a popup browser window (outside of the chat window) with the specified page displayed. Select **Push Page** from the *Visitor* menu or click the **Push** button.
- **Sending HTML**: You can send simple short HTML code to the visitor. This is useful to send pictures, links or other graphics inside the chat window. For more complicated HTML strings, use the Canned Responses option. Select **Send HTML** from the *Visitor* menu or click the **HTML** button.

Note: Not all of these options may be available to an operator. The functionality available to an operator depends on the permissions assigned to the operator by the administrator.

See also:

[Initiating Chats]

[Responding to Chat Requests]

[Monitoring Visitors]

[Tracking Visitors]

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LP ENVIRONMENT

Chat Interface Menu Bar

Note: Not all of these options may be available to an operator. The functionality available to an operator depends on the permissions assigned to the operator by the administrator.

The Chat Interface includes the following menus:

File Menu

Settings	Enables you to specify general system settings, for example, your Internet connection and the sounds to play when particular events occur, such as the arrival of a chat request.
Profile	Enables you to use more than one LivePerson account simultaneously on the same computer. For example, you may have one LivePerson account for pre-sales customer support and a second for post-sales product support. Using profiles enables you to handle chats for both accounts on the same computer.
Exit	Closes LivePerson.

Visitor Menu

Want to Chat	Enables you to initiate a chat session with a selected visitor in your Web site. Refer to Initiating Chats.
Transfer Chat	Enables you to transfer a chat session to another operator or the administrator. Refer to Chatting With Visitors.
Send Private Message	Enables you to send a private message in a selected chat session that is only visible to the operator.
Stop Chat	Terminates the selected chat session. Refer to Chatting With Visitors.
Push Page	Enables you to send a URL of a page to a visitor during a chat session. Refer to Chatting With Visitors.
Send HTML	Enables you to send short HTML code to a visitor during a chat session. Refer to Chatting With Visitors.
Accept Next Chat	Accepts the next chat request waiting in the chat queue. Refer to Chatting With Visitors.
Next in Line	Switches to the next visitor (in a chat session) waiting for a reply from you. Refer to Chatting With Visitors.

Accept Chat	Accepts the chat request from the visitor selected in the Visitor's List, or if no visitor is selected, accepts the next chat request waiting in the chat queue. Refer to Chatting With Visitors.
Refuse Chat	Refuses the chat request from the visitor selected in the Visitor's List, or if no visitor is selected, refuses the next chat request waiting in the chat queue. Refer to Chatting to Visitors.
Chats History	Displays the history of a selected visitor, including details of previous visits to your Web site and whether or not they engaged in a chat session. Refer to Tracking Visitors.
All Sessions History	Displays the history of all chat sessions, including the chat transcript, dates of previous visits and the navigation through your site.
Open Alerts Window	Displays the Alerts window in the lower right area of the Chat Interface. Refer to Configuring Alert Rules and Outcomes.

View Menu

Toolbars	Enables you to hide/display the Main toolbar, the Chat Traffic toolbar and the Format toolbar. Refer to Chat Interface Toolbars.
Status Bar	Displays/hides the status bar in the Chat Interface.
Always On Top	Displays the Chat Interface as the top window when multiple windows are open.
All Visitors	Displays all visitors to your Web site in the Visitor's List.
All Chats	Displays only visitors currently engaged in a chat session in the Visitor's List.
Skill Chats	Displays only visitors currently engaged in a chat associated with your skill group in the Visitor's List.
My Chats	Displays only visitors currently engaged in a chat session with you in the Visitor's List.

Tools Menu

Add LivePerson Button	Enables you to add LivePerson Button tags and LivePerson Monitor tags to your Web site. Refer to Embedding Tags.
Add Email Signature	Enables you to add a LivePerson Button tag to your email signature. Refer to Adding Tags to Email Signatures.
Information	Enables you to configure basic site and operator information, for example, your nickname and your email address.

Chat Window	Enables you to customize the way the visitor's chat window is displayed. Refer to Customizing the Chat Window.

LivePerson Menu

Dashboard	Displays your dashboard. Refer to LivePerson Dashboard.
Home Page	Displays the LivePerson home page (www.liveperson.com) in a browser window.
Admin Console	Provides access to the Admin Console. Refer to Admin Console Menu Bar and Admin Console Toolbar.
Chat Transcripts	Displays the Chat Transcripts page in the Admin Console, which enables you to search through the database of chat transcripts. Refer to Searching Chat Transcripts.
Sign Up	Displays the Account Details page in the Admin Console, which enables you to update information about your LivePerson account.
Update LivePerson	Enables you to update your version of LivePerson.

Canned Menu

Modify	Enables you to add new predefined responses and edit or delete existing canned responses. Refer to Canned Responses.
Add Last	Adds the text entered by the operator to send, or the last text sent in a chat session, to the database of canned responses.
Pop Up	Enables you to select a canned response to send. Refer to Canned Responses.
HTMLs	Provides quick access to HTML canned responses.

The remaining entries in the *Canned* menu provide quick access to text canned responses.

Help Menu

Tip of the Day	Displays tips and tricks useful when working with LivePerson.
Help Topics	Provides access to online help.
Frequently Asked Questions	Provides access to common questions about LivePerson and useful relevant answers to those questions.
LivePerson's Support	Provides access to technical support.

About LivePerson	Displays version information.

Chat Interface Toolbars

Note: Not all of these options may be available to an operator. The functionality available to an operator depends on the permissions assigned to the operator by the administrator.

The Chat Interface includes the following toolbars:

Main Toolbar

	Enables you to initiate a chat with a selected visitor in your Web site. Refer to Initiating Chats.
	Enables you to transfer a chat session to another operator or the administrator. Refer to Chatting With Visitors.
	Terminates the selected chat session. Refer to Chatting With Visitors.
	Displays the history of a selected visitor, including details of previous visits to your Web site and whether or not they engaged in a chat session. Refer to Tracking Visitors.
	Enables you to send a URL of a page to a visitor during a chat session. Refer to Chatting With Visitors.
	Enables you to send short HTML code to a visitor during a chat session. Refer to Chatting to Visitors.
	Displays the LivePerson home page (www.liveperson.com) in a browser window.
	Provides access to common questions about LivePerson and useful relevant answers to those questions.
	Provides access to the Admin Console. Refer to Admin Console Menu Bar and Admin Console Toolbar.
	Displays the Chat Transcripts page in the Admin Console, which enables you to search through the database of chat transcripts. Refer to Searching Chat Transcripts.
	Enables you to filter the Visitor's List, for example, to display only visitors currently chatting or only chats associated with your skill group. Refer to Monitoring Visitors.

Chat Traffic Toolbar

	Accepts the next chat request waiting in the chat queue. The number in parentheses indicates the number of chats in the queue. Refer to Responding to Chat Requests.
	Switches to the next visitor (in a chat session) waiting for a reply from you. Refer to Chatting With Visitors.
	Accepts the chat request from the visitor selected in the Visitor's List, or if no visitor is selected, accepts the next chat request waiting in the chat queue. Refer to Responding to Chat Requests.

	Refuses the chat request from the visitor selected in the Visitor's List, or if no visitor is selected, refuses the next chat request waiting in the chat queue. Refer to Responding to Chat Requests.

Format Toolbar

The Format toolbar provides tools that enable you to change the appearance of the text entered in your chat messages and send predefined responses.

	Enables you to select the type of font used in your chat messages.
	Enables you to select the size of font used in your chat messages.
	Bolds text.
	Italicizes text.
	Underlines text.
	Enables you to change the color of text.
	Enables you to send a predefined response when chatting. Refer to Canned Responses.

Admin Console Menu Bar

The Admin Console includes the following menus:

Home Menu

Selecting the *Home* menu displays the Admin Console Welcome page in the display area.

Administration Menu

Settings	Enables you to configure system settings, such as enabling SSL for the account. Refer to Configuring System Settings.
Operators	Enables you to add new operators, as well as modify or delete existing operators.
Skills	Enables you to add new skills, as well as modify or delete existing skills. Refer to Managing Operators.
Permissions	Enables you to add new permissions, as well as modify or delete existing permissions.

Customization Menu

Tag Embedding	Enables you to embed LivePerson Button and LivePerson Monitor tags in your Web Site. Refer to Embedding Tags.
Chat Window	Enables you to customize the way that the visitor's chat window is displayed. Refer to Customizing the Chat Window.
Responses	Enables you to add new canned responses, as well as edit or delete existing canned responses. Refer to Canned Responses.

Surveys Menu

Pre-Chat	Enables you to define and enable Pre-chat surveys for visitors. Refer to LivePerson Surveys.
Exit	Enables you to define and enable Exit surveys for visitors. Refer to LivePerson Surveys.
Offline	Enables you to define and enable Offline surveys for visitors. Refer to LivePerson Surveys.
Operator	Enables you to define and enable Operator surveys for operators. Refer to LivePerson Surveys.

LiveAlerts Menu

Rules	Enables you to define the events that trigger an alert. Refer to Configuring Alert Rules and Outcomes.
Outcomes	Enables you to define the alerts that are sent when rules are satisfied. Refer to Configuring Alert Rules and Outcomes.

Chat Transcripts Menu

Search	Enables you to search through the database of chat transcripts. Refer to Searching Chat Transcripts.
7-Day	Displays a summary of the chat transcripts per operator for the last seven-day period.
Month	Enables you to display a summary of the chat transcripts for a selected month.

Reports Menu

Operations	Enables you to create and view Operations reports. Refer to LivePerson Reports.
Business	Enables you to create and view Business reports. Refer to LivePerson Reports. Contact Professional Services at ps@liveperson.com to receive this feature.
Scoreboard	Displays the scoreboard, which displays statistics about the current chat situation. Contact Professional Services at ps@liveperson.com to receive this feature.

Account Menu

Selecting the *Account* menu displays the Account Details page in the display area, which enables you to update information about your LivePerson account.

Note: Most of the features are available only for LivePerson Corporate users.

Admin Console Toolbar

The Admin Console toolbar indicates your LP account number, with your user name in parentheses. Additionally, it provides the following two buttons:

Help: Provides access to online help.

Log Out: Logs out from the Admin Console.

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OPERATOR PROCEDURES

Responding to Chat Requests

When a visitor to your Web site clicks the LivePerson Button requesting a chat session, the following indications occur in the Chat Interface:

- A telephone ring sounds and continues to sound at regular intervals until the chat request is accepted or refused.
- The **Waiting for Chat** field in the Visitor Bar indicates that a visitor is waiting to chat.
- The **State** of the visitor in the Visitor's List is **In Queue** with the icon flashing to the left of the **State** field.

Accepting Chat Requests

You can accept the chat request by clicking or in the Chat Traffic toolbar. This accepts the next chat request waiting in the chat queue. The number in parentheses on the **Chat** button indicates the number of chats in the queue.

Note: To accept a chat request from a specific visitor, select the visitor in the Visitor's List and then click in the Chat Traffic toolbar.

Once you have accepted the chat request, the **State** of the visitor changes to **Chatting** and the **Chat** tab is displayed in the lower pane of the Chat Interface. You can now chat in the usual way.

Refusing Chat Requests

You can refuse the chat request by clicking in the Chat Traffic toolbar. This refuses the next chat request waiting in the chat queue.

Note: To refuse a chat request from a specific visitor, select the visitor in the Visitor's List and then click in the Chat Traffic toolbar.

See also:

Chatting With Visitors

Initiating Chats

Monitoring Visitors

Initiating Chats

Operators, you may not have permission to perform this task.

When you see that a visitor is on your Web site, you can invite them for a chat at any time. The visitor receives a popup inviting them to chat.

To invite a visitor to chat:

1. Select a visitor in the Visitor's List.
2. From the *Visitor* menu, select **Want to Chat** or click the **Chat?** button. The selected visitor receives a popup invitation to chat. A sample is shown below.

The visitor can click the button to accept the chat request or click **Close** to refuse the request.

When the visitor accepts the chat request, a telephone ring sounds and the **State** of the visitor changes to **Engaged for Chat**. You can now chat in the usual way with the visitor.

Note: Not all of these options may be available to an operator. The functionality available to an operator depends on the permissions assigned to the operator by the administrator.

See also:

LiveEngage

Chatting With Visitors

Responding to Chat Requests

Monitoring Visitors

Canned Responses

Canned responses are predefined phrases designed to save the operator time and ensure consistency when engaged in chat sessions. You can define your own common responses and add them to the database of canned responses. You can also select any canned response from the database and send it during a chat session.

There are two types of canned response, as follows:

Text: Simple unformatted text phrases.

HTML: HTML code. This enables you to send pictures and illustrations or formatted canned responses, such as a bulleted lists.

Note: The following procedure describes how to configure canned responses from the Chat Interface. You can also configure canned responses from the Admin Console.

Sending Canned Responses

Sending a canned response may be useful at the beginning of a chat session, for example, to welcome the visitor, as well as during a chat session. The canned response may ask a question to ensure that important information is received.

To send a canned response:

1. At any time during a chat session, select **Pop Up** from the *Canned* menu or click in the Format toolbar. The *Canned Responses* window is displayed.
2. Select the required canned response. Text canned responses are organized by categories and displayed by title. HTML canned responses are categorized under HTML and follow after the text canned responses. Selecting a title displays the full text of the canned response in the lower text box, as shown above.
3. If required, edit the selected canned response in the lower text box. Any modifications are not saved to the canned response database.
4. Click **Send** to send the canned response to the visitor or click **Add** to add the canned response to the text entry area of the Chat Interface. You can then add to it or edit it before sending it.

Tip: The *Canned* menu also provides shortcuts to canned responses. The **HTMLs** option includes all HTML canned responses as suboptions. Categories of text canned responses appear as options in the *Canned* menu and the actual canned responses in each category appear as suboptions. For example:

Configuring Canned Responses

Operators, you may not have permission to perform this task.

You can add canned responses of your own to the canned responses database or change existing responses using the **Modify** option. For ease of use, canned responses are represented by a title and categorized into relevant categories, such as **Introductions** or **Closing Statements**.

You can also add new canned responses on the fly by selecting **Add Last** from the *Canned* menu. This will add the current text entered in the text entry area of the Chat Interface to the canned responses database. If no text is entered, it will add the last text sent in a chat session or the last HTML code "pushed". If the text already exists as a canned response, no new canned response is created. Canned responses created in this way do not have titles and are not categorized at all.

To configure canned responses:

1. From the *Canned* menu, select **Modify**. The *Modify Canned Responses* window is displayed providing a list of currently defined canned responses.

Note: Text canned responses are displayed in the **Texts** tab and HTML canned responses are displayed in the **HTMLs** tab.

2. Modify the list of canned responses using the available buttons, as follows:
   - Click **Menu** to add a new category. If a category is selected but not expanded, a new category is added. If a category is selected and expanded, a new subcategory is added below the selected category.
   - Click **Message** to add a new canned response. You must specify both the full text of the canned response and a short title for the canned response. The response is added to the selected category. When adding an HTML canned response, you may prefer to write the response in a word-processing application and then cut and paste it.
   - Click **Edit** to modify the text or title of a selected canned response.
   - Click **Delete** to remove a selected canned response.
   - Click **Separator** to add a separator between categories or subcategories, as required. The separator is placed after the selected item. To place a separator between categories, collapse the categories first. A separator can help you navigate between categories and canned responses.
3. Click **OK** to close the *Modify Canned Responses* window and update the database with your changes.

Note: Not all of these options may be available to an operator. The functionality available to an operator depends on the permissions assigned to the operator by the administrator.

Monitoring Visitors

When a LivePerson Monitor tag is embedded in a Web page on your Web site, a doorbell sound ("ding-dong") and the flashing LivePerson icon in your Windows system tray indicate that a visitor has entered the page.

You can see information about the visitor in the Chat Interface, as well as monitor their activity while visiting your site.

The upper pane of the Chat Interface includes a Visitor Bar and a Visitor's List.

Visitor Bar

The Visitor Bar is located above the Visitor's List, as follows:

It includes the following information:

Status Dropdown List: Indicates the status and availability of the operator. You can select from the following statuses:

- **Offline**: When you are offline. Site visitors will see a button indicating that you are offline and that you cannot chat, but that they have the option to leave an email message.
- **Online**: As long as you are connected to the Internet, the default status is online. The doorbell sound ("ding-dong") and flashing LivePerson icon indicate that a visitor is on your site and you can initiate chats and accept chat requests. Site visitors will see a button indicating that you are online and available to chat.
- **Back in 5 Minutes**: If you are online but do not want to be disturbed for a few minutes. Site visitors will see a button indicating that you will be back in five minutes and they can either leave an email message or try to chat later.
- **Away**: This status indicates to the LivePerson server that you are unavailable. It is enabled automatically if your screensaver goes on. Site visitors will see a button indicating that you are offline and that you cannot chat, but that they have the option to leave an email message. If you are online but do not want to be disturbed (for longer than a few minutes), we recommend switching to **Away** status.

Note: You can also change your status by right-clicking the LivePerson icon in the Windows system tray and selecting **Status** followed by the required status.

Visitors: Indicates the number of visitors on your Web site (on pages with the LivePerson Monitor tag).

Waiting for Chat: Indicates the number of visitors that are waiting to chat.

Waiting for Response: Indicates the number of visitors in chat sessions that are waiting for a response from an operator.

Waiting for You: Indicates that a chat has been transferred to you and is waiting for you to accept or refuse. (This field is displayed when ACD is enabled or another operator has transferred a chat to you.)

Visitor's List

The Visitor's List provides a list of visitors currently visiting your Web site. For each visitor, you see the following information:

Chatter ID	The IP address of the visitor or the name they enter in the Pre-chat survey. When the visitor has previously visited your Web site and engaged in chat sessions, the icon is displayed to the left of the **Chatter ID**.
Skill	The skills associated with the visitor.
State **Note**: If the Operator survey is enabled, the icon will appear to the left of the **State** field to remind the operator to complete the Operator survey after a chat session is concluded.	The current status of the visitor: **In Site**: The visitor is on a page that includes the LivePerson Monitor tag. **Engaged for Chat**: An operator has proactively requested a chat with the visitor. **No Chat**:The visitor has refused the proactive request to chat from the operator. **In Queue**: The visitor has requested a chat and is in the chat queue. **Chatting**: The visitor is engaged in a chat session with an operator. **Chat Refused**: An operator refused to accept the chat request from the visitor or a timeout occurred before an operator was able to accept the chat request. **Transferring**: An operator is attempting to transfer the visitor to another operator.
Operator	The nickname of the operator chatting (or attempting to chat) with the visitor.
Current Page	The page in your Web site that the visitor is currently viewing.
Total Time	The total amount of time that the visitor has spent on your Web site.
Chat Time	The amount of time that the visitor has been chatting (black ascending clock), or a countdown for ACD attempts (red descending clock).
# of Pages	The total number of pages (that include the LivePerson Monitor tag) visited in your site.
Browser	The browser used by the visitor.

Right-clicking a visitor in the Visitor's List displays the *Visitor* menu.

You can sort the Visitor's List by double-clicking a column title. For example, double-click **Operator** to sort the list by operators.

You can select a visitor in the upper pane to display further information in the lower pane of the Chat Interface. Refer to Tracking Visitors for a description of the information displayed in the tabs in the lower pane of the Chat Interface.

Filtering the Visitor's List

Operators, you may not have permission to perform this task.

You can filter the Visitor's List to display a selected groups of visitors using the options in the *View* menu or the **Filter** button as follows:

- **All Visitors**: Displays all visitors to your Web site in the Visitor's List.
- **All Chats**: Displays only visitors currently engaged in a chat session in the Visitor's List.
- **Skills Chats**: Displays only visitors currently engaged in a chat associated with your skill group in the Visitor's List.
- **My Chats**: Displays only visitors currently engaged in a chat session with you in the Visitor's List.

Note: Not all of these options may be available to an operator. The functionality available to an operator depends on the permissions assigned to the operator by the administrator.

See also:

Chatting With Visitors

Initiating Chats

Responding to Chat Requests

Tracking Visitors

The lower pane of the Chat Interface includes several tabs that provide information about visitors to your Web site. Selecting a visitor in the Visitor's List displays information specific to that visitor in the tabs in the lower pane. By default, the **Info** and **Navigation** tabs are displayed for each visitor. The following additional tabs may be displayed, as follows:

- The **Chat** tab is displayed when a chat session is in progress with a visitor. (The **Chat** tab provides the chat window for the operator.)
- The **History** tab is displayed when you request to view a visitor's history (by clicking the **History** button).
- The **Survey** tab is displayed when the administrator has enabled the operator survey. The operator completes the operator survey (in the **Survey** tab) after every chat session.

Info Tab

The **Info** tab contains information similar to the Visitor's List. In addition, it includes the following information about the selected visitor:

Last Visit: The date and time of the visitor's last visit to your Web site.

Last Chat: The date and time of the visitor's last chat session.

Host: The host (when the IP address of the visitor is identifiable by the server).

Referrer: The URL of the page from which the visitor came to your Web site.

Pre-chat Survey: The visitor's answers to the Pre-chat survey.

Navigation Tab

The **Navigation** tab shows which pages on your Web site are being visited by the selected visitor. It includes a list of Web pages visited by the visitor, including the following information for each page:

Page: The URL of the page visited by the visitor.

Title: The title of the page visited by the visitor.

Referrer: The URL of the page from which the visitor came to the page.

Date: The date and time the visitor visited the page.

History Tab

The **History** tab enables you to see a history of current and previous visits by a selected visitor. Each visit is recorded with a number, the date and time and an indication of whether the visitor engaged in a chat session.

Clicking a particular chat number displays the chat transcript, the visitor navigation and surveys details for the selected visit.

Note: Not all of these options may be available to an operator. The functionality available to an operator depends on the permissions assigned to the operator by the administrator.

See also:

Monitoring Visitors

Chatting With Visitors

Customizing the Chat Window

Operators, you may not have permission to perform this task.

The chat window is the window that visitors use to chat with operators. A sample chat window is shown below.

You can specify which language is used in the chat window, as well as modify the look and feel to match your Web site design.

Note: The following procedure describes how to customize the chat window from the Chat Interface. You can also customize the chat window from the Admin Console.

To customize the chat window:

1. From the *Tools*, select **Chat Window**. The *Chat Window* is displayed.
2. In the **Language** tab, select the language for the chat window. Prompt messages appearing in the chat window as well as the **Send** button will be displayed in the selected language.
3. In the **Look and Feel** tab, you can select the image that is displayed on the upper-right side of the chat window. You can select an image from the LivePerson button gallery or use your own image and window colors. When you use your own image, the image must be exactly 85 x 180 pixels and placed on the Internet (usually in the same location as your Web server).

Note: Click **View Images and Buttons** to access and browse the complete LivePerson button gallery.

4. Click **OK** to save your settings.

Note: Not all of these options may be available to an operator. The functionality available to an operator depends on the permissions assigned to the operator by the administrator.

When customizing the chat window from the Admin Console, you can also customize the following:

- **System Messages**: These are messages displayed to visitors when certain events occur, for example, the chat session is transferred to another operator.
- **On-hold Messages**: There are three on-hold messages that are displayed to visitors when the operator does not respond during a chat session for a specified amount of time.

LIVEPERSON v.5.0
USER MANUAL

ADMINISTRATOR PROCEDURES

Searching Chat Transcripts

Operators, you may not have permission to perform this task.

LivePerson stores information about all chat sessions in its database. You can search this database for a particular chat session and view the full transcript of that session or other pertinent information. The following information is stored for each chat:

- General chat information, such as the time and duration of the chat, the name of the operator, the host IP address, and so on.
- Actual chat transcript, including every word communicated during the chat session.
- Navigation information including URL, referrer and time.
- History, including information about previous site visits.
- Survey details.

You search for chat transcripts from the Search Chat Transcripts page in the Admin Console. This page can be accessed from both the Admin Console and the Chat Interface, as follows:

- In the Admin Console, select **Search** from the *Chat Transcripts* menu.
- In the Chat Interface, select **Chat Transcripts** from the *LivePerson* menu or click the **Chats** button.

From the Search Chat Transcripts page, you can search for chat transcripts that meet a given criteria, for example, all transcripts for a specified operator or all transcripts containing a particular keyword. You can specify as many of the following criteria as required. Remember that the more criteria you specify, the narrower the search.

- Time period (**Start Date**/**Time** and **End Date**/**Time** fields)
- Operator (**Operator** field)
- Question from a survey (**Survey Question** and **Value** fields)
- Custom variables (**Parameter** and **Value** fields)
- Keyword (**Keyword** field)

Note: When you specify more than one criteria, the relationship between the criteria is AND, meaning that all the specified criteria must be met.

The chat transcripts that match your specified criteria are displayed in a report. You can select the format of the report (either HTML or Excel) and the number of results shown per page in the Search Chat Transcripts page.

You can then select any chat in the report to see details about the chat, including general information such as chat duration as well as a full transcript of the chat session.

Use the buttons at the top of the report to modify the summary displayed. For example, click **Visitor** to include visitor information.

Chat Transcripts from the Past Week

Selecting **7-Day** from the *Chat Transcripts* menu displays a summary of all the chat sessions during the past week. The number of chats for each operator for each day is displayed, as well as the total number of chats for each operator over the past seven-day period.

Click a daily total for an operator to display a report summarizing the chats.

You can then select any chat in the report to see details about the chat, including general information such as chat duration as well as a full transcript of the chat session.

Chat Transcripts from a Selected Month

Selecting **Month** from the *Chat Transcripts* menu enables you to view a summary of all the chat sessions during a selected month. Enter the required month and year, and click **List Transcripts** to display the total number of chat sessions and the average chat duration for each day in the selected month, as well as for the entire month.

Click a day to display a report summarizing the chats for that day.

You can then select any chat in the report to see details about the chat, including general information such as chat duration as well as a full transcript of the chat session.

Note: Not all of these options may be available to an operator. The functionality available to an operator depends on the permissions assigned to the operator by the administrator.

Configuring Operators

Operators, you may not have permission to perform this task.

Note: Not all of these options may be available to an operator. The functionality available to an operator depends on the permissions assigned to the operator by the administrator.

Regardless of how many concurrent operator logins you have signed up for, you can add as many operators to the system as required. You can also modify the properties of existing operators and delete operators. When adding an operator, you specify general details including name, password and email address, as well as the number of chats the operator can engage in at the same time. Additionally, you must select the permission group to which the operator belongs and you can assign skills to the operator if required.

Before adding operators, you should ensure that you have defined the necessary skills and configured relevant permission groups.

Operators are configured from the Admin Console.

To add a new operator:

1. From the *Administration* menu, select **Operators**. The Operator List page is displayed, showing a list of the operators currently defined in LivePerson.

Note: The **Status** column indicates whether the operator is currently online (meaning their LivePerson software is in an online, chat-ready mode) or offline.

2. Click the link above the list to add a new operator. The Operator Properties page is displayed.
2.

3. Specify the properties for the operator, as follows:

Username	The user name for the operator. Operators use this name to install LivePerson on their computers and to access the Admin Console.
Nickname	The nickname for the operator. This is the name that visitors see when chatting with the operator.
Password	The password for the operator. Note that passwords are case sensitive.
Retype password	Confirmation of the password.
E-mail Address	The email address of the operator. This should be the operator's normal business email address.
Max no. of Chats	The maximum number of simultaneous chats the operator can handle.
Permission Group	The permission group to which the operator belongs. The operator has all the rights assigned to the permission group. The available permission groups are those defined in the system.
Skills	The skills of the operator. Chats may be directed to operators with a specific skill based on the nature of the chat required. The available skills are those defined in the system.

4. Click **Update** to save your settings. The new operator appears in the list of operators in the Operator List page.
5. To modify the properties of an operator, click the name of the operator in the list of operators on the Operator List page and modify the properties as required. To delete an operator, click **Delete** in the Operator Properties page.

See also:

Configuring Permission Groups

Defining Skills

Configuring System Settings

System settings are configured from the Admin Console and only administrator users can perform this task.

You can enable chat encoding, set a default email address for your offline email and enable ACD (Automatic Call Distribution) for your account.

To configure system settings:

1. From the *Administration* menu, select **Settings**. The Settings page is displayed.
2. Select the **128 bit SSL** checkbox to enable encoding of chats in SSL (Secure Socket Layer), which is the leading security protocol on the Internet. SSL encryption ensures the privacy of your chats by encoding them as they are transmitted over the Internet. When SSL is enabled, the icon is displayed in the status bar of the Chat Interface.
3. Select the **Show Operator Dashboard** checkbox to enable the LivePerson Dashboard. The Dashboard is displayed automatically on the first login and the operator can select whether or not to continue displaying the Dashboard automatically on login.
4. In the **Offline E-Mail** field, enter an offline email address. This is the email address that visitors will contact when they want to chat but the operator is offline.

Note: If an email is defined for a skill group, then offline emails are sent according to the skill requested.

5. In the **ACD** area, select **On** to enable ACD. LivePerson will now hold a chat request for an operator for a specified time and then, if the operator does not respond, move on to another operator. Specify the parameters for call distribution, as follows:
   - **Call Presentation Timeout**: Enter the number of seconds LivePerson waits for an operator to respond before moving on to another operator. The default setting is 20 seconds.
   - **Max Call Presentations**: Enter the maximum number of simultaneous presentations of ACD attempts to a single operator. The default setting is 3.

Note: The operator can observe ACD in action in the **Chat Time** field in the Visitor's List. The clock (displayed in red) provides a countdown for ACD attempts.

6. Click **Submit** to save the system settings.

Configuring Alert Rules and Outcomes

Only an administrator user can configure alert rules and outcomes.

LivePerson provides a system called LiveAlerts that enables you to react to visitor activity on your Web site, based on business rules.

You can configure LiveAlerts to send alerts (notifications) to operators as a result of visitor behavior. For example, when a visitor has been on the same page for more than a specified period, an alert is sent to an operator so that he or she can initiate a chat offering the visitor assistance. Alerts are sent to operators (not to visitors) and to the administrator.

LiveAlerts has two fundamental concepts - rules and outcomes:

Rules define the events that trigger an alert.

Outcomes define the alerts that are sent when rules are satisfied.

LivePerson Surveys

LivePerson provides administrators with the functionality to develop customized surveys in order to gather information and profile visitors, thus directing them more appropriately to a particular operator. There is also an operator survey that provides information about the content and success of chat sessions.

Surveys are enabled and configured from the Admin Console by the administrator.

There are four types of survey, as follows:

- **Pre-chat Survey**: When enabled, this survey pops up every time a visitor requests a chat session. The Pre-chat survey enables you to collect information about a visitor's needs prior to the chat, thereby providing a more timely and customized service. Typically this survey includes an identifier question to ascertain the name of the visitor. (The name is then displayed in the **Chatter ID** field of the Visitor's List rather than the IP address.) This survey may also include a skill question to ascertain whether the visitor wants to chat with an operator with particular skills. An operator can view the results of a Pre-chat survey in the **Info** tab in the Chat Interface.
- **Exit Survey**: When enabled, this survey pops up when a visitor ends a chat session. The Exit survey enables you to get useful feedback that may help to improve a visitor's experience. By default, this survey includes a question asking if the visitor would like to receive a transcript of the chat by email.
- **Offline Survey**: This survey is always enabled. It pops up when a visitor wants to chat but the operator is offline. The Offline survey enables the visitor to leave an email message. Usually this survey includes an identifier question to ascertain the name of the visitor, a skill question and an email question to collect details of the visitor's email to enable future communication.
- **Operator Survey**: When enabled, this survey is displayed in the Survey tab after a chat session is completed. The Operator survey enables you to understand the success and importance of the chat session. Typically, the Operator survey might include questions such as, "Should the visitor be contacted again?" or "Could you help the visitor?". This survey enables operators to categorize chats based on predefined questions and provides administrators with details about the nature and frequency of visitor's enquiries.

The procedures for enabling and configuring surveys are similar for all types of surveys.

Enabling Surveys

You must enable a survey in order for it to be available.

Note: The Offline survey is always enabled and cannot be disabled.

When enabling a survey, you can also modify the survey heading. This is the text that introduces the survey to the visitor/operator. In Exit surveys, you also specify the sender email details for when the visitor requests a chat transcript.

To enable a survey:

1. From the *Surveys* menu in the Admin Console, select the type of survey. The relevant Survey page is displayed.
2. Click the **Click Here to edit settings** link. The Edit Survey Settings page is displayed.
3. Enable/disable the survey by selecting/deselecting the checkbox and modify the survey heading as required.

Note: In the Exit survey, you should also specify sender email details for when the visitor requests a chat transcript.

4. Click **Update**.
5. Click **Submit All Changes** in the Survey page to update the system with any changes made to the survey settings.

Configuring Surveys

You can include any questions in a survey, as many or as few as you like. You should not overload a survey with questions as this might put off a visitor, especially the Pre-chat survey.

After specifying a question for a survey, you can select one of four answer formats, as follows:

- Text field, where the visitor/operator enters the answer in one line of text.
- Text area, where the visitor/operator enters the answer in multiple lines of text.
- Dropdown list (Select), where the visitor/operator selects an answer from a list of possible answers.
- Radio button, where the visitor/operator selects one answer from a choice of many.
- Checkbox, where the visitor/operator selects all applicable answers from a choice of many.

You can specify that a question in a survey is mandatory, meaning that the visitor/operator must provide an answer.

To configure a survey:

1. From the *Surveys* menu in the Admin Console, select the type of survey. The relevant Survey page is displayed.
2. Click the **Click Here to add a new question to the survey** link. The Add New Question page is displayed.
3. Enter a question in the **New Question** field.
4. Select the format of the answer in the **Answer Type** dropdown list.
5. If you selected an answer format where multiple answers are provided, enter the possible answers

in the **Add List Item(s)** field.

6. Select as many of the following checkboxes as required:
   - Required: The question must be answered.
   - **Visible**: The question is visible to the visitor/operator.
   - **Prepopulate answer with visitor's last choice**: An answer is provided based on the previous response to the question by the visitor/operator.
7. Click **Update**.
8. Click **Submit All Changes** in the Survey page to update the system with any changes made to the survey.

LivePerson Reports

Operators, you may not have permission to perform this task.

Reports are generated and viewed from the Admin Console. There are two types of report in LivePerson: Operations reports and Business reports.

Operations Reports

The available Operations reports are as follows:

- Operator Login/Logout
- Chat Volume
- Chat Opportunities
- Operator Performance
- Pre-chat/Exit Surveys Analysis
- Custom Variables Analysis
    - Custom Variables
    - Operator Survey
    - Pre-chat Survey
    - Exit Survey
    - Offline Survey

Reports can display information on an hourly basis over a selected 24-hour period or on a daily basis over a selected 30-day period.

Business Reports

LivePerson Business reports provide the ability to track visitors across your Web site and to quantify the impact that real-time chat has on visitor behavior. Site traffic, shopping-cart parameters and chat data are captured and summarized, providing powerful insight into your online sales and service processes. With LivePerson Business reports, you can answer several important questions regarding your online business:

- What is the average sale and total sales per day as a result of chat?
- What Web pages drive the most visitors and the most chats?
- How effective are my online operators in selling products and services?

You can define a new business report and LivePerson creates a report that includes 15 different subreports based on the information you provide.

Contact Professional Services at ps@liveperson.com to receive this feature.

Scoreboard

The LivePerson scoreboard provides statistics about the current situation regarding visitors to your Web site and operator activity. You can view information, as follows:

- The number of concurrent chats.
- The maximum number of chats per operator.
- The number of visitors on your Web site.
- The maximum waiting time (in seconds) visitors are waiting to chat.
- The length of the chat queue.
- The number of operators online.

Contact Professional Services at ps@liveperson.com to receive this feature.

Adding Tags to Email Signatures

Operators, you may not have permission to perform this task.

You can add a LivePerson Button tag to the signature of your email. This enables recipients of your email to chat with you at a simple click of a button.

The following procedure describes how to design an email signature that can comprise text as well as the LivePerson Button tag.

To embed a LivePerson Button tag in your email signature:

1. From the *Tools* menu, select **Add Email Signature**. The *Email Signature Settings* window is displayed.
2. Select the radio button that corresponds to your email software and click **Next**. The *Button Type* window is displayed.
3. Select the **LivePerson Button Gallery** option to use a predefined LivePerson button.

Note: To design your own button, click the **Customized Buttons** option. Clicking **Information** provides a description of the procedure.

4. Click **Next**. The *Button Gallery* window is displayed.
5. Specify the button to include in your email signature by selecting from the following fields:
   - **Language**: Select the language for the text on the button.
   - **Main Category**: Select the category of the button. There are currently three categories of buttons: **holiday** (for festive buttons), **liveperson** (for text-only buttons) or **woman** (for buttons with a female face).
   - **Sub Category**: Select the button within the selected category. Buttons are numbered in each category.

A preview of the selected button is displayed on the right side of the window.

Note: Click **View Images and Buttons** to access and browse the complete button gallery. Each button has several variations to cover situations when an operator is offline, away from the workstation, and so on.

6. Click **Next**. The *Signature Design* window is displayed.
7. Design your email signature by entering the text that you want to accompany the button in the text box and selecting whether it will appear on the **Left Side** or **Right Side** of the button.
8. Select the alignment for your email signature and click **Test**. A sample of the specified signature is displayed.
9. Click **Next**. The *Signature File* window is displayed.

10. Specify the name (and path) of the file to include the signature and click **Next**. The *Mail Signature* window is displayed confirming that a signature file has been created. If the specified file already exists, it is replaced with the new signature information.

Note: Click **Edit Signature** to further edit your signature.

11. Click **Finish**. The specified signature (that is, the text and the button) will appear on all the emails that you send.

See also:

Embedding Tags

Advanced Tags

Advanced Tags

LiveEngage and custom variables enable you to customize your LivePerson tags to learn more about visitors to your Web site and better understand their needs.

LiveEngage

With LiveEngage, you can automatically send a timed and context-sensitive chat invitation to your Web site visitors. Simply define when and which invitation you would like to send automatically. When the specified time parameters are met, an invitation to chat pops up. For example, you can decide to send a 15% discount offer to visitors who stay more than a minute on the page with a hot product and a 30% discount offer to visitors on a page with a slow-moving product.

Refer to http://www.liveperson.com/products/liveengage.asp for a description of LiveEngage.

LiveEngage is available in LivePerson Pro and LivePerson Corporate.

Custom Variables

Using custom variables, you can pull information from any Web-based application and have it at your operators' disposal while in a chat. For example, having such details as the value of the shopping cart or what items it contains can help the operator provide better service in order to cross-sell, up-sell or just know that they are chatting with a serious customer. The availability of this important, business-specific data makes your online operators more efficient in selling and servicing your customers.

You can display the data in real time for each visitor or only for visitors who request a call. The values for the variables are typically embedded dynamically in the HTML. The data can also be stored to generate customized reports and transcripts.

With custom variables, any Web-accessible information from your Web site or databases can be presented in the LivePerson Chat Interface to help your online operators.

Refer to http://www.liveperson.com/help/cv.asp for a description of how to implement custom variables.

Custom variables are available in LivePerson Corporate only.

See also:

Embedding Tags

Adding Tags to Email Signatures

LivePerson Dashboard

The LivePerson Dashboard provides an at-a-glance overview of traffic passing through your Web site and chat sessions with visitors.

The Dashboard is displayed automatically when you log in to LivePerson.

The Web Site Traffic graph shows the number of visitors to your Web site and the number of pages viewed per day for the last month.

The Chat Activity graph displays the number of chat sessions and the number of offline messages per day for the last month. Offline messages are messages sent by visitors who wanted to chat when there was no operator online.

The information on the right side of the Dashboard provides useful links to LivePerson news and features.

Defining Skills

Operators, you may not have permission to perform this task.

Note: Not all of these options may be available to an operator. The functionality available to an operator depends on the permissions assigned to the operator by the administrator.

Skills are used to control the distribution of chats to operator groups based on the nature of the chat. You can create as many new skills as required, modify the properties of existing skills and delete skills. Operators can be assigned as many skills as required. Refer to Configuring Operators.

The skill needs of a visitor can be ascertained via a specific question in the Pre-chat survey or using custom variables when embedding the LivePerson Monitor and LivePerson Button tags in your Web site. In this way, visitors requesting chats from a specific page of your Web site can be directed to an operator with appropriate skills and chats can be initiated with visitors on specific pages by operators with appropriate skills.

Skills are defined from the Admin Console.

To add a new skill:

1. From the *Administration* menu, select **Skills**. The Skills Administration page is displayed, showing a list of the skills currently defined in LivePerson.

Note: The **Operators** column indicates which operators are assigned the skill.

2. Click the link above the list to add a new skill. The Skill Properties page is displayed.
3. Enter a name and description for the skill in the relevant fields.
4. If required, enter an offline email address for the skill. This means that when a chat is requested with an operator with a specific skill and the operator is offline, an email can be sent to this email address. When no email address is specified here, offline emails are sent to the general email address specified in system settings.
5. If required, select whether to include this skill in Pre-chat and Offline surveys. Refer to LivePerson Surveys for more information.
6. Click **Update** to save your settings. The new skill appears in the list of skills in the Skills Administration page. The list of skills appears as options when configuring operators.

To modify the properties of a skill, click the name of the skill in the list on the Skills Administration page and modify the properties as required. To delete a skill, click **Delete** in the Skill Properties page.

See also:

Configuring Operators

Configuring Permission Groups

Configuring Permission Groups

Operators, you may not have permission to perform this task.

Note: Not all of these options may be available to an operator. The functionality available to an operator depends on the permissions assigned to the operator by the administrator.

Permission groups are used to control the functionality available to operators. When defining a permission group, you select the functionality that members of the group can access. By default, LivePerson has two permission groups: **Administrator** and **Operator**. The **Administrator** permission group enables access to all LivePerson functionality. The **Operator** permission group limits access to operator interface settings. When configuring operators, you must assign them to a permission group.

You can create as many new permission groups as required, as well as modify the properties of existing permission groups. You cannot modify the default **Administrator** group.

Permission groups are defined from the Admin Console.

To add a new permission group:

1. From the *Administration* menu, select **Permissions**. The Permission Groups page is displayed, showing a list of the permission groups currently defined in LivePerson.

Note: This list of groups provides the options in the **Permission Group** field when configuring operators.

2. Click the link above the list to add a new permission group. The Permission Group Properties page is displayed.
3. Enter a name and description for the permission group in the relevant fields.
4. Select the rights associated with the group by selecting the checkbox next to the right. For example, select the checkbox next to **Change Skills** to enable members of the group to define skills. For ease of use, rights are loosely divided into the following categories: **Administration**, **Maintenance**, **Change My Details**, **View Visitors in Operator Interface**, **Chat Options** and **Transcripts and Reports**.
5. When you have selected as many rights as required for the group, click **Update**. The new permission group appears in the list of groups in the Permission Groups page.

To modify the properties of a permission group, click the name of the group in the list of groups on the Permission Groups page and modify the properties as required. You cannot modify the default **Administrator** group.

See also:

Configuring Operators

Defining Skills

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Customer Login

HOME | ABOUT US | PRESS ROOM | INVESTOR RELATIONS | PARTNERS | HELP CENTER | CONTACT US

ABOUT US

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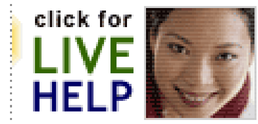

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- Financial Service
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LivePerson (NASD: LPSN) is a publicly traded company with offices in New York City and Israel.

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