

NETOP®

Live GUIDE™

Live Chat for Customer Engagement

Live Guide – Customizing the Customer Console



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1 Introduction

Netop Live Guide Customer console provides instant messaging features to the customer.

The customer can communicate with an operator in real-time by contacting the operator through a Web page: the customer clicks a button or chat text link on a Web page and Netop Live Guide opens in a new window.

This aim of the present article is to give system administrators an introduction to customizing the Live Guide Customer Console. The look and feel of the Customer Console depends on the chat button system administrators create in the Live Guide Administration console.

2 Customizing the Customer Console

When creating the Live Guide chat button, you are able to customize the language presets, company logo, the button image and the size of the customer console.

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 chats, for example “Sales” and “Technical Support”

The screenshot shows the 'Add new department' form. The 'Name' field is filled with 'Sales' and has a tooltip that says 'The department name will be visible to customers if they are asked to choose between multiple departments when placing a call.' The 'Description' field is filled with 'Entire sales team'. The form also includes a 'Cancel' button and a 'Save' button. The left sidebar shows the 'Setup' menu with 'Departments' selected.

2.2 Add operators

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

The screenshot shows the 'Add New Operator' form. The 'Name' field is filled with 'Kyle Bryant', 'Display name' with 'Kyle', 'Email' with 'kbryant@netop.com', and 'Department' is set to 'Sales'. There are 'Password' and 'Confirm password' fields with masked characters. The 'Skills' field is empty. The 'Locked' and 'Account administrator' checkboxes are unchecked. The left sidebar shows the 'Setup' menu with 'Operators' selected.

Enter the operator’s credentials (email and password) and select the department for which the operator will take calls from customers.

2.3 Customize language presets

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.

To customize language presets:

1. On the **Settings** menu, click **Language presets** and then the **Add new** button.

Settings > Language presets

Add preset Edit fields

Name *
e.g. English

Description
e.g. English texts for the Customer Console

Set as default

(*) Mandatory

2. Enter a name for the language presets you want to customize and click the **Next** button.

Description	Custom text	Original text	Options
Message to a customer who has been banned *	<input type="text" value="You are no longer allowed to contact a customer representative."/>	(63/101) You are no longer allowed to contact a customer representative.	<input type="button" value="Preview"/>
Due to database issues the Live Guide customer console cannot connect *	<input type="text" value="We have technical problems at the moment. We apologize and kindly ask you to get back to us later."/>	(99/100) We have technical problems at the moment. We apologize and kindly ask you to get back to us later.	<input type="button" value="Preview"/>
The Live Guide code on the Web page is incorrect *	<input type="text" value="There was an error on our Web page."/>	(35/100) There was an error on our Web page.	<input type="button" value="Preview"/>
Message to a customer that he or she was not transferred to another customer representative *	<input type="text" value="You were not transferred to another customer representative. You are now talking to {DisplayName}."/>	(98/100) You were not transferred to another customer representative. You are now talking to {DisplayName}.	<input type="button" value="Preview"/>

Once you have customized the language presets, click the **Save** button.

For detailed information on how to create texts for chat buttons, see [Live Guide System Administrator's Guide](#), section 2.5.

2.4 Customize forms

Forms are optional building blocks when you create a chat 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 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 chats.

Note: Forms are not available in Netop Live Guide Basic edition.

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

For details on how to create a form, see [Live Guide System Administrator's Guide](#), section 2.3.

2.5 Create campaign

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

Home

Setup

- Departments
- Operators
- Campaigns
- Code builder
- Operator console

Tools

- Canned messages
- Knowledge base
- Links
- Push page
- Forms
- Category

Settings

- Language presets
- Forms editor
- Proactive chat
- Bans
- Time
- Security
- Operator
- Customer
- Remote access
- Integrations

Reporting

- Statistics
- Customer data

Setup > Campaigns

Add campaign Add images Opening hours

Campaign name * Sales
e.g. Holiday campaign

Status * Active

Department * Dep1
Add department +

Language preset * English

Start date * 10-02-2015

End date

Video/audio * Chat

Pre-chat form Select form Mandatory

Post-chat form Select form Mandatory

Offline action Display offline form

Offline form Select form Mandatory

Display End chat button

Display Email chat button

(*) Mandatory

Cancel Next

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

2.5.1 Customize the 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.

The screenshot shows the 'Setup > Campaigns' interface with three tabs: 'Add campaign', 'Add images', and 'Opening hours'. The 'Add images' tab is active. It displays three sections for image customization:

- Logo image:** Shows the 'Netop' logo. Below it is a 'Browse...' button and the text 'No file selected.' with a required size of '110 x 30 pixels'.
- Offline image:** Shows a 'CHAT OFFLINE' button with a speech bubble icon and 'POWERED BY LIVE GUIDE™'. To the right is an information icon. Below it is a 'Browse...' button and the text 'No file selected.' with a recommended size of '200 x 150 pixels'.
- Online image:** Shows a 'CHAT NOW' button with a speech bubble icon and 'POWERED BY LIVE GUIDE™'. To the right is an information icon. Below it is a 'Browse...' button and the text 'No file selected.' with a recommended size of '200 x 150 pixels'.

At the bottom left, there is a note '(*) Mandatory'. At the bottom right, there are three buttons: 'Previous', 'Cancel', and 'Next'.

The image look is essential for the success of your campaign with respect to how many chats customers make: customers must be able to immediately recognize the button as a clickable area.

Once you have selected the online and offline images for your chat button, click **Next**.

2.5.2 Customize the opening hours

The weekdays and hours are the periods when the campaign is active and users can contact the departments that 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.

Setup > Campaigns

Add campaign > Add images > Opening hours

Split day Delete 08 : 00 - 17 : 00 Set Open all day Closed all day

<input type="checkbox"/>	Weekday	From		To
<input checked="" type="checkbox"/>	Monday	08:00	-	17:00
<input checked="" type="checkbox"/>	Tuesday	08:00	-	17:00
<input checked="" type="checkbox"/>	Wednesday	08:00	-	17:00
<input checked="" type="checkbox"/>	Thursday	08:00	-	17:00
<input checked="" type="checkbox"/>	Friday	08:00	-	17:00
<input type="checkbox"/>	Saturday	08:00	-	17:00
<input type="checkbox"/>	Sunday	08:00	-	17:00

Previous Cancel Save

Once you have set the opening hours for your campaign, click the **Save** button. The campaign will be created.

2.6 Create chat button

Once you have created a campaign, Live Guide is ready to automatically create chat button code to upload to a Web site.

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

Setup > Code builder > Website

Website Email

Step one: Select a campaign

Campaign

Sales

Step two: Select a department

Let the customer choose the department

Sales

Call button preview. Click it to test.

CHAT OFFLINE
POWERED BY LIVE GUIDE

Copy and paste the call button tag into your Website's HTML where you want this button to appear:

```
lgmain.netop.com/status.php?LiveGuideUID="+LGUID+"&from="+escape(window.location)+" alt="Live Guide Support" onload="(function()var _lgs=document.createElement('script');_lgs.type='text/javascript';_lgs.async=true;_lgs.src=document.location.protocol+'//clients-lgmain.netop.com/lgs.php?_lguid="+LGUID+"&_lgpid="+LGPID+"&_lgw="+LGCustomerWidth+"&_lgh="+LGCustomerHeight+'";var _s=document.getElementsByTagName('script')[0];_s.parentNode.insertBefore(_lgs,_s);})();</script><noscript><p><a href="https://clients-lgmain.netop.com/swf.php?LiveGuideUID=5gfhKTC-d8bZxlscb5alkZov8co&myurl=no%20javascript" rel="nofollow" target="_blank"> tag in order to use proactive chat invites and gather detailed customer information:

```
<!-- Netop Live Guide Monitor Tag --><script type="text/javascript">function LgTrackingTag(){var s=document.createElement("script");s.type="text/javascript";s.charset="utf-8";s.src=document.location.protocol+'//clients-lgmain.netop.com/track.php?LiveGuideUID=5gfhKTC-d8bZxlscb5alkZov8co&myurl="+escape(window.location);if(document.&& document.body){document.body.appendChild(s);}catch(e){}else document.write(s);}if(window.attachEvent)window.attachEvent("onload",LgTrackingTag);else window.addEventListener("load",LgTrackingTag,false);</script><!-- Netop Live Guide Monitor Tag -->
```

## 2.6.1 Customize the console size

Once you have created the chat button from the **Setup** menu > **Code Builder**, you can also customize the size of the Customer Console, by changing the values of the following two parameters: **LGCustomerWidth** and **LGCustomerHeight**.

```
<!-- Netop Live Guide Call Button Tag --><script
type="text/javascript">LGCustomerWidth=250;LGCustomerHeight=640;LGPID='Live
Guide_GoVodhUEB78og0ZbaGndZ6XQegZB1';LGUID='GoVodhUEB78og0ZbaGndZ6XQeP7oU6G
PLltEw';(function(){document.write('');})();</script><noscript><p><a href="https://clients-
lgmain.netop.com/swf.php?LiveGuideUID=GoVodhUEB78og0ZbaGndZ6XQeP7oU6GPL1tEw
&myurl=no%20javascript" rel="nofollow" target="_blank"></p></noscript><!-- Netop Live Guide Call Button Tag -->
```

**Note:** When you resize the Customer Console, the buttons and icons available will remain to the default size. However, if you resize the Customer console on Flash and the video camera is started, the video camera will be resized as well.