

LivePerson Pro Reference Card

LivePerson Pro - The Operator Console

The Operator Workflow

Follow these steps throughout your work day:

Starting My Day

- 1 Log into the LivePerson application using your Site ID, username and password.
- 2 Change your Chat status to **Online**.

Leaving My Desk Momentarily

- 2 Change your Chat status to reflect your availability. Select **Back in 5 minutes** from the list.

Ending My Day

- 3 Select Logout from the **File** menu.

Handling Chats

- 4 Take Chat requests.
- 5 View the Visitor list that displays information about your visitors such as the visitor history, current page and campaign variables.
- 6 Access additional information about the selected visitor in the **Information** panel. For instance, use the Info tab to view location and campaign information.
- 7 Chat in real time in the **Communication** panel.

Company Guidelines

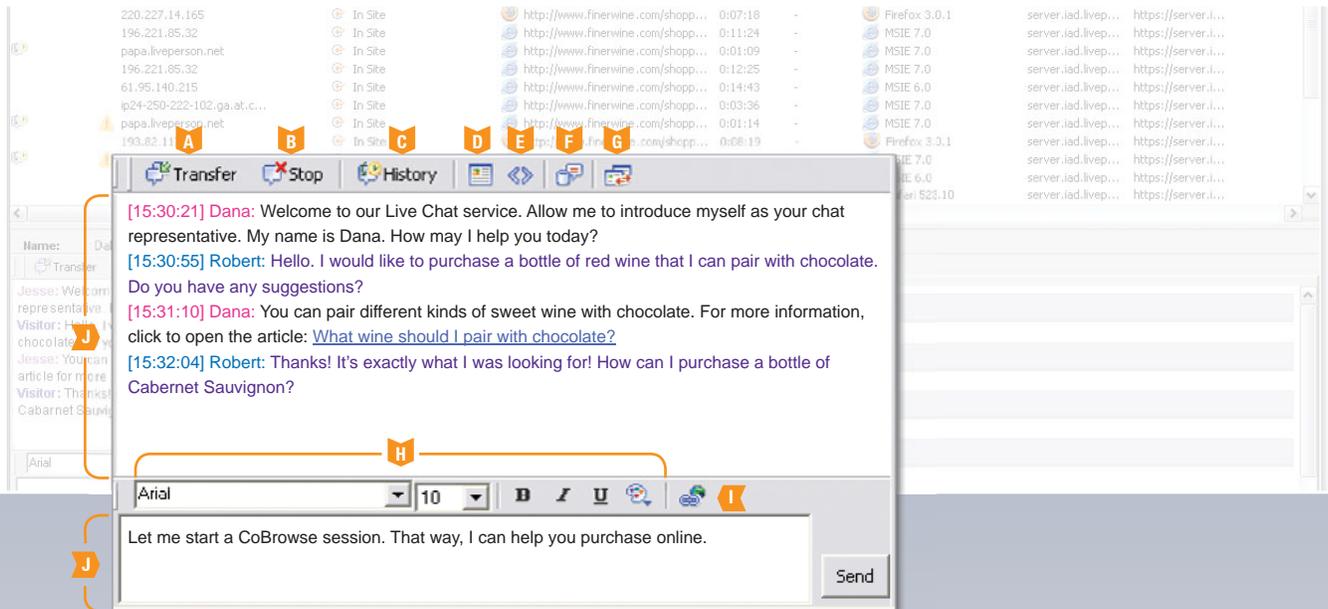
Add your company's guidelines for using chat:

Visitor List Icons

Check your visitor's state and history directly in the Visitor list:

-  **Repeat Visitor** - The visitor has previously been to your website
-  **Repeat Visitor With Chat History** - The visitor has previously been to your website and chatted with an operator
-  **Alert** - The visitor met pre-defined conditions which the operator should be aware of. Includes LiveKeyword, Visitor Rules and other Operator Alerts
-  **In Site** - The visitor is on a page that contains the LivePerson Monitor tag
-  **Waiting for Chat** - The visitor has requested a chat and is in the chat queue
-  **Chatting** - The visitor is engaged in a chat session
-  **Engaged or Invited** - An operator has requested a chat with the visitor
-  **Transferring** - You are transferring the visitor to another operator
-  **Chat Ended** - The visitor/operator ended the chat session
-  **No Chat** - The visitor has declined the invitation to chat
-  **Out of Site** - The visitor is no longer on a page that contains the LivePerson Monitor tag

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LivePerson Pro - The Communication panel

The Chat Toolbar

Use these tools to provide better chat experience:

- A Transfer:** Click to transfer a chat to another operator or a skill group. Add a note summarizing the chat to ensure fast resolution.
- B Stop:** Click to stop the chat session.
- C History:** Click followed by the History tab of the **Information** panel to view the visitor's chat history.
- D Push a Page:** Click to push a page to your visitors. Enter the URL to send.
- E Send HTML:** Click to send HTML links or images to customers while chatting.
- F Canned Responses:** Click to open the Canned Responses window. Select, edit, and send Canned Response(s) from the list while chatting.
- G CoBrowse:** Help your visitors complete online forms. Highlight or point to specific information on your website. Check that CoBrowse Support is set to "Yes" in the Info tab of the **Information** panel.
Click to start or end a CoBrowse session. The CoBrowse session is performed in the CoBrowse tab of the **Information** panel. To use the CoBrowse tools, right-click in the CoBrowse tab and select an option from the option list.
- H Text Formatting Tools:** Format the style and color of the fonts in your Chat window.
- I Send a Link:** Click to mask a URL as clickable text such as [Click Here](#).
- J Chat Session:** Use the Chat Typing area and the Chat Operator area to communicate with your customers. Be sure to follow the communication guidelines to standardize communication with your customers.

Hot Keys

Add your company's hot keys to the list:

	Open the Help page
	Accept next chat in queue
	Move to next chat awaiting response
	Open the Canned Responses window
	Copy text
	Paste text
	Cut text
	Delete text
	Select the next item in the list
	Select the previous item in the list