

**The Operator Workflow** 

Follow these steps throughout your work day:

Starting My Day

- 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

- 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
- Fransferring You are transferring the visitor to another operator
- $\checkmark$  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 Reference Card

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se: Welcom	Do you have any sugg	gestions?					1
esentarive. I	[15:31:10] Dana: You	can pair different kind	Is of sweet wine with chocolate. For	nore informa	tion,		
or: Hole IV	click to open the articl	e What wine should	pair with chocolate?				
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e for more	[15:32:04] Robert: Tha	anks! It's exactly what	I was looking for! How can I purcha	se a bottle of			
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## **The Chat Toolbar**

Use these tools to provide better chat experience:

- Transfer: Click for transfer a chat to another operator or a skill group. Add a note summarizing the chat to ensure fast resolution.
- 🖪 Stop: Click 💕 to stop the chat session.
- **B** History: Click P followed by the History tab of the Information panel to view the visitor's chat history.
- Push a Page: Click is to push a page to your visitors. Enter the URL to send.
- Send HTML: Click 《> to send HTML links or images to customers while chatting.
- Canned Responses: Click P to open the Canned Responses window. Select, edit, and send Canned Response(s) from the list while chatting.
- **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 is 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, rightclick 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.
- Send a Link: Click and to mask a URL as clickable text such as <u>Click Here</u>.
- 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:

F1	Open the Help page
F2	Accept next chat in queue
F3	Move to next chat awaiting response
F4	Open the Canned Responses window
Ctrl + C	Copy text
Ctrl + V	Paste text
Ctrl + X	Cut text
Ctrl + D	Delete text
Ctrl + <sup>△</sup> Shift + ↓	Select the next item in the list
Ctrl + Shift + 1	Select the previous item in the list

