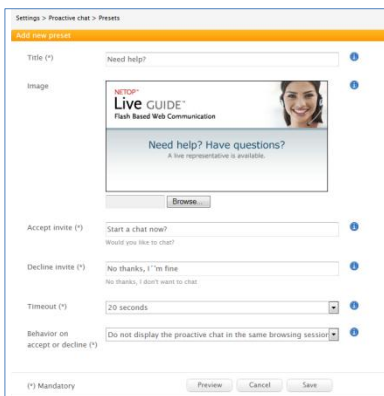NETOP™
Live GUIDE™

Set up proactive chat

When you have an active campaign with a call button live on a Web page, you can choose to define proactive chat to have Live Guide ask a browsing customer whether the customer needs assistance.

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

- Created a department.
- Added at least one operator from each department.
- Created a campaign and added the departments.

You set up proactive chat by clicking **Proactive chat** on the **Settings** menu. First you define proactive chat settings like the image to use, the greeting text, and how long the customer should be browsing before Live Guide proactively asks whether the customer needs assistance. Next you define on which Web pages the proactive chat should be active.

Define proactive chat

The **Title** is used to identify the proactive chat when adding it to a campaign; customers will not see this title.

The **Image** is used to initiate proactive chat; the illustration here uses a Netop image in .png format but any standard graphics file can be used.

When the customer clicks the text defined as **Accept invite**, he or she confirms that they want to start a chat whereas **Decline invite** is the text the customer clicks if he or she does not want to chat. The text is appended to the graphic, like this:

Use **Timeout** to define how long the customer should be browsing on the page before Live Guide proactively offers assistance by showing the above image.

Define proactive chat Web pages
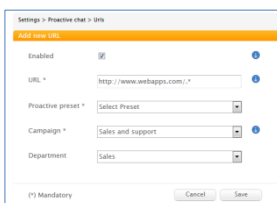
The URL defines the Web pages where the proactive chat is active. Use period and asterisk (.*) to indicate multiple pages; this combination stands for any characters. For example, if you write

.*webapps.com.*

then proactive chat will be active on all pages that include the string webapps.com; this could for example be these pages:

http://www.webapps.com/support/technical-support.htm
http://www.webapps.com/company/about.htm
http://www.webapps.com/purchase/pricing.html
https://webapps.com/help.htm

Note The period-asterisk combination MUST be the first and the last characters in the URL. This is to avoid situations where other domains are accidentally targeted. For example, if you mistakenly typed this URL: www.*webapps.com then you might accidentally also target these domains: www.bigwebapps.com, www.someotherdomainwebapps.com, www.wrongdomainwebapps.com.

If you do not use the period and asterisk and write, for example, http://www.webapps.com, the proactive chat will be active only on that specific page.

Note that all pages where you want proactive chat to be enabled must include the appropriate code; see the following section for details. This means that *even though* you write a very open string in the URL field, you can always limit the presence of proactive chat by placing the code only on specific pages.

Implement proactive chat on your Web pages

When you have defined proactive chat and proactive chat Web pages as described above, you can go on to enable proactive chat on your Web pages by placing the auto-generated code on all pages.

On the **Setup** menu, click **Code builder** and follow the steps on the page to have the code generated.

Then copy the code beneath the **Monitor tag** heading and paste it at the end of all pages, right before the </body> tag.

Verify that proactive chat works

When you have copied the code to your Web pages, you can verify that proactive chat works.

To test proactive chat you need to make sure that:

- An operator from the department that uses proactive chat is logged on to the Operator Console. The association between a campaign and proactive chat was created as part of defining proactive chat Web pages.

- The campaign is active.
  Check the campaign start and end date from the **Edit Campaign** page (**Setup** > **Campaigns** > **Edit**).

- The current time is within the campaign opening hours.
  Check the campaign schedule from **Opening hours** page (**Setup** > **Campaigns** > **Edit** > **Opening hours**).

Open one of the Web pages that you defined proactive chat for. Remain on the page without clicking any items for longer than the timeout you defined.

The proactive chat image now slides on to the Web page to offer assistance to the browsing customer.