About

NPO LiveChat

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NPO LiveChat is a powerful tool that allows you to reach your audience by adding a new dimension to your website. You can communicate with them in real time and provide immediate support.

Have you ever visited a website and wanted more information or needed assistance only to find that you either had to make a phone call or leave a message on the contact us page? Then when you called you found that "All agents are busy. Your call is very important to us. Please stay on the line for the next available agent." Or you filled out the form on the contact us page and after you submitted it you thought of a few more things you wish you had said. Frustrating, isn't it?

Just like you, the visitors to your website need to feel comfortable that you are there to support their needs. If they have questions or need help, you can provide the answer right away - when they need it - *right now*. ***NPO LiveChat*** lets you do that and you can do it *now*.

NPO LiveChat was developed with small organizations in mind. Most nonprofit organizations have small staffs and don't have the budget to purchase expensive phone systems to handle and route phone calls to the right person. Besides, automated attendant scripts that make you "Press 1 for this" or Press 5 for that" are annoying and don't guarantee that you'll eventually reach a human. And, in this day of telecommuting many staff members of small organizations work from home all or most of the time. Connecting the telecommuters to the office phone system is expensive and likely not in the budget. So… you need a solution that overcomes all of this, right? We agree and ***NPO LiveChat*** is your answer.

NPO LiveChat allows your website visitors to connect with you *right now*. It provides two-way communications so you can answer the visitor's questions or address their problem and solve the issue quickly and easily. It's easy to set up and even easier to use. And, better yet, you don't have to be in the office or even in the same country. ***NPO LiveChat*** is centrally hosted on ***NPO LiveChat*** servers that you and your website visitors can reach from anywhere and anytime. All you need is an Internet connection.

So, what's the catch? Here's the catch. You'll have to take two or three minutes to register for the service at the ***NPO LiveChat*** website and then take another few minutes to add a link on your website. Anything else? Nope. That's it. You're done.

When you register your account is automatically set up with default settings that allow you to be up and running in no time at all. Later, you can modify any or all of those settings to suit your needs. But, you don't have to change a thing. We've studied on this and chose default settings that pretty much work for everyone. But, you can tweak them if you want.

NPO LiveChat comes in two versions. The Basic version is free. No. It's not just free for 30 days. It's just plain ol' free. The Premier version isn't free, but it doesn't cost very much either. Not free, but not expensive. What's the difference in the two versions? Here's a small chart that shows you just that.

***NPO LiveChat* Comparison**		
Feature	**Basic**	**Premier**
Number of Agents	2	Unlimited
Number of Supervisors	1	Unlimited
Number of Account Managers	1	Unlimited
Supervisors/Account Manager Can Act as Agents	Yes	Yes
Number of Simultaneous Chat Sessions	Unlimited	Unlimited
Transfer Chat Session to Another Agent	Yes	Yes
Automatically Switch to Contact Us if Agents are not Available	Yes	Yes
Automatically Switch to Contact Us if Session isn't answered	No	Yes
View Visitor Session History	Yes	Yes
Customize Predefined Agent Messages	Yes	Yes
Customize Support Categories	Yes	Yes
Assign a Primary Agent to Each Support Category	Yes	Yes
Store/Search/Retrieve Chat Session Transcripts	Yes[1]	Yes[1]
Supervisors Can Monitor Active Chat Sessions in Real Time	Yes	Yes
Export Chat Session Logs to File	No	Yes
KnowledgeBase (KB)	Yes	Yes
Add Chat Session Transcripts to the KB	Yes	Yes
Add Free Form Records to the KB	No	Yes
Search the KB	Yes[2]	Yes[2]
Modify Control Parameters	Limited	All
Technical Support From ***NPO LiveChat*** [3]	Of Course	Of Course

1 – Supervisors and Account Managers.

2 – Agents, Supervisors and Account Managers.

3 – During normal business hours.

Now you're wondering if the Basic version will meet your needs. So are we. As you can see the Basic version is powerful and full of features. It may or may not meet all of your needs, but it's a good place to start.

At this point you may not be completely sure how much a live chat feature will be used by your visitors (constituents/clients/ volunteers) or how much traffic will be generated. You may not know how many agents you will need to handle the load. You could spend the time analyzing your requirements and developing a workflow study to find out. Or, you could just give it a try. The Basic version is certainly cost effective because it costs you no money and only a small amount of time to set it up.

If later you find that you need to upgrade to the Premier version it's simple to do. You won't lose anything that you've already done or anything you've saved away. You just get to do more of it. What could be easier?

Okay. So that's the pitch. If you're convinced that you need to give it a try, then just sign-up and you're in business. If you think you need more convincing (or maybe your boss needs more details) then turn the page and read on. There's a lot to say about this little product and we'll lay it out for you. So, enjoy.

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NPO LiveChat – The Big Picture

The exact way you implement *LiveChat* is going to depend, in large part, on the website development resources available to you. You will need to place a link on your website that will connect your visitors to your agents. Where you place the link(s) is entirely up to you and you'll probably decide that based on the way visitors navigate your site. You may already have a *Contact Us* page and that might be a good place for a *LiveChat* link. Maybe there's a page on your site that invites visitors to participate in an event or activity. That might be another good place for a link. Regardless of *where* you decide to place *LiveChat* links you'll need the ability to do just that.

The easiest implementation would be to place link(s) where you want them and let ***NPO LiveChat*** manage it from there. If your agents are active *LiveChat* will connect your visitor to the first available agent. If agents are not available *LiveChat* will switch to a hosted *Contact Us* page to capture the visitor's question/comment or display a predefined message of your choice.

You can also define your normal business hours and days (see *Account Manager* and *Message Manager*, below) so that even if agents are active, the visitor will be rerouted to *Contact Us* or receive the predefined message.

If you have a web developer on staff then you can take total control over which links are seen during what hours and on what days. The section below thoroughly explains the various link options with examples of the code necessary to implement them.

Getting Started with NPO LiveChat

There are just a few steps you need to take and then your live chat feature will be active.

1. Use the email address and password you entered when you registered to login to the ***NPO LiveChat*** website. Those are account manager credentials for your organization.
2. Use the *User Manager* (from the *Console*) to add live chat agents (and supervisors if you wish) to your account. Account managers and supervisors may act as agents by clicking on the *Agent Console* link from the *Console* page.
   Note: visitors to your website will not be able to initiate a LiveChat session unless agents are logged in and agent consoles are active.
3. Use the *Message Manager* to customize your predefined messages. Alternatively, you may simply use the default predefined messages that were created when you established your account.
4. Use the *Category Manager* to modify or add categories for chat sessions and the knowledgebase. Several default categories were created with your account. You can add what you need. You may also specify a primary agent for each category.
5. There are several control parameters you can set from the *Account Manager* page to customize your ***NPO LiveChat***.
6. Place a link on your website to ***NPO LiveChat***. There are a few ways to do that. The choice is yours.

- Use this image as a link.

  You can use JavaScript by embedding the following at the place you wish the image to appear:

```
<img src="http://www.npolivechat.com/images/NPOLiveChat_Icon.jpg"
style="cursor:pointer;"
onclick="window.open('http://www.npolivechat.com/live_chat_login.asp?id={YOUR
ACCOUNT ID}', 'livechat', 'width=550, height=600, resizable=yes, scrollbars=yes,
menubar=yes, toolbar=yes, status=no');" />
```

- Or use a button.

```
<input type="button" value="NPO LiveChat"
onclick="window.open('http://www.npolivechat.com/live_chat_login.asp?id={YOUR
ACCOUNT ID}', 'livechat', 'width=550, height=600, resizable=yes, scrollbars=yes,
menubar=yes, toolbar=yes, status=no');" />
```

- Or use an HTML link.

```
<a href="http://www.npolivechat.com/live_chat_login.asp?id={YOUR ACCOUNT
ID}" target="_blank" style="font-style:italic;font-weight:bold;color:#5d68a7;text-
decoration:none;">NPO LiveChat</a>
```

  Or to size the new window

```
<a href="#"
onclick="window.open('http://www.npolivechat.com/live_chat_login.asp?id={YOUR
ACCOUNT ID}', 'livechat', 'width=550,height=600,resizable=yes, scrollbars=yes,
menubar=yes, toolbar=yes, status=no');" style="font-style:italic; font-weight:bold;
color:#5d68a7; text-decoration:none;">NPO LiveChat</a>
```

- Whichever method you decide to use the link must contain your account id as follows:
  http://www.npolivechat.com/live_chat_login.asp?id={YOUR ACCOUNT ID}
  to properly identify the *NPO LiveChat* account the visitor is accessing.

7. That's it. You're in business. Enjoy!

If you want to use an ***NPO LiveChat*** image to indicate that agents are not available you may use one of the following images:

You can use JavaScript by embedding the following at the place you wish the image to appear and adding the URL to the contact us page on your website:

You can also simply display an icon indicating that agents are not available by embedding the following at the place you wish the image to appear:

Each agent/supervisor/manager account creates a unique session at login. Therefore, only one session for each account on any computer is allowed at the same time. If you open a browser session using the same credentials on the same or another computer, the first session will be destroyed. The same is true for the visitor sessions. *Note: the construction of the links shown above prevents a visitor from opening two sessions in the same browser at the same time.*

You may test ***NPO LiveChat*** by opening the visitor's session using one browser (such as Internet Explorer) and opening the agent's session using another browser (such as Firefox, Safari or Chrome). This ensures that the sessions will not conflict with each other. Copy this URL address and paste it into the *other* browser (visitor) for testing:
http://www.npolivechat.com/test.asp?id={YOUR ACCOUNT ID}.

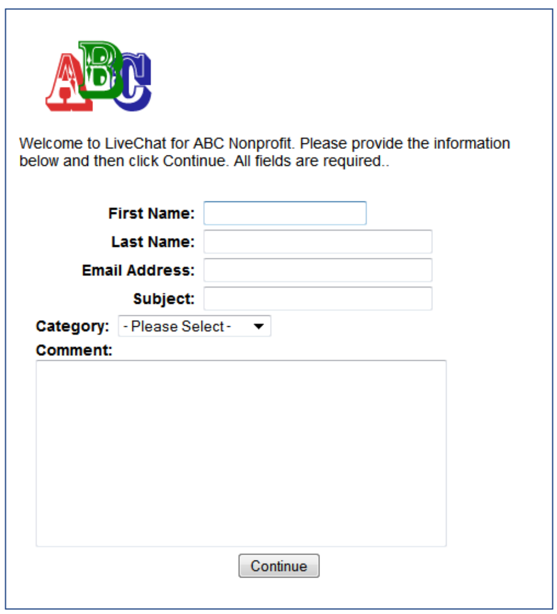
NPO LiveChat requires that the browser be configured to allow session cookies and JavaScript.

From the Visitor's Point of View

The link to *LiveChat* can be placed anywhere on your website that you wish. You may wish to prominently display it on your home page or you may want to put it on your support page or even your contact us page. The link can be an image, a button or just a plain link (see Getting Started in the previous section).

You have total control of what the link is and how it looks. If you have the development resources you can make the link change depending on the time of day or day of the week. You just need to make sure that when the link is active it points to http://www.npolivechat.com/ live_chat_login.asp?id={YOUR ACCOUNT ID} where {YOUR ACCOUNT ID} is replaced by your actual account id. You can find your account id on the *Account Manger* page after you login.

When the visitor clicks on the *LiveChat* link the system will determine if one or more of your agents are available and, if you choose to use it, if the current day and time are within your normal business hours/days. If all this turns out to be true the visitor is invited to login. They will see a screen similar to this:



Welcome to LiveChat for ABC Nonprofit. Please provide the information below and then click Continue. All fields are required..

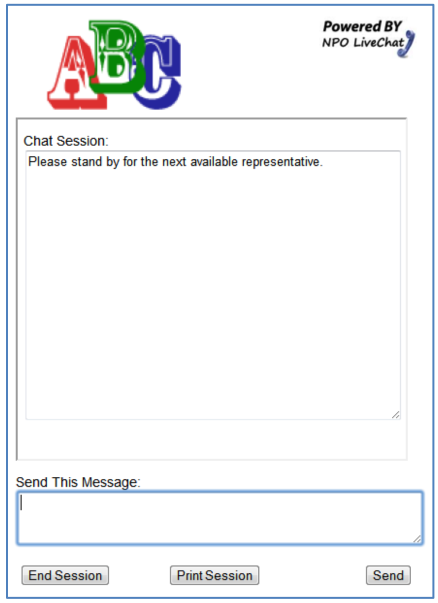
First Name:
Last Name:
Email Address:
Subject:
Category: - Please Select -
Comment:

Continue

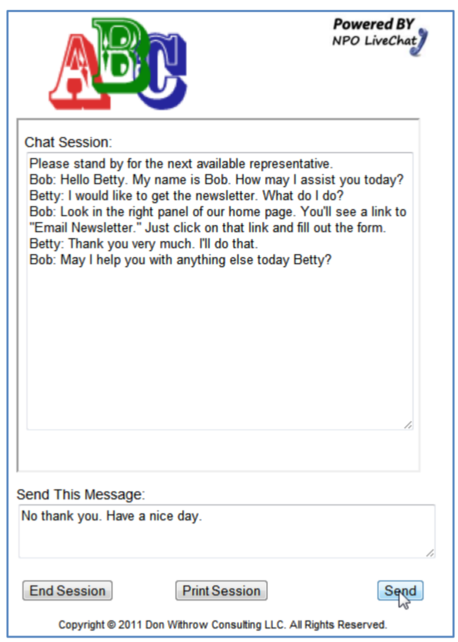
Once the visitor completes this form they will be shown the *LiveChat* page.

LiveChat uses the visitor's email address as a unique identifier and creates a new visitor record if needed. This allows the system to track returning visitors.

Once the *LiveChat* page appears (see below) the session will be added to the queue for all active agents.



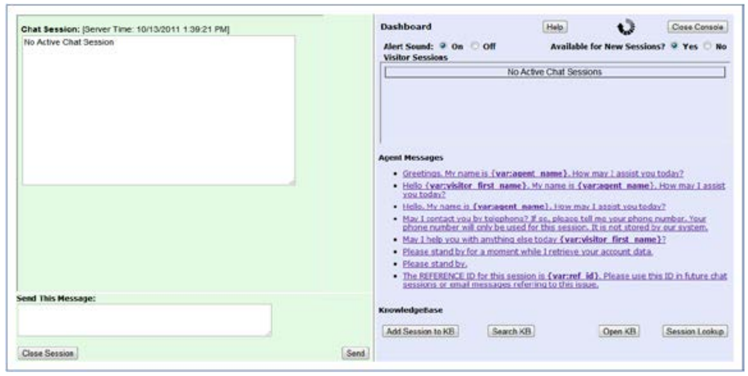
The conversation between the visitor and agent would then progress normally. Maybe something like this:



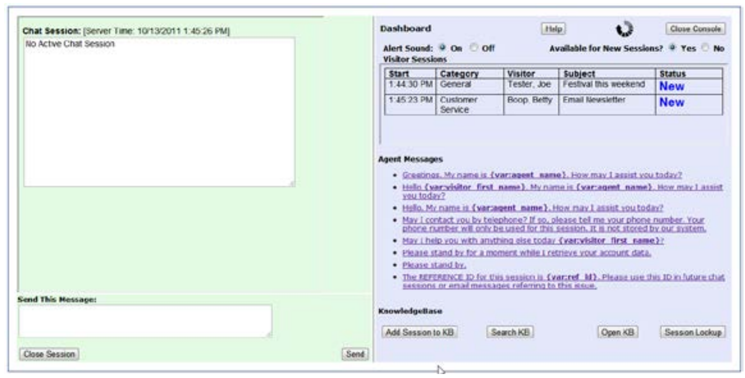
If none of your agents are available or the current day and time are not within your normal business hours the visitor will either be switch to a hosted *Contact Us* page or see a message (customized by you) informing them that agents are not available. You may customize this message at any time to say as much or as little as you wish including your normal hours and days of operation.

From the Agent's Point of View

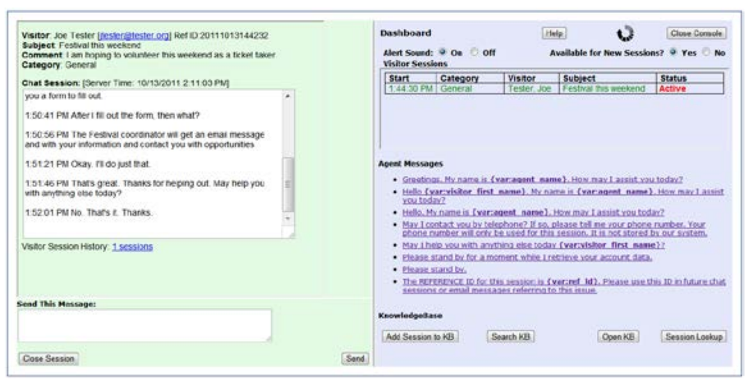
When there is no activity the agent's console is idle and shows that there are no active chat sessions. The agent can perform other tasks from the console like search or add records to the KnowledgeBase (KB) when the console is idle. The agent can also work with the KB when sessions are active.



As visitor chat sessions enter the queue they are added to the visitor sessions list in the right panel of the console for all active agents. An agent can leave their console open and indicate that they are not available for new sessions by clicking the appropriate radio button at the upper right of the right panel. This is a handy feature when an agent is working with multiple chats or needs to leave their computer for a break.



The account manager may assign a primary agent to any category. When a visitor logs in to *LiveChat* they are required to select a category. If a primary agent *is not* assigned to the category selected, then the chat appears in all active agents' consoles. If a primary agent *is* assigned to the category selected the chat will initially only appear in that agent's console. If the primary agent is not active or does not select that session within the time limit (see *Account Manager*) the session will appear in all agents' consoles.



When the agent clicks on a session link the console is connected to that visitor and that session link disappears from other agent consoles.

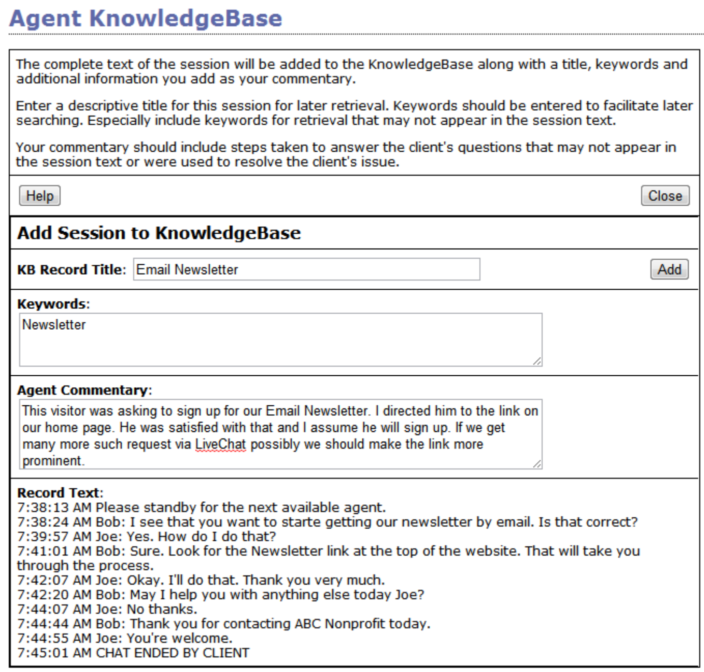
Once the chat connection is made the agent can see the visitors name, email address, the chat subject, the visitors comment/question and the category above the chat text. This aids the agent in answering the visitor's question quickly. Predefined messages are available in the right panel to provide consistency for typical responses. When the agent clicks on a predefined message, it is first loaded into the Send This Message box and sent when the agent clicks the Send button or enter a carriage return (Enter). These messages are managed by the account manager (see *Message Manager* below).

If this visitor has used *LiveChat* before (using the same email address) a session history link will be shown below the chat session box.

During the conversation the system keeps track of idle time. A predefined timeout parameter (default is 2 minutes) will cause an alarm to sound at the agent console to remind the agent that the conversation is idle. A message sent by either the agent or the visitor resets the timeout counter.

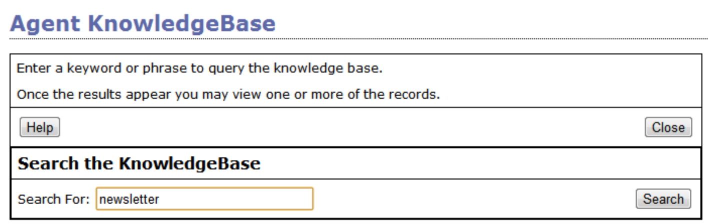
When the visitor closes the session the timeout parameter is ignored.

Once the session is closed by the client, the agent can either permanently close the session or add it to the KB. The decision to add the session to the KB should be based on the value of the session content for use in future sessions with other visitors or later analysis of KB records. When adding the session to the KB the agent will be able edit the record title and enter keywords (for later searching) and a commentary that is essentially a summary of the conversation or the question/problem that prompted the session.

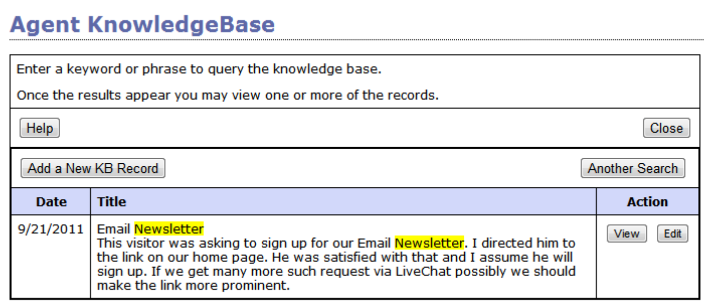


Once this record has been added to the KB it is immediately available to all other agents, supervisors and account managers.

When searching the KB the system searches for the keywords/phrase in the title, keywords, commentary and record text.



If records are found a listing will be presented highlighting the search keywords found in the title and commentary.



The agent can then view the KB record to assist a future visitor and, if necessary, copy text from the KB record and paste into the current conversation. The agent can also edit the KB record to add more keywords or modify the commentary. The chat session record, by default, cannot be modified.

From the Account Manager/Supervisor Point of View

When the agent logs in, he/she is taken directly to the Agent Console. When they close the console they are logged out and returned to the public home page. Account managers and supervisors have other work to do so at login they are taken to a console that will allow them to access several important modules that control the features of ***NPO LiveChat*** and lets them manage the KB, sessions, messages, categories and users.

The account manager and supervisor consoles are similar with the supervisor having access to a subset of modules that the manager uses. This discussion will explore those modules and indicate if access is restricted to the account manager. We'll address them alphabetically.

Account Manager Module (account manager only)

This module allows the account manager to modify organization and contact information and several control parameters. The organization and contact information is mostly self-explanatory as you can see below.

Account Manager

Your organization (account) information is listed below including your point of contact. The organization name is used within the application when organization name is show to a visitor.

If you have a suitable logo for use with the application located on the Internet, you may enter a URL in the Logo Address field. For best results the logo must be properly sized.

The contact information will only be used internally by NPO LiveChat to contact your organization about NPO LiveChat matters. This information is not displayed to your visitors or used for any other purpose.

The control parameters below were initially set to the default values when your account was established. Use these parameters to further define the way ***NPO LiveChat*** works for you.

*required	Help
Organization Information	
Account Id:	bs7t05t20t002
*Organization:	ABC Nonprofit
*Address:	123 West East Street
*City:	Midland
*State/Province:	Texas
*Postal Code:	79701
Country:	UNITED STATES
Time Zone:	Central Time Zone (-1)
Logo Address:	http://www.npolivechat.com/images/ABC-Nonprofit.png
For best results your logo should be 72dpi and 200 pixels wide. The format should be .jpg, .gif or .png with a white background.	
Contact Information	
*First Name:	Bob
*Last Name:	Brown
*Email:	bbrown@abcnonprofit.org
*Phone Number:	555-555-1212

Two of the organization information items need a bit of explanation: Time Zone & Logo Address. The ***NPO LiveChat*** servers are located in the eastern time zone of the United States. The server times automatically switch to daylight saving time and standard time as appropriate.

If you wish to have the times recorded and displayed match your time zone you can change that as desired. If you would like your logo to appear as the visitor logs in and chats with an agent, then provide a fully qualified URL address to the desired logo. For best results your logo should be 72dpi and no more than 200 pixels wide. The format should be .jpg, .gif or .png with a white or transparent background.

There are several control parameters the account manager can use that affect the *LiveChat* experience for both visitors and agents. These are available in the lower portion of the *Account Manager* page.

Control Parameters	
Business Hours:	Start: 8 am End: 5 pm
Business Days:	☑ Sun ☑ Mon ☑ Tue ☑ Wed ☑ Thu ☑ Fri ☑ Sat
Allow KB Chat Session Edit:	◉ No ○ Yes *(Default: No)*
Refresh Time:	15 Seconds *(Default: 15 seconds)*
Hold Session for Primary Agent:	120 Seconds *(Default: 60 seconds)*
Send Auto Response After:	90 Seconds *(Default: 90 seconds)*
Auto-Response: *(See Message Manager)*	*All of our agents are currently serving other visitors. An agent will be with you as soon as possible. Thank you for your patience.*
Maximum Auto Responses:	2 Times *(Default: 2 times)*
Switch to Contact Us After Max Responses?	○ No ◉ Yes *(Default: No)*
Switch to Contact Us If Agents Are Not Available?	○ No ◉ Yes *(Default: Yes)*
Visitor Inactivity Time-out:	10 Minutes *(Default: 10 minutes)*
Sound Alarm After:	120 Seconds *(Default: 120 seconds)*
Number of Unanswered Sessions Before Alert:	0 *(Default: 2; Enter 0 to turn off)*
Send Idle Sessions Alert To:	*(Default: Primary Contact)*
Alert Sound:	Bicycle Bell Test *(Default: Bicycle Bell)* (Selected Alert Sound: Bicycle Bell)
	Save

Let's discuss each of the control parameters. All control parameters are available in the **Premier** version. Only Business Hours, Business Days and Alert Sound are available in the **Basic** version.

<u>Business Hours</u>. Enter the start and end times when agents are going to be available (possibly your normal business hours, but not necessarily). Enter them in the format of hh:mm am/pm. If a visitor attempts to initiate a chat session outside of these hours/days they will receive the "Agents Not Available" message (see *Message Manager*).

<u>Business Days</u>. Check the days when your agents will be available. If a visitor attempts to initiate a chat session on a day not checked they will receive the "Agents Not Available" message (see *Message Manager*). You can use macro variables in the *Message Manager* to include business hours and days in the "Agents Not Available" message.

<u>Allow KB Chat Session Edit</u>. Answer Yes or No. The default is No. If this parameter is set to yes then account managers and supervisors will be allowed to edit the content of a chat session when

editing the KB record. This only applies to KB records that contain chat session conversations. You might wish to edit the conversation to remove superfluous text that adds no value to the KB. Regardless, the full text of the chat conversation is recorded elsewhere and cannot be changed. Chat records can be accessed through the *Recent Chat Sessions* page. The default is No.

Refresh Time. The number of seconds the chat boxes and dashboard will refresh. The default time is 15 seconds. Setting this time too low will cause the chat box to blink often. Setting this time too high will create a lag in agent/client communication. The default refresh time is 15 seconds.

Hold Session for Primary Agent. If you have designated primary agents for support categories (See *Category Manager*) the session will appear in the primary agents sessions list first if that agent is active. The session will appear in all active agent session lists after this time if not answered by the primary agent. The default timeout is 60 seconds.

Send Auto Response After. When a client logs in to *LiveChat* a standard response ("Please standby for the next available agent.") is sent. If an agent does not enter the chat session within this time the "All agents busy auto-response" will be sent (see the *Message Manager*). The default is 90 seconds.

Maximum Auto Responses. The auto-response will only be sent to the visitor this number of times before the agent enters the session. The default is 2 responses.

Switch to Contact Us After Max Responses. Answer Yes or No. If the session is not answered after the maximum number of auto-responses have been sent the visitor will be switch from the chat box to a contact us page if this parameter is set to Yes. If this is set to No the session will remain active and idle until answered. The default is No.

Switch to Contact Us If Agents Are Not Available. Answer Yes or No. If you choose to leave an active link to ***NPO LiveChat*** on your website you can use this option to redirect visitors to a contact us page if agents are not available or if it is after your normal business hours. When the visitor sends their message it automatically is sent to the primary contacts email address and is placed in the contact us database (See the *Contact Us Manager*). The default is Yes.

Visitor Inactivity Time-out. If there is no activity from the client chat box for this number of minutes and the client has not ended the session, the session record in the *Agent Console* will indicate that the client is inactive. The same notation will be made if the client ends the session without an active agent. The default is 10 minutes.

Sound Alarm After. When a session has been idle for this period the alarm will sound on the *Agent Console*. The default is 120 seconds.

Number of Unanswered Sessions Before Alert. As new chat sessions are added to the queue but not answered by an agent, an alert email will be sent to the account manager or the email address (usually a group) specified in the field below. This allows managers and supervisors to take corrective action as necessary when too many unanswered chats are sitting in the queue. The default is 2 unanswered sessions. Enter a zero to turn this feature off.

Send Idle Sessions Alert To. By default unanswered sessions alert email will be sent to the account manager’s email address. If you want the email sent to a different address, enter it here. The default is the primary contact.

Alert Sound. There are around two dozen alert sounds to choose from. You may select and test them here and when you’ve selected the one you want for the account, simply save the record. The account manager can also select different sounds for each agent in the *User Manager* module, if desired. The default is the Bicycle Bell sound.

Agent Console

This allows the account manager and supervisor to act as agents. This opens the agent console in a separate window (See the discussion “From the Agent’s Point of View”, above).

Category Manager (account manager only)

Categories are used to classify live chat sessions and knowledgebase records. Categories that are active will be shown to visitors as they login to ***NPO LiveChat*** and when add/editing records in the knowledgebase.

These categories are specific to your account. You may add categories as you wish and they will be displayed along with other active categories in the order listed.

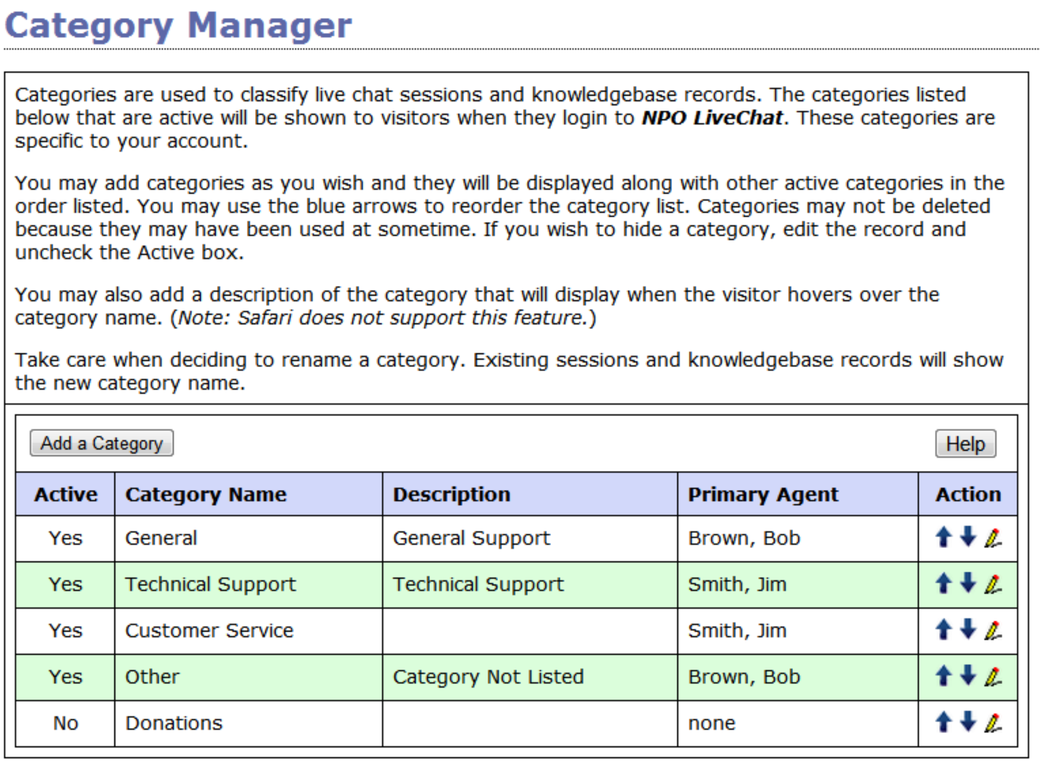
The Category Name will be included in drop-down lists. The Description will appear as the user hovers over the category name with their mouse cursor. (*note: the description does not appear with Chrome or Safari*.)

You may use the blue arrows (↑↓) to reorder the category list.

Categories may not be deleted because they may have been used at some time. If you wish to hide (inactivate) a category, edit the record and uncheck the Active box.

Take care when deciding to rename a category. Existing sessions and knowledgebase records will show the new category name.

You may assign a primary agent to any category. When a visitor logs in to *LiveChat* they are required to select a category. If a primary agent *is not* assigned to the category selected, then the chat appears in all active agents’ consoles. If a primary agent *is* assigned to the category selected the chat will initially appear only in that agent’s console. If the primary agent is not active or does not select that session within the time defined by the “Hold Session for Primary Agent” field (see *Account Manager*, above), the session will appear in all agents’ consoles.


Category Manager

Categories are used to classify live chat sessions and knowledgebase records. The categories listed below that are active will be shown to visitors when they login to ***NPO LiveChat***. These categories are specific to your account.

You may add categories as you wish and they will be displayed along with other active categories in the order listed. You may use the blue arrows to reorder the category list. Categories may not be deleted because they may have been used at sometime. If you wish to hide a category, edit the record and uncheck the Active box.

You may also add a description of the category that will display when the visitor hovers over the category name. (*Note: Safari does not support this feature.*)

Take care when deciding to rename a category. Existing sessions and knowledgebase records will show the new category name.

Add a Category | Help

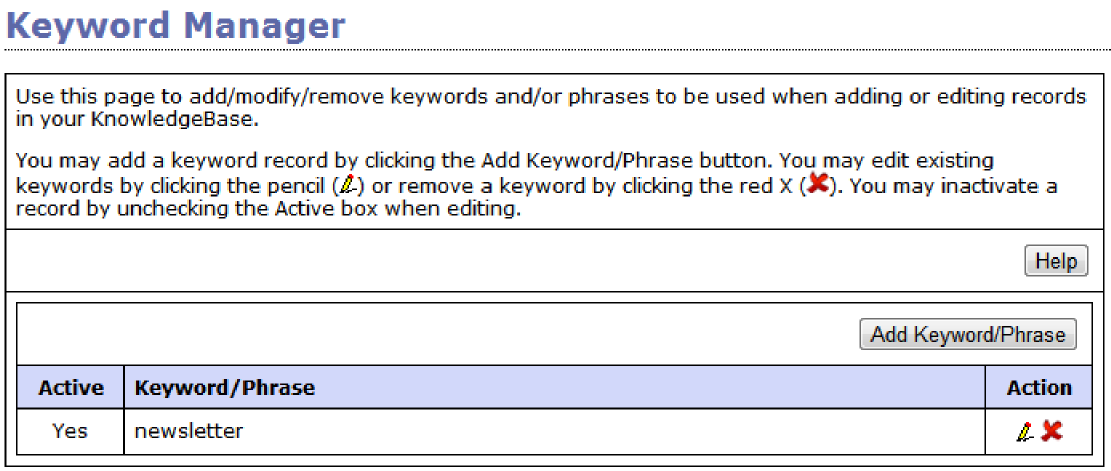
Active	Category Name	Description	Primary Agent	Action
Yes	General	General Support	Brown, Bob	
Yes	Technical Support	Technical Support	Smith, Jim	
Yes	Customer Service		Smith, Jim	
Yes	Other	Category Not Listed	Brown, Bob	
No	Donations		none	

Get Started (account manager only)
This page contains the same information/instructions starting on page 5, above.

Keyword Manager
Keywords and phrases may be used to classify records in the KnowledgeBase. They allow you to glean more information from a given record without studying its content.

When searching the KnowledgeBase keywords/phrases associated with a record are included in the query results. It is especially important to add keywords that describe something about the record that is not actually contained in the record.

When agents add records to the KnowledgeBase, including chat conversations, the text of the record is parsed to extract and record keywords/phrases. Additionally, any keywords directly added to the KnowledgeBase record's keywords field will automatically be added to the keyword table.



KnowledgeBase

This is *your* KnowledgeBase (KB) and is specific to your account and chat activity. Use it to record conversations that might be useful later and may be retrieved by query. You may also add records to the KB that are not chat sessions, but contain essential information that may be retrieved by account users to support your mission.

The *KnowledgeBase Manager* allows you to list all records, records by agent or records by category. Once listed you may view or edit any record listed. When listing all records you may use a search term to narrow the list.

Adding a New KB Record

There are five fields in a KB record: KB Record Title; Category; Keywords; Agent Commentary; and Record Text. All text fields are stored in the KnowledgeBase as plain text to facilitate searching. The only formatting allowed are line breaks (carriage returns).

KB Record Title. The title should be descriptive enough to give the reader an idea of the record's content when viewing from a list of records. The title is included when the KnowledgeBase is searched.

Category. Categories are established by the account manager and are used by visitors when initiating a chat session and in categorizing KB record. Care should be taken when assigning categories. The category may be changed when editing a KB record. The category chosen by the visitor is included in the chat session text, but you may wish to change the category in the KB record.

Keywords. Keywords and phrases add meaning to the information contained in a record. While the category creates distinct grouping of KB records in a coarse manner, keywords further categorize KB content that define the content within a category and across categories. Keywords are especially valuable to associate a concept or theme to the content when not described in the commentary or record text.

Agent Commentary. This is an abstract or summary of the record. This text should be descriptive enough to allow the user to determine whether the record will address the issue being researched without having to read the record text.

Record Text. This is free form text containing the meat of the issue contained in the KB record.

Adding Chat Sessions to the KnowledgeBase

Before closing a chat session the agent has the opportunity to add the session to the KB. When a session is added to the KB the record on the *Recent Chat Sessions* page will show only the View button in the action column. However, if the session has not been added to the KB the KB+ button will be shown in the sessions list. The account manager or supervisor can then add the session to the KB.

When the session is added to the KB via the *Recent Chat Sessions* page the chat record may be modified to eliminate any superfluous text before saving (See "Allow KB Chat Session Edit", above). This does not modify the chat record itself - only the version that is added to the KB.

Searching the KnowledgeBase

You may search the KB using keywords or key phrases. The keyword/phrases are used in the query exactly as entered.

You may use wildcards by adding a percent sign (%) as a wildcard within the keyword or phrase to broaden the scope of your search. The query automatically uses wildcards at the beginning and end of your search term.

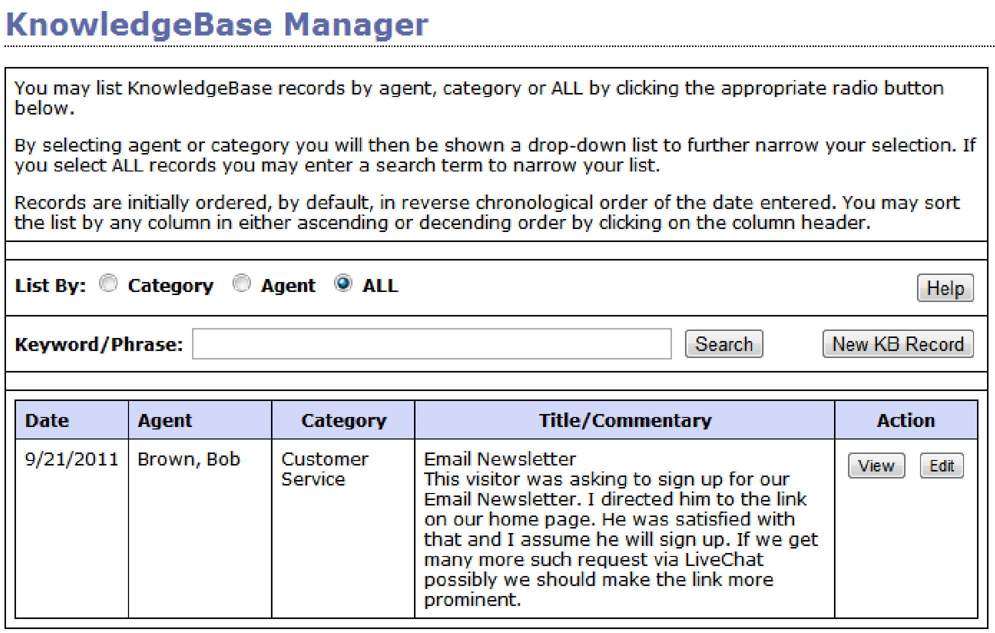
When you View the KnowledgeBase record search terms are highlighted. However, if you use a wildcard (%) inside your search term there is no highlighting.

Viewing/Editing a KB Record

Once a list of KB records has been rendered you may click the View button or the Edit button. Viewing simply shows the contents of the record (with highlighting if searched). Editing exposes the five fields discussed above for modification. Each time a record is edited, the date, time and user's name are recorded.

Reordering the Record List

By default, records are initially ordered in reverse chronological order of the date entered. You may sort the list by any column in either ascending or descending order by clicking on the column header. Once clicked, an arrow will be displayed along with the column head to indicate the sort order.



Message Manager (account manager only)

The Message Manager allows you to add/edit/remove predefined messages used by agents during *LiveChat* sessions.

Use the pencil () to edit a predefined message. Use the red X () to permanently delete the message. You may use the blue arrows () to reorder the agent messages.

The “Agents Not Available”, “All agents busy auto-response”, “Login Welcome”, “Session Welcome” and “Contact Us” messages cannot be deleted or renamed. These messages are automatically displayed to visitors when they initiate a chat session.

All other messages appear in the right panel of the Agents Console. When the agent clicks on the message the text is placed in the agent's chat send box ready to be sent to the visitor. All macro variables are resolved before the message is placed in the chat send box.

There are four macro variables that can be included in the predefined agent message text. Make sure you copy and paste them exactly as shown below.

{var:visitor_first_name} - this is replaced by the customer's first name given at login.
{var:agent_name} - this is replaced by the agent's first name.
{var:organization_name} - this is replaced by your organization name from your account record.
{var:ref_id} - this is replaced by the unique reference id of the visitor's session.

There are a six other macro variables that may be used for the "Agents Not Available" message. The values for these macro variables are taken from fields in the *Account Manager*. They are:
{var:business_hours_start} - this is replaced by the Business Hours Start field.
{var:business_hours_end} - this is replaced by the Business Hours End field.
{var:business_days} - this is replaced by a listing of each day from the Business Days field(s).
{var:first_business_day} - this is replaced by the first day from the Business Days field(s).
{var:last_business_day} - this is replaced by the last day from the Business Days field(s).

{var:timezone} - this is replaced by the value in the Time Zone field.

These variables might be used in a message such as "Our normal business hours are from {var:business_hours_start} to {var:business_hours_end} on {var:business_days}."
or
"Our normal business hours are from {var:business_hours_start} to {var:business_hours_end} {var:timezone}, {var:first_business_day} through {var:last_business_day}."

Message Manager

This page allows the account manager to add/edit/remove predefined messages used by agents during *NPO LiveChat* sessions.

Use the pencil () to edit a predefined message. Use the red X () to delete the message.

The "Agents Not Available", "All agents busy auto-response", "Login Welcome", "Session Welcome" and "Contact Us" messages cannot be deleted or renamed. These messages are automatically displayed to visitors when they initiate a chat session.

There are four macro variables that can be included in the predefined message text. Make sure you copy and paste them exactly as shown below.
{var:visitor_first_name} - this is replaced by the customer's first name given at login.
{var:agent_name} - this is replaced by the agent's first name.
{var:organization_name} - this is replaced by your organization name from your account record.
{var:ref_id} - this is replaced by the unique reference id of the visitor's session.

Help

Active	Message Name	Message Text	Action
Yes	Agents Not Available	Welcome to Live Chat for {var:organization_name}. We apologize, but our agents are currently unavailable. Our normal business hours are from {var:business_hours_start} to {var:business_hours_end} {var:timezone}, {var:first_business_day} through {var:last_business_day}.	
Yes	All agents busy auto-response	All of our agents are currently serving other visitors. An agent will be with you as soon as possible. Thank you for your patience.	
Yes	Login Welcome	Welcome to LiveChat for {var:organization_name}. Please provide the information below and then click Continue. All fields are required.	
Yes	Session Welcome	The next available {var:organization_name} agent will be with you in a moment.	
Yes	Contact Us	Live Chat for {var:organization_name}. Our agents are busy with other visitors. Please leave us a message and we will contact you as soon as we can.	
Yes	Hello	Hello. My name is {var:agent_name}. How may I assist you today?	
Yes	Session Reference Id	The REFERENCE ID for this session is {var:ref_id}. Please use this ID in future chat sessions or email messages referring to this issue.	
Yes	Hello Personal	Hello {var:visitor_first_name}. My name is {var:agent_name}. How may I assist you today?	
Yes	Greetings	Greetings. My name is {var:agent_name}. How may I assist you today?	
Yes	Further Assistance?	May I help you with anything else today {var:visitor_first_name}?	
Yes	Retrieve Account Data	Please stand by for a moment while I retrieve your account data.	
Yes	Please Stand By	Please stand by.	
Yes	Request Phone Number	May I contact you by telephone? If so, please tell me your phone number. Your phone number will only be used for this session. It is not stored by our system.	

Add Message

Recent Chat Sessions

The Recent Chat Sessions page allows you to see a listing of chat sessions that occurred during a specific time period. You may designate the time period by entering the beginning and ending activity dates and clicking the Refresh button.

All sessions for the designated period are listed unless a search term is entered. You may narrow the sessions listed by entering a search term and clicking the refresh button. To remove the search term delete the text in the search term field. You may also narrow the listing by selecting a category and/or agent.

Sessions are initially ordered in reverse chronological order by default. You may sort the list by any column in either ascending or descending order by clicking on the column header (except Answered & Total columns).

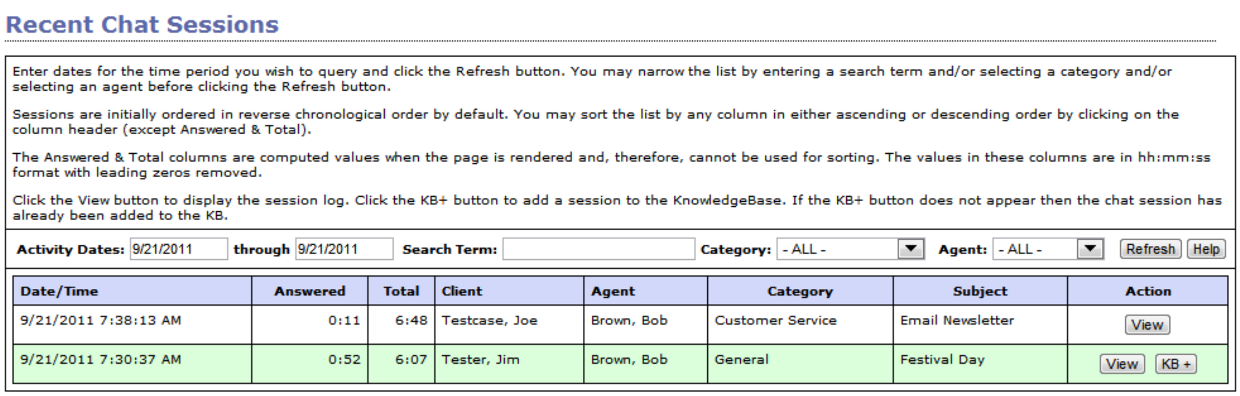
The Answered & Total columns are computed values as the page is rendered and, therefore, cannot be used for sorting. The values in these columns are in *hh:mm:ss* format with leading zeros suppressed.

The Answered column is the time it took an agent to enter the chat session and send a message starting from when the visitor initiated the session. If the session was never answered by an agent then 'n/a' will appear in that column. If the session was never answered the agent associated with the session is the agent that closed the session. All sessions must be closed to remove them from the *Agent Console*.

The Total column is the total session time (*hh:mm:ss*).

You may display the session log by clicking the View button.

Click the KB+ button to add a session to the KnowledgeBase. If the KB+ button does not appear then the chat session has already been added to the KB.



Recent Chat Sessions

Enter dates for the time period you wish to query and click the Refresh button. You may narrow the list by entering a search term and/or selecting a category and/or selecting an agent before clicking the Refresh button.

Sessions are initially ordered in reverse chronological order by default. You may sort the list by any column in either ascending or descending order by clicking on the column header (except Answered & Total).

The Answered & Total columns are computed values when the page is rendered and, therefore, cannot be used for sorting. The values in these columns are in hh:mm:ss format with leading zeros removed.

Click the View button to display the session log. Click the KB+ button to add a session to the KnowledgeBase. If the KB+ button does not appear then the chat session has already been added to the KB.

Activity Dates: 9/21/2011 **through** 9/21/2011 **Search Term:** **Category:** - ALL - **Agent:** - ALL - Refresh Help

Date/Time	Answered	Total	Client	Agent	Category	Subject	Action
9/21/2011 7:38:13 AM	0:11	6:48	Testcase, Joe	Brown, Bob	Customer Service	Email Newsletter	View
9/21/2011 7:30:37 AM	0:52	6:07	Tester, Jim	Brown, Bob	General	Festival Day	View KB +

Reports

Various reports are available that list selected system data to assist managers and supervisors assessing system usage and agent activity.

There are currently two reports available: Agent Statistics and Daily Statistics. Other reports are planned and will be developed over time. Additional reports will be developed as requested by account managers if time and resources permit.

<u>Agent Statistics</u>. This report allows you to select a time period and see the activity of all active agents during that period. Agents are listed in alphabetical order. Four data elements are computed for the specified period: Average Daily Time (time the agent console is active), Number of Chats during the period, Average Answer Time (time after the visitor enters the chat until the agent responds) and Average Chat Time (length of chats).

If the current date is included in the report period, computed times may not include any chats that are in session or agents with active consoles.

A typical report might look like:

Agent Statistics

Enter dates for the time period you wish to query and click the Refresh button.

Agents will be listed in alphabetical order is they opened their agent console during the period. The averages will be listed for available time, answer time and chat time along with the number of chats during the period.
Note: if the available time seems excessive then the agent probably is not closing the agent console at the end of the day.

Activity Dates: 10/1/2011 **through** 10/13/2011 Refresh Help

Agent	Avg Daily Time	Chats	Avg Answer	Avg Chat
Brown, Bob	8:20:48	11	1:00	9:58

Daily Statistics. This report lists, by date, the number of Visitors, number of active Agents, the number of chats, the average Answer Time, the average Chat Time and the average Agent Availability.

As is the case with Agent Statistics, above, open sessions and agents may not be included.

A typical report might look like:

Daily Statistics

Enter dates for the time period you wish to query and click the Refresh button. By default only dates when agents are available will be listed. If you wish to see all dates in the period click the Show All Dates box and refresh.

If the current date is included in the period, Agent Availability will be less than the actual time if agent consoles are still active.

Activity Dates: 10/1/2011 **through** 10/13/2011 Refresh **Show All Dates** Help

Date	Visitors	Agents	Chats	Answer Time	Chat Time	Agent Availability
Thursday, October 06, 2011	3	1	3	2:46	14:06	22:33
Friday, October 07, 2011	5	1	8	0:24	11:29	1:36:58
Monday, October 10, 2011	0	1	0	0:00	0:00	4:51:28
Thursday, October 13, 2011	2	1	2	1:01	4:54	41:17

User Manager (account manager only)

The User Manager allows the account manager to add, update or remove the agent, supervisor and account manager records for your account.

When you registered for ***NPO LiveChat*** an account manager record was created along with your organization's account record. You can make changes to your organization's account record through the *Account Manager*. You can use the *User Manager* to manage all users for your account.

User Roles

Only account managers have access to the features listed on the *Managers Console* including the *User Manager*. You may add additional account managers as needed (Premier only). Agents, once logged in, only have access to the *Agent Console* and the *Agent KnowledgeBase*. An intermediate level of access/functionality is provided for supervisors. Supervisors have access to a subset of features from the Managers Console: *Agent Console*; *Keyword Manager*; *KnowledgeBase*; *Recent Chat Sessions*; *Reports* and *Visitors*.

Account Managers and Supervisors may act as agents as well. You may wish to add users that are specifically agents so that they only have access to the *Agent Console* and the *Agent KnowledgeBase*.

When account managers login into the system they are taken directly to the *Managers Console*. When an agent logs in they are taken directly to the *Agent Console*. When the agent closes the *Agent Console,* they are logged off the system and are marked as unavailable.

Adding Users

When a new record is created for an account manager, supervisor or agent, only the basic user information is required. The users email address must be valid and is used as their unique identifier. A temporary password (npolivechat) is assigned to each new record. That password may only be used for initial login. On initial login the system will require that the temporary password be changed and a password recovery question and answer provided.

The basic information contained in the *User Manager* is fairly self-explanatory. A few require more information.

The agent's status is indicated as INACTIVE or ACTIVE. If, for some reason, an agent closes the agent console without properly closing the console the system believes that agent is still active and available. It could be that the agent's computer froze and required a reboot or maybe they shut down their computer without closing the console. Who knows? The account manager can inactivate that agent's console from the *User Manager*.

You may remove an agent at any time by just clicking the Remove User button. However, if you only wish to disable the account, you may uncheck the Active box and save the record.

Premier account managers can customize the alert sound for each agent. This is handy if several agents share close space to eliminate confusion.

Most account managers will only have a few users to deal with. However, if they have many users we've provided a way to narrow the list by user role and filter with word fragments for last name, organization or email. The list is populated when any radio button is clicked.

Removing Users

You may temporarily disable a user's account/access by unchecking the Active box and saving the record. If you wish to permanently remove a user's record, simply click the Remove User button. You will be warned before permanently removing the record. Remember, the account manager is the only user in your organization that can access the *User Manager*. Be sure not to remove all account manager records. If you inadvertently do so, please contact ***NPO LiveChat*** for assistance.

Viewing User Activity

Many user actions are recorded in an activity log. Most of the activity recorded is used for diagnostic purposes by ***NPO LiveChat*** support staff and developers. However, you may find many activities interesting in assessing the use of *LiveChat* for your organization.

Agent Alias

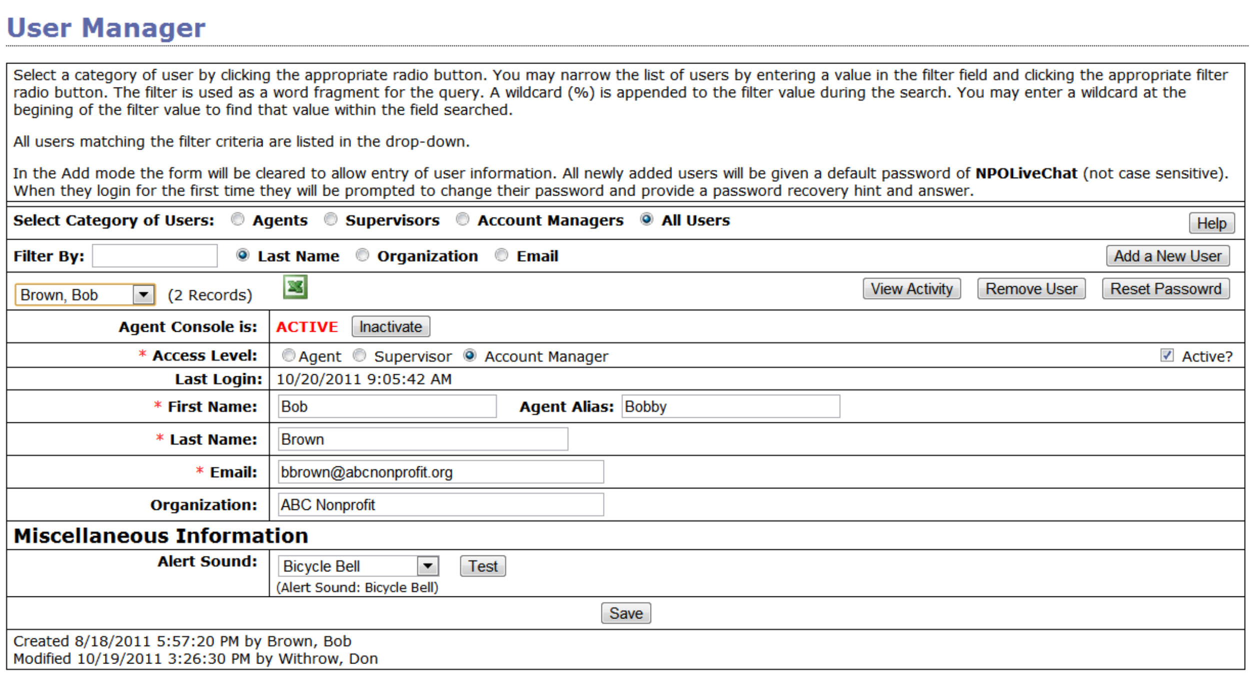
The agent's name displayed to the visitor and recorded in the transcript by default is the agent's first name recorded in the agent's record. However, if you wish to use an alias for the agent, you may enter it here and save the record.

Security

For security you may not see user passwords or recovery information. However, you may reset the users password to a randomly generated string that is emailed directly to the user. The password must be changed and recovery data provided at login.

User's may change their own password from the login page. They may also recover (reset) their password from the login page.

For security, the system keeps track of the last five passwords used by each user. When changing their passwords users will not be allowed to reuse those recent passwords.



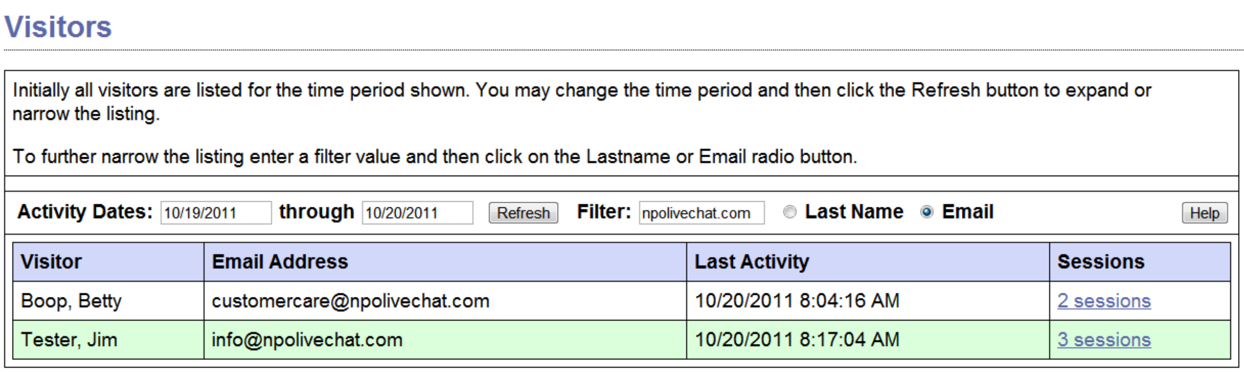
Visitors

The *Visitors* page allows you to see a listing of visitors who used *LiveChat* during a specific time period. You may designate the time period by entering the beginning and ending activity dates and clicking the Refresh button.

All visitors for the selected period are listed unless a search term is entered. You may narrow the visitors listed by entering a filter and clicking the last name or email radio button. To remove filtering leave the filter field blank or enter the wildcard character (%).

The listing is in alphabetical order and lists the visitor's name, email address, the date and time of their last activity and a link to view the visitor's sessions during the period selected.

The sessions link will show you the chat session transcript for all sessions that occurred during the specified period. If you want to view all sessions for a visitor just make the activity period large enough to capture all sessions and use the filter to restrict the scope of the list.


Visitors

Initially all visitors are listed for the time period shown. You may change the time period and then click the Refresh button to expand or narrow the listing.

To further narrow the listing enter a filter value and then click on the Lastname or Email radio button.

Activity Dates: 10/19/2011 **through** 10/20/2011 Refresh **Filter:** npolivechat.com **Last Name** **Email** Help

Visitor	Email Address	Last Activity	Sessions
Boop, Betty	customercare@npolivechat.com	10/20/2011 8:04:16 AM	2 sessions
Tester, Jim	info@npolivechat.com	10/20/2011 8:17:04 AM	3 sessions