



EasyLiveChat

User Guide
Version 2.0

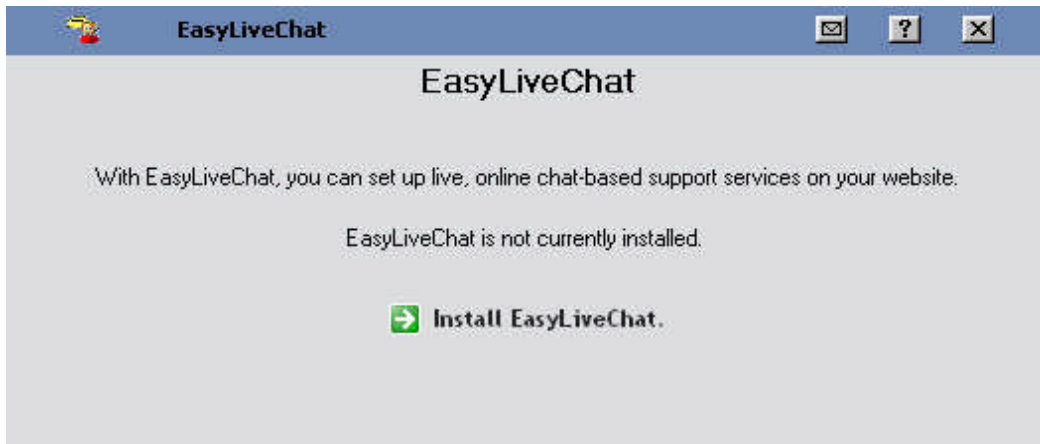


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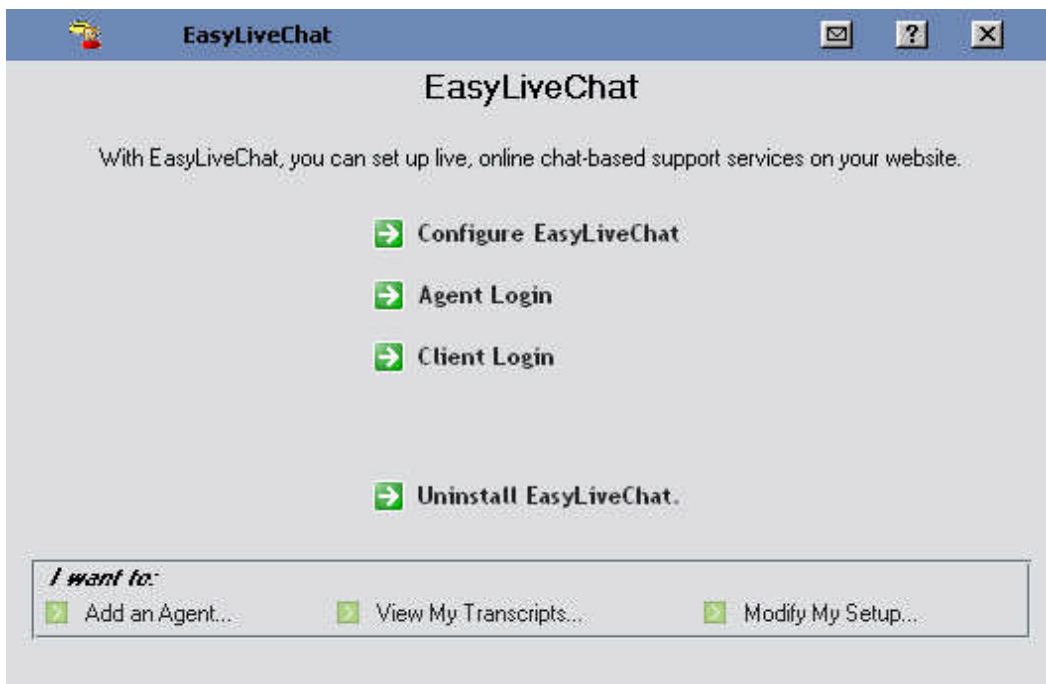
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1 Install Easy Live Chat

1. Click the **Install EasyLiveChat** link.



Once you have installed EasyLiveChat, whenever you return to the first screen thereafter it will look like the following image.



2. Select from:
 - Configure EasyLiveChat
 - Agent Login
 - Client Login
 - Uninstall EasyLiveChat
 - Add an Agent*
 - View my Transcripts*
 - Modify My Setup*

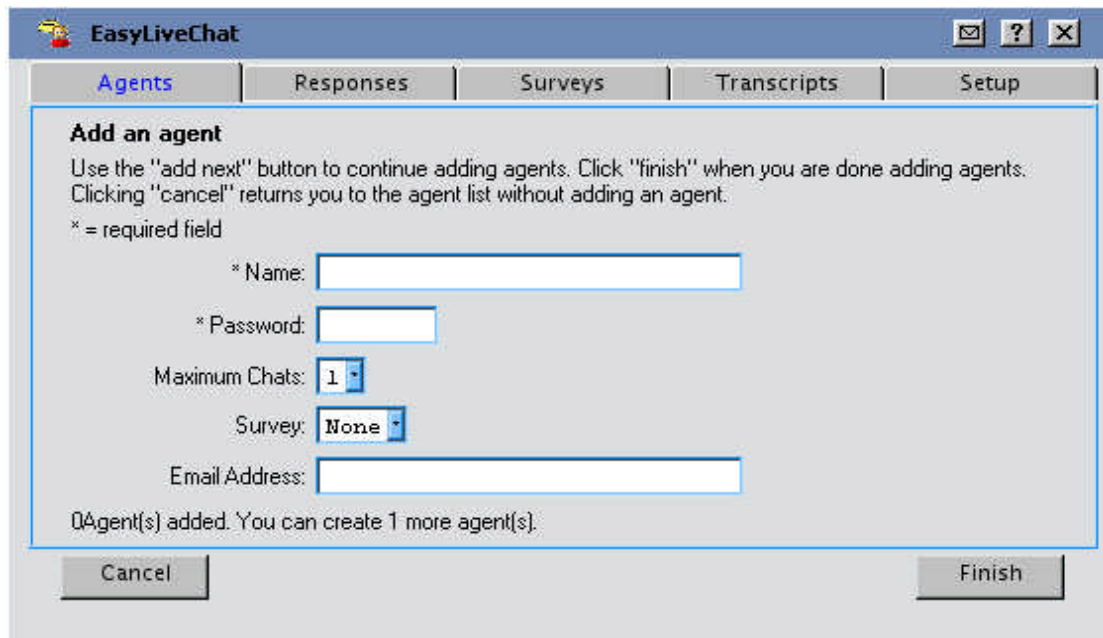
* These options can also be reached later by clicking the Configure "EasyLiveChat" link at the top, and choosing the corresponding tab.

2 Tabs in Easy Live Chat

- Agents
- Responses
- Survey
- Transcripts
- Setup

2.1 Agents

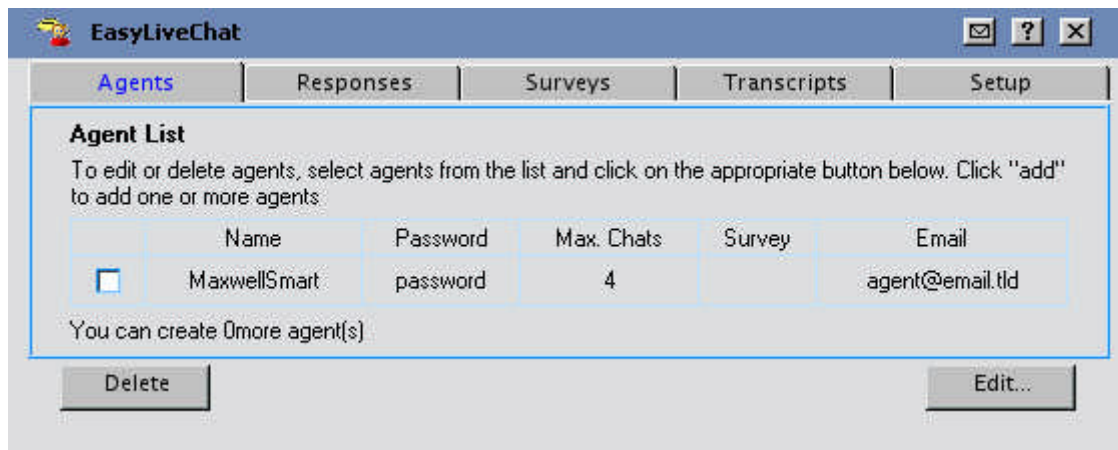
1. Type in agent **Name**.
2. Type in agent **Password**.
3. Select the number of maximum chats from the drop down.
4. Select the survey-type from the drop down.
5. Enter agent email address.
6. Click **Finish**.



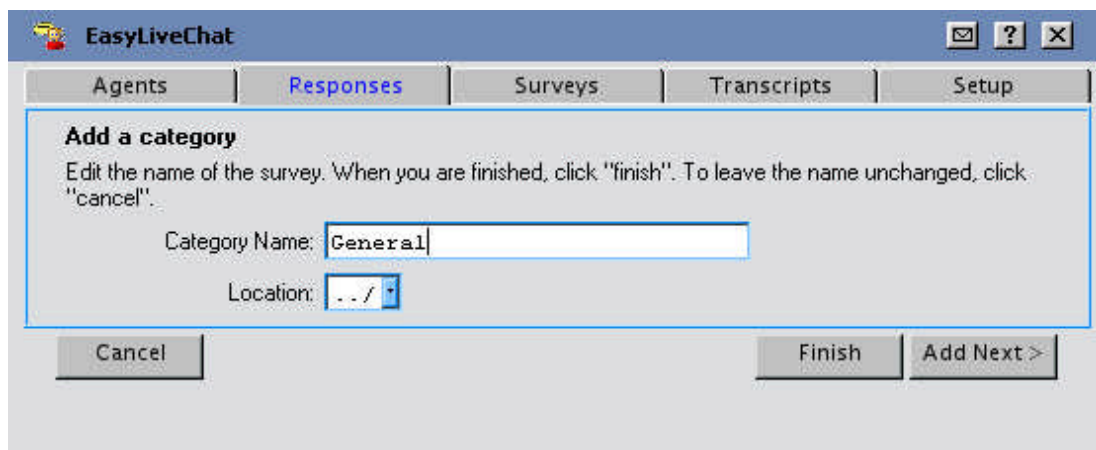
The screenshot shows the 'EasyLiveChat' application window with a tabbed interface. The 'Agents' tab is selected. The 'Add an agent' dialog box is open, containing the following fields and controls:

- Add an agent** (Section Header)
- Instructions: "Use the 'add next!' button to continue adding agents. Click 'finish' when you are done adding agents. Clicking 'cancel' returns you to the agent list without adding an agent."
- * = required field
- * Name:
- * Password:
- Maximum Chats:
- Survey:
- Email Address:
- Feedback: Agent(s) added. You can create 1 more agent(s).
- Buttons: and

Note: "Maximum Chats" defines the number of simultaneous chats the agent can participate in at once. These chats will appear in individual tabs in the agent chat window.



Note: You may modify agent information by selecting from the “Agent List;” and clicking either **Delete** to remove agent login or **Edit** to make changes.

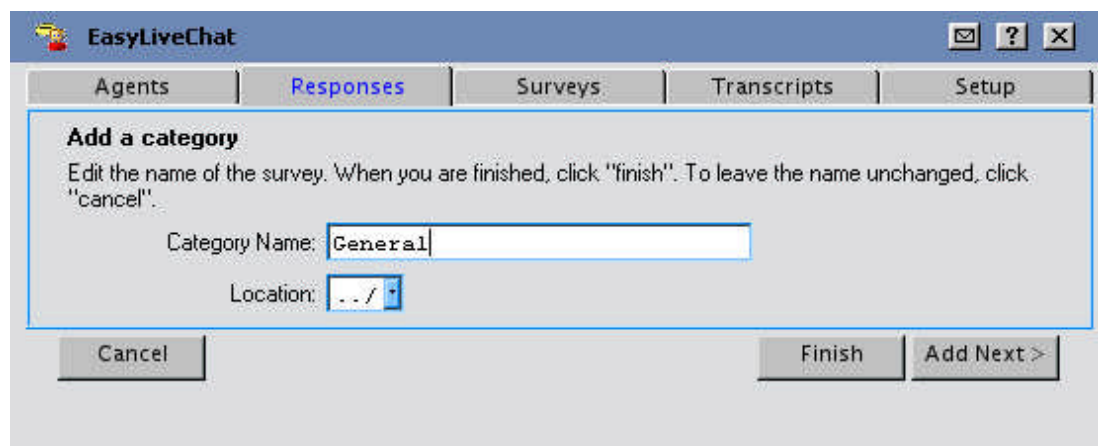
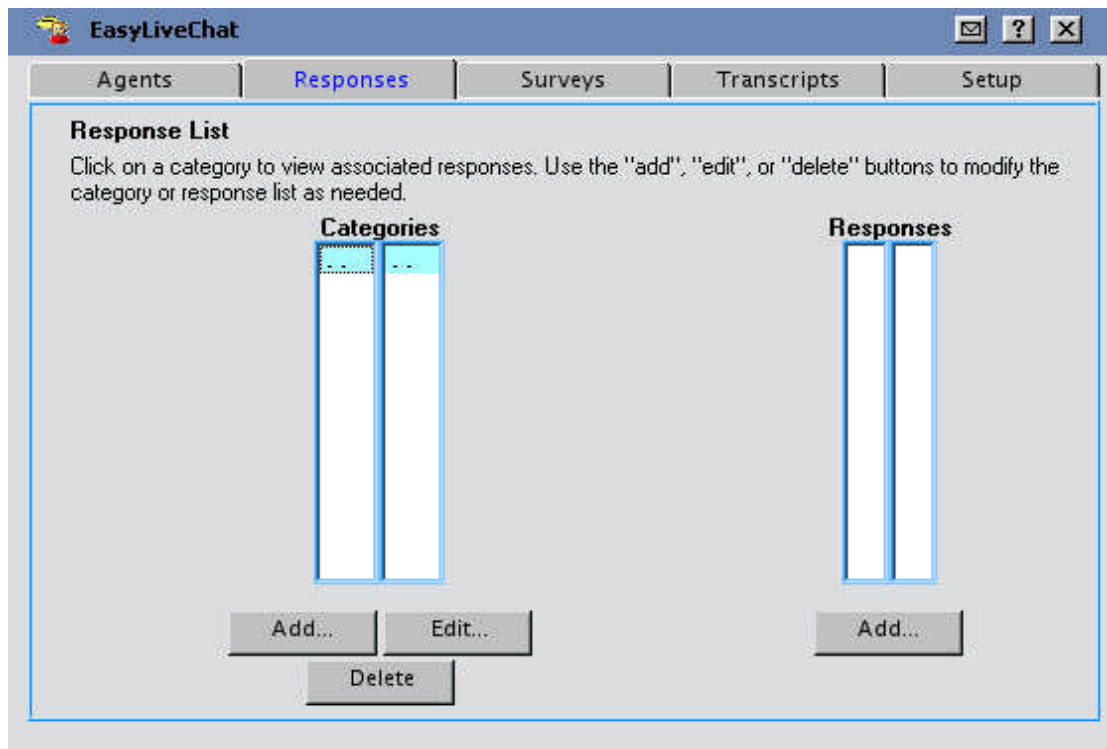


2.2 Responses

Add/Edit a Category

In the Heading beneath Category

1. Click **Add**.
 - Or Click on the Category you wish to modify
2. Click **Edit**.
3. Type in Category Name.
4. Select a location (Optional).
5. Click **Finish**.



Add a Response

1. In the heading beneath Responses, complete the following:
2. Click **Add**.
3. Select type of Response (i.e. Text/URL).and fill in appropriate details.
4. Select a Category.
5. Click **Finish**.

EasyLiveChat [Icons: Mail, Help, Close]

Agents | **Responses** | Surveys | Transcripts | Setup

Add a response

Indicate the type, name, and text for the response. Use the "add next" button to continue adding responses. Click "finish" when you are done adding responses. Clicking "cancel" returns you to the response list without adding a response.

Type: Text URL

Name:

Text:

Place in category:

0 response(s) added.

[Cancel] [Finish] [Add Next >]

2.3 Surveys

Create a Survey

1. Click **Add**.
2. Provide a Name for your survey.
3. Click **Finish**.
4. Select survey, Click **Edit**.

EasyLiveChat [Icons: Mail, Help, Close]

Agents | Responses | **Surveys** | Transcripts | Setup

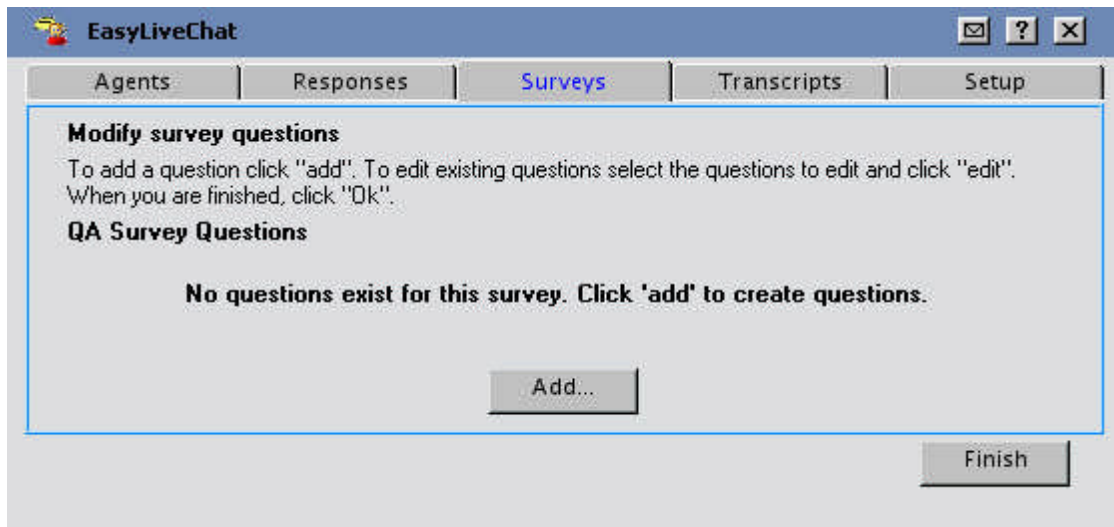
Survey List

Click "add" to create a survey. You can modify a selected survey by using the "edit" button. To rename a survey, use the "rename" button. You can delete one or more surveys using the "delete" button.

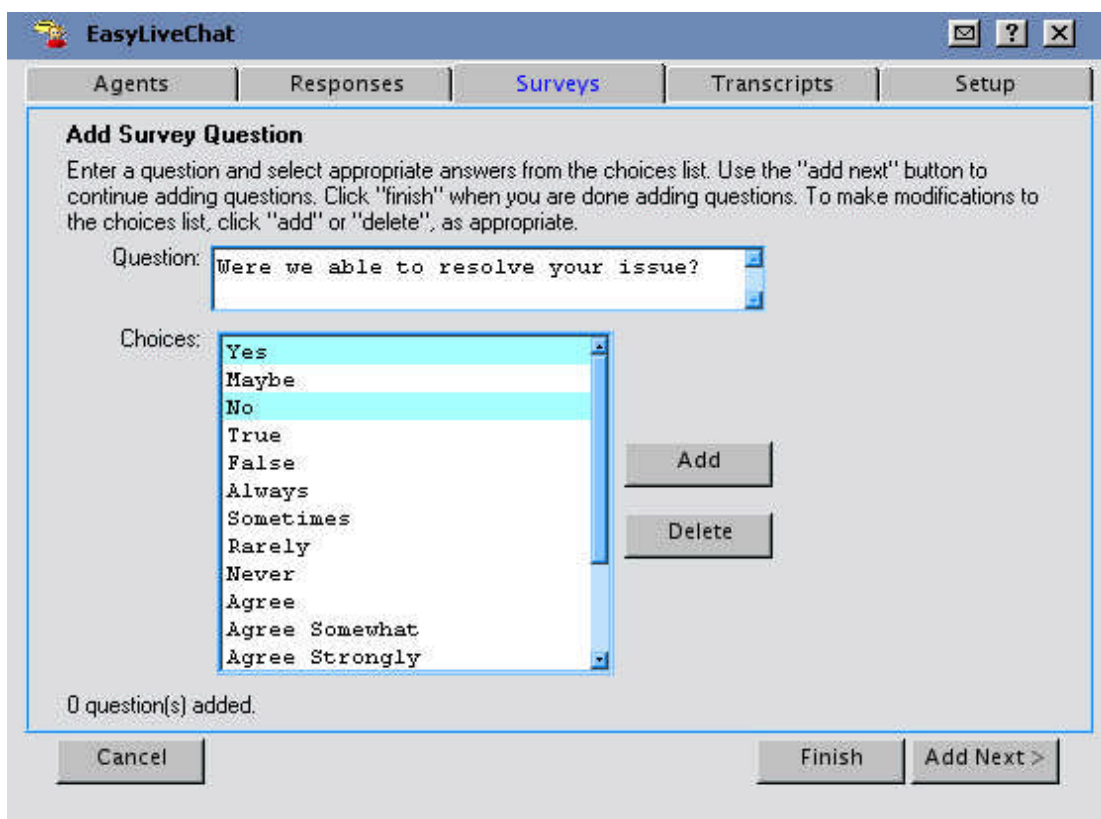
Survey Name	
Customer Service	<input type="button" value="Edit..."/> <input type="button" value="Rename"/> <input type="button" value="Add..."/> <input type="button" value="Delete"/>

[Show Results...]

- Click **Add**, to create a question.



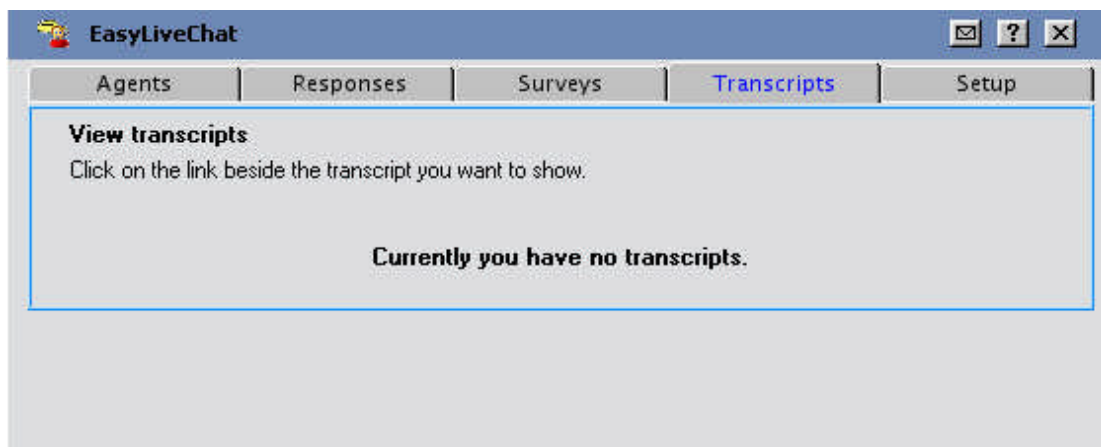
- Type in question.



- Select possible answers by holding down "Ctrl" on your keyboard and clicking the appropriate responses from the Choices list. While holding "Ctrl", all highlighted options will appear as choices.
- Click **Finish**.
- If you wish to add another survey question click **Add Next**.

2.4 Transcripts

Under the Transcripts tab, previous chats are listed by time. Click to review in popup



2.5 Setup

2.5.1 Visitor/Agent Theme

Define the colours used in both the Agent and Client interface by selecting a colour from the available palette for each of the variables.

2.5.2 Logos

Provide a link to be used for the Agent and Client login interface.

- The top link "Logo" defines the image shown to the top left of the screen.
- The "Side bar logo" appears to the right of the client chat interface.

2.5.3 Initial Questions

By default the system requests the username (locked) and issue. If you prefer to have the "issue" question stated in a specific way, or if you would like to request alternate information this is defined here. From the drop down box, select Email or Other in the order they should appear.

2.5.4 Snippets

Click the Agent/Client code Snippets link to bring up a new window containing the code for the VMS owner to include in the code into online support pages or email. The text cannot be edited within the popup window.

EasyLiveChat [Icons: Mail, Help, Close]

Agents | Responses | Surveys | Transcripts | **Setup**

Visitor Theme:

Background: #e0e0fe [Color Picker]

Visitor Text: #000000 [Color Picker]

Agent Text: #000000 [Color Picker]

Border: #818f93 [Color Picker]

Window Text: #000000 [Color Picker]

Header: #50506c [Color Picker]

Agent Theme:

Background: #e0e0fe [Color Picker]

Visitor Text: #000000 [Color Picker]

Agent Text: #000000 [Color Picker]

Border: #818f93 [Color Picker]

Window Text: #000000 [Color Picker]

Header: #50506c [Color Picker]

Foreground: #c1ced1 [Color Picker]

Logo: http:// [Text Box]

Side bar logo: http:// [Text Box]

Chat subject label: [Text Box]

Not in service message: [Text Box]

Support email: [Text Box]

Chat language: English [Dropdown]

Allow chat session transfers between agents.

Clients are initially asked:

Question 1: Name [Dropdown] Please provide your name [Text Box]

Question 2: Issue [Dropdown] Please describe your issue [Text Box]

Question 3: NONE [Dropdown]

Question 4: NONE [Dropdown]

Automatically email transcripts to clients (one of the above questions must be set to 'email' and your support email must be filled in).

Code Snippet

Click on the link below for the source code that should be put into your agent and client support pages.

[Agent/Client Code Snippet](#)

Cancel | OK

<< DOCUMENT END >>