



# EasyLiveChat 1.0 Installation Guide

**Key**



Important note



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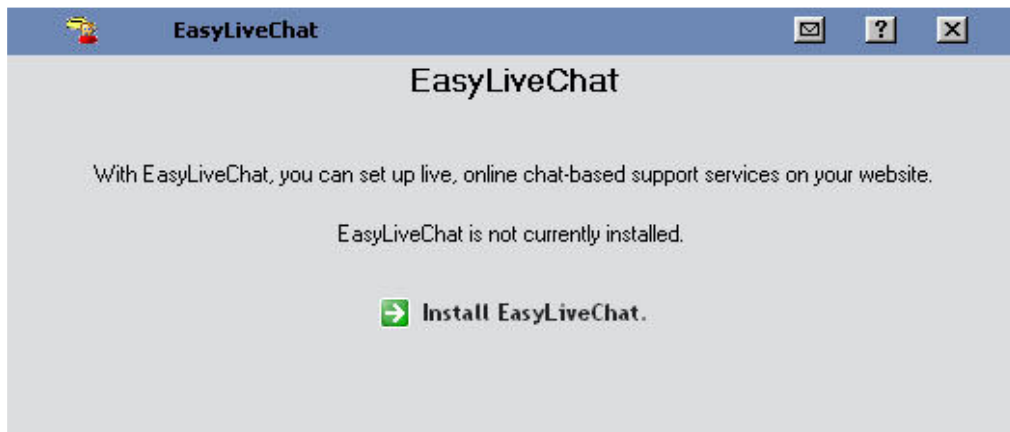
**Please note:** EasyLiveChat 1.0 is supplied with Web Hosting (IBP) and Advanced Web Hosting products only.

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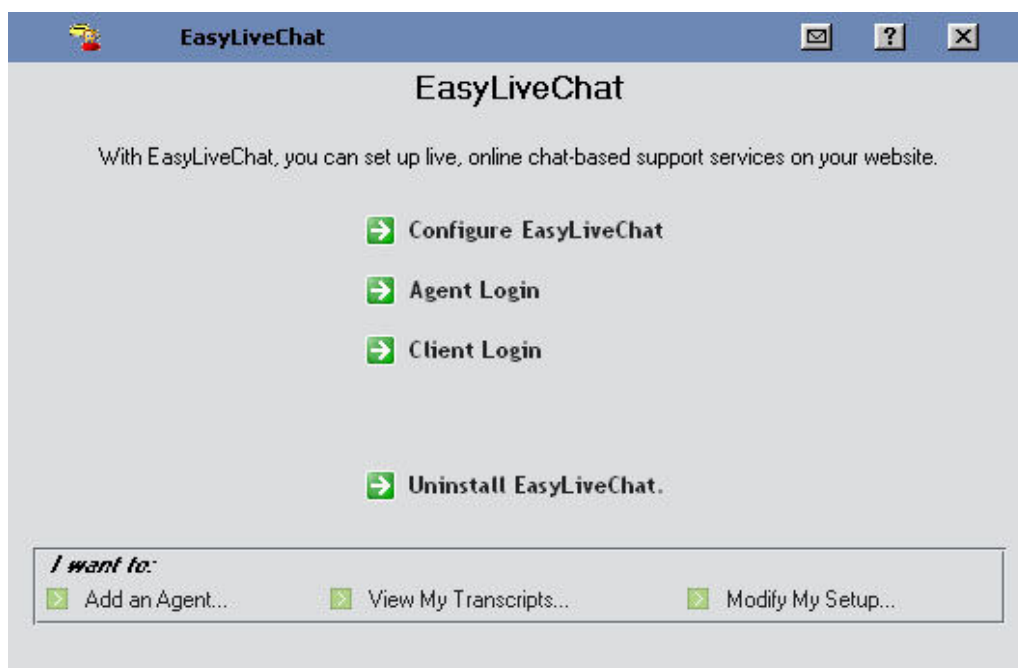


## Install EasyLiveChat

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:
    - a. Configure EasyLiveChat
    - b. Agent Login
    - c. Client Login
    - d. Uninstall EasyLiveChat
    - e. Add an Agent\*
    - f. View my Transcripts\*
    - g. Modify My Setup\*

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

### **There are 5 different Tabs in EasyLiveChat**

1. Agents
2. Responses
3. Survey
4. Transcripts
5. Setup

#### **1) Agents**

1. Type in agent “Name.”
2. Type in agent “Password.”
3. Select from the drop down menu the “Maximum Chats”
4. Select from the drop down menu a survey
5. Enter agent email address
6. Click “Finish.”



**EasyLiveChat** [Email] [Help] [Close]

Agents | Responses | Surveys | Transcripts | Setup

**Add an agent**  
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:

0 Agent(s) added. You can create 1 more agent(s).

Cancel Finish



“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.

**EasyLiveChat** [Email] [Help] [Close]

Agents | Responses | Surveys | Transcripts | Setup

**Agent List**  
To edit or delete agents, select agents from the list and click on the appropriate button below. Click "add" to add one or more agents

|                          | Name         | Password | Max. Chats | Survey | Email           |
|--------------------------|--------------|----------|------------|--------|-----------------|
| <input type="checkbox"/> | MaxwellSmart | password | 4          |        | agent@email.tld |

You can create 0 more agent(s)

Delete Edit...



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



**EasyLiveChat**

Agents Responses Surveys Transcripts Setup

**Add a category**  
Edit the name of the survey. When you are finished, click "finish". To leave the name unchanged, click "cancel".

Category Name:

Location:

Cancel Finish Add Next >

## 2) Responses

### Add/Edit a Category

In the Heading beneath Category

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



**EasyLiveChat** [Icons: Mail, Help, Close]

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

**Response List**  
Click on a category to view associated responses. Use the "add", "edit", or "delete" buttons to modify the category or response list as needed.

**Categories**

|    |    |
|----|----|
| .. | .. |
|----|----|

**Responses**

|  |  |
|--|--|
|  |  |
|--|--|

Add... Edit... Delete Add...

**EasyLiveChat** [Icons: Mail, Help, Close]

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

**Add a category**  
Edit the name of the survey. When you are finished, click "finish". To leave the name unchanged, click "cancel".

Category Name:

Location:

Cancel Finish Add Next >



## Add a Response

In the heading beneath “Responses”

1. Click Add
2. Select type of “Response” (i.e. Text/URL).and fill in appropriate details.
3. Select a Category
4. Click “Finish.”

The screenshot shows the 'EasyLiveChat' application window with the 'Responses' tab selected. The 'Add a response' dialog box is open, containing the following elements:

- Title:** Add a response
- Instructions:** 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:** Radio buttons for 'Text' (selected) and 'URL'.
- Name:** Text input field containing 'Contact Us'.
- Text:** Text area containing 'We are available 24 hours a day, 7 days a week for additional assistance, and invite you to contact us if you have any additional concerns.'
- Place in category:** Dropdown menu showing '.. /'.
- Status:** 0 response(s) added.
- Buttons:** 'Cancel', 'Finish', and 'Add Next >'.

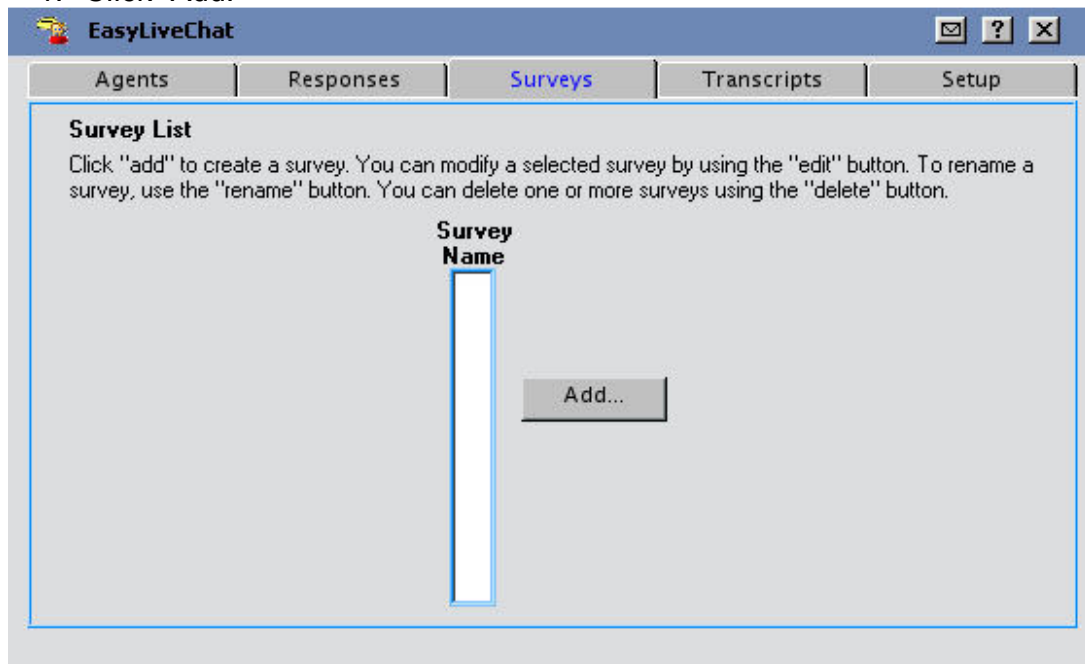




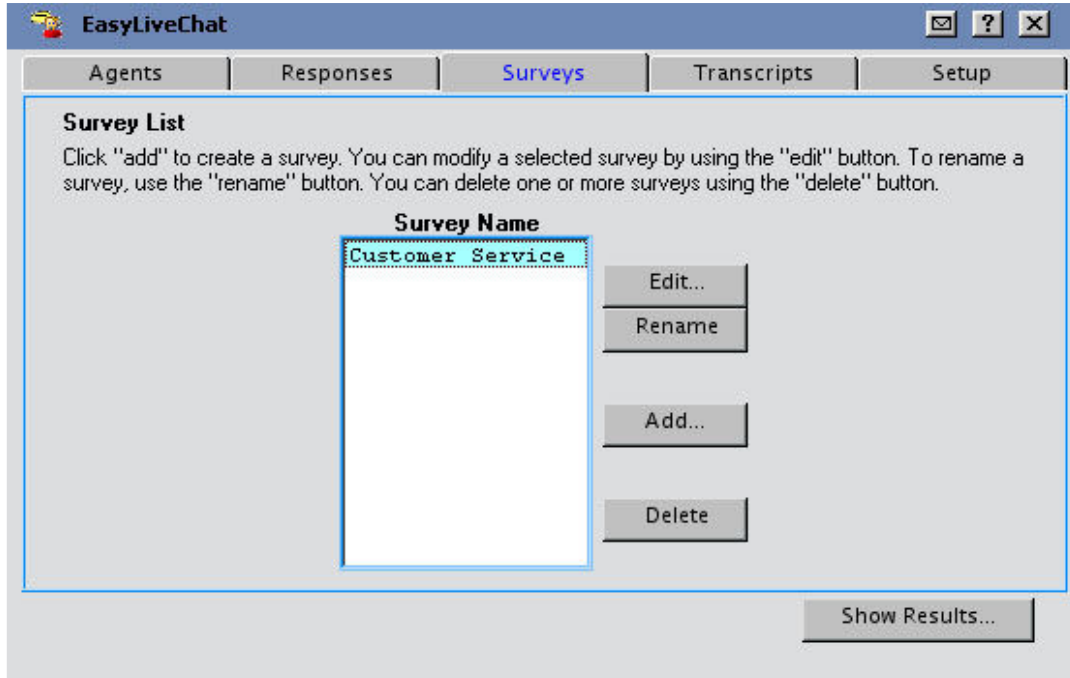
### 3) Surveys

#### Create a Survey

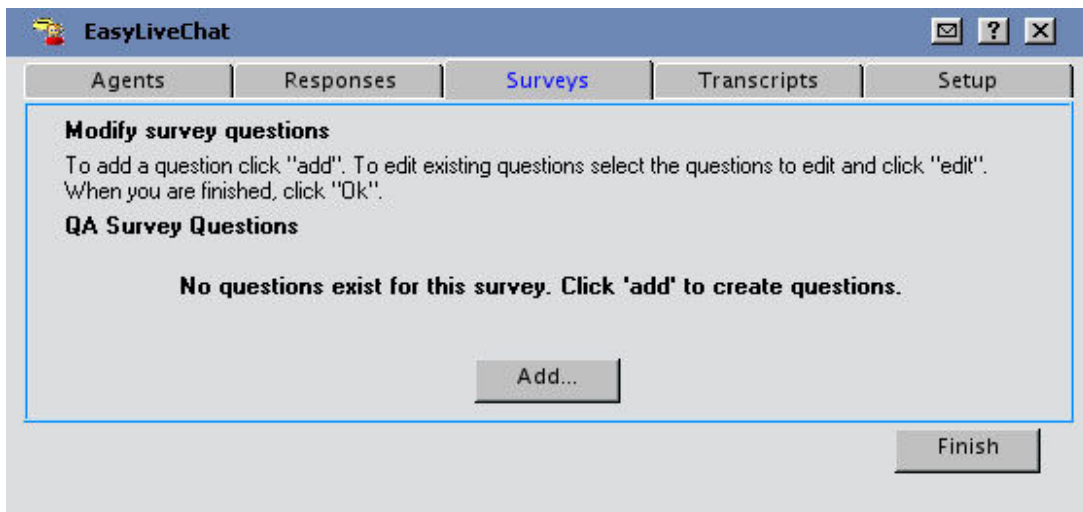
1. Click "Add."



2. Provide a Name for your survey.
3. Click "Finish."
4. Select survey, Click "Edit."



5. Click “Add,” to create a question.





6. Type in question.

The screenshot shows the 'EasyLiveChat' application window with the 'Surveys' tab selected. The 'Add Survey Question' dialog box is open, containing the following elements:

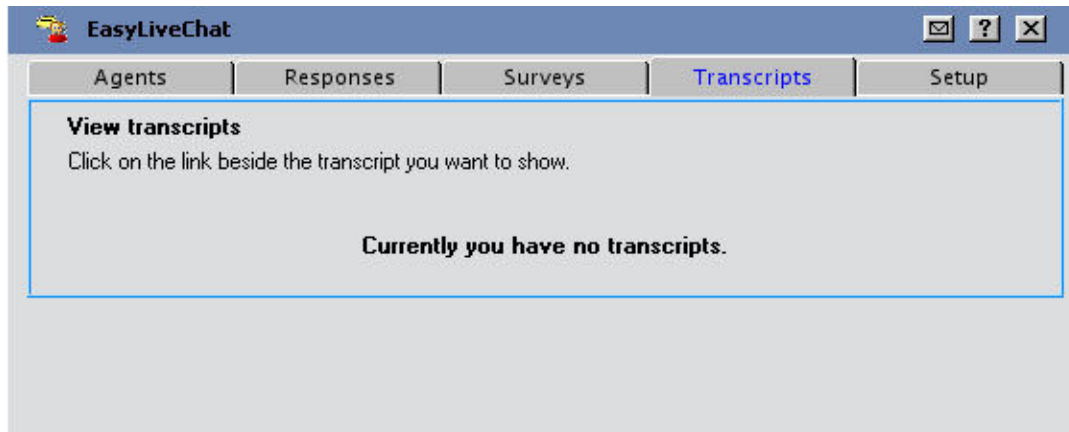
- Question:** A text input field containing the text "Were we able to resolve your issue?".
- Choices:** A list box containing the following options: Yes, Maybe, No, True, False, Always, Sometimes, Rarely, Never, Agree, Agree Somewhat, and Agree Strongly. The 'Yes' option is currently selected.
- Buttons:** 'Add' and 'Delete' buttons are located to the right of the choices list.
- Status:** A message at the bottom left of the dialog reads "0 question(s) added."
- Footer Buttons:** 'Cancel', 'Finish', and 'Add Next >' buttons are located at the bottom of the dialog.

7. 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.
8. Click "Finish."
  - a. If you wish to add another survey question click "Add Next."



#### 4) Transcripts

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



#### 5) Setup

##### Visitor/Agent Theme:

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

##### 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.

##### 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.



## 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.

The screenshot shows the 'EasyLiveChat' Setup window with the following configuration options:

- Visitor Theme:**
  - Background: #e0e0fe
  - Visitor Text: #000000
  - Agent Text: #000000
  - Border: #818F93
  - Window Text: #000000
  - Header: #50506C
- Agent Theme:**
  - Background: #e0e0fe
  - Visitor Text: #000000
  - Agent Text: #000000
  - Border: #818F93
  - Window Text: #000000
  - Header: #50506C
  - Foreground: #c1ced1
- Logo:** http:// [text box]
- Side bar logo:** http:// [text box]
- Chat subject label:** [text box]
- Not in service message:** [text area]
- Support email:** [text box]
- Chat language:** English
- Allow chat session transfers between agents.
- Clients are initially asked:**
  - Question 1: Name | Please provide your name
  - Question 2: Issue | Please describe your issue
  - Question 3: NONE | [text box]
  - Question 4: NONE | [text box]
- 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

Buttons: Cancel, OK