

LiveEngage User Guide for Campaign Managers

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LIVEPERSON

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1 Introduction

LiveEngage is a comprehensive solution that enables consumers to interact with brands from their channel of choice, and brands to enhance existing services with messaging.

Our enterprise-grade, secure, cloud platform enables brands to achieve the following:

- Upgrade from outdated voice and email interaction to mobile and web messaging.
- Transform agents into Customer Care Professionals (CCPs) that grow customer lifetime value and retention.
- Manage and track cost savings, ROI and Customer Satisfaction using robust analytical tools and reporting.

1.1 Move from Voice to Messaging

In-App Mobile Messaging: LiveEngage provides a mobile software development kit (SDK) that can be incorporated into a brand's mobile app, providing advanced messaging capabilities to consumers. In-app messaging follows familiar conventions, such as push notifications, read notices, and UI, and, in addition, offers features that are necessary for brand to consumer messaging, for example, communicate expected response time.

Text Messaging: Consumers can begin a conversation with a brand by simply sending a text (SMS) message, driving consumers to digital interaction from anything from a mailed statement to a physical advertisement. The brand's CCPs can respond through LiveEngage and conduct an ongoing service conversation using text messaging.

IVR Deflection: LiveEngage integration paves the way for brands to deflect phone calls from callers already in the IVR, by offering an option to drop out of the phone queue and initiate a conversation via mobile messaging. IVR Deflection can be configured at any stage of the IVR tree, and sends a text message to the consumer that launches a mobile conversation.

Live Chat - web and mobile web: LiveEngage Live Chat offers an instant connection between brands and consumers. The Live Chat option is automatically responsive for desktop (embedded window) and mobile web. Brands can add Live Chat anywhere, including web and mobile websites, SMS messages, emails, social media, and more. The LiveEngage Live Chat window meets the stringent industry accessibility standards.

Reduce Voice with Self Service: The LiveEngage solution also offers self-service banners that can be customized to fit into any consumer online journey. Brands can use self-service banners to provide general alerts, answer common queries, and make digital offers.

1.2 Shift Agents to Customer Care Professionals

LiveEngage equips Customer Care Professionals (CCPs) with the best tools possible to create meaningful connections with consumers. The workspace is designed to drive efficiency, and at the same time, is conducive to personal conversations and longer term connections.

The CCP Workspace: LiveEngage's workspace is designed to promote efficiency among CCPs. Features include quick view of previous conversations, predefined content, hotkeys, color coding, notifications, and more. The workspace is compatible with all modern browsers and requires zero installation or set up. A mobile version is also available to download through the App Store or Google Play.

Continuous connections: CCPs can create ongoing, continuous relationships with consumers through the connections list. All mobile messaging conversations create a 'connection' for a CCP, which is viewable, filterable, and sortable. CCPs can continue to conduct conversations with the same consumers to enhance the connections with them. In addition, CCPs can proactively send messages to consumers in their connection list.

Real-time performance data: Directly embedded into the CCP workspace is a KPI bar and pull-down dashboard. These display the real-time metrics which are most relevant for them, including CSAT and completion rates.

Meaningful Connection Score (MCS) Indicator: To empower CCPs to quickly identify conversations that are at risk of becoming negative, a real-time MCS indicator displays directly within the conversation. MCS is determined through a powerful text-analytics system based on advanced natural language processing techniques, customized specifically to live chat conversations.

Beyond text, CoBrowse: CCPs can open a secure CoBrowse session and help consumers navigate a lengthy page or fill out a complex form. This ensures profound, personal contact between CCPs and consumers - while maintaining the highest level of security and privacy.

Integrations that provide detailed information: LiveEngage displays information about consumers, shown side-by-side with the conversation. To provide more detailed information to CCPs, and allow them to have more meaningful conversations, the following integrations are available:

- **Engagement Attributes:** Brands can send information from the browser or via code to LiveEngage, including the customer's name, account information, website actions, shopping cart content and value, error messages, and more.
- **CRM Integration or integration from any other web-based application:** This pulls in third-party data and interfaces directly into the workspace.

Note: An out-of-the-box salesforce integration is available.

1.3 Connection Center Operations and Reporting

Prominent, easy, yet robust ROI and KPI reporting tools provide our brands with full analytical capabilities. Managers have the administrative and operational tools to incorporate LiveEngage into any Connection Center.

Robust reporting and analytics: Contextual and user-based analytics appears for LiveEngage users directly within their workspace and in real-time. Additional dashboards and BI reports are available for detailed analytics.

- Operational reporting: Real-time and BI data for operational data, including queue health and agent performance.
- Conversion and business reporting: Dashboards and analytics on sales and service conversions, and the performance of LiveEngage engagement campaigns.
- Hot Topics: Embedded, powerful analytics dashboard provides immediate insight into what draws consumers toward or away from a brand. Provides a snapshot of trends in conversations, based on natural language analytics, and highlights positive or negative sentiment per trend.
- Export in real time and over time: Export LiveEngage operational data using the real-time operational API and Engagement History API, and integrate it into any applications, dashboards, or databases.

Management Tools: Agent Managers have built-in management tools, including: Real-time view of conversations; join conversations; send private messages to CCPs to provide directive; view and search of history, and more. LiveEngage supports user management and reporting for brands that have branches and hierarchies, allowing managers and supervisors to focus only on the groups they manage.

APIs and integrations: By using LiveEngage APIs, brands can customize applications and add features that extend the reach of the LiveEngage solution. LivePerson APIs provide access to LiveEngage account data, configuration, and real-time interaction services.

1.4 Enterprise Grade Solution

- Proven and certified security
- Comprehensive set of security tools and features.
- Meet the most stringent financial industry regulations.
- 300+ customer due diligence processes and assessments a year.

Scalable infrastructure ready to support any traffic levels

- 27 million engagements per month.
- 2 million monitored visits per month.
- High availability (99.98% uptime).

Professional service and industry expertise

- 24/7 Support.
- Global language support: LiveEngage UI is available in 12 languages and the LiveEngage consumer window UI is available in 40 languages/dialects.

2 Getting Started

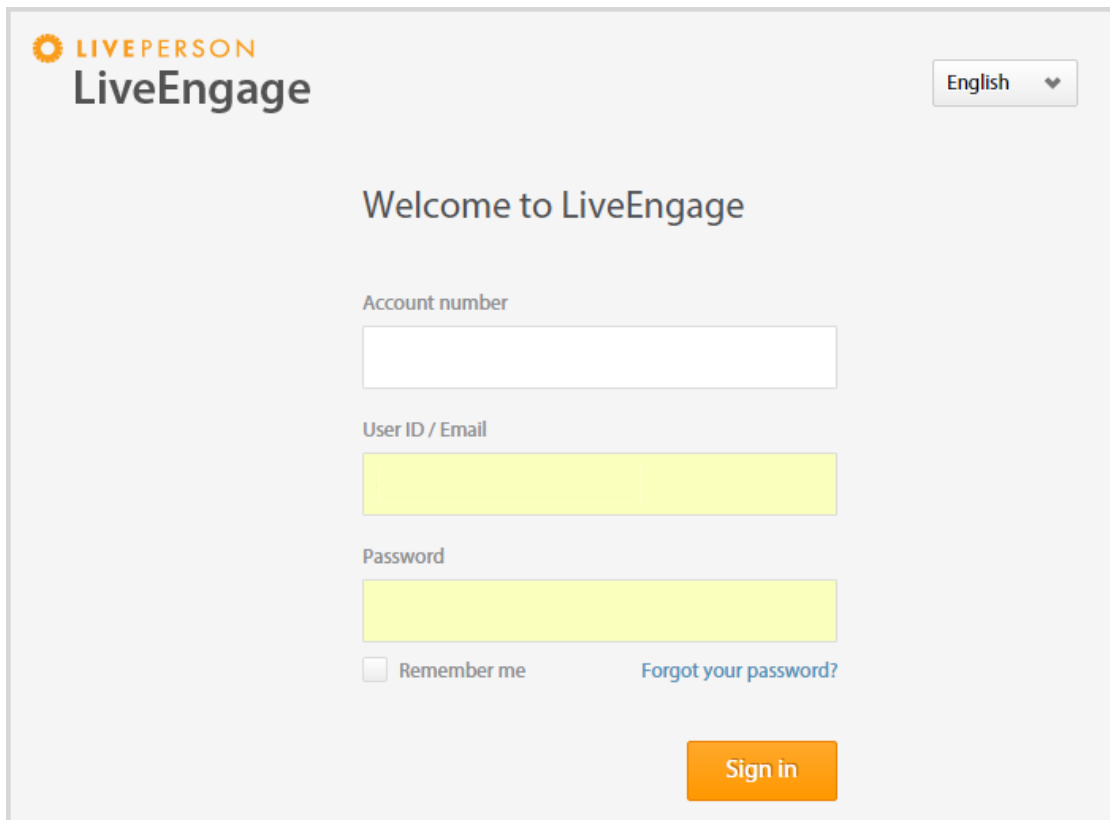
This chapter provides a quick start guide for LiveEngage. It describes the basic procedures that you need to know in order to get started.

2.1 Accessing LiveEngage

As LiveEngage is a completely web-based solution, it can be accessed from anywhere, and at any time. For information about system requirements and languages supported in LiveEngage, download the [System Requirements PDF](#).

To access LiveEngage:

1. Type the following URL into your internet browser:
<https://authentication.liveperson.net/login.html>. The login page is displayed.



2. Enter your account number, User ID or email, and your password.

*Note: If you are using a personal computer, you can select the **Remember me** option. Do not select this option if you are using a public computer.*

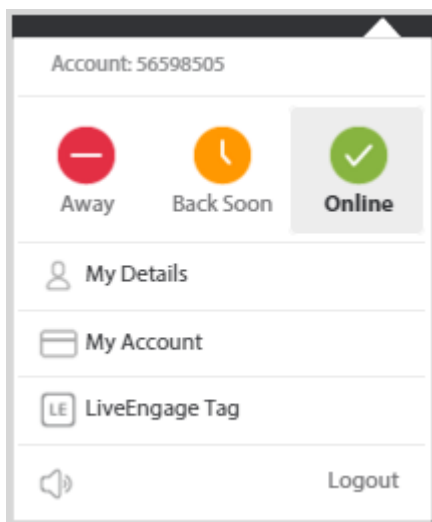
3. Click **Sign in**.

2.2 Connecting your Website

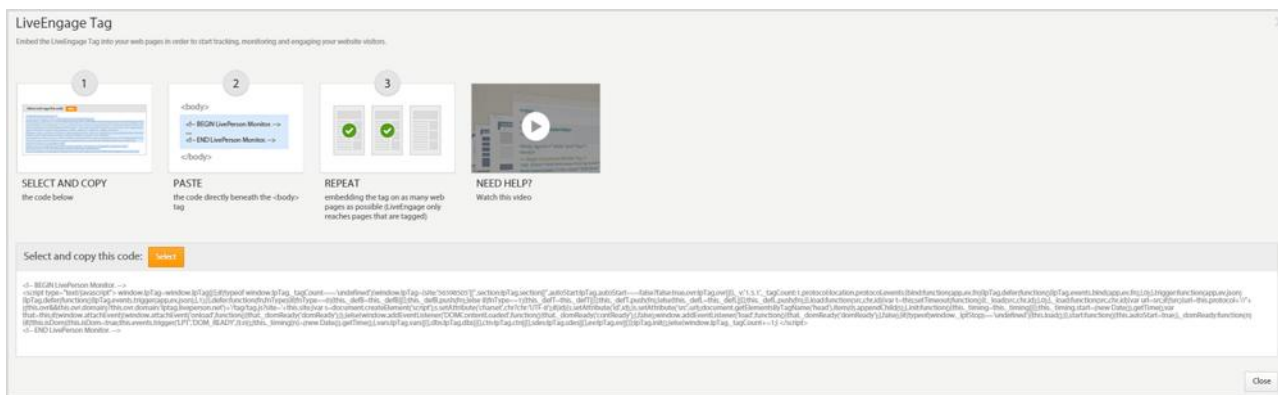
The LiveEngage Tag consists of a small, lightweight piece of code that enables you to embed innovative LivePerson products and applications. In order to connect your website to LiveEngage, the LiveEngage Tag must be embedded in each page of your website.

To connect your website:

1. Log into LiveEngage with your Administrator credentials.
2. On the top right-hand corner of the screen, click your user ID. The drop-down menu is displayed.



3. Select **LiveEngage Tag**. The LiveEngage Tag page is displayed.



4. Follow the instructions to copy and paste the tag into the <head> element of each of the website pages where you want to engage with consumers.

Notes:

- i. The tag which you copy onto your webpages is less than 1 kilobyte in size. When downloaded, the core tag is approximately 10 kilobytes zipped. Using additional features may increase the size of the tag. For further information, contact LivePerson.
- ii. For further information on deploying the LiveEngage Tag, see [The LiveEngage Tag](#).

2.3 The Visitors List

The Web Visitors list displays all visitors currently on your website, along with information about each visitor's geolocation, browser details, and IP address. The visitor's current location on your website is also displayed.

Web Visitors
Your workspace for live connections with consumers through web and mobile sites. View all current conversations along with real time visitors.

		VISITOR NAME	COUNTRY	SKILL	AGENT NAME	CURRENT PAGE	BROWSER	IP	VISIT START
		Visitor		N/A	Danny dean	Homepage (1)		207.46.244.188	9:34 pm
		Visitor		Support	Me	Homepage (1)		63.123.44.190	9:24 pm
		Visitor		Sales	Gulli	Homepage (10)		63.123.44.190	9:31 pm
		John Smith		Sales	Me	Chat page (15)		207.46.244.188	9:16 pm
		Visitor		Chat	Me	Chat page (7)		217.19.79.9	9:15 pm
		Visitor		Sales		Store (4)		88.219.86.183	9:15 pm
		Hans christian andersen		N/A		Book store (8)		63.123.44.190	9:05 pm
		Ben		Product holl...		Product ho...(6)		88.219.86.183	9:15 pm

Page 1 of 12

0 WAITING 0 INACTIVE

Figure 1: Web Visitors list

Sort visitors

You can sort the visitors according to any of the following parameters:

- Meaningful Connection Score (see 6.3)
- Country
- Skill
- Agent name
- Current page on your website that the visitors are browsing

To sort the visitors, simply click on the relevant parameter header.

View more detailed information

You can view more detailed information about your visitors, including the following:

- **Visit info:** Which campaign the visitor is currently exposed to, along with the campaign's main parameters (goal, target audience, and visitor behavior). You can also see more detailed information about the visit, including city and country, organization, operating system, browser, and more.
- **Page navigation:** What page the visitor is currently browsing, as well as the pages previously visited.

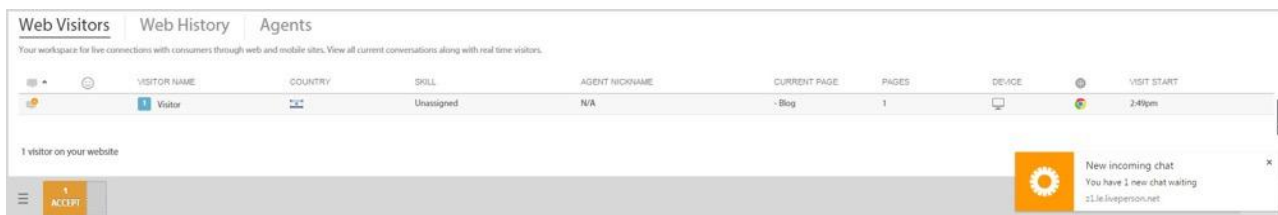
To view more detailed information about a visitor, simply click on the visitor's name.

Meaningful Connection Score (MCS)

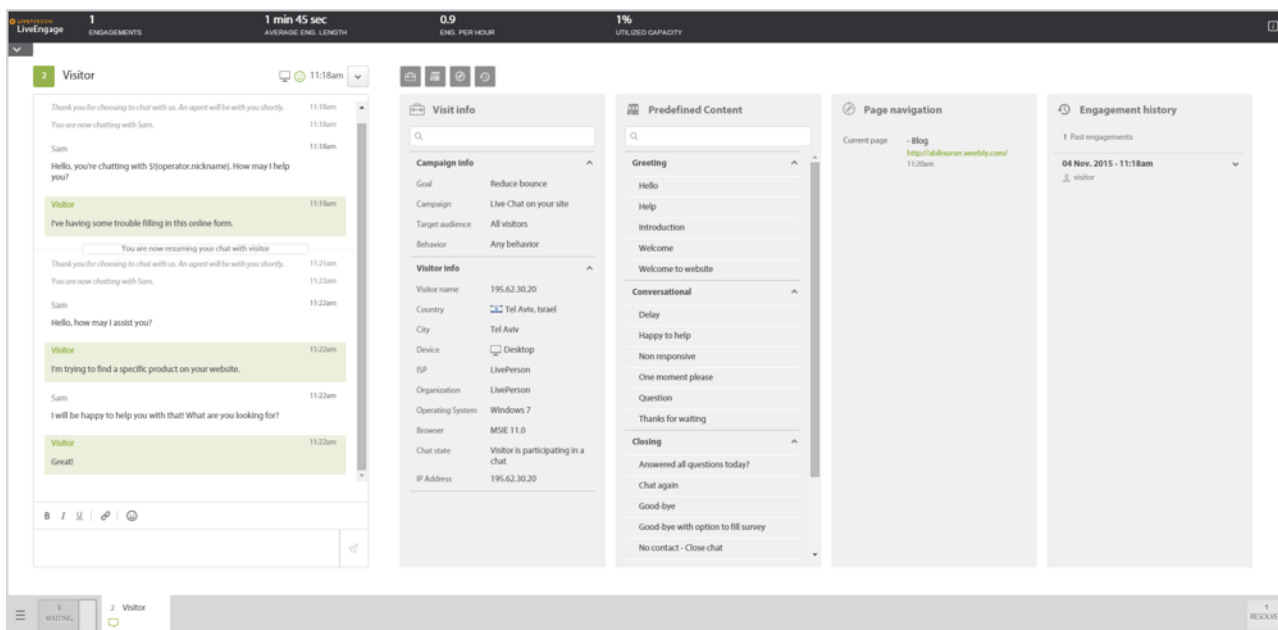
You are provided with a Meaningful Connection Score (MCS). This relates to the quality of the current connection between the brand and the visitor. For more information on the MCS, see 6.3.


2.4 Handling chats in the Agent Workspace

Once a visitor initiates a conversation from your website by clicking on the chat button and completing any necessary pre-chat surveys, a notification is displayed on the relevant agent's desktop.





Accept the chat by clicking **ACCEPT** on the bottom left-hand corner of the screen. The in-chat screen is then displayed.



To send a message, enter text in the lower text entry area, and click the Send () button, or press Enter. The sent text is displayed in the chat display area, along with replies and text sent by the visitor.

If you do not send a message to the consumer for some time, a default message is sent, apologizing for the delay.

You can always return to the visitor list while chatting with a consumer. Simply click the menu button () in the bottom left-hand corner of the screen.

You can terminate a conversation at any time by selecting End engagement from the dropdown menu next to the visitor name (). The visitor can also terminate the chat session by closing the chat window.

2.5 Agent Widgets and Tools

The Agent Workspace includes several widgets to help agents manage their conversations:

- **Visit info widget:** Indicates who the visitor is, and how they arrived at the website.
- **Predefined content widget:** Offers a library of ready-made responses which help streamline the conversation and improve response times. For more information on predefined content, see 2.5.52.5.5.
- **Page navigation widget:** Allows agents to offer assistance to consumers according to their journey on the website.
- **Agent survey widget:** Allows agents to provide Agent Managers with input about the conversation and its outcome.
- **Engagement History widget:** Allows agents to read transcripts from previous chats with the visitor and provide better service by understanding their chat history.

Agents also have access to the following tools during their conversations with consumers:

- Copy as plain text
- Private message
- Transfer
- End engagement
- Predefined Content

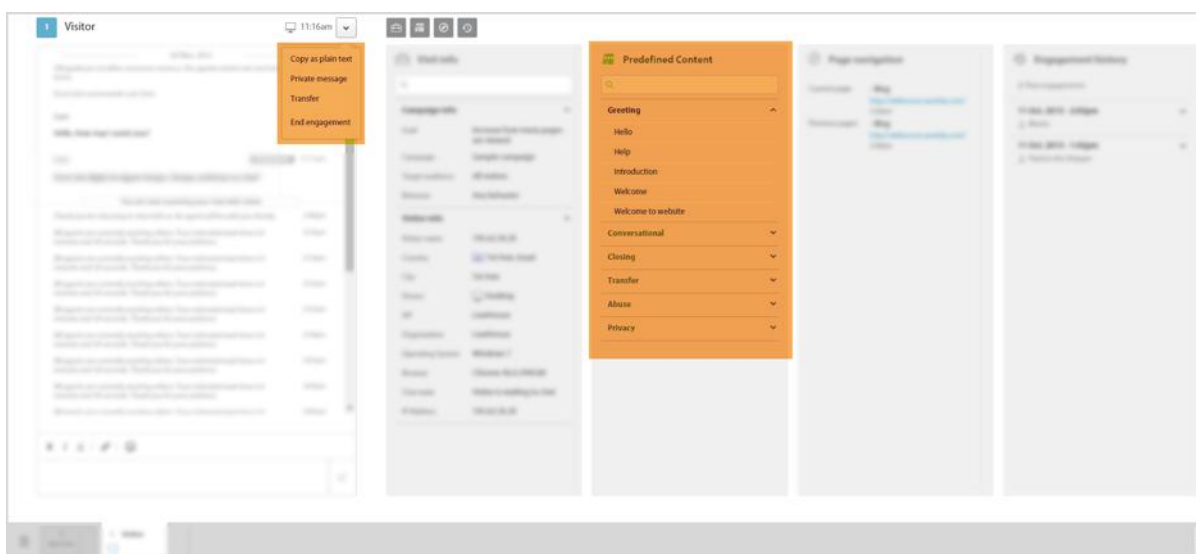


Figure 2: Agent tools

2.5.1 Copy as plain text

Agents can copy the full chat conversation in plain text and paste it into a different location, for example, into an email or document.

2.5.2 Private message

Agents can send a private message to a different agent whilst they are in a conversation with a visitor, for example, to ask a question or request assistance.

2.5.3 Transfer

Agents can transfer the chat session to another agent or skill group, for example, if another agent has greater knowledge about the questions being asked by the visitor. You can select which agent to transfer the chat to and send a short message (visible only to the agent) to communicate the chat details. If the agent refuses the chat, the chat is returned to the original agent.

2.5.4 End engagement

The conversation is ended and the visitor receives a message in the embedded engagement window indicating that the chat session has been terminated by the agent. The state of the visitor in the Visitor List changes to **Chat ended**.

2.5.5 Predefined Content

At any given time in your shift as an agent, you are expected to handle multiple chats in a competent and efficient manner. By using predefined content in your chats, you can relieve some of the pressure on yourself, achieve your goals, and maintain your high standards. The use of predefined content saves time, and can ensure consistent, error-free responses and a professional “tone of voice”.

You can access the predefined phrases while you are chatting and, rather than retyping repeatedly, you can select the relevant, ready-made response. The predefined responses are organized into categories, such as Greeting, Conversational, Closing, and additional categories that your managers create based on your business needs. Managers can also assign Hotkeys (shortcuts) to the most useful predefined responses, and you can save time and energy by using them.

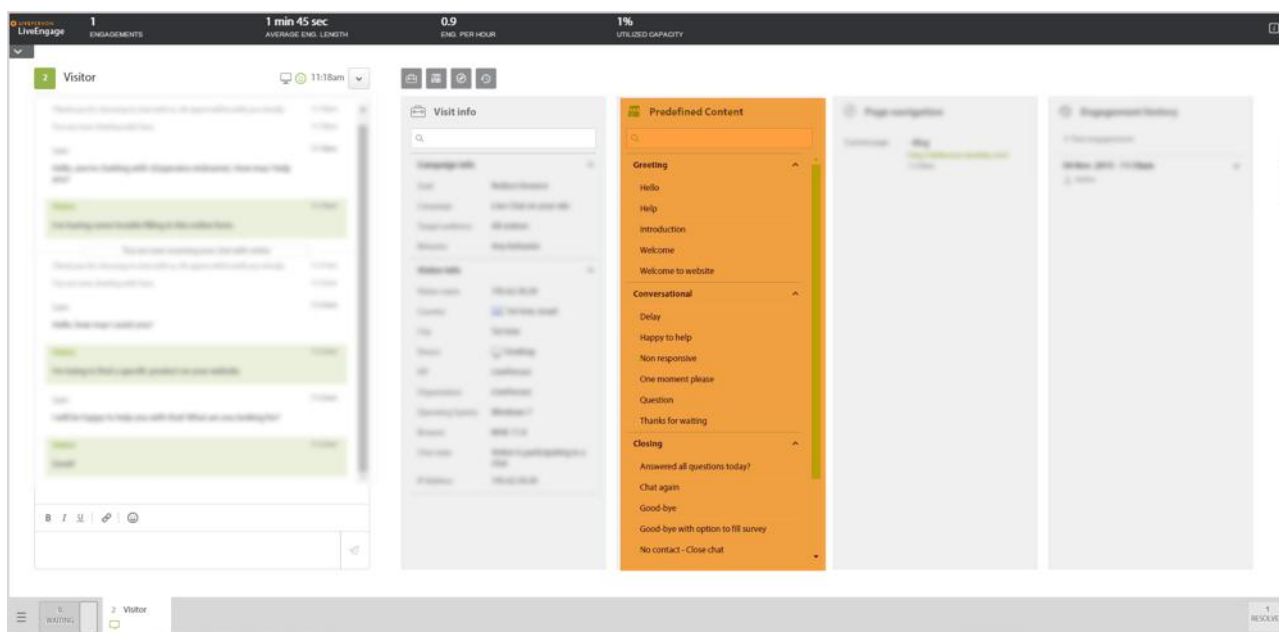


Figure 3: Predefined Content

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While you are chatting, you can quickly navigate through the categories and select the relevant response. Here are some examples of categorized predefined responses:

- Closing: Thank you for visiting. Please contact us any time.
- Conversational: Thank you for waiting.
- Greeting: Hello, how may I assist you?

2.5.6 Hot Keys

Hot keys help agents manage multiple, simultaneous tasks, by providing shortcuts to easily move between tasks, such as opening the Visitor List, toggling your status, and transferring chats to other agents.

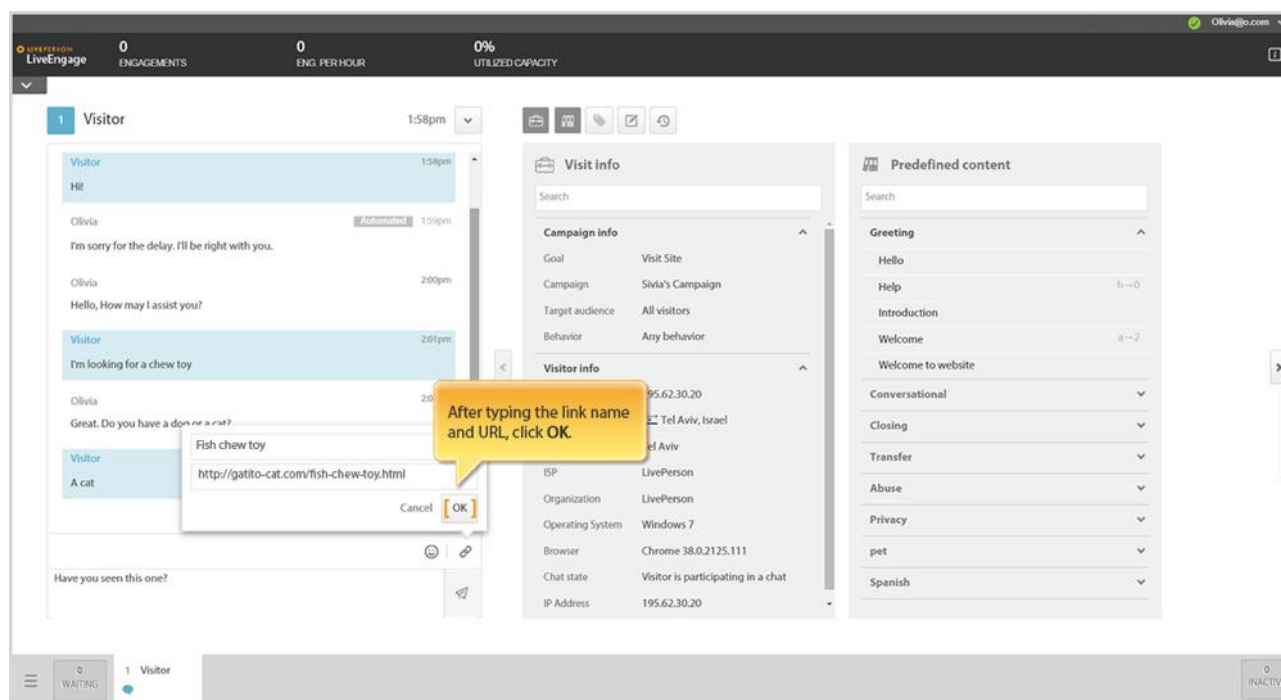
There are seven hot keys available in the Agent Workspace. Open the hot keys menu by holding down the control and tilde keys (CTRL + ~). Select an action by pressing the applicable letter:

- LOGOUT (L): to logout of the agent workspace
- ACCEPT ENGAGEMENT (A): to accept a new incoming chat
- VISITOR LIST (V): to access the list of your current visitors
- STATUS (S): to toggle your status between Online, Back Soon and Away
- END ENGAGEMENT (X): to end the current chat
- INACTIVE LIST (I): to open the inactive chats list
- TRANSFER ENGAGEMENT (T): to transfer the chat to another agent
- RESPOND TO NEXT (N): navigate to the visitor who has been waiting the longest for a response from the agent

Note: The END ENGAGEMENT and TRANSFER ENGAGEMENT hot keys are available only when you are chatting with a visitor.

2.5.7 Send a link

Agents can send a direct link to a page on their website. Create the link by entering a link name and the relevant URL.



2.5.8 CoBrowse

CoBrowse enables agents and consumers to access and navigate webpages collaboratively. This ensures that complex online tasks and processes can be completed quickly and efficiently. With CoBrowse, chat interactions between agents and consumers are enhanced by a real-time visual layer. This increases consumer engagement by creating a higher degree of co-presence of the CCP. No plugins or downloads are required, ensuring that agents and consumers are connected in an instant.

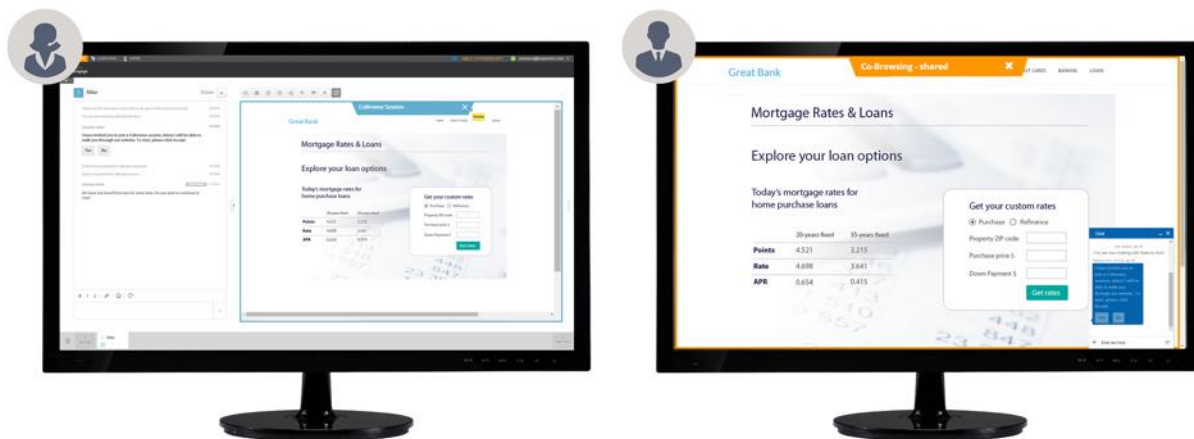


Figure 4: The CoBrowse experience for CCPs (left) and consumers (right)

With CoBrowse, agents and visitors can view each other's virtual mouse cursors, and simply double-clicking on an element or piece of text in the webpage creates an animation effect.

- Double click on an element to display a yellow circle around the cursor.



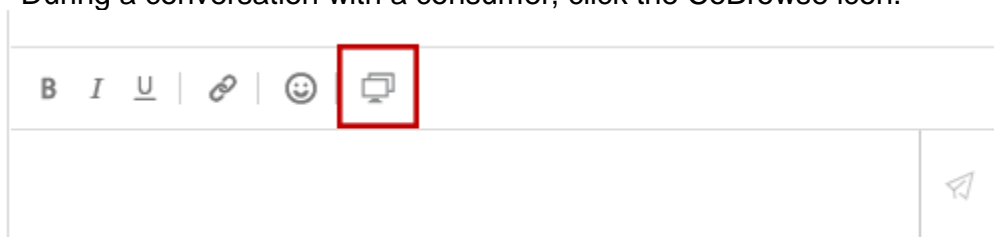
- Press Ctrl + click the left mouse button to animate the element with a wiggle effect.

Use cases for CoBrowse:

- Offering a concierge service
- Walking visitors through a process
- Assisting a visitor in filling out a form
- Helping visitors to troubleshoot

To initiate a CoBrowse session:

1. During a conversation with a consumer, click the CoBrowse icon.



2. Choose the session type:
 - CoBrowse - View Only enables you to view the visitor's screen only.
 - CoBrowse - Shared gives you full control over the current browser tab.

The consumer receives a notification asking them to accept the CoBrowse session.

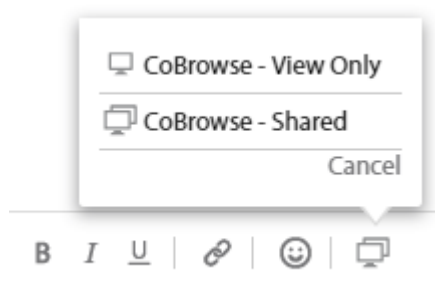


Figure 5: Choosing the session type

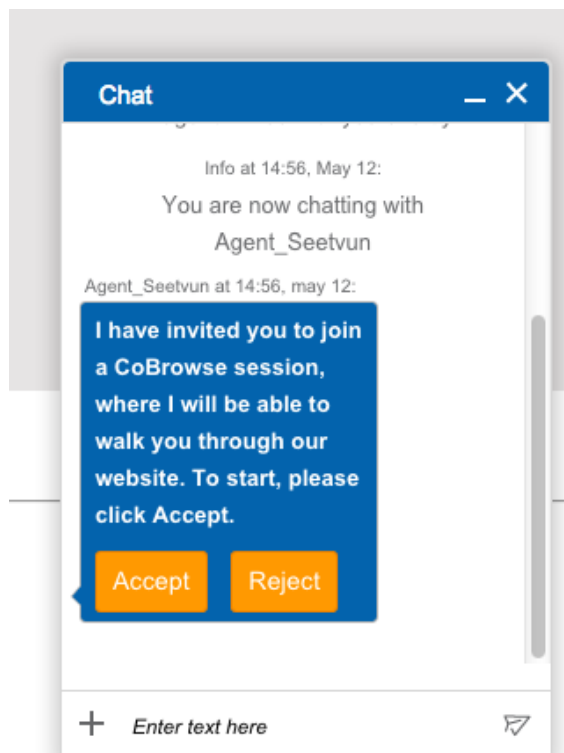
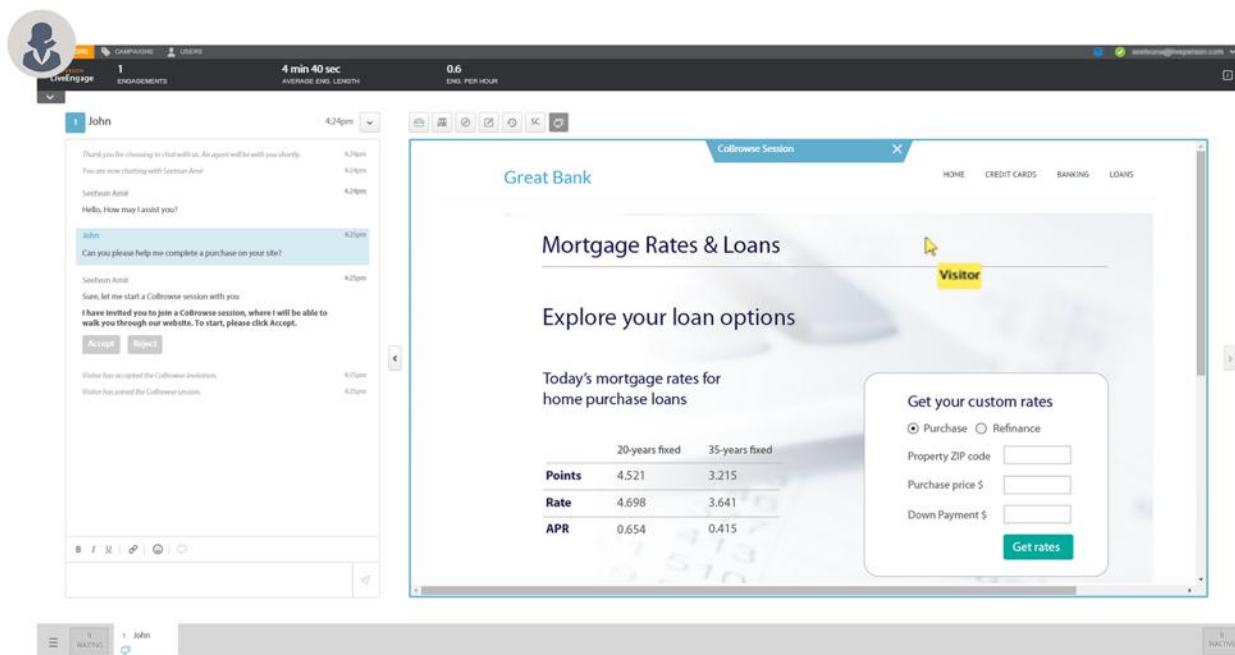


Figure 6: Consumer notification

LIVEENGAGE USER GUIDE FOR CAMPAIGN MANAGERS

3. Once the consumer accepts, the CoBrowse session opens on the agent side and both cursors are displayed and labeled, as shown below.



4. On the visitor side, when the CoBrowse session begins, an orange frame is displayed around the browser tab, indicating an active session. While using CoBrowse, credit card and password fields are automatically masked.

Note: The visitor can close the session at any time by clicking the X at the top of the orange frame.

3 Managing your LiveEngage Account

This chapter provides information about configuring and managing your LiveEngage account. All configurations can be done directly in the LiveEngage user interface.

3.1 Viewing your account

Administrators and Campaign Managers can view account information, including billing information.

To view your account information:

On the LiveEngage home page, click your user ID, and then select **My Account**. Your account window is displayed.

The account window is divided into four sections for easy navigation:

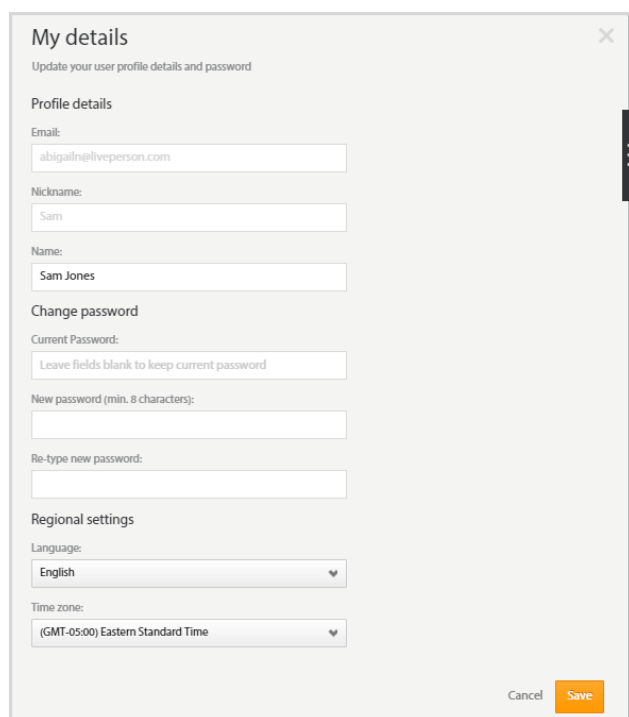
- **Account Owner:** Displays your personal details and email address and notifications will be sent to this address.
- **My Plan:** Displays the number of monthly engagements included in the plan, and the price per month (and the frequency of payment; monthly, quarterly or annually). You can also see what percentage of your allotted monthly engagements have already been used, and tips on how to make the most of your plan.
- **Payment Details:** Displays your default credit card information and billing address.
- **Recent Invoices:** Displays your recent invoices in downloadable format with a summary of billing date, amount, your balance and the account status.

3.2 Changing your name and password

You can change your user profile details, including your name and password.

To change your name and password:

1. On the top right-hand corner of the screen, click your user ID, and then select **My Details**. The My Details screen is displayed.



My details ✕

Update your user profile details and password

Profile details

Email:

Nickname:

Name:

Change password

Current Password:

New password (min. 8 characters):

Re-type new password:

Regional settings

Language:

Time zone:

Cancel Save

Figure 7: My details

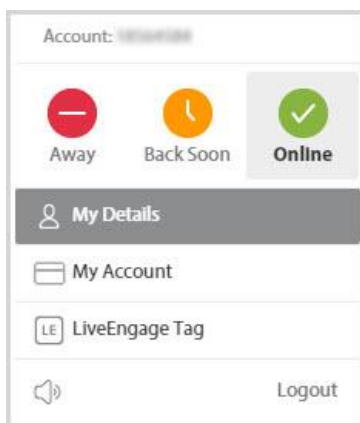
2. Enter a new name and password.
3. Click **Save**. Your name and password are now updated.

3.3 Setting your shift status

You can change your status according to your availability, by choosing between **Away**, **Back Soon**, and **Online**. If your status is set to **Away** or **Back Soon**, you will not receive any chats. When you are available to start accepting chats, change your status to **Online**.

To change your shift status:

1. On the LiveEngage home page, click your username. The status menu is displayed.



2. Select Online, Back Soon, or Away.

Note: The default agent status upon login is Online.

3.4 Setting your LiveEngage regional settings

You can override the account setting for the UI language and time zone and set it to match the language of your choice (out of the available LiveEngage languages), as well as set the time zone.

LiveEngage can be accessed in the following 12 languages: English, Simplified Chinese, Danish, Finnish, German, French, Italian, Japanese, Korean, Portuguese, Spanish, and Turkish.

To set your LiveEngage regional settings:

1. On the main LiveEngage screen, click your username, and then select **My Details**. The My Details screen is displayed (see Figure 7: My details).
2. Select the required language and time zone.
3. Click **Save**. Your regional settings are now updated.

4 Campaigns

Campaigns are essential for working with LiveEngage. They serve as a container in which several aspects of your online engagement efforts are included. Campaigns allow you to configure several key elements, such as targeting a specific audience. They also allow you to decide where to put your engagements on your website, and to customize how your engagements appear. Campaigns are focused on business goals, which help you measure the success and progress of your campaigns.

The following items are included in campaigns:

- What you want to achieve. (Goal)
- The visitors you specifically want to target. (Target audience)
- How you want to interact with your visitors. (Engagements)
- The optimum place(s) on your website where you want to interact with visitors. (Location)
- The browsing behavior of visitors which is of interest to you. (Visitor behavior)

This chapter lays out the step-by-step process of creating a campaign. Campaigns can be created by Administrators and/or Campaign Managers.

4.1 Adding a campaign

Your LiveEngage account comes with a default out-of-the-box campaign.

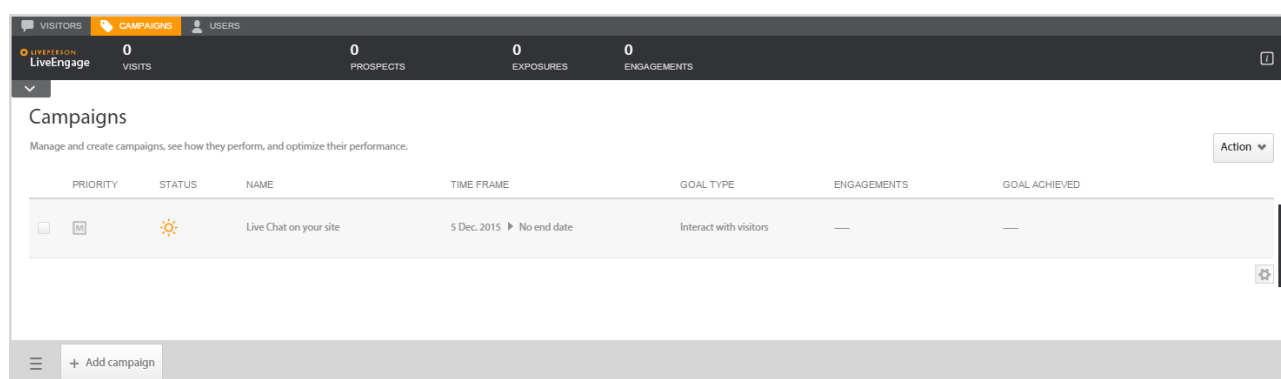


Figure 8: Default campaign

This campaign automatically adds a chat button to your site. Use this campaign as a start, and customize your engagement offering any time through the campaign. Alternatively, you can add a new campaign.

To add a campaign:

1. On the LiveEngage home page, click **Campaigns**. The list of campaigns is displayed.
2. At the bottom of the screen, click **+ Add Campaign**. The Add Campaign page is displayed.

The screenshot shows the 'Campaign 1' setup interface. At the top, there's a header with 'Campaign 1' and a '+ Add description' link. To the right are 'Action' and 'Publish' buttons. Below the header is a 'Campaign goal' section with a '+ Add goal' button. Underneath, there are two fields: 'Target audience' set to 'All visitors' and 'Campaign time frame' set to '21 Oct. 2015 - No end date'. At the bottom of the main form is a '+ Add engagement' button. On the right side, there's a status indicator 'Unpublished'.

3. Type the name of your campaign into the top field, where it currently says Campaign 1.
4. Press Enter to refresh the page.

4.2 Adding a goal

LiveEngage campaigns focus on business goals: One goal per campaign. A goal can be as generic as 'increase sales from my website' or 'reduce emails to support', or more specific, such as 'sell more tablets online'. Goals allow you to measure the success of your digital engagement strategy.

The first step in building a campaign is to decide on one of the possible LiveEngage goals that represents your business goal, for example, complete a service journey, generate leads, or sell a product or service. Choose from a variety of customizable goals that can be used as criteria for success. LiveEngage will track and display each of the goals reached as conversions on the data bar.

To add a goal:

1. On the Add Campaign page, click **+ Add Goal**. The Goal library page is displayed.

The screenshot shows the 'Goal library' modal. It has a title 'Goal library' and a close button (X). Below the title is a descriptive text: 'Define the goal you want to achieve for this campaign. Each goal type requires an indicator to measure success.' followed by a link 'Learn how to use goals'. On the right side, there's an 'Action' button. The main area contains a list of goal options. The first option, 'Interact with visitors', is highlighted with an orange border. It includes the description 'Measure the number of interactive chats and clicks on content.' and a small icon. To the right of this list is a '+ Add new' button. At the bottom right, there are 'Cancel' and 'Done' buttons.

2. Select a goal by hovering over the goal and then clicking **Edit**. The Edit goal dialog box is displayed. Alternatively, create a new goal by selecting **+ Add new**. The Add new goal dialog box is displayed.

Add new goal ✕

Choose the goal type and assign the indicator that will allow you to track its conversion.

Name: [+ Add description](#)

Select a goal type:

Conversion goals

Sell product/service Generate leads

Service goals

Service activity complete

Other goals

Increase page views Other

Cancel Save

3. Enter the name of the goal, and select the goal type. Enter the Goal indicator settings, for example the URL reached or Engagement Attribute. Click **Save**. This goal is now displayed in your Goal library.
4. Click **Done** to finish.

Note: For more information on goals, including types of goals, see [Tools to Measure your Success](#).

4.5 Defining the target audience

LiveEngage allows you to pinpoint the visitors you want to engage with. You can target visitors based on their attributes or profile by defining a new target audience and associating it with a specific campaign or multiple campaigns.

The following conditions are available under Target Audience:

Based on origin -

1. **External referral:** Targets visitors who arrived at your website from other web pages. This condition can be defined by URLs.
2. **Search keywords:** Targets visitors who enter your website by searching keywords within a search engine. The keywords used can be both manually entered or imported from a Google AdWords account. Keywords passed from Google only apply to paid search.
3. **IP range:** Targets visitors within sets of defined IP range(s).
4. **Platform:** Targets visitors browsing from specific devices, such as laptops, tablets or smartphones.
5. **Marketing source:** Targets visitors who arrived to your website from a particular source or campaign, or the affiliate they are associated with.

Based on customer info -

6. **Geo location:** Uses the consumer's IP address to identify and target them based on their location, by country, state or city.
7. **New or returning:** Identifies new or returning visitors and targets them accordingly.
8. **Customer info:** Targets visitors by their customer type e.g. VIP or Platinum, or their lifecycle status e.g. inactive or migrated.
9. **Visitor age:** Targets visitors based on their age.
10. **Time since registration:** Targets visitors according to the amount of time since they first registered as a customer (in days, months or years).
11. **Company size:** Targets visitors according to the size of their company, as defined by the number of company employees.
12. **Balance:** Targets consumers by the value of their account balance.
13. **Customer ID:** Targets visitors by an ID or range of IDs.
14. **Gender:** Targets visitors according to their gender.
15. **Store ZIP code:** Targets visitors by their association with a particular store ZIP code.
16. **Store number:** Targets visitors by their association with a particular store number.

Once you have selected and configured your target audience conditions, you will be able to associate your campaigns with this specific target audience. LiveEngage then identifies and targets the visitors accordingly. The more information you provide the system, the better your business results will be.

To define your target audience:

1. On the Campaign page, under target audience, click **Edit**.

LIVEENGAGE USER GUIDE FOR CAMPAIGN MANAGERS

Live Chat Campaign

[+ Add description](#)

Campaign goal

Interact with visitors

Target audience

Target 1

Edit

2. The target audience library is displayed.

Target audience library

Select a predefined target audience or define the attributes of visitors you want to target. Our predictive algorithms target the most valuable visitors within your target audience.

All visitors

Automatically created default target audience. Targets the high value visitors in your website.

People

+
Add new

Action ▼

Cancel

Done

3. To Edit an existing target audience, hover the mouse over it and click **Edit**. The Edit target audience page is displayed. Alternatively, to define a new target audience, click **+ Add New**. The add new target audience dialog box is displayed.

Add new target audience

Define the attributes of visitors you want to target for this campaign by selecting relevant conditions.

Target audience name

+ Add description

Conditions

Target visitors who meet ALL the following conditions:

ADD CONDITIONS BY SELECTING FROM THE MENU ON THE LEFT.

Origin

- External referral
- Search keywords
- IP range
- Platform
- Marketing source

Customer info

- Geo location
- New or Returning
- Customer info
- Visitor age
- Balance
- Customer ID
- Gender

Cancel Save

4. Type a name for your target audience, and add a description.
5. Add conditions by selecting from the condition list on the left.
6. Click **Save** to save the new or modified target audience. The target audience library is displayed. If a new target audience was created it will be selected.

Target audience library

Select a predefined target audience or define the attributes of visitors you want to target. Our predictive algorithms target the most valuable visitors within your target audience.

All visitors

Automatically created default target audience. Targets the high value visitors in your...

Target 1

654

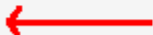
My new target audience

+ Add new

7. Select the target audience to be used and click **Done**. The Campaign page is displayed and the selected target audience name is presented under the target audience section.

Live Chat Campaign


[+ Add description](#)

Campaign goal
Interact with visitors
Target audience
My new target audience 

Note:

Some conditions are dependent on the information sent to LiveEngage through the engagement attributes. You will need to configure LiveEngage to collect the data. If you have not configured tracking yet, a message is displayed: “We haven't received customer info data in the last 24 hours”.

Customer ID

 We haven't received customer info data in the last 24 hours.

[Configure tracking](#)

Include visitors with one of the following customer IDs:

+ Exclude customer IDs

You can click the **Configure tracking** button or you can configure tracking under Data Sources > Engagement Attributes > Visitor Information category. For further information on data sources and engagement attributes, read [Engagement Attributes Overview](#) or [More data, better business results](#).

Further reading:

- [Target Visitors by Keyword Search](#)
- [Target Visitors according to Journey Flow](#)
- [Collect Valuable Customer Information](#)

4.6 Defining the campaign time frame

Select the date and time when the campaign is scheduled to run.

To select the date and time:

1. On the Add Campaign page, next to Campaign time frame, click **Edit**. The Campaign time frame is displayed.

Campaign time frame

Select the date and the time when the campaign is scheduled to run.

Start date 3 Nov. 2015 End date ☒ No end date

November 2015

Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

Operation hours

☒ All hours
 ☐ From 12:00 am to 12:00 am

Time zone

(GMT-05:00) Eastern Standard Time

Cancel Done

2. Set the dates and hours when you would like the campaign to operate.
3. Click **Done** to finish.

*Note: This feature is ideal if you have a limited-time promotion that begins and ends on specific dates. If you want it to run indefinitely, you can simply skip this step. If you later decide to stop this campaign, you can come back and click **Unpublish**.*

4.7 Engagements overview

LiveEngage provides the tools required to make the most effective engagements. Creating effective engagements can be achieved by selecting the right engagement format, writing a clear and relevant message, and creating an appealing look and feel.

LiveEngage offers a large variety of engagement types and formats. A campaign can contain multiple engagements of different types.

Engagement types can be divided into three main categories:

- **Chat engagements:** Provide your website visitors with an opportunity to engage with your agents in real time.
- **Content engagements:** Most useful when you want to make your visitors various offers that do not require real-time handling. Content banners can also be used to redirect visitors to your community page, to FAQs, to your knowledgebase, or to any other URL that you configure.
- **Offsite engagements:** Provide you with the opportunity to launch chats with your consumers from anywhere, including emails, SMS messages (triggered by IVR), printed media, online advertising, social media, and much more.

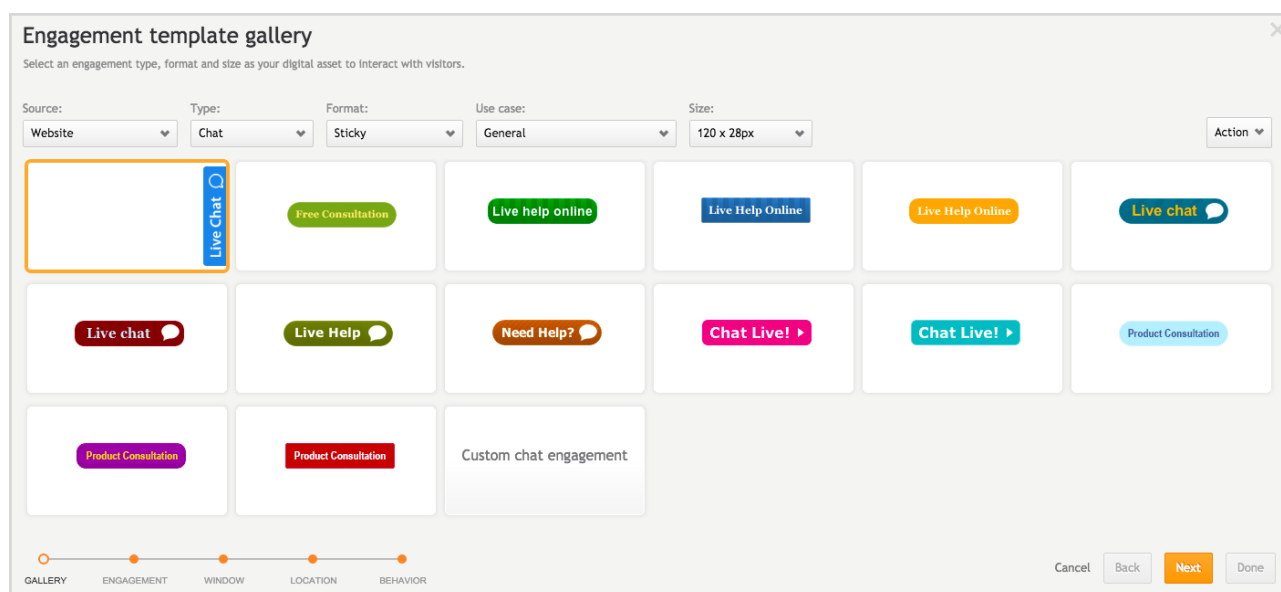
4.8 Chat engagements

Creating a chat engagement includes the following five stages:

1. Select an engagement in the Engagement template gallery.
2. Customize the engagement in the Engagement studio.
3. Configure the embedded engagement window and add surveys in the Engagement window studio.
4. Include or exclude pages on your website where an engagement can be displayed using the Location library.
5. Define when to display engagements to visitors in the Visitor behavior library.

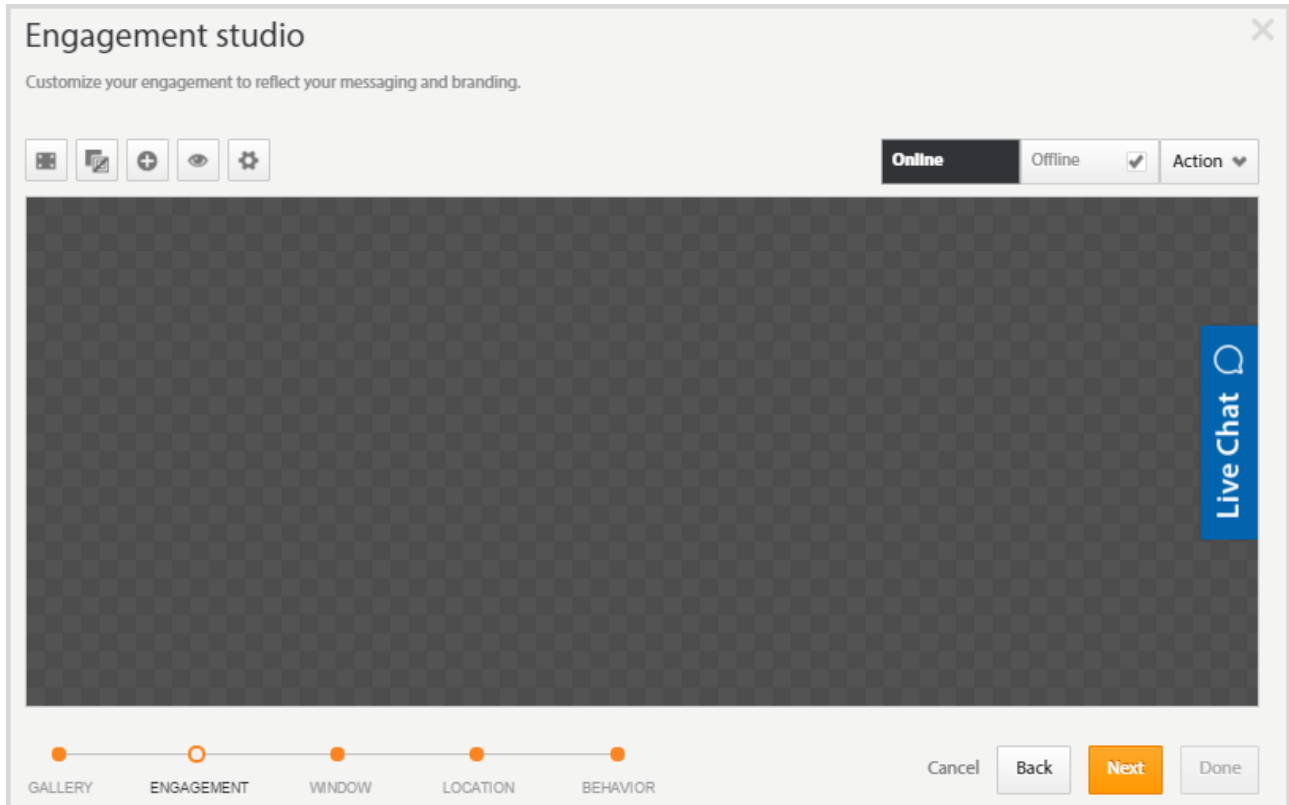
To create a chat engagement:

On the Add Campaign page, click **+ Add engagement**. The Engagement template gallery is displayed.



4.8.1 Selecting an engagement

1. From the Source dropdown menu, ensure that Website is selected. Under Type, select Chat. Select the format and size from the design options. Alternatively, design your own engagement by selecting **Action**, and then clicking **Add**.
2. Click **Next**. The Engagement studio is displayed.



4.8.2 Customizing the engagement

In the Engagement studio, use the tools to customize your engagement according to your messaging and branding.

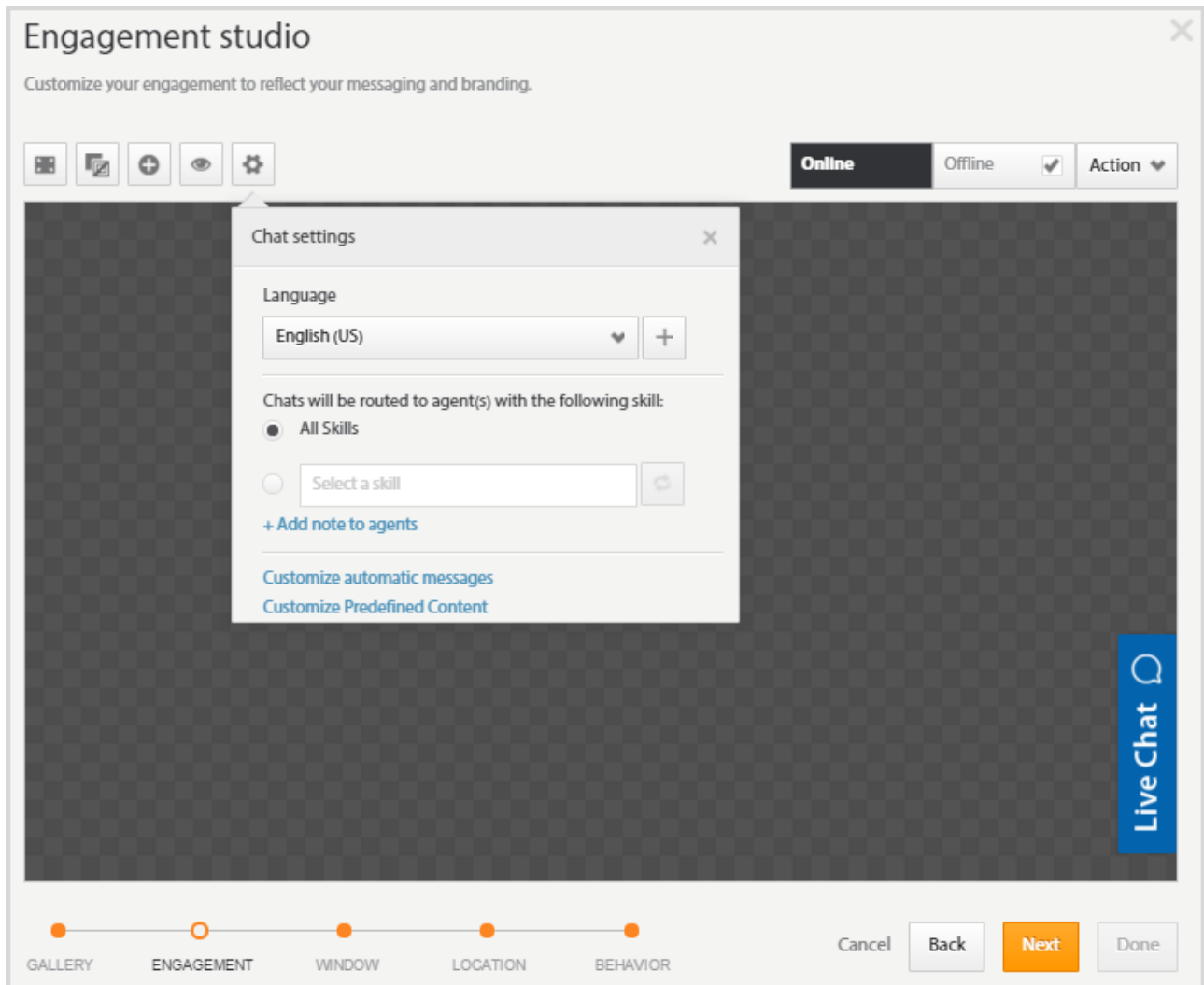
To learn more about creating effective engagements, see [How to choose the right type of engagement](#).

4.8.3 Setting the language for the engagement

During the creation of a chat engagement, you have the option to choose a specific language audience. This will then automatically change the Predefined Content, embedded engagement window, and automatic messages to the desired language for this specific engagement.

To set the language for an engagement:

1. In the Engagement studio, click the Settings menu (⚙️). Select the language you want to attach to your current engagement.

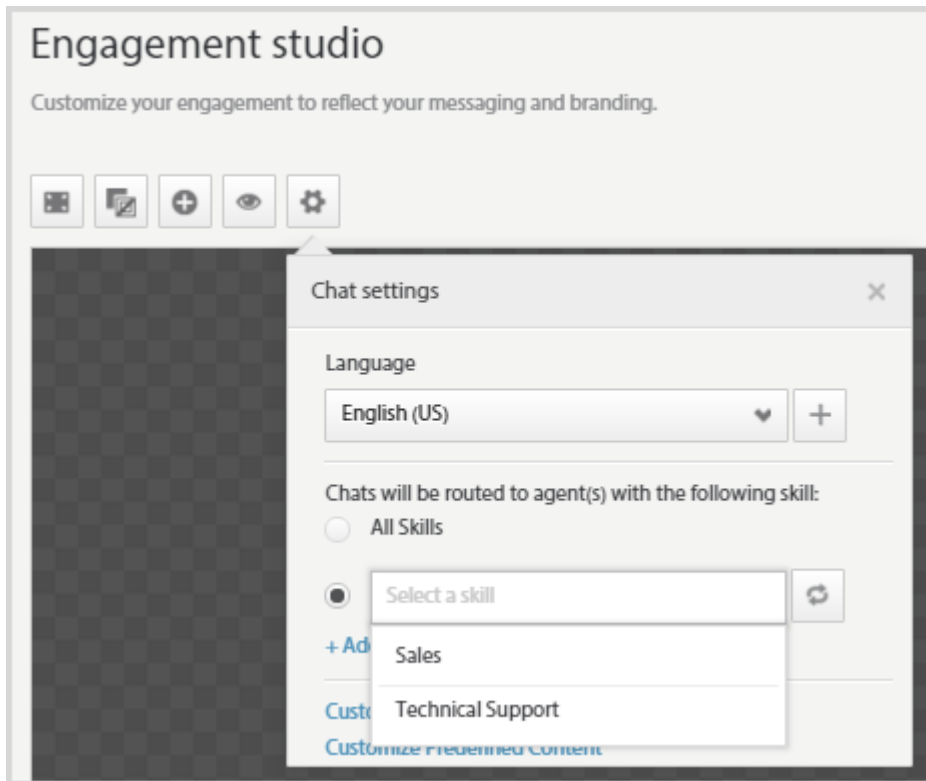


4.8.4 Assigning a skill to the engagement

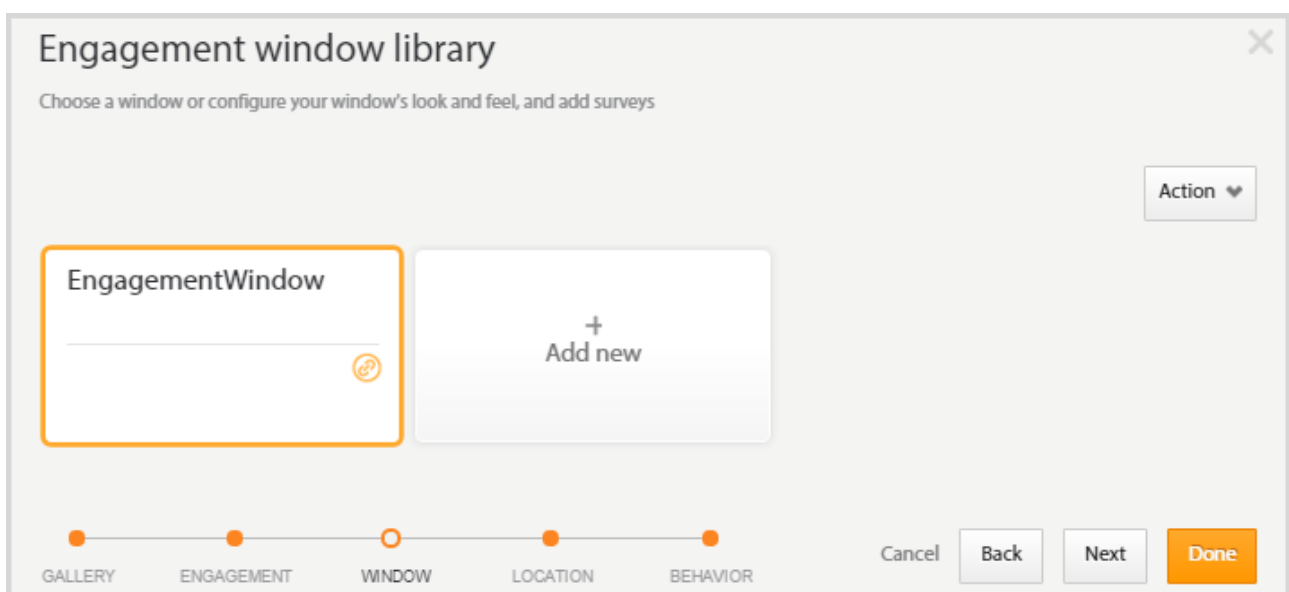
Assign a skill or skills to your engagement. This helps ensure the consumer is connected to an agent with the correct knowledge, and minimizes the need to transfer the consumer to a different agent.

To assign a skill to an engagement:

1. In the Engagement studio, click the Settings menu (⚙️). The list of skills is displayed in the dropdown menu.



2. Select the skill that you want to attach to your current engagement, and then click **Publish**. The skill is now assigned to the engagement.
3. Click **Next**. The Engagement window library is displayed.



4.8.5 Configuring and designing the Embedded Engagement Window

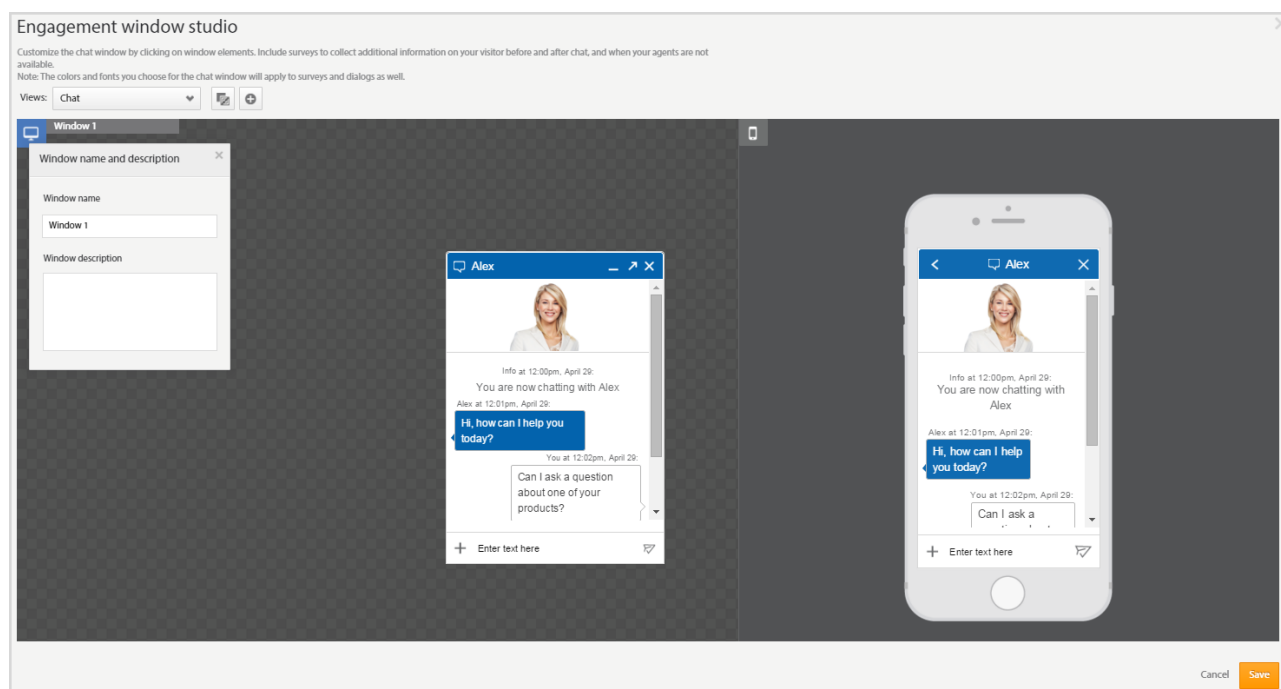
The Engagement window studio displays the look and feel of both desktop and mobile windows. The windows work on desktop and mobile in the same way, meaning that the window only needs to be set up once, and it will adjust automatically. Any change you make to the design of the desktop window takes effect in the mobile window.

Using the Engagement window studio, you can do the following:

- Customize the look and feel.
- Add your company's logo, a picture of your agent, or another image.
- Add action buttons, for example, to request an email of the chat transcript.

To access the Engagement window studio:

In the Engagement window library, hover over an existing window design and click **Edit**, or click **Add new** to design a new window. The Engagement window studio is displayed. After you design the window, it will be added to your Engagement window library.



*Note: In the Engagement window library, you can delete window designs that are not in use by clicking the **Action** menu and selecting **Delete**. In addition, you can set a default window design by clicking the **Action** menu and selecting **Set as default**. Hover over the link icon on each window to learn which campaigns are using this window.*

Edit the window name and description

The window name and description are used to help you identify windows in the library.

To edit the window name and description:

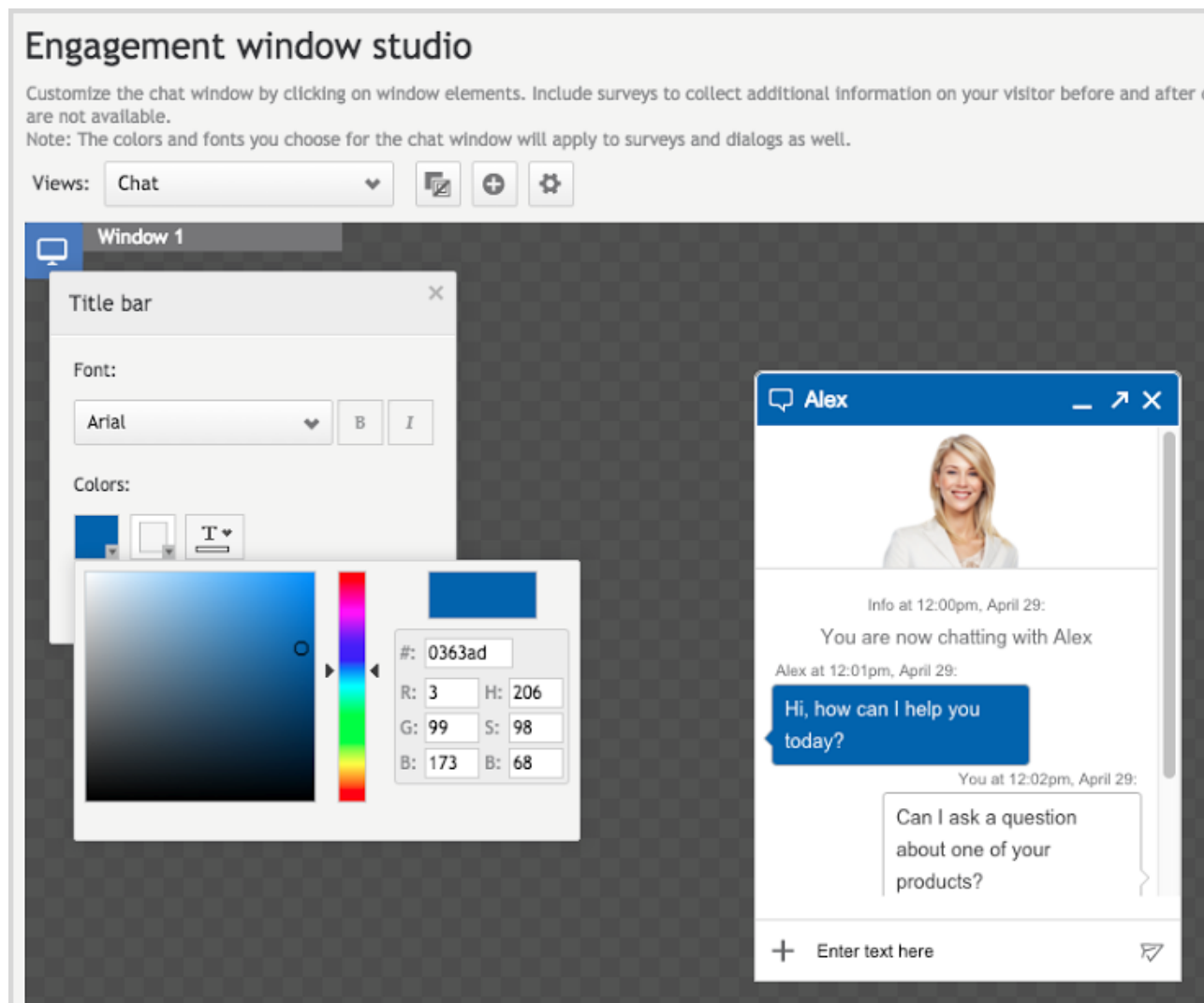
1. Select the window you want to edit. The Engagement window studio is displayed.
2. Under Window name and description, enter a new window name and type in a description. The name and description displays in the Engagement window library.

Customize chat window elements

You can fully customize the window to suit your brand by changing the colors, fonts, visitor bubble, agent bubble, system messages, info line, and window background.

To customize chat window elements:

1. Click on an element.
2. From the properties window, customize the element according to your brand. You can change the icon set of some elements to suit the background.



Tip: Choose bright icons for dark backgrounds and dark icons for bright backgrounds.

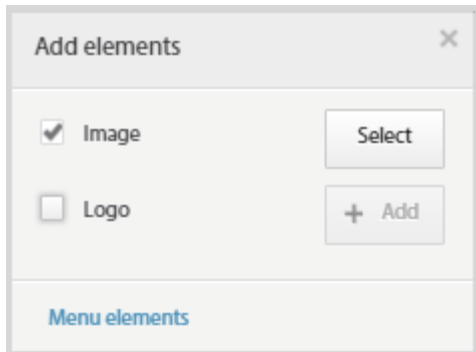
Notes:

- Surveys and dialogs inherit the main chat window's colors.*
- The background color is the same as the window background.*
- Text is the same color and font as the Automatic Messages.*
- Buttons have the same look and feel as the title bar.*

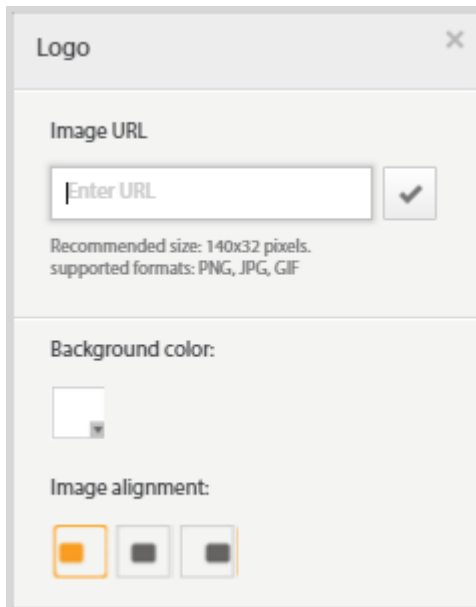
Add your company's logo to the window

To add your company's logo to the window:

1. Click the **Add Elements** button (). The Add elements menu is displayed.



2. Click the checkmark button next to logo, and then click the **+Add** button.



3. Enter the URL of the image.
4. Click the checkmark button to apply the URL.
5. Select a background color if required.

Note: If your logo is not the full body width of the window, the background color will be displayed on the sides.

6. Choose the position of the logo. You can align the logo to the left, center or right.

Note: If you add a logo but do not add an image, an error will display on the page highlighted in red. At this point you must add your image URL.

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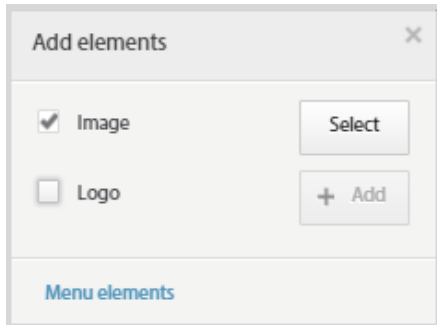
Add an image to the window

You can also customize the window by adding an image.

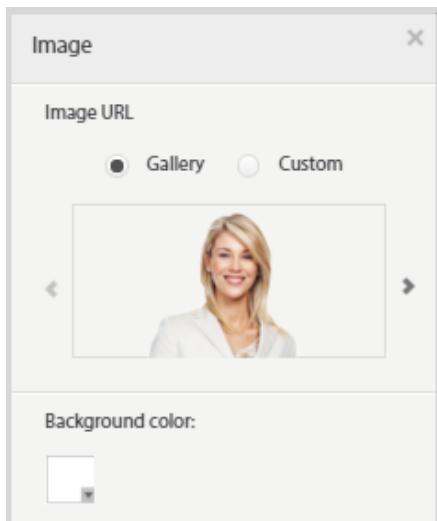
Note: For security reasons, images must be hosted over HTTPS.

To add an image to the window:

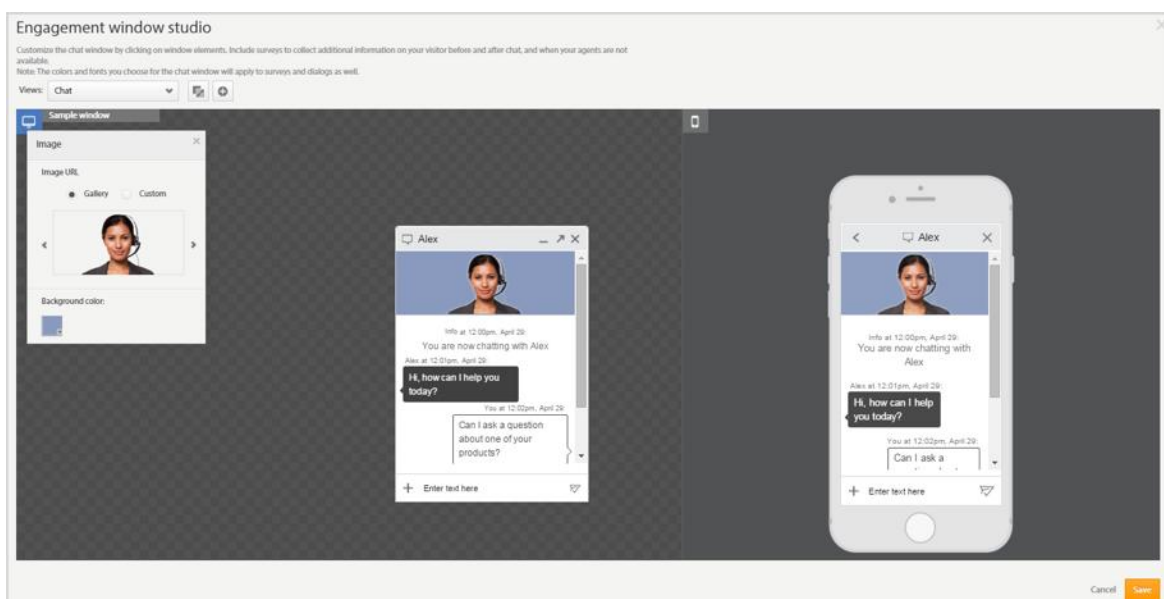
1. Click the **Add Elements** button (). The Add elements menu is displayed.



2. Click the checkmark button next to Image, and then click **Select**.



3. Select an image from the Gallery, or select **Custom** to add your own image.
4. Choose a background color, if required.



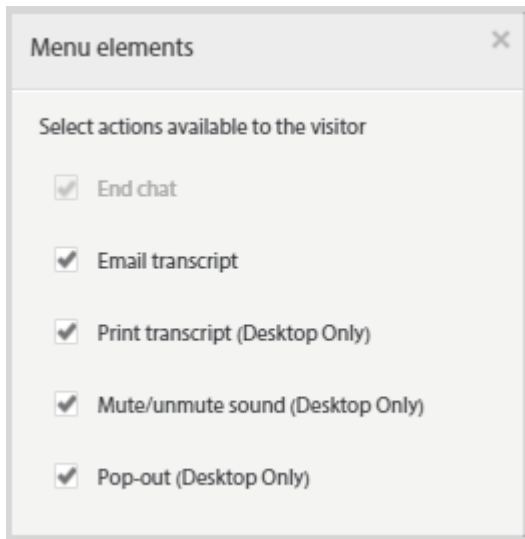
Note: If your image is not the full body width of the window, the background color will be displayed on the sides.

Add additional functionality to your window:

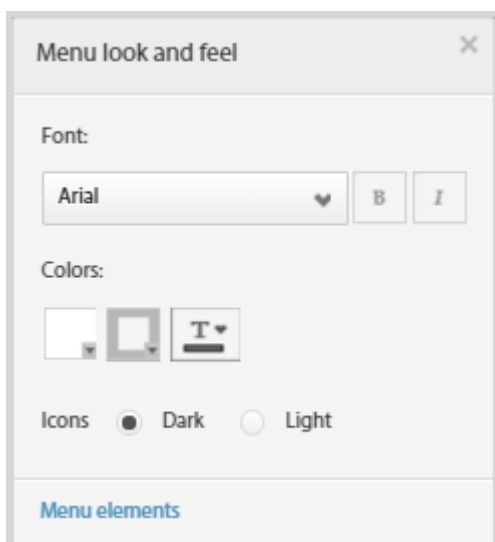
You can also add additional functionality to your window. This additional functionality includes options for your consumers, for example, they can select to receive an email transcript of the conversation, or to hear sounds when they receive a new message. There are also options to adjust the look and feel of the menu for consumers.

To add additional functionality to your window:

1. Click the **Add Elements** button (), and then the **Menu elements** button.



2. Select the action that you would like to add. A preview displays on the screen.
3. To change the font or color of the Menu elements, click on an element in the embedded engagement window. The Menu look and feel is displayed.



4. Change the font, background color and/or icon color (dark or bright), as required.

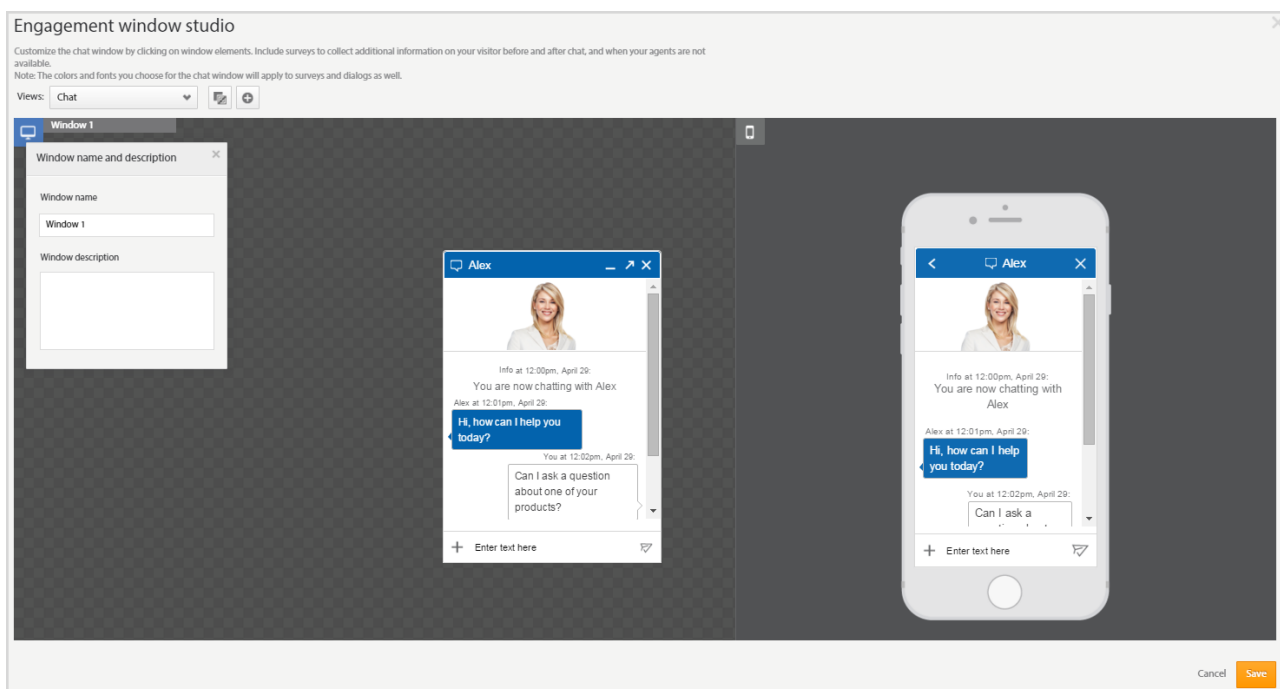
4.8.6 Adding surveys

In LiveEngage, there are four types of surveys: Pre-chat survey, post-chat survey, offline survey, and agent survey. Each of these surveys is a short, online form that is filled out at some stage of the engagement.

- **Pre-chat survey:** Provides agents with information about the visitor prior to the onset of the chat. This allows them to better understand the needs of the visitor. The visitor's details are displayed in the Agent Workspace.
- **Post-chat survey:** Presented to visitors after the chat. In these surveys, visitors are asked to rate the service provided in the chat. This information can then be used to evaluate your agents.
- **Offline survey:** Presented to visitors when no agents are available to chat. Visitors are informed that an agent will follow up with them during regular business hours. This ensures a better experience for your visitors and offers you another opportunity to chat with your customers.
- **Agent survey:** An important tool that allows you to gather data and insights from your agents about their conversations with consumers. Gathering data from the agent's perspective helps you determine and analyze the nature of the chat and understand its outcome.

To create a survey:

1. In the Engagement window studio, click the **Views** drop-down menu to view the list of surveys.



2. Click the survey you want to edit.
3. Click the question you want to edit.
4. Type in your question, and then select the **Question type**.
5. Check the **Required question** if you want the question to be mandatory, and then click **Done**.
6. Click **+ Add Question** to add a new question.
7. Click **Save** to finish.

Further reading:

- [Why you need a pre-chat survey](#)
- [Why you need an offline survey](#)
- [Assess your consumers' experience post-chat](#)
- [Gain Insights from Your Agents Post-Chat.](#)

4.8.7 Adding a routing question to your pre-chat survey

Adding a routing question to your pre-chat survey ensures that visitors get routed to an agent with the relevant skills. This allows you to provide your visitor with the flexibility to choose the type of assistance they need, and who they would like to chat with.

To add a routing question:

1. In the Engagement window studio, from the **Views** drop-down menu, select Pre-chat survey.

The screenshot displays the 'Engagement window studio' interface. At the top, there's a title bar and a brief instruction: 'Customize the chat window by clicking on window elements. Include surveys to collect additional information on your visitor before and after chat, and when your agents are not available. Note: The colors and fonts you choose for the chat window will apply to surveys and dialogs as well.' Below this, a 'Views' dropdown menu is set to 'Pre-chat survey'. The main workspace is divided into two sections. On the left, a desktop preview shows a survey form with the following elements: 'What is your name? *' (text input), 'Email Address' (text input), 'Phone Number' (text input), 'What is the nature of your inquiry?' (dropdown menu with 'pick one...' selected), and an '+ Add question' button. On the right, a mobile device preview shows a post-chat survey screen with the text 'Thanks for chatting with us' and a question 'Was the issue you contacted us about resolved during this engagement?' with 'Yes' and 'No' radio button options. At the bottom right of the studio window are 'Cancel' and 'Save' buttons.

2. Click the question: What is the nature of your inquiry? This is the default routing question.

What is your name? *

Email Address

Phone Number

Question:

What is the nature of your inquiry?

Question type

Routing ☐ Required question

Text

Route to Default Skill

Skill

Technical Support

Add

3. If you want to change the default routing question, click on the Question field and type the question you want to display to the visitor.
4. Click the **Required question** checkbox if you want this question to be mandatory.
5. From the Skill drop-down menu, attach the related skill.
6. To add another answer to the drop-down menu, click **Add answer**.

Question:

What is the nature of your inquiry?

Question type

Routing ☐ Required question

Text

Route to Default Skill

Skill

Technical Support

Text

New answer

Skill

Select skill

Add

Done

+ Add question

7. Using the arrow keys, you can change the order of the answers.
8. When you have finished, click **Done**, and then **Save**.

Notes:

- i. *Routing questions interfere with the skill you selected on the engagement level. For this reason, you should remove the skill definition from any engagement that includes a routing question.*
- ii. *Each pre-chat survey can contain only one routing question.*

4.8.8 Adding a CSAT question to your post-chat survey

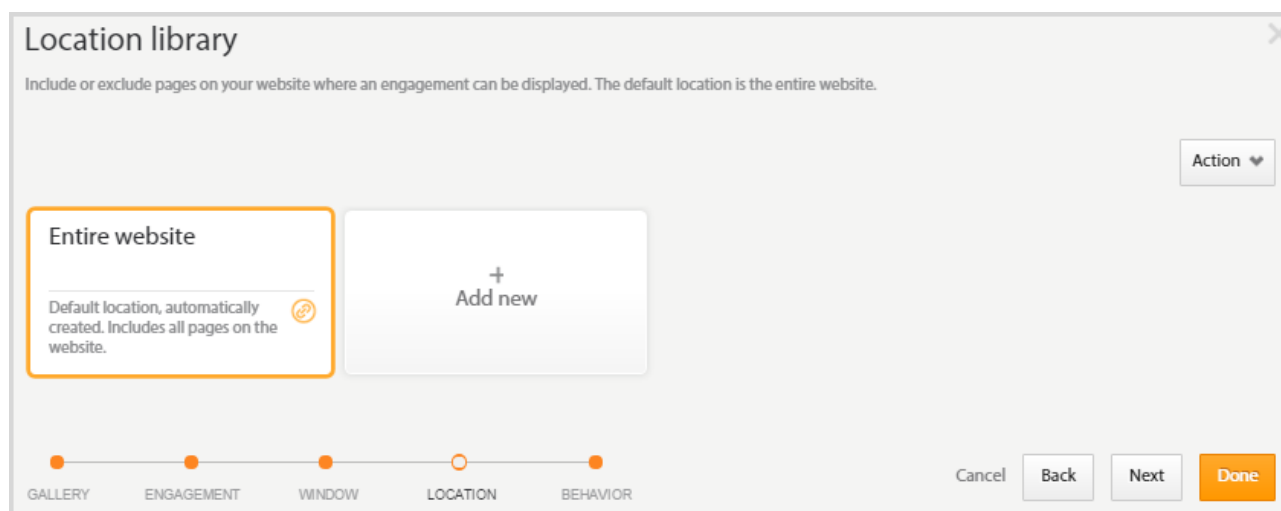
Asking your consumers to complete a brief survey at the end of a conversation can provide you with valuable input and insights about their experience. The post-chat survey can include questions about the wait time, the information provided, the agent's service, their overall level of satisfaction, or any other comment your consumer may have.

When creating a post-chat survey, you can ask any of the following questions:

- Was your query resolved? (use a yes/no radio button)
- How would you rate the service provided? (use a scale combining both numbers and words, such as: 5=excellent, 4=good, 3=average, 2=poor or 1=extremely poor)
- How likely is it that you would recommend [Your Company] to a friend or colleague? (use the Net Promoter Score scale of 0-10)
- Would you like us to send you a transcript of the chat? (use a yes/no radio button along with a text area for their e-mail)
- Comments (use a text area)

4.8.9 Assigning a location to an engagement

Assigning a location to an engagement enables you to target users who visited particular pages of your website, and to narrow down the customers that you want to chat with. You can use one of the predefined locations, such as Entire Website, or focus your targeting on a particular page or set of pages.



To edit the location of your engagement:

1. If you want your engagement to appear on every page of your website, click **Entire website**. Alternatively, to focus your targeting on a particular page or set of pages, click **Add new location**. This displays the Add new location page.

2. In the top field, enter a location name. Press Enter to refresh the page.
3. In the dropdown menu, select Contains, Exact, or Advanced. Copy the target URL into the field on the right.
4. Click **+ Add URL** to add more URLs.
5. If you want to exclude the engagement from specific pages, click **+ Exclude location** and copy the target URL into the field on the right. Click **Save**.
6. When you have finished, click **Next**. The Visitor behavior library is displayed.

Note: Locations are shared throughout your account. If you modify a location, the change will be applied to any other engagements that use this location.

4.8.10 Defining the visitor behavior

LiveEngage enables you to plan goal-oriented campaigns aimed at specific target audiences. You can create various engagements within each campaign, and display them based on visitor behavior and location on your website.

The following conditions are available to define visitor behavior:

Based on navigation:

1. **Flow**: Identifies visitors based on a predefined browsing pattern within your website. Flows can be defined either by using URLs or by using sections (engagement attributes).
2. **Time on Location**: Targets visitors who have spent more than the defined time in selected location(s) during a single session. Locations can be defined either by using URLs or by using sections (engagement attributes).
3. **Visited Location**: Targets visitors from selected locations on the website.
4. **About to Abandon**: Engages visitors who are about to abandon your site.

Based on eCommerce:

5. **Cart Value**: Targets visitors according to the value of their shopping cart.
6. **Products in Cart**: Targets visitors who have a certain product in their cart, products with a certain SKU (stock keeping unit), or a whole product category.

7. **Viewed Product:** Defines visitor behaviors to discover which products are attracting the attention of your customers.

Based on visitor journey:

8. **Visitor error** - Targets visitors who experienced specific errors.
9. **Engaged in session** - Targets visitors who interacted with LiveEngage engagement according to their status: exposed, declined, clicked or interacted with an engagement.
10. **Service activity** - Targets visitors by their service activity status e.g completed, approved, declined, in progress etc.

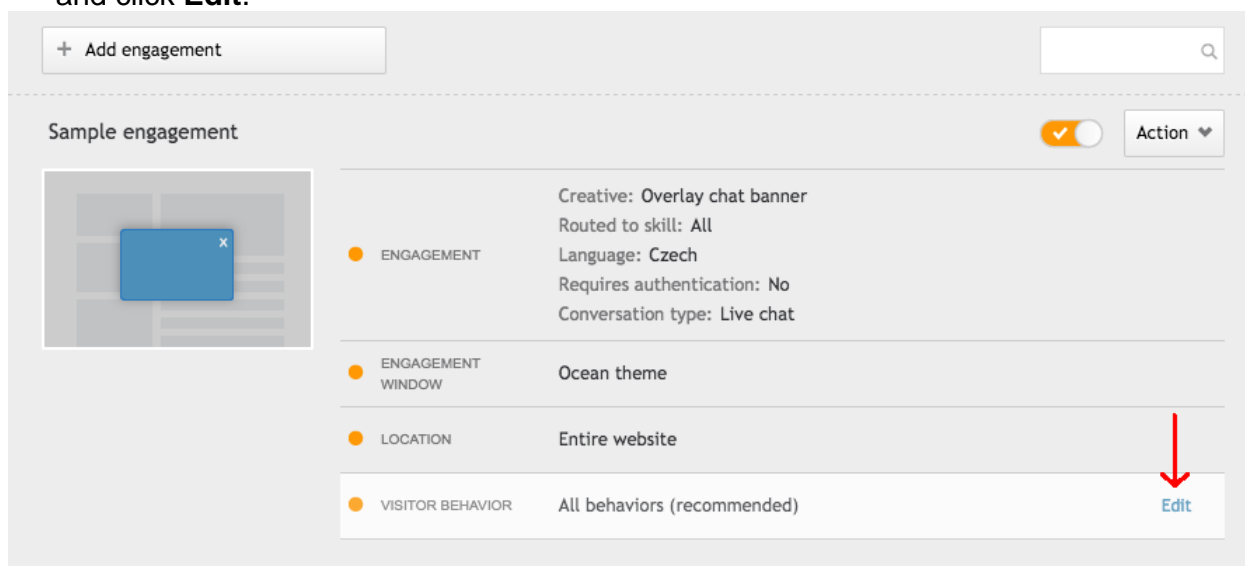
Visitors may be targeted by more than one engagement on the same page, at the same time, although LiveEngage may not necessarily display all the engagements to the visitor. In such cases, LiveEngage uses a decision mechanism to determine the engagements that will be displayed, taking the following factors into consideration:

- Campaign Priority
- Engagement Zones
- Engagement Channels and Agent Status

Note: For more information on the LiveEngage decision mechanism, see [Running Campaigns with Multiple Engagements](#).

To define the visitor behavior:

1. On a specific campaign page under specific engagement, hover over “visitor behavior” and click **Edit**.



2. The visitor behavior library will be displayed. Select an existing visitor behavior by hovering over one of the options and clicking **Edit**. Alternatively, to define a new visitor behavior, click **+ Add New**.

Visitor behavior library

Use the automatically generated behavior conditions, or customize when to display engagements to visitors according to their behavior on your website.

All behaviors (recommended)

Allows you to target all of this campaign's target audience regardless of visitor behavior



Sample behavior

[Edit](#)

+
Add new

3. The add new visitor behavior dialog box is displayed.

Add new visitor behavior

Define when to display engagements to your visitors according to their behavior, by selecting relevant conditions.

+ Add description

Conditions

Navigation

Flow

Time on location

Visited location

About to abandon

eCommerce

Target visitors who meet ALL the following conditions:

ADD CONDITIONS BY SELECTING FROM THE MENU ON THE LEFT.

4. Type a name for your visitor behavior, and add a description.
5. Add conditions by selecting from the condition list on the left. Click **Save**.
6. Click **Save** to save the new or modified visitor behavior. The visitor behavior library is displayed. If a new visitor behavior was created it will be selected.

Visitor behavior library

Use the automatically generated behavior conditions, or customize when to display engagements to visitors according to their behavior on your website.

Sample behavior

New behavior

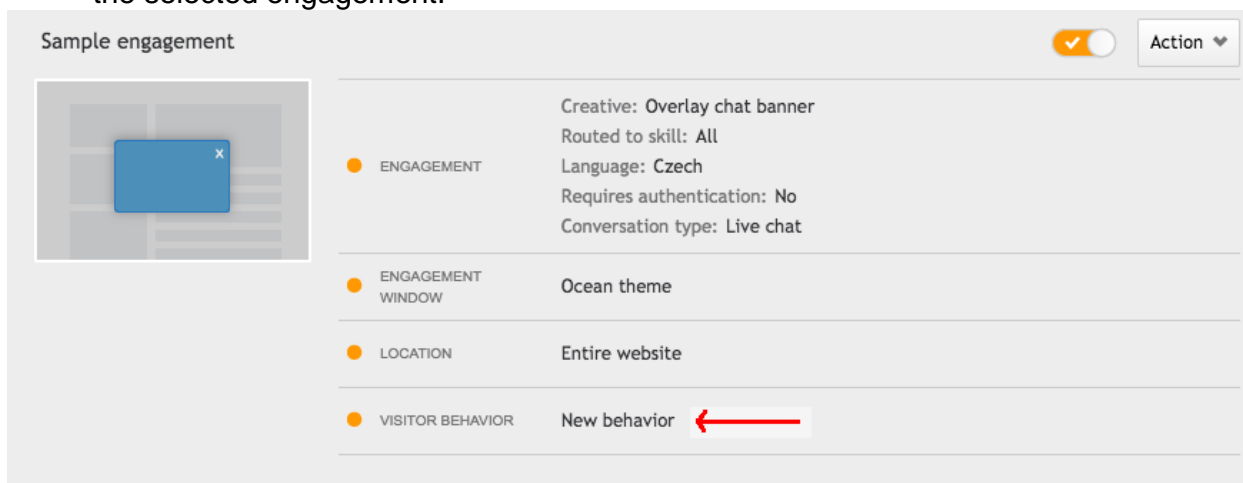
All behaviors (recommended)

Allows you to target all of this campaign's target audience regardless of visitor behavior



+
Add new

7. Select the visitor behavior to be used and click **Done**. The Campaign page is displayed and the selected visitor behavior name is presented under the visitor behavior section of the selected engagement.



Sample engagement

ENGAGEMENT

Creative: Overlay chat banner
Routed to skill: All
Language: Czech
Requires authentication: No
Conversation type: Live chat

ENGAGEMENT WINDOW

Ocean theme

LOCATION

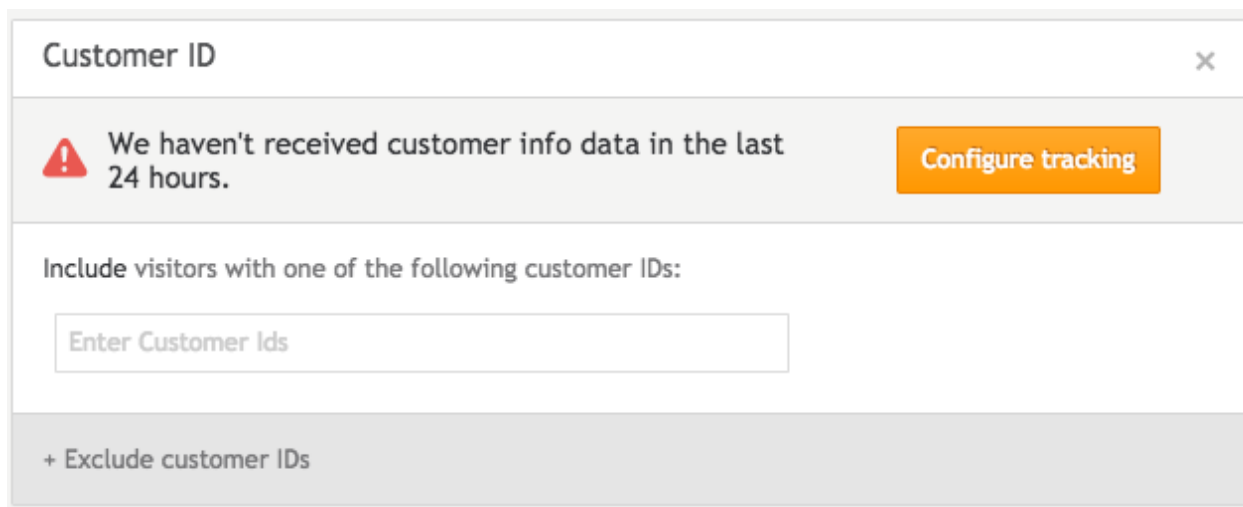
Entire website

VISITOR BEHAVIOR

New behavior

Notes

Some conditions are dependent on the information sent to LiveEngage through the engagement attributes. You will need to configure LiveEngage to collect the data. If you have not configured tracking yet, a message is displayed: "We haven't received customer info data in the last 24 hours".



Customer ID

We haven't received customer info data in the last 24 hours.

Configure tracking

Include visitors with one of the following customer IDs:

Enter Customer Ids

+ Exclude customer IDs

You can click the **Configure tracking** button or you can configure tracking under Data Sources > Engagement Attributes > Visitor Information category.

- If the data appears on the page, LiveEngage can extract it without code. Many web pages do not display the data, and so you may need to use code for this Engagement Attribute.
- The data on the page must match the name of the visitor behavior list items exactly.

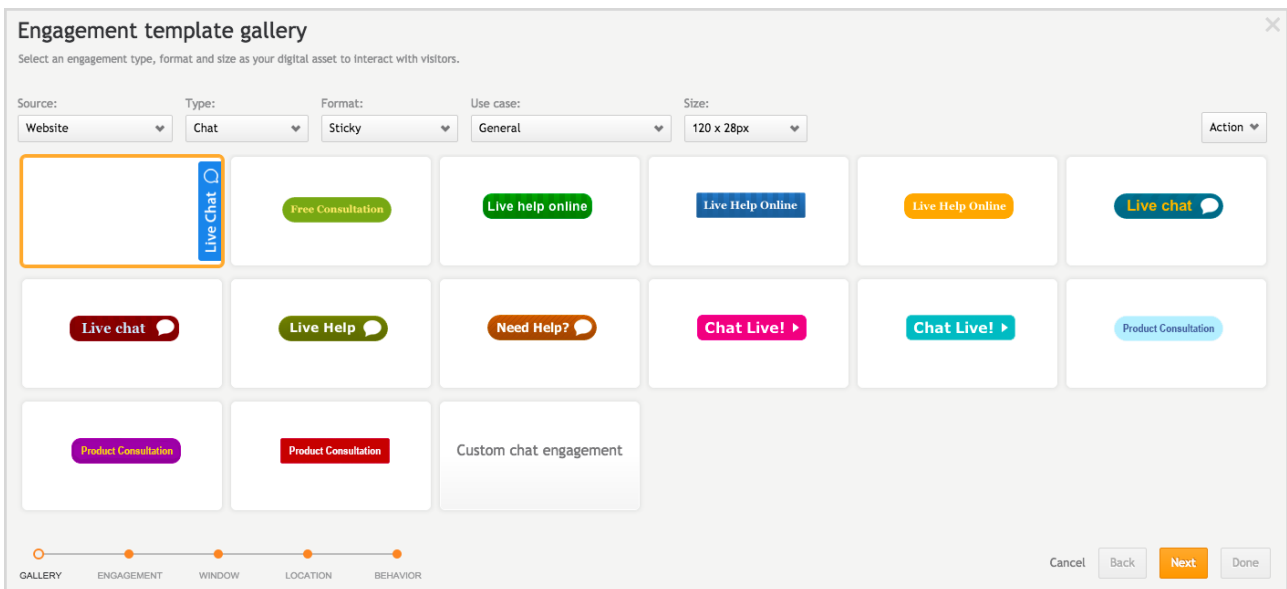
4.9 Content engagements

Creating a content engagement includes the following four stages:

1. Selecting an engagement in the Engagement template gallery.
2. Customizing the engagement in the Engagement studio.
3. Including or excluding pages on your website where an engagement can be displayed using the Location library.
4. Defining when to display engagements to visitors in the Visitor behavior library.

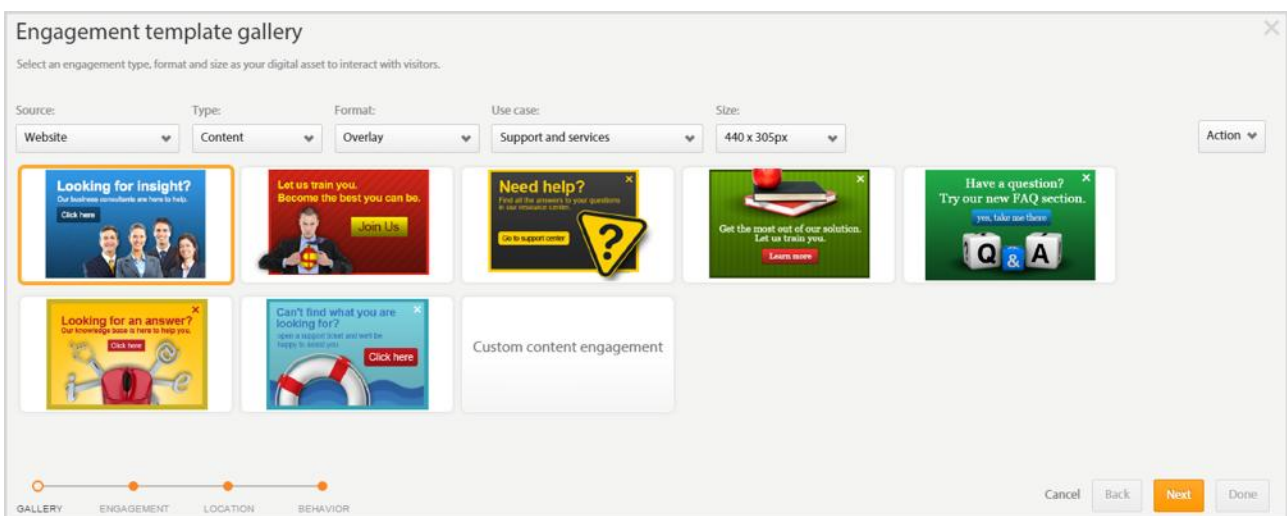
To create a content engagement:

On the Add Campaign page, click **+ Add engagement**. The Engagement template gallery is displayed.

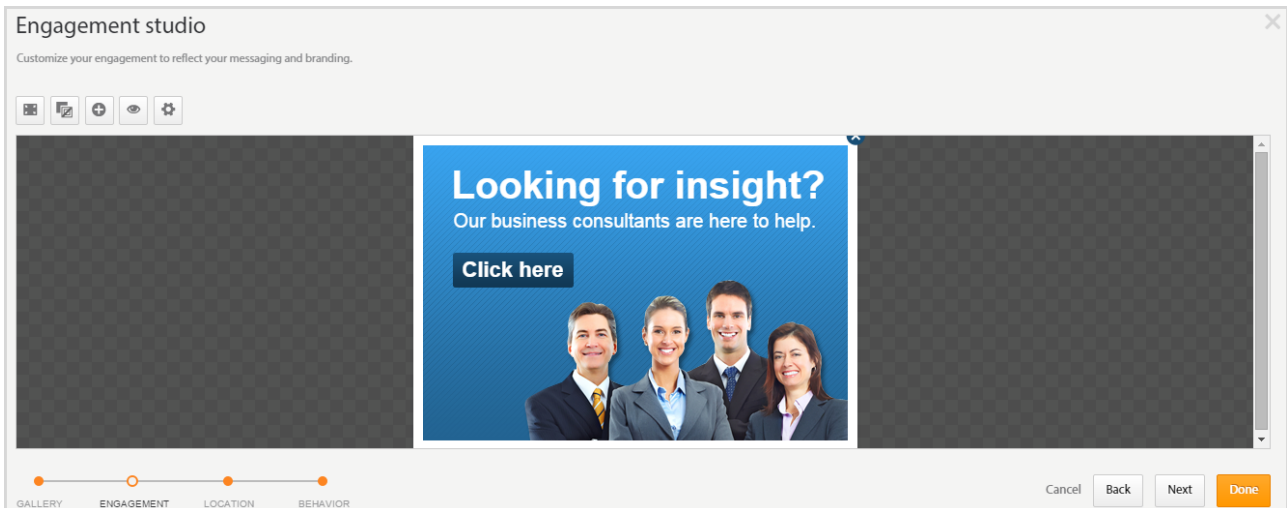


4.9.1 Selecting an engagement

1. From the Source dropdown menu, ensure that Website is selected. Under Type, select Content. Select the format and size from the design options. Alternatively, design your own engagement by selecting **Action**, and then clicking **Add**.



2. Click **Next**. The Engagement studio is displayed.



4.9.2 Customizing the engagement

In the Engagement studio, use the tools to customize your engagement according to your messaging and branding.

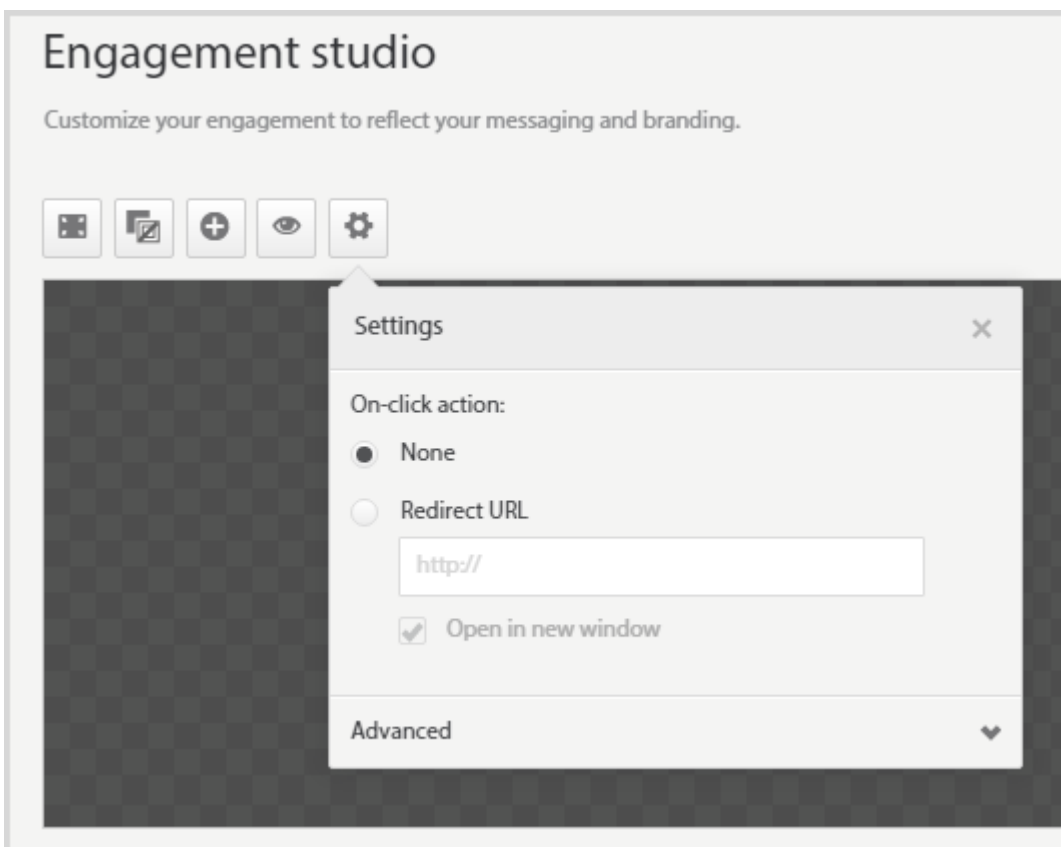
To learn more about creating effective engagements, see [How to choose the right type of engagement](#).

4.9.3 Setting the on-click action

You can select the behavior of the engagement when the consumer clicks on it.

To set the on-click action:

1. In the Engagement studio, click the Settings menu (⚙️).



2. Under On-click action, select your preferred behavior. If you want your consumers to be redirected to a different URL, enter the URL into the box.
3. Select whether or not you would like the URL to be opened in a new window.
4. Click **Next**. The Location library is displayed.

4.9.4 Assigning a location to an engagement

Assigning a location to an engagement enables you to target users who visited particular pages of your website, and to narrow down the customers that you want to chat with. You can use one of the predefined locations, such as Entire Website, or focus your targeting on a particular page or set of pages.

To edit the location of your engagement:

1. If you want your engagement to appear on every page of your website, click **Entire website**. Alternatively, to focus your targeting on a particular page or set of pages, click **Add new location**. This displays the Add new location page.

2. In the top field, enter a location name. Press Enter to refresh the page.

3. In the dropdown menu, select Contains, Exact, or Advanced. Copy the target URL into the field on the right.
4. Click **+ Add URL** to add more URLs.
5. If you want to exclude the engagement from specific pages, click **+ Exclude location** and copy the target URL into the field on the right. Click **Save**.
6. When you have finished, click **Next**. The Visitor behavior library is displayed.

Note: Locations are shared throughout your account; if you modify a location, the change will be applied to any other engagements that use this location.

4.9.5 Defining the visitor behavior

LiveEngage enables you to plan goal-oriented campaigns aimed at specific target audiences. You can create various engagements within each campaign, and display them based on visitor behavior and location on your website.

Visitors may be targeted by more than one engagement on the same page, at the same time, although LiveEngage may not necessarily display all the engagements to the visitor. In such cases, LiveEngage uses a decision mechanism to determine the engagements that will be displayed, taking the following factors into consideration:

- Campaign Priority
- Engagement Zones
- Engagement Channels and Agent Status

Note: For more information on the LiveEngage decision mechanism, see [Running Campaigns with Multiple Engagements](#).

To define the visitor behavior:

1. In the Visitor behavior library, click **+ Add new**.

The screenshot shows a modal window titled "Add new visitor behavior" with a close button (X) in the top right corner. Below the title is a subtitle: "Define when to display engagements to your visitors according to their behavior, by selecting relevant conditions." There is a text input field for "Visitor behavior name" and a link "+ Add description" below it. The main area is divided into two sections. On the left, under the heading "Conditions", there are three expandable categories: "Navigation" (with sub-items: Flow, Time on location, Visited location, About to abandon), "eCommerce" (with sub-items: Cart value, Products in cart, Viewed Product), and "Visitor Journey" (with sub-items: Visitor Error, Engaged in Session, Service Activity). On the right, under the heading "Target visitors who meet ALL the following conditions:", there is a large empty box with the text "ADD CONDITIONS BY SELECTING FROM THE MENU ON THE LEFT." At the bottom right of the modal are "Cancel" and "Save" buttons.

2. Select an existing target audience by hovering over one of the options and clicking **Edit**. The Edit target audience dialog box is displayed. Alternatively, to define a new target audience, click **+ Add New**. The Add new target audience dialog box is displayed.
3. Type a name for your visitor behavior, and add a description.
4. Add conditions by selecting from the condition list on the left. Click **Save**.
5. Click **Done** to save this visitor behavior.
6. Configure LiveEngage to collect the data. If you have not yet configured tracking, a message is displayed: "We haven't received customer info data in the last 24 hours. You can click the **Configure tracking** button or you can configure tracking under Data Sources > Engagement Attributes > Visitor Information category."

Notes

- i. If the data appears on the page, LiveEngage can extract it without code. Many webpages do not display the data, and so you may need to use code for this Engagement Attribute.
- ii. The data on the page must match the name of the visitor behavior list items exactly.

4.10 Offsite Engagements

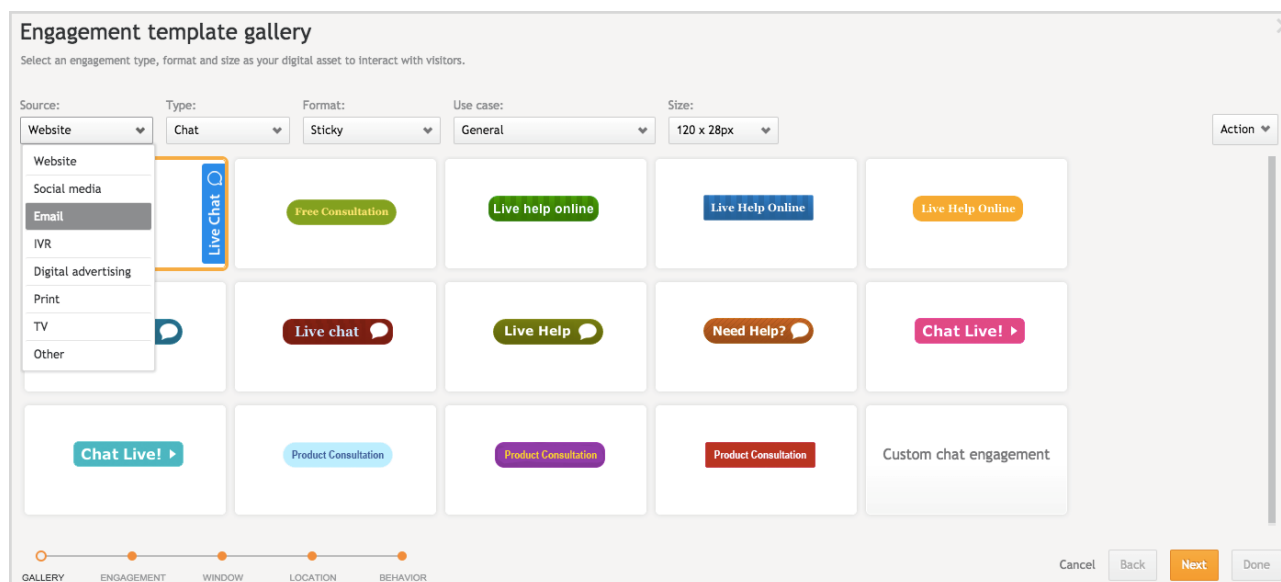
Offsite engagements provide you with the opportunity to launch chats with your consumers from anywhere. When creating an offsite engagement, you create a URL that will refer your consumers to a private chat with your Customer Care Professional (CCP). Use this link anywhere you want to engage with your consumers.

To learn more about offsite engagements, refer to the [Offsite Engagements FAQ](#).

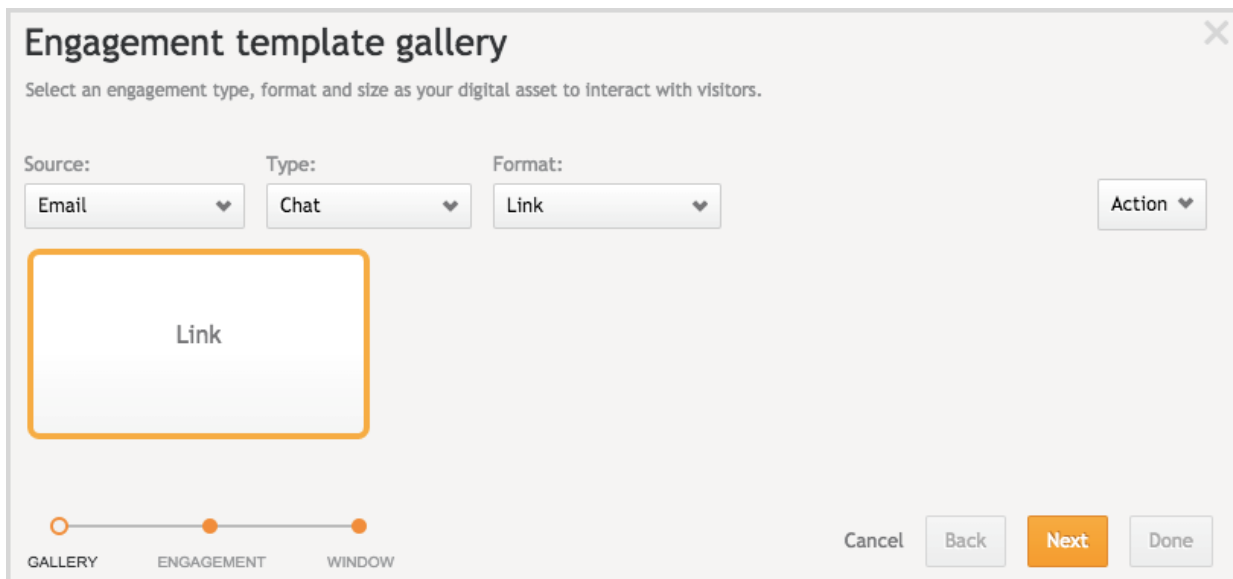
4.10.1 Creating an offsite engagement:

To create an offsite engagement:

1. Create a Campaign and define the target audience, goal and timeframe. Click **Add engagement**.



2. From the Source dropdown menu, select where you want to use the engagement.



Engagement template gallery

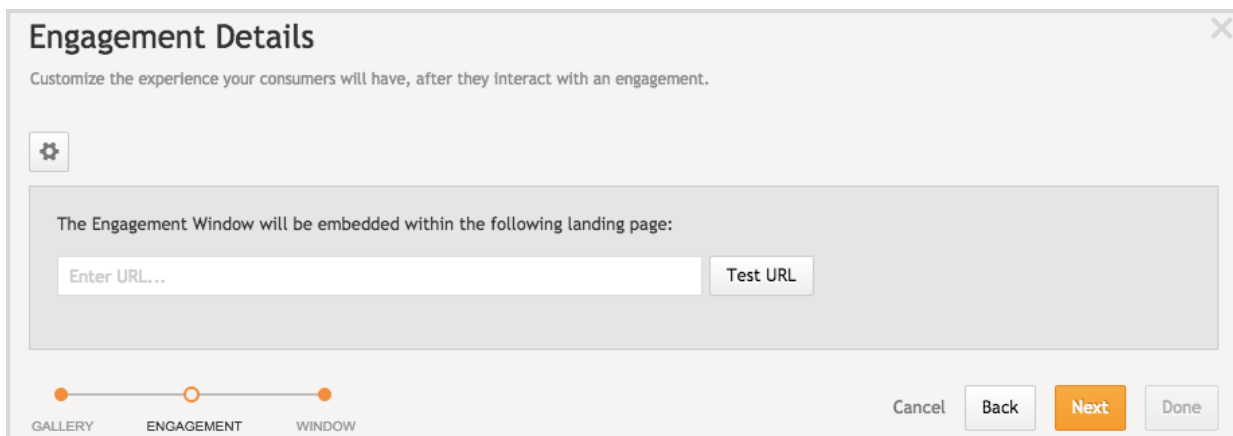
Select an engagement type, format and size as your digital asset to interact with visitors.

Source: Type: Format: Action

GALLERY ENGAGEMENT WINDOW

Cancel Back Next Done

3. Click **Next**.



Engagement Details

Customize the experience your consumers will have, after they interact with an engagement.

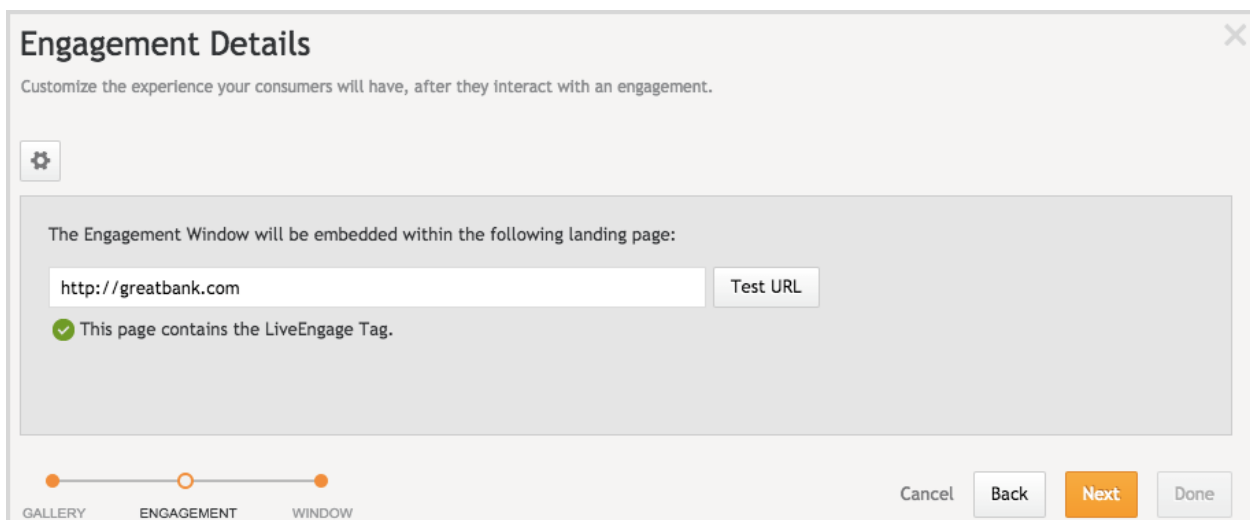
GALLERY ENGAGEMENT WINDOW

Cancel Back Next Done

4. Enter the URL of the landing page where you want to embed the chat window. This is the URL to which your consumers will be redirected when clicking the Engagement URL.

Note: The landing page should contain the LiveEngage Tag.

5. Test your landing page by clicking Test URL.



Engagement Details

Customize the experience your consumers will have, after they interact with an engagement.

✓ This page contains the LiveEngage Tag.

GALLERY ENGAGEMENT WINDOW

Cancel Back Next Done

- Click the Settings menu (⚙️), and then select the engagement language and skill to which the consumer will be routed.

The screenshot shows the 'Engagement Details' window. At the top, it says 'Customize the experience your consumers will have, after they interact with an engagement.' Below this is a settings icon (⚙️) and a 'following landing page:' section with a text input field and a 'Test URL' button. A 'Chat settings' modal is open, showing 'Language' set to 'English (US)' with a dropdown arrow and a '+' button. Below this, it says 'Chats will be routed to agent(s) with the following skill:' with two radio buttons: 'All Skills' (selected) and 'Select a skill' (with a dropdown arrow and a settings icon). At the bottom of the modal are links for '+ Add note to agents', 'Customize automatic messages', and 'Customize Predefined Content'. At the bottom of the main window is a progress bar with three dots labeled 'GALLERY', 'ENGAGEMENT' (active), and 'WINDOW'. To the right are buttons for 'Cancel', 'Back', 'Next' (highlighted in orange), and 'Done'.

- Click **Next**.
- In the Engagement window gallery, select the engagement window look and feel. See 4.8.5 for further information on configuring and designing the embedded engagement window.
- For an IVR offsite engagement, you can associate the engagement to a specific IVR section. For more information on IVR offsite engagements, refer to [IVR Deflection Solution](#).
- Click **Done** to save the engagement.

In the Campaigns page

1. After creating the engagement, copy the Engagement URL provided by LiveEngage and link to it from your offsite media.

E-Mail Notification Action ▾ Publish

[+ Add description](#)

Campaign goal
AutoPay

Target audience
All visitors

Campaign time frame
15 Jul. 2015 - No end date

[+ Add engagement](#)

Engagement 1

Engagement URL ✓ Action ▾

Use the URL below to start engaging with consumers.

<https://qtrv-wng081.dev.lprd.net/api/account/qa77962406/route/campaig> [Learn more](#)

ENGAGEMENT Creative: Link
Routed to skill: All
Language: English (US)

WINDOW ENGAGEMENT Service Window

+ Add campaign

2. Enable the engagement and publish the campaign.

E-Mail Notification Action ▾ Publish

[+ Add description](#)

Campaign goal
AutoPay

Target audience
All visitors

Campaign time frame
15 Jul. 2015 - No end date

[+ Add engagement](#)

Engagement 1

Engagement URL ✓ Action ▾

Use the URL below to start engaging with consumers.

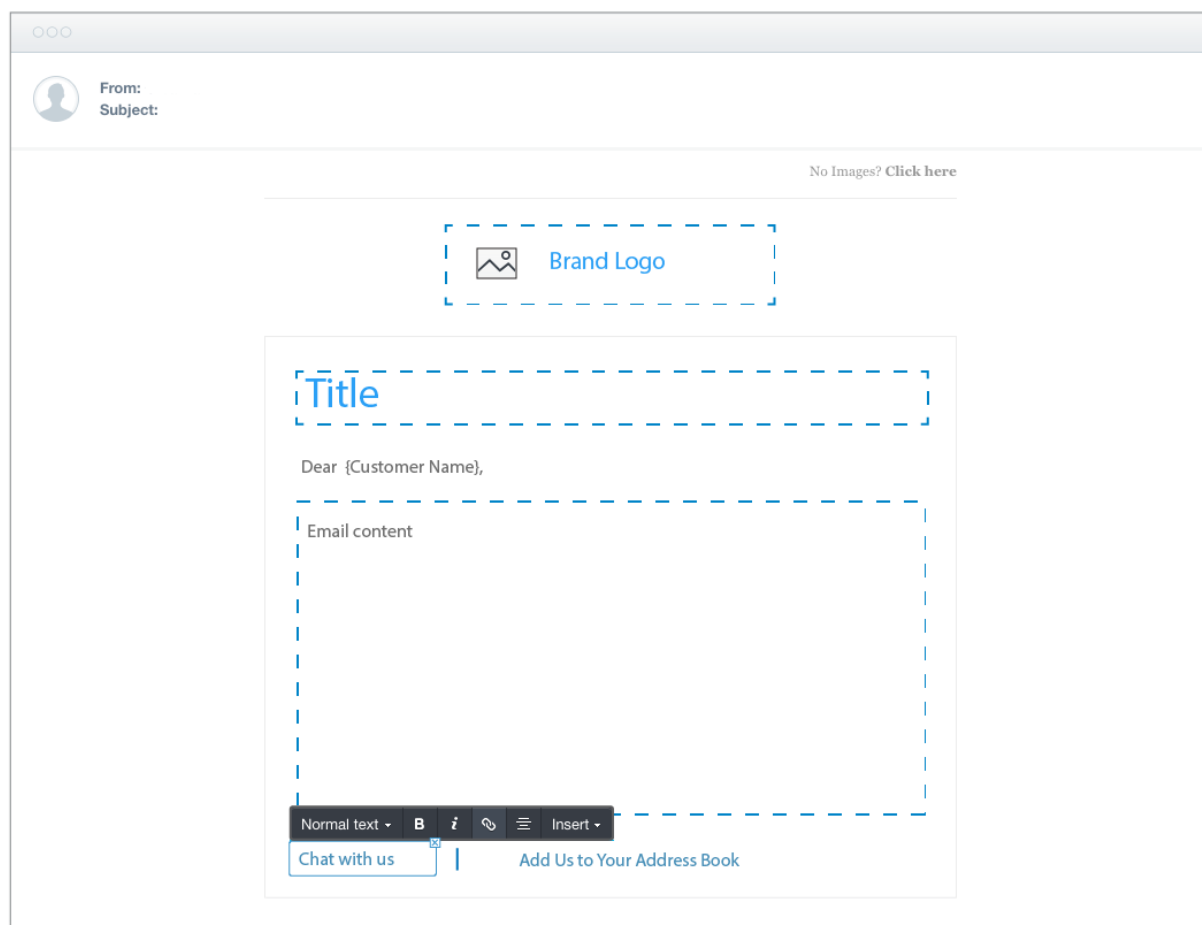
<https://qtrv-wng081.dev.lprd.net/api/account/qa77962406/route/campaig> [Learn more](#)

ENGAGEMENT Creative: Link
Routed to skill: All
Language: English (US)

WINDOW ENGAGEMENT Service Window

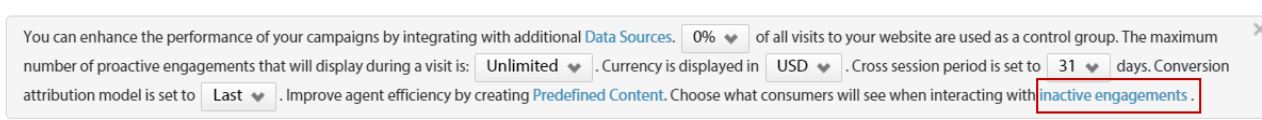
+ Add campaign

3. Use the Engagement URL in your offsite media (email template, social media, etc.).



4.10.2 Creating an inactive offsite engagement

1. Navigate to the Campaigns page footnote.



2. Click **Inactive engagements**, and then choose from the existing offline surveys, or enter the URL to which consumers will be redirected.

Note: The offline survey / landing page is set at the account level and is for all campaigns.

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Inactive engagement

Choose what consumers will see when interacting with an inactive engagement. An engagement is inactive when it has been disabled, deleted or its campaign has been unpublished, deleted or expired. [Learn more](#)

When an engagement is inactive, consumers will see:

☒ Offline survey

Orange

☐ Landing page

Enter URL...

Preview:

Thank you for contacting us. Our Customer Care Professionals are currently not available. Please leave your details and we will contact you as soon as possible.

From Name: *

From e-mail address: *

Phone Number

Subject

Cancel

Save

The survey is displayed as an inactive offsite engagement.

Engagement Window

https://qtrv-wap11.dev.lprd.net/le_unified_window/index.html?pUnifiedWindowConfig={"env":"qa","engConf":{"lang":"en-US","lewid":945933710,"offsiteEngContext":"edd..."

Contact us

Thank you for contacting us. Our Customer Care Professionals are currently not available. Please leave your details and we will contact you as soon as possible.

From Name: *

Enter text here

From e-mail address: *

Enter text here

Phone Number

Enter text here

Subject

Enter text here

Message: *

Enter text here

Cancel

Submit

4.11 Multi-engagement campaigns

LiveEngage enables you to plan goal-oriented campaigns aimed at specific target audiences. You can create various engagements within each campaign and display them based on visitor behavior and location on your website. Visitors may be targeted by more than one engagement on the same page, at the same time, although LiveEngage may not necessarily display all the engagements to the visitor. In such cases, LiveEngage uses a decision mechanism to determine the engagements that will be displayed, taking the following factors into consideration:

- Campaign Priority
- Engagement Zones
- Engagement Channels and Agent Status

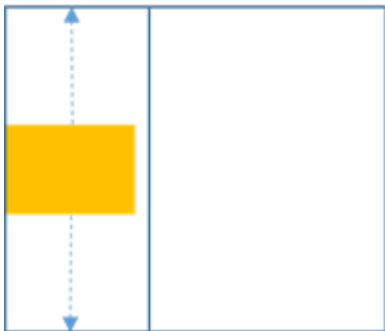
Campaign Priority

You can set your campaigns to different priorities (high, medium, or low), and you can create multiple engagements for the same and/or different campaigns that display in the same zone. If multiple engagements from different campaigns target a visitor simultaneously, and the engagements are mapped to the same zone, LiveEngage will most likely display the engagement that belongs to the campaign with the highest priority. More specifically: There is a 70% chance that engagements belonging to High Priority campaigns will be displayed. There is a 20% chance that engagements belonging to Medium Priority campaigns will be displayed. There is a 10% chance that engagements belonging to Low Priority campaigns will be displayed.

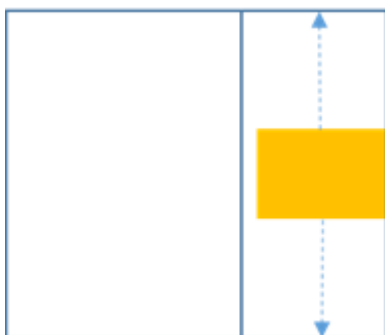
Engagement Zone

In LiveEngage, an engagement zone is a defined area on a webpage where engagements can be displayed. Each type of engagement is mapped to a specific zone. Although only one engagement can be displayed in a specific zone at any given time, multiple engagements can be displayed simultaneously in different zones. Every 10 seconds LiveEngage checks whether there is an engagement to display, and whether the zone the engagement is mapped to is available (in other words, no other engagements are currently displayed in that zone).

Engagement types and their zones:

Left Zone	Engagement Types
	<ul style="list-style-type: none"> • Slide-out engagements • Sticky engagements <p>Only one of these can be displayed simultaneously in this zone.</p>

Right Zone

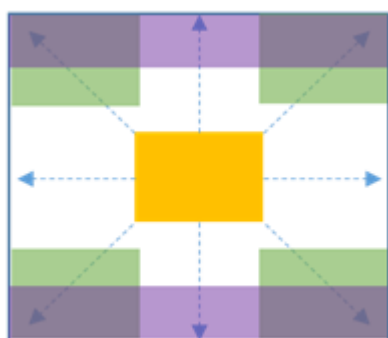


Engagement Types

- Slide-out engagements
- Sticky engagements

Only one of these can be displayed simultaneously in this zone.

Proactive Zone



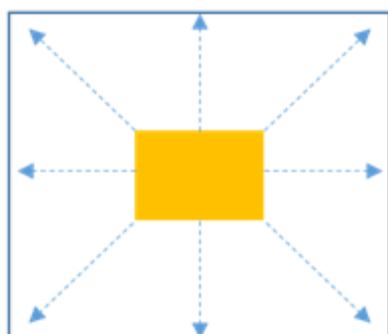
Engagement Types

Proactive engagements:

- Overlay banners
- Toaster banners
- Peeling corner banners

Only one Proactive engagement can be displayed at any given time.

Embedded Zone



Engagement Types

- Embedded buttons (created with <div> tags)

You can display an unlimited number of embedded buttons on a page, as long as each <div> tag has a unique id.

Note: Engagements from different zones can be simultaneously displayed. You must therefore ensure that engagements do not overlap or hide one another. For example, you can have an overlay banner on the left side of the page (proactive zone) that hides a sticky banner that is also configured on the left side of the page (Left Zone).

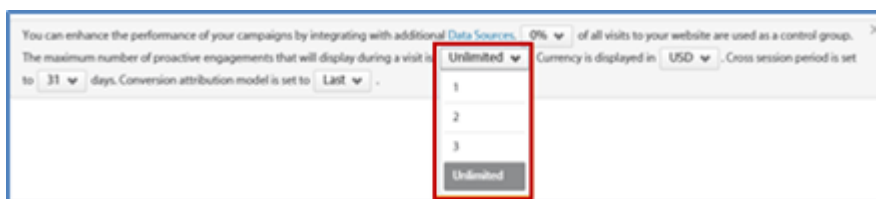
Engagement Channels and Agent Status

When more than one engagement qualifies to display in the same zone at the same time, LiveEngage generally displays an online chat engagement. If agents are not available, LiveEngage generally displays a content engagement. If no content engagements are configured, LiveEngage displays an offline chat engagement.

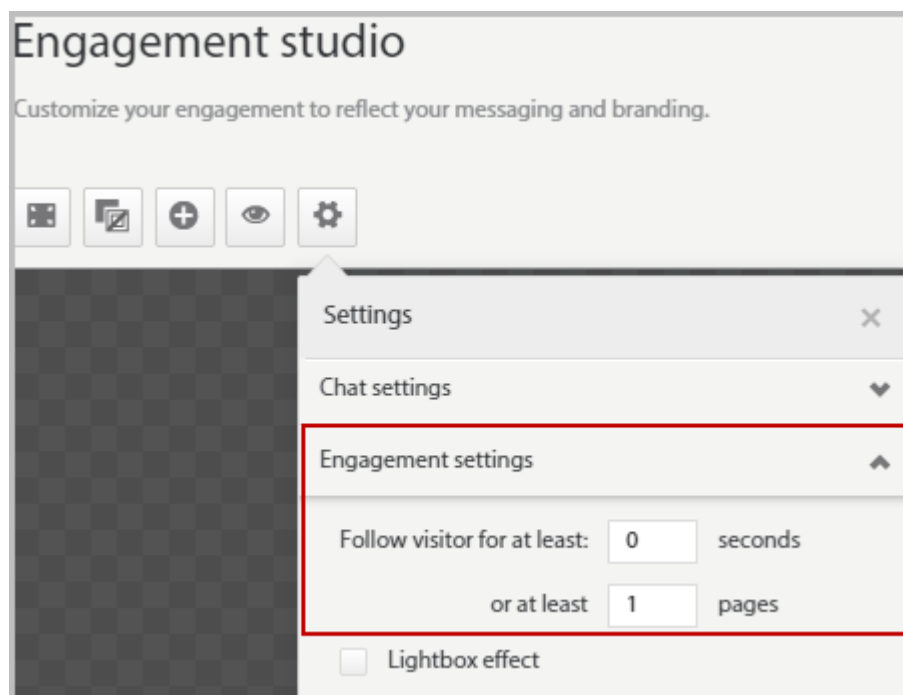
Additional Rules

To provide a rich, yet non-intrusive engagement experience, LiveEngage employs the following rules per visitor session:

- Once an engagement is displayed, LiveEngage will not display other engagements in the same zone until the visitor navigates to a different page.
- If an online chat button is displayed, and then 10 seconds later there are no longer any available agents, LiveEngage will not replace the button with an offline button.
- When two or more engagements are mapped to the same zone, whether they belong to the same campaign or to different campaigns of the same priority, LiveEngage will only display one of the engagements, at random.
- Every 10 seconds LiveEngage checks visitor attributes (target audience, location, and behavior), and displays the appropriate engagement. A visitor may therefore see one engagement when landing on a specific page (due to location-based targeting), and 10 seconds later the visitor may see a different engagement on the same page (due to behavior-based targeting).
- If a visitor closes an engagement, it will no longer be displayed in the current session.
- LiveEngage allows you to limit the number of times a proactive engagement is displayed per visitor session. When the limit is reached, no other proactive engagements will be displayed in the session, regardless of engagement priorities.



- You can configure an engagement to “follow” a visitor for a certain amount of time or for a specific number of pages. These engagements will always be displayed rather than other engagements mapped to the same zone.



Use Cases

Using multiple engagements in campaigns helps you facilitate your visitors' journeys and achieve your business goals. Here are some examples of how multiple campaigns and engagements can be used:

- **Use one campaign to target all visitors and specific visitors.** Create an embedded chat button engagement in the campaign for general enquiries. Set this engagement to display to all visitors on every page of your website. In the same campaign, create an overlay chat engagement that displays to visitors who remain on a specific page for a certain amount of time.
- **Redirect visitors from chat to content.** You can configure two toaster banners, one for chat and one for content, and set both banners to target the same audience, location, and behavior. When agents are available, the chat engagement will be displayed, and when no agents are available, the content engagement will be displayed.
- **A/B testing.** You can configure two different engagements, mapped to the same zone, each belonging to a different campaign (for example, a Sticky Chat button on the top left and a Slide-out Chat button on the bottom left). LiveEngage will randomly display one of the engagements in each visitor session. Looking at the campaign reports you will be able to tell which of the two engagements drove better results.

4.12 Predefined Content

Predefined Content is a set of predetermined responses to frequently asked questions. It is an excellent way to help your agents handle multiple chats in an error-free, clear, competent and efficient manner, with a consistent company voice, by providing them with the responses that are most commonly used in your business. Your agents can access these responses while they are chatting and, rather than retyping repeatedly, they can select the relevant, ready-made response.

4.12.1 Creating Predefined Content

When you first open LiveEngage, you'll find ready-made, predefined content in the predefined content library, which is accessed through the Campaign screen. You can use and edit the predefined content, or you can add your own, relevant content, according to your business needs.

To add a new item to your Predefined Content library:

1. Open the Campaigns area.

Campaigns
Manage and create campaigns, see how they perform, and optimize their performance. Action ▾

PRIORITY	STATUS	NAME	TIME FRAME	GOAL TYPE	ENGAGEMENTS	GOAL ACHIEVED
<input type="checkbox"/>		Live Chat on your site	6 Dec. 2014 ▶ No end date	Increase page views	—	—
<input type="checkbox"/>		Sample campaign	1 Oct. 2015 ▶ 31 Dec. 2015	Increase page views	—	—

⋮ + Add campaign

You can enhance the performance of your campaigns by integrating with additional [Data Sources](#). 5% ▾ of all visits to your website are used as a control group. The maximum number of proactive engagements that will display during a visit is: Unlimited ▾. Currency is displayed in GBP ▾. Cross session period is set to 31 ▾ days. Conversion attribution model is set to Last ▾. Improve agent efficiency by creating [Predefined Content](#).

2. In the Campaigns footnote, click **Predefined Content**. The Predefined Content library is displayed.

LIVEENGAGE USER GUIDE FOR CAMPAIGN MANAGERS

Predefined Content library

Add and edit Predefined Content to improve agent efficiency when corresponding with visitors. [Learn more](#)

	STATUS	NAME	CATEGORIES	LANGUAGES	HOT KEYS	Action
<input type="checkbox"/>	Active	Thanks for waiting	Conversational	AR-AE EN-US		
<input type="checkbox"/>	Active	Permission based service	Privacy	AR-AE EN-US		
<input type="checkbox"/>	Active	No contact - Still there?	Closing	AR-AE EN-US		
<input type="checkbox"/>	Active	Abusive - Final Warning	Abuse	AR-AE EN-US		
<input type="checkbox"/>	Active	Transfer to Manager	Transfer	AR-AE EN-US		
<input type="checkbox"/>	Active	Chat again	Closing	AR-AE EN-US		
<input type="checkbox"/>	Active	Question	Conversational	AR-AE EN-US		
<input type="checkbox"/>	Active	Good-bye	Closing	AR-AE EN-US		
<input type="checkbox"/>	Active	Answered all questions today?	Closing	AR-AE EN-US		
<input type="checkbox"/>	Active	Delay	Conversational	AR-AE EN-US		
<input type="checkbox"/>	Active	One moment please	Conversational	AR-AE EN-US		
<input type="checkbox"/>	Active	Introduction	Greeting	AR-AE EN-US		
<input type="checkbox"/>	Active	Transfer to alternate chat group	Transfer	AR-AE EN-US		
<input type="checkbox"/>	Active	Happy to help	Conversational	AR-AE EN-US		
<input type="checkbox"/>	Active	Help	Greeting	AR-AE EN-US		

3. Click Add content. The Add new predefined response screen is displayed.

Add new predefined response

Add multi-language predefined responses to your content library

You can add translated texts or HTML in the following languages:

German Arabic English (US) +

Title:

Text:

Preview:

Alex at 9:16:21

4. Select the language of your predefined response. If the language is not displayed, click to add a new language (+).
5. Enter the title and text for the predefined response. You can also add dynamic text to your predefined response, including skill name, skill description, agent name, agent nickname and agent email.
6. Select the category for the predefined response. This will affect the category where the response is displayed in the Agent Workspace.
7. Select the Hot Key combination that agents can use to send the predefined response during a conversation with a consumer.
8. Ensure that the predefined response is set to active (🟢).
9. Click **Save**, or click **Save & add another** if you want to add additional items. The predefined response is now displayed in the Predefined Content library.

LIVEENGAGE USER GUIDE FOR CAMPAIGN MANAGERS

To edit an existing predefined content response:

1. Open the Campaigns area.

The screenshot shows the 'Campaigns' section of the LiveEngage interface. At the top, there's a header 'Campaigns' with a subtitle 'Manage and create campaigns, see how they perform, and optimize their performance.' and an 'Action' dropdown. Below this is a table with columns: PRIORITY, STATUS, NAME, TIME FRAME, GOAL TYPE, ENGAGEMENTS, and GOAL ACHIEVED. Two campaigns are listed: 'Live Chat on your site' and 'Sample campaign'. Below the table, there's a notification box with performance tips. At the bottom, there's a '+ Add campaign' button.

PRIORITY	STATUS	NAME	TIME FRAME	GOAL TYPE	ENGAGEMENTS	GOAL ACHIEVED
<input type="checkbox"/>	H	Live Chat on your site	6 Dec. 2014 ▶ No end date	Increase page views	—	—
<input type="checkbox"/>	M	Sample campaign	1 Oct. 2015 ▶ 31 Dec. 2015	Increase page views	—	—

2. In the Campaigns footnote, click **Predefined Content**. The Predefined Content library is displayed.

The screenshot shows the 'Predefined Content library' modal. It has a header 'Predefined Content library' with a subtitle 'Add and edit Predefined Content to improve agent efficiency when corresponding with visitors.' and a 'Learn more' link. Below this is a table with columns: STATUS, NAME, CATEGORIES, LANGUAGES, and HOT KEYS. The table lists 15 predefined content items, each with a checkbox, a name, a category, and language options (AR-AE, EN-US). At the bottom, there's an 'Add content' button and a 'Done' button.

STATUS	NAME	CATEGORIES	LANGUAGES	HOT KEYS
<input type="checkbox"/>	Active	Thanks for waiting	Conversational	AR-AE EN-US
<input type="checkbox"/>	Active	Permission based service	Privacy	AR-AE EN-US
<input type="checkbox"/>	Active	No contact - Still there?	Closing	AR-AE EN-US
<input type="checkbox"/>	Active	Abusive - Final Warning	Abuse	AR-AE EN-US
<input type="checkbox"/>	Active	Transfer to Manager	Transfer	AR-AE EN-US
<input type="checkbox"/>	Active	Chat again	Closing	AR-AE EN-US
<input type="checkbox"/>	Active	Question	Conversational	AR-AE EN-US
<input type="checkbox"/>	Active	Good-bye	Closing	AR-AE EN-US
<input type="checkbox"/>	Active	Answered all questions today?	Closing	AR-AE EN-US
<input type="checkbox"/>	Active	Delay	Conversational	AR-AE EN-US
<input type="checkbox"/>	Active	One moment please	Conversational	AR-AE EN-US
<input type="checkbox"/>	Active	Introduction	Greeting	AR-AE EN-US
<input type="checkbox"/>	Active	Transfer to alternate chat group	Transfer	AR-AE EN-US
<input type="checkbox"/>	Active	Happy to help	Conversational	AR-AE EN-US
<input type="checkbox"/>	Active	Help	Greeting	AR-AE EN-US

3. Click on the predefined response that you want to edit. The Manage predefined content screen is displayed.

4. Edit the predefined response as required, and then click **Save**. The updated predefined response is now displayed in the Predefined Content library.

4.12.2 Importing Predefined Content

Importing Predefined Content saves you time and energy, providing an easy and efficient way to add or edit content. It is especially useful if you want to add content from another management system or if you want to make multiple changes to your existing content, such as adding translations to multiple items. Instead of having to add or edit Predefined Content items one at-a-time, we extract data from your CSV (Comma Separated Values) file and turn it into Predefined Content in your account.

To import Predefined Content:

1. In the Engagement studio, click the Settings menu (⚙️).

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2. Click **Customize Predefined Content**. The Predefined Content library is displayed.

Predefined Content library

Add and edit Predefined Content to improve agent efficiency when corresponding with visitors. [Learn more](#)

Action ▾

	STATUS	NAME	CATEGORIES	LANGUAGES	HOT KEYS
<input type="checkbox"/>	Active	Thanks for waiting	Conversational	AR-AE EN-US	
<input type="checkbox"/>	Active	Permission based service	Privacy	AR-AE EN-US	
<input type="checkbox"/>	Active	No contact - Still there?	Closing	AR-AE EN-US	
<input type="checkbox"/>	Active	Abusive - Final Warning	Abuse	AR-AE EN-US	
<input type="checkbox"/>	Active	Transfer to Manager	Transfer	AR-AE EN-US	
<input type="checkbox"/>	Active	Chat again	Closing	AR-AE EN-US	
<input type="checkbox"/>	Active	Question	Conversational	AR-AE EN-US	
<input type="checkbox"/>	Active	Good-bye	Closing	AR-AE EN-US	
<input type="checkbox"/>	Active	Answered all questions today?	Closing	AR-AE EN-US	
<input type="checkbox"/>	Active	Delay	Conversational	AR-AE EN-US	
<input type="checkbox"/>	Active	One moment please	Conversational	AR-AE EN-US	
<input type="checkbox"/>	Active	Introduction	Greeting	AR-AE EN-US	
<input type="checkbox"/>	Active	Transfer to alternate chat group	Transfer	AR-AE EN-US	
<input type="checkbox"/>	Active	Happy to help	Conversational	AR-AE EN-US	
<input type="checkbox"/>	Active	Help	Greeting	AR-AE EN-US	

Add content

Done

3. Click the Action menu, and then select **Import**. The Import Content page is displayed.

Import Content

Import your Predefined Content from an external file. This makes editing simpler in all supported languages. [Learn more](#)

Note that all the existing items will be replaced by the new imported items.

- 1 You can download an empty template [here](#), or your current content, [here](#).
- 2 Select a file to upload (supported file type is CSV).
A backup file with current items will be automatically downloaded.

Choose File... No file chosen

Cancel Import

You can now do one of the following:

- Create new content by downloading an empty CSV template.
- Edit/add to your current Predefined Content by selecting a CSV file with your current content.

4. Save the CSV file on your computer.
5. Edit or add your own content and translations to the CSV file.

Tip: We recommend you use Google Spreadsheets, Numbers, or OpenOffice for this purpose.

6. Return to the Import Content page, and click **Choose File**.
7. Locate your CSV file, and then click the **Open** button.
8. Click **Import**. If your CSV file is successfully uploaded, a notification is displayed and the updated content is now displayed in the Predefined Content list.

Notes:

- i. *The import process overwrites any existing content on your account (except for categories). The Restore to default option is not available after import.*
- ii. *A CSV file with your current items is automatically downloaded as a backup.*

Predefined Content CSV file format

The first line of your CSV must include the field headers described below, in the same order, with each separated by a comma. Subsequent lines in the file should contain data for your content using those same fields in that exact same order.

- **Item ID:** The Predefined Content identifier. If you have different translations for the same predefined content, it will be presented in different lines with the same Item ID.
- **Language:** A language into which the Predefined Content is translated. The expected value is a language code, for example: en-UK for British English.
- **Title:** The Predefined Content name/title. This string is limited to 75 characters.
- **Text:** The Predefined Content in the language noted in the “Language” field. This string is limited to 8000 characters.
- **Status:** The predefined status indicates whether the Predefined Content is available for use. The expected values are:
 - Active
 - Inactive
- **Categories** (an optional value): A categorization of the Predefined Content, for example, all welcome messages will be grouped under the “Greetings” category. This field can contain multiple categories separated by commas.
- **Hot Key Letter** (an optional value): A letter (a-z) that, combined with the Hot Key Number, is a shortcut to the Predefined Content.
- **Hot Key Number** (an optional value): A number (0-9) that, combined with the Hot Key Letter, is a shortcut to the Predefined Content.

Note: If you have different translations for the same Predefined Content, you must use one line per language. Besides the “Language” and “Title” and “Text”, all values should be the same.

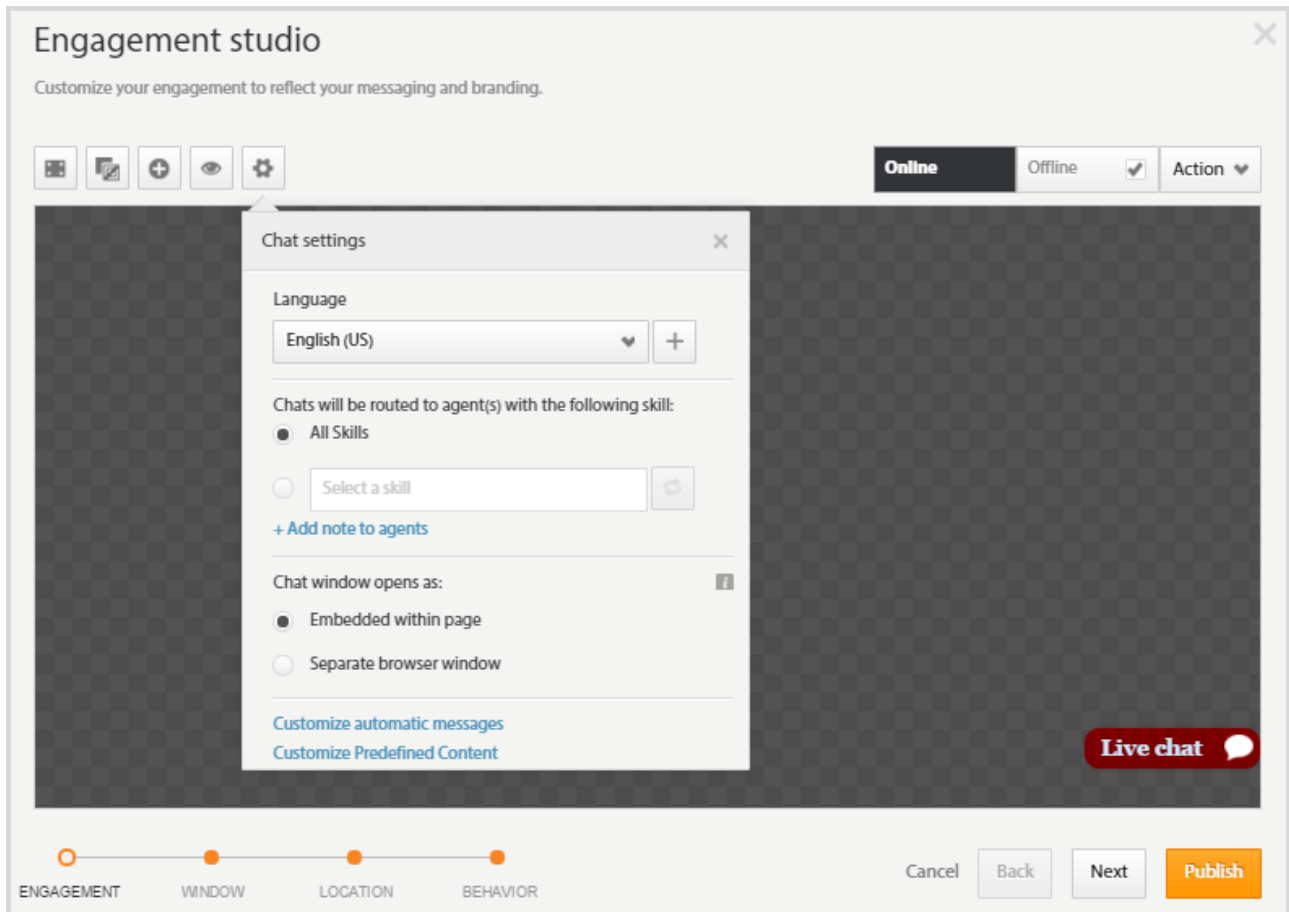
4.13 Automatic Messages

Automatic messages are messages that are displayed automatically in the embedded engagement window during a conversation between a consumer and an agent. The messages provide feedback on the status of the conversation, for example, when the window opens, when an agent accepts the chat, and when the consumer is transferred to another agent.

Automatic messages can be customized to match your branding.

To customize automatic messages:

1. In the Engagement studio, click the Settings menu (⚙️).



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2. Click **Customize automatic messages**. The Automatic Message library is displayed.

Automatic message library

Edit automatic messages generated by the system. These messages enhance the visitor experience by providing contextual information.

	STATUS	NAME	LANGUAGES	
<input type="checkbox"/>	Active	Engagement transferred to a different agent	AR-AE EN-US +1	
<input type="checkbox"/>	Active	Engagement disconnected	AR-AE EN-US +1	
<input type="checkbox"/>	Active	Chat engagement not in progress	AR-AE EN-US +1	
<input type="checkbox"/>	Active	System name (for automatic messages)	AR-AE EN-US +1	
<input type="checkbox"/>	Active	Chat transcript requested by visitor	AR-AE EN-US +1	
<input type="checkbox"/>	Active	Engagement re-queued by system	AR-AE EN-US +1	
<input type="checkbox"/>	Active	Engagement transferred to a different skill	AR-AE EN-US +1	
<input type="checkbox"/>	Active	Agent accepts the engagement	AR-AE EN-US +1	
<input type="checkbox"/>	Active	Non-responsive Final Warning	AR-AE EN-US +1	
<input type="checkbox"/>	Active	On-hold message #2	AR-AE EN-US +1	
<input type="checkbox"/>	Active	Chat agents currently unavailable	AR-AE EN-US +1	
<input type="checkbox"/>	Active	Waiting for an available agent	AR-AE EN-US +1	
<input type="checkbox"/>	Active	On-hold message #1	AR-AE EN-US +1	
<input type="checkbox"/>	Active	Engagement transferred due to agent disconnection	AR-AE EN-US +1	

Done

3. Select the automatic message you want to edit.

Edit automatic message

Add translated automatic messages to your content library.

The following automatic message will be sent to the visitor when: **Engagement transferred to a different agent**

You can add translated texts or HTML in the following languages:

German | Arabic | English (US) | +

Text:

Bitte warten Sie, während Ihr Chat an (name) übertragen wird.

Add dynamic text

Preview:

Info at 9:16:05

Bitte warten Sie, während Ihr Chat an (name) übertragen wird.

Item 1 of 18

Cancel Save

4. Select the target language, and then edit the automatic message as required. Click **Save**, and then click **Done** to finish. The updated automatic message is now displayed in the Automatic message library.

5 LiveEngage Data Sources

LiveEngage Data Sources enables Administrators and Campaign Managers to collect information from multiple sources. This information can then be used to customize the visitors' experience and design engagements to get the best business results.

This chapter provides information about the three categories of LiveEngage Data Sources:

1. Connectors
2. Engagement Attributes
3. Other sources

Connectors

- **LiveEngage Monitoring:** Enables you to track, monitor, and engage your website visitors.
- **Google Analytics:** Enables you to extract data from web analysis resources, in order to enhance targeting capabilities.

Engagement Attributes

- **eCommerce Info:** These attributes allow you to track the eCommerce activities of your visitors.
 - **Cart Update:** Use the Cart Update attributes to get the status of the visitor's shopping cart before they make a purchase. The status includes the products within the cart, and its total monetary value.
 - **Transaction:** The details of any exchange of money for goods or services, including the products themselves and their details.
 - **Viewed Product:** Use viewed product attributes to learn more about products that interest your visitor. Discover which products were viewed, their name, category, price, and SKU.
- **Visitor Information:** Retrieve specific details about your website visitors, for example, the channel they arrived from and the affiliate they are associated with.
 - **Customer info:** Collect data about your registered visitors: Customer type and lifecycle status.
 - **Marketing source:** Get more details about the marketing source of your visitors. See which channel or campaign brought visitors to your site and identify which affiliates they are associated with.
 - **Personal info:** Collect personal information about visitors. You can pass login information from cookies or from questions you ask in your forms.
- **Visitor journey:** Collect details about key actions that visitors take along their journey, and customize their experience accordingly. This includes the leads they generated, errors they experience, and more.
 - **Lead:** Use this information to report on the estimated value of your leads.
 - **Service activity:** Use this information to measure service activities and success.
 - **Visitor error:** Receive information about errors that visitors experience when they browse the site and fill out forms.
 - **Section:** Use sections to determine the appropriate location for engaging with visitors, or to display where those visitors are browsing.

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Other Data Sources

- **Interactive Voice Response Deflection:** Integrate your IVR system with LiveEngage to deflect calls to chat.

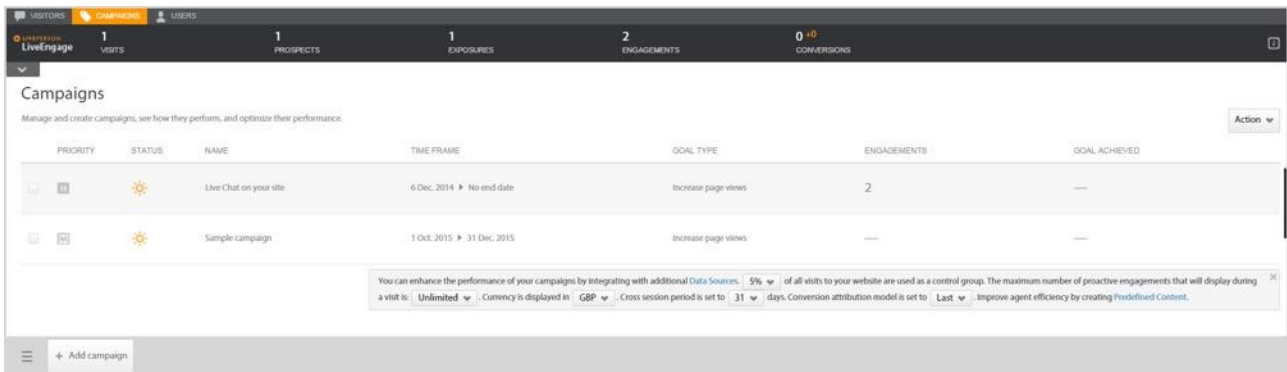
5.1 Connecting to Google Analytics

LiveEngage allows you to connect to your Google Analytics account from within the platform. This helps you improve your targeting. With Google Analytics data, you can use LiveEngage campaigns to engage with your visitors, for example, just before they abandon your site.

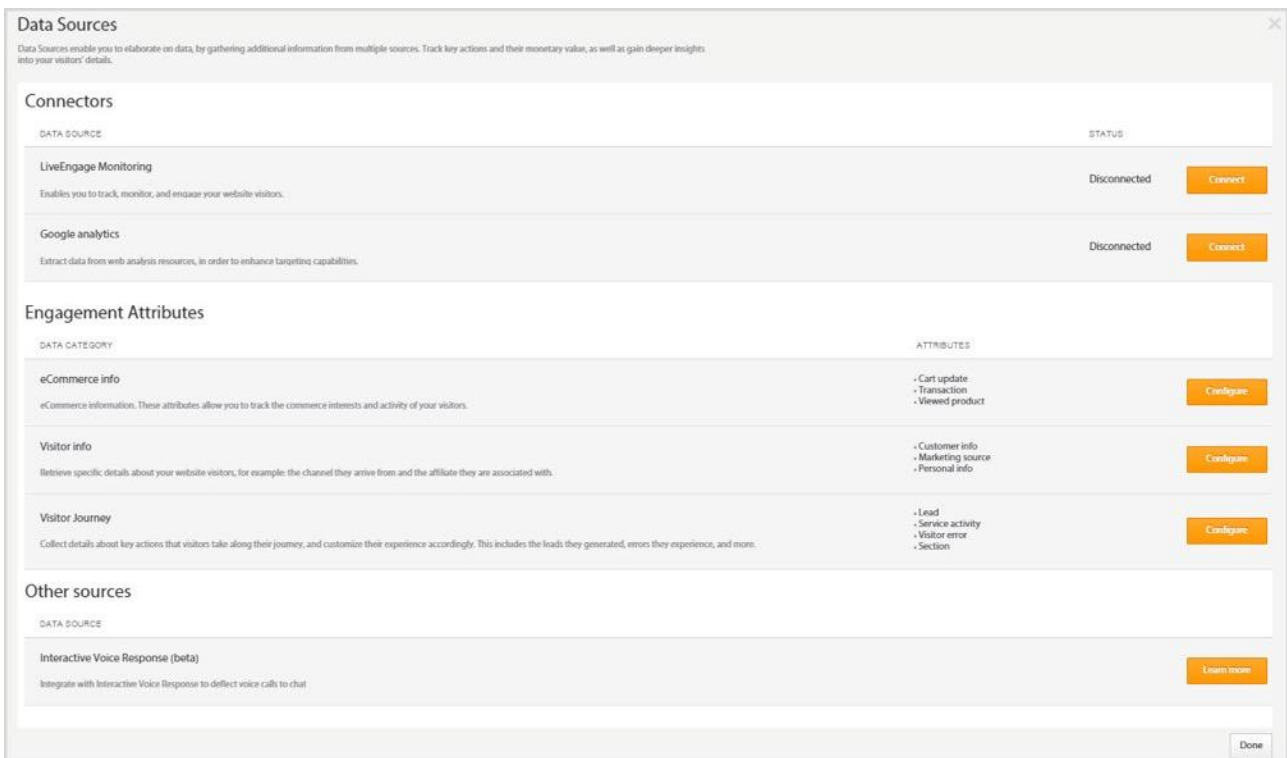
LiveEngage can also connect to your Google AdWords data (if it is linked to your analytics account), and allow you to create campaigns that match the searches that led visitors to your website using the Google ValueTrack.

To connect your Google Analytics account:

1. Log into your relevant Google account.
2. In LiveEngage, navigate to the Campaigns page.



3. In the footnote, click **Data Sources**. The Data Sources page is displayed.



4. In the Google analytics row, click **Connect**. LiveEngage will request permission to access your Google account. Once you have accepted, you will receive a confirmation message, and Web Analytics will be marked as Connected.

5.2 Engagement Attributes

Engagement Attributes allows you to extract more detailed information from your webpages and continue to track it, ensuring that you don't miss opportunities to engage with your high-value visitors. In LiveEngage, basic visitor information is already displayed out-of-the-box. Engagement Attributes allow you to dig deeper into your available customer information to discover their needs.

5.2.1 Extracting Data with No Coding

LiveEngage can extract information about certain attributes that exist on your webpages, such as cart total, marketing channel source, transaction order ID, and lead details. We call these Engagement Attributes, and they can be used to improve customer satisfaction, to customize your engagement experience, and to generate reports.

To Extract Data with no coding:

1. Decide which attributes you want to extract.
2. Find the element that holds the data in your webpage source. LiveEngage can collect data from HTML element class, ID or JavaScript global variable.
3. Access the Engagement Attributes through Data Sources.
4. Map the relevant attribute and its properties according to how you want to extract the data. Do this by copying the identifier into the field.
5. Click **Save**. You'll see a success message validating your configuration.

Repeat these steps for each attribute you want to configure and extract. Once you have configured your website for an attribute, LiveEngage will search for it in every page of your website and extract it.

Tips:

- i. LiveEngage will "trim" any non-numeric characters such as dollar signs for properties that represent numbers, for example, "total".
- ii. Make sure that the identifier class name or ID is unique. LiveEngage will look for your identifier on all of your pages.

5.2.2 Embedding Engagement Attribute Code

LiveEngage out-of-the-box functionality provides you with relevant, yet basic information about your visitors, such as the geolocation that the visitor is browsing from, time on page, pages viewed, and more. Use Engagement Attributes to collect even more data, for example, transactions, customer information and shopping cart updates, in order to tailor the visitor experience.

To Embed Engagement Attribute Code:

1. Insert the Engagement Attribute declaration in a script tag, either at the end of the LiveEngage tag script, or in a separate script tag just afterwards.
2. Insert the push function below the declaration and add the type of engagement attribute, such as "cart" (see additional example below).

Notes:

- i. The push method expects a JSON format.
- ii. The JSON structure is unique to each Engagement Attribute. The appropriate format for each Engagement Attribute can be found in the Data Sources page.

3. Validate the code by going to the visitor page and simulating the visitor actions that trigger an event.

Notes:

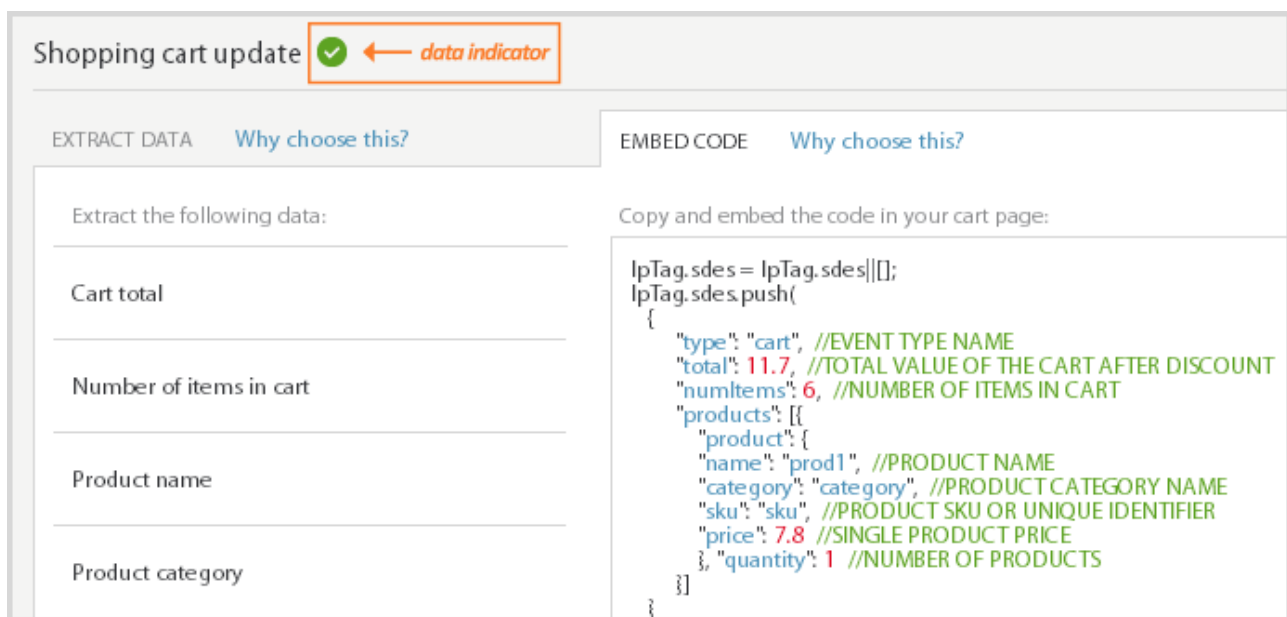
- i. The 'type' property is mandatory and tells us which engagement attribute you are using. Other attributes are optional.
- ii. When LiveEngage gets a list, the system never calculates totals or numbers of items. LiveEngage relies on the event to send that information.



5.2.3 Validating the Engagement Attributes values

The implementation of the Engagement Attributes values can be verified via the LiveEngage interface (after an hour), or directly from your website.

Validation via LiveEngage interface

Verify that the data indicator for the "shopping cart update" is green:



Shopping cart update   data indicator

EXTRACT DATA Why choose this?

Extract the following data:

- Cart total
- Number of items in cart
- Product name
- Product category

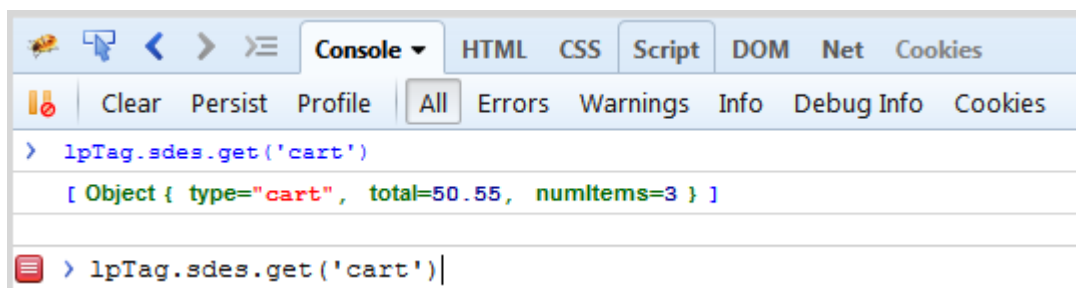
EMBED CODE Why choose this?

Copy and embed the code in your cart page:

```
lpTag.sdes = lpTag.sdes||[];
lpTag.sdes.push(
{
  "type": "cart", //EVENT TYPE NAME
  "total": 11.7, //TOTAL VALUE OF THE CART AFTER DISCOUNT
  "numItems": 6, //NUMBER OF ITEMS IN CART
  "products": [{
    "product": {
      "name": "prod1", //PRODUCT NAME
      "category": "category", //PRODUCT CATEGORY NAME
      "sku": "sku", //PRODUCT SKU OR UNIQUE IDENTIFIER
      "price": 7.8 //SINGLE PRODUCT PRICE
    }, "quantity": 1 //NUMBER OF PRODUCTS
  }
}]
}
```

Validation directly from the website

1. Add an item to the cart on your site.
2. Using Firefox or Chrome, open the dev tools (press F12) and type:
`lpTag.sdes.get('cart');`



```
> lpTag.sdes.get('cart')
[ Object { type="cart", total=50.55, numItems=3 } ]
> lpTag.sdes.get('cart')
```

3. Verify that the values are correct.

5.2.4 Map Your Site Categories Using Code (Sections)

When you have finished creating an engagement for one of the categories on your website, for example, cameras, you will want the engagement to display on all the pages in the camera category. You can use the location-based URL, however, in some cases it is better to add a tag to your page code called a Section that adds the category name (camera, in our example) to the page. Any new or existing page that you tag with the camera Section will display the engagement automatically. This saves you time as you don't have to go back to LiveEngage to manually add each page's URL (as you do when using a location-based URL).

When to use Sections

Since website locations in LiveEngage are based (by default) on URLs, Sections are valuable when:

- You make frequent changes to your website and it's hard to keep track of the pages in each category.
- Your URLs are not readable. For example, the URL `www.urlexample.uk/articles/aaa/bbb.html` does not indicate the location of the visitor on your website.
- Your website URLs are not structured. For example, the URL `"www.urlexample.com/XX3000` does not indicate the XX3000 product category. By adding a Section to the page, you can identify its category.

Notes:

- Sections only work on page load, not on Single Page Application (SPA).*
- Adding Sections to your website requires adding code to the relevant webpages and should be done by a web developer.*
- Before creating an engagement for each Section on your website, you will need a list of all the Sections that exist on your site. Contact your web developer to get the list of Sections.*

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To create a Section for your engagement:

1. Navigate to the Campaigns page, and then click **Data Sources**. The Data Sources page is displayed.

The screenshot shows the 'Data Sources' configuration page. It is divided into three main sections: Connectors, Engagement Attributes, and Other sources. The 'Connectors' section lists 'LiveEngage Monitoring' and 'Google analytics', both with a 'Disconnected' status and a 'Connect' button. The 'Engagement Attributes' section lists 'eCommerce info', 'Visitor info', and 'Visitor Journey', each with a list of attributes and a 'Configure' button. The 'Other sources' section lists 'Interactive Voice Response (beta)' with a 'Learn more' button. A 'Done' button is at the bottom right.

DATA SOURCE	STATUS
LiveEngage Monitoring Enables you to track, monitor, and engage your website visitors.	Disconnected Connect
Google analytics Extract data from web analysis resources, in order to enhance targeting capabilities.	Disconnected Connect

DATA CATEGORY	ATTRIBUTES
eCommerce info eCommerce information. These attributes allow you to track the commerce interests and activity of your visitors.	<ul style="list-style-type: none">• Cart update• Transaction• Viewed product Configure
Visitor info Retrieve specific details about your website visitors, for example: the channel they arrive from and the affiliate they are associated with.	<ul style="list-style-type: none">• Customer info• Marketing source• Personal info Configure
Visitor Journey Collect details about key actions that visitors take along their journey, and customize their experience accordingly. This includes the leads they generated, errors they experience, and more.	<ul style="list-style-type: none">• Lead• Service activity• Visitor error• Section Configure

DATA SOURCE	
Interactive Voice Response (beta) Integrate with Interactive Voice Response to deflect voice calls to chat	Learn more

[Done](#)

2. Under Engagement Attributes, next to **Visitor Journey**, click **Edit**. Use the example code under Sections.
3. Paste the code on the pages where you want to display the engagement. Change the code sample **Section** names according to your category names.

The screenshot shows the 'EMBED CODE' section with a code block containing the following JavaScript code:

```
lpTag.section = [ //SET A LIST OF YOUR SITE SECTIONS  
  "electronics",  
  "user agreement faqs", //CAN BE A SECTION OR A SUB-SECTION  
];
```


4. In the Campaign, navigate to the Engagement area.

The screenshot displays the 'Engagement' section of a campaign manager interface. At the top, there are two tabs: 'Target audience' (selected) and 'Campaign time frame'. Under 'Target audience', it says 'All visitors'. Under 'Campaign time frame', it says '18 Jun. 2015 - No end date'. Below these tabs is a button labeled '+ Add engagement'. The main area is titled 'Engagement 1' and contains a list of engagement attributes: 'ENGAGEMENT' (Creative: Sticky chat banner, Routed to skill: All, Language: English (US)), 'WINDOW ENGAGEMENT' (EngagementWindow), 'LOCATION' (mortgages), and 'VISITOR BEHAVIOR' (All behaviors (recommended)). To the right of the 'Engagement 1' title is a toggle switch (checked) and an 'Action' dropdown menu. At the bottom right, there is a summary box showing '0%' of all visits in this campaign are used as a control group. At the bottom left, there is a button labeled '+ Add campaign'.

5. Click **Location**, and then click **Add new**.
6. Enter a location name (a category, for example, loans).
7. Select **Section**, and type the Section names where you want the engagement to display.

The screenshot shows a 'Define location by' dialog box. It has two radio buttons: 'URL' (unselected) and 'Section (Engagement Attribute)' (selected). To the right of the 'Section' radio button is a link that says 'Learn more about sections'. Below the radio buttons, it says 'The location contains the following sections:'. There is a text input field containing 'loans', 'student loans', and 'business loans', separated by 'or' and with a small 'x' icon next to each. At the bottom, there is a button labeled '+ Exclude location'.

8. Click **Save**.

Tip: Enhance the process of assigning locations to your engagements by tagging your pages with Sections.

5.2.5 Track your conversions over a period of time

Depending on the product or service they're interested in, consumers have different buying cycles. Some instantly purchase a product, while others take their time, engage with you, research additional websites, and only then come back to purchase. LiveEngage helps you identify which engagement made your visitor convert by using a cross session period and an attribution model.

Cross session period

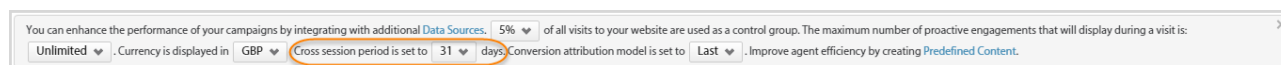
The cross session period is used to determine the window of influence in which your engagement with the visitor assisted them in completing their journey. Following the engagement, visitors may require time to decide which product or service is right for them, or they may want to involve others in the purchasing decision. When the customer returns to your site to complete their goal, if the event occurs within the window of influence (the time you deem as an appropriate period to allow the customer to reflect on your engagement), the conversion will be credited to either a campaign or agent in LiveEngage. In the case of a visitor being exposed to a content banner as well as participating in a chat, the chat will always get the credit for the conversion.

Conversions are reflected in your reports and are calculated based on the date of the interaction that caused the visitor to convert (and not when the visitor converted). The conversion period includes all the events that contributed to the conversion during a given time period. The default period is 31 days. You can define the conversion period for up to 31 days before the conversion was made (see instructions below).

- **Choose longer conversion periods** if your visitors are likely to take their time before making a decision. For example, consumers usually take more time when buying expensive products or services. In this case, set the time frame to the maximum (31 days), so you can attribute the purchase (conversion) to the chat or content that took place at the beginning of the time period.
- **Choose shorter conversion periods** if your visitors are likely to make a purchase quickly. For example, visitors are more likely to purchase flowers the same day they search for them.

To configure your account's cross-session period:

1. Navigate to the Campaigns page.
2. From the footnote, set the cross session period. This is the number of days you want to track visitors who return after a campaign exposure.

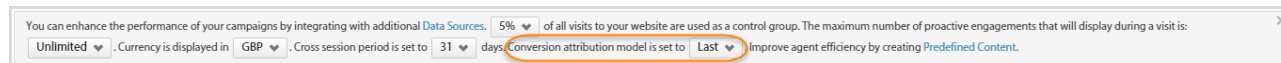


Attribution model

LiveEngage uses the attribution model, which is a set of rules that determine which agent/campaign gets the credit for the conversion. If the visitor chatted more than once, you can choose which agent gets the credit by setting the attribution model to first or last. By default, the last agent gets the credit for the conversion. Similarly, if a visitor was exposed to more than one content engagement of different campaigns, the last content engagement will get the credit for the conversion.

To configure your account's attribution model:

1. Navigate to the Campaigns page.
2. From the footnote, set the Conversion attribution model to First or Last. This determines which agent will get the credit for the conversion, or in the case of content banners, the first or last banner the visitor was exposed to.



5.3 IVR Deflection

If you have an Interactive Voice Response Deflection system, you can integrate it with LiveEngage in order to deflect calls to chat. This lowers the number of calls occupying your agents, decreases the length of your queue, and optimizes your customers' mobile experience.

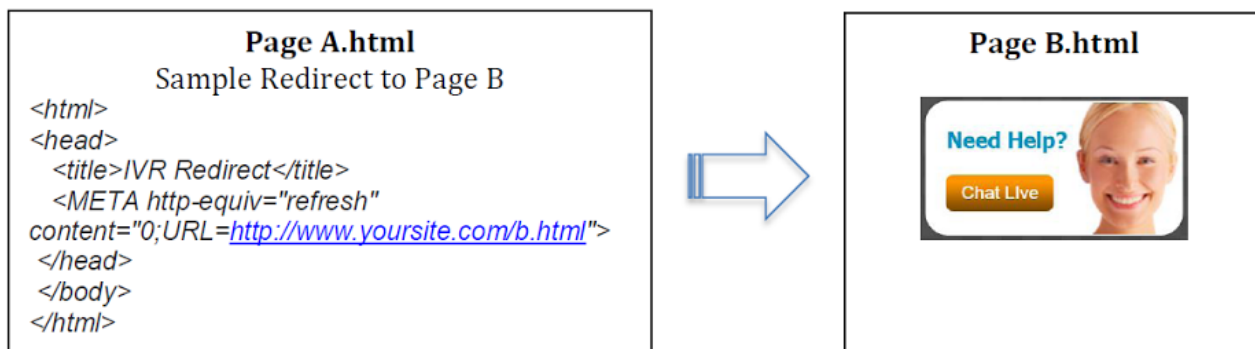
When customers call you, they are diverted by the IVR to chat via a LiveEngage campaign that is specifically designed to target callers. Customers receive a link via SMS and can click to start a chat with an agent, saving them time and increasing customer satisfaction.

LiveEngage uses a dedicated campaign on your website to target visitors who have been redirected via the IVR system. Make sure that you have created a designated landing page and set it as the engagement location.

Prerequisites for using the IVR Deflection Solution

The IVR Deflection Solution is set up exclusively on the customer side. In order to use the IVR Deflection Solution, the following prerequisites must be fulfilled by the customer:

- Creation of a dedicated landing page (Page A) that redirects visitors to a page of your website (Page B).



- Creation of a short link to paste into the VXML snippet:
 - Go to <https://bitly.com>.
 - In the input field at the top right of the page, enter the URL of your designated landing page, and click **Shorten**. Bitly creates and displays a short link to your landing page.
 - Copy the shortened link to your clipboard.
 - Paste it into the VoiceXML (VXML) below.
- Access to SMS gateway.
- Availability of an IVR programmer to complete the implementation.

Setting up the IVR Deflection Solution

To start using the IVR Deflection Solution, you are required to set up a LiveEngage Campaign that fulfils the following criteria. The campaign should fulfil the following criteria:

- Be active on the page of your website (Page B).
- Target visitors who have been redirected only from your landing page (Page A).
- Display a chat invitation.
- Define the consumer experience when agents are not available, for example, display or customize an Offline survey.

Note: LiveEngage will only target visitors who have been redirected from Page A to Page B, thereby targeting voice callers who have been diverted from your IVR system.

To learn more about IVR Deflection, including benefits, a description of how the solution works, VXML examples, and best practices for setting up, see [IVR Deflection Solution](#).

6 LiveEngage Reports

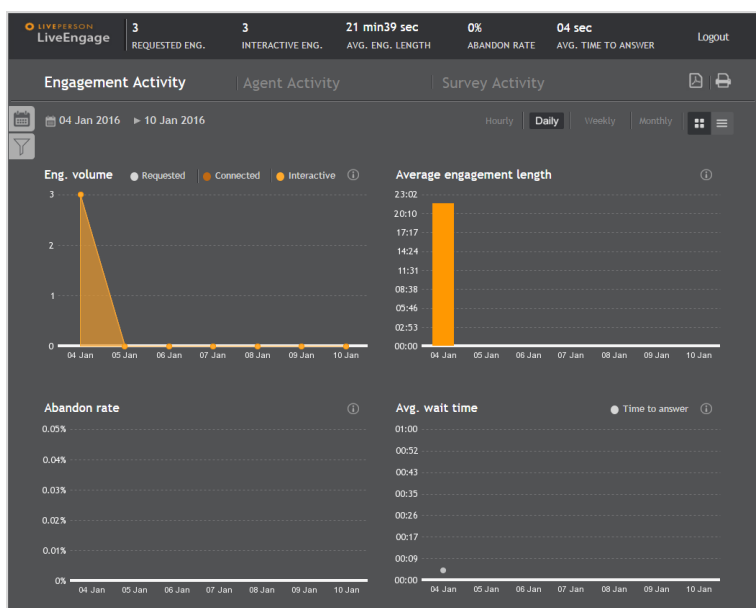
You can use LiveEngage data to optimize your contact center activities and meet performance goals. By monitoring performance spikes and/or other issues in real time, you can identify and fix problems on the fly, and even eliminate potential problems.

6.1 Survey Reports

Survey Reports allow Administrators, Agent Managers and Campaign Managers to view survey results, including overall completion rates of survey types and analysis of selected answers. Survey Reports can be an asset to both Agent Managers and Campaign Managers. You can extract data for three main survey types: Pre-Chat, Post-Chat, and Offline surveys. Another element that can be analyzed is the survey completion rate, which provides insight which helps you optimize survey forms. Moreover, the dashboards provide you with the ability to analyze survey results and view a detailed breakdown of the survey answers, per question.

To access survey reports:

1. Click on the Visitors tab, on the top left-hand corner of the screen, and then click  to open the dashboard.
2. On the left of the screen, click the data sheet () to open the Agent Manager BI dashboards. The BI dashboard is displayed.



3. Click on the Survey Activity tab.

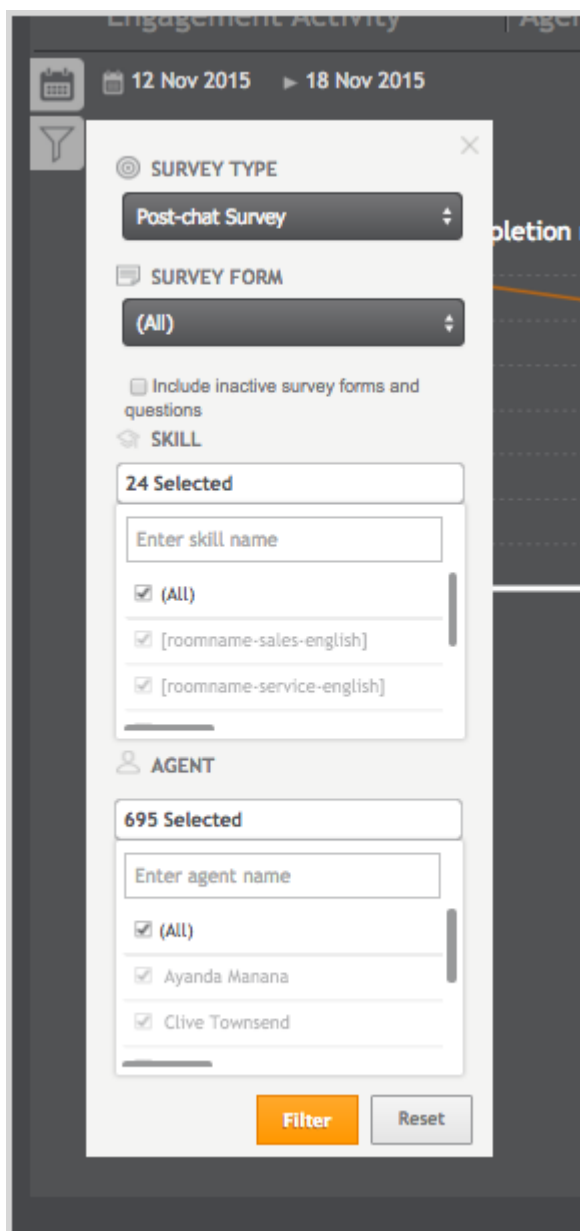
The dashboard can be filtered according to the following parameters:

- Survey - type and name
- Group
- Skill
- Agent
- Time frame

6.1.1 Filtering Capabilities

To filter the dashboard:

1. On the left of the screen, click the Filter button (). The Filter is displayed.



The screenshot shows the LiveEngage dashboard with the Filter panel open. The panel has a close button (X) in the top right corner. It contains the following sections:

- SURVEY TYPE**: A dropdown menu showing "Post-chat Survey".
- SURVEY FORM**: A dropdown menu showing "(All)".
- Include inactive survey forms and questions**: A checkbox that is currently unchecked.
- SKILL**: A section with a search bar "Enter skill name" and a list of skills: "(All)", "[roomname-sales-english]", and "[roomname-service-english]". The count "24 Selected" is displayed above the list.
- AGENT**: A section with a search bar "Enter agent name" and a list of agents: "(All)", "Ayanda Manana", and "Clive Townsend". The count "695 Selected" is displayed above the list.

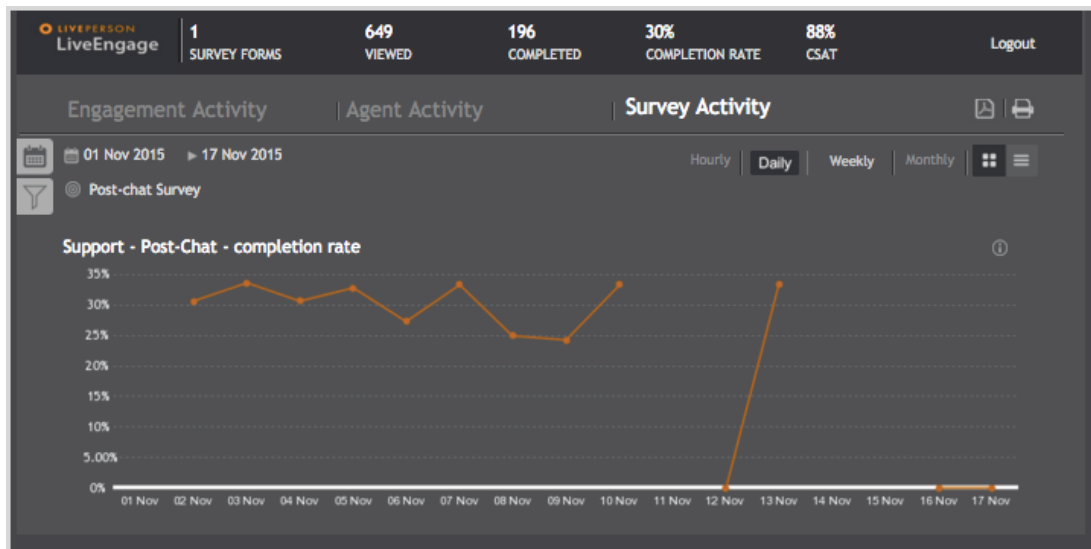
At the bottom of the panel are two buttons: "Filter" (highlighted in orange) and "Reset".

6.1.2 Viewing options

You can view the dashboard on the following different levels:

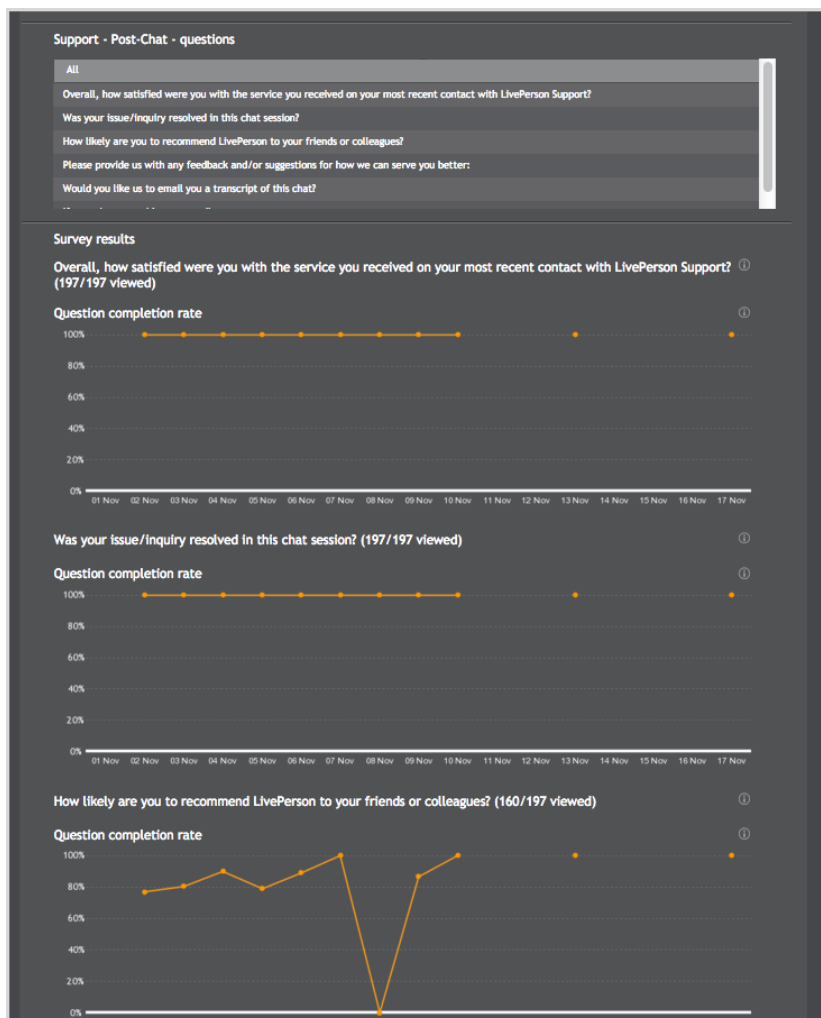
Summary of completion rate by survey for each survey type

Example: View the completion rate of each Post-Chat Survey.



Drill down to each survey

Select a specific survey and see an analysis of each question within the survey.



Drill down to survey answers - CSAT questions

Select a specific survey question - it is possible to perform an analysis of each answer.



For question types that are marked as CSAT (in post-chat surveys), the following breakdown exists:

- **Score distribution by month:** Displays the average CSAT calculated for this particular survey over time, showing daily trend.
- **Answer distribution:** Displays the distribution of answers per multiple choice question.
- **Distribution per answer:** Clicking on an answer in the 'answer distribution' widget will update this graph to display the completion rate of this question with an overlay of that particular answer rate.

Drill down to survey answers: Multiple Choice Questions

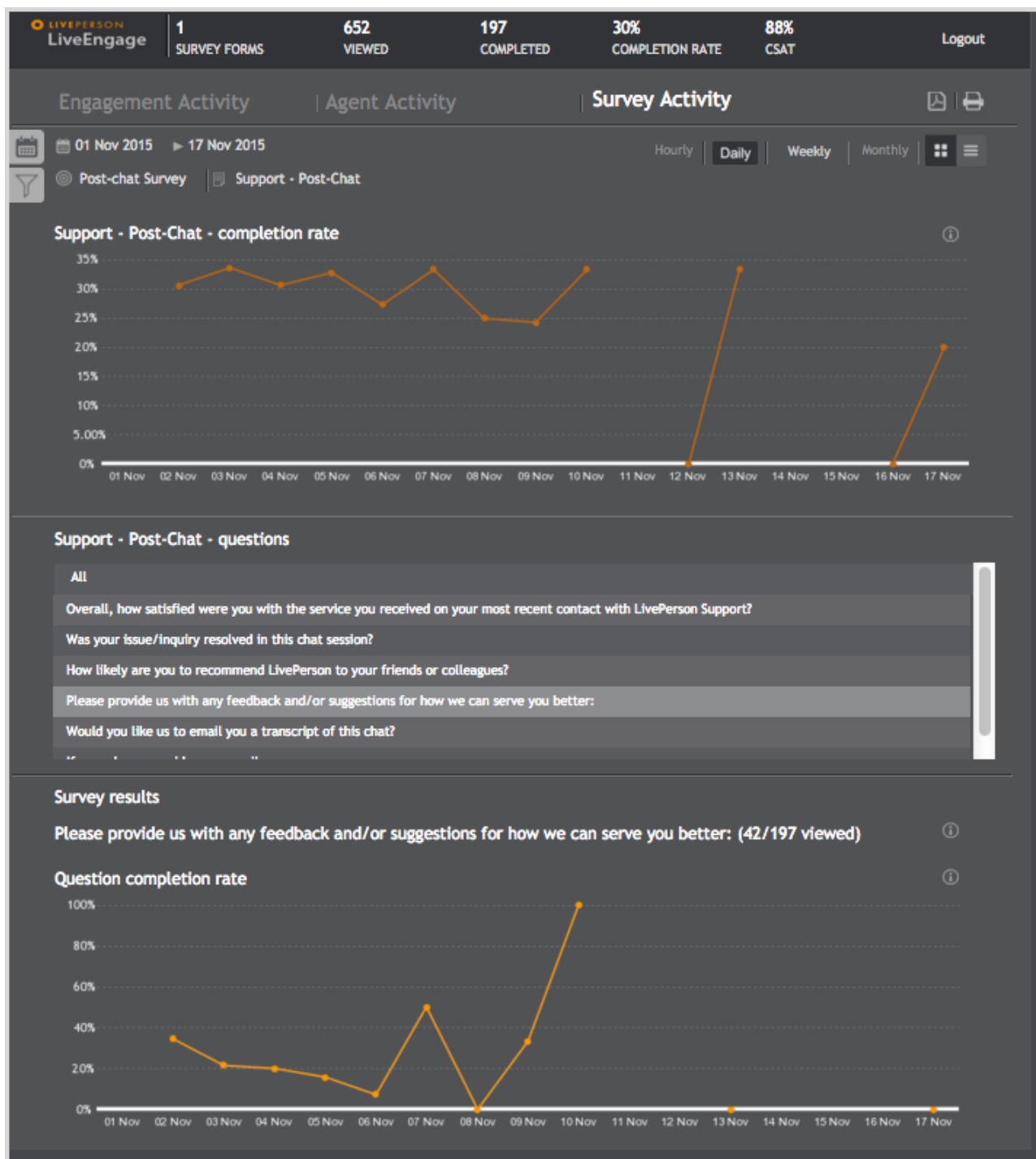


Select a specific survey question. It is possible to perform an analysis of each multiple choice question's answer.

- **Answer distribution:** Displays the distribution of answers per multiple choice question.
- **Distribution per answer:** Clicking on an answer in the 'answer distribution' widget will update this graph to display the completion rate of this question with an overlay of that particular answer rate.

Drill down to survey answers - Free text questions

See an example of a free text question. For this type of question, the completion rate of the question will be displayed. If you would like to see the free text response itself, that is available in the Engagement History area.



Note: The results displayed are for multiple choice answers, not free text.

Free text responses can be viewed in the Engagement History area.

6.1.3 Grid View

All the above analysis and additional statistics exist in grid view form as well as in our other dashboards. You can access the Grid View by clicking on the grid icon on the top right hand corner of the screen.

The screenshot displays the LiveEngage Grid View dashboard. At the top, there's a header with the LiveEngage logo, a 'Logout' button, and summary statistics: 5 SURVEY FORMS, 195 VIEWED, 33 COMPLETED, and 17% COMPLETION RATE. Below the header, there are tabs for 'Engagement Activity', 'Agent Activity', and 'Survey Activity'. The 'Survey Activity' tab is selected, showing a date range from 01 Jun 2015 to 30 Jun 2015 and filters for 'Post-chat Survey', 'TEST POST_CHAT SURVEY1', and 'GROUP1, GROUP2, G...'. The main content area is divided into two sections: 'TEST POST_CHAT SURVEY1 - questions' and 'Survey results'. The 'Survey results' section shows a table of survey data for the question 'Overall how satisfied were you with the service you received on your most recent contact with 47th Street photos?'. The table has columns for DATE, DAY OF THE WEEK, GROUP, SKILL, AGENT, COMPLETION RATE, and COMPLETED. The data shows three rows of results for the same question, all with a completion rate of 100.00%.

DATE	DAY OF THE WEEK	GROUP	SKILL	AGENT	COMPLETION RATE	COMPLETED
08 Jun	Monday	GROUP1	training	Scott	100.00%	1
10 Jun	Wednesday	GROUP1	training	Scott	100.00%	2
23 Jun	Tuesday	GROUP1	training	Scott	100.00%	2

6.2 Business Reports

LiveEngage offers three levels of data presentation:

- A data bar that displays Key Performance Indicators (KPIs).
- A dashboard with graphs that display more detailed information that can help you understand which actions to take in order to optimize your campaigns.
- Business Intelligence (BI) dashboards which provide more data, more filtering capabilities and an ability to analyze success factors and campaign effectiveness over time.

Business reports can be accessed by Administrators and Campaign Managers.

6.2.1 Campaign Data Bar

The Campaign Data Bar displays the visitor funnel: Total visitors, those exposed to data, those engaged, incremental conversions, and incremental revenue. Campaign data is displayed and updated every hour, enabling Campaign Managers to make on-the-fly decisions about their campaigns and engagements at any given time. Campaigns are tied to business goals, giving Campaign Managers the crucial information that they need to optimize their targeting.



The following data is displayed to Campaign Managers in the Campaign Data Bar:

Prospects: Represents the number of monitored visits eligible (targeted by this specific campaign) to receive at least one graphical engagement (invitation, button or content) from this specific campaign.

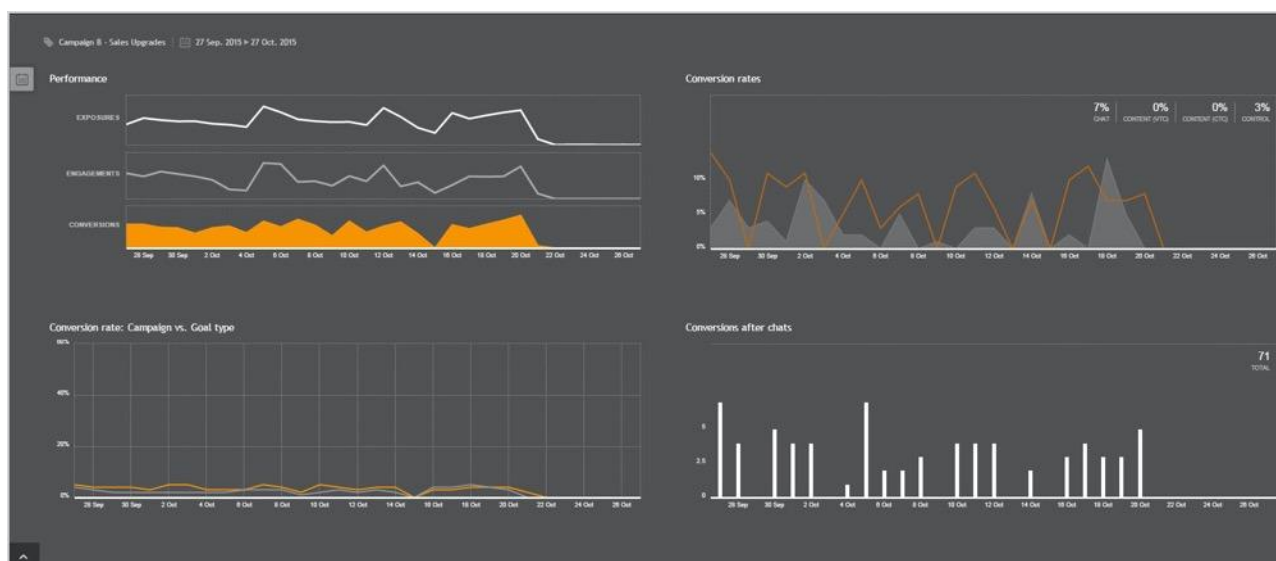
Exposures: Represents the number of graphical engagements that are displayed to the visitors from this specific campaign, for example, buttons, invitations and content.

Engagements: Represents the number of clicks on content and interactive chats.

Conversions: Represents the number of conversions generated by visitors exposed to this specific campaign (regardless of whether or not they engaged).

Goals: Categorized either as Business goals or Assisting goals. Business goals include “sell a product or service” and “generate leads”. These goals are considered Conversions when they are reached. Assisting goals include “increase page views” and “other goals” and are considered Goal Reached when they are reached.

6.2.2 Campaign Dashboard



The following data is displayed to Administrators and Campaign Managers in the Campaign Dashboard:

Performance

This widget displays the comparison between exposures, engagements and goals reached over time. Expect to see goals reached / conversions (depends on the goal type of the campaign) trending with a similar slope to those of the exposures and engagements.

Goal reached / Conversion Rates (Depending on the goal type of the campaign)

Conversion rates of the different channels:

- Chat goal reached / conversion rate: Goal reached / conversion rate after interactive chat.
- Content goal reached / conversion rate: Goal reached / conversion rate after content exposures.
- Control group: Goal reached / conversion rate of the control group.

This widget compares the trend of goal reached / conversion rates of chats, view-through goal reached / conversion rates for content, and click-through goal reached / conversion rates for content, over time. Here you can see which channel is giving you the best goal reached / conversion rates. Since costs of channels differ, you want to make sure that you are using the most cost-effective channel in your campaigns. Here you can also see the effectiveness of the channels that are used by comparing the chat and content goal reached / conversion rates to those of the control group.

Conversion/Goal reached Rate: Campaign vs. Goal Type

This widget compares the trend of the conversion / goal reached rate for the selected campaign vs. the average conversion / goal reached rate of all the campaigns of the same goal type. Expect to see the trend of your campaign (the orange line) above the grey average line. If the trend of your campaign is below the average, you should probably adjust the campaign.

Conversions/Goal reached after Chats or Content click

This widget displays the total number of conversions / goals reached that were achieved following interactive chats or content clicks, over time (depending on what channels the campaign offers).

Campaign Contribution to Goals:

This widget provides additional information; it displays the number of times that different goals were reached as a result of the visitors' exposure to graphical engagements that belonged to this particular campaign, as a side effect. The small, white ring at the left represents the current campaign.

The orange circle is the goal of the current campaign. The other circles represent other goals and the relative effect that this campaign had on them. Circles that are lighter in color, smaller and further away were less affected by the current campaign than those that are darker, closer and larger to the campaign at the left.

Revenues after Chats or content click (depending on what the campaign is offering)

This widget displays the total number of revenues that were generated following interactive chats or content clicks, over time. Revenue is displayed only for campaigns with Sales goal.

Average Order Value (AOV)

Here, compare the AOV of visitors who were exposed to this campaign to those who were in the control group and not exposed to this campaign. If the AOV of exposed visitors is higher than that of the control group visitors, then your campaign has had a positive effect of AOV. This widget is displayed if revenues are generated following exposure to this campaign and only if a control group is defined for this campaign.

For an example of measuring the effectiveness of the campaign, see [The Campaign Level Data Bar and Dashboard](#).

6.2.3 Account Level Campaign Data Bar

The Campaign Data Bar at the account level provides Campaign Managers with a snapshot of how all of the campaigns in the account are performing.

	20,554,908 VISITS	1,299,093 PROSPECTS	1,952,803 EXPOSURES	135,477 ENGAGEMENTS	13,651 CONVERSIONS	£307,650 REVENUE	
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The following data is displayed to Campaign Managers in the Account Level Campaign Data Bar:

Visits: The number of monitored visitors in the website. The figure includes returning visitors.

Prospects: Represents the number of visits in which visitors are eligible to receive at least one graphical engagement (either invitation, button or content) from any campaign. This figure includes the control group, if defined. Visitors that are included in the control group at the account level do not see any engagements at all.

Exposures: Represents the number of graphical engagements that are displayed to the visitors, for example, buttons, invitations and content.

Engagements: Represents the number of interactive chats and clicks on content.

Conversions:

Primary KPI: Represents the number of conversion goals that were reached by visitors exposed to campaigns (regardless of whether they engaged or not).

Secondary KPI (appears only when a control group has been defined):

Inc. conversions: Represents the number of conversion goals that were generated as a result of exposure to campaigns, and would not have occurred without any exposure.

On hover:

Conversion lift: (appears only when a control group has been defined): Represents the percentage of conversion goals that were generated as a result of exposure to campaigns, and would not have occurred without any exposure.

Revenues:

Primary KPI: Revenues generated by visitors exposed to campaigns (regardless of whether they engaged or not).

Secondary KPI: (appears only when a control group has been defined)

Incr. revenues: Represents the revenues generated as a result of exposure to campaigns, and would not have occurred without any exposure.

On hover: (appears only when a control group has been defined)

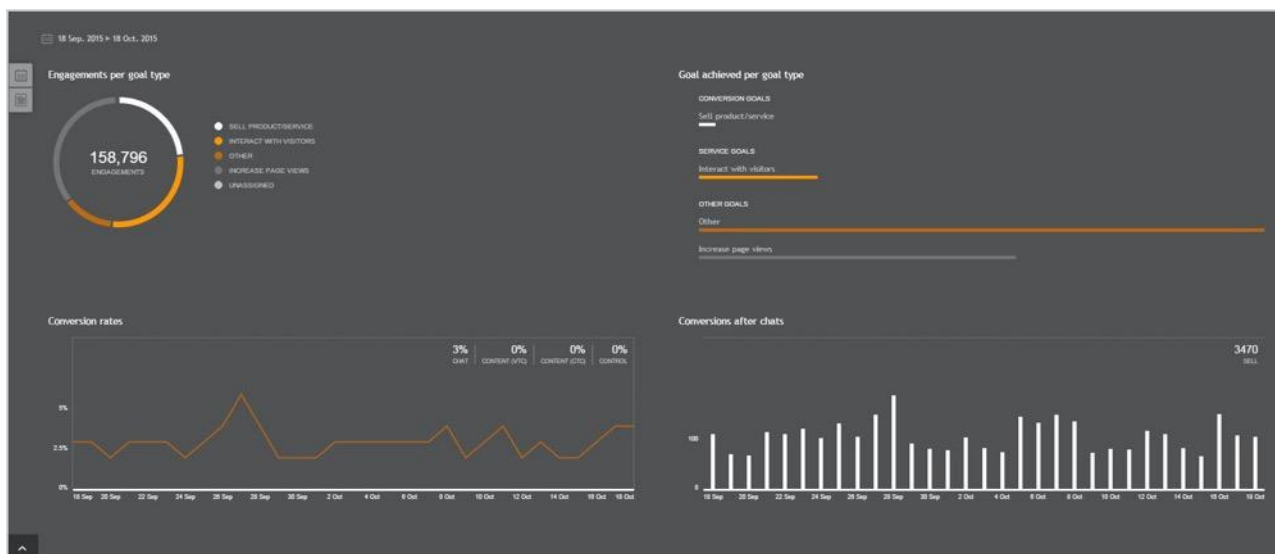
Revenue lift: Represents the percentage of revenues generated as a result of exposure to campaigns, and would not have occurred without any exposure.

6.2.4 Account Level Campaign Dashboard

The Campaign Dashboard at the account level provides Administrators and Campaign Managers detailed information on how all of the campaigns in the account are performing.

Goals are categorized either as Business goals or Assisting goals.

- **Business goals** include “sell a product or service” and “generate leads”. These goals are considered Conversions when they are reached.
- **Assisting goals** include “increase page views” and “other goals” and are considered Goal Reached when they are achieved. These are tracked and displayed only at the Campaign level (and not at the account level).



Engagements per Goal Type

This widget displays a per goal type breakdown of the total number of engagements according to goal type, including the number of interactive chats, the number of content clicks and total number of engagements (content clicks + interactive chats).

In other words, this widget displays how many of the engagements were categorized as related to campaigns that have a sales goal, how many to campaigns with “generate leads” as a goal, how many were meant to increase page views and finally, how many engagements belong to a campaign with any other type of goal. This total number is also displayed in the data bar as **ENGAGEMENTS**.

Goal Achieved per Goal Type

The number of goals that were achieved by visitors exposed to campaigns, per goal type. In this widget, the two types of goals are displayed; conversion goals (direct sales or leads goals) and other goals (assisting goals). Compare the number of goals that were achieved (for each goal type) to the number of engagements (per goal type). Information about the effectiveness of your engagements is reflected in this ratio, with higher ratios meaning more effective engagements.

Conversion Rates of the different channels:

- Chat conversion rate - conversion rate after interactive chat.
- Content (VTC: view-through conversion rate) - conversion rate after content exposures.
- Content (CTC: click-through conversion rate) - conversion rate after content clicks.
- Control group - conversion rate of the control group.

This widget compares the trend of conversion rates of chats, view-through conversion rates for content, and click-through conversion rates for content, over time. Here you can see which channel is giving you the best conversion rates. Here you can also see the effectiveness of the channels used by comparing chat and content conversion rates to those of the control group.

Conversions after Chats

This widget displays the total number of conversion goals that were reached following interactive chats, over time. Each bar is also divided into the type of goal so you can monitor which goals are being reached following chats day-by-day.

Average Order Value (AOV)

Here you can compare the AOV of visitors who were exposed to campaigns to the AOV of those who were in the control group and therefore not exposed to campaigns. If the AOV of exposed visitors is higher than that of the control group visitors, then your campaigns have had a positive effect on the AOV. This widget is displayed only if revenues are generated following exposure to the campaigns, and only if a control group is defined at the account level.

Revenues after Chats

This widget displays the total number of revenues that were generated following interactive chats, over time. This widget is displayed when revenues are generated following exposure to the campaigns.

6.2.5 Campaign Manager BI Dashboards

Business Intelligence (BI) dashboards provide more data, more filtering capabilities, and the ability to analyze success factors and campaign effectiveness over time. Each layer presents information at an increasing level of detail.

General Features

- The time frame that you selected in the Campaign Manager dashboard is transferred to the BI dashboard, so the data that you see in the BI dashboard will be displayed in the same time frame.
- When accessing the Campaign Manager BI dashboards, the Overview dashboard opens as the default dashboard.
- You can view up to 13 months of historical data.
- All dashboards can be exported to Excel, PDF, and to a printable version.
- Data can be presented in a daily, weekly, or monthly view, depending on the time frame you have selected.
- There are a number of filtering options available, such as time frame, goal type, and channel.
- You can find tooltips explaining the different metrics in the data bar by hovering over each of them.
- You can find tooltips explaining the data widgets by hovering over the information icon at the top right-hand corner of each widget.

Overview Dashboard

The Overview dashboard is an account level dashboard that currently consists of two key widgets representing two of the Campaign Manager's main areas of interest: Targeting, and Engagements. From each widget, the user can drill down to view detailed information.



Targeting Widget:

Two key characteristics of this widget can give you information about the effectiveness of your campaign:

- **Note whether the graph has an upward or downward trend.** An upward trend signifies an increase in the percentage of visitors targeted/exposed, while a downward trend signifies a decrease of that percentage.
- **Note the distance between the two lines.** Prospects are visitors to whom you wish to display graphical engagements. Exposed visitors are visitors that were in practice exposed to graphical engagements. The distance between the two lines represents the difference between the percentage of your prospects and that of your visitors who were actually exposed to graphical engagements. A large gap suggests that your campaigns are not reaching as many visitors as you would like. There could be several reasons for the gap.

Example: If you have defined a control group, then the visitors who belong to the control group are not going to be engaged. You will always see a gap that represents the control group. Another reason for a gap might be that you are targeting more visitors than the contact center can handle, so although you have eligible visitors (prospects), they cannot engage with agents.



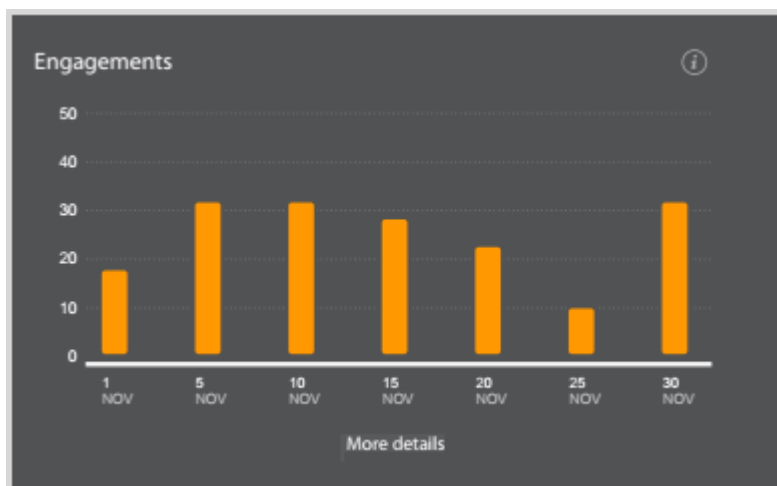
The y axis displays percentages and the x axis displays the date. The upper line represents the percentage of the visits in which the visitors were targeted by campaigns and became prospects over time. The lower line represents the percentage of the visits in which the visitors were exposed to graphical engagements, such as invitations, buttons, and content banners, over time.

To further drill down and understand the data in more detail, click on the widget, or click on **More details** at the bottom of the widget.

Engagements Widget

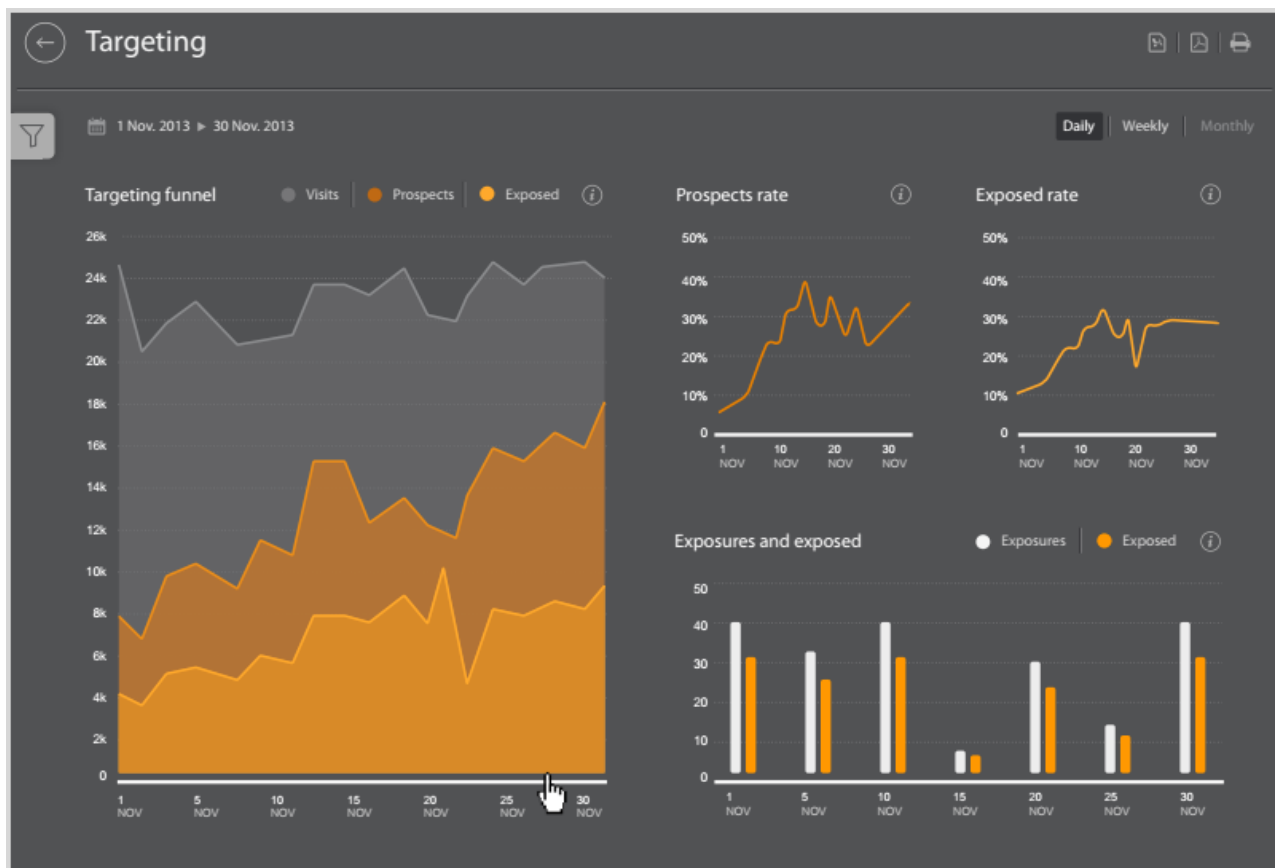
This bar chart displays the number of engagements (both content clicks and interactive chats, depending on the channels that you offer) that have taken place on your website over time. An increase in the number of engagements over time means that you are engaging with more visitors. By the same token, a decrease in the number of engagements means that you are engaging with fewer visitors.

You can also use this graph to monitor the usage of your rate plan over time and adjust your campaigns or your rate plan accordingly. To get more detailed data, click on the widget or on **More details** text at the bottom of the widget.



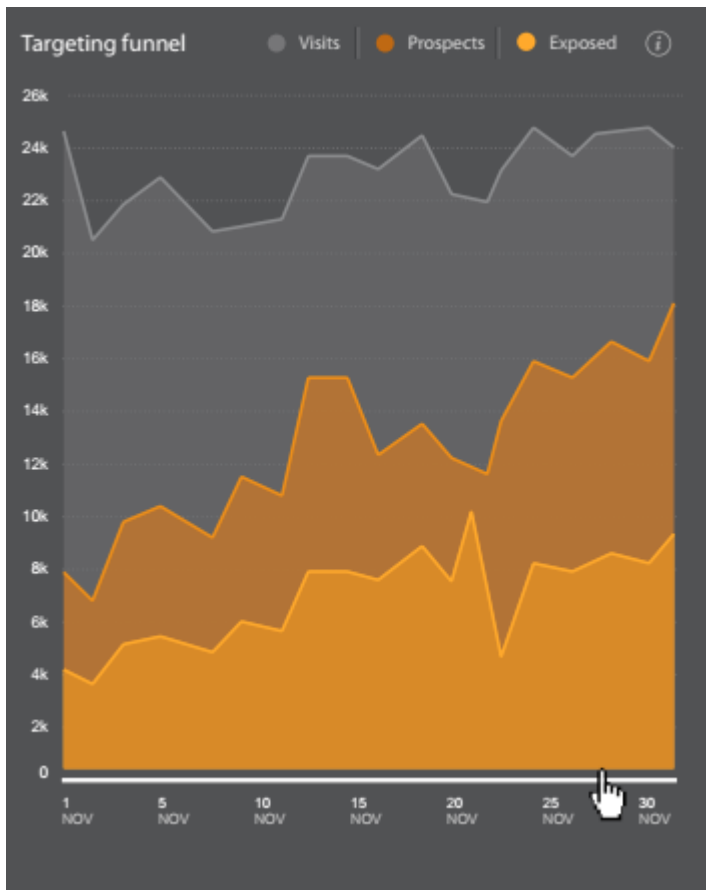
The y axis displays the number of engagements, and the x axis displays the date.

Targeting Dashboard



Targeting Funnel Widget:

From this graph, you can tell how many visitors funnel down to actually see the graphical engagements. Out of all the visitors to your website, only some are eligible to be engaged and are thus considered prospects. Out of the eligible visitors, only some are actually exposed to the campaigns. A large gap between the two upper lines might mean that too many of your visitors are not eligible for the campaign and you may want to expand your eligibility criteria. A large gap between the two lower lines might mean that you need to add more agents to support your chat program, or need to utilize the content channel appropriately.



The y axis displays the number of visits. The x axis displays the date. The upper line represents the overall number of visits to your website. The middle line represents the number of visits in which the visitors were targeted and became prospects. The bottom line represents the number of visits in which the visitors were exposed to graphical engagements (invitations, buttons or content banners).

To view additional metrics, switch to Grid View. These metrics include the following:

Metric	Description
Chat Offline Exposures	The number of unique chat buttons that were exposed in an offline stage, note that if a visitor viewed 2 type of impressions the count will be 2.
Chat Online Exposures	The number of unique chat buttons that were exposed on an online stage, note that if a visitor viewed 2 type of impressions the count will be 2.
Content Exposure	The number of unique content impressions that the visitor viewed.

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Metric	Description
Offline Graphical Engagement Viewed	Number of times that a graphical engagement on offline mode has been viewed. Multiple views of the same engagement will be counted more than once.
Online Graphical Engagement Viewed	Number of times that a graphical engagement on online mode has been viewed. Multiple views of the same engagement will be counted more than once.
Content Graphical Engagement viewed	Number of times that a content has been viewed. Multiple views of the same content will be counted more than once.
Offline Accepted invites	Number of offline chats invites that were accepted by the visitors.
Online Accepted invites	Number of online chats invites that were accepted by the visitors.
Content clicked	Number of content that were clicked by the visitors.

Prospects Rate Widget:

This graph allows you to view the number of prospects relative to all of the visits to your website. To correctly analyze what this graph means, evaluate it in conjunction with the Targeting Funnel widget which provides the number (in thousands) as opposed to percentages.



The y axis displays percentage, and the x axis displays the date. The line represents a percentage that reflects the number of prospects in relation to the total number of visits to your website.

Example:

A rising trend may mean one of the following:

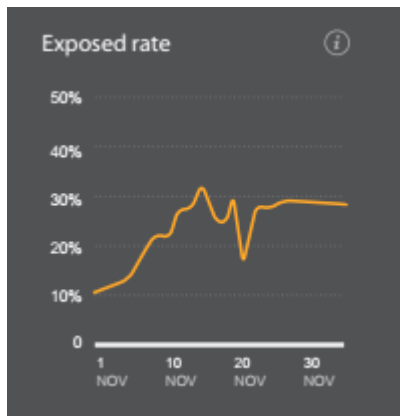
- If you added more campaigns and targeted more of your visitors, you may see the number of prospects rise while the number of visits to your website remains unchanged.*
- The number of visits to your website may have dropped causing a relative rise in the number of prospects.*

By analyzing the Funnel widget in conjunction with this widget, you can tell if you need to take corrective action.

Exposed Rate Widget:

This graph allows you to view the number of visits in which the visitors were exposed relative to the total number of your visits.

To analyze this widget, evaluate it together with the Targeting Funnel widget, which provides numbers.



The y axis displays the percentage, and the x axis displays the date. The line itself represents the number of visitors who were exposed to a graphical engagement (invitation, button or content banner) out of the total number of visitors.

Example:

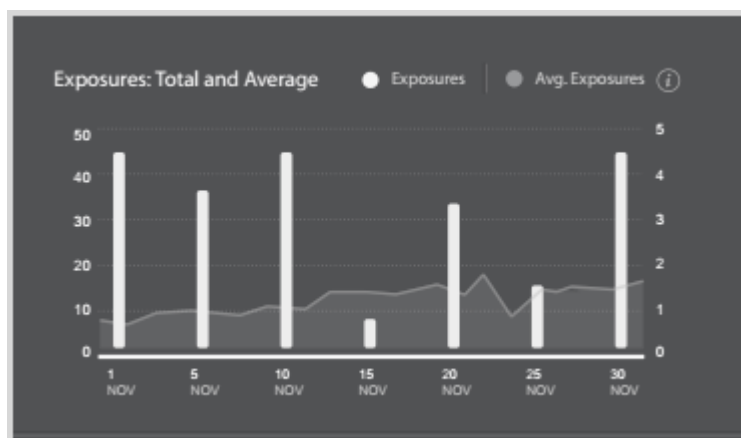
A rising trend may mean one of the following:

- You may have added content as a channel to your account and therefore exposed more visitors to content. If this is the case, you will see the number of exposed visits rise while the number of visits to your website remains unchanged.
- You may have added more agents to support your chat program and therefore increased the number of visitors exposed to chat invitations or buttons.
- The number of visits to your website may have decreased.

By analyzing the Funnel widget alongside this widget, you can tell if you need to take corrective action.

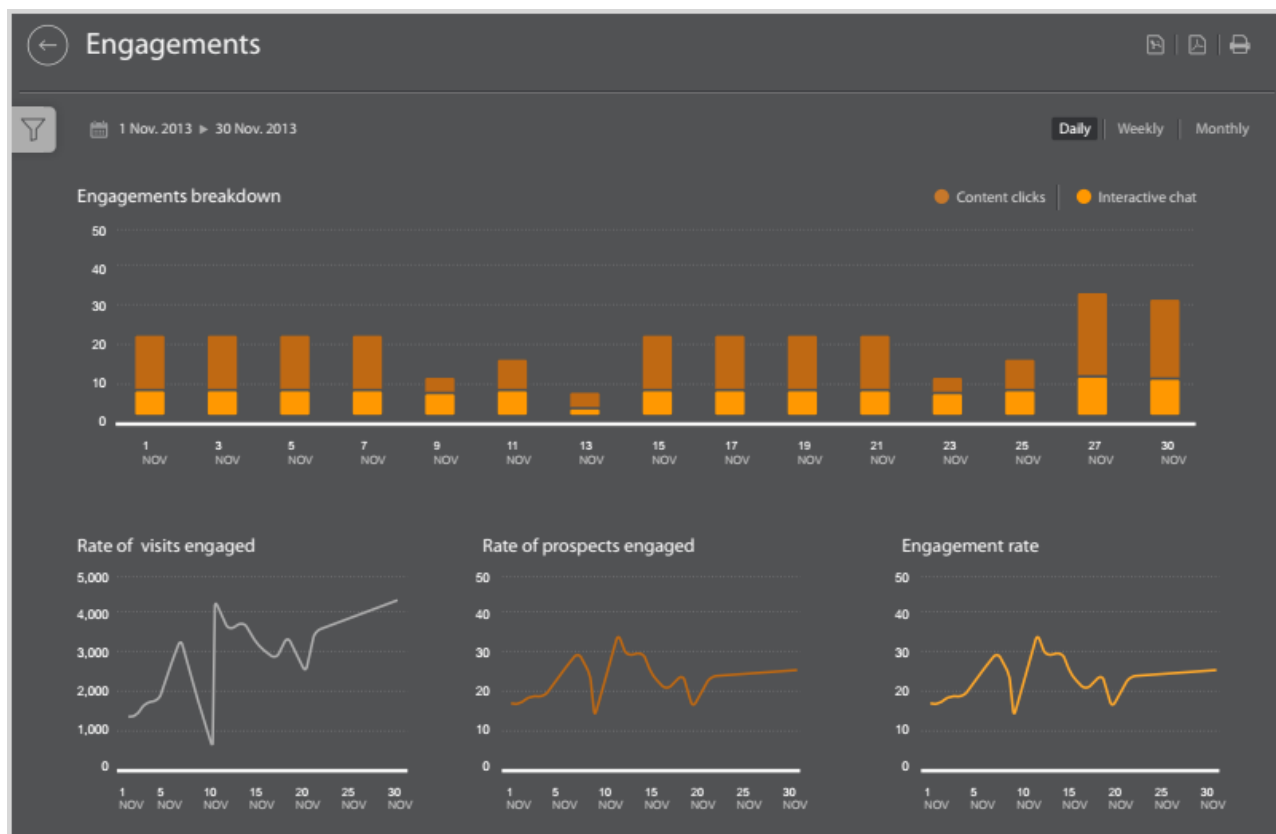
Exposures: Total and Average per exposed visit Widget:

This widget allows you to see whether you are exposing your customers to an appropriate number of graphical engagements, with an eye toward your business goals. Too many exposures can bother visitors and cause them to leave the site, eventually diminishing the success of your program.



Both the right and left y axes represent absolute numbers. The x axis displays dates. The bar graph represents the total number of graphical engagements (invitation, button or content banner) that were presented to all exposed visitors during their visits (the value can be found on the right y axis). The line graph represents the average number of graphical engagements that were displayed to the exposed visitors during each visit (the value can be found on the left y axis).

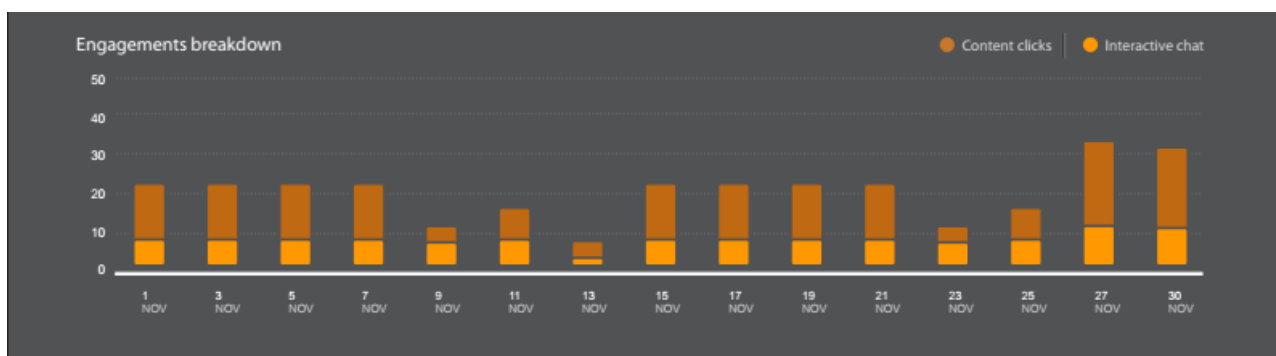
Engagements Dashboard



Engagements Breakdown Widget:

The graph displays the number and type of engagements which took place over time. You can compare the engagement types to see how they are distributed. You can see which channels are most prevalent, and optimize your campaigns accordingly.

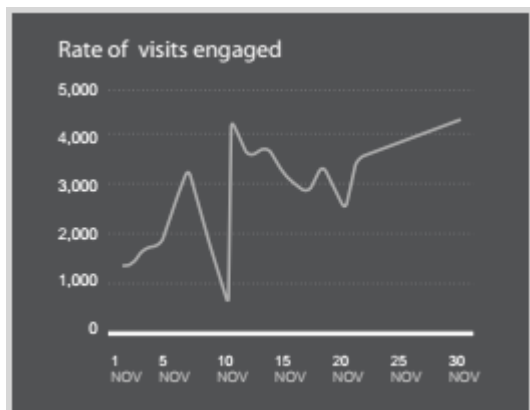
In addition, understanding engagement behavior and general trends can help you make decisions regarding the current rate plan you are using.



The y axis displays the number of engagements. The x axis displays the date. Each individual bar represents the total number of engagements for a particular date, split into content clicks and interactive chats.

Rate of Visits Engaged Widget:

Compare the overall number of people who visited your site to the number of those who engaged. Check whether your targeting rules are too strict and whether or not you've used the different channel options optimally, allowing a broader reach and thus a higher rate of engagements. Use this information to optimize your campaigns accordingly.



The y axis displays the percentage and the x axis displays the date. The line represents the number of visitors that engaged, out of all of the visitors to your site.

Rate of Prospects Engaged Widget:

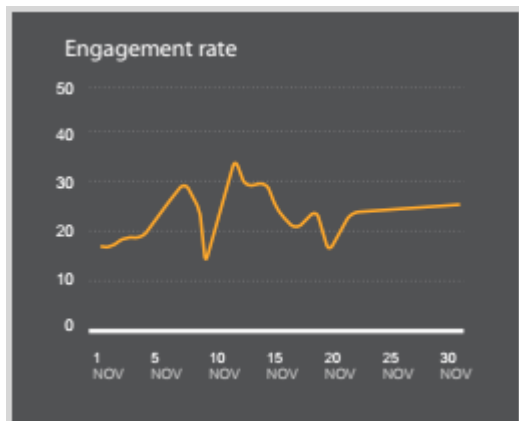
Compare the overall number of prospects on your website to the number of those that engaged. Check whether you are targeting prospects appropriately, and whether or not you are offering the right channel of engagement to suit your purpose. Optimize your campaigns accordingly.



The y axis displays the percentage and the x axis displays the date. The line represents the percentage of visitors that engaged out of all your prospects.

Engagements Rate Widget:

You can evaluate how effective the design, placement and channel of your graphical engagements are, if they are successful in influencing visitors to engage with you.

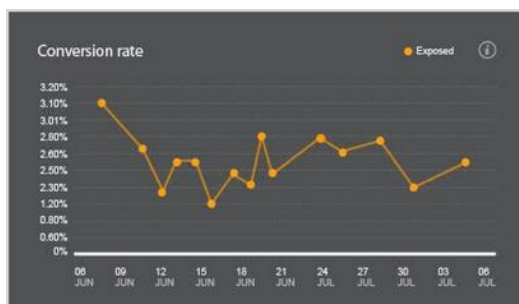


The y axis displays the percentage and the x axis displays the date. The line represents the percentage that evolved into engagements out of all exposures.

Conversion Rate Widget:

Two key characteristics of this widget can give you information about the effectiveness of your campaigns.

Note whether the graph has an upward or downward trend. An upward trend signifies an increase in conversion rate, while a downward trend signifies a decrease in conversion rate.

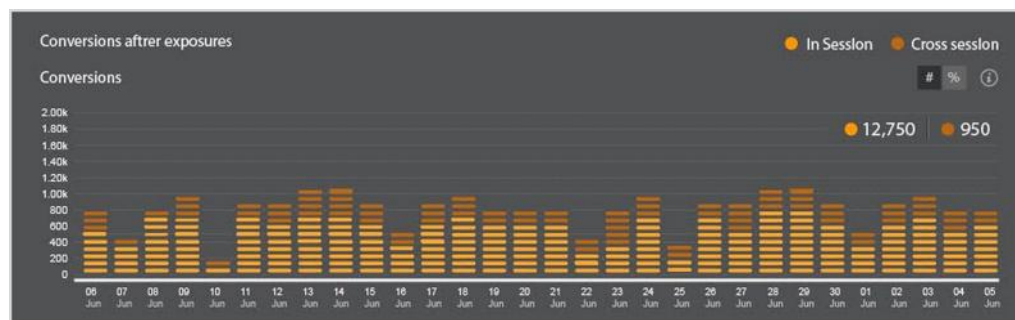


On the x axis, you can see the date, while on the y axis, you have the conversion rate.

The line represents the Conversion rate, which is equivalent to the number of conversions divided by the number of exposed visits (distinct).

Conversions After Exposures Widget:

An upward trend signifies an increase in conversions, while a downward trend signifies a decrease in those conversions. It is also useful to compare cross session conversions to in session conversions. Tweak your campaigns according to whether visitors convert in session, and better understand what causes them to convert. See how just exposing visitors to chat or content can build trust and loyalty between you and your customers, as exposure to these engagements is likely to cause higher conversion rates.

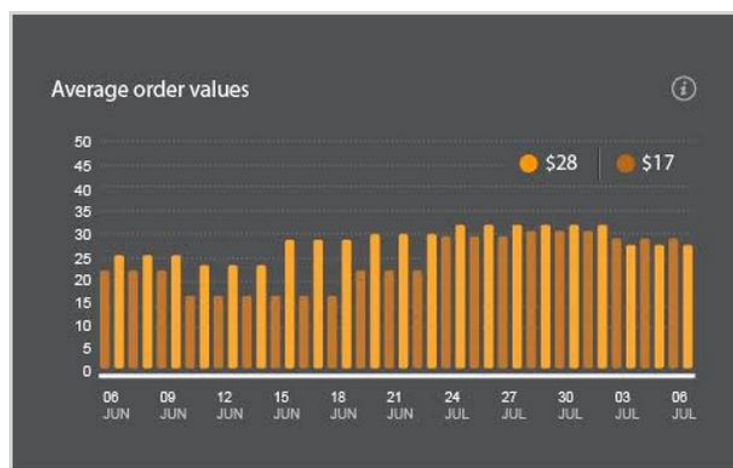


On the x axis you can see the date, while the y axis displays the total number of conversions. The bars represent the number of conversions that happened after the visitor was exposed to any graphical engagement, over time.

Key: Orange represents in session conversions. Brown represents cross session conversions.

Average Order Values After Exposures Widget:

An upward trend signifies an increase in average order value, while a downward trend signifies a decrease. Here too you can compare cross session conversions to in session conversions, to see which are producing a greater monetary value for your business goals. Optimize your campaign according to whether visitors convert in session, and better understand what causes them to convert. See how just exposing visitors to chat or content can build trust and loyalty between you and your customers, as exposure to these engagements is likely to cause higher average order value. Learn the difference in AOV between purchases that occurred right after the engagement and those which occurred after a longer period of time.



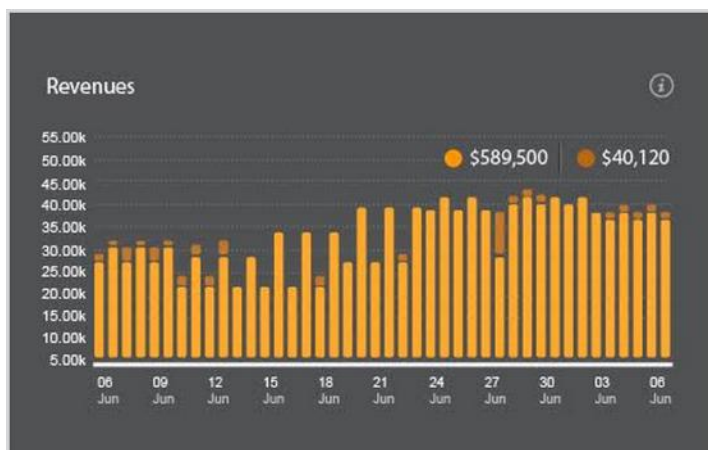
The x axis represents the date, and the y axis represents the average value in currency.

The bars represent the average order value in currency over time after exposures.

Key: Orange represents in session conversions; brown represents cross session conversions.

Revenues After Exposures Widget:

An upward trend signifies an increase in revenues, while a downward trend signifies a decrease. Here too you can compare cross session conversions to in session conversions, to see which are producing a greater monetary value for your business goals. Optimize your campaign according to whether visitors convert in session, and better understand what causes them to convert. See how just exposing visitors to chat or content can build trust and loyalty between you and your customers.

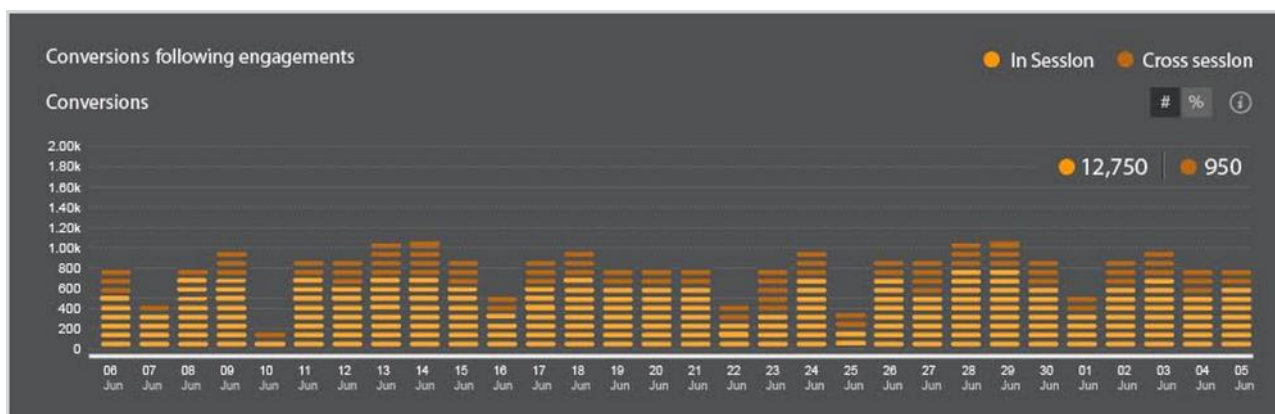


The x axis represents date, while the y axis represents the value in currency of revenues (in thousands). The bars represent the value of revenues in thousands, over time.

Key: Orange represents in session conversions, while brown is cross session conversions.

Conversions Following Engagements Widget:

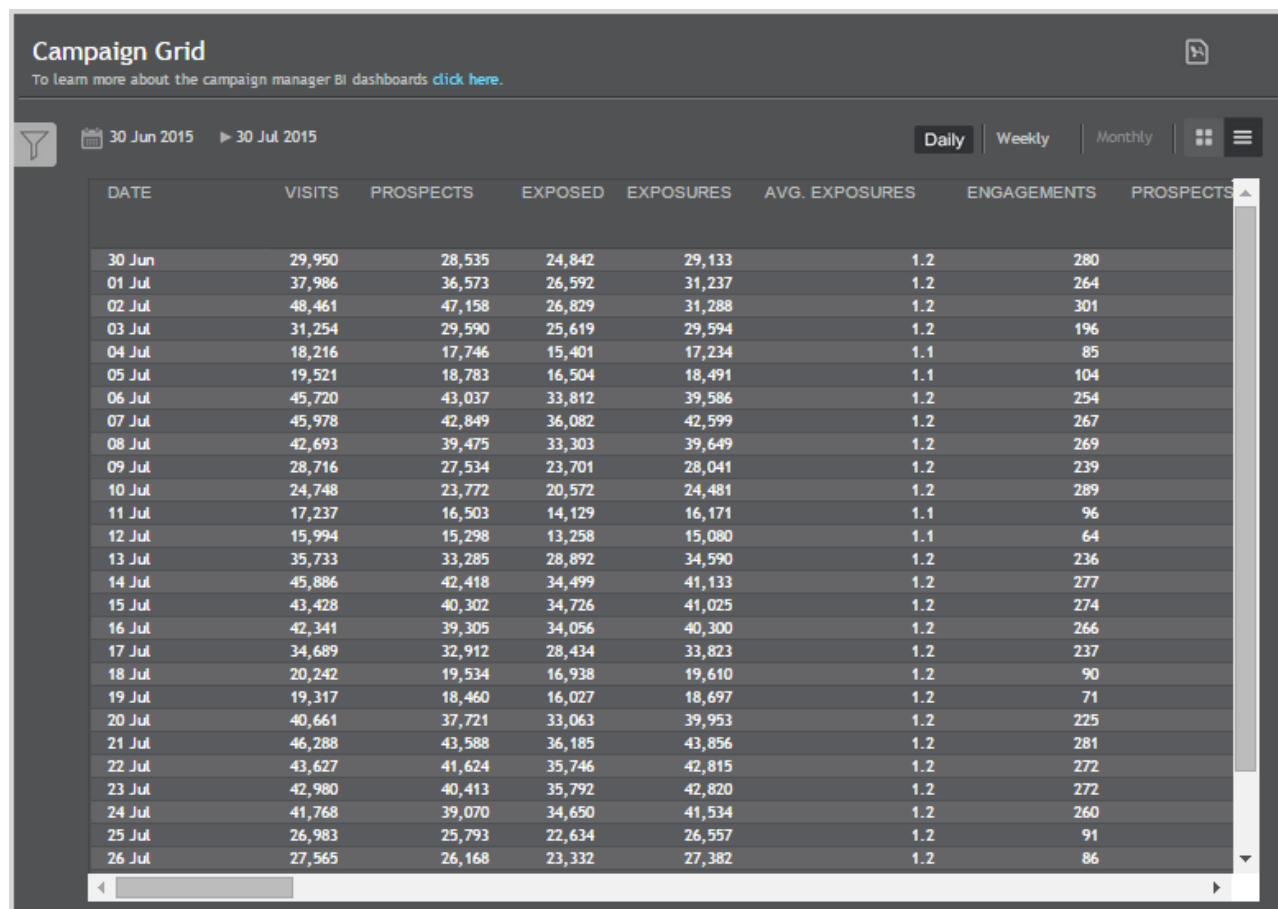
This dashboard represents data in a manner similar to the conversions following exposures dashboard, with a focus on engagements. Analyze the trends related to your engagements over time.



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Grid View

Grid View offers many site-level metrics. These cover metrics such as conversions, AOV, and revenue in-session and cross-session. They also include metrics that compare between the self-service journey and the metrics that were achieved through exposure to campaigns.



The screenshot shows the 'Campaign Grid' interface. At the top, there's a title 'Campaign Grid' and a link 'To learn more about the campaign manager BI dashboards click here.' Below the title, there's a date range selector set to '30 Jun 2015' to '30 Jul 2015'. To the right of the date range are tabs for 'Daily', 'Weekly', and 'Monthly'. Further right are icons for a grid and a list view. The main part of the interface is a table with the following columns: DATE, VISITS, PROSPECTS, EXPOSED, EXPOSURES, AVG. EXPOSURES, ENGAGEMENTS, and PROSPECTS. The table contains 27 rows of data, starting from 30 Jun and ending on 26 Jul. The data shows daily metrics for each day.

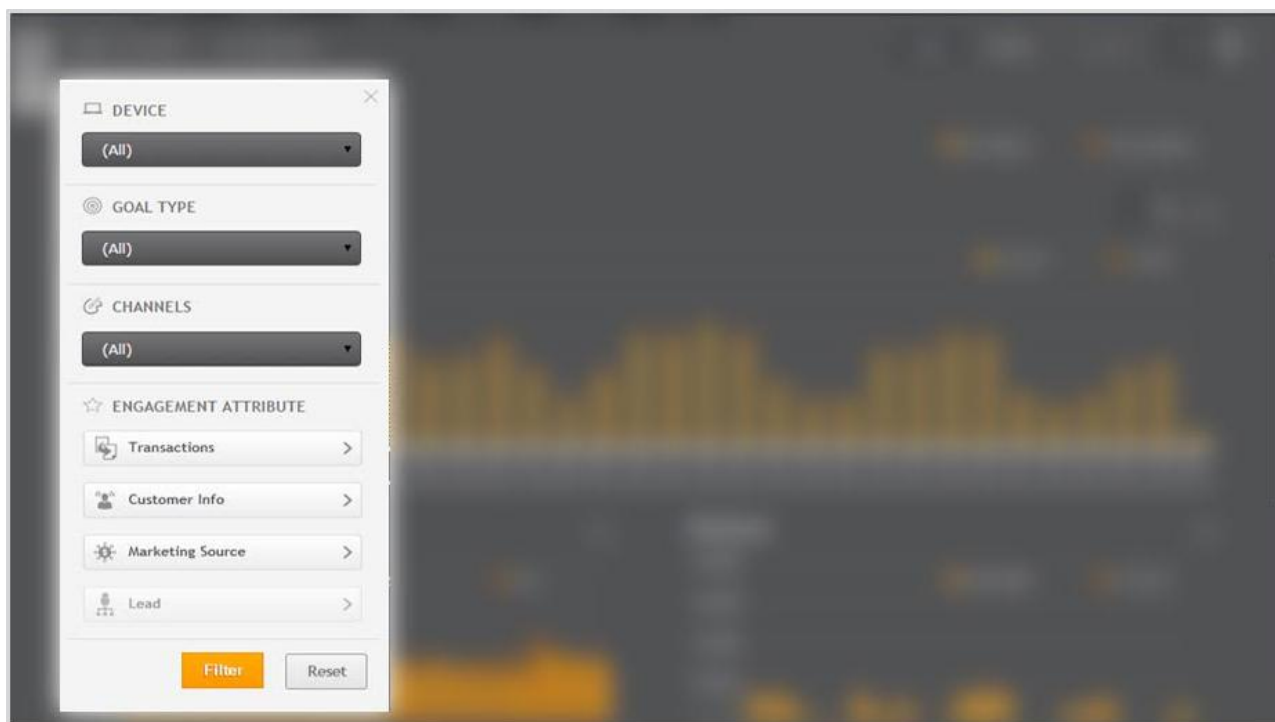
DATE	VISITS	PROSPECTS	EXPOSED	EXPOSURES	AVG. EXPOSURES	ENGAGEMENTS	PROSPECTS
30 Jun	29,950	28,535	24,842	29,133	1.2	280	
01 Jul	37,986	36,573	26,592	31,237	1.2	264	
02 Jul	48,461	47,158	26,829	31,288	1.2	301	
03 Jul	31,254	29,590	25,619	29,594	1.2	196	
04 Jul	18,216	17,746	15,401	17,234	1.1	85	
05 Jul	19,521	18,783	16,504	18,491	1.1	104	
06 Jul	45,720	43,037	33,812	39,586	1.2	254	
07 Jul	45,978	42,849	36,082	42,599	1.2	267	
08 Jul	42,693	39,475	33,303	39,649	1.2	269	
09 Jul	28,716	27,534	23,701	28,041	1.2	239	
10 Jul	24,748	23,772	20,572	24,481	1.2	289	
11 Jul	17,237	16,503	14,129	16,171	1.1	96	
12 Jul	15,994	15,298	13,258	15,080	1.1	64	
13 Jul	35,733	33,285	28,892	34,590	1.2	236	
14 Jul	45,886	42,418	34,499	41,133	1.2	277	
15 Jul	43,428	40,302	34,726	41,025	1.2	274	
16 Jul	42,341	39,305	34,056	40,300	1.2	266	
17 Jul	34,689	32,912	28,434	33,823	1.2	237	
18 Jul	20,242	19,534	16,938	19,610	1.2	90	
19 Jul	19,317	18,460	16,027	18,697	1.2	71	
20 Jul	40,661	37,721	33,063	39,953	1.2	225	
21 Jul	46,288	43,588	36,185	43,856	1.2	281	
22 Jul	43,627	41,624	35,746	42,815	1.2	272	
23 Jul	42,980	40,413	35,792	42,820	1.2	272	
24 Jul	41,768	39,070	34,650	41,534	1.2	260	
25 Jul	26,983	25,793	22,634	26,557	1.2	91	
26 Jul	27,565	26,168	23,332	27,382	1.2	86	

- Analyze your performance over time. This includes various trends in your account. For example, find out about conversion volume, in session, or session. Compare this to conversion volume after being exposed to content, after being exposed to a chat button, and after talking to an agent. See whether agents were able to increase the average order value and more.
- Compare Prospects to Exposures over time. Fewer exposures means less opportunities for consumers to convert. If there is a large gap between prospects and exposures, then you may want to check whether you had an agent availability limitation. This means that not all prospects who you were looking to engage with, were exposed to an engagement, due to limited agent availability. Specifically, perhaps the prospects were not shown an engagement due to the fact that there would not have been available agents to take any subsequent chats that may have occurred thanks to the exposure. Or perhaps you need to change the configuration of campaigns.

To access Grid View, click the Grid icon (≡).

Filtering Options

Track your campaign performance with more granular data. Get a better view of your campaign performance by filtering by detailed Engagement Attributes (Transactions, Customer Info, Marketing Source). Other filtering options can be Goal Type, Channel, and device. This can answer such questions as: How many conversions of value greater than 50 USD took place in March. Alternatively, you can see how many service transactions came from your VIP customers vs regular customers. Additionally, you can see how much of your revenue was received from email campaigns. These are just a few of the possible questions that you can answer when using filtering options.



Additionally, filter your data according to where your visitors are arriving from - desktop, tablet and mobile. Analyze trends related to how many clients reached you from a mobile device. Compare what kinds of actions customers take that are specific to mobile, as opposed to desktop. Analyze whether you are satisfied with your performance on mobile, and see whether visitors are able to achieve the goal that you defined for the campaign.

6.3 Meaningful Connection Score

The Meaningful Connection Score (MCS) is an automatic, unbiased method to measure the relationship between consumers and brands. It does not rely on customers answering surveys, but rather on a deep analysis of the tone, content, and sentiment of the consumer's actual conversations with the brand.

The MCS is calculated in a bottom up, modular approach. This property enables the MCS to measure several aspects of the interaction.

- The MCS process starts from the Message level attributing a score, in real time, to every message that enters the system. LivePerson calls this level the MESSAGE SCORE.
- The combination of Message Scores creates a dynamic CONVERSATION MCS that is continuously updated until the conversation is closed.
- Combining all the Conversation MCSs of one consumer creates the CONSUMER MCS - an accurate picture of the current emotional connection level of a consumer.
- The combination of all Consumer MCSs creates the BRAND MCS.

The Meaningful Connection Score is displayed both in the Visitor List and in the Agent

Workspace. Each chat is then labelled with a positive sentiment icon (😊) or a negative sentiment icon (😡).

Web Visitors Web History Agents									
Your workspace for live connections with consumers through web and mobile sites. View all current conversations along with real time visitors.									
🗨️	😊	VISITOR NAME	COUNTRY	SKILL	AGENT NAME	CURRENT PAGE	BROWSER	IP	VISIT START
🗨️	😡	Visitor	🇺🇸	N/A	Danny dean	Homepage (1)	🔍	207.46.244.188	9:34 pm
🗨️	😡	Visitor	🇺🇸	Support	Me	Homepage (1)	🔍	63.123.44.190	9:24 pm
🗨️	😡	Visitor	🇺🇸	Sales	Gulli	Homepage (10)	🔍	63.123.44.190	9:31 pm
🗨️	😊	John Smith	🇺🇸	Sales	Me	Chat page (15)	🔍	207.46.244.188	9:16 pm
🗨️	😊	Visitor	🇺🇸	Chat	Me	Chat page (7)	🔍	217.19.79.9	9:15 pm
🗨️	😊	Visitor	🇺🇸	Sales		Store (4)	🔍	88.219.86.183	9:15 pm
🗨️	😊	Hans christian andersen	🇩🇰	N/A		Book store (8)	🔍	63.123.44.190	9:05 pm
🗨️	😊	Ben	🇺🇸	Product holl...		Product ho...(6)	🔍	88.219.86.183	9:15 pm
Page 1 of 12 < >									
☰	0 WAITING	24 Visitor 😡	23 Visitor 00:10	22 John Smith	19 Visitor 00:10 😡	21 Visitor 00:10	0 INACTIVE		

Figure 9: Visitor List with Meaningful Connection Score

6.4 Hot Topics

Hot Topics is a powerful tool that provides immediate insight into what drives consumers towards or away from brands. With Hot Topics, Administrators and Agent Managers can view the topics that drive their consumers' sentiment — both negative and positive - and explore each topic to understand their reasoning.

LivePerson has developed a unique tool based on text analytics, specializing in conversations between brands and consumers. Every line of conversation that is entered, whether by the Customer Care Professional or by the consumer, is analyzed in real time. This analysis provides a result of 'positive', 'negative', or 'neutral' sentiment, per sentence or per topic.

A Hot Topic is a topic of conversation that has been detected to have a negative or a positive sentiment. A sentiment expression is a word or a short phrase that describes how the writer felt about the topic.

Example: "The original problem is solved but the router is now not working so I would like to get rid of XXXXXX and move to YYYYYY".

Analyzed by the Hot Topic service the result is:

- Line Topic: router
- Line Sentiment expression: not working
- Line Sentiment polarity - NEG

The final result will be: Hot Topic = {router, not working, Negative} number of mentions: 1.

For a defined time frame, the hot topic service scans all text lines and extracts the Hot Topics line by line.

Hot Topics analyzes the following units:

Unit	Description
Total chats analyzed	The total number of chats analyzed in the specified time interval only.
Chats with hot topics	The total number of chats that had a topic attached to a sentiment expression. This is calculated per participant (visitor/agent) and according to the time filter.
Percentage of positive mentions	The percentage of chats that a positive topic out of the total number of chats with sentiment topics. This is calculated according to the time and participant filters.
Percentage of negative mentions	The percentage of chats that a negative topic out of the total number of chats with sentiment topics. This is calculated according to the time and participant filters.
Absolute number of positive chats	The number of chats that contained a positive topic. This is calculated according to the time and participant filters.
Absolute number of negative chats	The number of chats that contained a negative topic. This is calculated according to the time and participant filters.
Positive topic percentage	The number of positive topics found in the chats analyzed, divided by the number of positive and negative mentions of the topic.
Positive topic count	The number of positive topic mentions out of the total topic mentions.
Negative topic percentage	The number of negative topics found in the chats analyzed, divided by the number of positive and negative mentions of the topic.

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Unit

Description

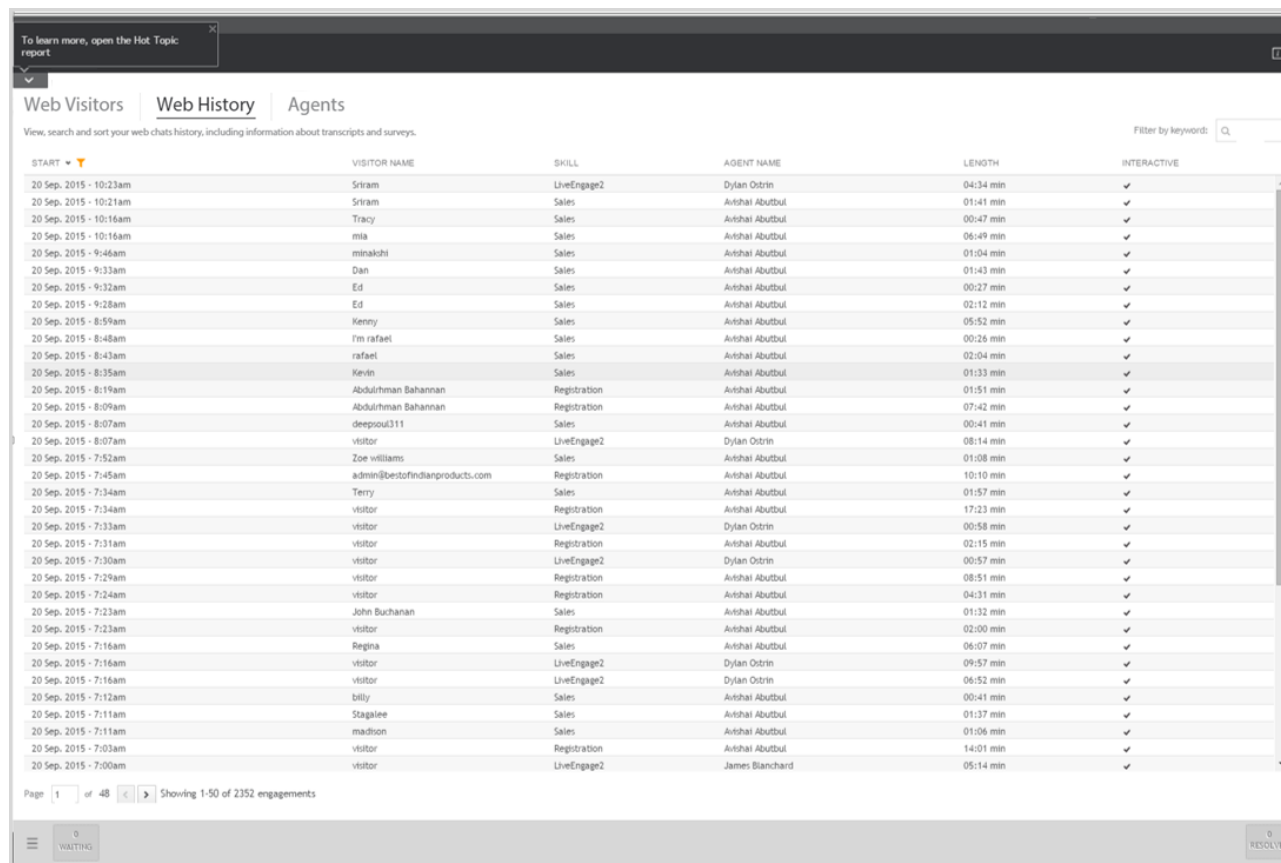
Negative topic count

The number of negative topic mentions out of the total topic mentions.

Hot Topics can be accessed from the data analysis screen of the Web History tab.

To access Hots Topics:

1. In LiveEngage, select the Visitors module, and then click on **Web History**.



The screenshot displays the 'Web History' tab in the LiveEngage interface. At the top, there are tabs for 'Web Visitors', 'Web History', and 'Agents'. Below the tabs, a search bar is labeled 'Filter by keyword:'. The main area contains a table with columns: 'START', 'VISITOR NAME', 'SKILL', 'AGENT NAME', 'LENGTH', and 'INTERACTIVE'. The table lists various chat transcripts from September 20, 2015, with details on visitor names, agent skills (e.g., LiveEngage2, Sales, Registration), agent names (e.g., Dylan Ostrin, Arthai Abutbul), and chat durations. A pagination bar at the bottom indicates 'Page 1 of 48' and 'Showing 1-50 of 2352 engagements'.

START	VISITOR NAME	SKILL	AGENT NAME	LENGTH	INTERACTIVE
20 Sep. 2015 - 10:23am	Sriram	LiveEngage2	Dylan Ostrin	04:34 min	✓
20 Sep. 2015 - 10:21am	Sriram	Sales	Arthai Abutbul	01:41 min	✓
20 Sep. 2015 - 10:16am	Tracy	Sales	Arthai Abutbul	00:47 min	✓
20 Sep. 2015 - 10:16am	mia	Sales	Arthai Abutbul	06:49 min	✓
20 Sep. 2015 - 9:46am	minakshi	Sales	Arthai Abutbul	01:04 min	✓
20 Sep. 2015 - 9:33am	Dan	Sales	Arthai Abutbul	01:43 min	✓
20 Sep. 2015 - 9:32am	Ed	Sales	Arthai Abutbul	00:27 min	✓
20 Sep. 2015 - 9:28am	Ed	Sales	Arthai Abutbul	02:12 min	✓
20 Sep. 2015 - 8:59am	Kenny	Sales	Arthai Abutbul	05:52 min	✓
20 Sep. 2015 - 8:48am	I'm rafael	Sales	Arthai Abutbul	00:26 min	✓
20 Sep. 2015 - 8:43am	rafael	Sales	Arthai Abutbul	02:04 min	✓
20 Sep. 2015 - 8:35am	Kevin	Sales	Arthai Abutbul	01:33 min	✓
20 Sep. 2015 - 8:19am	Abdurrhman Bahannan	Registration	Arthai Abutbul	01:51 min	✓
20 Sep. 2015 - 8:09am	Abdurrhman Bahannan	Registration	Arthai Abutbul	07:42 min	✓
20 Sep. 2015 - 8:07am	deeprou311	Sales	Arthai Abutbul	00:41 min	✓
20 Sep. 2015 - 8:07am	visitor	LiveEngage2	Dylan Ostrin	08:14 min	✓
20 Sep. 2015 - 7:52am	Zoe Williams	Sales	Arthai Abutbul	01:08 min	✓
20 Sep. 2015 - 7:45am	admin@bestofindianproducts.com	Registration	Arthai Abutbul	10:10 min	✓
20 Sep. 2015 - 7:34am	Terry	Sales	Arthai Abutbul	01:57 min	✓
20 Sep. 2015 - 7:34am	visitor	Registration	Arthai Abutbul	17:23 min	✓
20 Sep. 2015 - 7:33am	visitor	LiveEngage2	Dylan Ostrin	00:58 min	✓
20 Sep. 2015 - 7:31am	visitor	Registration	Arthai Abutbul	02:15 min	✓
20 Sep. 2015 - 7:30am	visitor	LiveEngage2	Dylan Ostrin	00:57 min	✓
20 Sep. 2015 - 7:29am	visitor	Registration	Arthai Abutbul	08:51 min	✓
20 Sep. 2015 - 7:24am	visitor	Registration	Arthai Abutbul	04:31 min	✓
20 Sep. 2015 - 7:23am	John Buchanan	Sales	Arthai Abutbul	01:32 min	✓
20 Sep. 2015 - 7:23am	visitor	Registration	Arthai Abutbul	02:00 min	✓
20 Sep. 2015 - 7:16am	Regina	Sales	Arthai Abutbul	06:07 min	✓
20 Sep. 2015 - 7:16am	visitor	LiveEngage2	Dylan Ostrin	09:57 min	✓
20 Sep. 2015 - 7:16am	visitor	LiveEngage2	Dylan Ostrin	06:52 min	✓
20 Sep. 2015 - 7:12am	btily	Sales	Arthai Abutbul	00:41 min	✓
20 Sep. 2015 - 7:11am	Stagalee	Sales	Arthai Abutbul	01:37 min	✓
20 Sep. 2015 - 7:11am	madison	Sales	Arthai Abutbul	01:06 min	✓
20 Sep. 2015 - 7:03am	visitor	Registration	Arthai Abutbul	14:01 min	✓
20 Sep. 2015 - 7:00am	visitor	LiveEngage2	James Blanchard	05:14 min	✓

2. Click to pull down the left hand side the data screen. The Hot Topics screen is displayed.

Note: There is currently no connection between the filtering in the Web History and the Hot Topic results.

Hot Topics includes two filters, which are displayed inside the Hot Topic screen:

- **Time filter:** A timeframe of two weeks is recommended.
- **Participant filter:** Enables the user to analyze agent lines, consumer lines, or both. By default, consumer lines are analyzed.

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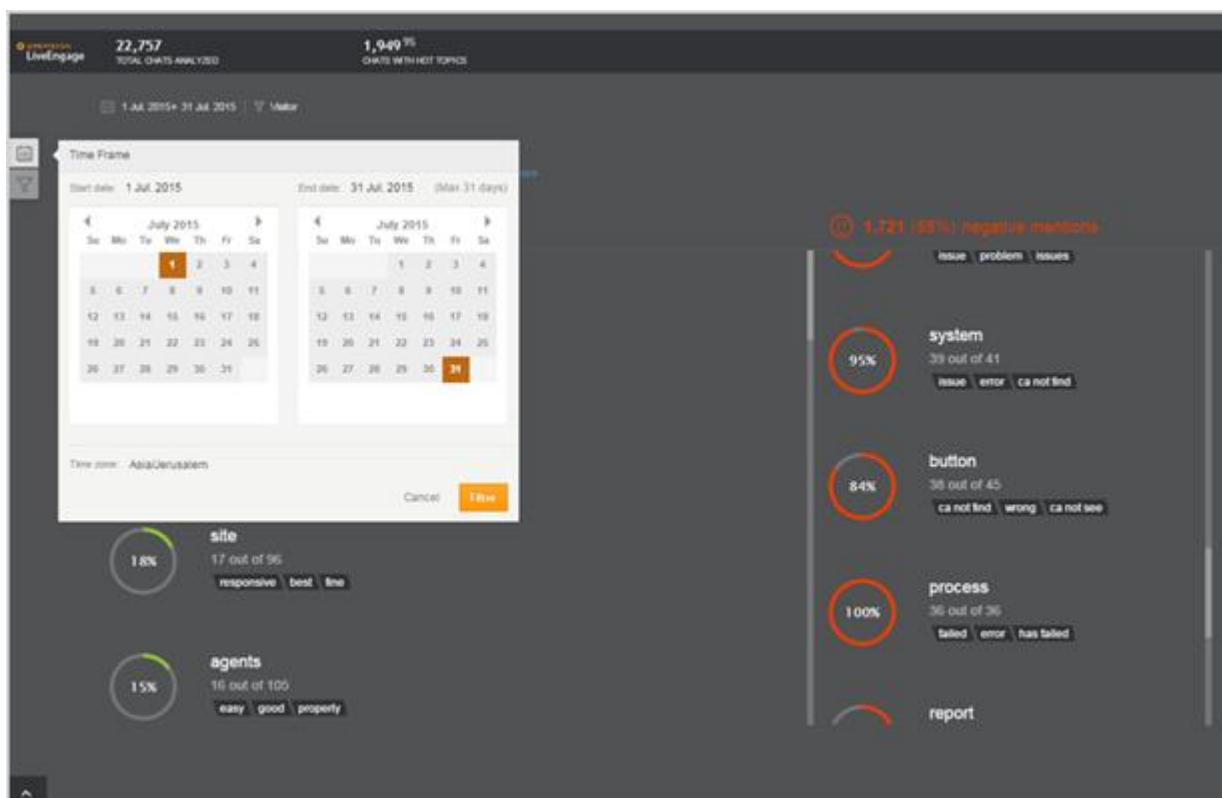


Figure 10: Time filter

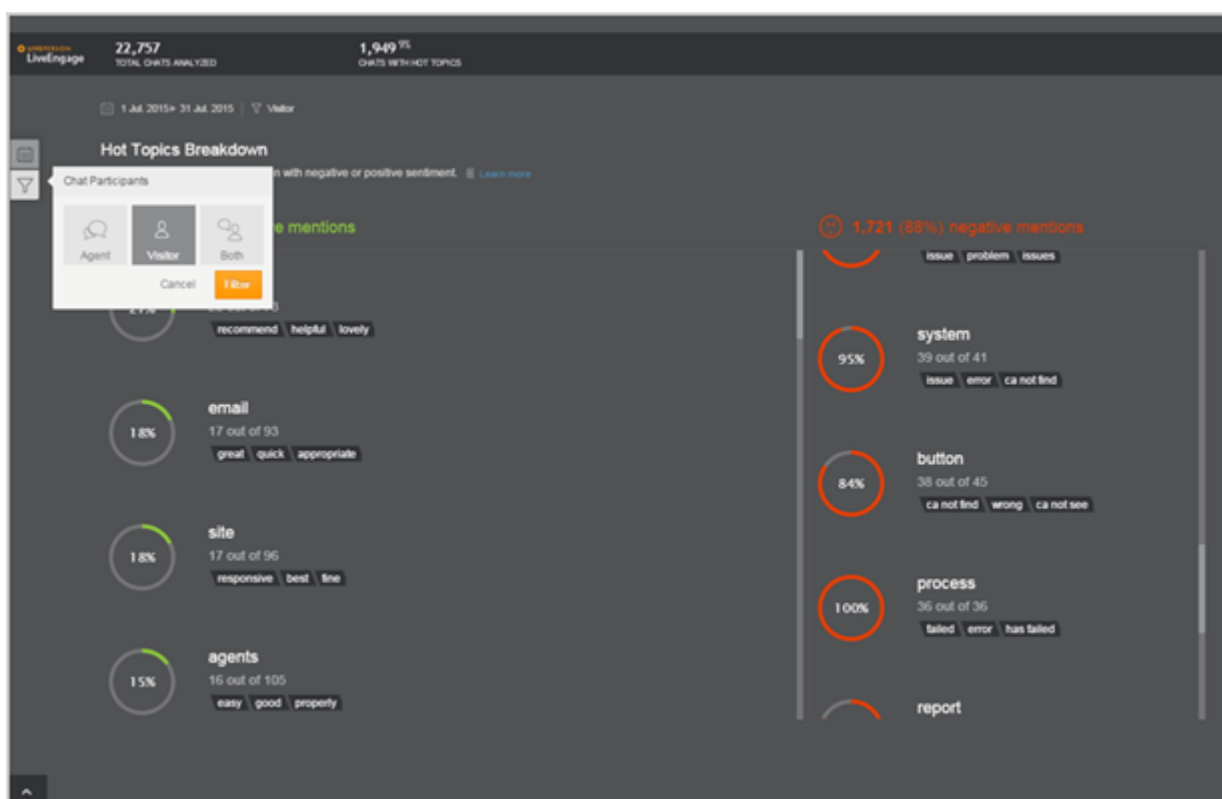
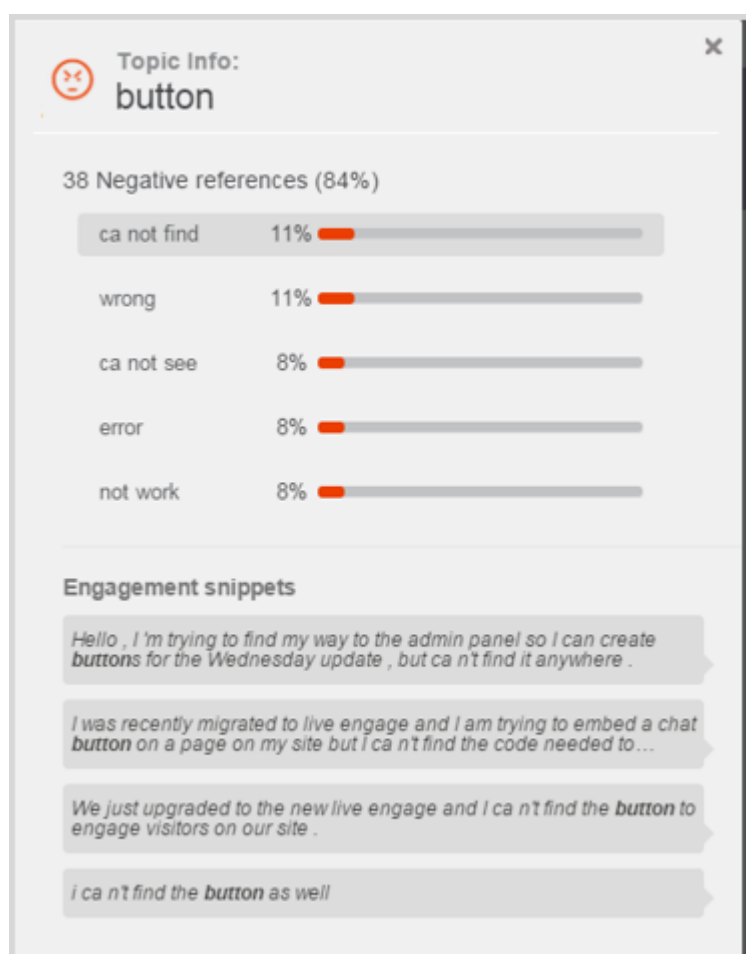


Figure 11: Participant filter

The drilldown window is displayed at the right-hand side of the Hot Topics screen.
To display the drilldown window, click a Hot Topic.



The drilldown window provides the following additional information:

- The percentage of each sentiment expression. This is the number of times the specific sentiment expression was used to describe the displayed Hot Topic, divided by the total number of sentiment expressions mentioned for the displayed topic.
- Two additional sentiment expressions.
- Up to 5 engagement snippets from the analyzed chats containing the relevant sentiment expression. These may be expressed by the consumer or the agent, depending on the filter chosen. The snippet list is composed of the most frequent snippets in relation to a specific sentiment expression.

7. System Requirements

We are constantly advancing our technology to ensure rich engagement experiences for our customers. This includes using the most up-to-date browsers, which provide better encryption, privacy support by default, and access to the full functionality of LiveEngage. Using the latest browsers ensures better encryption, privacy support by default, and access to the full functionality of LiveEngage.

For the best LiveEngage experience, customers are required to use one of the certified operating systems and browser versions listed in our [LiveEngage System Requirements and Language Support PDF](#).

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