Liveperson Contact Center Cheat Sheet

Chat Communication Panel - Toolbar

A B C D E F G H

| Transfer | Stop | History | | | | | |

K
Jesse: Welcome to our Live Chat service. Allow me to introduce myself as your chat representative. My name is Jesse. How may I help you today?

Visitor: Hello. I would like to purchase a bottle of red wine that I can pair with chocolate. Do you have any suggestions?

Jesse: You can pair different kind of sweet wine with chocolate. Click to open the article for more information: What wine should I pair with Chocolate?

Visitor: Thanks! It's exactly what I was looking for! How can I purchase a bottle of Cabernet Sauvignon?

I Arial 10 **B** *I* U

J

K Jesse: Let me start a cobrowse session. That way, I can help you purchase online. Send

I ▶ **TEXT FORMATTING TOOLS** Format the style and color of the fonts while chatting.

J ▶ **SEND LINK** Click 🔗 to mask a long and complicated URL string with a quick description of the link for a customer to see.

K ▶ **CHAT SESSION** Type your text at the bottom and press Enter on your keyboard to communicate with your visitor. Be sure to follow your company guidelines to standardize the chat service.
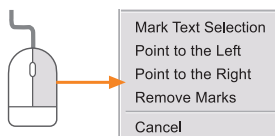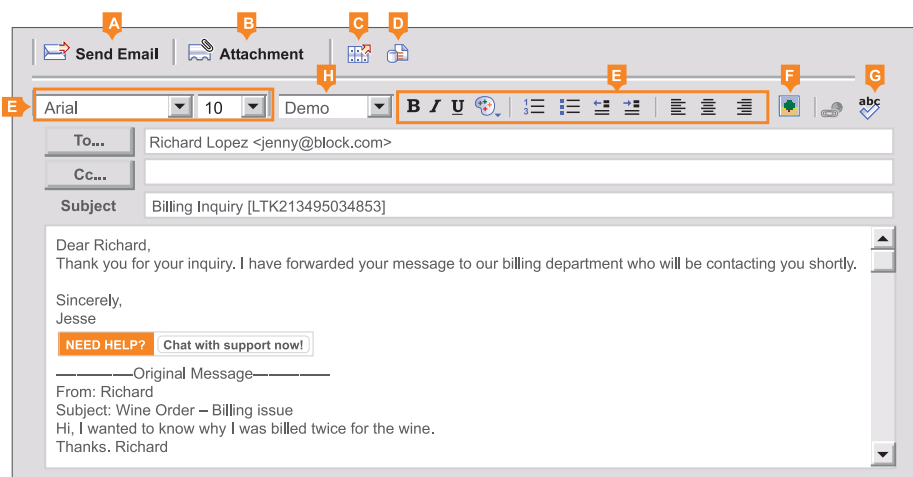
A **TRANSFER** Transfer a chat to another agent or a skill group. Add a note summarizing the chat to ensure fast resolution.

B **STOP** Stop the chat session.

C **HISTORY** Click to view the visitor's history (Email-Chat-LiveCall-Knowledgebase-Note-Call).

D **PUSH A PAGE** Click to push a page to your visitors. Enter the URL and click OK.

E **SEND HTML** Click ‹› to send HTML links or images to customers while chatting.

F **KNOWLEDGEBASE** Click to display and select articles and/or documents while chatting.

G **CANNED ANSWERS** Click to select, edit, and send canned response(s) from the list while chatting.

H **CO-BROWSE** Help your visitors complete an online form and orient them on your website. Check that the Cobrowse Support is set to "Yes" in the Info tab of the Information panel. Click to start or stop a cobrowse session. Right-click in the co-browse tab to open the Co-browse option list. Select an option from the list.

Mark Text Selection
Point to the Left
Point to the Right
Remove Marks
Cancel

Add Your Company's Guidelines when using Chat

Email Communication Panel - Toolbar

A B C D

| Send Email | Attachment | | |

H E F G
E Arial 10 Demo **B** *I* U

To... Richard Lopez <jenny@block.com>
Cc...
Subject Billing Inquiry [LTK213495034853]

Dear Richard,
Thank you for your inquiry. I have forwarded your message to our billing department who will be contacting you shortly.

Sincerely,
Jesse

NEED HELP? Chat with support now!

————Original Message————
From: Richard
Subject: Wine Order – Billing issue
Hi, I wanted to know why I was billed twice for the wine.
Thanks. Richard

G ▶ **CHECK SPELLING** Click to check spelling for mistakes prior to sending emails communications.

H ▶ **OUTGOING RESPONSE TEMPLATES** Click the drop-down arrow to select a specific response template for your email communications.

Add Your Company's Guidelines when using templates

A **SEND EMAIL** Send (deliver) the current email to your customer.

B **ATTACHMENT** Click to attach a document to your emails.

C **KNOWLEDGEBASE** Click to display and select articles and/or documents in your email communications.

D **CANNED LETTERS** Click to select, edit, and send canned letter(s) from the list in your email communications.

E **TEXT FORMATTING TOOLS** Format the font style, font size, font color, alignment, and indent of your email communications.

F **SEND PICTURES** Click to open the **Pictures** window. Browse to select a picture, customize the layout, and click OK to add the picture to your email communication.

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Liveperson Contact Center - The Agent Workflow

Liveperson - LP 4453498347 [Gaelle - Logged In]

5 File **Control View Tools Liveperson Canned Help**

10 Take [6]   Next Response   **9** Invite   Engage   **11** Ticket [11]   ↓ ↑   Search   Admin Console   Phone

6 View: Workspace | Visitors In Site: 50 | Waiting For Chat: 6 | **2** Chat: Online | Phone: Online

Contact ID	Ticket ID	Skill	State	Operator	Total Time	Wait Time	Chat Start Time	Chat Time	current page/ticket subject	# of pages	Browser
Gaelle	LTK11023450000X	Support	Out of site	Dana	0:00:52	0:00:04	11:20:52 AM	-	http://finerwines.com/sh...	3	Firefox 1.5.0.7
Steve	LTK11043538090X	Sales		Keren		0 days, 2h...		-	Shipping information		
Gabi	LTK11023874574X	Sales	Chat Ended	Nir	0:29:24	0:00:28	11:20:28 AM	0:02:02	http://server.a/help/telav...	4	MSIE 6.0
Jonathan	LTK11023244563X	Sales	Chatting	Arnon	0:17:02	0:00:32	11:20:22 AM	0:07:08	http://finerwines.com/ba...	5	Firefox
Admin	LTK11737884563X	Support	Talking	Sean	0:01:38	0:00:09	11:20:09 AM	0:10:05	http://finerwines.com/sh...	9	MSIE 6.0

7

TicketID: LTK234243523465   Subject:
Name: Nir

13 Phone | Chat | Email | Note | Log Call

Transfer Stop History

Alert | Release | Info | Navigation | Page Viewer | Contacts | Contact History | CoBrowse
4   **8**   **12**

Jesse: Thank you for contacting us. Is there a specific question I can help you with?
Visitor: Hello. I am purchasing two bottles of shiraz but I cannot find the shipment cost.
Jesse: The shipment cost is $50 (includes tax and shipping). Also, your credit card will not be billed until one week prior to each shipment.
Visitor: Thanks.
Jesse: We offer special discounts to wine and shipment cost if you signup to our wine club
Visitor: really? Where can I read more about your services?
Jesse: Click here for more information about our Wine Club Service.
Visitor: that's very interesting. What do I need to do to sign up?

14

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Jesse: Let me start a cobrowse session. That way, I can help you sign up through our e-store.   Send

GOOGLE AdWords — VISITOR SEARCH: **Buy Shiraz Wine**

Help with Live Keyword

For Help, press F1   **3**

HOT KEYS

F1	Open the Help page
F2	Accept next chat in queue
F3	Move to next chat awaiting response
F4	Open the Canned Responses window
F5	Refresh the operator window
F7	Check spelling in Email
F9	Toggle Search Ticket views
Ctrl F10	Open dial keypad
Ctrl C	Copy text
Ctrl V	Paste text
Ctrl X	Cut text
Ctrl D	Delete text

Add Your Company's Hot Keys

STARTING MY DAY

1 Double-click the LivePerson Operator icon and login using your Site ID, user name and password.

2 Change your Chat and Voice status to online.

3 Ensure that LiveCall feature is enabled.

LEAVING MY DESK MOMENTARILY

2 Change your chat and voice status to reflect your availability. Select Back in 5 from the list.

ENDING MY DAY

4 Release all tickets from your workspace. Ensure that tickets in your workspace are handled.

5 Select Logout from the File menu.

VISITOR HISTORY

Check your visitor's history in the Visitor list when you are in the Website view

	Visitor In Site - no history
	Repeat visitor
	Repeat visitor with chat history
⚠	Alert (LiveKeyword, Basic Visitor Rule, or other Operator Alert)

MONITOR WEBSITE

6 Select the Website view to monitor visitors browsing on your website.

7 View the Visitor list that displays information about your visitors such as the visitor history, current page, total time.

8 Access additional information about the selected visitor in the Information panel. Use the Info tab to view location information, use the Navigation and Page Viewer tabs to view previewed and referrer pages.

9 Proactively invite or engage online visitors to chat with you.

HANDLING CHAT, VOICE, EMAIL TICKETS

10 Take Chat and LiveCall requests.

11 Take Tickets when no Chat or LiveCall requests are waiting in the queue. Note that you will automatically switch to the Workspace view. This view shows the ticket list that displays the tickets that you are working on.

12 Register the visitor's contact and view the contact history that displays a list of past communication tickets.

13 Select Note, Chat, Voice, Log Call or Email in the Channel toolbar to perform an additional task while you're chatting with a customer.

14 Write emails, chat in real time or dial a number in the Communication panel.

To learn more about LivePerson Contact Center go to www.liveperson.com/help/   **liveperson**