



Live Chats

Help Documentation

Live Chats

Live Chat Settings

To access this section, click the settings icon . Then expand System Settings and Live Chats and click Live Chat Settings in the navigation pane. The live chat settings will load in the content pane and the following tabs will be available:

Options

Use this tab to edit the following settings:

- **Live Chat Requires** - To specify which role is required to use live chat, select it from the list. By default, this option is set to all users.
- **Hand Off If No Initial Response** - When a live chat comes in, but an agent doesn't respond for this amount of time, the chat will either be handed off to another agent (if Round Robin distribution is enabled) or the chat will go back to the queue.
- **Enable** - Check this box to automatically reassign live chat that do not receive an agent response.
- **Hand Off If No Follow-up Response** - If, in the middle of a chat, the agent doesn't reply to the end user within this amount of time, the chat is handed off to another agent (if Round Robin distribution is enabled) or the chat will go back to the queue. Note: An agent is considered to be inactive in a live chat if the agent has not transferred the live chat to another agent, typed in the live chat text box, or does not have the last response in the chat.
- **Enable** - Check this box to automatically reassign live chats to another agent if the original agent has not performed an action on the live chat.
- **Hand Off If Interface Closed** - If, in the middle of a chat, the agent closes the chat window, the chat is handed off to another agent (if Round Robin distribution is enabled) or the chat will go back to the queue. By default, this option is set to two minutes.
- **Enable** - Check this box to automatically reassign live chats to another agent if the original agent is away (or has closed the management interface).
- **Distribute chats via Round Robin** - Checking this box will specify whether SmarterTrack assigns chats to agents within this group automatically. For more information on the different methods, see Ticket Distribution Methods .
- **Enable agent name/alias on invitations** - Check this box to display the agent's alias on live chat invitations. By default, this option is disabled.
- **Enable files to be sent by users during live chat** - Check this box to allow users to send files to

agents via live chat. By default, this option is disabled.

- Display user comment on live chat - Agents can make comments about an particular account or user that carry over to new chats coming in from that user. For example, if a customer is on a particular server or requires special assistance, agents can note this in user comments so that anyone who takes a live chat from that customer sees the comment and can act accordingly.
- Disable live chat outside of business hours - Check this box to turn off the live chat feature outside of the business hours that were set up for the department. By default, this option is disabled. Note: Administrators will need to define the live chat hours on the Business Hours page in the Setup folder in System Settings.
- Show live chat number at the beginning of a live chat - Check this box to automatically display the live chat ID number at the beginning of each live chat session.
- Department Selection Text - The text that displays in the live chat submission form instructing customers to select the department they want to interact with.

Service Quality

Use this tab to specify the following settings:

- In Queue Sound - To specify the how often a sound notifies agents that live chats are in the queue, select the appropriate time interval from the list.
- Idle Sound - To specify the how often a sound notifies agents that they have an unanswered live chat, select the appropriate time interval from the list.
- Idle Warning After - The number of seconds an agent has not responded to a live chat message. After this threshold has been reached, the agent will receive a warning notification.
- Idle Warning Sound - To specify the how often a sound warns agents that they have an unanswered live chat, select the appropriate time interval from the list.
- Idle Critical After - The number of seconds an agent has not responded to a live chat message before the chat becomes critical. After this threshold has been reached, the agent will receive a critical notification.
- Idle Critical Sound - To specify the how often a sound notifies agents that an unanswered chat has reached the critical idle threshold, select the appropriate time interval from the list.
- Duration Warning After - The number of seconds a chat lasts before its duration sets off a warning.
- Duration Critical After - The number of seconds a chat lasts before its duration sets off a critical alert.

Translations

SmarterTrack can automatically translate live chats via Microsoft Translator or Google Translate.

Because both Microsoft and Google charge a fee for their translation service, SmarterTrack will track

how many characters and requests your server has attempted to translate to aid you in managing your translation subscription costs.

Use this tab to edit the following translation settings:

- Auto Translation Method - Select which translation service to use from the list. By default, the auto-translation method is set to none.
- API Key - For Google Translate only. The API key provided by Google. For more information on obtaining this key, see [How To Automatically Translate Live Chats](#) .
- Client ID - For Microsoft Translator only. An identifier used to represent your SmarterTrack installation. You will create the Client ID when you register your SmarterTrack installation with the Microsoft Azure Marketplace.
- Client Secret - For Microsoft Translator only. A security key that allows Microsoft Translate to interact with your SmarterTrack installation. For more information on obtaining this key, see [How To Automatically Translate Live Chats](#) .

Live Chat Links

Use this section to add live chat links to the company website. To view a list of live chat links, click the settings icon . Then expand System Settings and Live Chats and click Live Chat Links in the navigation pane. A list of live chat links will load in the content pane.

In general, the following columns are available:

- Checkbox - Use these boxes to select multiple links. Custom links must be selected before choosing an action from the actions toolbar.
- ID - The image identifier that is used in the live chat link script.
- Title - The name of the live chat link.

The following options are available from the content pane toolbar:

New - Allows you to create a new set of live chat link scripts.

Edit - Allows you to edit an existing live chat script.

Delete - Allows you to delete an existing live chat script.

Creating a New Live Chat Script

When creating a new live chat script, the following options are available from the content pane toolbar:

- Save - Creates a live chat link.

- Generate Script - Generates the script(s) that appear in the Live Chat Link Script section.
- Cancel - Cancels without saving any changes.

In addition, the live chat link settings will load in the content pane and the following tabs will be available:

Options

Use this tab to edit the following settings:

- Title - The name used to identify the live chat link you're generating. These can signify the brand you're creating the links for, the website the links will go on, or any other naming convention you choose.
- Refresh Rate - The number of seconds after which the script checks the SmarterTrack server to make sure SmarterTrack is responding and live chat is available. By default, the refresh rate is 30 seconds.
- Enable for [Department Name] - If there are multiple departments created within SmarterTrack, it is possible to select which departments will be available for live chat when using the live chat script.

Live Chat Online

Use this tab to edit the following settings:

- Display As - Select how the live chat online notification will be displayed.
- Image Link - The image to be displayed when live chat is available. (I.e., there are agents available to chat, it is within business hours, etc.)
- Description - The text displayed when a customer's mouse pointer hovers over the live chat online image.
- Anchor Title - The text available to search engine spiders that describes the live chat online link. Specifying the anchor title may improve SEO efforts.
- Navigate URL - The website URL to which customers are directed if they click on the live chat online image.
- CSS Class - The cascading style sheet class used to format the image on the company website, if there is one available. This is an optional field.

Live Chat Offline

Use this tab to edit the following settings:

- Display As - Select how the live chat offline notification will be displayed.
- Image Link - The image to be displayed when live chat is unavailable.
- Description - The text displayed when a customer's mouse pointer hovers over the live chat

offline image.

- **Anchor Title** - The text available to search engine spiders that describes the live chat offline link. Specifying the anchor title may improve SEO efforts.
- **Navigate URL** - The website URL to which customers are directed if they click on the live chat offline image.
- **Navigate Target** - The HTML code that specifies whether the URL opens in a new window or the current window. For example, `_blank` will indicate that the URL should open in a new window. This is an optional field and if left blank will open the URL in a new window by default.
- **CSS Class** - The cascading style sheet class used to format the image on the company website. This is an optional field.

Generating the Script

Once all of the tabs are filled out - options set, images in place and linked properly - it's time to actually generate your live chat scripts. To do so, click the Generate Script button in the content pane toolbar. You will be presented with the following options:

- **Host Header** - In those instances where customers are utilizing multiple brands and have host headers set up for each, a unique live chat script can be generated for each brand that is set up. Leaving this as the default means that the script will be generated for the SmarterTrack Base URL.
- **Script Type** - There are 2 script types, depending on how and when you want the live chat script to load. They are:
 - **Normal Script** - Select this option to generate a standard link script.
 - **Deferred Script** - Select this option to make your live chat links load after the rest of your website is loaded into a visitor's browser. Using a deferred script means that your entire website will still load even if your SmarterTrack portal is down. When using a normal script, the live chat links will load first, thereby potentially causing your website to fail to load if there are problems with your SmarterTrack portal.
- **Put in <HEAD> tag** - This is the actual script that will be placed on your website, between the `<HEAD>` and `</HEAD>` tags. The code should be copied and pasted exactly as it appears.
- **Put in Place of Image** - If you are not going to use an image for your online/offline status indicators, and are planning on using text only, copy and paste this script in the location where you want your live chat status to appear.

Chat Rooms

While temporary agent conversations are hosted via instant messenger, some companies may want to conduct virtual meetings with employees. In this case, the administrator may create permanent chat rooms to host agent conversations. Chat rooms allow multiple different agents to join in group-level, department-level or even company-level conversations versus the one-on-one type of conversation handled via instant messenger.

To view a list of permanent chat rooms, click the live chat icon . Then expand Chat Rooms in the navigation pane and select the type of chat room that you want to view (options include active and inactive chat rooms). Note: Administrators may need to access the chat rooms by clicking the settings icon , then expanding the System Settings and Live Chat folders in the navigation pane and clicking Chat Rooms .

Chat rooms function identically to instant messages. For more information, see Instant Messenger Overview .

Active and Inactive Chat Rooms

To view an active or inactive chat room, expand Chat Rooms button in the navigation pane, then click Active to view active chat rooms or click Inactive in to inactive chat rooms. Depending on which item is selected, a listing of all active or inactive chat rooms for which the agent has access will load in the content pane.

The following options are available from the content toolbar:

- Join - Allows the agent to join the chat room.
- Search - Allows the agent to search for a chat room.
- Refresh - Depending on the system settings, the Workspace may or may not automatically refresh itself at regular intervals. Clicking this button will force the Workspace to refresh.

By Chat Room

Agents can join a specific chat room by expanding By Chat Room in the left tree view and selecting the appropriate chat room.

Live Chat Distribution Methods

There are two basic distribution methods for live chats: the default distributon and Round Robin distribution, and the method used is determined by administrators when configuring Live Chat Settings . On the Options tab in Live Chat Settings, if the box next to "Distribute chats via Round

Robin" is checked, then that distribution method will be used. If it is unchecked, live chats will follow the default distribution model.

Default Distribution

Also known as "cherry picking," under the default distribution method, all live chats are directed to the queue and agents must manually select the live chats to participate in. This model is typically preferred by smaller companies with lower volumes of live chats.

Administrators that choose this distribution method should note the following:

- Live chats are never assigned to agents automatically.
- An audible alert will notify agents when a live chat is in the queue. The basic notification sound can be configured in the same manner as the other chat sounds.
- If there are no agents receiving live chats, the system will treat chat as offline.

Round Robin

Most companies will use this distribution method for live chats because it attempts to give all of the agents an equal percentage of the workload. Under this distribution method, each agent has a maximum number of live chats that he/she can work on at a time. When a new live chat is initiated, the system checks the active agents within the live chat group to determine which agents have not met their maximum limit. The live chat is then assigned depending on the number of live chats the agent is working on and the amount of time that has passed since a live chat was last assigned to the agent.

For example, assume a company has three agents, Joe, Bob, and Sue. Sue is very experienced and can handle up to five chats at once. Joe and Bob are relatively new, and can handle one and two simultaneous chats at once. If none of the agents are engaged in a live chat when a new live chat is initiated, the system will perform the following checks to determine which agent will receive the live chat:

- The system will first check to see who has the lowest percentage of capacity.
- The system then checks to see which agents have the lowest number of live chats.
- Finally, the system checks to determine which agent has the earliest Last Chat Ended time.

So in the example above, the agents with the lowest percentage of capacity are Sue, Bob, Joe. All of the agents have the same number of live chats (none), but the most time has passed since Joe participated in a live chat. Therefore, the system will assign the live chat to Joe.