



Quick Start Guide

Installation and Setup

Introduction

Velaro's live help and survey management system provides an exciting new way to engage your customers and website visitors. While adding any new technology to your online business may seem daunting, Velaro's solution has been created so that even the most novice user can integrate live help into their web site. Getting started with Velaro is quick and easy, and in most cases you will be able to offer live help within 15 – 20 minutes. This guide will walk you through the steps required to have Velaro up and running on your web-site. Although this quick start will provide you access to a very robust chat solution in a matter of moments, we recommend you take a look at Velaro's advanced customization features at a later point. Velaro's comprehensive branding and workflow options let you completely manage the way Velaro looks and acts so that it will fit perfectly into your business process.

Getting started

1. Create your Velaro account

Before you can begin using Velaro, you must create your account. If you have not already done so, open your web browser, and navigate to Velaro's corporate web site, located at <http://www.velaro.com/velaro-free-trial>, and sign up for your free trial. The free trial button is located on the bottom of every web page.

2. Log in to the Velaro Control Panel

The Velaro Control Panel is the main interface for setting up and configuring your Velaro account. After you have created your account, you can log in to the control panel any time by starting a web browser, and navigating to:

<http://cp.velaro.com>.

Login

Login Name

Password

Sign In

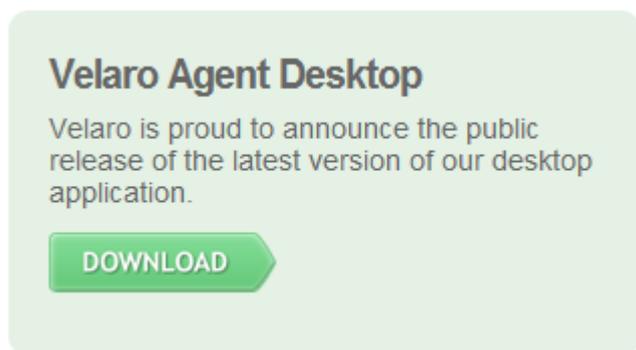
Remember My Login?

[Forgot Password?](#)

3. Download the Velaro Desktop Client

The Velaro Desktop Client application must be installed on your desktop. This is a powerful application that lets you monitor your web site visitors in real-time, receive incoming chat requests, and chat with your visitors.

To download the Velaro Desktop Client Go to <http://cp.velaro.com>



You can also download the application by launching a web browser and navigating to:

<http://downloads.velaro.com/velaro.exe>

Download and save the application to your computer's local desktop.

4. Install the Velaro Desktop

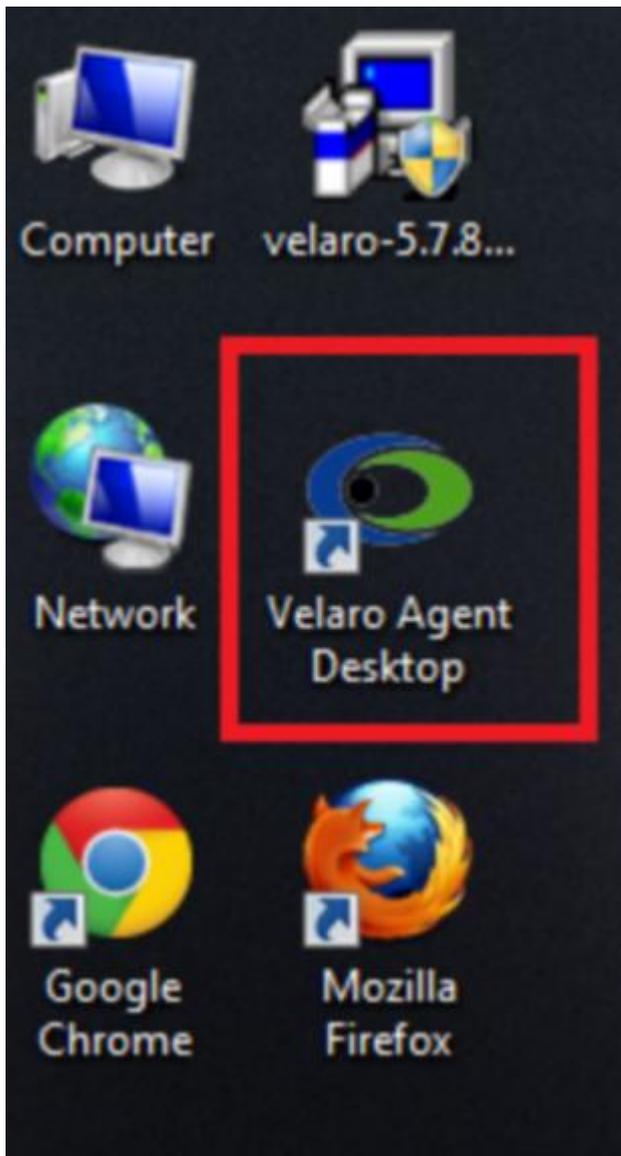
After the download is complete, double click the icon on your desktop for installation to commence. If you did not download the application to your local desktop, you must find the application using Windows File Explorer first.

After the installation is complete, a Velaro icon will be installed on your desktop, and within your Windows Start menu.

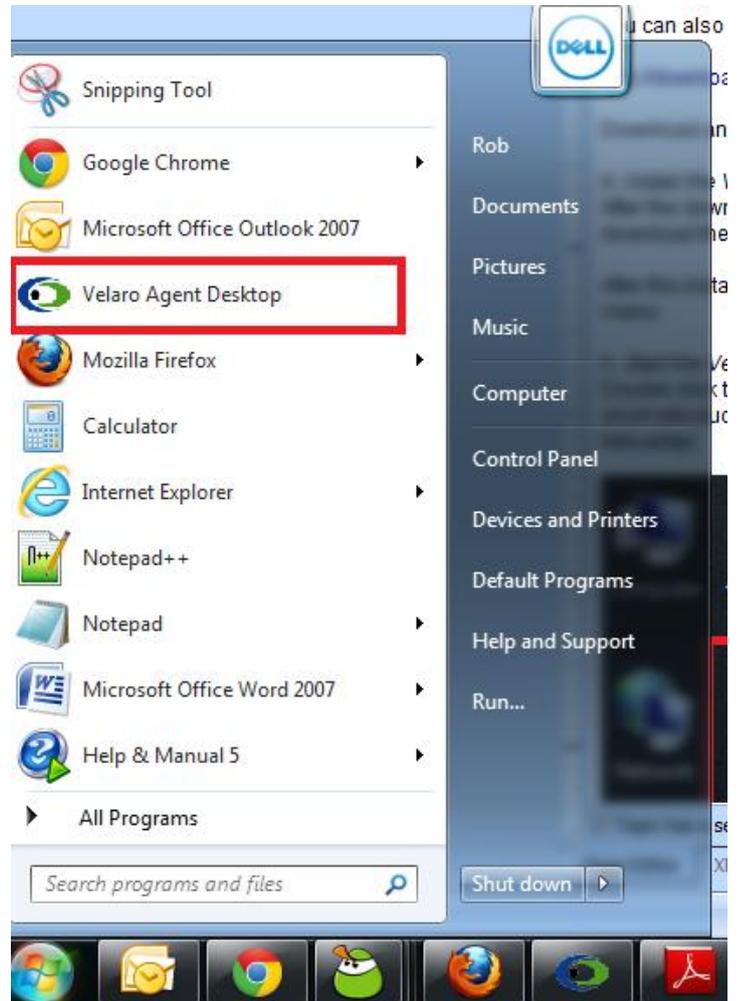
5. Start the Velaro Desktop Application

Double click the Velaro icon on your desktop, or select Velaro Agent Desktop from your Windows Start menu.

Desktop Icon



Start Menu Icon

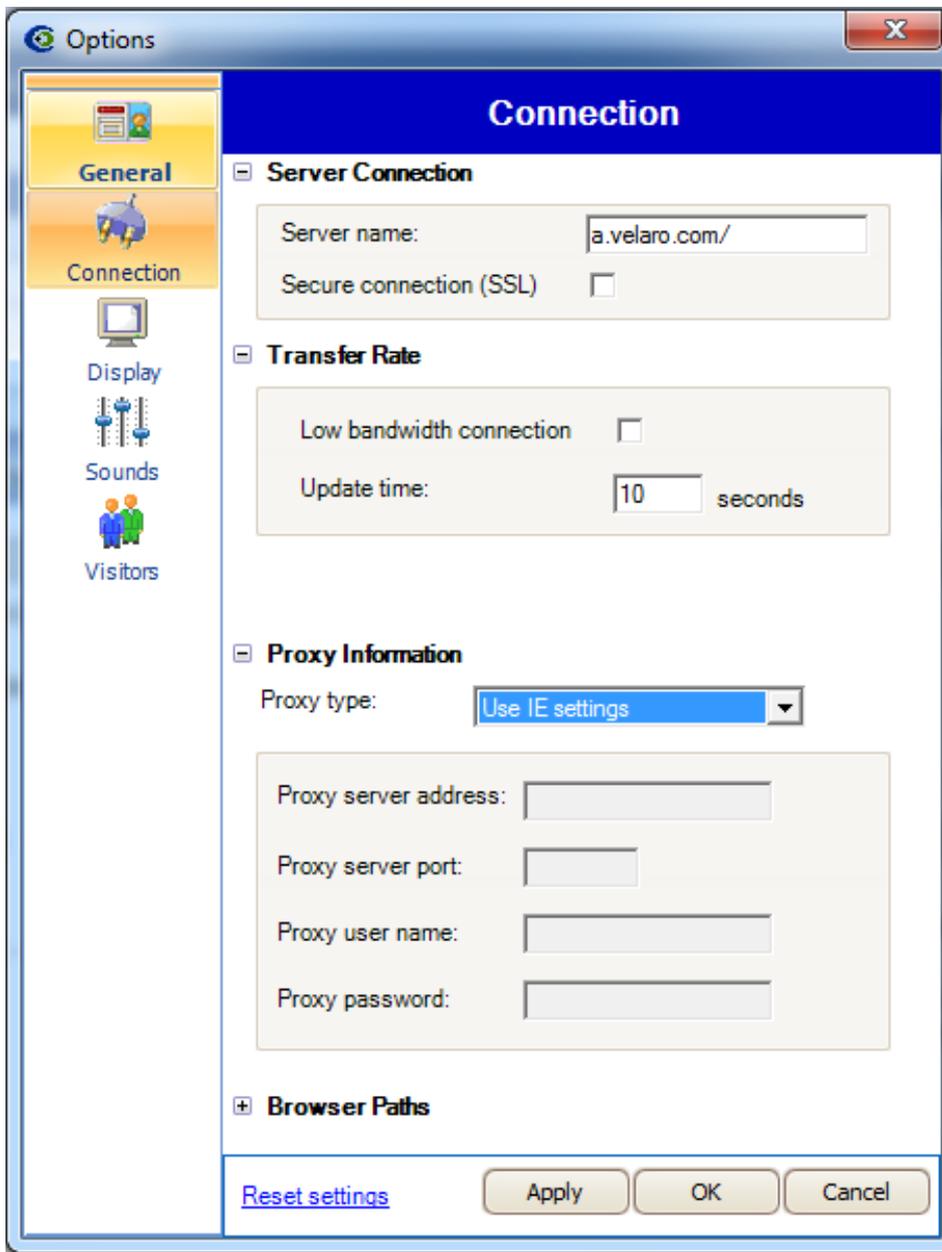


6. Ensure your connection settings

If your computer is connecting to the Internet via a web based proxy server, you must configure Velaro to communicate through the proxy as well.

A) From the application's main menu, select **Tools>Options**.

B) Select the Connection tab from the set dialog:



D) Select **Use Proxy**, and change the option from No to Yes. If you use Windows Internet Explorer, you can also select IE Settings.

E) Enter the proper proxy server address, and port number. If your proxy requires authentication, additionally enter the user name and password required to access the proxy server. *Note: This is not the location for entering your Velaro user name and password. You may need to contact your network administrator if you do not know what values to place here. Typically, they are the same username and password necessary to log on to your computer.*

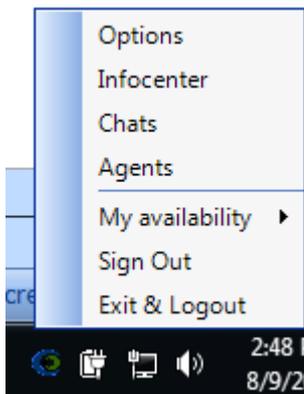
F) Click **OK** to return back to the main application window.

7. Log in to the Velaro service

Click the Login button from the main toolbar. You are presented to enter your Velaro account information: Enter the Velaro user name and password that you chose when creating your Velaro trial account.



Once you have successfully logged into the Velaro service, the Velaro icon is displayed in your Windows Taskbar.

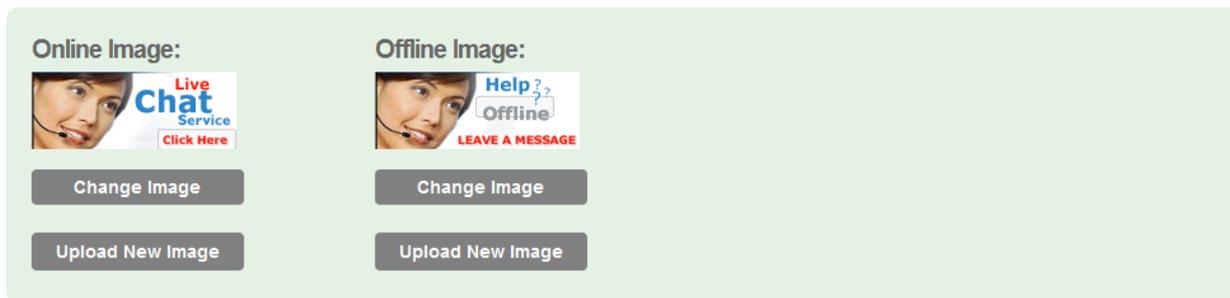


Congratulations! You are now successfully logged into Velaro and ready to receive chats from your visitors. However, you aren't quite finished. Now you need to add a button to your web site that lets visitors chat with you.

Uploading Images

8. Choose your live help buttons

- A) Ensure that you are still logged into the Velaro Control Panel with your web browser.
- B) Select **Install** from the main menu.
- C) Select **Chat Buttons** from the sub-menu options.
- D) At the bottom of the page are the images that will be used for when agents are Online and Offline. Select **Upload New Image** to add an image from your library to the Image Gallery, or select **Change Image** to select from our community images, or images you've already uploaded.



Adding Live Chat Buttons to your Website

9. Generate HTML to add to your site

After you have chosen the buttons, the HTML is automatically generated above.

Click-to-Chat

Working on:

paste the following code in to your web pages to display your button

[Edit Click-to-Chat](#) | [Edit Click-to-Call](#)

```
<table cellpadding="0" cellspacing="0" border="0"><tr><td align="center"><a href="http://v.velaro.com/visitor/requestchat.aspx?siteid=79258&showwhen=inqueue" target="OnlineChatSoftware" onclick="this.newWindow = window.open('http://c.velaro.com/visitor/requestchat.aspx?siteid=79258&showwhen=inqueue', 'OnlineChatSoftware', 'toolbar=no,location=no,directories=no,menubar=no,status=no,scrollbars=no,resizable=yes,replace=no');this.newWindow.focus();this.newWindow.opener=window;return false;"></a></td></tr><tr><td align="center"><font size="1" face="Arial"><a href="http://www.velaro.com/Online+Chat+Software?cid=146" target="Velaro" style="text-decoration: none"><font color="black">OnlineChatSoftware<br>by</font><b><font color="#000080">Velaro</font></b></a></font></td></tr></table>
```

Copy to Clipboard

- A) Select **Copy to Clipboard** to copy the HTML into your Windows clipboard memory.
- B) Load the HTML editor that you use to manage your website pages, and select the pages you would like to offer live help on.
- C) Ensure that you are viewing the HTML source of each page and locate the location where you would like the live chat button to be displayed. You may also paste the same script in more than one place per page, if you'd like your live chat button to be more prominent.
- D) Move your cursor to that location and press CTRL-V to paste the HTML code generated from the Velaro control panel into each page you would like to offer live help.
- E) If your web-site allows, you should view the updated pages before deploying them to your production server when viewing your page, the new live help button is displayed. You can click this button and initiate a chat with yourself if you are currently logged into the Velaro Desktop Client application.

Adding Visitor Monitoring

Visitor Monitoring

Paste the following code in to your web pages to add advanced visitor monitoring to your web site:

```
<div id="if_div_invite" name="if_div_invite" style="display:none;position:absolute;left:0px;top:0px;width:0px;height:0px;">
<iframe name="if_frame_invite" id="if_frame_invite" frameborder="0" src="about:blank"
style="width:100%;height:100%;border:none;" allowtransparency="true" scrolling="no"></iframe></div>
<!-- Velaro WebLink Code -->
<script type="text/javascript">
var pt='http';
var qs=escape(window.location.search);
var ti=new Date();
if(location.href.substr(0,5).toLowerCase()=='https') pt='https';
var ed = new Date();
ed.setHours(23); ed.setMinutes(59); ed.setSeconds(59);
ed.setFullYear(ed.getFullYear()+1);
var la=""; if (navigator.appName == 'Netscape') la=navigator.language; else la=navigator.systemLanguage;
var pn = ""; //&pn="+location.pathname; // set to a human readable pagename if desired
var rm = escape(window.document.referrer);
```

Copy to Clipboard

Modify the above script to your individual needs:

Department ASP Pages Security (SSL) Transactions Cookies

Velaro's visitor monitoring lets you segment your web site using departments. You can designate each portion of your site as a specific department. When visitors are on a web page with the above script, for which department should they be categorized?

None

A) Navigate to **Install>Visitor Monitoring**

B) In the HTML editor that you use to manage your web site, select the pages where you wish to add advanced visitor monitoring. If you would like advanced visitor monitoring to be enabled, you need to add it to each page you wish to monitor.

C) View the HTML source for each of the selected pages.

D) Navigate the editor to the bottom of each HTML page, and place your cursor immediately before the **</BODY>** tag.

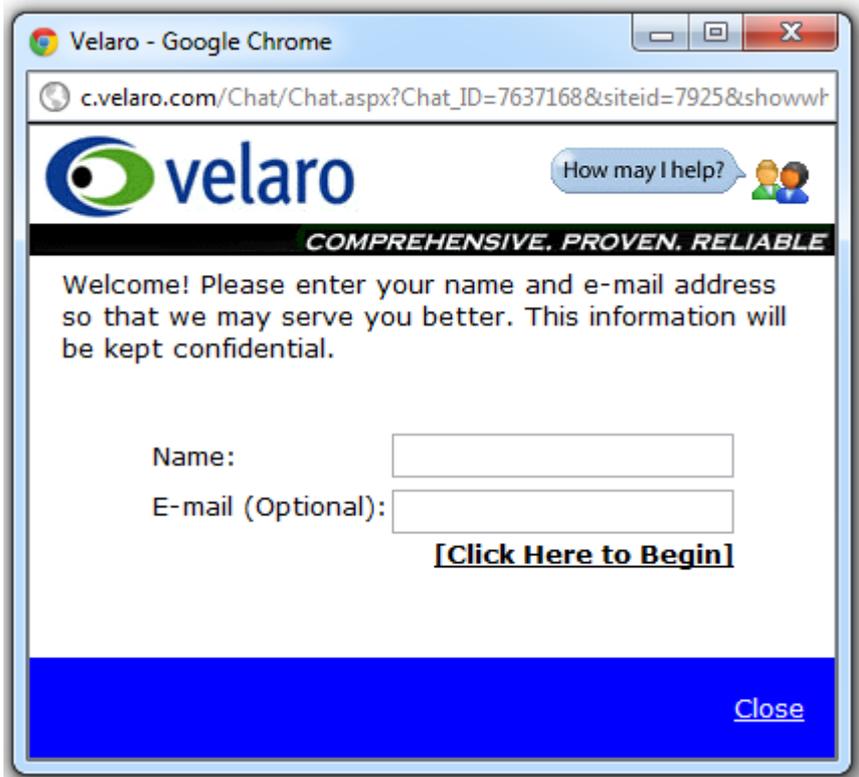
E) Press **CTRL-V** to paste the selected JavaScript into the page.

F) Save your changes to the HTML pages you have modified, and view them locally before deploying to your production web site.

Congratulations! You have now added live help to your web site. At this point, you are ready to start chatting with your site visitors. You may stop reading this quick start guide. However, if you would like to set up some basic customization to make the visitor's chat window look more like the rest of your website, you may continue on to the next section.

Adding Header Image

Velaro provides the most comprehensive customization options on the market today. Within the Velaro control panel, you can completely change the look and feel of nearly every aspect of the chat window displayed to your web site visitors. While this section explains configuring key options, we encourage you to navigate within the Control Panel and look at all the customization Velaro provides. When the Velaro chat window is displayed to your visitors, it initially looks much like the following generic window:



10. Change the header image

The header image provides you the ability to display your corporate brand or logo throughout the visitor's chat session.

- A) Create your custom header image. The default image size should be 400 pixels wide and 65 pixels high (400x65.)
- B) Select **Install>Image Gallery**
- C) Select **Settings>Design**
- D) Select **Account Images> Banners** from the Image Gallery navigation.
- E) Upload your newly created header image by filling out the **Submit section** on the left hand side of the page.

Upload an Image

Upload an image to the currently selected gallery. Select a file from your desktop:

Browse...

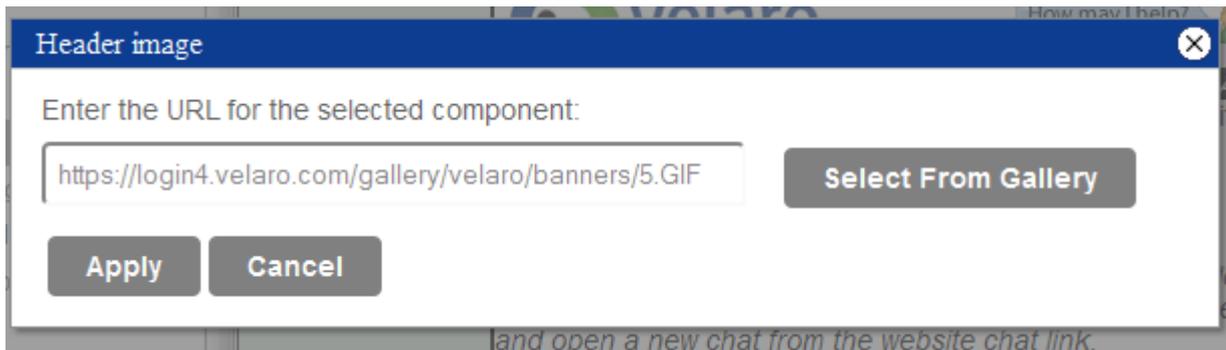
Submit

F) Your header image is now on the Velaro server. You now need to change the default image to point to your newly uploaded image.

G) Select **Settings>Design** from the main menu.

H) Click **Header Image** from the list of configurable options located to the right of the default form.

I) select the header image you want to use by clicking **Select from Gallery**. This image is used in all forms except for the actual chat window. You can also enter the URL of a file accessible from the web.



Header image

Enter the URL for the selected component:

Select From Gallery

Apply Cancel

How may I help?

and open a new chat from the website chat link.

J) Click **Apply**

Remember to evaluate all of Velaro's customization capabilities. This quick start guide only touches the surface of all the different features and options available to you.

Customer Support

Velaro customers receive unparalleled service and support. To receive support, you can visit the Velaro web site at <http://www.velaro.com>. Select the Support options to participate in the Velaro public forums, access the Velaro Knowledge Base, send us an e-mail, call us, read our Frequently Asked Questions, or chat live with us now!

E-mail sales: sales@velaro.com

E-mail customer support: support@velaro.com

Call us (9am - 8pm EST): 800.9VELARO (800-983-5276) option 1 for Sales, option 2 for Support, option 3 for Billing