



Velaro Web Agent Guide

© 2012 Velaro

1 Introduction

The Velaro Web Agent End User's Guide. This guide should be used by your team members that are responsible for logging into the Velaro account.

This manual provides you with instructions on how to login and receive chats with the Velaro Web Agent on a daily basis.

This manual covers features of interest to agents of the Velaro Web Agent version 7.0

1.1 Copyrights and Trademarks

Velaro Web Client End User Guide

© 2011 Velaro, Inc.

All rights reserved. No parts of this work may be reproduced in any form or by any means - graphic, electronic, or mechanical, including photocopying, recording, taping, or information

storage and retrieval systems - without the written permission of the publisher.

Products that are referred to in this document may be either trademarks and/or registered trademarks of the respective owners.

The publisher and the author make no claim to these trademarks. While every precaution has been taken in the preparation of this document, the publisher and the author assume no responsibility for errors or omissions, or for damages resulting from the use of information contained in this document or from the use of programs and source code that may accompany it. In no event shall the publisher and the author be liable for any loss of profit or any other commercial

1.2 System Requirements

The Velaro Web Agent a web based application. The Web Agent requires your site to be updated to Velaro 7.0 containing the code pulled from our new Control Panel at cp.velaro.com.

1.3 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

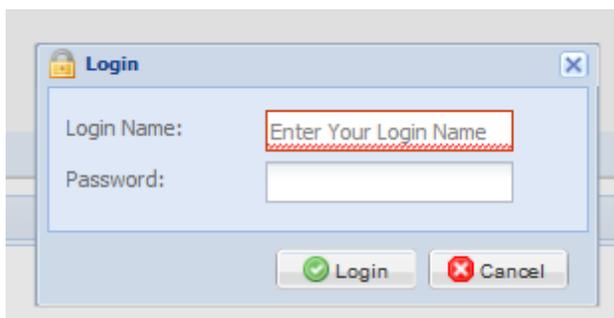
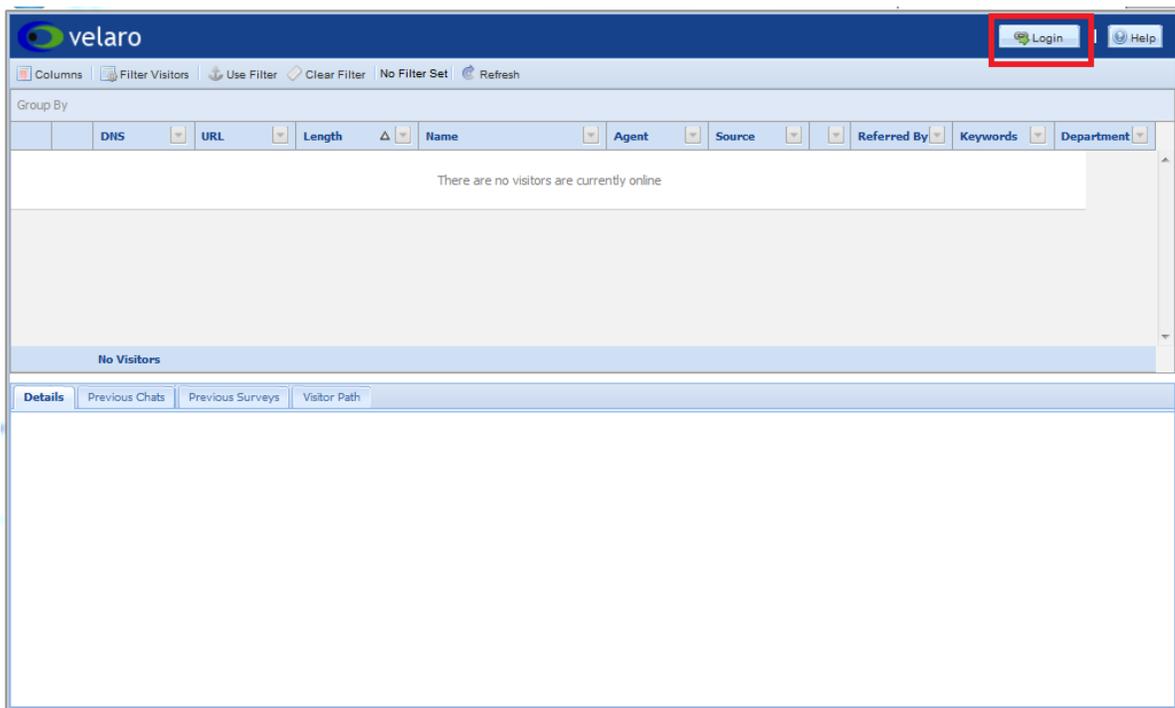
2 Getting Started

To begin using the Velaro Web Agent, open a web browser and navigate to the following web address:

<https://agent.velaro.com/>

2.1 Logging In

Select **Login** from the main menu and users will be presented with the Agent Login window:



Login name - Enter agent's user name (either created by the user or assigned by the administrator)*

Password - Enter your password*

*Both user names and passwords are case sensitive

Login - After filling out the necessary information in the Login Name, Password, and Server address fields, click this button to log into the Velaro service.

Cancel - Click this option to cancel the login process and close this window.

3 Monitoring Visitors

The main application window provides real-time insight into your current website traffic. By providing your agents with this information they can see where the visitors are coming from, what page they are currently on, do things such as proactively invite visitors to chat, and much more. By default, your visitor monitoring screen looks like this:

DNS	URL	Length	Name	Agent	Source	Referred By	Keywords	Department
74-93-220-38-was	http://a.velaro.cor	00:00:31	5651					
74-93-220-38-was	http://a.velaro.cor	00:00:37	barry					
74-93-220-38-was	http://a.velaro.cor	00:03:36						
ausisaw2k3pc111-	file:///C:/Documer	00:42:51						
tan7.ncr.com (192	http://ncrdirect-te	01:50:29						
tan7.ncr.com (192	http://ncrdirect-te	03:08:17						

6 Visitors

Details john test Previous Chats Previous Surveys Visitor Path

Demographics

74-93-220-38-washingtondc.hfc.comcastbusiness.net (74.93.220.38)
Comcast Business Communications

Location: Elkridge, MD 21075 (410)
Country: United States
ISP: -unknown-
Name: barry
E-mail: im@wesona

Referred By

Site: Rob's test site (7925)
Source:
Keywords:
Referral URL:

Extra Information

mytext: 345
whatsyourquestion:: Who is number one

The visitor monitoring screen consists of 3 main areas:

Menus and Toolbars - At the top of the application you have access to the menus and toolbars that provide navigational access to all of Velaro's features and capabilities. Depending on your focus, the buttons available on the toolbar will change to match your current context.

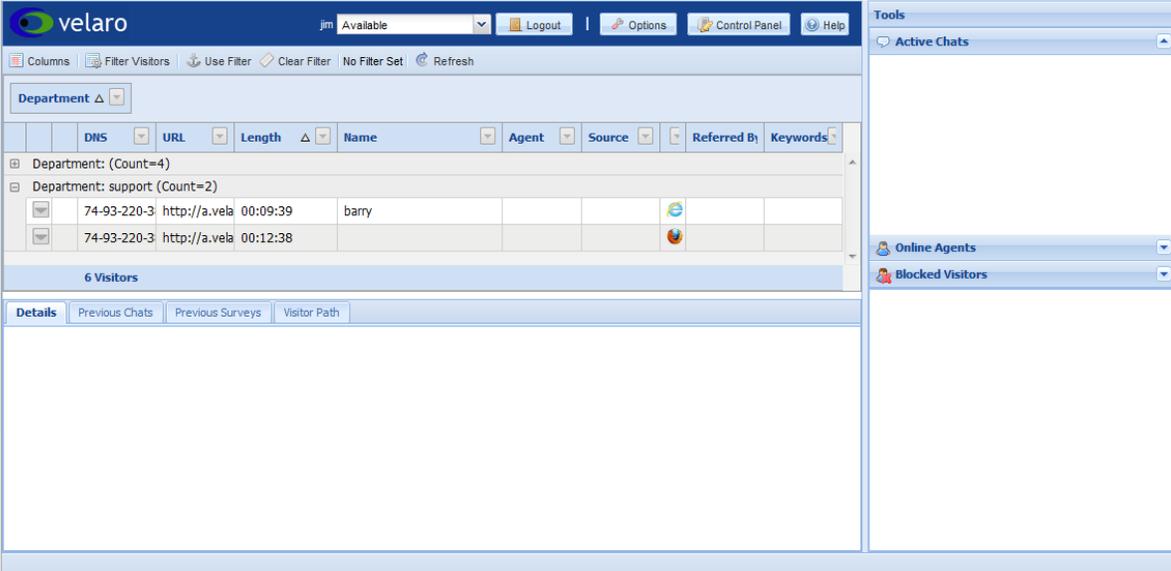
Current Visitors - The list of all visitors that are on your website. This list is highly customizable and simple to manage. By selecting an individual visitor within the list, you have access to a wide range of additional information.

Information Tabs - All the other tabs displayed in the window derive their content from the currently selected visitor. As with the Current Visitors list, you have many customization options that let you define your preferred layout and display of all this additional information.

3.1 Customizing the Layout

Grouping

The Velaro Web Agent provides a wide variety of information. Any column within the **Visitor tab** can be selected and placed in the section below the **Visitor tab** labeled "**Drag a column header here to group by that column**". Once a column is added to this section, all visitors will be grouped together. There is no limit to the number of columns that can be grouped together. By dragging multiple columns to the grouping section, visitors can be viewed in any hierarchical organization. Below is an example of visitors grouped by the **Department** column:



The screenshot shows the Velaro Web Agent interface. The top navigation bar includes the Velaro logo, user 'jim', status 'Available', and buttons for Logout, Options, Control Panel, and Help. Below the navigation bar, there are tabs for Columns, Filter Visitors, Use Filter, Clear Filter, No Filter Set, and Refresh. A dropdown menu for 'Department' is open, showing a list of departments. The main content area displays a table of visitors grouped by Department. The table has columns for DNS, URL, Length, Name, Agent, Source, Referred By, and Keywords. The data is organized into a hierarchy: Department (Count=4) > Department: support (Count=2) > Individual visitor rows. The bottom of the interface shows a '6 Visitors' summary and tabs for Details, Previous Chats, Previous Surveys, and Visitor Path. On the right side, there are toolbars for Active Chats, Online Agents, and Blocked Visitors.

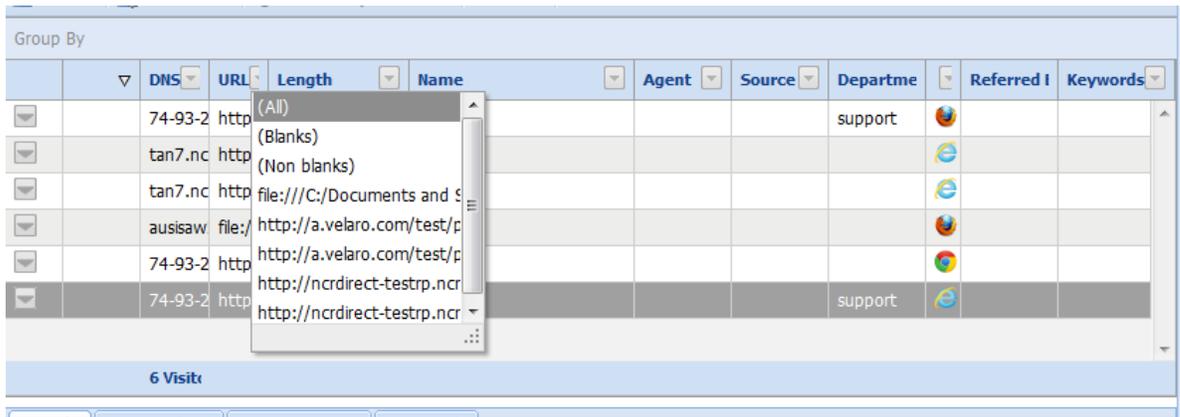
	DNS	URL	Length	Name	Agent	Source	Referred By	Keywords
Department: (Count=4)								
Department: support (Count=2)								
	74-93-220-3	http://a.vela	00:09:39	barry				
	74-93-220-3	http://a.vela	00:12:38					

Sorting

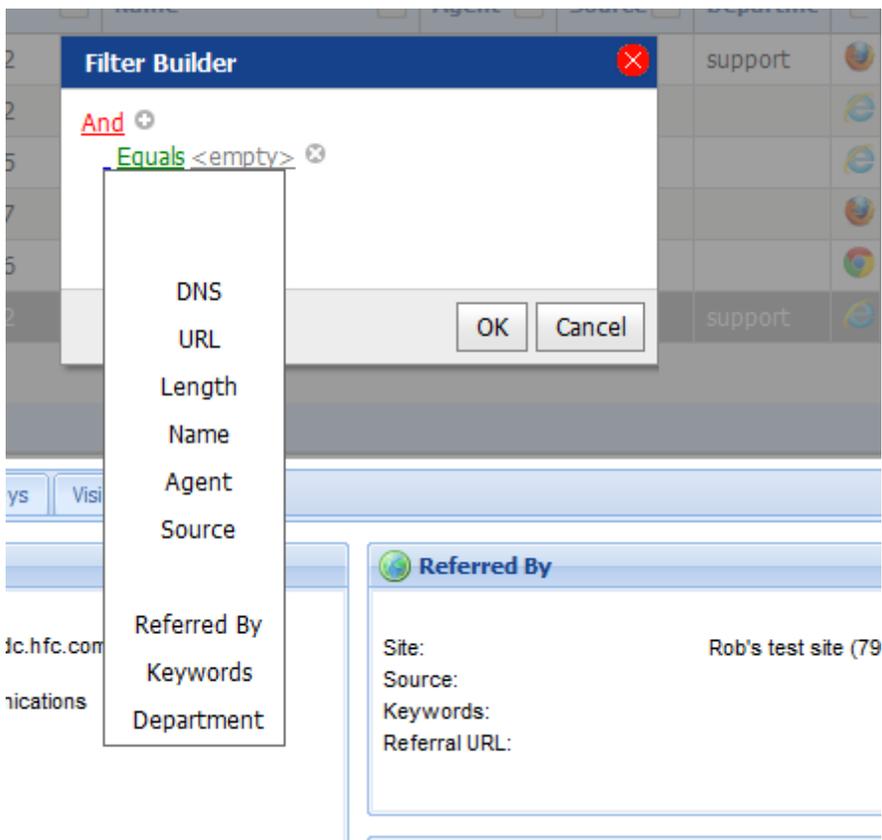
Visitors displayed within the application may be sorted in ascending or descending order. To sort visitors, simply click on any column header. Clicking a column the first time will organize visitors in ascending order, clicking on the same column a second time will re-sort the visitor display in descending order.

Filtering

For websites that receive lots of daily traffic or if a specific visitor needs to be found the Web Agent provide the ability to create realtime filters to display only those visitors in which the agent is interested in viewing. To activate a filter, simply select the **Filter Visitors** button to the right of the column selection. The following options will be presented:



Custom filters can be created by selecting the **Filter Visitors** button.



Selecting columns

All columns do not need to be displayed in the visitor list. To customize the view simply click on the Columns button to view the customization menu. Here you will be able to add or remove columns from the Visitor Tab.



This displays the list of columns.

To Add columns to the visitor list, select on the column name and drag it to the area in the visitor list where you want it to be displayed, this adds the column to the visitor list.

To remove a column from the visitor list, click on the column heading and drag it to the customization box. This removes the column from the visitor list and adds it to the customization box.

Removed columns can be added back to the visitor list. To add removed items back click on the column name in the customization box and drag it to the visitor list to add it back.

3.2 The Visitor List

The Visitor list offers a quick overview of all the visitors who are visiting the site as well as those who have initiated a chat. This window will display the visitor status, DNS, company name, the browser which the visitor is using, the URL they were referred from, the length of time the visitor has been on your site, the number of chat requests made by the visitor, the visitor name, the agent who assisted the visitor, the source they were referred from and keywords that the visitor entered in his request.

The screenshot shows the Velaro interface with a visitor list table and a details panel. The table has columns for DNS, URL, Length, Name, Agent, Source, Department, Referred By, and Keywords. The details panel shows Demographics and Referred By information for a visitor.

DNS	URL	Length	Name	Agent	Source	Department	Referred By	Keywords
74-93-220-38-washingtondc.hfc.comcastbu	http://a.velaro.com/test/page1.asp?SiteId=75	00:26:22				support		
tan7.ncr.com (192.127.94.7)	http://ncrdirect-testrp.ncr.com/ProductList/Cc	03:31:02						
tan7.ncr.com (192.127.94.7)	http://ncrdirect-testrp.ncr.com/UK/NCROnline	02:13:15						
ausisaw2k3pc111-dmz.aus.amer.del.com (1	file:///C:/Documents and Settings/meenakshi	01:05:37						
74-93-220-38-washingtondc.hfc.comcastbu	http://a.velaro.com/test/page1.asp?SiteId=75	00:23:16	5651					
74-93-220-38-washingtondc.hfc.comcastbu	http://a.velaro.com/test/page1.asp?SiteId=75	00:23:22	barry			support		

6 Visitors

Details john test Previous Chats Previous Surveys Visitor Path

Demographics

74-93-220-38-washingtondc.hfc.comcastbusiness.net (74.93.220.38)
Comcast Business Communications

Location: Elkridge, MD 21075 (410)
Country: United States
ISP: -unknown-
Name: 5651
E-mail: test

Referred By

Site: Rob's test site (7925)
Source:
Keywords:
Referral URL:

Extra Information

tv show: Fringe

If an agent clicks on a visitor they can request a chat, join an ongoing chat, accept a chat, reject a chat or block a visitor by selecting the column on the far left with the down arrow option. If any of these options are grayed out, it is because that action may have already been performed. For example, if a visitor is already chatting with an agent, the only options available would be join the chat or to block visitor. Similarly, the accept chat option is enabled only when a visitor has requested a chat and is waiting for an agent to respond.

The screenshot shows the Velaro interface with a visitor list table. A context menu is open over the visitor with ID 5651, showing options: Request Chat, Request Cobrowse, Accept Chat, Accept Click-To-Call, Reject Chat, and Block.

DNS	URL	Length	Name	Agent	Source	Department	Referred By	Keywords
74-93-220-38-washingtondc.hfc.comcastbu	http://a.velaro.com/test/page1.asp?SiteId=75	00:28:22				support		
tan7.ncr.com (192.127.94.7)	http://ncrdirect-testrp.ncr.com/ProductList/Cc	03:33:02						
tan7.ncr.com (192.127.94.7)	http://ncrdirect-testrp.ncr.com/UK/NCROnline	02:15:15						
ausisaw2k3pc111-dmz.aus.amer.del.com (1	file:///C:/Documents and Settings/meenakshi	01:07:37						
74-93-220-38-washingtondc.hfc.comcastbu	http://a.velaro.com/test/page1.asp?SiteId=75	00:25:16	5651					
74-93-220-38-washingtondc.hfc.comcastbu	http://a.velaro.com/test/page1.asp?SiteId=75	00:25:22	barry			support		

Request Chat
Request Cobrowse
Accept Chat
Accept Click-To-Call
Reject Chat
Block

To Access the Visitor Options:

1. Select the visitor by clicking on the visitor's details row in the table.
2. Click on down arrow on the far left column of the Visitor Details in the Visitor List.
3. Select action from the Visitor Menu.

Column Descriptions:

1. The first column is the previously described Visitor options drop down.
2. The second column will display the visitor's status with an icon to signify whether the visitor is browsing the site, initiated a chat request, whether the agent initiated a chat request, if they are currently involved in a chat or whether their chat request was missed. Hover over the icon to see the visitors status. The visitor list can be sorted by status.
3. The **DNS** column displays the visitor's ip address and the DNS details
4. The **Browser** displays an icon to signify which browser the visitor is using
5. The **URL** displays the URL of the page of the website that the visitor is currently browsing
6. The **Length** column displays the amount of time the visitor spent on the website
7. The **Visitor** column displays the Visitor's name. This is provided by the visitor when he or she initiates a chat
8. The **Agent** column displays the name of the agent who is chatting with the visitor
9. The **Source** column displays the source of the chat
10. The **Referred by** displays the URL from which the visitor was referred to the website
11. The **Keywords** displays keywords that the visitor entered which referred him/her to the website
12. The **Department** displays the visitors current department according to the visitor monitoring script

3.3 Visitor Summaries

Visitor summaries can be viewed through the **General** tab of the Velaro Web Agent. Select any visitor name to view more information about them:

The screenshot displays the Velaro web analytics interface. At the top, the user is identified as Rob Seeley, with a status of 'Available'. The interface includes navigation options like 'Logout', 'Options', 'Control Panel', and 'Help'. Below this, there are controls for columns, filters, and refreshing the data. A table lists visitors with columns for DNS, URL, Length, Name, Agent, Source, Referred By, Keywords, and Department. One visitor is highlighted as 'Selected Visitor' with a red border. Below the table, there are tabs for 'Details', 'Previous Chats', 'Previous Surveys', and 'Visitor Path'. The 'Details' tab is active, showing two main sections: 'Demographics' and 'Referred By'. The 'Demographics' section includes fields for Location (Jersey City, NJ), Country (United States), ISP, Name, and E-mail. The 'Referred By' section shows the source as Google and includes fields for Site, Source, Keywords, Referral URL, New visitor today, and Returning visitor (before today). An 'Extra Information' section at the bottom shows a unique identifier: x-bluecoat-via: 32F73F854477E86A.

DNS	URL	Length	Name	Agent	Source	Referred By	Keywords	Department
173-161-221-5-Ph	https://login.velaro	00:05:08						Control Panel
165-88-111-99.pe	http://www.velaro	00:09:48						Sales
65-121-228-201.d	https://login.velaro	00:10:25				https://login.velaro		Control Panel
192.193.216.220	http://www.velaro	00:10:59			Google	http://www.google	velaro	Sales
74-93-220-38-Wat	http://www.velaro	00:12:58	test	Eric,Derrick H,Pau				Sales
webmail.northwire	https://login.velaro	00:17:00	Amy Brain			https://login.velaro		Control Panel
136.166.250.100	https://login.velaro	00:21:30				https://login.velaro		Control Panel
rtr.usxpress.com	https://login.velaro	00:21:48						Control Panel

Demographics

(192.193.216.220)
-unknown-

Location: Jersey City, NJ (201)
Country: United States
ISP: -unknown-
Name: -unknown-
E-mail: -unknown-

Referred By

Site: Velaro Master Account (1)
Source: Google
Keywords: velaro
Referral URL: <http://www.google.com/search?hl=en&source=hp&q=vel...>
New visitor today: Yes
Returning visitor (before today): No

Extra Information

x-bluecoat-via: 32F73F854477E86A

Sections Summary:

1. **Demographics:** Displays the visitor's IP address, city, and country they are browsing from. This section will also contain the internet service provider, the visitor's name and e-mail address (if known from a previous or recent chat).
2. **Referred By:** Displays the source from which the visitor was referred to the website, the keywords which referred him and the referral URL.
3. **Extra Information:** Displays any extra information available about the visitor. This could be a username, a forwarded ip status or a fax number or any other custom information your organization wishes agents to view.

3.4 Previous Chats

After a visitor is selected, an agent may click on the **Previous Chats** tab. This tab provides the transcripts of all previous chats originating from that particular DNS for easy reference. Chats viewed here could possibly be with different visitors but belonging to the same company, and/or originating from the same DNS. The chat transcripts include the date and timestamps, the names of the agents and the visitors who participated in the chat.

Note: When there are no previous chats the window will display "No Previous Chats"

The screenshot displays a web interface for monitoring visitors. At the top, there are tabs for 'Details', 'john test', 'Previous Chats', 'Previous Surveys', and 'Visitor Path'. Below these is a 'Refresh' button and a 'Chat Transcript' section. The transcript is organized by date, with sections for November 1, 2011; October 27, 2011; October 25, 2011; and October 20, 2011. Each date section lists chat messages with a time and a brief description. The detailed transcript on the right shows a conversation between an agent named jim and a visitor named John Doe. The transcript includes the start time (10:11 am), length (00:33:07), and the agent's name (jim). The messages are as follows:

Time	From	Text
10:31:24 am	Notice	Referred By:
10:31:24 am	Notice	MyText: 345
10:31:24 am	Notice	Whatisyourquestion: Who is number one
10:31:24 am	Notice	AgentName: Brieana Drew
10:31:25 am	Notice	mytext: 345
10:31:25 am	Notice	whatisyourquestion:: Who is number one
10:31:25 am	Notice	Room ID: 185dd6c0-0351-49c5-9501-8dd6f64ea780
10:31:25 am	rob	your ticket is 8943988
10:31:25 am	rob	Hello, John Doe. Can I help you with anything today?
10:32:18 am	Notice	jim joined session.
10:32:37 am	Notice	rob exited session.
10:32:47 am	jim	Hello

Previous Chats Details:

- All chats are organized by day and time
- The Chat Transcript provides more details about the chat like the start time, end time and length of chat.
- Chat summary can be viewed by clicking on the + sign or double clicking on it.

3.5 Previous Surveys

All previous visitor surveys can be viewed through the Web Agent. All survey types will be listed here including: post chat, pre chat, and any other custom survey created within the Control Panel. All survey information will be grouped and displayed based on a visitor's DNS. This information is great to reference while chatting with a visitor. Select any survey from the left preview pane and the survey transcript will be displayed in the center pane.

The screenshot displays the Velaro web analytics dashboard. At the top, there is a navigation bar with the Velaro logo, user information (jim, Available), and buttons for Logout, Options, Control Panel, and Help. Below this is a toolbar with options like Columns, Filter Visitors, Use Filter, Clear Filter, No Filter Set, and Refresh. The main area shows a table of visitors with columns for DNS, URL, Length, Name, Agent, and Source. A red box highlights a specific visitor entry: 74-93-220-38-washingtondc.hfc.comcastbu, http://a.velaro.com/test/page1.asp?SiteId=79, 01:21:40, John Doe. Below the table, there are tabs for Details, Previous Chats, Previous Surveys, and Visitor Path. The 'Previous Surveys' tab is active, showing a list of surveys on the left and a detailed view of a 'Postchat Survey' submitted on Monday, May 09, 2011 10:18:36 AM. The survey details table is as follows:

Question	Answer	Required
AgentName	dummy	false
visitor_name	posdt chat	false
question	tasvfo	false
answer	this is the post chat survey	false

At the bottom of the survey details section, there is a red label 'Survey Details'. The left sidebar shows a list of surveys from May 27, 2011, May 26, 2011, May 9, 2011, March 14, 2011, and February 17, 2011. A red box highlights the survey details table and the 'Survey Details' label.

3.6 Website URL Navigation

When selecting the **Visitor Path tab** details about the visitor's browsing activity on your website will be displayed. This section provides a list of all of the pages of your website which the visitor has navigated to during this browsing session and in the past. You will also be able to view how much time was spent on each individual page, as well as which page they are still on. Each URL is displayed so agents can easily select a page for quick reference during the chat. To refresh the visitor's browsing path simply select the **Refresh** option located in the lower left corner of the page.

The screenshot shows the Velaro web analytics interface. At the top, there's a header with the Velaro logo, user name 'Rob Seeley', status 'Available', and buttons for 'Logout', 'Options', 'Control Panel', and 'Help'. Below the header, there are navigation options like 'Columns', 'Filter Visitors', 'Use Filter', 'Clear Filter', 'No Filter Set', and 'Refresh'. The main area displays a table of visitors with columns for DNS, URL, Length, Name, Agent, Source, Referred By, Keywords, and Department. One visitor is highlighted with a red box and labeled 'Selected Visitor'. Below the table, there's a 'Visitor Path' section with a 'Refresh' button and a table showing the sequence of pages visited by the selected visitor.

DNS	URL	Length	Name	Agent	Source	Referred By	Keywords	Department
65.255.37.195	http://www.velaro	00:00:37			Google	http://www.google	software for online	Sales
199.43.48.131	http://www.velaro	00:00:50						Sales
bouvier.msb.priv	https://login.velaro	00:00:53						Control Panel
209.5.242.26	https://login.velaro	00:02:55						Control Panel
cpc1-ches3-0-0-cu	https://login.velaro	00:03:12				https://login.velaro		Control Panel
74-93-220-38-Was	http://www.velaro	00:05:21						Sales
pool-173-67-5-74	http://www.velaro	00:08:08						Sales
domain.not.config	http://www.velaro	00:10:32	jamal		Google	http://www.google	livefluence	Sales

Since	Url
11/1/2011 7:16 am	https://login.velaro.com/Default.aspx?tabid=54
11/1/2011 7:16 am	https://login.velaro.com/Default.aspx?tabid=147-id=801
11/1/2011 7:16 am	https://login.velaro.com/?otk=a089270f-2b76-4cc1-a83b-3b9f7a92198e
11/1/2011 7:16 am	https://login.velaro.com/Default.aspx?tabid=147-id=801

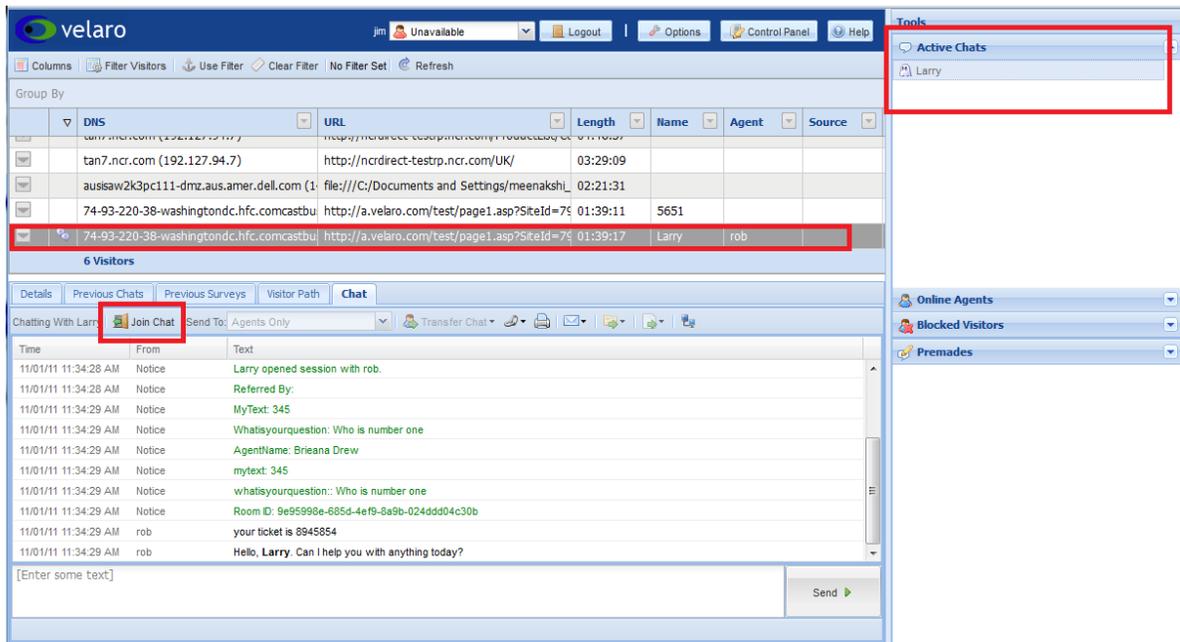
Select any link to open the webpage

Columns:

1. **When:** Displays the time at which the visitor started browsing the page
2. **Time on Page:** Displays the total time that the visitor spent on the page.
3. **Page:** Displays the URL of the page.

3.7 Shadowing Chats

Other agents such as supervisors can shadow a chat using the chat tab that will only appear when a chat is in progress on the right side of the Web Agent under Active Chats. The agent who is shadowing can join the chat at anytime by clicking on the Join Chat button. The agent who is shadowing can only exchange messages with the agent who is chatting, the visitor will not be able to see these messages. The shadow chat also provides a access to pre-made messages as well as other chat features.

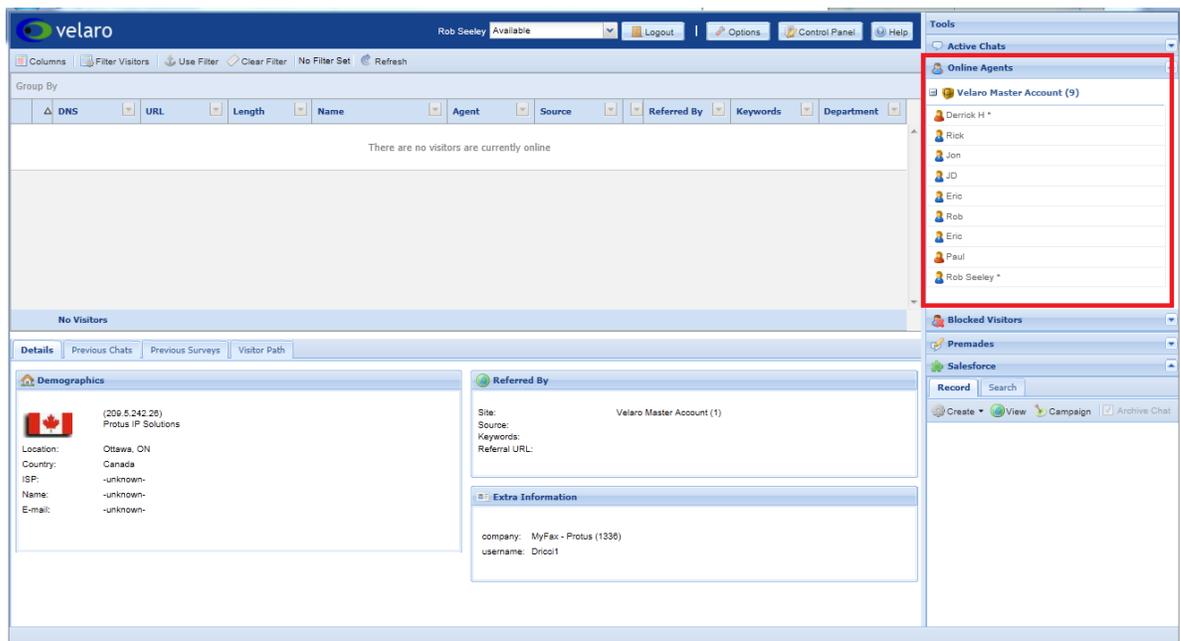


4 Viewing Other Agents

The Web Agent provides agents with the ability to view and chat with other agents. This feature is useful when a chat needs to be transferred to another agent when a question is unable to be answered or perhaps needs to be escalated. This option also allows you to have a private chat with another agent by double clicking on their name.

To view other agents:

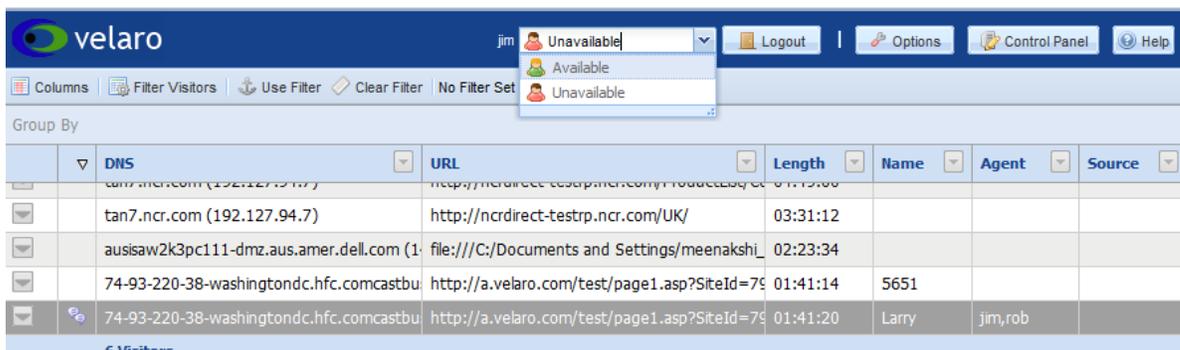
1. Click on the Agents tab of your Velaro Web Agent.
2. A pop up window is displayed with a list of agents who are logged in at that time and their availability to accept chats.



An agent's availability can also be viewed from the Agents window. When an agent is unavailable to chat, a red circle is displayed next to the icon before the agent's name.

5 Setting Agent Availability

An agent's available to receive chats can be changed directly from the Web Agent. This change can be made using the Status drop down box. If a status is set to available, the agent is logged in and will receive chats. If a status is set to unavailable the agent is logged in but will not receive any new chats.



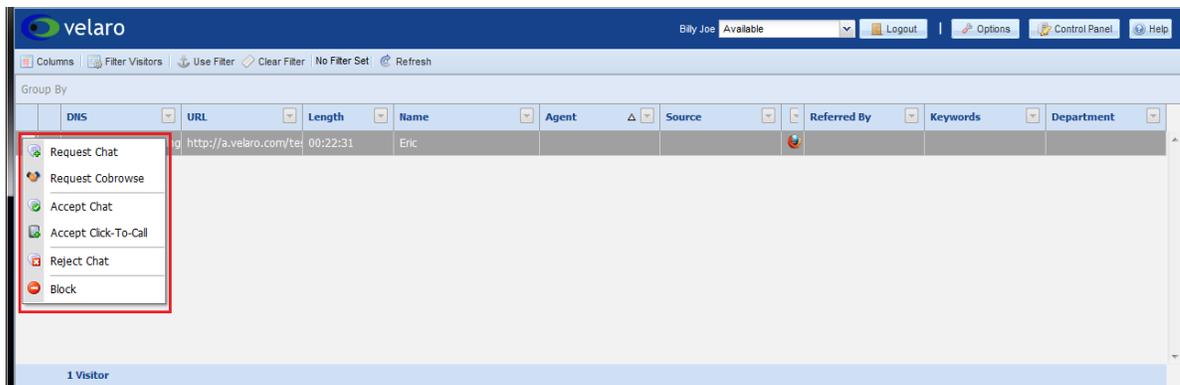
6 Conducting Chats

Using the Visitor Menu you can Request a chat with a visitor browsing the site, accept a chat if the

visitor's status is displayed as waiting, accept Click to Call if the visitor has requested a click to call, reject a chat or Block a Visitor.

Note: Only the options that are available to you are displayed and accessible in the visitors menu, all the other options will be grayed out. For example, if a visitor is already chatting with an agent, the only option available to you is to Block Visitor. Similarly, the Accept Chat option is enabled only when a visitor has requested a chat and is waiting for an agent to respond.

To access the visitors menu first locate the  icon on the very left of the visitor and click the drop down arrow, all options will then be visible.



Options Menu:

Request Chat: Use this option to request a proactive chat with a visitor who has been browsing the website for some time. When you request a chat, the premade messages window will pop up asking which premade message you would like to use to invite the visitor to chat. Select Premade message and double click on it to initiate a chat with a user. This pops up a chat request on the website for the visitor.

Request Cobrowse: Use this option to request a cobrowsing session with a visitor.

Accept Chat: Use this to accept a chat request only if the visitor has initiated a Chat request

Accept Click-to-Call: If a visitor has initiated a Click to Call request, Click on this Icon to accept the Click to call.

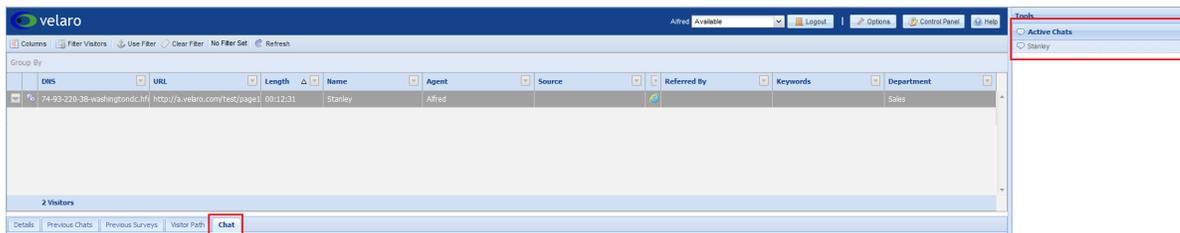
Reject Chat: Use this option to Reject a chat request. This feature is useful when there are duplicate or fake chat requests

Block: The Block Visitor option allows you to block chat requests from unwanted or problematic

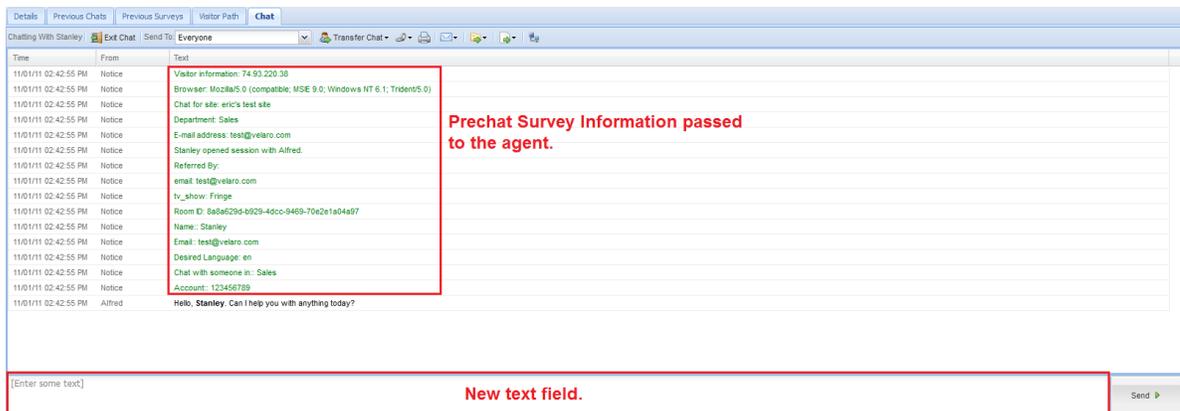
visitors.

6.1 Viewing and Sending Text

Once you accept a chat request from a visitor, a new active chat populates on the right hand side of the web client in the tools bar. Also a chat tab will be available below the visitor list.



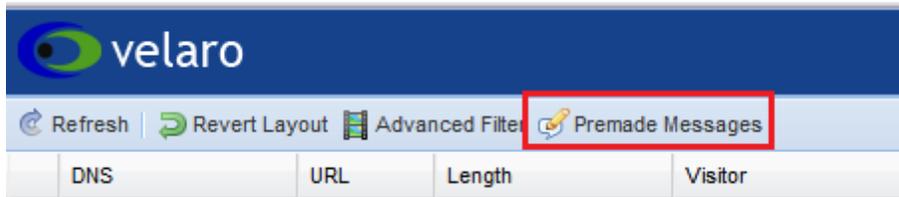
This chat tab allows you to send as well as view messages from the visitor. The top half of the window will display visitor messages, system messages, and your own messages. The lower part of the window is where you can type in your responses to the visitor's questions.



6.2 Using Premade Messages

Premade messages eliminate repetitive typing of commonly used phrases and FAQs used in chats with visitors. There are two types of premade messages within Velaro (depending upon account license purchased) shared and personal. Personal premade messages are messages that agents create for themselves, no other agents will have access to other agents personal premade messages. Shared premade messages are created by an administrator and are available to all agents. Premade messages can be accessed and used within chats by first navigating to the

Premade Messages tab above the visitor information.



A window will open containing all of the premade messages that the user can access and to insert a premade message into a chat, select the category and then double click the individual message.

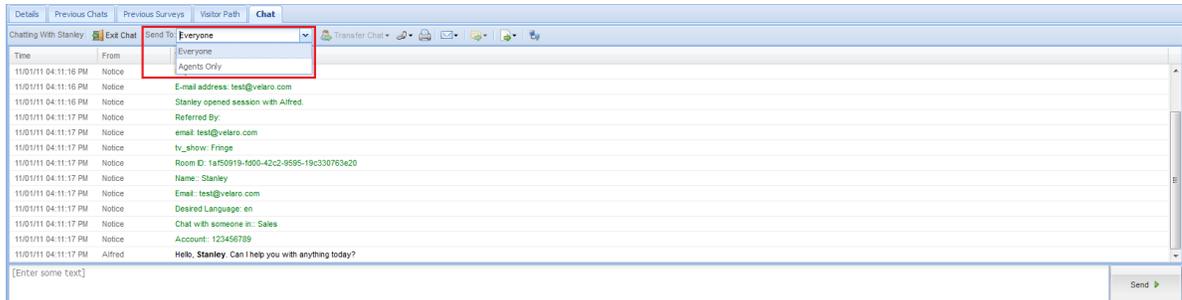
The screenshot shows the Velaro interface with a chat window open. A 'Premades' window is overlaid on the chat, displaying a list of premade messages. The 'Premades' window has tabs for 'Global', 'Department', and 'Personal'. The 'Global' tab is selected, showing a list of premade messages under the 'Contact Info for Velaro' category. The message 'GENERAL phone' is highlighted in a red box. The chat window shows a conversation with 'eric test' and a message about reaching Velaro by phone.

6.3 Sending Notes and Private Text

The chat window also allows agents to exchange messages with managers and other agents.

1. From the Send To box, select who will be able to view the text (Everyone or Agents Only)
2. Type in the private message in the response window
3. Select the Send button to send

- The message will only be displayed for the category selected in the Send To field



6.4 Sending Files

Files can be sent to customer from the chat window using the Send a File button. This feature is great to send any type of document to a potential customer including manuals, troubleshooting guides, and pamphlets.

To send a file first click the  icon which allow you to browse for the file you wish to upload.



Once the file has been selected, click the upload button to send the file to the visitor within the chat.

6.5 E-mailing Transcripts

Chat transcripts can be emailed to anyone directly from the chat window.

- Click on the  icon.
- In **Email to**: Type in the email id to which you want to send the transcript.
- Select the Send button to send the transcript



6.6 Pushing a Web Page

A webpage can be pushed to any visitor from within the chat window. To push a web page:

1. Click on the  icon.
2. Enter the URL to push to the visitor (ex: www.velaro.com)
3. Select **Push**



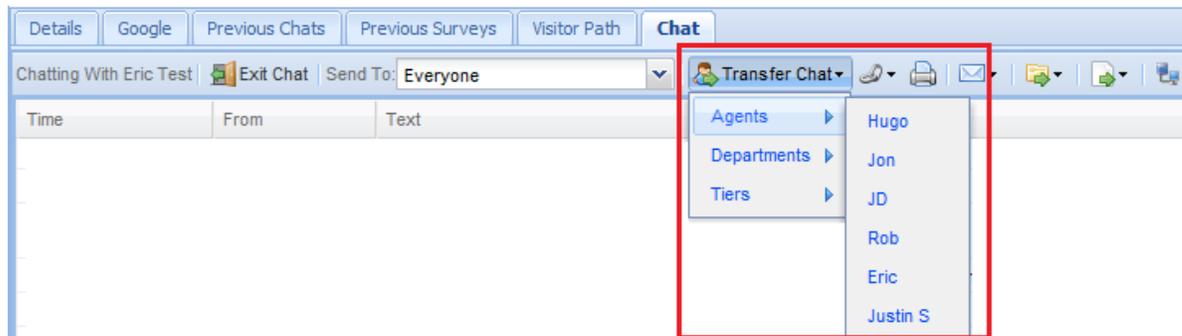
On the visitor's end, if pop-up blockers are disabled the webpage will immediately open in a new window outside of the chat window. Below is an example of how the webpage displays within the chat window from the visitor's perspective:

6.7 Transferring Chats

Chats can be transferred from one agent to another through the chat window. For example, if a support agent is chatting with a visitor and determines they need to speak to someone in the billing department they may choose the option to transfer and then to their billing department. Chats can also be transferred to specific agents.

To Transfer a Chat:

1. Click on the  icon.
2. This opens a list of Agents, Departments or Tiers that chats can be transferred to
3. Select agent, department, or tier to transfer chat to
4. The system displays a message that the chat was successfully transferred. Your chat window disappears as it is transferred to another agent.



6.8 CRM Integration

Velaro Integrates with several CRM systems including Sugar CRM, Netsuite, ZenDesk, and Salesforce

Each CRM integration requires its own setup by the Administrator within the Velaro Control Panel. Below are links to our popular CRM integration guides:

[Salesforce Integration Guide](#)

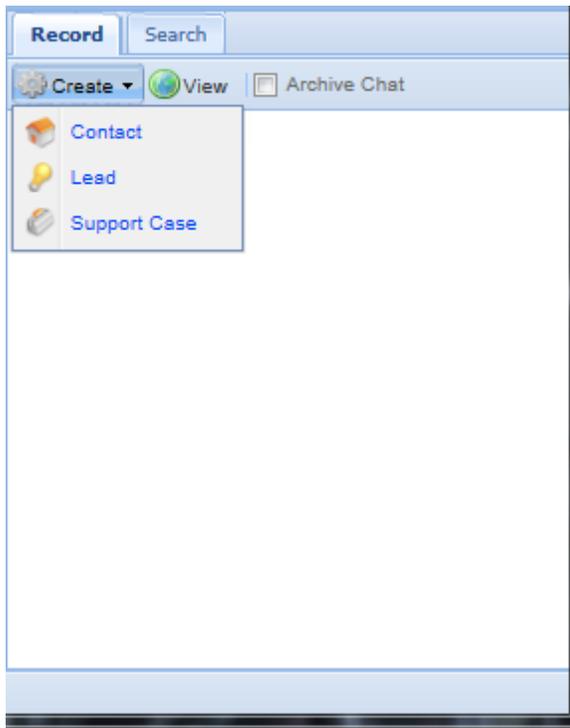
[Zendesk Integration Guide](#)

[Netsuite Integration Guide](#)

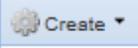
[SugarCRM Integration Guide](#)

Once the integration has been completed, agent's will be able to search, select, and create records within these CRM systems directly from the Web Agent.

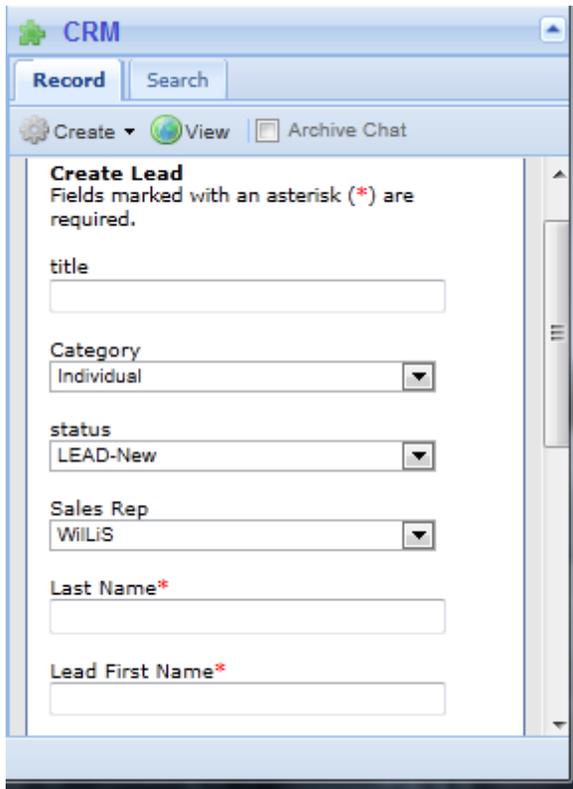
The following image below displays the chat window including a CRM integration:



To create a record within the CRM tool:

Click on the  icon. This will allow you to create a new case, account, contact, or lead depending on your CRM Settings

Agents will then be directed to fill in the appropriate information and click **Create Record**.



The screenshot shows a CRM application window titled "CRM". Below the title bar is a "Record" tab and a "Search" button. A menu bar contains "Create", "View", and "Archive Chat". The main content area is titled "Create Lead" and includes a note: "Fields marked with an asterisk (*) are required." The form contains the following fields:

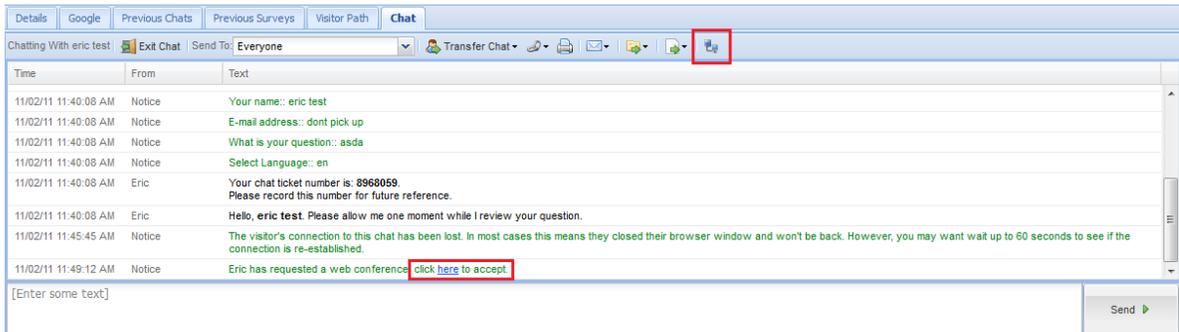
- title: text input field
- Category: dropdown menu with "Individual" selected
- status: dropdown menu with "LEAD-New" selected
- Sales Rep: dropdown menu with "WILIS" selected
- Last Name*: text input field
- Lead First Name*: text input field

6.9 Desktop and File Collaboration

The web client allows agents to start a remote desktop session from the chat window. By starting a remote desktop session this allows the agent to connect to the visitor's computer to view information and webpages. This feature can be extremely helpful when explaining features and functions of a webpage. Remote desktop sharing does need to be approved by the visitor and can also be ended by them at any time during the session.

Note that the remote desktop feature is enabled at the subscription level of your account

To start a Remote Desktop session click on the  icon above the chat text. This will launch a new window for the agent and on the visitor's end they will get a message to "click here to accept"



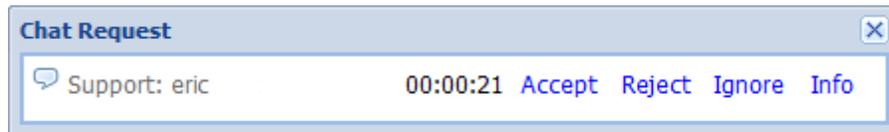
Once the session is started you will be able to see the visitor has joined, change screen sharing options, and sign out of the session itself.



7 Managing Alerts

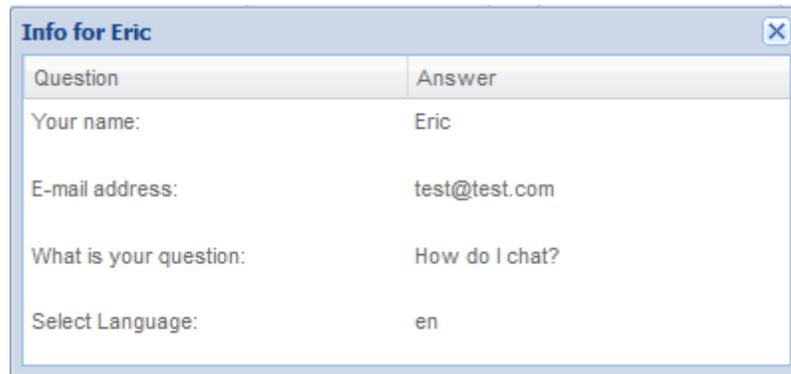
Whenever a visitor initiates a chat a visual alert is displayed and a sound is played based on the Alerts that an agent has configured (see Configuring the Web Agent > Sound Settings).

If the queuing feature is enabled, the following alert will display for chats:



Managing Alerts:

1. Click on **Accept Chat** to accept the chat.
2. Click on **Reject Chat** to reject the chat.
- 3.. Click on **Ignore Chat** to ignore chat.
4. Click on **Info** to view the visitor's Prechat Survey. (see below)

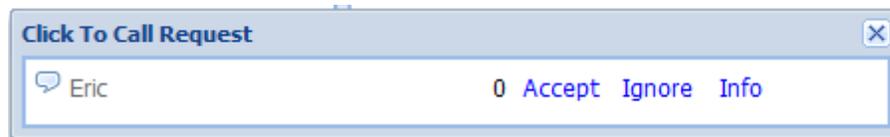


A screenshot of a dialog box titled "Info for Eric" with a close button (X) in the top right corner. The dialog box contains a table with two columns: "Question" and "Answer".

Question	Answer
Your name:	Eric
E-mail address:	test@test.com
What is your question:	How do I chat?
Select Language:	en

8 Conducting Click-to-Call

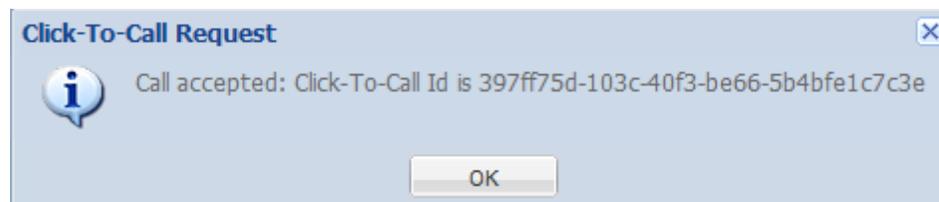
The Click-to-Call feature allows the visitor to leave a number for an agent to call back immediately. It is similar to a chat request but using this feature the visitor selects the click to call button to initiate the request and then enters a number where he/she can be reached.



The agent who is handling the least number of chat requests or has no requests gets the alert for the click to call request from the visitor. The alert has the 3 following options:

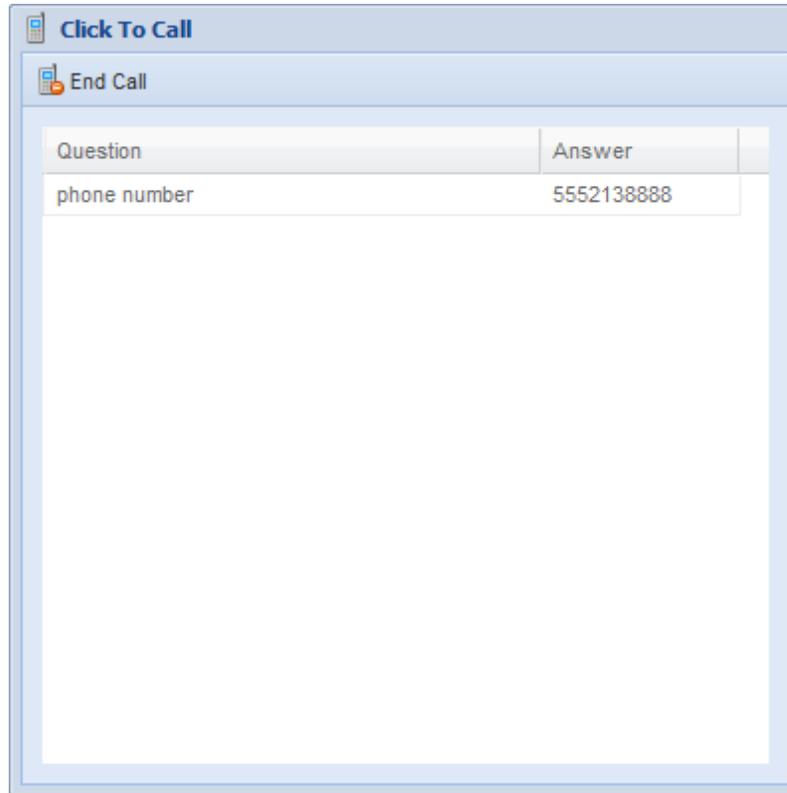
1. Click **Accept** to accept the click to call request.
2. Click **Ignore** to ignore the request
3. Click **Info** to view any survey information the visitor filled out.

. Once the call has been accepted the agent will receive a reference ID.



You can also utilize the Click-to-Call feature along with one of the following VOIP phone services:

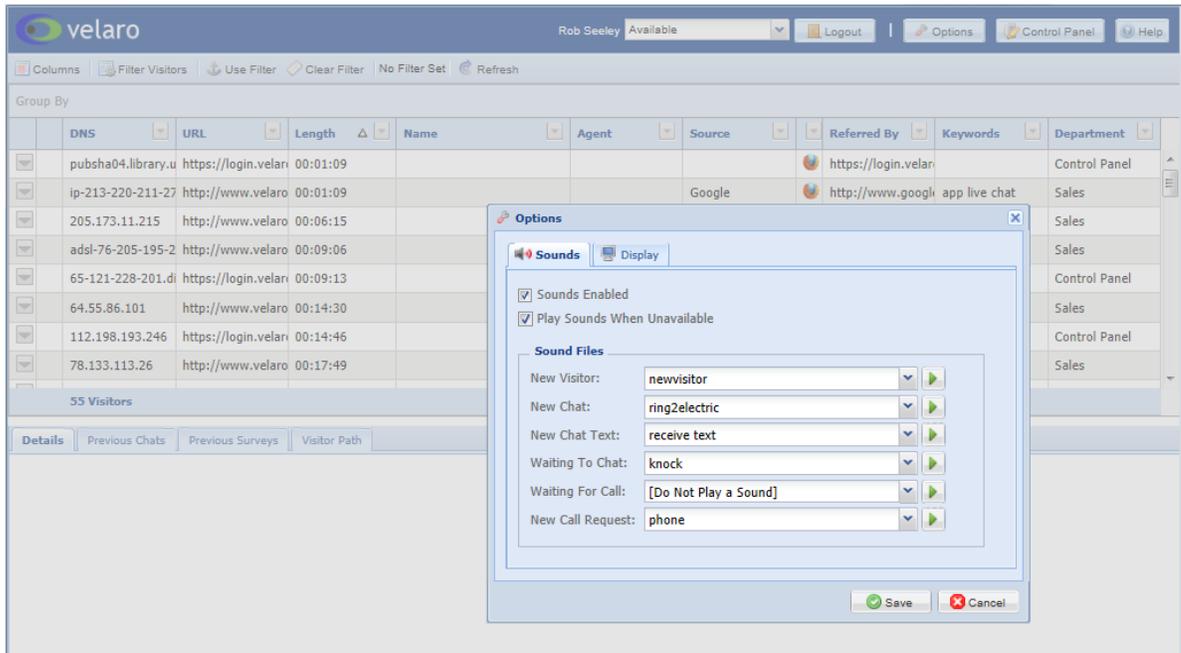
Aptela, CallWithUs, Twilio, and Vonage. When using these services, once the visitor initiates the call it will automatically dial them as well as the available agent. In this case the agent receives a Click-to-Call pop up window.



9 Web Agent Options

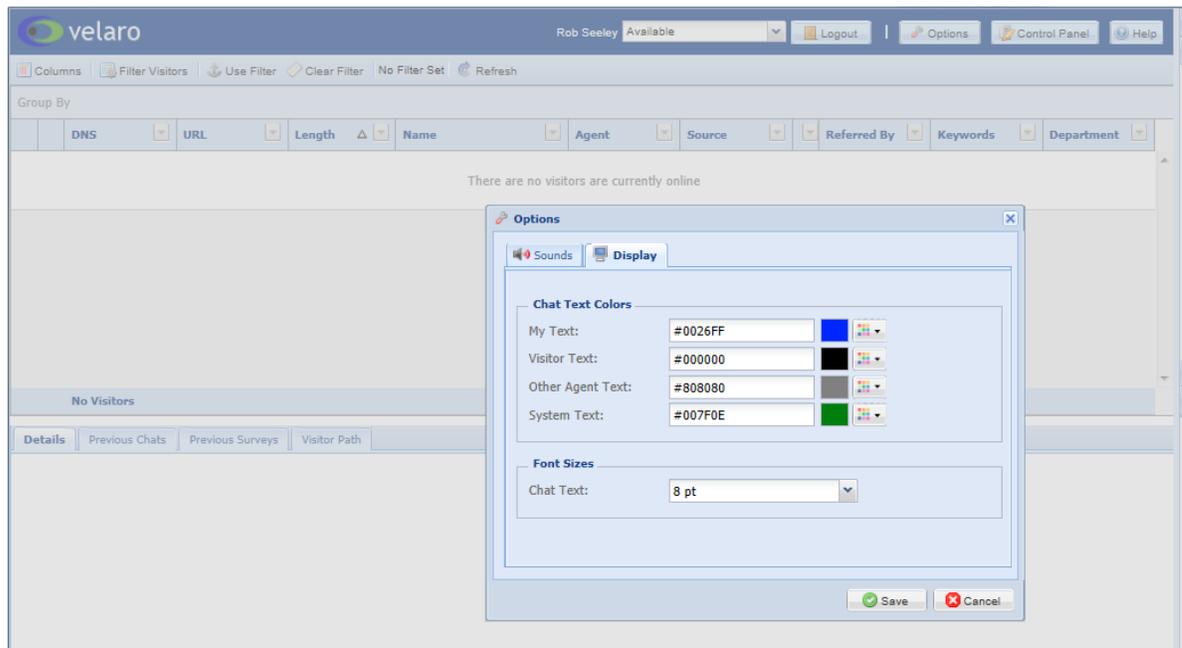
To access the options where you can configure the Velaro Web Agent, Select **Options** from the Tools menu.

This opens the Options windows where you can configure your settings.



Sounds

Sounds Enabled	Disable or enable all sounds
Play Sounds When Unavailable	Turn all sounds off when status is set to unavailable
New Visitors	Play sound when new visitor enters site
New Chat	Play sound for new chat alert
New Chat Text	Play sound for
Waiting to Chat	Select sound to play when a visitor is waiting to chat or mute sound not to play any sound when a visitor is waiting to chat.
Waiting for Call	Select Sound to play when a visitor is waiting for call or mute sound not to play any sound when a visitor is waiting for a call.
New Call Request	Select the sound to play when there is a new Call Request



Display

My Text	Select the color for your text within the chat window
Visitor Text	Select the color in which the visitor's comments should be displayed in the chat window.
Other Agents Text	Select the color in which other agents' comments to appear.
System Text	Select the color in which system messages to appear.
Chat Text	Select the font size for the text .