Invitations

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Data Sheet

LIVEPERSON

Introduction

Invitations enable you to invite visitors to chat or talk with operators. An invitation is a graphic that is displayed to the visitor browsing your website. invitations are an effective way of engaging visitors to chat or talk with your operators. The invitations are defined by specifying the position and the path to the graphics. You can define one default invitation for each channel (Chat and Voice). The invitation will be sent to the visitor when the agent invites a visitor. Other invitations can be used as the outcome of rules or by specifying the default invitation to use in particular web pages.

This document explains how to create chat and voice invitations and how to use dynamic text to make invitations more personable. For information on how to customize invitations, refer to the *Call Window Editor* Data Sheet in the Knowledgebase.

Note: *Voice invitations apply to LivePerson products with the voice function enabled.*

Creating an Invitation

You can create separate invitations for both chat and voice.

Note: *Multichannel invitations are explained in a separate Data Sheet.*

Chat Invitation

☞ **To create a chat invitation:**

1 From the Admin Console menu, select **Visitor Experience** > **Chat** > **Invitations** (tab). The Invitations page is displayed.

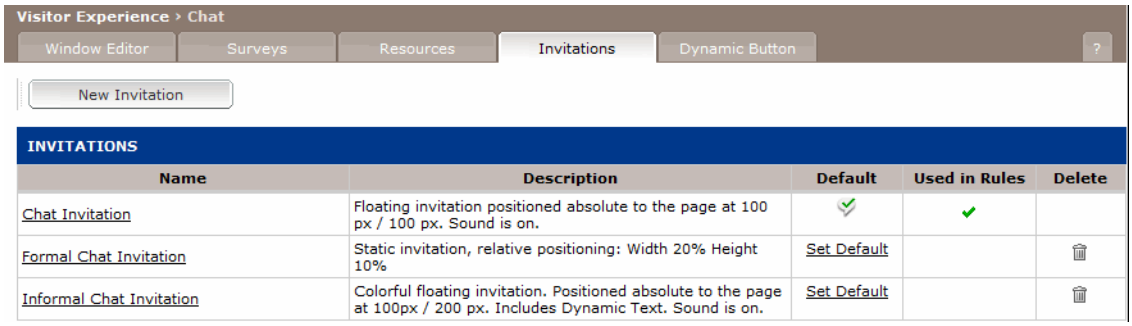

Figure 1-1: *Chat Invitations Main Page*

2 Click **New Invitation** button, the Add / Edit Invitation page is displayed.

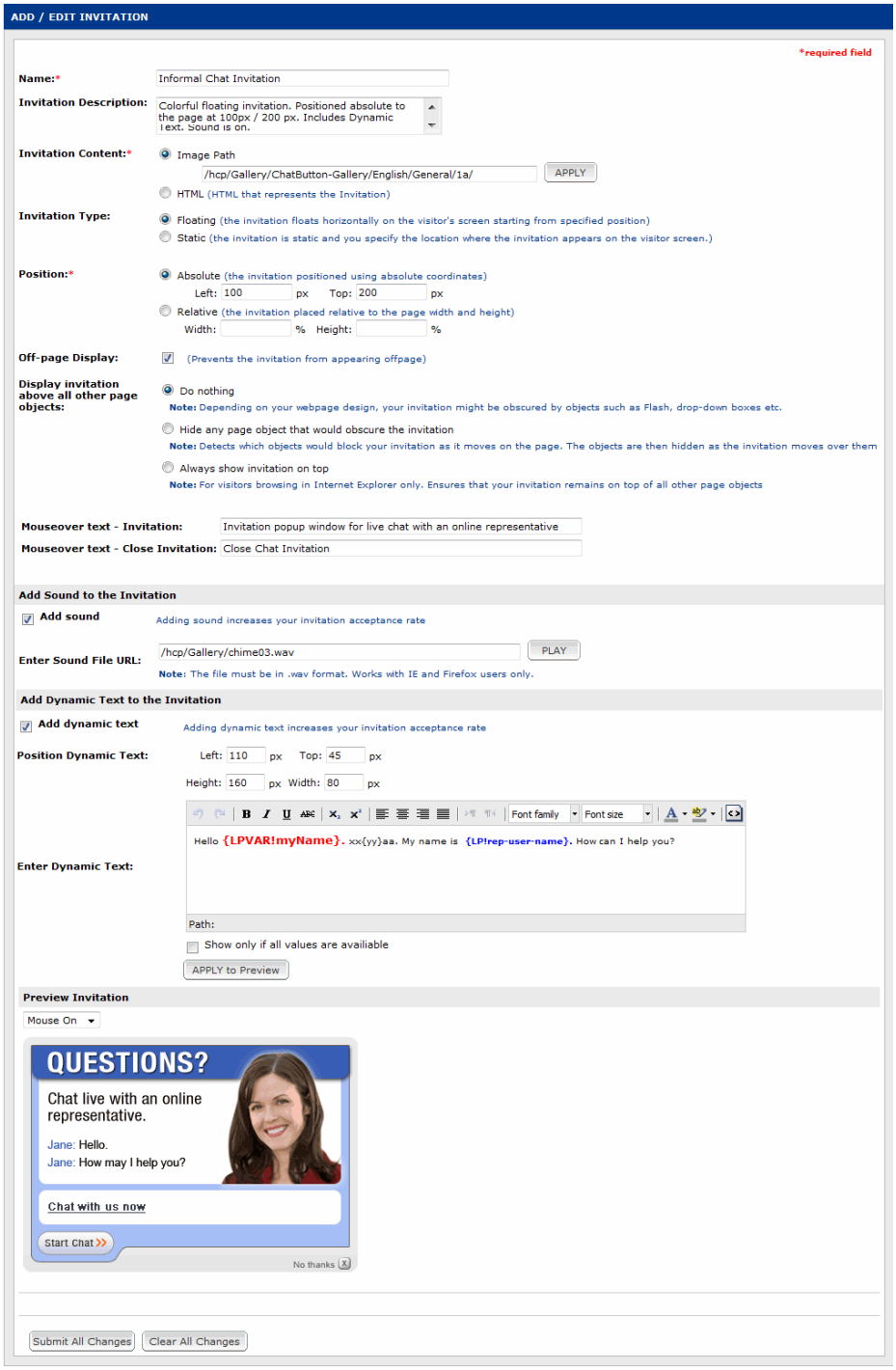

Figure 1-2: *Add / Edit Invitation – Chat*

3 Enter the name of the invitation.

4 Enter a description of the invitation, if required.

5 Select the Invitation Content, either Image Path or HTML:

- **Image Path:** Add the path to the image folder.
- **HTML:** Add visitor attributes to an HTML invitation, thereby making it a dynamic invitation. Select the **Support dynamic text tags** check box to add Visitor Attributes to the HTML invitation. For more information about dynamic invitations, see "Dynamic Invitations Text" on page 11.

Note: *When this option is selected, the* **Add Dynamic Text to the Invitation** *area is not displayed.*

6 Select the way you want the invitation to appear:

- **Floating:** The invitation appears and moves across the visitor's page from a specified position.
- **Static:** A static invitation appears at the defined location on the visitor's screen.

7 Define the position of the invitation, either:

- **Absolute:** The invitation is positioned using absolute coordinates. Define the left and top coordinates in pixels. The distance is measured from the top left corner of the browser's display area.
- **Relative:** The invitation is positioned using relative coordinates. Define the width and height as a percentage.

8 Select the **Off-page Display** check box to prevent the invitation from appearing off the page. This is necessary if the defined **Position** of the invitation is out of the visible limit of the visitor's screen.

9 Select one of the following options to prioritize the display of the invitation in relation to other windows:

- **Do nothing:** Leave the settings as is, however your invitation may be obscured by other objects. Depending on your Web page design, your invitation might be obscured by objects such as Flash and drop-down boxes.
- **Hide any page object that would obscure the invitation:** Detects which objects would block your invitation as it moves on the page. The objects are then hidden as the invitation moves over them.
- **Always show invitation on top:** This option ensures that your invitation remains on top of all other page objects. Click on the color pad to select a color of the mask that is used to display the chat window invitation. This option is only available for visitors browsing in Internet Explorer.

10 Enter the ToolTip that is displayed when visitors place their mouse over the invitation area.

11 Enter the ToolTip that is displayed when visitors place their mouse over the Close button.

12 To add sound to the invitation, select the **Add sound** check box and enter the location of the sound file.

Note: *Including a sound with an invitation, has shown to increase the number of visitors who accept an invitation. Click the* **Play** *button to play the file. The file must be in WAV format and works with the Internet Explorer and Firefox browsers.*

13 To set dynamic text within an invitation, select the **Add Dynamic Text** check box. For more information on dynamic text see "Dynamic Invitations Text" on page 11.

14 You can preview the invitation options, in the Preview Invitation area. Select Mouse On from the drop-down menu, to change the image when the mouse pointer "rollsover" the graphic.

15 Click **Submit All Changes**.

Voice Invitation

Voice and chat invitations are almost identical, the main difference between voice and chat invitation is the option to select between the voice types Single-Step or Dual-Step, where the visitor can request a callback in either one or two steps.

☞ **To create a voice invitation:**

1 From the Admin Console menu, select **Visitor Experience** > **Voice** > **Invitations** (tab). The Invitations page is displayed.

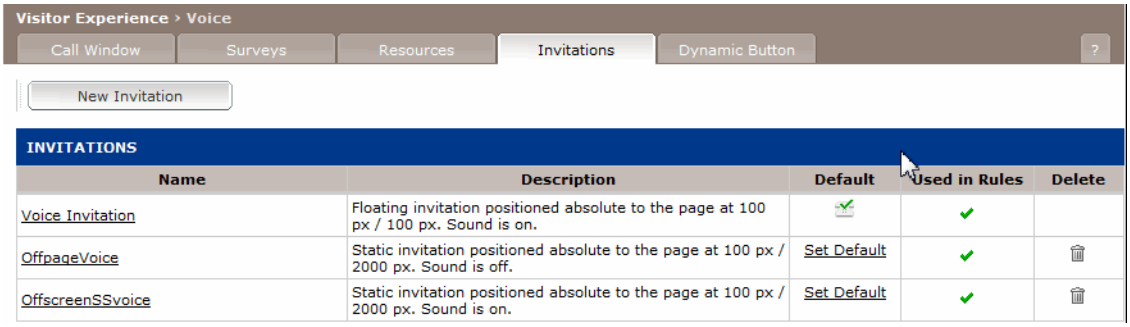

Figure 1-3: *Voice Invitations Main Page*

2 Click **New Invitation** button, the Add / Edit Invitation page is displayed.

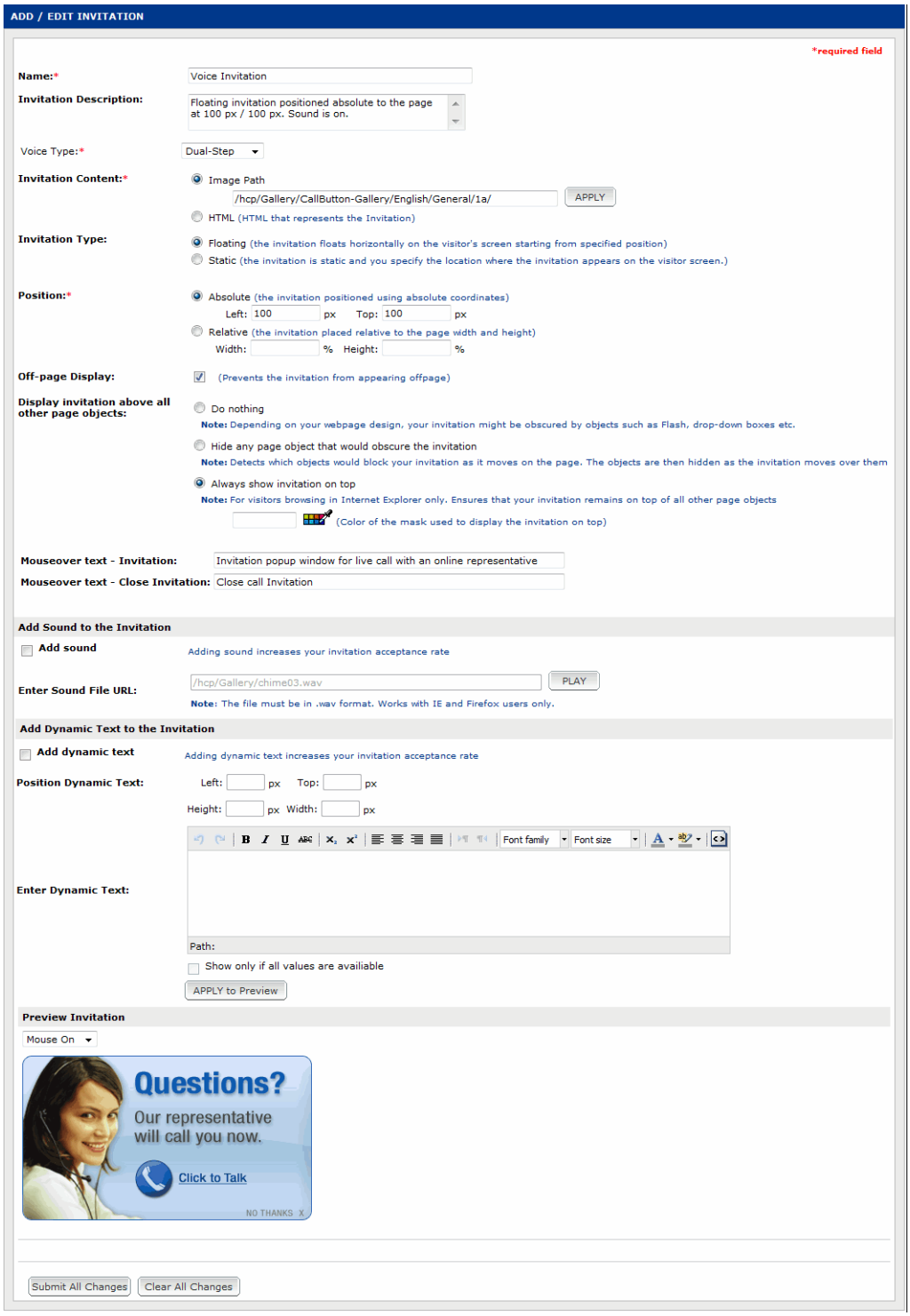
ADD / EDIT INVITATION
*required field
Name:*
Voice Invitation
Invitation Description:
Floating invitation positioned absolute to the page at 100 px / 100 px. Sound is on.
Voice Type:*
Dual-Step
Invitation Content:*
Image Path
/hcp/Gallery/CallButton-Gallery/English/General/1a/
APPLY
HTML (HTML that represents the Invitation)
Invitation Type:
Floating (the invitation floats horizontally on the visitor's screen starting from specified position)
Static (the invitation is static and you specify the location where the invitation appears on the visitor screen.)
Position:*
Absolute (the invitation positioned using absolute coordinates)
Left: 100 px Top: 100 px
Relative (the invitation placed relative to the page width and height)
Width: % Height: %
Off-page Display:
(Prevents the invitation from appearing offpage)
Display invitation above all other page objects:
Do nothing
Note: Depending on your webpage design, your invitation might be obscured by objects such as Flash, drop-down boxes etc.
Hide any page object that would obscure the invitation
Note: Detects which objects would block your invitation as it moves on the page. The objects are then hidden as the invitation moves over them
Always show invitation on top
Note: For visitors browsing in Internet Explorer only. Ensures that your invitation remains on top of all other page objects
(Color of the mask used to display the invitation on top)
Mouseover text - Invitation:
Invitation popup window for live call with an online representative
Mouseover text - Close Invitation:
Close call Invitation
Add Sound to the Invitation
Add sound
Adding sound increases your invitation acceptance rate
Enter Sound File URL:
/hcp/Gallery/chime03.wav
PLAY
Note: The file must be in .wav format. Works with IE and Firefox users only.
Add Dynamic Text to the Invitation
Add dynamic text
Adding dynamic text increases your invitation acceptance rate
Position Dynamic Text:
Left: px Top: px
Height: px Width: px
Font family
Font size
Enter Dynamic Text:
Path:
Show only if all values are availiable
APPLY to Preview
Preview Invitation
Mouse On
Questions?
Our representative will call you now.
Click to Talk
NO THANKS
Submit All Changes
Clear All Changes

Figure 1-4: *Add / Edit Invitation – Voice*

3 Enter the name of the invitation.

4 Enter a description of the invitation, if required.

5 Select the Voice Type:

- **Single-Step:** The visitor requests a callback in one step. The visitor enters their country, if required, and phone number details, which are displayed on the invitation and the visitor proceeds directly to a call.
- **Dual-Step:** The visitor requests a callback in two steps. In the first step the visitor clicks the Click-to-Talk button in the invitation, and in the second step the visitor enters their country, if required, and phone number details in the Pre Call window.

6 Select the Invitation Content, either Image Path or HTML:

- **Image Path:** Add the path to the image folder. This is the recommended option.
- **HTML:** Enter the HTML that represents the invitation. Select the **Support dynamic text tags** check box to add Visitor Attributes to the HTML invitation. For more information about dynamic invitations, see "Dynamic Invitations Text" on page 11.

Note: *When the HTML option is selected, the* **Add Dynamic Text to the Invitation** *area is not displayed.*

7 Select the way you want the invitation to appear:

- **Floating:** The invitation appears and moves across the visitor's page from a specified position.
- **Static:** A static invitation appears at the defined location on the visitor's screen.

8 Define the position of the invitation, either:

- **Absolute:** The invitation is positioned using absolute coordinates. Define the left and top coordinates in pixels. The distance is measured from the top left corner of the browser's display area.
- **Relative:** The invitation is positioned using relative coordinates. Define the width and height as a percentage.

9 Select the **Off-page Display** check box to prevent the invitation from appearing off the page. This is necessary if the defined **Position** of the invitation is out of the visible limit of the visitor's screen.

10 Select one of the following options to prioritize the display of the invitation in relation to other windows:
   - **Do nothing:** Leave the settings as is, however your invitation may be obscured by other objects. Depending on your Web page design, your invitation might be obscured by objects such as Flash and drop-down boxes.
   - **Hide any page object that would obscure the invitation:** Detects which objects would block your invitation as it moves on the page. The objects are then hidden as the invitation moves over them.
   - **Always show invitation on top:** This option ensures that your invitation remains on top of all other page objects. Click on the color pad to select a color of the mask that is used to display the chat window invitation. This option is only available for visitors browsing in Internet Explorer.

11 Enter the ToolTip that is displayed when visitors place their mouse over the invitation area.

12 Enter the ToolTip that is displayed when visitors place their mouse over the Close button.

13 To add sound to the invitation, select the **Add sound** check box and enter the location of the sound file.

Note: *Including a sound with an invitation, has shown to increase the number of visitors who accept an invitation. Click the* **Play** *button to play the file. The file must be in WAV format and works with the Internet Explorer and Firefox browsers.*

14 To set dynamic text within an invitation, select the **Add Dynamic Text** check box. For more information on dynamic text see "Dynamic Invitations Text" on page 11.

15 You can preview the invitation options, in the Preview Invitation area. Select Mouse On from the drop-down menu, to change the image when the mouse pointer "rollsover" the graphic.

16 Click **Submit All Changes**.

Voice Types

When setting up a voice invitation, you need to select either a Single-Step or Dual-Step voice type:

Single-Step Voice Type

With a Single-Step voice type the visitor requests a callback in one step. The visitor enters their country and phone number details, which are displayed on the invitation and the visitor proceeds directly to a call. The Single-Step voice type is displayed below.

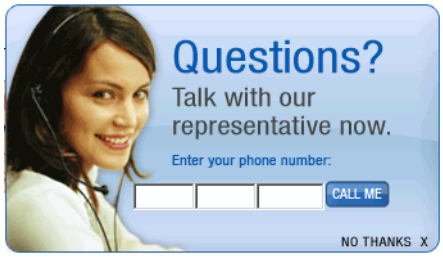

Figure 1-5: *Pre Call Window - Single-Step*

Below are the settings to define a Single-Step voice type.

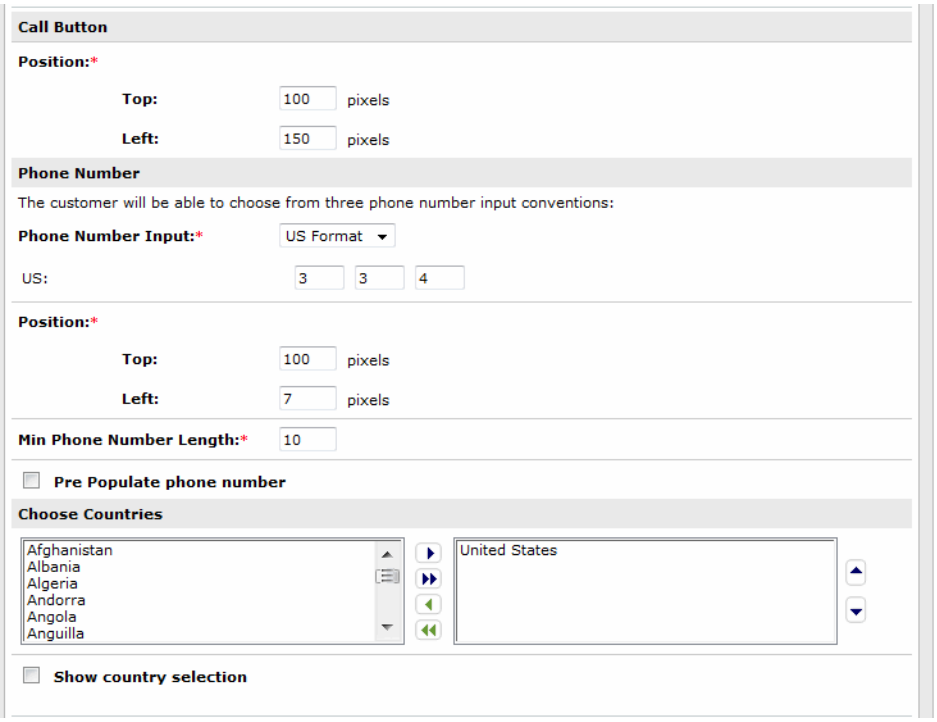

Figure 1-6: *Single-Step Settings*

☞ **To specify the single-step voice settings:**

1. From the Admin Console menu, select **Visitor Experience** > **Voice** > **Invitations** (tab).
2. Click **New Invitation** button, or select an existing invitation, to display the Add / Edit Invitation page.

3 In the **Voice Type** field, select the Single-Step option.

4 In the **Call Button** area, define the top and left coordinates of the Click-to-Talk button in pixels.

5 Select one of the following Phone Number Input options:

- **US Format:** The phone number is divided into three groups, with three digits in the first two groups and four digits in the last group.
- **Plain:** The phone number is presented in one group with a maximum number of allowed digits.
- **Formatted:** The phone number is divided into groups according to the specified number of fields, with a maximum number of digits allowed per field.

6 Enter the Minimum Phone Number Length. The system will verify that all phone numbers are greater than the specified number.

7 Define the top and left coordinates of the Phone Number area in pixels.

8 Enter the Minimum Phone Number Length. The system will verify that all phone numbers are greater than the specified number.

9 To fill in the phone number that the visitor entered on a previous visit, select the **Pre Populate phone Check** box.

10 In the Choose Countries area of the page, select the required countries that you want to appear in the list. The first country in the list is the default (selected) country. You can change the order of the countries by using the up and down arrow buttons.

11 Select the **Show country selection** check box to enable the visitor to select the required countries from the Choose Countries area. If this check box is not selected the Choose Countries area will not be displayed and the system will automatically use the country prefix for the default country (first country in the list).

12 Click **Submit All Changes** to save all changes and go back to the Invitations page, or click **Clear All Changes** to clear all fields and go back to the Invitations page.

Note: *The Single-Step option does not support HTML invitations.*

Dual-Step Voice Type

With a Dual-Step voice type the visitor requests a callback in two steps. In the first step the visitor clicks the Click-to-Talk button in the invitation, and in the second step the visitor enters their country and phone number details in the Pre Call window.

Figure 1-7: *Click-to-Talk Button - Dual-Step*

Figure 1-8: *Pre Call Window - Dual-Step*

☞ **To specify the dual-step voice settings:**

1. From the Admin Console menu, select **Visitor Experience** > **Voice** > **Invitations** (tab).
2. Click **New Invitation** button, or select an existing invitation, to display the Add / Edit Invitation page.
3. In the **Voice Type** field, select the Dual -Step option.

Note: *For details in customizing a call window, refer to the Data Sheet "Call Window Editor" in the Knowledgebase.*

Dynamic Invitations Text

Dynamic invitation texts enables site administrators to dynamically change invitation text based on visitor attributes and rules. For example, the invitation text can include the names of the visitor and the operator. This functionality is available for both non-HTML and HTML invitations, although LivePerson strongly recommends to use the non-HTML as it enables more flexibility with regards to the invitation. In non-HTML invitations, the dynamic text area supports HTML, with the use of the HTML editor.

Note: *If you decide not to allow dynamic text within invitations, for example for security reasons, this functionality can be disabled with approval from your Account Manager.*

Dynamic Invitations Text (Non-HTML)

The **Add Dynamic Text to the Invitation** area enables you to define the dynamic text that will appear in the invitation. This can include plain text and visitor attributes.

The plain text is defined in the HTML editor and includes formatting options such as bolding, aligning and colors. The HTML editor can contain up to 2000 text characters.

The HTML option enables you to define visitor attributes, which is information the system maintains for a visitor, including automatically generated information and custom variables. Custom variables allow you to pass data from your web page through to LivePerson.

To view a list of common visitor attributes as pre-defined macros, click on the visitor attribute button, .

The figure below shows an example of the dynamic text editor.

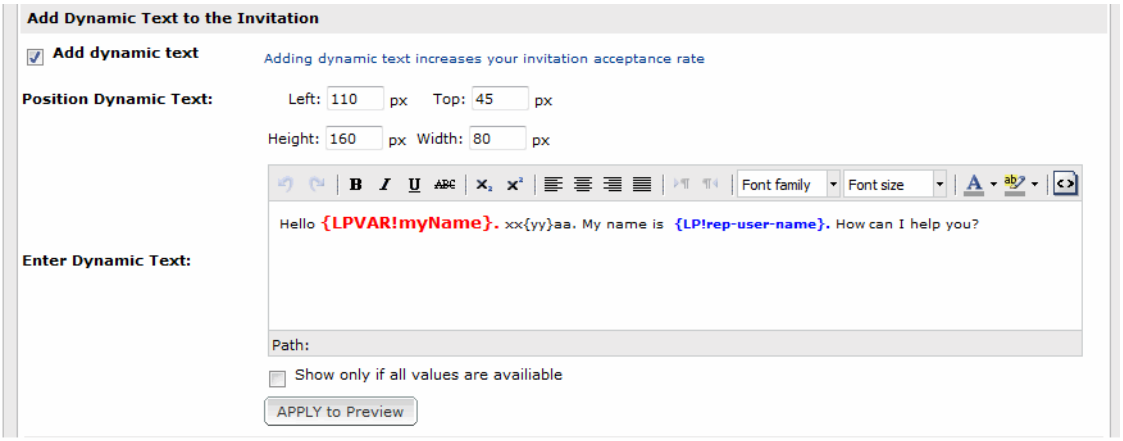

Figure 1-9: *Dynamic Text Editor*

The position fields enable you define where the text is located on the invitation and the height and width of the dynamic text frame. The text in the above example uses the visitor attribute {LP!rep-user-name}, which is the operator's name, and the custom variable {LPVAR!myName}, which is the visitor's name. These are updated by their dynamic values. The other non-dynamic text remains as is. For a list of common visitor attributes see, Table 1.

Note: *Custom variables containing HTML will be converted to plain text.*

To see how the dynamic text is displayed within the chat window, click the **Apply to Preview** button. An orange border indicates the area of the where the dynamic text will be displayed. The border is not shown on the customer's web pages.

Note: *If the* **Show only if all values are available** *check box is selected, all visitor attributes which are defined in the dynamic text must have values when the invitation is generated. If this is not the case, the dynamic text is not shown in the invitation.*

Table 1: *Common Visitor Attributes*

Visitor Attributes	Description
{LPINFO!current-title}	Title of the current page
{LPINFO!host}	Visitor's host address
{LP!current-rep-user-name}	Operator's name
{LPINFO!CurrentReferrer}	Search engine and keywords from referring website
{LP!SearchEngine}	LiveKeyword search engine. For example, Google and MSN
{LP!SearchKeywords}	LiveKeyword search terms entered
{LPINFO!geoCountry}	Country
{LPINFO!geoCity}	City
{LPINFO!geoOrg}	Organization
{LPINFO!geoReg}	World Region
{LPINFO!geoPost}	Postal Code
{LPINFO!geoTimeZone}	Time Zone
{LPINFO!geoISP}	ISP
{LPINFO!geoConType}	Connection Type

Dynamic Invitations Text (HTML)

For HTML dynamic invitation text , select the HTML option in the **Invitation Content** field, and enter the HTML that represents the invitation. The HTML should be placed within a tag, which defines a division in a document.

Figure 1-10: *HTML Dynamic Invitation Text*

The HTML should *not* contain <html>, <head> or <body> tags, but can contain the following macros:

- ON_INVITE_ACCEPT: Accept the invitation
- ON_INVITE_REJECT: Close (and reject) the invitation
- INVITE_STOP_FLOATING: Stop the floating invitation
- INVITE_RESUME_FLOATING: Resume floating the invitation

These macros are highlighted in the example code below:

```
<table border='0' cellspacing='0' cellpadding='0' style='border-left:none;
                                                              border-right:
  <tr>
    <td style='border-bottom:none; background:none'>
      <a name='needRef' id='needRef' href='#' title='invitation popup window
                                          for live chat with an online represe
        onClick='ON_INVITE_ACCEPT' target='_self'
        onmouseover='INVITE_STOP_FLOATING'
        onmouseout='INVITE_RESUME_FLOATING'>
        <img name='need_help' id='need_help' src='https://hc1/hcp/woman/10/er
                                                                  need_help_
        alt='invitation popup window for live chat with an online
                                representative' border='0' style='display: bl
      </a>
    </td>
  </tr>
  <tr>
    <td style='border-bottom:none; background:none'>
      <a href='#' title='Close Chat Invitation'
        onClick='ON_INVITE_REJECT' target='_self'
        onmouseover='INVITE_STOP_FLOATING'
        onmouseout='INVITE_RESUME_FLOATING'>
        <img name='need_close' id='need_close' src='https://hc1/hcp/woman/10/
                                                        en/close_on.gif' bor
        alt='Close Chat Invitation' style='display: block;'/>
      </a>
    </td>
  </tr>
```

To enable the addition of visitor attributes to the HTML invitation, select the **Support dynamic text tags** check box, thereby making the invitation dynamic. For a list of common visitor attributes, see Table 1.

Note: *If common visitor attributes are included in the HTML, but the Support Dynamic text tags is not checked, the code of the visitor attribute will be displayed.*

Using Invitations

Invitations can be used as the outcome of rules or by specifying the default invitation to use in the Page Code Builder. Rules allow you to react to customer activity on your website. All rules must be created within a specific rule type.

The following actions can be use for chat and call invitations:

- Invite Visitor for chat
- Invite Visitor for call

These actions can be used in the following rule types:

- When visitor enters page
- While visitor is browsing site

Note: *For more information on rules, refer to the Contact Center manual.*

Page Code Builder and Selecting Invitations

The Page Code Builder, located at **Account Set Up** > **Page Code Builder** > **Chat/Voice Button** (tab) > **Add Invitation** (area). Is an area where you can select and preview an invitation from those in the Invitation library. This enables you to compare the look and feel of invitations with certain button types, which are aldo displayed in the Page Code Builder.

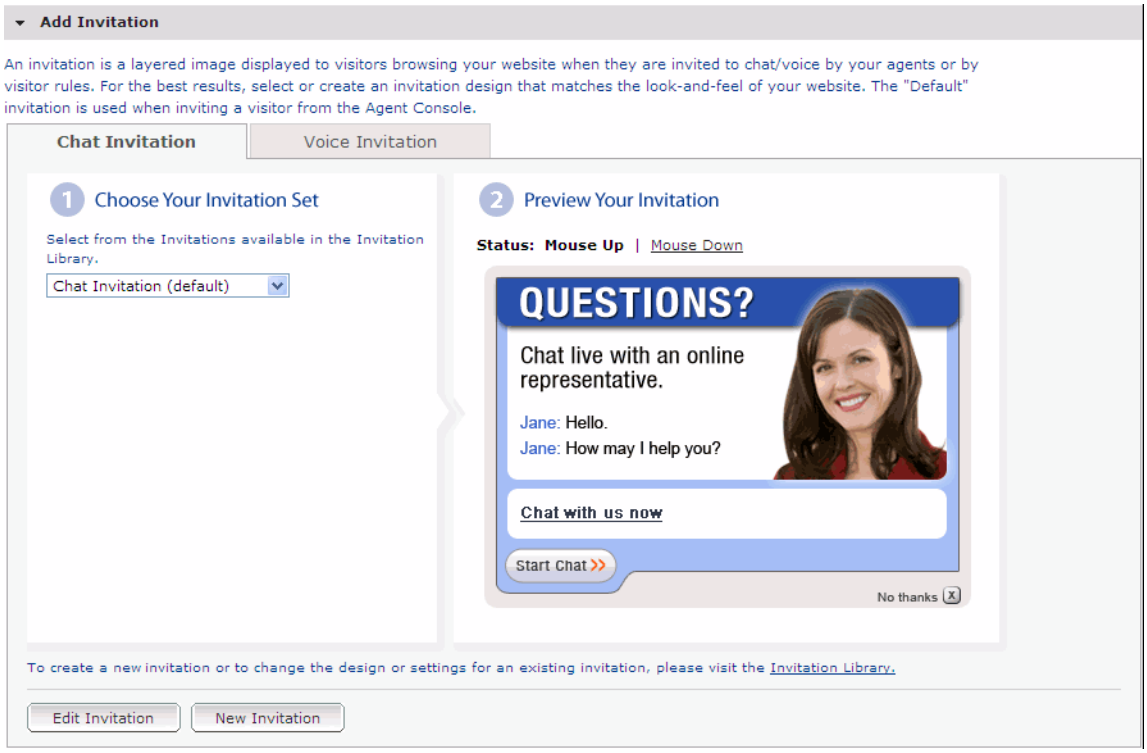

Figure 1-11: *Invitation Section in the Page Code Builder*

Selecting to edit or create a new invitation takes you to the Add/Edit Invitation page, located in **Visitor Experience** > **Chat/Voice** > **Invitations** (tab).

Related Documents

- Call Window Editor - Data Sheet
- Multichannel Invitations - Data Sheet

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