

Multichannel Dynamic Buttons

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Data Sheet



LIVEPERSON

Introduction

The Multichannel Dynamic Buttons feature enables you to display and control the states of both Click-to-Chat (Chat) and Click-to-Talk (Voice) buttons simultaneously. This provides website visitors with the flexibility to choose the appropriate interaction channel. The Dynamic Buttons and their states (that is Online, Offline or Busy) are controlled by the Rule Engine. The Conversion reports display how many Chat or Voice buttons were clicked as a result of Multichannel Dynamic Buttons and the conversions rates for these buttons. Multichannel Dynamic Buttons is a limited availability feature that requires the LivePerson Monitor Tag.

Creating Dynamic Buttons

You create and edit Multichannel Dynamic buttons in the Admin Console. The Multichannel Dynamic buttons are located in a container which includes both a Chat and a Voice button and an optional background image. You need to specify settings such as the position and the path to the graphics, refresh rate, how the Dynamic buttons are displayed in relation to other page objects, and mouseover text. An example that highlights the different areas of the Multichannel Dynamic buttons is displayed below.

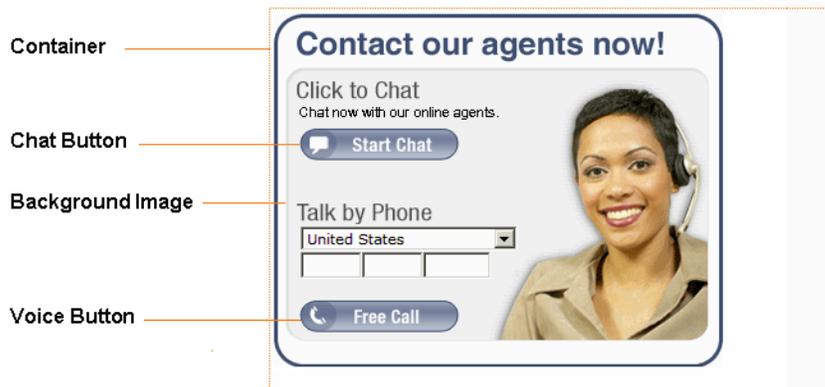


Figure 1-1: *Multichannel Buttons*

Note: *Once you create the Dynamic buttons, you will still need to deploy code on your web page to display the buttons.*

To create Multichannel Dynamic buttons:

- 1 From the Admin Console menu, select **Visitor Experience > Multichannel > Dynamic Buttons** (tab). The Dynamic Buttons page is displayed.

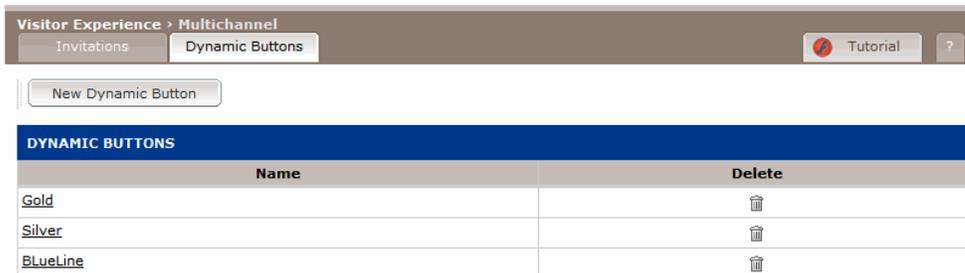


Figure 1-2: *Dynamic Buttons Page*

This page lists the available Dynamic buttons. To edit a Dynamic button, click the button name in the Name column. To delete a button, click the button.

- 2 Click **New Dynamic Button**. The Add/Edit Dynamic Button page is displayed.

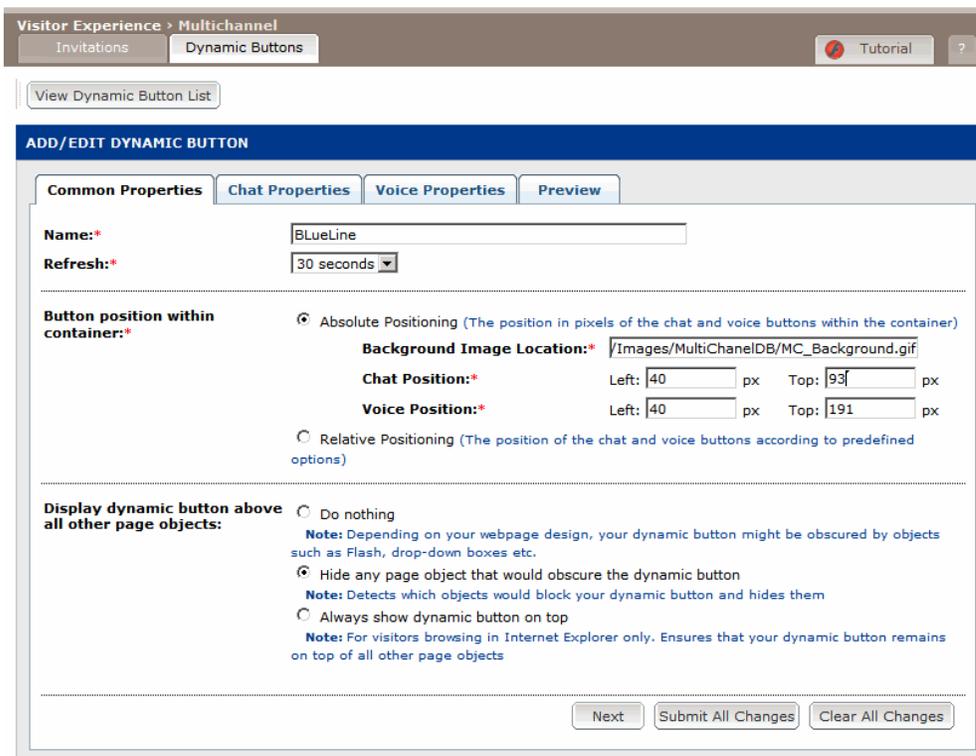


Figure 1-3: *Add/Edit Multichannel Button*

This page includes the Common Properties, Chat Properties, Voice Properties, and Preview tabs. These tabs are used to define the various parts of the Dynamic button and to preview your changes. The tabs are explained in the following sections.

Common Properties

The Common Properties tab specifies the position of the buttons within the container. It includes the name, refresh rate, button position within the container, and how to display the Dynamic buttons.

To specify the position of the Dynamic buttons within the container:

- 1 Enter a name for the Dynamic button.
- 2 Select the Refresh rate for the state of the button. The options are None (default option), 30, 60, or 90 seconds.
- 3 Define the position of the Chat and Voice buttons within the container, as follows:
 - ❖ **Absolute Positioning:** The Dynamic buttons are positioned using absolute coordinates. Specify the location of the background image, as well as the Left and Top coordinates in pixels. The position is measured from the top left corner of the container. Absolute Positioning can be used when you want to show both buttons irrespective of the state, or when it is not important if one of the buttons is not displayed.

Note: *The background image will remain the same size even if one of the buttons is not displayed. That is, the background image will not shrink to the size of the button.*

- ❖ **Relative Positioning:** The Dynamic buttons are positioned relative to each other using predefined options, without a background image. Relative Positioning can be used when you do not want to display a button with an offline state. Select one of the following options:



Note: *If a button is not displayed the container will shrink to the size of the button.*

- 4 Select one of the following options to prioritize the display of the Dynamic buttons in relation to other page objects:
 - ❖ **Do nothing:** Leave the settings as is, however the Dynamic buttons may be obscured by other objects. Depending on your web page design, your Dynamic buttons might be obscured by objects such as Flash and drop-down boxes.
 - ❖ **Hide any page object that would obscure the Dynamic buttons:** Detects which objects would block your Dynamic buttons and hides these objects.
 - ❖ **Always show dynamic button on top:** Ensures that your Dynamic buttons remain on top of all other page objects. This option is only available for visitors browsing in Internet Explorer.
- 5 Click the **Preview** tab to preview the Dynamic buttons. If you are using Absolute Positioning, you can refine the position of the buttons in the Preview tab using the Drag and Drop option. Click the **Enable** button to drag the buttons to the desired location and then click the **Apply** button to update the position coordinates.
- 6 Click **Next** to proceed to the Chat Properties tab, click **Submit All Changes** to save all changes and go back to the Dynamic buttons page, or click **Clear All Changes** to clear all fields and go back to the Dynamic buttons page.



Chat Properties

The Chat Properties tab enables you to set the location of the Chat button images as well as the mouseover text of the Chat button.

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View Dynamic Button List

ADD/EDIT DYNAMIC BUTTON

Common Properties Chat Properties Voice Properties Preview

Name: BlueLine

Chat Name:* BlueLine-Chat

Chat Image Location:*
 Image Path:(the path to the predefined images)
Image Path: http://Chat/ImagesMCDynamic/
 Custom Images:(specify the path to each image individually)

Chat Button Title:* Click to Chat With an Online Representative

< Back Next > Submit All Changes Clear All Changes

Figure 1-4: Chat Properties Tab

To specify the chat properties:

- 1 In the **Chat Properties** tab use the default name or enter a new name in the Chat Name box. The name you enter here is used in the rules to specify this Chat button.
- 2 Select the location of the chat images, as follows:
 - ❖ **Image Path:** Enter the path to the predefined chat images. Each image represents a different state. The images located here must follow the file naming convention as indicated below:

State	File Name	Description
Online	MC_Online.gif	Agent is online
Offline	MC_Offline.gif	Agent is offline
Busy	MC_Occupied.gif	Agent is busy
Alternate	MC_Alternate.gif	This is an additional button state
Default	MC_Transparent.gif	This is the initial or default state of the button. The image for this state is mandatory.

❖ **Custom Images:** Specify the path to each image individually. Each image represents a different state. LivePerson recommends that the file names follow the file naming conventions indicated in the previous table. Specify the path to the images for the following states: Online, Offline, Busy, Alternate, and Default.

- 3 Enter the text of the ToolTip that is displayed when visitors mouseover the Chat button.
- 4 Click the **Preview** tab to preview the Dynamic buttons.
- 5 Click **Back** to go to the previous page, click **Next** to proceed to the Voice Properties tab, click **Submit All Changes** to save all changes and go back to the Dynamic Buttons page, or click **Clear All Changes** to clear all fields and go back to the Dynamic Buttons page.

Voice Properties

The Voice Properties tab enables you to set the position and mouseover text of the Voice button, and to select the Voice Type (Single-Step or Dual-Step). The Single-Step settings are explained next. For information on the Dual-Step settings, see [“Dual-Step Voice Type” on page 10](#).

Single-Step Voice Type

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



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View Dynamic Button List

ADD/EDIT DYNAMIC BUTTON

Common Properties Chat Properties **Voice Properties** Preview

Name: BLUELine
Voice Name:* BLUELine-Voice
Voice Type:* Single-Step
Voice Image Location:* Image Path: (Specify the path to the predefined images)
Image Path: http://ishayt/DYCMCButtonsEfim/
 Custom Images: (specify the path to each image individually)
Mouseover Text - Voice Button:* Click to Talk With an Online Representative

Call Button

Position:* Left: 150 px Top: 100 px

Phone Number

The customer will be able to choose from three phone number input conventions:
Phone Number Input:* US Format
US: 3 3 4
Min Phone Number Length:* 10
Position:* Left: 7 px Top: 100 px

Pre Populate phone number

Choose Countries

Choose Countries:
Afghanistan Albania Algeria Andorra Angola Anguilla United States
 Show country selection

< Back Next > Submit All Changes Clear All Changes

Figure 1-5: *Voice Properties – Single-Step*

To specify the single-step voice properties:

- 1 In the **Voice Properties** tab use the default name or enter a new name in the Voice Name box. The name you enter here is used in the rules to specify this Voice button.
- 2 Select the Single-Step option.

3 Select the location of the voice image, as follows:

- ❖ **Image Path:** Specify the path to the predefined Voice (Call Button) and Background images. The images must follow the file naming conventions as indicated below:

State	Call Button Image	Background Image
Online	MC_OneStepVoiceButtonOnline.gif	MC_OneStepVoiceOnline.gif
Offline	MC_OneStepVoiceButtonOffline.gif	MC_OneStepVoiceOffline.gif
Busy	MC_OneStepVoiceButtonOccupied.gif	MC_OneStepVoiceOccupied.gif
Alternate	MC_oneStepVoiceButtonAlternate.gif	MC_oneStepVoiceAlternate.gif
Default	MC_OneStepVoiceButtonTransparent.gif	MC_oneStepVoiceTransparent.gif. The image for this state is mandatory.

- ❖ **Custom Images:** Specify the path to each image individually. Each image represents a different state. You can specify the Voice Call Button images as well as the background images. LivePerson recommends that the file names follow the file naming conventions indicated in the previous table. Specify the path to the images for the following states: Online, Offline, Busy, Alternate, and Default.

- 4 Enter the text of the ToolTip that is displayed when visitors mouseover the Voice button.
- 5 Define the left and top position coordinates of the Call button in pixels.
- 6 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.
- 7 Enter the Minimum Phone Number Length. The system will verify that all phone number lengths are greater than the specified number.
- 8 Define the left and top coordinates of the Phone Number area in pixels.
- 9 To fill in the phone number that the visitor entered on a previous visit, select the **Pre Populate phone number** 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 the **Preview** tab to preview the Dynamic buttons.
- 13 Click **Back** to go to the previous page, click **Next** to proceed to the Preview tab, click **Submit All Changes** to save all changes and go back to the Dynamic Buttons page, or click **Clear All Changes** to clear all fields and go back to the Dynamic Buttons page.

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 (Voice) button, and in the second step the visitor enters their country, if required, and phone number details in the Pre Call window. The Voice Properties tab for the Dual-Step voice type is displayed next.

The screenshot shows the 'ADD/EDIT DYNAMIC BUTTON' form in the LivePerson interface. The 'Voice Properties' tab is selected, showing the following fields and options:

- Name:** BlueLine
- Voice Name:*** BlueLine-Voice
- Voice Type:*** Dual-Step (selected from a dropdown menu)
- Voice Image Location:***
 - Image Path:(the path to the predefined images)
 - Image Path:** https://efim/tests/Images/MultiChanelDE
 - Custom Images:(specify the path to each image individually)
- Voice Button Title:*** Click to Talk With an Online Representative

At the bottom of the form, there are four buttons: '< Back', 'Next >', 'Submit All Changes', and 'Clear All Changes'.

Figure 1-6: Voice Section Tab – Dual-Step

To specify the dual-step voice properties:

- 1 In the **Voice Properties** tab use the default name or enter a new name in the Voice Name box. The name you enter here is used in the rules to specify this voice button.
- 2 Select the Dual-Step option.

3 Select the Voice image location that you want to use:

- ❖ **Image Path:** Enter the path to the predefined voice images. Each image represents a different state. The file names must follow the file naming convention as indicated below:

State	File Name	Description
<i>Online</i>	MC_VoiceOnline.gif	Agent is online for Voice
<i>Offline</i>	MC_VoiceOffline.gif	Agent is offline for Voice
<i>Busy</i>	MC_VoiceOccupied.gif	Agent is busy
<i>Alternate</i>	MC_VoiceAlternate.gif	This is an additional button state
<i>Default</i>	MC_VoiceTransparent.gif	This is the initial or default state of the button. The image for this state is mandatory.

- ❖ **Custom Images:** Specify the path to each image individually. Each image represents a different state. You can specify the Voice (Call Button) images but no background images. LivePerson recommends that the file names follow the file naming conventions indicated in the previous table. Specify the path to the images for the following states: Online, Offline, Busy, Alternate, and Default.

4 Enter the mouseover text for the Voice button.

5 Click the **Preview** tab to preview the Dynamic Buttons.

6 Click **Back** to go to the previous page, click **Next** to proceed to the Preview tab, click **Submit All Changes** to save all changes and go back to the Dynamic Buttons page, or click **Clear All Changes** to clear all fields and go back to the Dynamic Buttons page.

Creating Rules for Multichannel Buttons

Once you have created Multichannel Dynamic buttons you can add Visitor rules to determine when the buttons and states are displayed to visitors. The Rule Types tab provides an easy way to manage and categorize rules according to specific categories of Rule Types. Within the Rule Types you can add new visitor rules that specifically relate to Multichannel Dynamic buttons.

Note: *This section highlights the rules that relate to Multichannel Dynamic buttons. For full details about rules and how they work, refer to the Contact Center manual.*

To create rules for Multichannel Dynamic buttons:

- 1 From the Admin Console menu, select **Rules > Visitor Rules > Rule Types** (tab). The Rule Types Manager page is displayed.
- 2 Click the **New Custom Rule Type** button.
- 3 Select one of the following Multichannel Rule Types from the Rules Type Manager:
 - ❖ **When visitor clicks dynamic button:** These rules are processed to determine the action to be taken when a visitor clicks a Dynamic button that was displayed. You need to create separate rules for the Chat and Voice buttons and indicate the names of the buttons as displayed in the Chat Name box in the Chat Properties tab and Voice Name box in the Voice Properties tab. This Rule Type is optional.
 - ❖ **When visitor requests button impression:** These rules are processed to determine the impression state of the dynamic button. You need to create separate rules for the Chat and Voice buttons and indicate the names of the buttons as displayed in the Chat Name box in the Chat Properties tab and Voice Name box in the Voice Properties tab. This Rule Type is mandatory.

Once a Rule Type is selected, the Rule Type Details page is displayed.



Figure 1-7: *Rules Type Detail Page*

- 4 Enter a brief description for the Rule Type.
- 5 Select to enable or disable the Rule Type. The Rule Type is enabled by default.
- 6 Click the **Submit All Changes** button.
- 7 Now you can add the rules for the Dynamic buttons. You should create separate rules for both the Chat and Voice buttons. An example is displayed next.

Rules > Visitor Rules

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Back to Rule Types

RULE TYPE DETAILS

Rule Type: When visitor requests button impression

Parameters: Button Name: BLueLine-Chat

Name: When visitor requests button impression - B

Description: Multichannel Chat button

Status: Enabled

Rules

New Rule

Campaign	Name	Description	Segment	Conditions/Actions	Status
	there are available operators 1	there are available operators	All Visitors	If there are available operators do set button impression to 'Available' and stop processing	● 🗑️
	there is at least one operator online 2	there is at least one operator online	All Visitors	If there is at least one operator online do set button impression to 'Busy' and stop processing	● 🗑️
	set button impression to 'Offline' 2		All Visitors	Always do set button impression to 'Offline'	● 🗑️

Submit All Changes Clear

Figure 1-8: Example Rules

Reporting and Analytics

The Conversion reports compare the buttons that were clicked as a result of single channel buttons versus Multichannel buttons and the conversion rates for these buttons. If an account does not have the Multichannel feature, there will be no change to the Conversion reports.

Note: *Multichannel events will not be calculated as part of the Admin Console Scoreboards.*

Conversion Summary Report

The Conversion Summary report provides a comparison between chat and voice channels as it relates to the number of actual interactions and associated conversions, while indicating the origin of the interactions as either stand-alone or multichannel.

This report includes the following Interaction types: "Multichannel button Chat" and "Multichannel button Voice" in addition to the existing "Button Chat" and "and "Button Voice" types. This provides an indication of how many Chat/Voice buttons were clicked as a result of Multichannel buttons and the conversion rate, and compares it to how many Chat/Voice buttons were clicked as a result of standalone Chat/Voice buttons and the conversion rate. A partial example of this report is shown in the following figure.

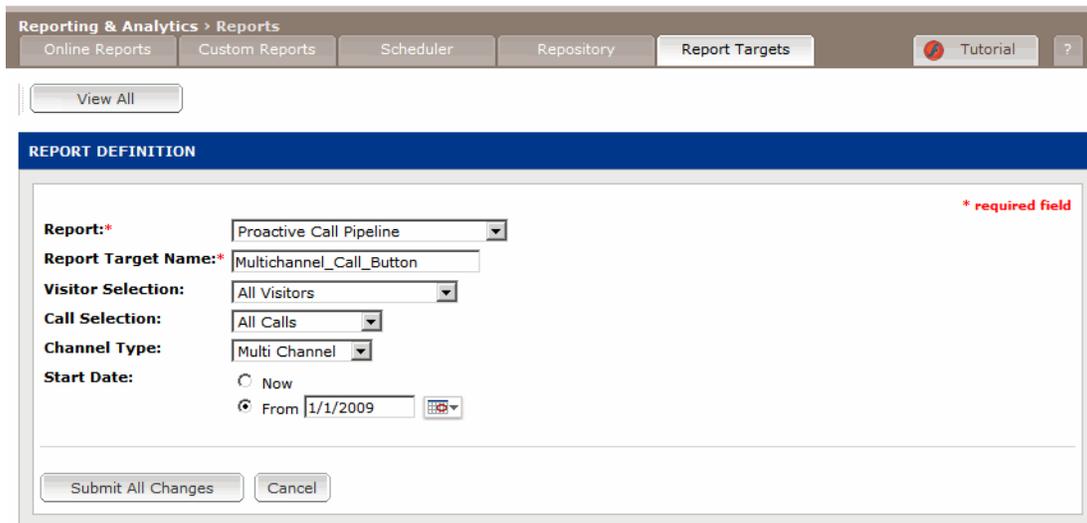
Total Assisted Conversions by Conversion Room							
Group By: Room , Interaction Type and Visitor Type							
Room	Int. Type	Visitor Type	Visitors to Room	Int. Started in Room	Int. Transferred in Room	Total Conv. Credit	Conv. Credit for In-Room Int.
Skill8	Total		2	0	0	0.00	0.00
Sales	Total		99	30	0	16.00	12.18
Sales	Static Button Voice	Hot Lead	99	10	0	4.22	2.90
Sales	Static Button Chat	Hot Lead	99	5	0	1.95	1.95
Sales	Static Button Chat	Cold Lead	0	0	0	0.50	0.00
Sales	Multichannel button Voice	Hot Lead	99	4	0	1.00	1.00
Sales	Multichannel button Chat	Hot Lead	99	1	0	0.33	0.33
Sales	Button Voice	Hot Lead	99	8	0	6.00	4.00
Sales	Button Chat	Hot Lead	99	2	0	2.00	2.00
RSCB	Total		9	9	0	0.00	0.00
RSCB	Static Button Voice	Cold Lead	9	2	0	0.00	0.00
RSCB	Static Button Chat	Cold Lead	9	1	0	0.00	0.00
RSCB	Multichannel button Voice	Cold Lead	9	2	0	0.00	0.00
RSCB	Button Voice	Hot Lead	0	2	0	0.00	0.00
RSCB	Button Voice	Cold Lead	9	2	0	0.00	0.00

Figure 1-9: Conversion Summary Report

Proactive Call Pipeline and Proactive Chat Pipeline Reports

The report target for the Proactive Call Pipeline and the Proactive Chat Pipeline reports include a parameter called Channel Type, which is only displayed if the Multichannel feature is enabled. It can be set as follows:

- ◆ **Single Channel:** The report shows button clicks that were generated from single channel Chat Or Voice buttons.
- ◆ **Multi Channel:** The report shows buttons clicks which were generated from Multichannel Chat Or Voice buttons.



The screenshot shows the 'Report Definition' window in a software interface. The window title is 'Reporting & Analytics > Reports'. Below the title bar are several tabs: 'Online Reports', 'Custom Reports', 'Scheduler', 'Repository', 'Report Targets', 'Tutorial', and a help icon. A 'View All' button is located below the tabs. The main content area is titled 'REPORT DEFINITION' and contains the following fields:

- Report:** A dropdown menu with 'Proactive Call Pipeline' selected.
- Report Target Name:** A text input field containing 'Multichannel_Call_Button'.
- Visitor Selection:** A dropdown menu with 'All Visitors' selected.
- Call Selection:** A dropdown menu with 'All Calls' selected.
- Channel Type:** A dropdown menu with 'Multi Channel' selected.
- Start Date:** Radio buttons for 'Now' and 'From'. The 'From' option is selected, with a date input field containing '1/1/2009' and a calendar icon.

At the bottom of the form are two buttons: 'Submit All Changes' and 'Cancel'. A red asterisk and the text '* required field' are visible in the top right corner of the form area.

Figure 1-10: Report Target – Channel Type

Sale Summary Report

The Sale summary report includes chats and calls that originated from Multichannel buttons. These are displayed as proactive chats and proactive calls.

Additional Information

For additional information refer to the following document:

- ◆ Multichannel Invitations Data Sheet

