

Invitation Rules - Best Practices

July 2009

Best Practice Guide



LIVEPERSON

Introduction

This guide provides a list of best practices for Invitation Rules. LivePerson considered online visitor behaviors that could signify abandonment (such as time spent on a specific page) and defined how best to use Invitation Rules. The best practices for Invitation Rules can help you decrease abandonment by engaging online visitors to chat with you based on their browsing behavior.

Each best practice is a standalone procedure that contains tasks. Each best practice procedure includes the following components:

- ◆ Who Should Complete this best practice procedure?
- ◆ What will you learn?
- ◆ What will you need?
- ◆ Recommended Reading
- ◆ Steps to Complete

The following table displays the list of best practice procedures and learning outcomes that administrators should complete.

Table 1: Procedures and learning outcomes presented in this guide

Procedure Name	Learning Outcome	Time to Complete
Procedure 1: Logging in and Accessing Visitor Rule	<ul style="list-style-type: none">◆ Logging into the admin console◆ Accessing the Visitor Rules	5 min
Procedure 2: Adding the Time-Based Chat Auto Invite rule	<ul style="list-style-type: none">◆ Adding a rule that automatically sends chat invitations to all visitors who spend a minute or more on your site to chat (optimizes chat volume and increases conversion rates)	10 min
Procedure 3: Adding the Search Engine Auto Invite rule	<ul style="list-style-type: none">◆ Adding a rule that automatically sends chat invitations to visitors who reach your site via a search engine query.	10 min
Procedure 4: Adding the Repeat Visitors Auto Invite rule	<ul style="list-style-type: none">◆ Adding a rule that invites Repeat site visitors to chat with an agent	10 min
Procedure 5: Adding the US Visitors Chat Invite rule	<ul style="list-style-type: none">◆ Adding a rule that invites visitors based on their Geographical Location	10 min



Procedure 1: Logging in and Accessing Visitor Rules

Who Should Complete this Procedure?

LivePerson Contact Center and LivePerson Pro Administrators

What will you learn?

In this procedure, you will log into the admin console and access Visitor Rules.

What will you need?

- ◆ Your **LivePerson Account Number**
- ◆ Your **User Id**
- ◆ Your **Password**

Recommended Reading

[LivePerson Pro - Administrator - Visitor Rules](#)

[LivePerson Contact Center - Administrator - Visitor Rules](#)

Steps to Complete:

- 1 Login to the Liveperson Admin Console.
- 2 Enter your **LivePerson Account Number**.
- 3 Enter your **User Id**.
- 4 Enter your **Password**.
- 5 Select the **Submit** button.
- 6 From the menu, select **Rules**.
- 7 Select **Visitor Rules**.



LIVEPERSON

LP 25272558
Maya

Rules > Visitor Rules

Visitor Rules Tutorial ?

Add Rule Add Examples Rules List

VISITOR RULES

View rule types:

No rules defined

Submit All Changes Clear

[back to top](#)

Figure 1: Logging in and accessing visitor rules

Procedure 2: Adding a Time-Based Chat Auto Invite rule

Who Should Complete this Procedure?

LivePerson Contact Center and LivePerson Pro Administrators

What will you learn?

In this procedure, you will establish a rule that automatically sends chat invitations to all visitors who spend a minute or more on your site.

What will you need?

Complete Procedure 1: Logging in and Accessing Visitor Rules

Recommended Reading

[LivePerson Pro - Administrator - Visitor Rules](#)

[LivePerson Contact Center - Administrator - Visitor Rules](#)

Steps to Complete:

- 1 From the **View Rule Type** list, select **When visitor enters the page**.
- 2 Select the **Add Rule** button.
- 3 In the **Name** field, type *Time-Based Chat Auto Invite*
- 4 In the **Description** field, type *Automatically sends chat invitations to all visitors who spend 3 minutes or more on a certain page on your site.*
- 5 From the **Status** list, select **Enabled**.
- 6 Select the **Add Condition** link.
- 7 From the list, select **Operators - Online Operators**.
- 8 Select the **Add Condition** link again to add a second condition.
- 9 From the list, select **Browsing, Current Page**.
- 10 From the **visitor's current page's URL or title contains** drop down box, select **The exact phrase (ignore case)** and enter the URL of the page you wish to invite visitors from.
- 11 Select the **green checkmark** button to apply your changes.
- 12 Click on **Add Action** and select **Visitor Experience**.
- 13 From the **Action** list, select **Invite visitor for chat after Time on page** and define the number of seconds to wait before inviting the visitor.
- 14 Select the Chat invitation to be used with this rule.
- 15 Select the **green checkmark** button to apply your changes.
- 16 Select **Update All** to apply your changes.
- 17 Select **Submit All Changes**.



LIVEPERSON

- LP 25272558
Maya
- News
- Account Set Up
- User Set Up
- Visitor Experience
- Content Management
- Rules
 - Visitor Rules
 - Ticketing Rules
- Reporting & Analytics

Rules > Visitor Rules

Visitor Rules

Back

VISITOR RULES

Name: Time-based Chat invitation

Description: Automatically sends chat invitations to all visitors who spend 3 minutes or more on a certain page on your site

Rule Type: When visitor enters page

Status: Enabled

If All of the following conditions are true:

there is at least one operator online	Edit	🗑️
the visitor's current page's URL or title contains the exact phrase (ignore case) 'shopping.htm'	--	🗑️
Add Condition		

Then perform these actions:

Invite visitor for chat after '180' seconds on page using predefined invite 'Chat Invitation'	Edit	🗑️
Add Action		

Stop processing after this rule

Update All | Cancel

Figure 2: Adding a time-based Chat invitation rule

Procedure 3: Adding the Search Engine Auto Invite rule

Who Should Complete this Procedure?

LivePerson Contact Center and LivePerson Pro Administrators

What will you learn?

In this procedure, you will establish a rule that automatically sends chat invitations to all visitors who reach your site via a search engine query.

What will you need?

Complete Procedure 1: Logging in and Accessing Visitor Rules

Recommended Reading

[LivePerson Pro - Administrator - Visitor Rules](#)

[LivePerson Contact Center - Administrator - Visitor Rules](#)

Steps to Complete:

- 1 From the **View Rule Type** list, select **When visitor enters the page**.
- 2 Select the **Add Rule** button.
- 3 In the **Name** field, type *Search Engine Auto Invite*
- 4 In the **Description** field, type *Automatically sends chat invitations to visitors who reach your site via a search engine query.*
- 5 From the **Status** list, select **Enabled**.
- 6 Select the **Add Condition** link.
- 7 From the list, select **Browsing - Search Engine Found**.
- 8 Select the **green checkmark** button to apply your changes.
- 9 Select the **Add Condition** link.
- 10 From the list, select **Operators - Online Operators**.
- 11 Select the **green checkmark** button to apply your changes.
- 12 Select the **Add Action** link.
- 13 From the **Type** list, select **Visitor Experience**.
- 14 From the **Action** list, select **Invite Visitor for Chat**.
- 15 Select the Chat invitation to be used in this rule.
- 16 Select the **green checkmark** button to apply your changes.
- 17 Select **Update All** to apply your changes.
- 18 Select **Submit All Changes**.

LP 25272558
Maya

Rules > Visitor Rules

Visitor Rules

?

Back

- News
- ▶ Account Set Up
- ▶ User Set Up
- ▶ Visitor Experience
- ▶ Content Management
- ▶ Rules
 - Visitor Rules
 - Ticketing Rules
- ▶ Reporting & Analytics

VISITOR RULES

Name: Search Engine Auto Invite

Description: Automatically sends chat invitations to visitors who reach your site via a search engine query.

Rule Type: When visitor enters page

Status: Enabled

If All of the following conditions are true:		
there is at least one operator online	--	
the referrer is a search engine	--	
Add Condition		

Then perform these actions:		
Invite visitor for chat using predefined invite Chat Invitation	--	
Add Action		

Stop processing after this rule

Update All Cancel

Figure 3: Adding the search engine invite rule

Procedure 4: Adding the Repeat Visitors Auto Invite rule

Who Should Complete this Procedure?

LivePerson Contact Center and LivePerson Pro Administrators

What will you learn?

In this procedure, you will establish a rule that automatically invites repeat site visitors to chat with an agent.

What will you need?

Complete Procedure 1: Logging in and Accessing Visitor Rules

Recommended Reading

[LivePerson Pro - Administrator - Visitor Rules](#)

[LivePerson Contact Center - Administrator - Visitor Rules](#)

Steps to Complete:

- 1 From the **View Rule Type** list, select **When visitor enters the page**.
- 2 Select the **Add Rule** button.
- 3 In the **Name** field, type *Repeat Visitors Auto Invite*.
- 4 In the **Description** field, type *Invite Repeat site visitors to chat with an agent*.
- 5 From the **Status** list, select **Enabled**.
- 6 Select the **Add Condition** link.
- 7 From the list, select **Visitor Properties - Repeat Visit**.
- 8 Select the **green checkmark** button to apply your changes.
- 9 Select the **Add Condition** link.
- 10 From the list, select **Operators - Online Operators**.
- 11 Select the **green checkmark** button to apply your changes.
- 12 Select the **Add Action** link.
- 13 From the **Type** list, select **Visitor Experience**.
- 14 From the **Action** list, select **Invite Visitor for Chat**.
- 15 Select the Chat invitation to be used in this rule.
- 16 Select the **green checkmark** button to apply your changes.
- 17 Select **Update All** to apply your changes.
- 18 Select **Submit All Changes**.



LIVEPERSON

LP 25272558
Maya

Rules > Visitor Rules

Visitor Rules

?

Back

- News
- ▶ Account Set Up
- ▶ User Set Up
- ▶ Visitor Experience
- ▶ Content Management
- ▶ Rules
 - Visitor Rules
 - Ticketing Rules
 - ▶ Reporting & Analytics

VISITOR RULES

Name: Repeat Visitors Auto Invite

Description: Invite Repeat site visitors to chat with an agent.

Rule Type: When visitor enters page

Status: Enabled

If All of the following conditions are true:

repeat visit to the site	--	🗑️
there is at least one operator online	--	🗑️
Add Condition		

Then perform these actions:

Invite visitor for chat using predefined invite Chat Invitation	--	🗑️
Add Action		

Stop processing after this rule

Update All Cancel

Figure 4: Adding a repeat visitor invitation rule

Procedure 5: Adding the US Visitors Chat Invite rule

Who Should Complete this Procedure?

LivePerson Contact Center and LivePerson Pro Administrators

What will you learn?

In this procedure, you will establish a rule that automatically invites visitors based on their geographical location.

What will you need?

Complete Procedure 1: Logging in and Accessing Visitor Rules

Recommended Reading

[LivePerson Pro - Administrator - Visitor Rules](#)

[LivePerson Contact Center - Administrator - Visitor Rules](#)

Steps to Complete:

- 1 From the **View Rule Type** list, select **When visitor enters the page**.
- 2 Select the **Add Rule** button.
- 3 In the **Name** field, type *US Visitors Chat Invite*.
- 4 In the **Description** field, type *Invite visitors based on their Geographical Location*.
- 5 From the **Status** list, select **Enabled**.
- 6 Select the **Add Condition** link.
- 7 From the list, select **Misc - GEO Attribute**.
- 8 From the **GEO Attribute** list, select **Country**.
- 9 Then select **equal to**.
- 10 Type *United States* in the **GEO Attribute** field.
- 11 Select the **green checkmark** button to apply your changes.
- 12 Select the **Add Condition** link.
- 13 From the list, select **Time Functions - Time In Site**.
- 14 From the **time on the site** list, select **>**.
- 15 Type *180* in the **time on the site** field.
- 16 Select the **green checkmark** button to apply your changes.
- 17 Select the **Add Condition** link.
- 18 From the list, select **Operators - Online Operators**.
- 19 Select the **green checkmark** button to apply your changes.
- 20 Select the **Add Action** link.
- 21 From the **Type** list, select **Visitor Experience**.



LIVEPERSON

- 22 From the **Action** list, select **Invite Visitor for Chat**.
- 23 Select the Chat invitation to be used in this rule.
- 24 Select the **green checkmark** button to apply your changes.
- 25 Select **Update All** to apply your changes.
- 26 Select **Submit All Changes**.

The screenshot shows the LivePerson interface for configuring a Visitor Rule. The user is logged in as Maya (LP 25272558). The navigation menu on the left includes News, Account Set Up, User Set Up, Visitor Experience, Content Management, Rules (selected), Visitor Rules (highlighted), Ticketing Rules, and Reporting & Analytics. The main content area is titled 'Rules > Visitor Rules' and contains a 'Back' button. The 'VISITOR RULES' configuration panel is active, showing the following details:

- Name:** US Visitors Chat Invite
- Description:** Invite visitors based on their Geographical Location
- Rule Type:** When visitor enters page
- Status:** Enabled

The rule is configured with the following conditions and actions:

If All of the following conditions are true:		
The GEO Attribute 'Country' equal to 'United States'	--	🗑️
time on the site > '180' seconds	--	🗑️
there is at least one operator online	--	🗑️
Add Condition		
Then perform these actions:		
Invite visitor for chat using predefined invite Chat Invitation	--	🗑️
Add Action		

At the bottom of the configuration panel, there is an unchecked checkbox for 'Stop processing after this rule' and two buttons: 'Update All' and 'Cancel'.

Figure 5: Inviting US visitors to chat

This document is for informational purposes only. LIVEPERSON, INC. PROVIDES THIS DOCUMENT "AS IS" WITHOUT WARRANTY OF ANY KIND, EITHER EXPRESS OR IMPLIED, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE.

No part of this document may be reproduced, stored in or introduced into a retrieval system, or transmitted in any form or by any means (electronic, mechanical, photocopying, recording, or otherwise), without the prior written permission of LivePerson, Inc., except as otherwise permitted by law. Prior to publication, reasonable effort was made to validate this information. Actual savings or results achieved may be different than those outlined in the document. This document could include technical inaccuracies or typographical errors.

Timpani, SmartBar and LiveCall are trademarks or registered trademarks of LivePerson, Inc. in the United States and/or other countries All other company and product names mentioned are used only for identification purposes and may be trademarks or registered trademarks of their respective companies.

© 2008 LivePerson, Inc. All rights reserved.



LIVEPERSON