

# Custom Button Library & Page Code Builder

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*Data Sheet*



LIVEPERSON

## Introduction

The Custom Button Library is the area in the Admin Console where you create and edit Button Types (Chat Button, Chat Box, Chat Link, Voice Button and Voice Link). Buttons enable visitors to request a chat or call with an agent. You can add any number of buttons to any number of pages on your website. The buttons that are created in the Custom Button Library generate HTML code which is obtained from the Page Code Builder.

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**Note:** *Voice buttons are only available for accounts that include the Voice channel.*

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From the drop-down menus within the Page Code Builder you select from the buttons that exist within the Button Library, and copy and deploy the code on the Web pages where you want to display the button. If subsequent changes are made to a button within the Button library, these changes are automatically implemented in all the places where the buttons have been deployed on your website(s).

In addition to the code for Button Types, the Page Code Builder also contains the HTML for the Monitor Code which allows for real-time monitoring of your website traffic and enables features such as LiveEngage, CoBrowse, Navigation Tracking, and Campaign Viewer.

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**Note:** *LivePerson recommends that you embed the Monitor Code on every page.*

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The Page Code Builder also contains an area where you can create and edit Invitations. These are layered graphics (rather than an actual pop-ups) that appear to visitors browsing your website, and invites them to chat or talk to your agents. For more information refer to the Invitations Data Sheet.

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**Note:** *Invitations are included in the Page Code Builder (even though they do not generate code) for the following reasons:*

- *Both Invitations and Buttons are a means in which to engage a visitor into a chat or call.*
  - *You can compare the look and feel of both invitations and buttons, as they are both displayed within the same page.*
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## Quick Start Guide

The majority of this document details how to create, deploy and edit buttons. This section, however, is a quick reference for those who want to quickly set up a button on their website. This section also includes a description of how to add Monitor Code to the pages on your site.

**To deploy buttons on your website:**

- 1 From the Admin Console menu, select **Account Set Up** > **Page Code Builder**. The Page Code Builder is displayed.

The screenshot displays the 'PAGE CODE BUILDER' interface. At the top, a yellow banner reads 'Adding and Managing Your Buttons Just Got Even Easier!' with an 'Open' link. Below this, the 'Get Your Button Code' section is active, showing tabs for 'Chat Button', 'Chat Box', 'Chat Link', 'Voice Button', and 'Voice Link'. The 'Chat Button' tab is selected, showing a three-step process: 1. 'Choose Your Button Set' with a dropdown menu set to 'Standard Button 1 (default)'; 2. 'Preview Your Button' showing a 'LIVE HELP' button with 'I'm Online' status and a 'Start Chat' button; 3. 'Get Your Button Code' with a code editor containing HTML code and a 'Copy HTML Code' button. Below the preview, there are 'Edit Button' and 'New Chat Button' buttons. The 'Get Your Monitor Code' section follows, with a heading 'Enjoy the full benefit of your LivePerson service by ensuring you add the Monitor Code to all of your Web pages.' and a list of benefits: 'Monitor your website visitors in real-time', 'Proactively invite your visitors for a chat', and 'Track and review the browsing history of your visitors'. Step 4, 'Get Your Monitor Code', shows a code editor with JavaScript code and a 'Copy HTML Code' button. At the bottom, there is an 'Advanced' button and an 'Add Invitation' link.

Figure 1-1: Page Code Builder Page

- 2 Select one of the following Button Types. (Availability of certain Button Types depend on your account type and available channels). For each of these Button Types you can select: the design, the display options and add advanced options, all within the Custom Button Library:
  - ❖ **Chat Button:** Visitors request a chat by clicking on images embedded on your website.
  - ❖ **Chat Box:** Visitors request a chat by entering a question in a chat area embedded on your website.
  - ❖ **Chat Link:** Visitors request a chat using a text link.
  - ❖ **Voice Button:** Visitors request a call by clicking on images embedded on your website.
  - ❖ **Voice Link:** Visitors request a call using a text link.
- 3 From the drop-down menu select your preferred Button Set.
- 4 Preview the appearance of the button in the three statuses: online, offline and occupied.
- 5 Select the **Use Secure Links** check box if your site uses secure links (https://). This option requires that SSL will be enabled for your account. For set up options see: **Account Set Up > Settings**.
- 6 Click the **Copy HTML Code** button and paste the code where the button code should appear on your web pages.

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**Note:** *Make sure to paste the Button Code as is, without modifying it.*

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To customize the button images in order to correspond to the look and feel of your website, create a new button or change the design of an existing button, see the section "[Custom Button Library](#)" on page 5.

This is all that is required to deploy Button Types on your web pages. However in addition to adding Button Code, it is suggested to add Monitor Code to all your web pages, as explained in the section below.



## Monitor Code

To fully enjoy your LivePerson service, you must generate and embed both the Button Code and Monitor Code on each page of your website. The Monitor Code is a standard form of HTML which does not vary with any changes made to any of the Button Types. The Monitor Code is invisible to visitors, and enables you to monitor the activity of visitors as they browse your website and provides the ability to track visitors, invite them to chat or talk and fully utilize features such as: LiveEngage, CoBrowse, Navigation Tracking, and Campaign Viewer.

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**Note:** *To add routing options and tracking variables in relation to the Monitor Code, see the section [“Adding Routing Options and Tracking Variables within the Monitor Code”](#) on page 17.*

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### To use your Monitor Code:

- 1 Click the **Copy HTML Code** button (Displayed in Internet Explorer browser only).
- 2 Paste the code at the very bottom of your web page just before the `</body>` tag.

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#### Notes:

- i. *Make sure to paste the Monitor Code as is, without modifying it.*
  - ii. *The Monitor Code automatically uses the same SSL protocol as the page.*
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## Custom Button Library

The LivePerson Admin Console contains Custom Button Libraries, one for buttons that relate to chat (Chat Button, Chat Box, and Chat Link) and the other for buttons that relate to voice (Voice Button and Voice Link). The libraries are accessed in the following way:

- ◆ **Visitor Experience > Chat > Buttons** (tab)
- ◆ **Visitor Experience > Voice > Buttons** (tab)

Each of the libraries contain default buttons to help you get started, however you can create or edit existing buttons to correspond to the look and feel of your website. After you have deployed buttons on your web pages, the buttons can be customized within the library and the changes will appear immediately on your web pages without the need to revise any code in the Page Code Builder.

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**Note:** *Any changes made to a button in the library is directly reflected to the corresponding buttons deployed on the website. This means that you are able to change things like the button image, the position of the button and routing, directly in the library without the need to deploy any additional code.*

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## Planning Considerations

Before creating new buttons and deploying them on web pages, it is advisable to plan a strategy for your website in order to maximize the number of visitors you attract. Below is a list of some of the things you may want to think about:

- ◆ Consider the structure of your website. Divide the website into sections, and consider each section to be a specific skill, for example, sales, support, accounting.
- ◆ Create buttons that correspond to the sections you have created. For example, you may have three Chat Boxes that look the same but whose text vary, for example, "Chat to a Sales Rep", "Chat to a Support Rep" or "Chat to an Accounts Rep".
- ◆ Decide whether an invitation, button or both would be more appropriate for specific pages. For more information on invitations refer to the *Invitations Data Sheet*.

## Creating New Buttons

This section details how to create new buttons and the options that are available for each Button Type. Code is automatically generated as you create your button, and can be obtained either from the Button Library or the Page Code Builder.

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**Note:** *The full details of how to create a button is detailed in the "Creating a Chat Button" section. All the other button sections describe the unique settings.*

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- ◆ ["Creating a Chat Button" on page 6](#)
- ◆ ["Creating a Chat Box" on page 11](#)
- ◆ ["Creating a Chat Link" on page 13](#)
- ◆ ["Creating a Voice Button" on page 15](#)
- ◆ ["Creating a Voice Link" on page 15](#)

## Creating a Chat Button

A Chat Button is an image embedded in your website which a visitor clicks in order to request a chat. The button image can be set to change to reflect the online status of your agents.



Figure 1-2: *Chat Button*



**To create a Chat Button:**

- From the Admin Console menu, select **Visitor Experience > Chat > Buttons** (tab). The Chat Button Library is displayed, showing each of the Chat Button Types and the buttons contained within each section. Each button contains a unique ID which can be referred to for easy reference. On this page you are able to set as the default, enable/disable the button, obtain the code for the button or delete it.

**Notes:**

- If you change a button from Enabled to Disabled, the default button will be used instead. The button will remain in the library for future use.
- If you delete a button, the button will be permanently deleted from the library and the default button will be used instead.

The screenshot shows the 'Buttons' tab in the Admin Console. It features three distinct sections, each with a 'New' button and a table of items:

- CHAT BUTTON LIBRARY:** Contains 3 items. 'Standard Button 1' is the default (green checkmark). 'Example Sticky BR' and 'Example Simple' are disabled (green circles).
- CHAT BOX LIBRARY:** Contains 3 items. 'Example Chat Box 1' is the default (green checkmark). 'Example Sticky Chat Box' and 'Example Chat Box 2' are disabled (green circles).
- CHAT LINK LIBRARY:** Contains 1 item. 'Chat Text Link 1' is the default (green checkmark).

CHAT BUTTON LIBRARY						
Name	ID	Description	Button Code	Enabled/Disabled	Default	Delete
Standard Button 1	1	Static Chat Button with agent image	<a href="#">Get Code</a>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Example Sticky BR	2	Sticky button hovers at bottom right corner of window	<a href="#">Get Code</a>	<input type="checkbox"/>	<a href="#">Set Default</a>	
Example Simple	3	Small Simple Button. No agent image	<a href="#">Get Code</a>	<input type="checkbox"/>	<a href="#">Set Default</a>	
						<b>Total: 3</b>

CHAT BOX LIBRARY						
Name	ID	Description	Button Code	Enabled/Disabled	Default	Delete
Example Chat Box 1	4	Chat Box Example in Blue	<a href="#">Get Code</a>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Example Sticky Chat Box	5	Sticky Chat Box on bottom left corner	<a href="#">Get Code</a>	<input type="checkbox"/>	<a href="#">Set Default</a>	
Example Chat Box 2	6	Chat Box Example in Grey	<a href="#">Get Code</a>	<input type="checkbox"/>	<a href="#">Set Default</a>	
						<b>Total: 3</b>

CHAT LINK LIBRARY						
Name	ID	Description	Button Code	Enabled/Disabled	Default	Delete
Chat Text Link 1	7	Example Chat Text Link Button	<a href="#">Get Code</a>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
						<b>Total: 1</b>

Figure 1-3: Chat Button Library

- Click the **New Chat Button** button. The Add/Edit button screen is displayed, showing the Button Options tab.

ADD/EDIT BUTTON

Button Options

Advanced Options

**Button Settings**

**Name:\***

**Description:**

**Button Position**

Setting the position other than 'Display where embedded' will cause the button to ignore its embedded position on your page and maintain a fixed position relative to the visitor's window, even when scrolling.

**Button position:\***

**Button Design**

**Graphic Source:**

**Select a Button Language:**

**Select a Button Category:**

Shape 1

Shape 2

Shape 3

Right Corner Shape

Left Corner Shape

Status	Description	<input checked="" type="radio"/> Blue	<input type="radio"/> Orange	<input type="radio"/> Green
Online	Operators available			
Offline	No Operators available			
Occupied	Operators away / Back in 5 minutes			

**Mouseover Text Settings**

**Mouseover text - Operator Online:**

**Mouseover text - Operator Occupied:**

**Mouseover text - Operator Offline:**

**Preview Chat Button**

Our **live chat** representatives are available to assist you **Mon-Fri 9am-5pm EST.**

Click to chat wherever you see this chat button!



Live Chat by LivePerson

Figure 1-4: Add/Edit Chat Button - Button Options Tab

- 4 Enter the Name of the Chat Button.
- 5 Enter a Description that describes the Chat Button.
- 6 Select the Button Position. This is relevant for when the visitor is scrolling on a web page. The following options are available:
  - ❖ **Embedded:** The button will appear wherever it is embedded.
  - ❖ **Sticky:** The button will float in a fixed position relative to the visitors screen while they are scrolling.

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**Note:** *Setting the position other than to "Display where embedded" will cause the button to ignore its embedded position on your page and maintain a fixed position relative to the visitor's window, even when scrolling.*

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- 7 In the Button Design area, select whether the Graphic Source is from the LivePerson Gallery or a custom button.
  - Gallery:** When using the gallery you have the following options: the language, the button category, the type of shape and the button color.
  - Custom:** Enter the URL of the folder for the customized images that you would like to use. The URL must begin with "http://" or "https://" (if used on secured pages) and should not end with "/". The folder must contain 3 images with the following names: reponline.gif, repoffline.gif and repoccupied.gifFor more information on customizing graphics for buttons, refer to the following link:  
<http://solutions.liveperson.com/help/permalink.asp?ID=20>.

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**Note:** *For some Button Types English is the only available language option.*

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- 8 Enter text that is displayed when you place your cursor over the button to indicate that an agent is online, occupied or offline.
- 9 Preview the Chat Button which you have generated.

At this point you can either select one of the button options (Save To Library, Clear All Changes. You can Get Code once the changes are saved). Alternatively you can continue to the Advanced Options tab, as explained below.



10 Click the **Advanced Options** tab. The following page is displayed.

Visitor Experience > Chat

Window Editor Surveys Buttons Invitations Dynamic Buttons Tutorial ?

View Button Library

### ADD/EDIT BUTTON

Button Options **Advanced Options**

#### Add accompanying text to Chat Button

We recommend that you add a text message next to the button to explain Live Chat to your customers

Add accompanying text to Chat Button

Our live chat representatives are available to assist you  
**Mon-Fri 9am-5pm EST.**  
*Click to chat wherever you see this chat button!*

Text Position (in relation to button):  Left  Right  Top  Bottom

#### Routing Options

Have chats related to this button routed to a specific skill:

**Warning!** If you select a Skill from this drop down box, the "Click to Chat" button will be active/online ONLY when this Skill is online as well.

Sales

Have chats related to this button routed to a specific agent:

**Warning!** If you select an Agent from this drop down box, the "Click to Chat" button will be active/online ONLY when this agent is online as well.

--- Select Agent ---

#### Smart Availability

The following settings control the type of button image displayed to visitors based on agent availability.

If all agents are "Offline", the Offline image is displayed.  
If all agents are set to "Back in 5 minutes", the "Back in 5 minutes" image is displayed.  
If one of the agents is "Online", Smart availability controls when the Online image is displayed:

Always

Only if visitor can interact immediately  
Agents have free capacity. If they do not, the image changes to "Back in 5 minutes", and visitors are directed to the Offline survey.

Only if visitor can interact within  seconds.  
This option works well for sites with more than 5 visitor interactions/hour and is based on statistical analysis of past wait time.  
If the wait time is exceeded, the image changes to "Back in 5 minutes", and visitors are directed to the offline survey.

#### Add Tracking Variables

[Click here](#) to learn about Tracking Variables

New Tracking Variable

#### Preview Chat Button

Our live chat representatives are available to assist you  
**Mon-Fri 9am-5pm EST.**  
*Click to chat wherever you see this chat button!*

**LIVE HELP**  
I'm Online  
Start Chat >>

Live Chat by LivePerson

Save To Library Clear All Changes

Figure 1-5: Add/Edit Chat Button - Advanced Options Tab

- 11 Check the **Add accompanying text to Chat Button** check box to display the text next to your chat button.
- 12 Enter and format the text message that will appear next to your button on your site.
- 13 Select the position of the text relative to the button.
- 14 Set your routing options.

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**Note:** *These routing options take priority over those defined within the Monitor Code, as explained in the section "Adding Routing Options and Tracking Variables within the Monitor Code" on page 17.*

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- 15 For those with the Smart Availability feature enabled, this feature controls the type of button image displayed to visitors based on agent availability. If all agents are "Offline", the Offline image is displayed. If all agents are set to "Back in 5 minutes", the Back in 5 minutes image is displayed. If one of the agents is "Online", Smart Availability controls when the Online image is displayed. Select from one of the following options:
  - ❖ **Always:** The Online image is always displayed.
  - ❖ **Only if visitor can interact immediately:** Agents have free capacity to interact with visitors. If they do not, the image changes to Back in 5 minutes, and visitors are directed to the Offline survey.
  - ❖ **Only if visitor can interact within x seconds:** This option works well for sites with more than 5 visitor interactions/hour and is based on statistical analysis of past wait time. If the wait time is exceeded, the image changes to Back in 5 minutes, and visitors are directed to the Offline survey.
- 16 Preview the Chat Button which you have generated.
- 17 Select one of the following options:
  - ❖ **Save To Library:** Saves all your changes to the library.
  - ❖ **Clear All Changes:** This option will revert to the last saved button, not to the default.
  - ❖ **Get Code:** This option is only available once you have saved any changes.

## Creating a Chat Box

A Chat Box consists of an image and a chat area embedded on your website where visitors request a chat by entering a question. When offline, the question within the chat box becomes text for an email.





Figure 1-6: Chat Box

In order to create a Chat Box you use the same fields as described in the section above, “Creating a Chat Button” on page 6, for both the **Button Options** tab and the **Advanced Options** tab. The only variation is the Chat Box Text Field, as detailed below.

**To create a Chat Box:**

- 1 From the Admin Console menu, select **Visitor Experience** > **Chat** > **Buttons** (tab). The Chat Button Library is displayed. Showing each of the Chat Button Types and the buttons contained within each section. On this page you are able to set as the default, enable/disable the button, obtain the code for the button or delete it.
- 2 Click the **New Chat Box** button. The Add/Edit Chat Box screen is displayed, showing the Button Options tab.
- 3 Follow all the instructions as detailed in the procedure “To create a Chat Button:” on page 7.
- 4 Complete the additional section which relates to the default text question shown in the Chat Box.

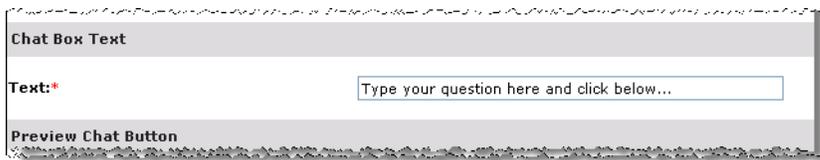


Figure 1-7: Chat Box Text Area in the Button Options Tab

Enter and format the text message that will be displayed in your Chat Box.

- 5 Select one of the following options:
  - ❖ **Save To Library:** Saves all your changes to the library.
  - ❖ **Clear All Changes:** This option will revert to the last saved button, not to the default.
  - ❖ **Get Code:** This option is only available once you have saved any changes.

Alternatively you can continue to the Advanced Options tab.

## Creating a Chat Link

A Chat Link is text that is embedded in your website which a visitor clicks in order to request a chat. This option may be more suitable in situations where there is minimal space, or to include a click-to-chat option within text. In addition the text can change to reflect the agent's availability.

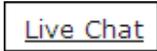


Figure 1-8: *Chat Link*

### To create a Chat Link:

- 1 From the Admin Console menu, select **Visitor Experience** > **Chat** > **Buttons** (tab). The Chat Button Library is displayed. Showing each of the Chat Button Types and the buttons contained within each section. On this page you are able to set as the default, enable/disable the button, obtain the code for the button or delete it.
- 2 Click the **New Chat Link** button. The Add/Edit link screen is displayed, showing the Button Options tab.



**ADD/EDIT LINK**

Button Options
Advanced Options

**Button Settings**

**Name:**\*

**Description:**

**Customize your text**

**Operator Online:**

**Operator Offline:**

**Operator Occupied:**

**Mouseover Text Settings**

**Mouseover text - Operator Online:**

**Mouseover text - Operator Occupied:**

**Mouseover text - Operator Offline:**

**Preview Chat Button**

Live Chat

Save To Library
Clear All Changes
Get Code

Figure 1-9: Add/Edit Chat Link - Button Options Tab

- 3** Enter the Name of the Chat Link.
- 4** Enter a Description that describes the Chat Link.
- 5** Customize the Chat Link text that is displayed when the agent is: online, offline and occupied.
- 6** Enter text that is displayed when you place your cursor over the button to indicate the an agent is online, occupied or offline.
- 7** Preview the Chat Link you have generated.

8 Select one of the following options:

- ❖ **Save To Library:** Saves all your changes to the library.
- ❖ **Clear All Changes:** This option will revert to the last saved button, not to the default.
- ❖ **Get Code:** This option is only available once you have saved any changes.

Alternatively you can continue to the Advanced Options tab.

## Creating a Voice Button

A Voice Button is an image embedded in your website which a visitor clicks in order to request a call. The button image can be set to change to reflect the online status of your agents.



Figure 1-10: Voice Button

To create a Voice Button, from the Admin Console, select:

**Visitor Experience** > **Voice** > **Buttons** (tab). The Voice Button Library is displayed listing each of the Voice Button Types and the buttons contained within each section. On this page you are able to set as the default, enable/disable the button, obtain the code for the button or delete it.

Follow the same process as described in the section [“Creating a Chat Button”](#) on page 6, for both the **Button Options** tab and the **Advanced Options** tab.

## Creating a Voice Link

A Voice Link is text that is embedded in your website which a visitor clicks in order to request a call. This option may be more suitable in situations where there is minimal space, or to include a Click-to-Talk option within text.

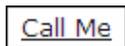


Figure 1-11: Voice Link

In order to create a Voice Link, from the Admin Console, select:

**Visitor Experience** > **Voice** > **Buttons** (tab). The Voice Button Library is displayed listing each of the Voice Button Types and the buttons contained within each section. On this page you are able to set as the default, enable/disable the button, obtain the code for the button or delete it.

Follow the same processes as described in the section [“Creating a Chat Button”](#) on page 6, for both the **Button Options** tab and the **Advanced Options** tab.



## Obtaining Button Code

Once you have created or modified a button, click the **Save to Library** button. This will save your changes and automatically implement these changes on your web pages.

**Note:** *If the button has been edited, any changes will be automatically implemented on all web pages where the button has been deployed.*

You can retrieve the button code, either through the:

- ◆ Custom Button Library
- ◆ Page Code Builder

### To obtain code from the Custom Button Library

- 1 In the Button Library, click the **Get Code** button. The Button Tag screen is displayed.



Figure 1-12: Button Tag Code

- 2 Either copy the displayed code or click the **Copy HTML Code** button.
- 3 Paste the code on the relevant web pages.

### To obtain code from the Page Code Builder

- 1 Choose the Button Type.
- 2 Choose the Button Set.
- 3 Either copy the displayed code or click the **Copy HTML Code** button.
- 4 Paste the code on the relevant web pages.

## Adding Routing Options and Tracking Variables within the Monitor Code

In the Add Routing Options window you are able to route interactions to a specific skill or agent and add tracking variables.

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**Note:** Custom variables created in the Monitor Code are not saved in the library.

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### To set routing options and tracking variables:

- 1 In the Monitor Code area, click the **Advanced** button, the Add Routing Options window is displayed.

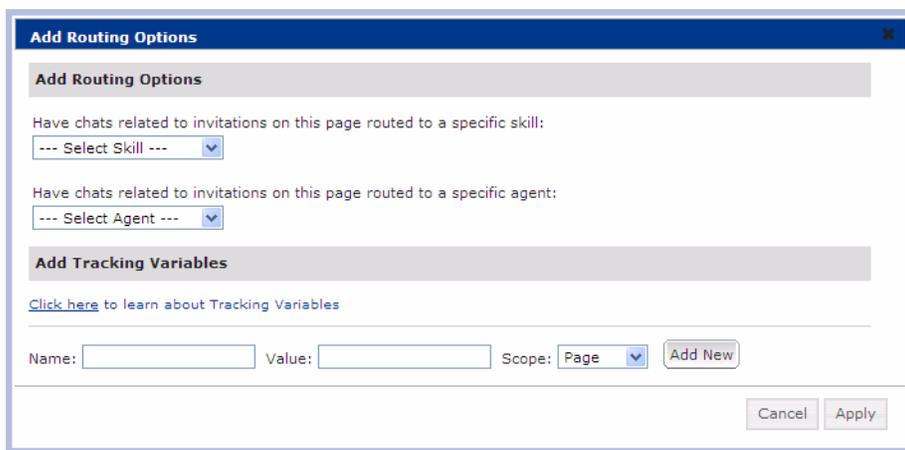


Figure 1-13: Add Routing Options

- 2 In the Add Routing Options area, you can route chats, calls or invitations related to the selected button to a specific skill or agent. The button will be online only when this skill or agent is online.

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**Note:** Button routing set by the Monitor Code will be overwritten if either the button or a Pre-Chat survey contains routing.

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- 3 In the Add Tracking Variables area, define a tracking variable including the name, value and scope of the variable. The following scope options are available:
  - ❖ **Page:** One value is stored per page and expires at the end of the page.
  - ❖ **Session:** Multiple values are stored per session but only one value is stored per specific page in navigation flow.
  - ❖ **Visitor:** One value is stored per unique visitor but remains "visible" in all future sessions by the same visitor.



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**Note:** If the Monitor Code variable specifies a specific skill or agent, it will only affect the button or invitation for that page. If the button specifies a different skill or agent, that will take priority.

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**4** Click the **Add New** button.

With Tracking Variables, you can pass important, business-specific data from pages to the Agent Console, that will help your online agents in selling and servicing your customers. For more information on tracking variables, refer to: <http://solutions.liveperson.com/help/permalink.asp?ID=5>.

**5** Click the **Apply** button to save the changes.

## Related Documents

- ◆ Invitations - Data Sheet

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