IntelliResponse Integration

Data Sheet

LIVEPERSON

Introduction

IntelliResponse provides a service that returns the most suitable answers, from a knowledgebase, to proposed questions. This document details how to use IntelliResponse when integrated with the LivePerson Agent Console. This integration enables agents to easily retrieve recommended responses to specified questions. For further details on IntelliResponse (www.intelliresponse.com).

Note: *The visitor is unable to see any correspondence the agent has with the IntelliResponse functionality.*

The integration allows agents to request an answer either prompted from a visitor's question or generated by the agents themselves, and can then be used within the chat window. If the agent chooses to use the response, they can use it as-is or edit it before sending to the visitor. IntelliResponse capabilities can also be used with the ticket and voice channels, where an agent can enter free text and submit the question to IntelliResponse in order to look up a response. The agent uses this retrieved information by either copying it into an email or relaying it during a call.

Note: *To set up the IntelliResponse knowledgebase you need to correspond with Intelliresponse directly.*

The IntelliResponse answers are not saved each time a visitor returns to your website. However if any of the information garnered from IntelliResponse was used during a chat, that information is recorded in the chat history.

Creating an IntelliResponse Question

A chat that includes the IntelliResponse feature operates in the same way as a regular chat. The IntelliResponse feature has no effect on the visitor side of the chat and so there is no difference to the chat window, as shown below.
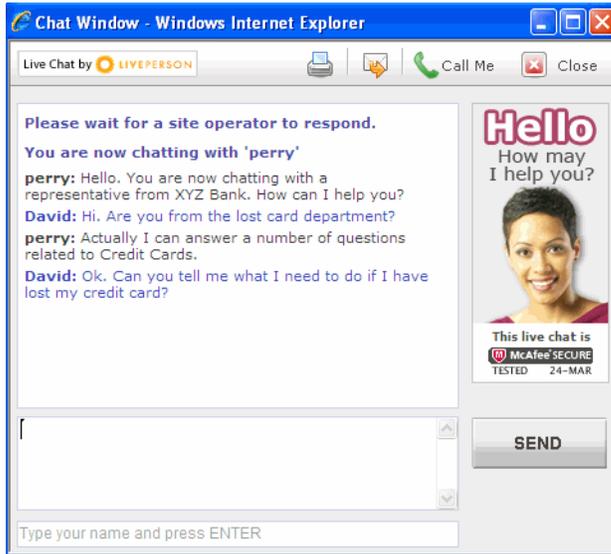
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Figure 1-1: *A Regular Chat in the Visitor's Window*

The only difference in an agent's chat window is the IntelliResponse icon, ⊙ which is displayed on each of the visitor's lines, as shown below.
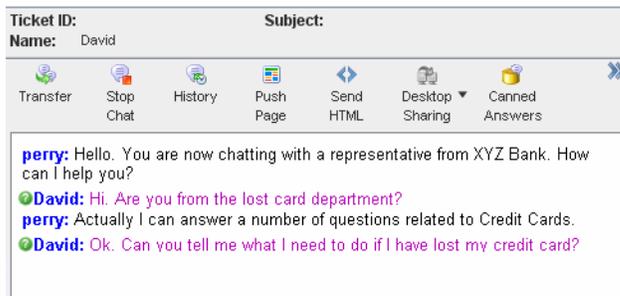

Figure 1-2: *Agent's Chat Window with IntelliResponse Icons*

At any point during a chat the agent can send a question to IntelliResponse. This is achieved by entering the question in the appropriate fields contained within the IntelliResponse tab in the Item Viewer. The tab is explained in more detail in the section "IntelliResponse Tab" on page 5.

An agent can send a question to the IntelliResponse tab in the following ways:

✦ Selecting highlighted text (Right-click option)
✦ Sending the whole visitor line (Icon option)
✦ Manually entering text (Free Text option)

If an applicable answer is found to a question, it is displayed in the IntelliResponse tab. If an answer cannot be found the following text is displayed: "IntelliResponse did not find an exact

response. Try re-phrasing your question or looking in the Related or Suggested Responses".
For a more detailed explanation, see the section "Non-Matched Questions" on page 11.

Right-Click Option

This option can be used when an agent wants to select a specific text taken from the chat with a visitor.

☞ **To use the right-click option**

1   Highlight the required text from the agent's chat window. This can be text from the visitor or the agent.

2   Right-click to display the following menu:

Figure 1-3: *Right-click Menu*

3   Select **Ask**.

Icon Option

Use this option in order to send the whole of a selected visitor line to the Question field in the IntelliResponse tab.

☞ **To use the icon option**

✦   Click on the IntelliResponse icon, 🌐 , located next to the required visitor line.

Free Text Option

The agent has the option to manually enter text into the Question field of the IntelliResponse area. This allows an agent to ask a specific question and is not restricted by the text generated during the chat.

Note: *In addition to asking questions during chats, an agent can use this option when voice and ticket channels.*

☞ **To use the free text option**

1   Enter a question in the Question field of the IntelliResponse tab.

2   Click **Ask**.

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IntelliResponse Tab

The IntelliResponse tab is the work area for asking your questions to IntelliResponse, and for viewing the answers displayed.

As mentioned above, there are three methods to ask a question, after which you select the Context (if you do not want to use the default Context). The Context is the category to which your question relates, for example, sales or support. Review the question and proposed answer displayed. If the answer you have received is not exactly what you are looking for, you can select one of the options from the Related or Suggested drop-down menus. Once you have decided to use one of the answers you can then either send the answer, as it is displayed, directly to the visitor, or you can edit the answer in the agent's chat window and send it via the chat.

The figure below shows the relationship between highlighted information in the Agent's chat window and the IntelliResponse tab.
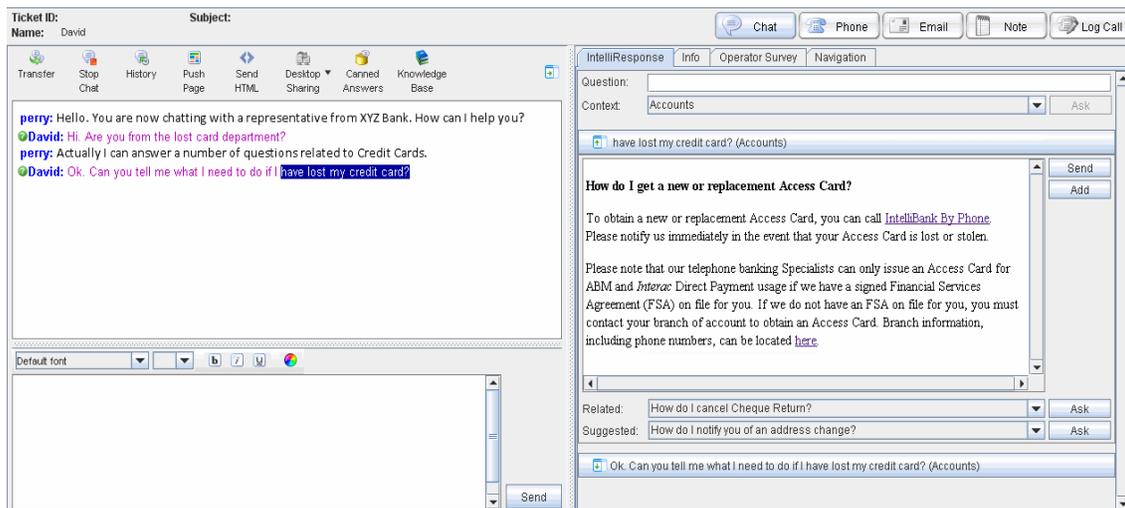

Figure 1-4: *The Relationship between Agent Chat Window and IntelliResponse Tab*

Question Field

The Question field is the area where you manually enter your questions. This enables agents to ask a specific question and is not restricted by the text generated during the chat.

Context Selector

The context selector displays the context used to answer a question. It is important to specify the context of the question in order to get the appropriate response, as answers may vary according to the context selected. All contexts and their contents are defined between the

customer and IntelliResponse, however the default context is defined in the Admin Console. The default context is used by IntelliResponse for the initial search, although an agent is able to select other contexts (if they exist) from a list of available contexts. For example, a banking account may have the following type of contexts: mortgage, credit cards and saving accounts, and the default will be one of these defined contexts.

Note: *All contexts and their definitions are defined between the customer and IntelliResponse.*

There are two places in the Admin Console where you can define the default context: the Page Code Builder and the Rules Engine. The outcome is the same but the method varies by either tracking the variables (as in the Page Code Builder), or creating a custom variable through rules. Using the rules options allows for a more specified definition of when the default context should be used.

There is no prioritization of the custom variable whether it is created in the Page Code Builder or the Rules Engine. So, for example, the value of the custom variable will be dependant when a button was clicked compared with when a rule was set to be fired.

Context Selector via the Rules Engine

☞ **To define a default context through the Rules Engine:**

1   In the Admin Console go to **Rules** > **Visitor Rules** > **Rules Type** (tab).

2   Click an existing Rule Type, for example, When visitor enters page.

3   Click the **New Rule** button.

4   Enter an appropriate Name and Description.

5   Ensure the status is enabled.

6   Add a condition, if required.

7   Click the **Add Action** link, to display the following:

Then perform these actions:

Add Action

Choose Type: Variables

Action: Set Custom Variable

| Variable Name | IRContext |
| Variable Value | visa |

hint -
Add a custom variable to the session.
In visitor contexts, you can use macros to set the variable name and value.
E.g., $!{vars.varname}

✔   ✗

Figure 1-5: *Adding IRContext Custom Variable as a Rule*

8 Choose type Variables.

9 Select the action Set Custom Variable

10 Enter the variable name as IRContext, to specify the custom variable that specifically relates to IntelliResponse.

Note: *This field is case sensitive, so ensure that IRContext is entered.*

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11 Enter the variable value, which is the name of the default context, for example, "visa".

Note: *You also have the option to select the actions: Set Custom Variable in scope and Set Custom Variable in scope - One Time Only where you enter the variable name, IRContext and the default context value. In addition, you can select a scope to which the custom variable applies.*

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12 Click the **Update All** button.

13 Click the **Submit All Changes** button.

Context Selector via Page Code Builder

Note: *For information on the Page Code Builder and button libraries, refer to the Custom Button Library data sheet.*

The other way to define a default context is through the Page Code Builder. You are able to add a default context through both the Button Code and the Monitor Code.

✦ **Button Code:** Adds the IRContext tracking variable definition to the button created on the Page Code Builder. A context can be defined for each button, even when there are multiple buttons on a single page.

✦ **Monitor Code:** Adds the IRContext tracking variable definition to the Monitor Code so that the definition applies to the whole page.

You may decide to use this option if you have three buttons on a page and you want them all to have the same default context. Alternatively for an invitation to contain the default context you need to select this option (as the Button code does not apply to an invitation).

☞ **To define a default context in the Button Code:**

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

2 Select a Button Type, by choosing one of the tabs.

3 From the drop-down menu select the button that you want to add the tracking variable.

4 Click the **Edit Button**.

5 Click the **Advanced Options** tab.

6 In the Add Tracking Variables area, click the **New Tracking Variable** button. The following window is displayed.
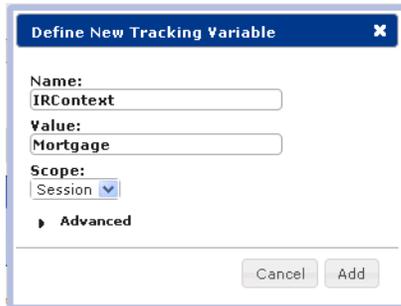

Figure 1-6: *New Tracking Variable*

7 Define the following fields:
- ❖ **Name:** Enter "IRContext" to specify the tracking variable that specifically relates to IntelliResponse.

Note: *The Name field is case sensitive, so ensure that IRContext is entered.*

- ❖ **Value:** Enter the name of the default context.
- ❖ Select Session Scope.

8 Click the **ADD** button to add these variables to the selected button.

9 Click the **Save to Library** button. A confirmation window is displayed.

10 Click the **Save to Library** button to deploy the changes to the selected buttons.

☞ **To define a default context in the Monitor Code**

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

2 In the Monitor Code section, click the **Advanced** button. The following window is displayed.

Figure 1-7: *Add Routing Options*

3   In the Add Tracking Variables area, define the following fields:

   ❖ **Name:** Enter "IRContext" to specify the tracking variable that specifically relates to IntelliResponse.

Note: *The Name field is case sensitive, so ensure that IRContext is entered.*

   ❖ **Value:** Enter the name of the default context.

   ❖ Select Session Scope.

4   Click **Apply**. The Tracking Variable is added to the Monitor Code.

Figure 1-8: *Tracking Variable within the Monitor Code*

5   Copy and paste the Monitor Code at the very bottom of your web pages just before the `</body>` tag.

Notes:

   i.   *Make sure to paste the Monitor Code as is, without modifying it.*

   ii. *In order that the default context applies to all pages of your website, paste the Monitor Code in all the pages.*

As mentioned above, you can change the default context to any other available context. When questions are sent to IntelliResponse, only the currently selected context is used. Changing the context has no effect on questions that were already sent to IntelliResponse, and may provide you with an alternative answer.

Utilizing Answers

You can ask any number of questions during a session. Each question that is sent to IntelliResponse is recorded, with its context, and displayed to the agent. Click on the question header to either open or collapse the information. In the example below, the answer that relates to the question "What is the interest rate", with a context of "Accounts" is displayed.
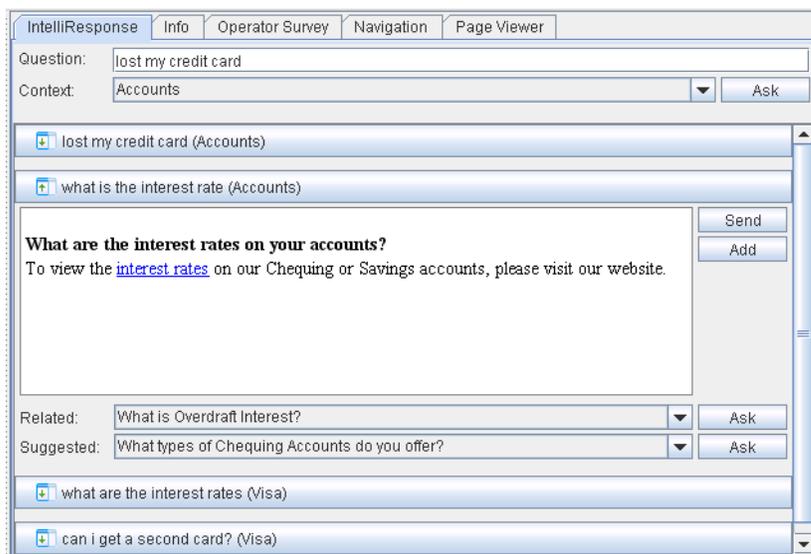
Figure 1-9: *IntelliResponse Questions and Answers*

The questions are displayed from the most recent at the top. If you decide to use the information given in the answer, the following options are available:

✦ **Send Button:** Sends all the text that is displayed in the answer box directly to the visitor. The information is also automatically displayed in the agent's chat area.

✦ **Add Button:** Adds all the text that is displayed in the answer box into the agent's chat window, which the agent can then edit.

Note: *Only the text displayed in the answer is sent to the visitor, the question is not displayed.*

If the answer displayed is not exactly what you are looking for, there is an option to select a question from the **Related** or **Suggested** menus. Select one of the listed questions from the drop-down menus, and click the **Ask** button to display the answer.

Non-Matched Questions

If an answer cannot be found the following message is displayed "IntelliResponse did not find an exact response. Try re-phrasing your question or looking in the Related or Suggested Responses".
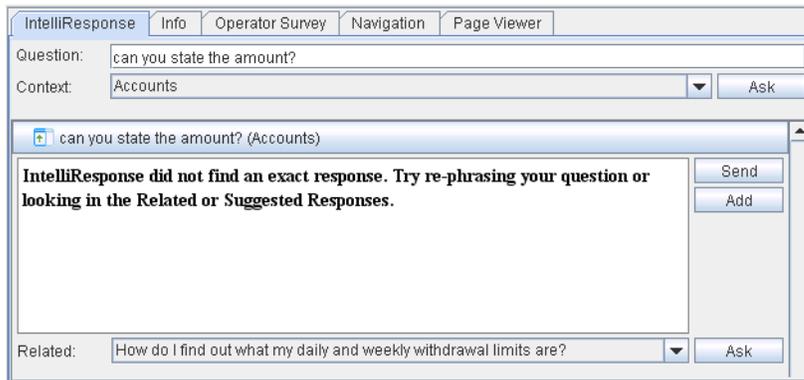

Figure 1-10: *Not Found Answer in IntelliResponse*

As suggested, you can either rephrase your question. Alternatively you can select an option from the **Related** menu. Select one of the listed questions from the drop-down menus, and click on the **Ask** button to display the answer.

Related Documents

✦ Data Sheet: Custom Button Library