

Comparison Guide – LivePerson Agent Console

Document Version: 1.0

March 21, 2013

Data Sheet



LIVEPERSON

Introduction

The LivePerson Agent Console (from now on referred to as Agent Console), is started directly from a web browser, and can run on both Windows and Mac operating systems. By using the Agent Console you will not only have convenient access to LivePerson from almost any computer, without having to involve your IT department to install an application, but you can also always automatically launch the most current version of the Agent Console each time you login.

This document is divided into the following sections:

- ◆ New features contained within the Agent Console. See [below](#).
- ◆ Changes in the: menu items, toolbars and shortcut keys, between the new Agent Console and following Desktop-Installed consoles used in earlier versions:
 - ❖ Windows Desktop Installed Operator Console – This is the Microsoft Windows platform which requires a desktop installation. The last version of this console was version 8.4. See [“Windows Agent Console” on page 5](#).
 - ❖ Mac Operator Console – This platform requires a Java runtime environment and is certified for operation on Apple’s Mac OS. The last version of this console was version 2.6. See [“Mac Agent Console” on page 16](#).

Note: *Installation of the Agent Console does not affect the layout and operation of the Admin Console.*

New Features in the Agent Console

Improved Look and Feel

The new LivePerson Agent Console has a much more crisp look, enabling the agent to navigate through the various channels with ease. It includes: the ability to toggle between the general Workspace and the ticketing interface; an inlinespell checker for e-mails and notes; and the ability to keep multiple chat windows open at the same time.

For an interactive tour of the agent console [click here](#).



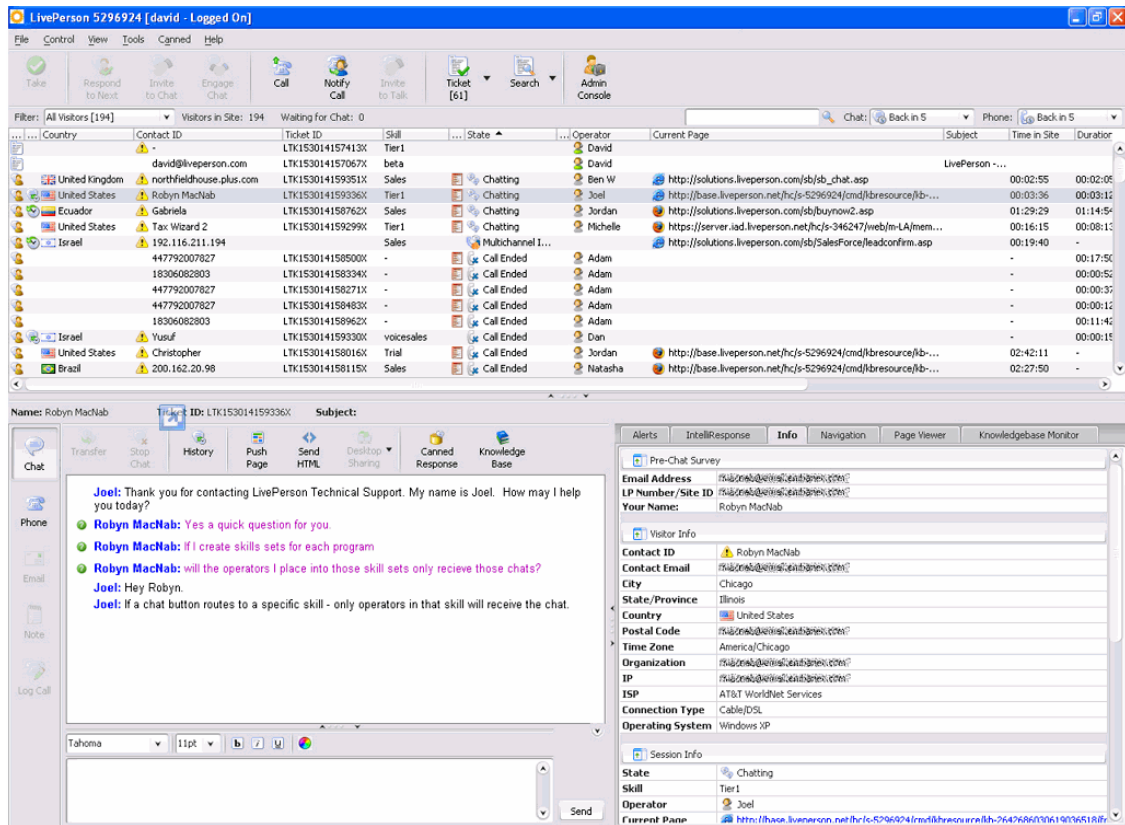


Figure 1-1: *The New Look LivePerson Agent Console*

Multi Window

Multi visitor window mode enables agents to simultaneously view chats with different visitors. The following options are available:

- ✦ **Single:** This option keeps the Agent Console as a single unit. Click on a visitor in the Visitor List to display the chat and visitor information for the selected visitor.
- ✦ **Multi:** This option divides the Agent Console into a Visitor List and individual visitor windows, for each selected visitor. A separate visitor window can be opened for any number of visitors.

Desktop Sharing

The Desktop Sharing option lets you provide an even higher level of support, both on and off your website pages. With Desktop Sharing, your agents can request to view or share the desktop session of a visitor, and provide hands-on assistance from your web site to applications running on your customer's computer, not just on the tagged pages of your website.

- ✦ **Privacy** – Requires the acceptance of the visitor to start a session, and also to move from the view mode to the interactive mode.
- ✦ **Security** – Secure encrypted communication.
- ✦ **Software** – The only thing the visitor requires is a Java Plug-in.

Intelliresponse

IntelliResponse (<http://www.intelliresponse.com/>) provides a service that returns the most suitable answers to proposed questions. The Data Sheet details how to use IntelliResponse when integrated with the LivePerson Agent Console. This integration enables agents to easily retrieve recommended responses to specified questions.

Note: *In order to have the feature set up, you need to correspond with Intelliresponse directly.*

Full HTML Email/Chat Editor

LivePerson's Agent Console contains a robust HTML editing capabilities and improved HTML rendering, enabling Word-like HTML authoring capabilities.

Built-In Diagnostic Tool

The Diagnostic Tool enables customers to report issues or problems they are experiencing with the LivePerson Agent Console. The tool increases LivePerson's ability to identify and resolve customer issues. When reporting an issue, (for example: system errors, disconnections, application freezes or user interface irregularities) relevant system information and log files are attached, enabling LivePerson Technical Support to resolve issues faster and improve customer satisfaction.



Windows Agent Console

Menu Items

The table below lists all the menu items that appear in the Agent Console, and compares them to the menus that existed in the Windows Operator Console.

Note: *The LivePerson platform is composed of several solutions, tightly integrated together. The available menu items depend on the particular solution modules you have purchased.*

Agent Console	Previous Windows Operator Console Version	Comments
File	File	No change
Log On	Login	New Name
Log Off	Logout	New Name
Change State	–	New menu item
Preferences	Settings	Name change Content change (Defines Agent Console layout, proxy connection settings, sounds, colors, formatting and spell checker.
User Information	'Information' in Tools menu	New location
Exit	Exit	No Change
Control	Control	No change
Take Next Chat/Call	Accept Next Chat	New name
Take Chat/Call	Accept Chat	New name
Respond to Next Chat/Call	Next Response	New name
Invite to Chat	Invite	New name
Engage Chat	Engage	New name
Invite to Talk	Invite to Talk	No change
Call	Phone	New name



Agent Console	Previous Windows Operator Console Version	Comments
Push Page	'Push Page' under Chat Actions options	New location
Chat Actions	-	New menu item
Transfer Chat	Transfer Chat	No change
Stop Chat	Stop Chat	No change
Send HTML	Send HTML	No change
Send Private Message	Send Private Message	No change
Call Actions	-	New menu item
Transfer Call	Transfer Call	No change
Attach Call	Attach Call	No change
Notify Call	Notify Call	No change
Accept Callback Request	-	New menu item
Refuse Callback Request	-	New menu item
Hold Call (toggles to Resume Call)	Hold Call	No change
Hang Up	Hang Up	No change
Ticket Actions	-	New menu item
Take Next Ticket	Take Next Ticket	No change
My Next Ticket	-	New menu item
Assign Ticket	Attach to Ticket	New name
New Ticket	Was under "Control" only for Ticketing	New location (Lists available skills for agent)
Send / Add Note / Add Log	Was under "Control" only for Ticketing	New location (Changes according tab selected)
Trash ticket	-	New menu item
Transfer/Reassign Ticket	-	New menu item
Delete Draft Ticket	-	New menu item



Agent Console	Previous Windows Operator Console Version	Comments
Send / Add Note / Add Log	-	New menu item Changes according to tab selected
Add Attachment	Was under "Control" only for Ticketing	No change
From My Computer	Was under "Control" only for Ticketing	No change
From This Ticket	Was under "Control" only for Ticketing	No change
Desktop Sharing	-	New menu item
Start/Stop Desktop Sharing	-	New menu item
Switch to Interactive Mode	-	New menu item
Chat History	Chat History	No change
All Sessions History	All Sessions History	No change
Capture Visitor	Capture Visitor	No change
Delete Captured Visitor	Delete Captured Visitor	No change
Block Visitor	Block for Chat	New name
View	View	No change
Toolbars	Toolbars	No change
Search	Search	No change
Sort	Sort	No change
Customize Columns	Customize Columns	No change
View Tickets	Show/Hide Tickets	Name change
Refresh Captured Visitor List	Refresh Captured Visitor List	No change
Refresh	-	New menu item
Filter	Filter	No change

Agent Console	Previous Windows Operator Console Version	Comments
Tools	Tools	No change
Dashboard	'Dashboard' under LivePerson menu	New location
Operator Snapshot	'Operator Snapshot' under LivePerson menu	New location
Admin Console	'Open Admin Console' under LivePerson menu	New location
Chat Transcripts	'Chat Transcripts' under LivePerson menu	New name New location
Suggest Content	'Suggest Content' under Control menu	New location
Internal Knowledgebase	'Knowledgebase' under LivePerson menu	New name New location
Billing	'Sign Up' under LivePerson menu	New name New location
Canned	Canned	No change
Modify	Modify	No change
Chat Canned Responses	–	New menu item
Email Canned Letters	–	New menu item
Pop Up	Pop Up	No change
{List of canned Answers/Letters}	{List of canned Answers/Letters}	No change
Window (for Multi-Visitor Window mode)	–	New menu item
Open Window	–	New menu item
Arrange	–	New menu item
Cascade	–	New menu item
Tile	–	New menu item

Agent Console	Previous Windows Operator Console Version	Comments
LivePerson	-	New menu item
{List of Window Names}	-	New menu item



Agent Console	Previous Windows Operator Console Version	Comments
Help	Help	No change
Help Topics	Help Topics	No change
Getting Started and Training	Getting Started and Training	No change
Customer Center	Customer Center	No change
Report an Issue	Report Error	No change
About	About	No change

Menu Bar Exceptions on Windows Operator Console

The Modify Canned Answers functionality that exists in the Windows Operator console does not exist in Agent Console. Instead administrators can modify canned answers from the Admin Console, as described below:

To define canned responses:

- ◆ In the Agent Console click **Canned > Modify > Chat Canned Responses**

or

Click **Canned > Modify > Email Canned Responses**

- ❖ If the account is set up to allow automatic login from the Agent Console to the Admin Console, then the system will automatically log the user into the Admin Console.

Depending on the initial selection made, the system will present the user with the Canned tab either under:

- **Content Management > Chat > Canned Responses** (tab).

or

- **Content Management > Chat > Canned Letters** (tab).

- ❖ If the account is NOT set up to allow automatic login from the Agent Console to the Admin Console, then the system will present the Admin login screen in a new browser window.

After a successful login and depending on the initial selection made, the system will present the user with the Canned tab either under:

- **Content Management > Chat > Canned Responses** (tab).

or

- **Content Management > Chat > Canned Letters** (tab).

Toolbars

Use the LivePerson toolbars for quick access to commonly used functionality. The LivePerson Agent Console includes the following toolbars:




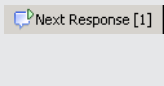









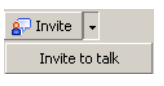

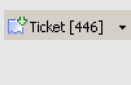



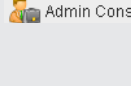
- ◆ **Main Toolbar:** Functions for managing the Visitor queue
- ◆ **Chat Toolbar:** Functions for managing the current chat session
- ◆ **Chat Format Toolbar:** Tools for formatting Chat text

Note: *Itemized toolbars are also displayed when selecting the Channel buttons: Phone, Email, Note and Log Call. The toolbars and buttons are not listed in the document as only the appearance of the icons differ and there is no additional functionality.*



















Main Toolbar

Use the Main Toolbar buttons to manage the visitor queue.

Agent Console Button	Previous Windows Operator Console Button	New/Replaced	Description
		Replaced	Accept the next chat request waiting in the visitor queue.
		Replaced	Switch to the next visitor in a chat session that is waiting for a reply from you
		Replaced	Initiate a chat with a selected visitor in your website
		Replaced	Opens a chat window on the visitor's screen
		Replaced	Make a phone call
		Replaced	Indicates to which visitor the agent is currently speaking. This is used for accounts that use an external phone system instead of the Softphone configuration.
		Replaced	Initiate a call with a selected visitor in your website
		Replaced	Accept next ticket in queue
		Replaced	Toggle between the Search and Workspace modes
		Replaced	Access the LivePerson Admin Console


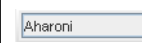










Chat Toolbar

Use the Chat Toolbar buttons to manage the current chat session and to include predefined responses.

Agent Console Button	Previous Windows Operator Console Button	New/Replaced	Description
 Transfer		Replaced	Transfer a chat session to another operator or the administrator
 Stop Chat		Replaced	Terminate the selected chat session
 History		Replaced	Display the chat history of a selected visitor
 Push Page		Replaced	Send a URL of a page to a visitor during a chat session
 Send HTML		Replaced	Send short HTML code to a visitor during a chat session
 Desktop Sharing		New	Begin or end Desktop Sharing session
 Canned Response		Replaced	Send a canned response
 Knowledge Base		Replaced	Shortcut to Knowledgebase, if enabled

Chat Format Toolbar

Use the Chat Format toolbar buttons to change the appearance of text entered in your chat messages.

Agent Console Button	Previous Windows Operator Console Button	New/Replaced	Description
		Replaced	Select the font used in your chat messages
		Replaced	Select the size of the font used in your chat messages
		Replaced	Bold text
		Replaced	Italicize text
		Replaced	Underline text
		Replaced	Change the color of text



Shortcut Keys

The table below is a summary of the shortcut keys for common functions in the Agent Console running on a Windows Operating System.

Note: *The keys used for the shortcuts differ slightly for Agent Console running on Windows and Mac Operating Systems.*

Shortcut Key in Windows Operator Console	Function
F1	Help topics
F2	Accept next chat in queue
F3	Move to next chat awaiting response
F4	Open Canned Response pop-up menu
F5	Refresh Agent window
F8	Open the Agent Snapshot Window (LivePerson Pro accounts and above)
F9	Toggle Search Tickets screen (Contact Center accounts)
<Ctrl> + F10	Initiate voice call (LivePerson Voice accounts)
<Ctrl> + <Shift> +F10	Notify Call (LivePerson Voice accounts)



Mac Agent Console

Menu Items

The main Mac application toolbar which contains the LivePerson menu remains unchanged. This menu contains the About LivePerson and Preferences menu items. The Preference menu defines Agent Console layout, multi visitor window mode, proxy connection settings, sounds, colors, formatting and spell checker.

The table below lists all the menu items that appear in the Agent Console, and compares them to what existed in the Mac Operator Console.

Note: *The LivePerson platform is composed of several solutions, tightly integrated together. The available menu items depend on the particular solution modules you have purchased.*

Agent Console	Previous Mac Operator Console Version	Comments
File	File	No change
Log On	'Login' under Site menu	New location
Log Off	'Logout' under Site menu	New location
Change State	'Change State' under Site menu	New location
User Information	–	New menu item
Exit	'Exit' under Site menu	No Change
Control	–	New menu item
Take Next	'Accept Next' under Visitor menu	New location Applies to chat and calls.
Take	'Accept' under Visitor menu	New location Applies to chat and calls.
Respond to Next	'Next Response' under Visitor menu	New location Applies to chat and calls.
Invite to Chat	–	New menu item
Engage Chat	–	New menu item
Invite to Talk	–	New menu item

Agent Console	Previous Mac Operator Console Version	Comments
Call	–	New menu item
Push Page	'Push Page' under Chat menu	New location
Chat Actions	–	New menu item
Transfer Chat	'Transfer' under Chat menu	New location
Stop Chat	'Terminate' under Visitor menu	New location
Send HTML	'Send HTML' under Chat menu	New location
Send Private Message	'Private Message' under Chat menu	New name New location
Call Actions	–	New menu item
Transfer Call	–	New menu item
Attach Call	–	New menu item
Notify Call	–	New menu item
Accept Callback Request	–	New menu item
Refuse Callback Request	–	New menu item
Hang Up	–	New menu item
Ticketing Actions	–	New menu item
Take Next Ticket	–	New menu item
My Next Ticket	–	New menu item
Assign Ticket	–	New menu item
New Ticket	–	New name Changes according to tab selected
<List of available skills>	–	New menu item
Send / Add Note / Add Log	–	New menu item Changes according to tab selected

Agent Console	Previous Mac Operator Console Version	Comments
Add Attachment	–	New menu item
From My Computer	–	New menu item
From This Ticket	–	New menu item
Trash Ticket	–	New menu item
Transfer/Reassign Ticket	–	New menu item
Delete Draft Ticket	–	New menu item
Desktop Sharing	–	New menu item New Feature (See the Desktop Sharing Data Sheet for more information)
Start/Stop Desktop Sharing	–	New menu item
Switch to Interactive Mode	–	New menu item
Chat History	–	New menu item
All Sessions History	'History' under Visitor menu	No change
Capture Visitor	–	New menu item
Delete Captured Visitor	–	New menu item
Block Visitor	–	New menu item

Agent Console	Previous Mac Operator Console Version	Comments
View	View	No change
Toolbars	–	New menu item
Search	–	New menu item
Sort	Sort	No change
Customize Columns	Customize Columns	No change
View Tickets	–	New menu item
Refresh Captured Visitor List	–	New menu item
Refresh	–	New menu item
Filter	–	New menu item
Tools	–	New menu item
Dashboard	–	New menu item
Operator Snapshot	–	New menu item
Open Admin Console	–	New menu item
View Chat Transcripts	–	New menu item
Suggest Content	"Suggest Content" under Content Management menu	New location
Internal Knowledgebase	–	New menu item
Billing	–	New menu item
Canned	–	New menu item
Modify	–	New menu item
Chat Canned Responses	–	New menu item
Email Canned Responses	–	New menu item
Pop Up	–	New menu item
{List of canned Answers/ Letters}	–	Removed

Agent Console	Previous Mac Operator Console Version	Comments
Window (for Multi-Visitor Window mode)	Window	No change <i>(Note: The icon has been removed)</i>
Open Window	'Open Visitor Window' under Visitor menu	New name New location
Arrange	Arrange	No change
Cascade	Cascade	No change
Tile	Tile	No change
{List of Window Names}	{List of Window Names}	No change
Help	Help	No change
Help Topics	Help	New menu name
Getting Started and Training	–	New menu item
Customer Center	–	New menu item
Report Error	–	New menu item

Menu Bar Omissions on the Mac Operator Console

The following item that appears on the Mac Operator Console menu bar does not appear on the Agent Console menu bar:

- ◆ Refuse Chat (under the Visitor menu)

Toolbars















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

- ◆ **Main Toolbar:** Functions for managing the Visitor queue
- ◆ **Chat Toolbar:** Functions for managing the current chat session
- ◆ **Chat Format Toolbar:** Tools for formatting Chat text

Note: *Itemized toolbars are also displayed when selecting the Channel buttons: Phone, Email, Note and Log Call. The toolbars and buttons are not listed in the document as only the appearance of the icons differ and there is no additional functionality.*

Main Toolbar














Use the Main Toolbar buttons to manage the visitor queue.

Agent Console Icon	Previous Mac Operator Console Button	New/Replaced	Description
		Replaced	Accept the next chat request waiting in the visitor queue. The number in parentheses indicates the number of chats in the queue
		Replaced	Switch to the next visitor in a chat session that is waiting for a reply from you
		Replaced	Initiate a chat with a selected visitor in your website
	–	New	Indicates to which visitor the agent is currently speaking. This is used for accounts that use an external phone system instead of the Softphone configuration.
	–	New	Opens a chat window in the visitor's screen.
	–	New	Make a phone call
	–	New	Indicates to which visitor the operator is currently speaking. This is used for accounts that use an external phone system instead of the Softphone configuration
	–	New	Accept next ticket in queue
	–	New	Toggle between the Search and Workspace modes
		Replaced	Open the visitor or ticket window

Agent Console Icon	Previous Mac Operator Console Button	New/Replaced	Description
 Admin Console		Replaced	Access the LivePerson Admin Console













Chat Toolbar

Use the Chat Toolbar buttons to manage the current chat session and to include predefined responses.

Agent Console Icon	Previous Mac Operator Console Icon	New/Replaced	Description
 Transfer		Replaced	Transfer a chat session to another operator or the administrator
 Stop Chat		Replaced	Terminate the selected chat session
 History		Replaced	Display the chat history of a selected visitor
 Send URL		Replaced	Send a URL of a page to a visitor during a chat session
 Send HTML	–	New	Send short HTML code to a visitor during a chat session
 Desktop Sharing	–	New	Begin or end Desktop Sharing session
 Canned Response		Replaced	Send a canned response
 Knowledge Base	–	New	Shortcut to Knowledgebase

Chat Format Toolbar

Use the Chat Format toolbar buttons to change the appearance of text entered in your chat messages.

Agent Console Icon	Previous Mac Operator Console Icon	New/Replaced	Description
		Replaced	Select the font used in your chat messages
		Replaced	Select the size of the font used in your chat messages
		Replaced	Bold text
		Replaced	Italicize text
		Replaced	Underline text
		Replaced	Change the color of text

Shortcut Keys

The table below is a summary of the shortcut keys for common functions in the Agent Console running on a Mac Operating System.

Note: *The keys used for the shortcuts differ slightly for Agent Console running on Windows and Mac Operating Systems.*

Shortcut Key in Windows Operator Console	Function
<Command> + F1	Help topics
<Command> + F2	Accept next chat in queue
<Command> + F3	Move to next chat awaiting response
<Command> + F4	Open Canned Response pop-up menu
<Command> + F5	Refresh Agent window
<Command> + F8	Open the Agent Snapshot Window (LivePerson Pro accounts and above)
<Command> + F9	Toggle Search Tickets screen (Contact Center accounts)
<Command> + <Alt> +F10	Initiate voice call (LivePerson Voice accounts)
<Command> + <Shift> +F10	Notify Call (LivePerson Voice accounts)





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