WhosOn 2018
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Before using the WhosOn client for the first time, it must be installed. This is done by downloading the installer and running it. Once installed, you can launch the client from a desktop shortcut or the start menu. When opened, the client will continue to run in the system tray. If an update is available, you will be prompted to install it upon launching the client.

The WhosOn client has been optimised for Windows 10. There is a separate installer available for Windows 8 version of Windows. Please note that the modern client is not compatible with any non-Windows operating systems.

For more client download options, visit: www.whoson.com/download
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Important

The WhosOn client connects through its own port. If you have a firewall or proxy in place, you may need to allow outbound connections over port 8011 to the WhosOn server.

Login

The login screen will appear when opening the client. Every user will have their own username and password, as given out by an administrator. All details other than the password are remembered.

On your first login, you will also be asked to enter the WhosOn server and the authentication string. These will be provided by an administrator. Your name is what will appear when chatting with a visitor, and your department is the department that will appear in the transfer list for other agents to see.

Each user will have unique login details. The WhosOn server and authentication string, however, will be the same for all users inside an organization and should match the details on the original setup email from WhosOn.

The WhosOn client connects through its own port. If you have a firewall or proxy in place, you may need to allow outbound connections over port 8011 to the WhosOn server.
WhosOn can be configured to use an internal proxy setting for each client. You do this by selecting the menu icon above the WhosOn server field. These settings allow you to set the WhosOn client to use a particular proxy server to access the WhosOn server. This could be required if you need to access the internet through a proxy server.

Here you manually specify the details of your proxy server. The available types are Tunnel, SOCKS4 and SOCKS5. Please contact your systems administrator for information on configuring these options.
**Setting status**

Your status determines whether you are available to chat. You will only see notifications for new chats when your status is set to Online; not if your status is Busy, Be Right Back or Away. Your status is visible to other agents.

At least one agent must have their status set to Online for the chat to function. Depending on the configuration of your chat, visitors may be given an offline message or simply not see the chat button with no agents online.

Busy, Be Right Back and Away all mean that you are not available for a chat, but there are differences. If a visitor clicks to chat while you are Busy then they may be directed to a queue. If you are set to Away or Be Right Back then they may be displayed a message showing that the chat is offline. The exact behaviour depends on your chat configuration.
Chat window

The chat window is what you will see when chatting with a website visitor. You will see messages sent by both you and the visitor, as well as a preview of what the visitor is currently typing. Messages sent by participants will appear immediately in the chat window.

You will also see server messages here. For example, when the chat is transferred or closed by the visitor. (These messages are not visible to the visitor.)
Closed chats

All chats that were closed for the current date will be listed in this tab, along with specific time stamp. You can save a copy of the chat transcript locally on your computer, or email a copy of the transcript.
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Missed chats

All missed chats will be listed in this window with specific time stamp. When a chat request cannot be answered by an agent, the visitor will be asked to leave their email address and a message. The chat is then recorded as a missed chat.
Team window

All connected operators will be listed in this window. You also have the ability to start a dialog with a selected team member.
Sites

The sites tab displays the current monitored site(s) assigned to the logged in user. This tab can also be opened by using the keyboard shortcut Alt + S. By selecting a monitored site, a summary will be displayed reporting total chats and visitors taken for the day.
Active visitors

The active visitors tab will display visitors that are actively browsing your website. Selecting an active visitor will display the visit record for that selected user.
Previous visits

Previous visits displays a list of previous visit records of your website visitors.
Files

The files option allows each user to upload/download files to and from the server, to be accessible during a chat session.
Settings

The settings tab allows users to create their own personal canned responses to use within chat sessions. These canned responses will be visible only to the user that created them.
Feedback

The feedback tab is for Parker Software. Your feedback is very important to us, so please leave us your opinions on any improvements you would like to see for future releases.

![Feedback interface](image)
Options

The options tab allows you to customise preferences by toggling certain options on and off. These are personal options and do not affect other agents.
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**Keep running in system tray when window closed**
When enabled, and you close the client window, WhosOn will continue running in the background and you will still receive any notifications.

**Show popup notifications**
When enabled, you will see pop-up notifications for important events in WhosOn, even when the client is minimized or running in the system tray.

**Enable spell checking**
When enabled, incorrectly spelled words will be highlighted. Right-clicking will give corrective spelling suggestions.

**Set my status to away on startup**
When enabled, your status will be set to Away upon opening the client, rather than Online.

**Auto away after 5 minutes of inactivity**
When enabled, your status will automatically be changed to Away after a certain period of inactivity on the machine.

**Auto logout after 30 minutes of inactivity**
When enabled, the client will log you out after a certain period of inactivity on the machine.

**Logout when computer locked**
When enabled, the client will log you out whenever the Windows lock screen is used.

**Always show canned responses window**
When enabled, the canned responses window is always shown in the chat, rather than being toggled on and off.

**Show suggestions when typing**
When enabled, suggestions will be shown to you based on your previous responses. You can select a response from suggestions using the tab key.

**Auto monitor all chats**
When enabled, you will automatically monitor all chats in progress for all agents.

**Show all visitors on start**
When the program starts, it will load a list of all the current visitors. When turned off, you will only see visitors from the point that you log in.

**Show only icons on the toolbar**
Removes text labels to show only icons on the side toolbar.

**Show emoji popup when chatting**
Shows the option for entering emoji into the chat.
My canned responses

Any words that WhosOn recognises as a keyword in the conversation will appear in bold. Clicking one of these words will then bring up the canned responses window, suggesting canned responses based on the keywords found. From the canned responses window, you can select other keywords from the conversation, or manually enter your own to search for.
Chat

Under the chat tab you can set default opening and chat transfer messages. Please refer to the example below.

Personal default messages

When setting personal default messages, you can use the following values.
- %NAME% – Visitor name
- %MYNAME% – Operator name
- %MYSMS% – Operator SMS number
- %MYDEPT% – Operator department
- %GREETING% – Operator’s greeting message (taken from the local machine and preset to Good Morning/Good Afternoon/Good Evening depending on the client’s local time)
- %DATE% – Current date
- %TIME% – Current time
- %MYTITLE% – Operator’s title
- %SITENAME% – The domain’s name within WhosOn
- %DOMAIN% – The domain within WhosOn
- %MYEMAIL% – Operator’s email address
- %MYPHONE% – Operator’s phone
Office 365

Users can enable Office 365 integration under this tab. Office 365 enables any chat transcript emails that you send to be sent via your Office 365 account.
Change password

Once a user is already logged in, each user can reset their password under the change password tab.
About

The about tab displays the current modern client version and the ability to check for updates.
ONE TECH COMPANY.
TWO GLOBAL OFFICES.
THREE CLEVER PRODUCTS.
TENS OF THOUSANDS OF CUSTOMERS, IN HUNDREDS OF COUNTRIES.

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