WhosOn 2018
Settings portal
# WhosOn 2018

## Contents

- **Settings portal** ................................................................. 4
- **Dashboard** ........................................................................... 6
- **Site settings** ................................................................. 8
  - Tracking code ................................................................. 9
  - Advanced site options .................................................. 10
  - User settings ................................................................. 11
  - Adding & editing users .................................................. 12
  - User groups ................................................................. 15
  - User skills ................................................................. 16
  - Canned responses ......................................................... 17
  - Work period ................................................................. 18
- **Chat designer** ................................................................. 19
  - Chat window design ..................................................... 20
  - Chat window option ..................................................... 22
  - Start chat survey .......................................................... 22
  - In chat messages .......................................................... 23
  - End chat survey ............................................................ 24
  - Offline settings .............................................................. 25
  - Chat text rules .............................................................. 26
  - Chat routing ................................................................. 29
  - Chat languages ............................................................. 31
- **Configuration** ................................................................. 32
  - Dynamic invites ............................................................ 33
  - Site alerts ................................................................. 35
  - Prospect detection ......................................................... 36
  - Exclusion ................................................................. 37
  - Page exclusions .......................................................... 37
  - IP address exclusions .................................................... 37
  - Keyword/referrer exclusions ........................................ 37
  - Country exclusions ...................................................... 37
- **WhosOn client** ............................................................... 38
  - Chat wrap up ............................................................... 39
  - Custom client form ....................................................... 40
  - Client chat options ....................................................... 41
- **Advanced** ................................................................. 42
  - Notification ................................................................. 43
  - File transfer ............................................................... 44
  - Manual link ............................................................... 45
  - Remote & video ........................................................... 46
  - Email transcript template ............................................. 47
  - Data deletion ............................................................... 48
WhosOn settings portal

The WhosOn settings portal is used to configure WhosOn. Here, you can create/modify options such as users and user groups, chat window design and behaviour, global canned responses, chat routing, and client options. Only users with Administrator or Supervisor roles can access the settings portal.
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.

**Important**

**Dashboard**

On login you will be greeted by the chat dashboard. Dashboard is a data visualization tool displaying the current status of agents, total chats taken, missed chats, and average visitor wait time.

- **Total chats**: Total number of chat requests
- **Missed chats**: A missed chat is when a visitor starts a chat but is not picked up by an operator. This will include chats that operators have failed to pick up and chats that have come through when no operators are available
- **Agents online**: The number of agents logged in online status
- **Agents away**: The number of agents logged in away status
- **Average rating**: The average visitor rating of chat sessions
- **Average sentiment**: The average sentiment score calculated for chat sessions
- **Average visitor wait time**: The average time between the chat request and the start of the session, measured in seconds
- **Average chat time**: The average length of a chat session, measured in seconds

<table>
<thead>
<tr>
<th>Metric</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Chats</td>
<td>7</td>
</tr>
<tr>
<td>Missed Chats</td>
<td>2</td>
</tr>
<tr>
<td>Agents Online</td>
<td>3</td>
</tr>
<tr>
<td>Agents Away</td>
<td>1</td>
</tr>
<tr>
<td>Average Rating</td>
<td>4</td>
</tr>
<tr>
<td>Average Sentiment</td>
<td>65</td>
</tr>
<tr>
<td>Average Visitor Wait Time</td>
<td>11</td>
</tr>
<tr>
<td>Average Chat Time</td>
<td>575</td>
</tr>
</tbody>
</table>
WhosOn 2018
Site settings

Site settings
Each monitored site has its own properties and tracking code. To access the site settings, you must first select a site from the site selector and select “Edit This Site”.

Tracking code
The tracking code is designed to track visitors on your website in real-time and to allow operators within your organization to interact with those visitors via live chat and proactive engagement. In addition to live visitor tracking, WhosOn also provides historical reporting of visitor activity, chat sessions and operator activity.

The tracking code can be viewed from the site properties. It will need to be copied and pasted into website page(s) where you would like the chat button to appear.

```
<!-- Embedded WhosOn Start -->
<script type='text/javascript' src='//gateway.whoson.com/include.js?domain=www.test.com'></script>
<script type='text/javascript'>
if(sWOTrackPage)sWOTrackPage();
</script>
<!-- Embedded WhosOn End -->
```

* Note: If using stacked chats or the inline chat options, you will need to paste this code just before the closing tag for the body `</body>`.
Opening hours

The opening hours option enables you to define the opening hours for the selected site. If you set a time period as inactive, the chat status shown on your website via the WhosOn tracking code will show as ‘offline’ - regardless of operator availability.

Site advanced options

Advanced site options can be viewed by selecting the “Show Advanced Options” button at the bottom of the site properties page.

Home page for this site — Lets you accurately set the default home page of your website

Contact email — Is required as a global contact for the site

Apply chat configuration lock — Lets you lock the chat window design from being changed
User settings

In the user settings, you can create/modify user accounts and create and assign users to groups. To access the WhosOn client, each user must have a user account set up for them. You can add a user via the ‘Add User’ button.
Adding & editing users

When creating a user, you must enter a username and password. These will then be used by the user to log into the client.

Email address - Email address is required so that WhosOn can send password reset emails to that user via self-reset option.

Default avatar – Allows you to assign an image file to this user. If assigned, the image will appear in the chat window logo box once the user has connected to the chat session.

Max active chats - Users can chat to more than one visitor at a time. Once they hit their max active chats number, they will be marked as busy and not receive any further chat notifications.

Default role - This determines what permissions the user will have by default. Permissions can be fine-tuned under advanced options.

Group – Allows selected users to be assigned to an existing user group. Users in a group will have their permissions inherited from the group.

User skills – Lets you assign skills that can be used in the chat routing rules.

Work period - Users belonging to a work period will have their status automatically changed at the beginning and end of their designated working hours.

The other options on this screen are optional but can help your users have the best WhosOn experience.
Add user to sites

The user assigned sites contains a list of the sites that this user will be able to take chats from. There should be at least one site in the user assigned sites list for this user to be able to chat.

Under the advanced options, you can set up contact details to keep track of your users and set up permissions for each user to determine exactly what they are able to access inside WhosOn.

When editing a user, you will have the same options screen as creating a new user. Any changes that you make here will require the user to log out of the client before the changes take effect.

User properties

Auto accept chats - If enabled, the user will be sent new chat requests automatically without having to accept them as part of chat routing.

Record this users activity - Select this option to record user activity in the UserLog table in the WhosOn database.

Invisible to other users – This option allows the selected user to not appear visible to other users.
User rights

**Can edit site properties** – Allows users to access the settings portal

**Can view daily summary** – Allow users access to view client summary dashboard (modern client)

**Can take chats** – Allows users to accept chats

**Can response to missed chat** – Allows users to respond to missed chats (modern client)

**Can train/monitor chats** – Allows users to monitor other users’ chats

**Can see other departments** – Allows users to be able to see other departments

**Can view tickets** – Allows users to be able to view tickets (classic client with ticketing feature enabled)

**Can view reports** – Allow users access to WhosOn charts and reports

**Can edit local settings** – Allows users to edit their own client settings

**Can send invites** – Allow users to send invites

**Can chat to other operators** – Allow users to chat to other operators

**Can change name** – Allow users to change their display name

**Can transfer to other departments** – Allow users to transfer chats to another department

**Can video chat** – Allow users to use video chat (modern client with video chat feature enabled)
User groups

User groups are an easy way of controlling the options and permissions of a group of users. When you create a user group you will set the key options for your users. This includes both basic and advanced options, and will be applied to any users you create inside or move into the group.

If you are planning on creating multiple users, it is recommended that you create groups first. This will save time by not having to edit each user’s rights separately. Once a user is in a group you can change their options individually, but they will never have access to a setting that is not available for the group.
User skills

User skills are used to refine each user or group skills level. They can then be used as part of chat routing.
Canned responses

Canned responses are pre-set responses visible to all users. Responses contain a subject, which will appear to users who are searching canned responses, and the content which is sent in the chat.

Canned responses are automatically searchable based on their content, but you can also add keywords manually to make the response easier to find.
Work period

Work period is used to define the site opening hours. They can also be assigned on an individual user basis.

You can create work periods by using the default all days 9-5, Mon – Fri 9-5, or by defining your own hours by entering start and end times for each day.
Chat designer
Chat window design

The chat window design gives you the options for designing your chat window as it will appear to users. This includes window style, chat window size, chat window colour, and logo.
Changes you make to the options will be reflected in the window preview on the right-hand side. Some options here may only be visible when other options are selected. Options do not take effect on your site until you click “Save Changes”.

Testing the live chat window can be done from the “Test Live Window” option below the chat window preview. This will open a new window for you to review and feel.
Chat window options

Chat window options fine-tune the behaviour of the chat window contents. This includes adding pre/post chat surveys and visitor waiting message(s).

Start chat survey

The start chat survey area lets you set any pre-chat surveys. These are then presented to visitors before starting a chat.
In chat messages

This lets you set one or more waiting messages. The visitor will see these prior to an agent accepting and responding in the chat.
End chat survey

The end chat survey gives you the option to send a closing message and rating field. You can also add a link for an external survey site.
Offline settings

Offline settings allows you to define what a visitor sees if chat is offline, no operator is available, or a chat remains unanswered within a set timeframe. For example, you can display a custom message or forward the visitor to a URL.
Chat text rules

Here, you can define the site’s chat text rules to restrict certain content from being sent to the operator to visitor, or from visitor to operator. Default options are to restrict profanity and finance information such as credit card numbers.
Chat text rules

Here, you can define the site’s chat text rules to restrict certain content from being sent to the operator to visitor, or from visitor to operator. Default options are to restrict profanity and finance information such as credit card numbers.

Use the ‘Add Rule’ button to add a new rule, ‘Edit’ to alter an existing rule and ‘Delete Rule’ to remove a rule from the list. You are also able to alter rule order of action by moving the highlighted rule up and down using the arrow icons.

If... edit condition
Using the condition builder, in conjunction with the variable %chatline%, you can build rules based on matches of text. These can use regular expression or any of the other condition builder properties.

THEN send the following message to the VISITOR
In place of the detected value the WhosOn chat window will display the text that you enter to the visitor only. For example: ‘For added security your credit card number has been hidden.’
AND send the following message to the OPERATOR
In place of the detected value the WhosOn chat window will display the text that you enter to the operator only. For example: ‘The visitor has entered a credit card number. This has been excluded from the chat content for security reasons.’

Send message as
You can alter the identity of the text’s sender. This can either be the operator or a name of your choosing, such as ‘Automated Rule’ or ‘Chat Administrator’.

Send visitor message to operator?
This allows the chat line to be removed from the chat session completely.

Replace chat line text mask with
This replaces the matching characters or words with the text character of your choosing, e.g. ‘#’.

Transfer to skill(s)?
This allows the chat to automatically transfer to a specific operator with the selected skill(s).

Close chat session
This will automatically close the chat session for both the visitor and the operator.

Stop processing further rules
This will mean that no further rules in your list are met for this chat line.
Chat routing

Chat routing can use your pre-chat survey or other information about the customer to route them to different users, based on required department or skills. Chat routing is condition based. You would set up a condition, for example, looking at what option a visitor has chosen from a drop-down box in your pre-chat survey. You can then route the chat through to a group of users. Chat routing also contains advanced options for forwarding or queueing chats that match your conditions.
This section lets you set the ONLINE, OFFLINE, BUSY, and OUTSIDE opening hours behaviour of the chat routing rule. You have the ability to force operators to accept chats when they are online, send a message outside of opening hours and queue chats if all operators are busy.
Chat languages

The chat language setting allows you to enable the premium chat translation addon. You must purchase this addon to be able to use this feature.
Configuration
Dynamic invites

Dynamic invites are pop-up images that can be sent to visitors on an automated or triggered basis. The visitor can then click on these images to start the chat. You can use your own custom images when making an invite and set how it will appear on the visitor’s screen.

Designing a dynamic invite will allow you to animate the invites from the start, to positions, to fading out.
Invites can be sent using ‘Auto Send’. This means that invites can automatically be sent to visitors on certain pages, or based on certain user details. Invites are only sent in this way when you have users logged in and online.
Site alerts

An alert is a way of highlighting visitors by the way they entered your site. For example, this could be from a specific referrer, entry page, or a set of keywords (or a combination). Using the WhosOn client, you can view lists of visitors for each alert type.

The current alerts for the site are listed. These alerts are shown in the order they are checked when a visitor enters the site. More specific alerts must be moved to the top of the list, because if the ‘All Visitors’ alert is triggered first then more specific alerts will not get the chance to be checked.
Prospect detection

Prospect detection is a way of capturing prospective customers on your site, based on their browsing activity. This information is fed into your reports and can be used to send automatic invites.

You can set up detailed conditions to make sure you are able to capture your most important visitors, invite them to chat and report on their activity.
Exclusions

This option is used to define visitor and page exclusions from WhosOn views.

Page exclusions

You can exclude specific pages from WhosOn. In the ‘Exclude These Pages’ option, enter the pages you do not want to see in your WhosOn results. Separate multiple pages with a semicolon.

You can use wildcards if required. For example, support/*.* would block all pages in the support folder, hidden*.htm would block all pages beginning with ‘hidden’.

**Note:** These excludes only stop the pages from showing in WhosOn – they do not stop visitors from viewing them.

IP address exclusions

You can also exclude certain visitors from WhosOn results. Most often this is used to exclude yourself – so your own visits don’t inflate the visit totals. Again, you can use wildcards. Enter the IP addresses you wish to exclude, for example, 192.168.* would exclude all visitors with IP addresses beginning with 192.168

Keyword/referrer exclusions

This entry allows you to specify customers that were referred by websites with certain keywords.

Country exclusions

This entry allows you to specify one or more countries to exclude. Any visitors from the countries specified will not appear in WhosOn. You can specify the country name or country code. Separate multiple countries with a semicolon.

**Note:** Excluded visitors will also be prevented from starting chat sessions.
WhosOn client
Chat wrap up

This allows you to set a wrap up survey for the operator to select that pertains to the chat.
Custom client form

This configuration lets operators have the ability to view a populated web form that is external to WhosOn. You can populate the custom client form with a URL to a particular page or form, and it will then load alongside the chat session for the operator. This can be used for further feedback from the operator. Or, it can direct to a custom CRM page for populating further customer information.
Client chat options

This section lets you configure the pending chats levels and additional client features.

Pending chats show as level one – The colour of the pending chat session changes to orange and sends a notification reminder to the clients after X seconds.

Pending chats show as level two – The colour of the pending chat session changes to red and sends a final notification reminder to the clients after X seconds.

Enable emojis in modern client – This enables operators’ modern client to display the emoji selector, that can be sent to visitors during a chat session.

Enable operator preview of visitor typing – This provides operators the ability to visually see what the visitor is typing in real-time, prior to chat text being sent across to the operator.
Advanced
Notification

This area lets you add/delete recipients that will be receiving email notifications for missed chat, left message, and a copy of chat transcript if enabled.
File transfer
This option is used to enable the file transfer options between visitor and operator to be available during chat sessions.

Allowed file extensions
Enter the list of file extensions you will allow to be uploaded. The default is pdf, doc, docx, rtf, txt, jpg, gif, bmp, and xml.

Allow operators to send files
Select this option to allow operators to be able to send files to visitors during chat sessions for the current site.

Remove sent files older than
The WhosOn server keeps a copy of files transferred so that they can be easily selected in future chat sessions. Enter the number of days that the server should keep this file.
Allow visitors to upload files
Select this option if you want to allow visitors to be able to upload files during chat sessions.

Automatically show upload button
This option lets the visitor click the upload button in the chat window to upload a file, without prior permission from the operator.

Remove uploaded files older than
The WhosOn server keeps a copy of files transferred so that they can be easily selected in future chat sessions. Enter the number of days that the server should keep this file.

Manual link
Manual chat links can be used on any page elements within your site. You can also use them in email signatures or in any other form of document that supports web links.
Remote & video addons

The remote & video addons let you enable the remote assistance within the WhosOn classic client and the video chat option in the modern client. Once remote assistance is enabled, you will be able to see and control the visitor’s desktop during a chat session. (After the visitor has accepted the remote-control invitation.)
Email transcript template

The email template lets you customize the look and feel of your site’s chat transcript.
Data deletion

WhosOn can automatically remove visit, page view & exception records from the WhosOn database that are older than the number of days specified. The data deletion section also allows for easier GDPR compliance by anonymising visit records.
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OF COUNTRIES.

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