CustomerReach User Guide

Version 3.0

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1 Getting Started

1.1 Overview

CustomerReach allows you to provide live chat on your web site and monitor visitor activity in real-time. With CustomerReach, you can track visitors as they navigate through your site, see what keywords they used to find your site and invite visitors to chat with you.

1.2 How CustomerReach Works

To begin using CustomerReach, you need to download and install the CustomerReach agent software. After you install the agent software, you can register to obtain an account. The next step is to install the CustomerReach tags on your web pages.

The chat button tag appears as a chat button on your web pages. Visitors can click the chat button to initiate a chat. The chat button will indicate when you are online or offline. Visitors will be prompted to leave a message if the chat button is clicked while you are offline.

The visitor tracking tag allows you to see when visitors are on your site. When a visitor navigates to a page with this tag, you will hear a sound alerting you of the visitor. This tag also allows you to send chat invitations to visitors.

The agent software displays information about visitors while they are on pages that have the visitor tracking tag on them. When a visitor requests a chat, the agent software notifies you of the request and allows you to chat with the visitor.

2 Installing CustomerReach

2.1 Installation

Downloading and Installing the CustomerReach Agent Software

The CustomerReach Agent application can be downloaded at
http://www.customerreach.com/CustomerReachSetup.exe.

To start the installation immediately, click ‘Open’ or ‘Run this program from its current location’.

The installation program will walk you through installing CustomerReach.

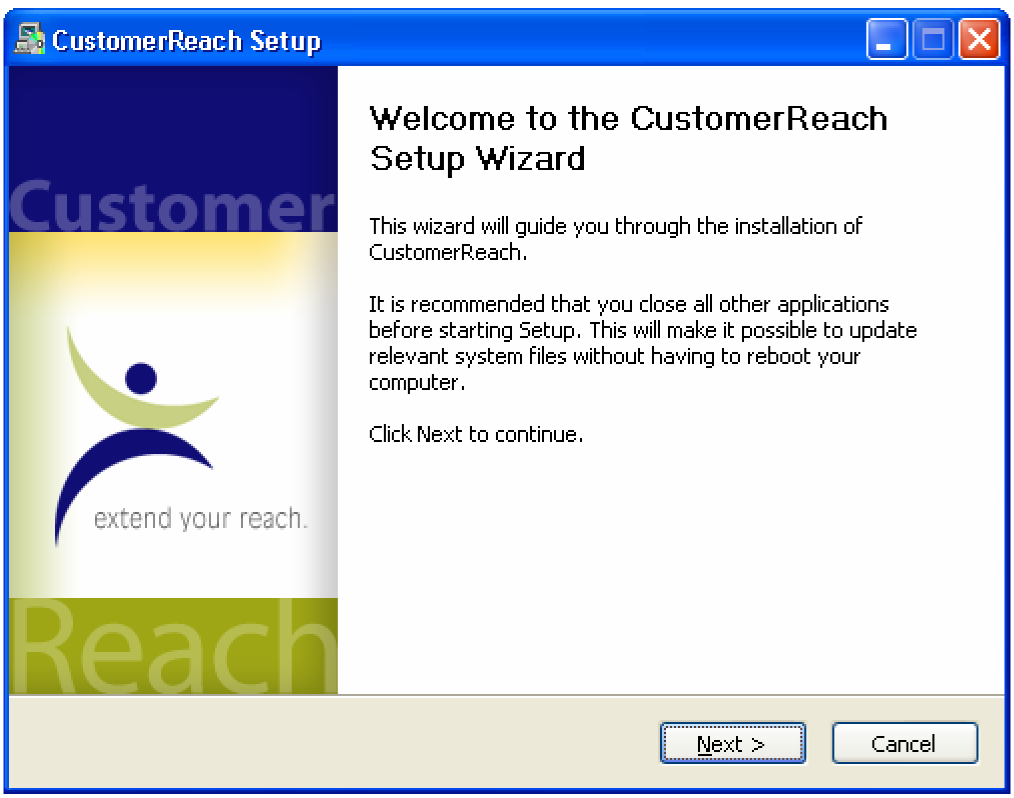

Figure 1 - Installation Program

After the installation program finishes, you can start CustomerReach from the ‘Start’ menu. The CustomerReach tray icon will be displayed near the clock while CustomerReach is running. After CustomerReach has been installed on your site, a sound will play when a visitor arrives or requests a chat and CustomerReach is minimized. Double-click on the icon to activate CustomerReach.

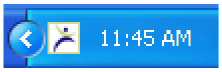

Figure 2 - CustomerReach Tray Icon

Creating an Account and Logging In

The login screen is displayed when CustomerReach starts. If you have not yet registered, the registration form will be displayed.

Registering for an Account (Site ID)

On the Login screen, click on the 'Sign Up…' button to display the registration form. Follow the instructions to create an account. Once your account is generated, you will be assigned a site id. You will need the site id when logging in.

Logging In

To log in, enter your user name, password and site id. If you have forgotten your password, click on the 'Lost Password…' button. Follow the instructions to have your login information e-mailed to you. Once you have logged in, your status will be set to 'Online'. The chat button on your web site will indicate you are online and available to accept chats. When a visitor browses a page that has the visitor tracking tag on it, the visitor will be displayed in the visitor list.

Figure 3 - The Login Screen

Installing CustomerReach on Your Website

To add CustomerReach to your web site, you need to place two HTML tags on your web pages. One tag displays the chat button, the other enables visitor tracking and invitations.

Figure 4 - The chat button appears where you place the chat tag

Obtain the CustomerReach Tags

1. Log in to the CustomerReach Agent Software
2. Select the ‘CustomerReach’ menu.
3. Select ‘Manage Account’
4. Log in to the administration console using your user name, password and site id.
5. Select the ‘Setup’ menu.
6. Select ‘Web Site Tags’
7. Copy the HTML for the Chat Tag and place it on your web pages where you want the chat button to appear.
8. Copy the HTML for the Visitor Tracking tag and paste it just before the body end tag (</body>) on the web pages you want to monitor.

2.2 Account Administration

Use the administration console to setup and configure your account.

To Access the Administration Console

1. Log in to the CustomerReach Agent Software
2. Select the ‘CustomerReach’ menu.
3. Select ‘Manage Account’
4. Log in to the administration console using your user name, password and site id.

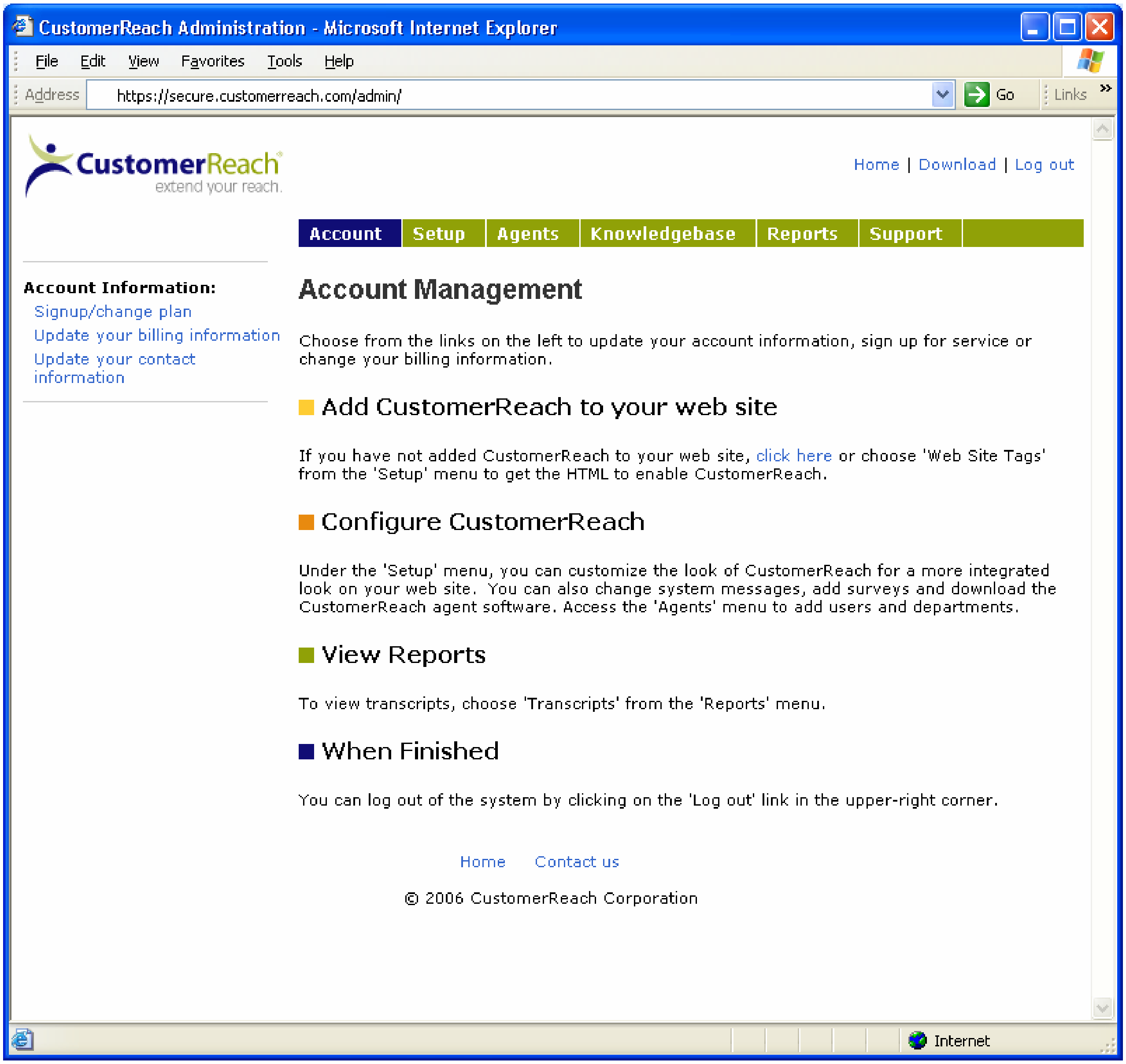

Figure 5 - Administration Console

Adding Users

1. Select the ‘Agents’ menu
2. Select ‘Users’
3. Click on ‘Add a User’ under ‘User Tasks’
4. Enter the user information

Adding Departments

1. Select the ‘Agents’ menu
2. Select ‘Departments’
3. Click on ‘Add a Department’
4. Enter the department information.
5. Next, edit each agent that is in the department and make them a member of the department.

Pre-chat Survey

The pre-chat survey can be configured to ask the visitor questions before a chat begins. For example, you can configure the survey to ask the visitor for their order number.

Configure the Pre-chat Survey

1. Select the ‘Setup’ menu
2. Select ‘Surveys’
3. Select ‘Pre-chat’ under ‘Survey Type’

Configuring System Settings

Select the appropriate menu item under ‘Setup’ to change system settings including images, system text, the chat window and surveys.

3 Agent Software

3.1 Overview

The agent software is the program you use to chat and interact with visitors.

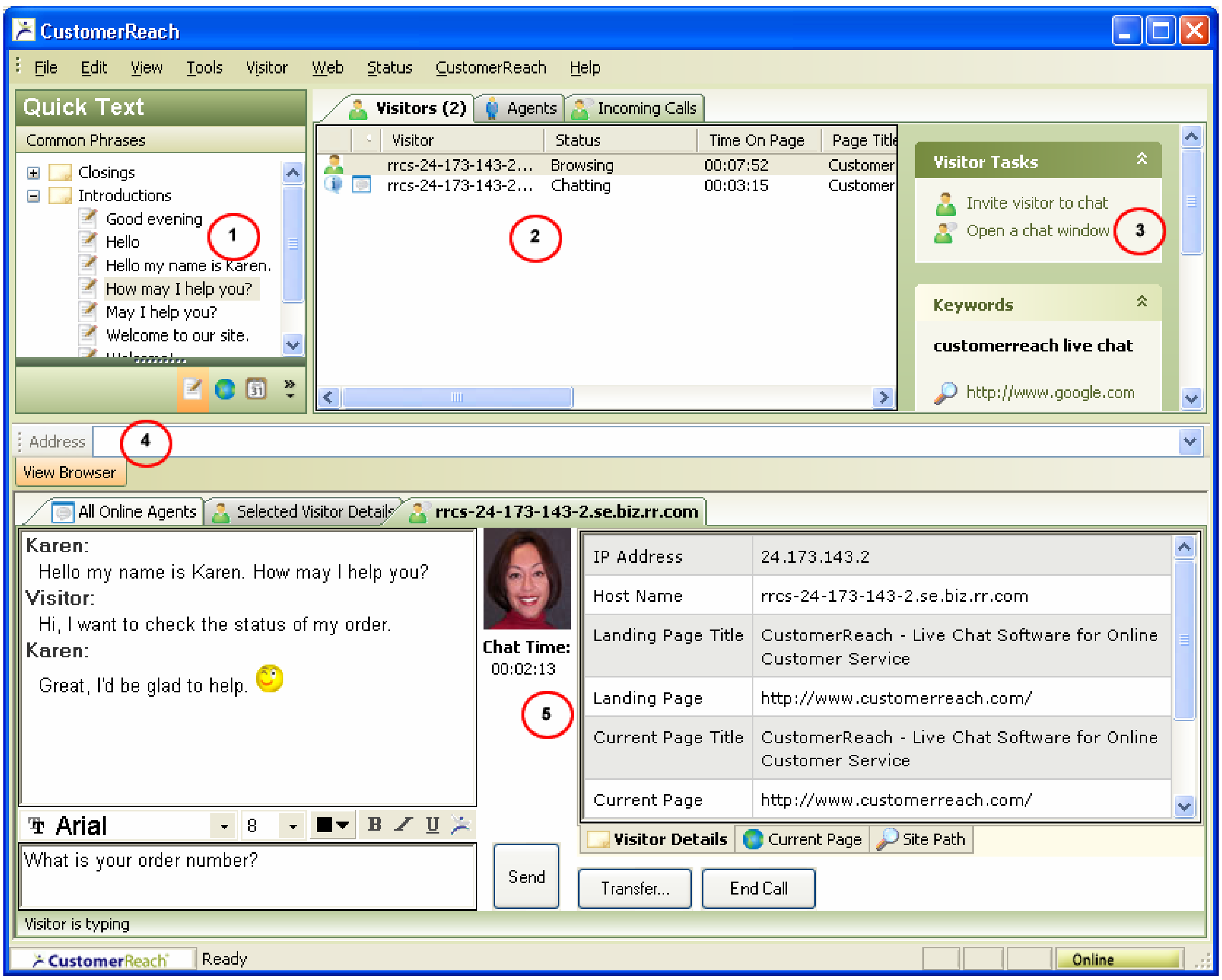

Figure 6 - Agent Software

Item	Feature	Description
1	Quick Text	The 'Quick Text' feature provides quick access to frequently used sayings and URLs. Double-click on an item to send it to the current chat. Right-click to add, edit, or delete an item.
2	Visitor List	The visitor list displays current visitors the visitor's status, the agent handling the call, and visitor details.
3	Task Area	The task area displays available actions for the current visitor. It also displays visitor information such as keywords, if they are available.
4	Integrated Browser	The integrated browser allows for quick and easy web browsing and pushing pages.
5	Chat Area	The chat area displays current conversations, information about the current visitor and the agent group chat window.

3.2 Chatting With Visitors

When a visitor requests a chat, their status changes to 'Requesting Chat' in the visitor list.

To Accept the Chat Request
Double-click on the visitor or select the visitor and choose 'Accept chat request'.

To Deny the Chat Request
To deny the chat request, right-click on the visitor then choose 'Reject Call'.

When a chat is accepted, a chat window tab for the conversation is added to the chat area. Click on the 'End Call' button to end the conversation.

Note: You will not be alerted of the chat request if you have 'Departments' enabled and you are not a member of the department the visitor has selected.

3.3 Agent Software Features

All Online Agents

The 'All Online Agents' tab allows you to communicate with all logged on agents. When a message is entered, it is sent to all logged in agents.

The Integrated Browser

The integrated browser allows you to browse the web without leaving CustomerReach. It also allows you to navigate to a page and send the link to a visitor.

Change the Integrated Browser's Default Page

Navigate to the page in the integrated browser then choose 'Set Current Page as Default' from the 'Web' menu.

Quick Text

Quick text provides quick access to commonly used phrases and URLs used during a chat.

Adding a New Item

To add a new item, right-click in the area where the quick text items are listed and choose 'Add Item'. **Note:** do not click on an existing item.

Editing an Item

To edit an item, right-click on the item and choose ‘Edit…’. When finished editing the item, choose ‘OK’. To cancel the edit, choose ‘Cancel’.

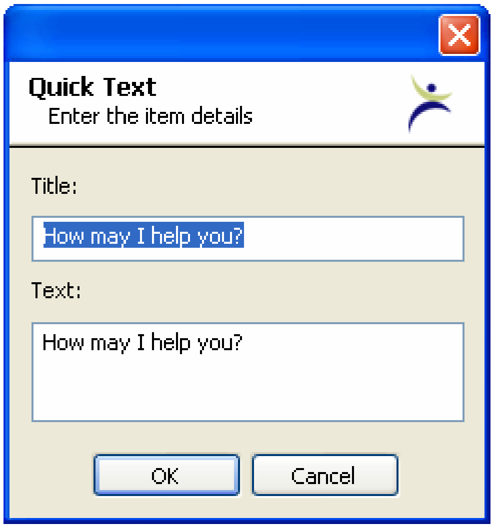

Figure 7 - Quick Text Edit Screen

Deleting an Item

Right-click on the item and choose ‘Delete’ to delete the item.

3.4 Sending Web Pages

To open a web page for the current visitor, navigate to the page you want to push then choose ‘Push Page to Current Visitor’ from the ‘Visitor menu. To push a page listed in the ‘Frequently Used URLs’ list, right-click on the URL and choose ‘Send’. To send a link to the page, choose ‘Send Page as Link’ on the ‘Web’ menu.

3.5 Transferring Calls

To transfer the current visitor, click on the ‘Transfer Call’ button. The ‘Transfer Call Request’ window is displayed if there are agents that can accept the call. To complete the transfer, select an agent to transfer the call to and click on ‘Transfer’.

3.6 Opening a Chat Window for the Current Visitor

To automatically open a chat window for a visitor, first, select the visitor then choose, ‘Open a Chat Window’ from the ‘Visitor’ menu.

Note: The chat window could be blocked if the visitor has a popup-blocker installed. The recommended way to invite the visitor to a chat is to send an invitation.

3.7 Agent Software Menus

File Menu

Item	Description
Sign In	Logs you in to CustomerReach. When you are logged in, you'll be able to view visitor information and chat with visitors.
Sign Out	Logs you out of CustomerReach.
Save Chat	Saves the transcript of the current chat session.
Exit	Logs out of CustomerReach and exits the software.

Edit Menu

Item	Description
Undo	Undo the last action.
Cut	Cut the selection and put it on the clipboard.
Copy	Copy the selection and put it on the clipboard.
Paste	Insert clipboard contents.
Select All	Select all of the text in the current window.

View Menu

Item	Description
Quick Text	Shows or hides the 'Quick Text' window.
Adjust Layout	Moves the windows into their recommended positions.
Use System Theme	Use the current system colors for the CustomerReach windows.

Tools Menu

Item	Description
External Tools	Allows you to add commands to run external programs from the menu
Check Spelling	Checks the spelling of the current window.
Send E-mail	Sends an e-mail using the default e-mail client.
Settings	Displays configuration information.

Visitor Menu

Item	Description
Invite Visitor to Chat	Sends an invitation to chat to the current visitor.
Open a Chat Window	Automatically opens the chat window for the selected visitor.
Accept Call	Accepts the current visitor's chat request.
End Call	Ends the call with the current visitor.
Transfer Call	Transfers the call to another agent.
Push Current Page	Pushes the page in the integrated browser to the current visitor.
Send Current Page as a Link	Sends the current visitor a link to the page in integrated browser.
Next Response	Moves to the next visitor waiting for a response.

Web Menu

Item	Description
Push Page	Pushes the page in the integrated browser to the current chat.
Send Page as a Link	Sends a link to the page in integrated browser to the current chat.
Set Current Page As Default	Sets the page currently displayed in the integrated browser as the default page.

Status Menu

Item	Description
Available	When your status is 'Available' you are able to accept calls from both visitors and other agents.
Away	The 'Away' status indicates you are not available for chatting.
Be Right Back	The 'Be Right Back' status sets your status for other agents.
Busy	The 'Busy' status is indicates you are not available for chatting.

CustomerReach Menu

Item	Description
Home Page	Opens a browser and navigates to CustomerReach's home page.
Manage Account	Opens a browser and navigates to the login area of the CustomerReach web site.
Getting Started	Displays instructions on how to get started.
Sign Up	Displays the order form for signing up for CustomerReach service.

Help Menu

Item	Description
Technical Support	Displays the CustomerReach technical support page.
Frequently Asked Questions	Displays frequently asked questions about CustomerReach.
Send Feedback	Use this feature to send enhancement requests, questions or comments you have to CustomerReach.
About CustomerReach	Displays copyright information and the current version of CustomerReach.

4 Settings

4.1 Agent Settings

The settings dialog box allows you to configure settings within the agent software.

To Access Settings

1. Choose the 'Tools' menu
2. Choose 'Settings'

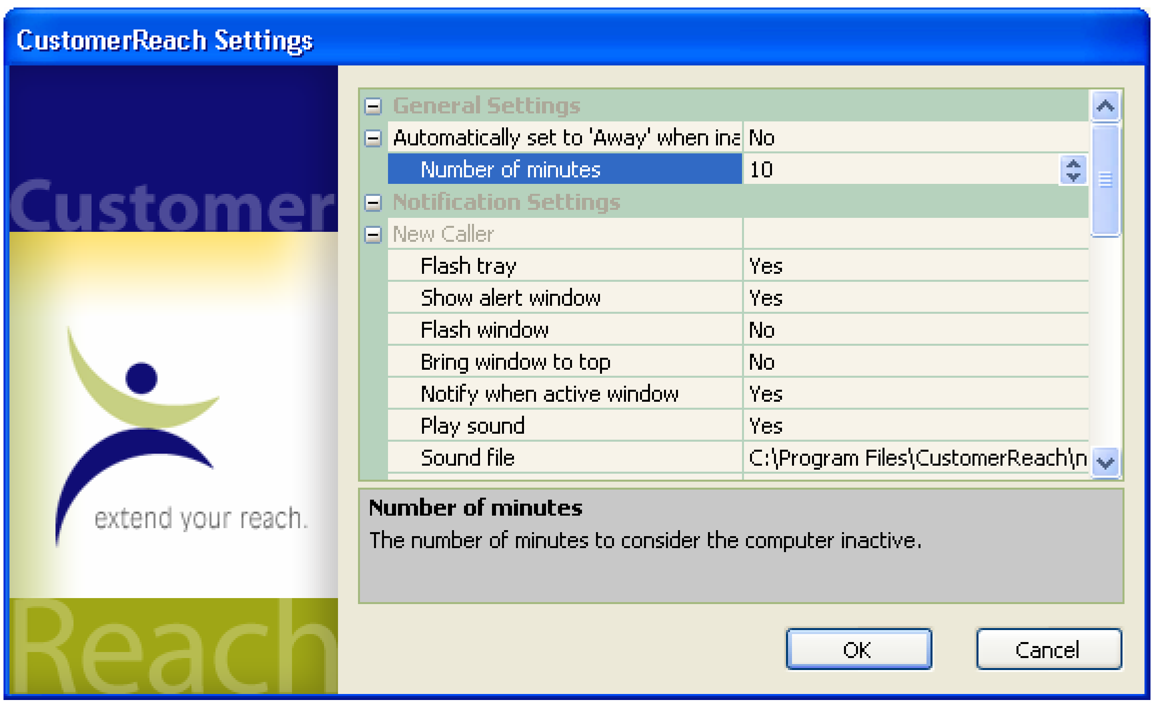

Figure 8 - Settings Screen

General Settings

The General Setting section allows you to specify whether or not to start CustomerReach when your computer is restarted, set your status to 'Away' when your computer is inactive and change the format of the date and time.

Notifications

Notification options allow an agent to choose how to be alerted when

- A visitor requests a chat
- A visitor arrives on the site
- A new message arrives

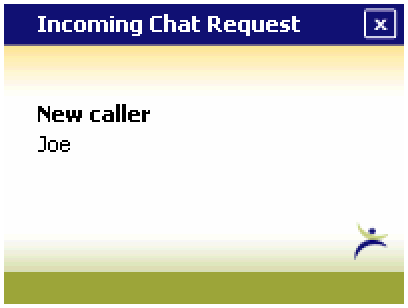

Figure 9 - The alert window

Spell Checker Settings

The Spell Checker Settings section allows you to configure the spell checker. During a conversation your spelling is checked automatically. If you type a word that the spell checker doesn't recognize, it will be underlined with a red wavy line. Right-click on the word to see spelling suggestions.

5 Agent Tasks

5.1 Responding to Chat Requests

Accept a Chat Request

1. Double-click on the visitor requesting the chat

Or

1. Select the visitor requesting the chat in the Visitors list
2. Choose ‘Accept chat request’ in the Task Area

Refuse a Chat Request

1. Right-click on the visitor in the visitor list
2. Choose ‘Reject call’

5.2 Transfer a Call

1. Click on the ‘Transfer Call’ button in the Chat Area
2. Select an agent to transfer the call to
3. Choose ‘Transfer’

5.3 Join a Call in Progress

1. Select a visitor in the Visitor List that is currently chatting
2. Choose ‘Join the call’ in the Task List

5.4 Monitor a Call

1. Select a visitor in the Visitor List that is currently chatting
2. Choose ‘Monitor the call’ in the Task List

Note: When you monitor a chat, messages will be sent only to agents that are on the chat. Messages will not be sent to the visitor.

5.5 Inviting a Visitor to Chat

1. Select a visitor in the Visitor List that is currently browsing
2. Choose ‘Invite visitor to chat’ in the Task Area

Or

1. Right-click on the visitor in the Visitor List
2. Choose ‘Invite Visitor to Chat’

A chat invitation is displayed to the visitor.

Figure 10 – The Visitor Invitation

6 Additional Information

6.1 Contacting CustomerReach

If you have any feedback, questions or comments, please contact CustomerReach by visiting http://www.customerreach.com. You can also send e-mail to info@customerreach.com or call toll-free at 1.877.292.7367.