

WebsiteAlive Operator Panel

A WebsiteAlive How-To Guide



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This document will help you familiarize yourself with the WebsiteAlive Operator Panel covering our various login methods, adjusting various settings, taking your first live chat, tracking visitors and much more.

▶ If you need further assistance, help or support, please feel free to visit us at www.websitealive.com for more information.

Logging In as an Operator

1. Go to www.websitealive.com
2. Click on **Log In** in the top right corner of the main menu.
3. Once the form appears, please fill in your login information
4. When prompted, select **Operator** from the 2 available options.

You should now be successfully logged in as an Operator!

Login Portals:

From our home page: www.websitealive.com

From our dedicated login page: www.websitealive.com/login

Reminder: In order to complete any steps within this guide, you must have access to your Operator Account. If you do not have access, please ask your Administrator for permission.

Login Options

Web Browser:

1. Please go to www.websitealive.com, then click on Login at the top right corner of the screen. You can also login via our dedicated login screen: www.websitealive.com/login.
2. Fill in your login information.
3. Click the **Login** button.
4. Make sure to select **Operator** from the corresponding login screen.

Android:

Visit this address on your Android device:

<http://go.websitealive.com/phone/>

iPhone & iPad App:

1. Click on **Basics > Apps & Add-Ons**
2. Click **Download in App Store** next to the iPhone image.
3. Once the download is complete, install on your iPhone via iTunes and run the app.

Google Chrome Extension:

Please click the link below to download the extension. This link also appears next to the login on our website for easy access.

<https://chrome.google.com/webstore/detail/alivechat/lfkhejb-klkddgfmmandfilejdinegdpi>

Windows and Mac Desktop Apps:

Download our Windows Desktop App and use WebsiteAlive's solutions on your PC without the need for a web browser.

1. Visit our website at www.websitealive.com
2. Click **Log In**
3. From the dropdown, select the app that matches your operating system.

Changing Passwords & Logging Out

How to Change Your Password

1. Once you are logged in, click your name in the top right corner of your screen.
2. From the list, select **Account & Profile**.
3. Next to Password, click the **Change Password** button.
4. Enter your new password in both fields, then click **Update Password**.

*NOTE: In order to change your password, you must already be logged into your account.
If you do not know or have forgotten your password, please speak with your Administrator.*

How to Log Out as an Operator

 [log out](#) Log out by clicking the **Log Out** button at the top right of the Operator Console.

ENGAGING YOUR VISITORS

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How to Toggle Between ONLINE and AWAY Modes

At the upper right of your Agent/Operator screen, you will see the **ONLINE** button. Click this to toggle between **ONLINE** and **AWAY** modes.

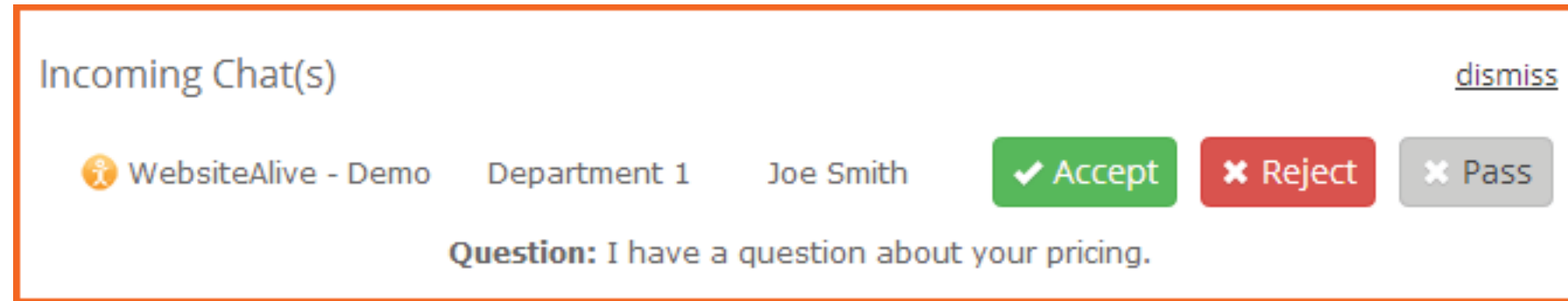


ONLINE Mode When in ONLINE mode, you are able to accept, transfer, and pass live chats. If you are the only agent online, this will keep your call to action on your website, showing that an agent/operator is online.



AWAY Mode When in AWAY mode, you will not receive any incoming live chats. Depending on your Administrator settings, your call to action may go into offline mode, asking your website visitors to leave you a message.

How to Take a Chat



When a live chat comes in, you will be notified via an Incoming Live Chat Request, which will give you the option to **Accept, Pass or Reject** the chat.

Accept: When accepting a chat, the live chat will begin normally.

Pass: Pass a live chat to another agent/operator.

Reject: Reject the chat outright.


Engaging With Other Operators Using Private/Public Chat (if enabled)

1. Click on the **AliveTracker** icon on the left side of the Operator Console
2. When there is a chat in session, you will see the word CHATTING on the right side of the visitor's details of the AliveTracker.

Click on it to view their chat:



3. Once in the chat, you will see two options at the bottom bar which you can toggle by clicking on it:

Monitoring Chat.  **PRIVATE ONLY**

PRIVATE CHAT ON

This means that ONLY the operator will be able to view any messages that are written.

PUBLIC CHAT ON

This means that BOTH the operator and the visitor will be able to see your message.

View Past Chat History & Screen Sharing

View Past Chat History

1. Click on the **History** link at the very bottom of the Operator Console.
2. From the list, click the chat transcript you wish to view.

Engage With Screen Sharing

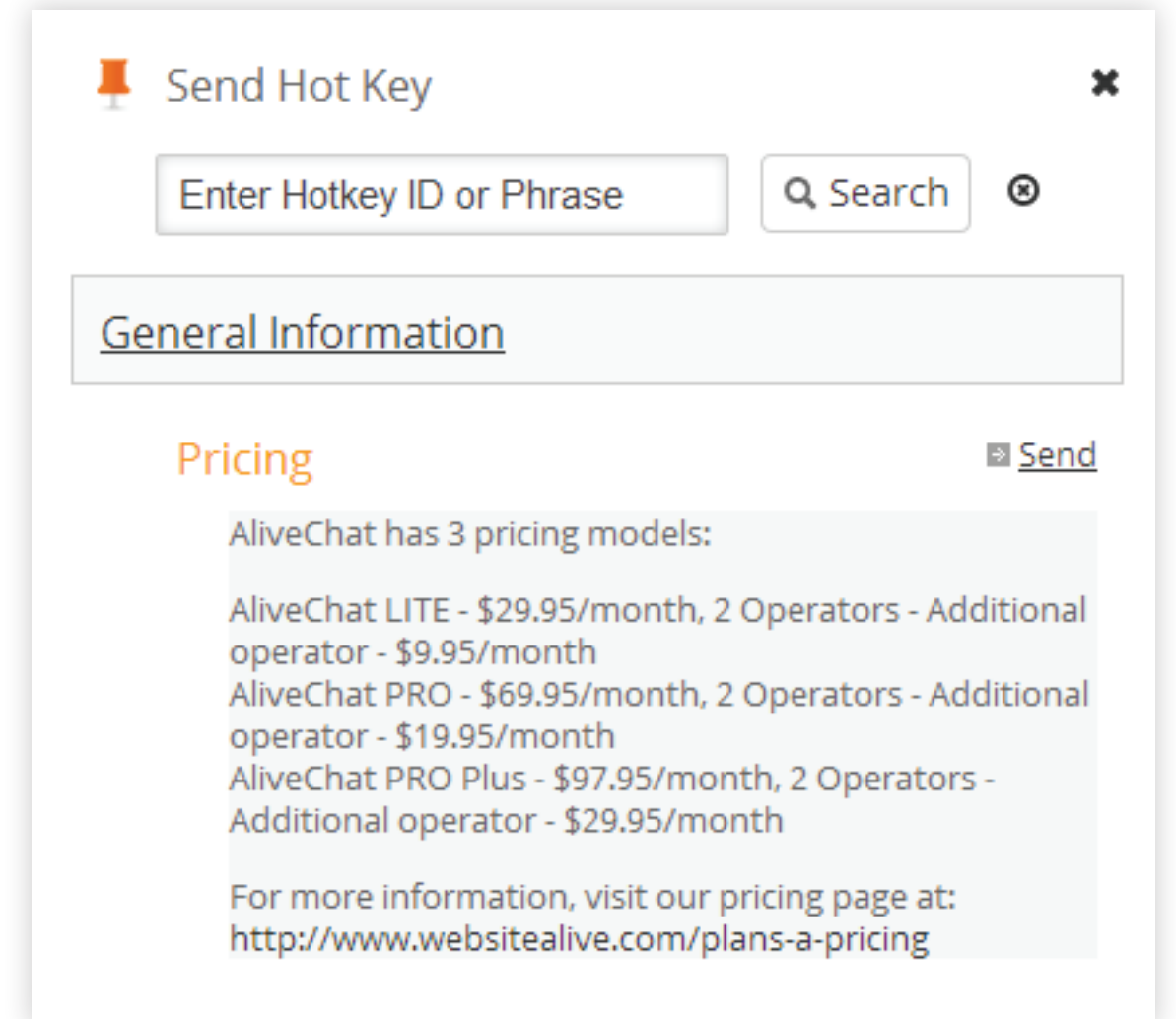
1. Once you are engaged in a chat, click on the **Screen Sharing** link near the bottom of the chat.
2. Click on the **Request Screen Sharing** button.
3. A new window will open.
4. Type in your First and Last Name and wait for the visitor to accept the screen-sharing.
5. Click **CONNECT**.



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Sending Hotkeys (Canned Phrases)

1. When you are engaged in a chat, click on the **Hotkeys** button.
2. It will open up the hotkeys in the right side panel.
3. Find the hotkey you'd like to use and click on **Send** to send it.



Hotkey Categories

NOTE: The following steps requires Administrator Access

Adding a Hotkey Category

1. Click on **Hotkey text button** at the very bottom of your screen.
2. Click **Add New Category**.
3. Give your hotkey category a Category Title.
4. Select which Operator has access to this category.
5. Associate this hotkey with one or more of your websites.
6. Click **Save Changes**.

Adding a Hotkey to an Established Category

1. Click on **Hotkey text button** at the very bottom of your screen.
2. Find the hotkey Category you'd like to add to, and click **Add Hotkey**.
3. Give your hotkey a Title and then fill in the Content.
4. Once finished, click **Save Changes** and use as needed.

Editing Hotkeys

NOTE: The following step requires Administrator Access

1. Click on **Hotkey text button** at the very bottom of your screen.
2. Find the hotkey category with the hotkey you'd like to edit.
3. Find the hotkey you'd like to edit and click on it.
4. From the dialog screen, make your edits and click **Save Changes**.



WebsiteAlive[®]
Let's Connect

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