

# Quick Start Guide

A WebsiteAlive How-To Guide



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**If you do not have a WebsiteAlive account, please feel free to give it a try for FREE for 30 days.**

Please visit [www.websitealive.com](http://www.websitealive.com) to learn more and sign up.

▶ If you need further assistance, help or support, please feel free to visit us at [www.websitealive.com](http://www.websitealive.com) for more information.

# Table of Contents

	<b>Logging In:</b>	16	AliveTracker
4	Administrator	18	Hotkeys Setup
5	Operator	19	AliveDial: Phone Number Setup
6	via Apps & Extensions	20	Reporting: Chat Transcripts
7	via Mobile Apps		
8	Setting Up Operators		
9	Setting Up Departments		
	<b>Customization:</b>		
10	Adding a Website		
11	User-Interface & Logo		
12	Call-to-Action Buttons		
14	Short URL / Text Links		
15	Embedded Icon		

# Logging In as an Administrator

1. Go to [www.websitealive.com](http://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 **Admin** from the 2 options.

You now successfully logged in as an Administrator!

# Logging In as an Operator

*NOTE: In order to review Chat Transcript results, you must be logged in as an Administrator.*

1. Go to [www.websitealive.com](http://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 In via Apps & Extensions

## Google Chrome Extension:

Download our Google Chrome Extension to log in without having to go to [www.websitealive.com](http://www.websitealive.com).

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/lfkhejbklkddgfmandfilejdinegpik>

## 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](http://www.websitealive.com)
2. Click **Log In**
3. From the dropdown, select the app that matches your operating system.

# Logging In via Mobile Apps

*NOTE: In order to install WebsiteAlive apps on your device, you will need access to your Administrator account.*

## **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.

You have successfully installed the iPhone/iPad app!

## **Android:**

Visit this address on your Android device:

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

Nothing more to it. Success!

# Setting Up Operators

*NOTE: In order to setup an Operator, you must be logged in as an Administrator.*

1. Click **Basics > Operators** from the left menu.
2. Click on the **+New Operator** button in the top right corner of the screen.
3. Provide a Username and Password then click **Create New Operator**.

You have now successfully created a new Operator!



# Setting Up Departments

*NOTE: In order to setup Departments or Sub-Departments, you must be logged in as an Administrator.*

1. Click **Basics > Departments** from the left menu.
2. Click on the **+New Department** button in the top right corner of the screen.
3. Setting up the department:
  - a. Give your Department a name
  - b. Select if it is a Sub-Department of another existing Department
  - c. Enable/Disable the Dummy Department features and enter a Dummy Message, if applicable.
  - d. Assign applicable Operators to the Department
  - e. Once all forms are satisfactory, click **Create Department**.

You have now successfully created a new Department!

# Customization: Adding a Website

*NOTE: In order to set up or add a website, you must be logged in as an Administrator.*

WebsiteAlive allows you to create separate “Window” designs for different websites. If you have multiple brands and websites, you can create unlimited designs with this feature.

1. Click **Basics > Websites, Code & Customize** from the left menu.
2. Click the **+Add Website** button at the top right.
  - a. Give your website a name.
  - b. Enable the apps you’ll use for this particular website.
  - c. Assign an internal icon for quick identification of this website (optional).
  - d. Add a description.
  - e. Select the Departments you’d like to associate with this particular website.

You have now successfully added a new Website!

# Customization: User-Interface Window & Company Logo

*NOTE: In order to set up or alter the customization of your user interface, you must be logged in as an Administrator.*

1. Click **Basics > Websites, Code & Customize** from the left menu.
2. Find the website you'd like to customize and then click the **Customize** tab from the available tab options.
3. Under **Global Settings**, select **Logo** from the available tab options.
4. Click **Upload**.
5. Once the Upload dialog box has appeared, you have 2 options available to you:
  - a. Select **Choose File** and select a new file from your hard drive, then click the **Upload Image** button.
  - b. Select an existing uploaded image from your Image Gallery.

*Note: Logos can have their padding adjusted, giving you complete control of your gutters.  
You also have the option to add a hot link to you logo; if left blank, the logo will have no hot link functionality.*

6. Click **Save Changes**.

You have now successfully added a logo to your window!

# Customization: Call-to-Action Button

*NOTE: In order to set up or alter call-to-action buttons, you must be logged in as an Administrator.*

1. Click **Basics > Websites, Code & Customize** from the left menu.
2. Find the website you'd like to customize.
3. Under Buttons, select **+New button**.
4. Once the dialog box appears, select the **Appearance** and connecting **Department** you'd like.
5. **Upload / Choose** the Online and Offline buttons you like to use.

**Online:** this is the button that appears on your website when an Operator is online and ready to take incoming live chats.

**Offline:** this is the button that appears on your website when no Operators are available to take incoming live chats.

# Customization: Call-to-Action Button

6. For more Advanced Options, click the **+Advanced Options** button.
7. Once you are finished selecting your images, click **Save Settings** at the bottom of the page.

You have now successfully added custom Online and Offline call-to-action buttons!

*Note: WebsiteAlive furnishes all new accounts with default buttons if you do not have a custom button of your own.*

▶ Code has now been generated to add your call-to-action button to your web page.

# Customization: Short URL / Text Links

*NOTE: In order to set up a text link, you must be logged in as an Administrator.*

1. Click **Basics > Websites, Code & Customize** from the left menu.
2. Find the website you'd like to customize.
3. Under Links, select the **+New** button.
4. Add the link text you'd like to use. (Example: "Connect With Us!")
5. Select which Department you'd like the text link to connect to.
6. For more Advanced Options, click the **+Advanced Options** button.
7. Once you are finished, click **Save Settings** at the bottom of the page and generate your text link code to add to a webpage.

You have now successfully created a text link!

- ▶ Code has now been generated to add short URLs & Text Links to your web page, Twitter or Facebook posts, emails or anywhere you like!

# Customization: Embedded Icon

**NOTE:** *Each website includes only one set of the Embedded Icon & Tracking Code. To create a new Embedded Icon & Tracking Code, just create a new website.*

1. Click **Basics > Websites, Code & Customize** from the left menu.
2. Find the website you'd like to customize.
3. Under Embedded Icon & Tracking Code, click on the **Edit** button.
4. Once the dialog box appears, click on the **Settings** tab.
5. Choose how and when you'd like the Embedded Icon to appear.

**Online:** this is the button that appears on your website when an Operator is online and ready to take incoming live chats.

**Offline:** this is the button that appears on your website when no Operators are available to take incoming live chats.

6. For more Advanced Options, click the **+Advanced Options** button.
7. Once you are finished selecting your images, click **Save Settings** at the bottom of the dialog box.

- ▶ Code has now been generated to add this Embedded Icon to your website.  
Click the **Code For Your Website** tab and copy/paste this code into your desired location.

**NOTE:** *In order to alter your AliveTracker settings, you must be logged in as an Administrator. Before you can see Visitors on your website in real-time and send them Proactive Invites, you must embed the AliveTracker code into your website.*

1. Click **AliveTracker > Settings** from the left menu.
2. Select the options you'd like to use:

**Enable Real-Time Monitor:** Allow Operators to view Visitors on all your websites in real-time.

**Record Visitor Traffic:** To gather data to run AliveTracker reports, you must have this enabled and have AliveTracker code installed on your website(s).

**Allow Proactive Invites:** Allow Operators the ability to manually invite Visitors on the website to engage.

**Allow Page Tagging:** Allow Operators to tag web pages seen in the real-time AliveTracker monitor. Tagging a page allows you to set up Triggers using that specific page.



# AliveTracker

**Visitor Idle Timeout:** Set the timeout value for your Visitors who access a web page with AliveTracker enabled. If they have a web page open for more than the designated number of minutes, they will automatically be removed from your real-time monitor. IF you have more than 20 visitors on your website simultaneously, we suggest you try a lower value. Default value is 30 minutes. Keeping a 'Disabled' setting will let the visitor time out when they close your web page.

3. When you have completed your option selection, click **Save Changes**.

You have now successfully set up AliveTracker!

## To view AliveTracker:

1. Select **AliveTracker -> Monitor** from the left menu.
2. Click **Launch AliveTracker Monitor**.

# Hotkeys Setup

**NOTE:** *In order to set up or alter your Hotkeys, you must be logged in as an Administrator.*

Click **AliveChat > Hotkeys** from the left menu.

In order to be able to use Hotkeys, you must first create a new category:

1. Click the **+New Category** button at the top of the page.
2. Give your category a Title.
3. Select which website you'd like to associate with the Hotkeys you will create.
4. Click **Save Changes** at the bottom of the page.

You have successfully created a new category and are ready to add Hotkeys to it.

## Adding Hotkeys to your Category:

1. Click **+Add Hotkey** within the relative category.
2. Give the Hotkey a Title.
3. Fill in your Hotkey's content.
4. Click **Save Changes**.

You have successfully added a Hotkey!

This Hotkey will now automatically appear in your Hotkeys list within the Operator Panel available when needed.

# AliveDial: Phone Number Setup

*NOTE: In order to add a phone number to your AliveDial settings, you must be logged in as an Administrator.*

1. Click **AliveDial > Settings** from the left menu.
2. Click the **+Add Phone Number** button at the top of the page.
3. Fill in the following data:
  - a. Phone Number
  - b. SMS Phone Number
  - c. A Label
  - d. Select which websites you'd like to associate with this number.
4. Click **Add New Phone Number** to save.

You have successfully set up your AliveDial settings!

# Reporting: Chat Transcripts

*NOTE: In order to review Chat Transcript results, you must be logged in as an Administrator.*

1. Click on **Reports > Chat Transcripts** from the left menu.

To query a Chat Transcript you must:

- a. Filter your search by Date Ranges
- b. Filter your search by Department(s)
- c. Filter your search by Operator(s)
- d. Filter within the Addition Filters (optional)
- e. Filter by Sort and Display results toggles

2. Once you have the applicable filters set, click the **Generate Report** button.

You have successfully generated a Chat Transcript!



Website Alive<sup>®</sup>  
*Let's Connect*

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