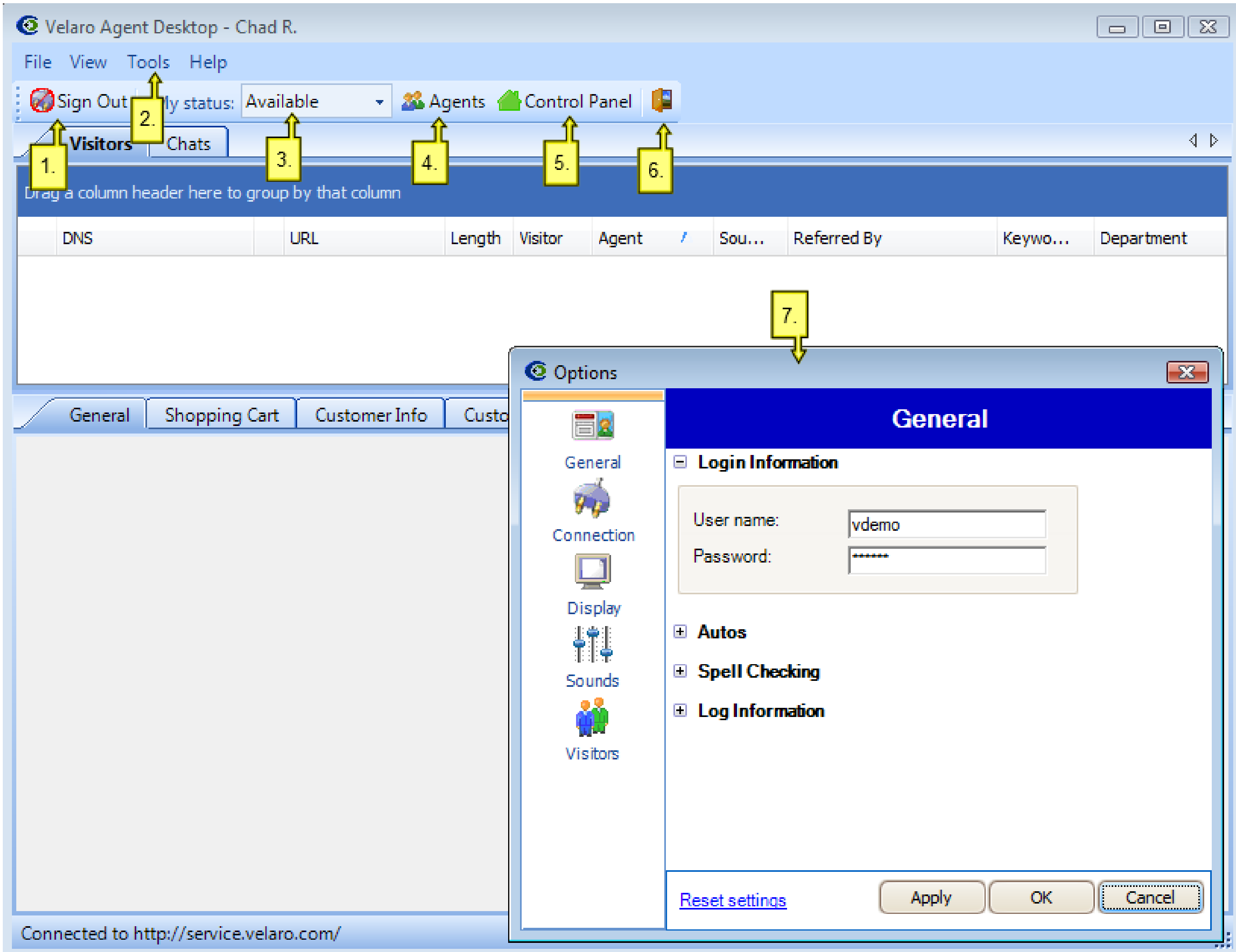
Agent Quick Reference Guide

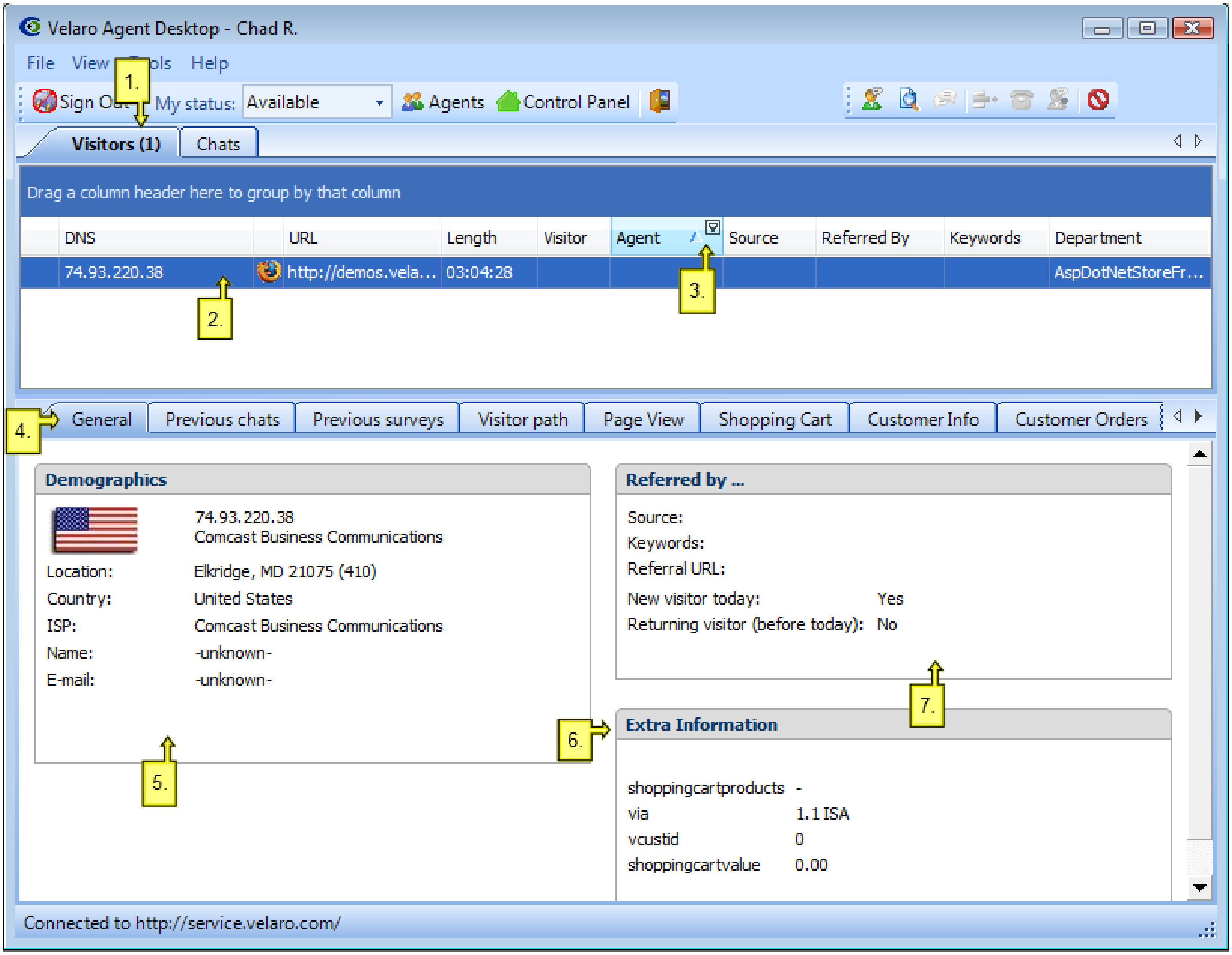
http://www.velaro.com/

1) Basic Desktop Settings



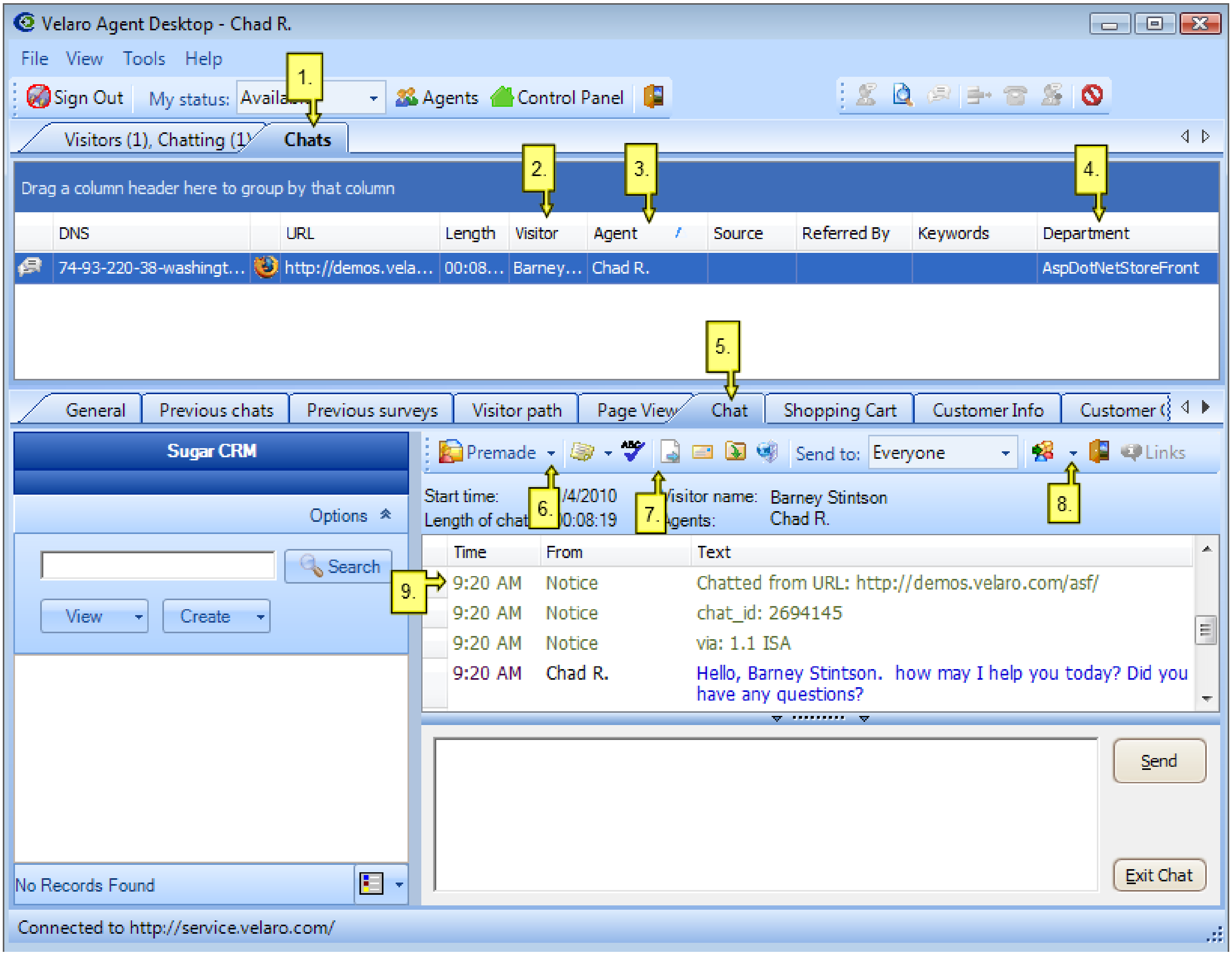
1) **Sign Out** – This button allows you to sign out of the desktop software.
2) **Tools**– You can adjust your desktop settings under ‘options’.
3) **Availability –** Set your chat availability here.
4) **Agent List –** Here you can see the list of agents logged into the system. Additionally, you can initiate an agent to agent chat by double clicking on an agent on this list.
5) **Control Panel –** Quickly access the control panel to make adjustments to your account settings and personal premade messages here.
6) **Exit –** Select this icon if you would like to sign out of the system and close down the agent desktop software.
7) **Agent Desktop Options** – This is the screen displayed after going to Tools > Options. This screen will allow you to adjust the various settings associated with the agent desktop.

2) Visitor Monitoring



1) **Visitor Monitoring Tab** – The visitor monitoring section will allow you to track visitors on the site in real time. Visitor monitoring allows you to view technical information about your visitors such as their ip address, their browser and their length of stay. Additionally, you can view marketing information about this visitor such as their source, where they were referred by, and any keywords this visitor used to get to your site.
2) **Visitors**– This line displays the information for one visitor on your site.
3) **Sorting / Filtering –** Select here to sort or create custom filters for this column.
4) **Information Tabs –** These tabs display various information associated with this visitor. This includes custom tabs which can be added to the agent desktop such as shopping cart integrations and customer account information.
5) **Demographics Section –** All demographics information we can capture about a visitor is listed here.
6) **Extra Information Section –** Any information that you have about a visitor can be sent to the desktop here.
7) **Referred By Section** – All marketing information we can capture about this visitor is displayed here.

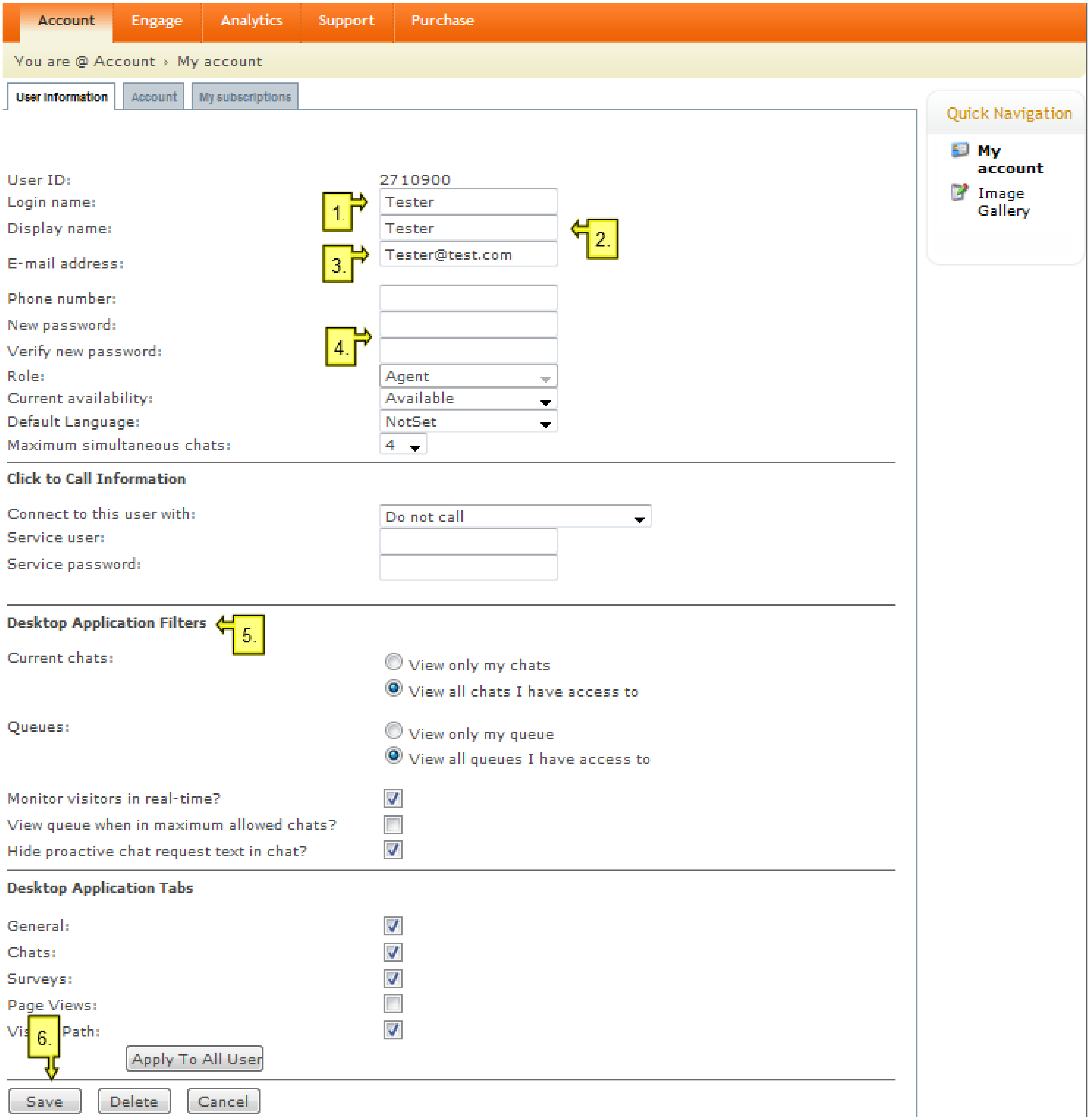
3) Chat Interface



1) **Chat Tab** – The chat tab allows you to view all of your current chats as well as any additional chats you may have access to shadow. The same technical and marketing information displayed on the visitor monitoring tab can be found here as well.
2) **Visitor Name**– This column displays the name of the visitor currently chatting.
3) **Agent Name –** This column displays the name of the agent or agents in that specific chat.
4) **Department –** This column allows you to easily see the department the visitor is directed to.
5) **Sub-Chat Tab –** This tab brings up your main chat interface for that specific visitor.
6) **Premade Messages –** Personal and shared premade messages can be selected here.
7) **Action Toolbar** – Here you have the various action buttons associated with chat. These options include spell checking, emailing the chat transcript, sending a file from your desktop, web conferencing, and much more.
8) **Chat Transfers –** Select this button to transfer a chat to another agent, department, or tier.
9) **Captured Data –** Any information captured from your site, our system, or your prechat survey will be displayed in green above the chat transcript for quick reference.

4) Adjusting User Settings

Log in to: login.velaro.com or hit your 'Control Panel' button in the agent desktop. Select **Account > My account**.



1) **Login Name** – This field cannot be changed. To change your login name please contact your account administrator.
2) **Display Name** – This is the name your visitors will see when chatting with you. Feel free to change this name as desired.
3) **Email Address –** This is the email address our system uses to send emails and transcripts to.
4) **Password Field –** You can change your Velaro password here.
5) **Desktop Filters –** Here you can adjust what data is viewed in the agent desktop. The recommended settings are above.
6) **Save –** Select save to update any changes you have made.