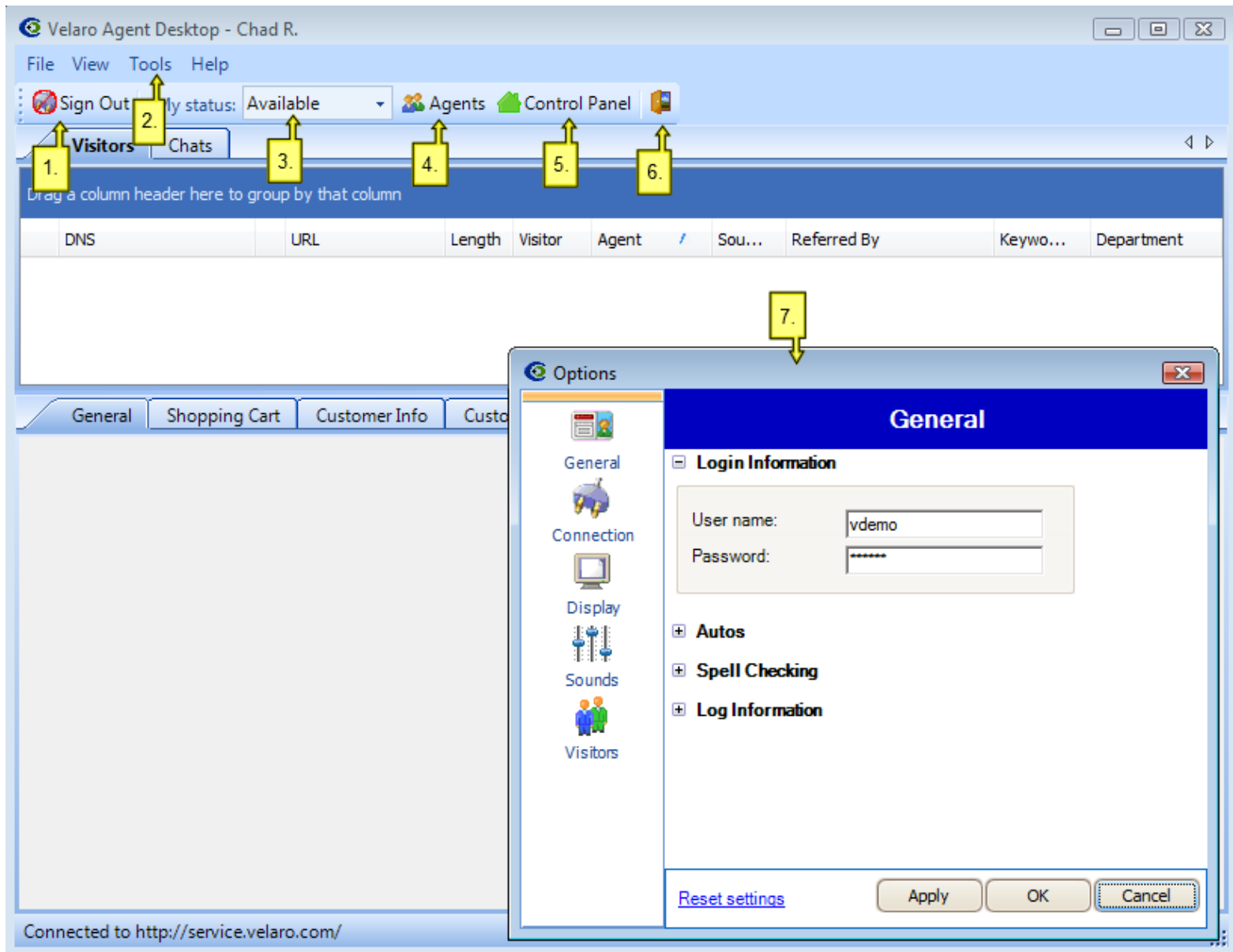




Agent Quick Reference Guide

<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

The screenshot displays the Velaro Agent Desktop interface for Chad R. The main window shows a 'Visitors (1)' tab with a table of visitor data. The table has columns for DNS, URL, Length, Visitor, Agent, Source, Referred By, Keywords, and Department. A single visitor is listed with DNS 74.93.220.38, URL http://demos.vela..., Length 03:04:28, and Department AspDotNetStoreFr....

Below the table are several information panels:

- General** (selected): Previous chats, Previous surveys, Visitor path, Page View, Shopping Cart, Customer Info, Customer Orders.
- Demographics**: Shows location (Elkridge, MD 21075 (410)), country (United States), and ISP (Comcast Business Communications).
- Referred by ...**: Shows source, keywords, referral URL, and visitor status (New visitor today: Yes, Returning visitor (before today): No).
- Extra Information**: Shows shoppingcartproducts, via (1.1 ISA), vcustid (0), and shoppingcartvalue (0.00).

Yellow callout boxes with numbers 1 through 7 point to specific features: 1) Sign Out button, 2) DNS field, 3) Agent column header, 4) General tab, 5) Demographics section, 6) Extra Information section, and 7) Referred by section.

- 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

The screenshot shows the Velaro Agent Desktop interface. At the top, there is a menu bar with 'File', 'View', 'Tools', and 'Help'. Below the menu bar, there is a status bar with 'Sign Out', 'My status: Available', 'Agents', and 'Control Panel'. The main interface is divided into several sections. On the left, there is a 'Visitors (1), Chatting (1)' tab. In the center, there is a table with columns: DNS, URL, Length, Visitor, Agent, Source, Referred By, Keywords, and Department. Below the table, there is a 'Chat' tab. On the right, there is a 'Sugar CRM' sidebar with a search bar and buttons for 'View' and 'Create'. The main chat area shows a chat transcript with a table of messages and a text input field with 'Send' and 'Exit Chat' buttons. Numbered callouts (1-9) point to various elements: 1. My status dropdown, 2. Visitor column header, 3. Agent column header, 4. Department column header, 5. Chat tab, 6. Premade messages dropdown, 7. Action toolbar, 8. Chat transfers button, 9. Captured data section.

DNS	URL	Length	Visitor	Agent	Source	Referred By	Keywords	Department
74-93-220-38-washingt...	http://demos.vela...	00:08...	Barney...	Chad R.				AspDotNetStoreFront

Time	From	Text
9:20 AM	Notice	Chatted from URL: http://demos.velaro.com/asf/
9:20 AM	Notice	chat_id: 2694145
9:20 AM	Notice	via: 1.1 ISA
9:20 AM	Chad R.	Hello, Barney Stintson. how may I help you today? Did you have any questions?

- 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**.

The screenshot shows the 'My account' settings page. At the top, there is a navigation bar with 'Account', 'Engage', 'Analytics', 'Support', and 'Purchase'. Below it, a breadcrumb trail reads 'You are @ Account > My account'. The main content area has three tabs: 'User information', 'Account', and 'My subscriptions'. On the right, a 'Quick Navigation' sidebar contains 'My account' and 'Image Gallery'. The 'User information' section includes fields for User ID (2710900), Login name (Tester), Display name (Tester), E-mail address (Tester@test.com), Phone number, New password, and Verify new password. There are dropdown menus for Role (Agent), Current availability (Available), Default Language (NotSet), and Maximum simultaneous chats (4). The 'Click to Call Information' section has a dropdown for 'Connect to this user with' (Do not call) and input fields for 'Service user' and 'Service password'. The 'Desktop Application Filters' section has radio buttons for 'Current chats' and 'Queues', and checkboxes for 'Monitor visitors in real-time?', 'View queue when in maximum allowed chats?', and 'Hide proactive chat request text in chat?'. The 'Desktop Application Tabs' section has checkboxes for 'General', 'Chats', 'Surveys', 'Page Views', and 'Vis Path'. A 'Save' button is highlighted with a yellow box and a number 6. At the bottom, there are 'Save', 'Delete', and 'Cancel' buttons.

- 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.