User

REVE Chat

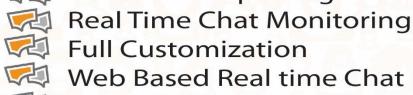


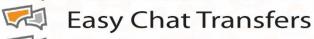












Proactive Invitations

Inter-chat between operators

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1. Introduction

In the fast paced ambience of live customer support, the efficient usage of valuable time is the main key to both happy customers and professional management. Traditionally interactions between support agents and customers have been restricted to one-on-one supports over phones or emails. Live chat for customer support has now become the alternative that today's multitasking and net savvy generation is looking for. It offers quick response in real time and higher customer satisfaction which can generate more conversions. In the era of automated customer assistance systems, the chance to chat with a person in real time through your website is a distinct feature. Offering such kind of feature in your website, especially which your competitor isn't offering can become a crucial selling point that compels your website visitors to choose your service over your competitors. So, live chat for customer service is no longer remains a novelty that once was, it has now matured into an important sales and support weapon.

1.1 What is REVE Chat?

Now just like a sales person in the shop, talk to the visitors of your website in real-time. REVE Chat is powerful and intuitive real-time customer engagement software. It puts a live person on your website to personally guide and help your visitors, while they go through the various sections of your digital display. This helps them to get the most out of your web presence, while allowing you to understand their diverse needs on a one-to-one basis. REVE Chat is easy to install and use. So place this customizable REVE Chat widget to your business and start getting sales conversion and higher customer satisfaction.

1.2 Key features of REVE Chat

No	Feature	Detail
1	Real-time Visitor Info	To know how many visitors are surfing the site right now, how many are chatting, how many in queue etc
2	Visitor Visualization	Visitor's info like city, visit time, name are visualized in right panel of chat window.
3	Chat History	Chat conversation with visitors are stored as report
4	Unlimited Website Integration	Unlimited website can be integrated using the same license
5	Concurrent Chat	Concurrent chat Capacity of agent to serve the visitors can be defined

6	Proactive Chat	Inviting visitors to chat from agents side
7	Offline Chat	Messaging facility for visitors incase all agents are offline
8	Click to call	Audio call to visitor is possible
9	Video Call	Video call is possible
10	Pre-Post Chat Survey Forms	Survey opportunity to evaluate chat session
11	Missed Chat Information	Chat which could not answered by agent due to time shortage
12	Queuing	In case of high traffic, visitors waiting time and queue position
13	Chat Transfer	Transferring Chat to other agent and admin
14	Agent Ratings	Performance Evaluation of agents by ratings
15	Limited Widget Customization	Customizations like color scheme changing of chat window, changing chat window type, survey form type etc.
16	Email Transcription	Chat can be transcribed and sent to email.
17	Print Chat Transcript	Chat Transcript can be printed
18	256 bit SSL Encryption	All the information are encrypted using these standard before transmitting
19	Basic Reporting	Basic report of visitors, chatting
20	Time Tracking	Chatting Time is logged.
21	Advanced Reporting	Details analytics of visitor and chatting
22	Geographical Visitor Identification	Visitors locations/cities are presented using google map
23	Custom Branding	Placing own logo instead of REVE Chat logo on chat window.
24	Inter-agent Chat	Agents can chat with each other in the system.
25	Chat Supervision/Monitoring	Monitoring , whispering in agents chat by admin/super admin
26	Co-browsing	Agent can help visitor open a url by using facility like Push page
27	Customized Greetings	Welcome message can be customized as per requirement.

2. Getting started

2.1 How does REVE Chat work?

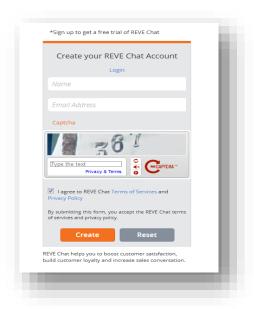
REVE Chat is very easy to use. For using this live chat software firstly you need to sign up for the free trial. After signing up for the REVE Chat service you need to login to the REVE Chat dashboard with the User ID and Password which you have got at the time of sign up process in your registered email address. In the first page of REVE Chat dashboard there is a HTML code which you need to copy paste just before the closing head tag of your website pages code (specific website html). After reloading them on your server, REVE Chat button will be activated on your website.

2.2 General

In order to start using REVE Chat, you first need to sign up for the free trial version of REVE Chat. After completion of the successful sign up process, you will get your dash board link, user ID and Password for logging in to your REVE Chat dashboard.

2.2.1 How to create an account/sign up

To create an account for the free trial of REVE Chat you need to follow the below mentioned steps:



- To sign up please click **on the '**Sign Up' link on our home page **www.revechat.com**
- Fill in the form by entering your email address and name
- A confirmation email with the verification link will be sent to your given email address

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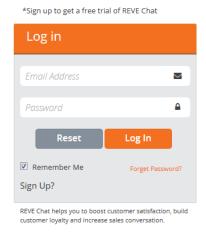
By clicking the verification link you will get the second email containing your user name, password, login link and other details

Then you need to login to your dashboard with the given user name and password

2.2.2 Logging in:

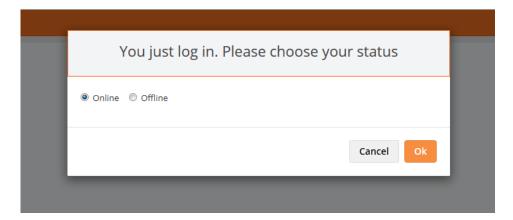
For logging in to your dashboard please follow the below mentioned steps:

- Click on the **'Sign In'** button on the header part of <u>dashboard.revechat.com</u> website or directly visit to https://dashboard.revechat.com
- Provide your User Name and Password in the blank space and click on the 'Log In' button then You will be redirected to your REVE dashboard.



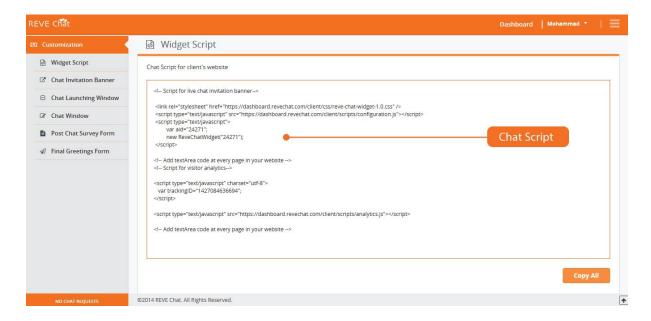
2.2.3 How to appear online:

To appear online you just need to login to the REVE Chat dashboard by entering your registered email ID and password. And after login you have to select online status.



2.2.4 How to install our script

After signing in to your dashboard, the first page appears with the chat code/script which you need to copy and paste just before the closing head tag of your website pages code (specific website html). Once it's done, REVE live chat button will be added on your website.



2.2.5 Verify the connection

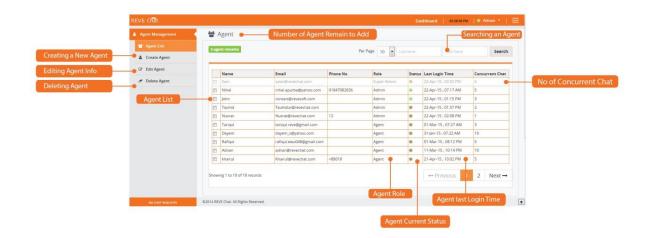
You can test whether the script has successfully integrated to your website or not by putting your website URL in the test box. You will find this test option under the chat widget page.



3. Admin procedures

3.1 Agent management:

From the dashboard you to keep a track on your agents with its special agent management feature. Here you can add your agents and see all the details like status, last login time, total no of assigned concurrent chat of each and every agent etc. In real —time which will help you to manage your support service more efficiently.



3.2 How to configuring a chat operator

Please follow the below mentioned directions to manage your agents.

After logging in to your REVE Chat dash board, click on 'Agent Management' option.

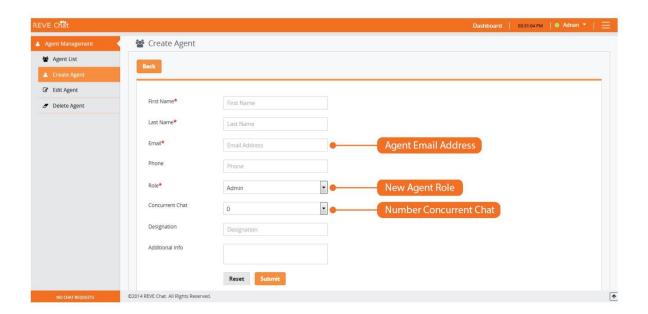
Here you will get the below mentioned information:

- List of your agent names
- Roles assigned to each and every agent
- Email address of your agents
- Phone numbers of your agents
- Status of your agents- online or offline
- Each and every agent's last login time
- Total number of concurrent chats assigned to each and every agent

3.3 Agent creation

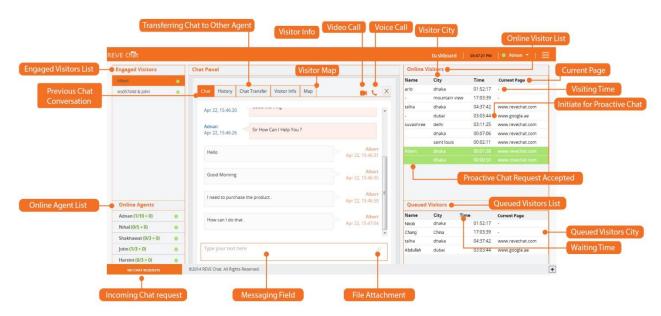
To create an agent, you need to follow the below mentioned steps:

- Login to your REVE Chat dashboard
- Click on 'Agent Management'
- For adding your agent, click on the 'Create Agent' option
- After that you need to fill up a from mentioning the email address, password, role which you want to assign to the agent, total no of concurrent chats you want to assign to that agent, the agent's first and last name, designation and contact no. After that click on the 'Submit' button



4. Chat Conversation:

In the conversation box agent can directly engage with visitor. Each message is accompanied by the name of the person who sent that message and a timestamp so you can easily follow the conversation.



4.1 Engaged Visitors:

In the top left side corner of the panel Chat operator can see all of his on-going chats.

4.2 Online Agents:

Chat operator can chat with other operators from the same Chat Window. At the left corner there is a menu called Online Agents. In that menu all the logged in operators name will be shown. By clicking one operator name you can start conversation with him.

4.3 New Chat Request:

Agents can see new chat requests from website visitors on the left side corner of their dashboard.

4.4 Chat Panel:

The central position is for running conversation. Agent will type from the messaging field and also share file by clicking attachment file. There are some other fields in the chat panel.

4.4.1 **History**:

Agent can see all the previous chat conversations of that particular visitors.

4.4.2 **Chat Transfer:**

Agent can easily transfer a chat to other agent. This transfer chat option is available in the chat window itself. Agent can click on it and select to whom he wants to transfer the chat.

The new chat agent can take over the current live chat conversation without breaking the chat session

4.4.3 Visitor Info:

Agent can see real time visitor information. It enables you to track the website visitor's country, city, appropriate location, IP address, ISP (Internet Service Provider), total time spent in your website, and referral website

4.4.4 Map:

During the chat session chat operator can see the visitor real time location map.

4.5 Online Visitors:

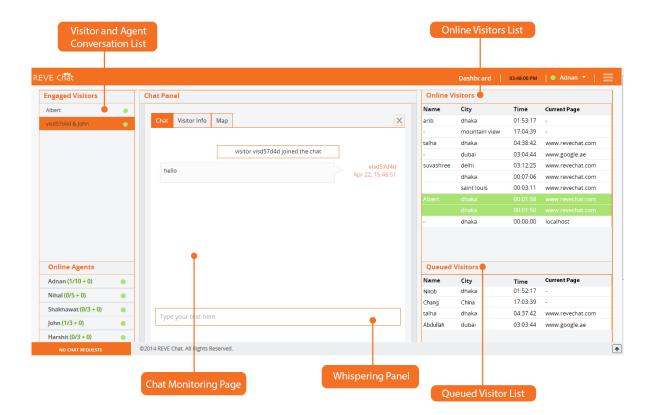
In the online visitor list agent can see all the web visitors who are currently viewing your websites. You can see their current viewing page, city name and visiting time. Besides you can also send a proactive chat request to the visitor to know whether they need any sort of help or not.

4.6 Queued Visitor:

Queued Visitor list will show who is the visitors is waiting for Live Chat. It gives information to your website visitors regarding their waiting time in chat queue and sets accurate response time expectations.

4.7 Monitoring Panel:

Admin can monitor which agents are chatting and the detailed chat conversations between your website visitors and agents in real-time. Admin can also whisper the agent if they give any wrong information. Here you can monitor the chat conversation between agents and website visitors and among your agents.



5. Reporting and Analysis

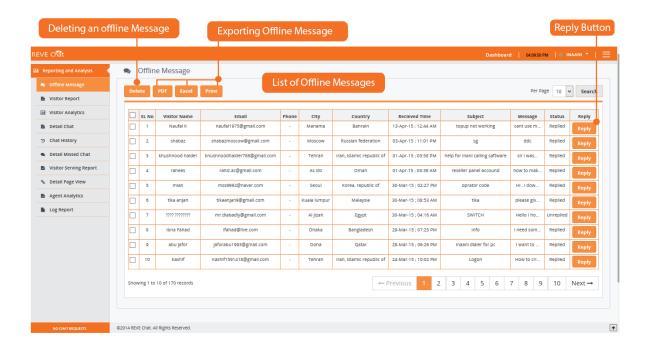
Reporting and analytics includes detailed reporting and analytics that measure several aspects like the total amount of time spent by your website visitor on each chat, the overall activity of your agents, conversion tracking, track of transcript reports, monitoring chat history and many more.

5.1 Offline Message

When all of your agents are offline, if one of your website visitor clicks on the chat button for initiating a live chat, will get an offline pre-chat form where he/she needs to enter details like name, email address and the message. Once one of your agent comes online he will get the message and can reply to the given email address of that website visitor.

- For the setting of offline message please follow the below mentioned steps:
- Login to your REVE Chat Dashboard
- Select 'Offline Message under 'Reporting & Analysis'
- You will see the list of offline messages. In the table you will see name, email address, country, city, received time, subject, status and the offline message of that visitor.
- Click on the 'Reply' button to response to the offline message.

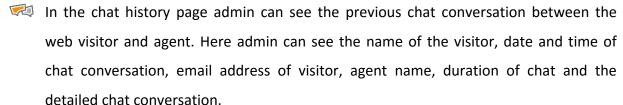
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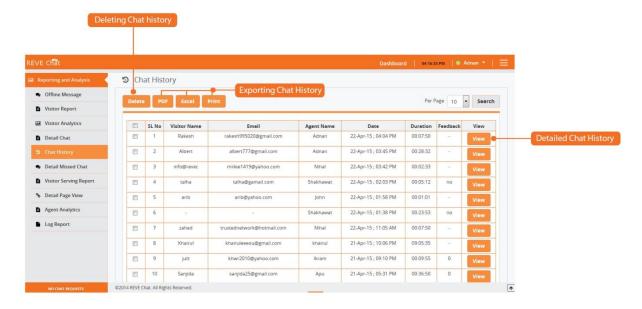


5.2 Visitor Report:

In the visitor report you can see all the visitors who have visited your site. You can see their email address, number of visits, number of page view, Visit time, time spend, city, country, and the referral site.

5.3 Chat History:





5.4 Visitor Analytics

This special feature enables you to see your website traffic. For using this facility please follow the below mentioned steps:

- Login to your REVE Chat Dashboard
- Select 'Visitor Analytics' under 'Reporting & Analysis'
- Then you will see the visitor analytics graph
- Here you can see total visits, page views and unique visits in hourly, daily, weekly and monthly basis.

5.5 Visitor Serving Report

Visitor Serving Report enables you to know the total no of chats, each and every agent of yours attended. To use this facility please follow the below mentioned steps:

- Login to your REVE Chat Dashboard
- Select 'Visitor Serving Report' under 'Reporting & Analysis'
- Here you can see the total number of chat for each and every agent
- You can get report per agent wise and per date wise.

6. Payment and Billing

REVE Chat offers three price packages and 14 days of free trial. The three price pages are:

- i) Basic
- ii) Standard
- iii) Advanced

For using REVE Chat, you need to sign up first for the free trial. After that you can opt for any of the price packages we offer. The payment and billing process is very easy for which you need to follow the below mentioned easy steps.

- Log in to your REVE Chat dashboard.
- Select 'My Plan' under 'Billing' section.
- Here you can the feature list under our three different price packages.
- To upgrade your REVE Chat plan you need to fill up the 'Modify Your Package' form
- Here in this form, you need to select which package you want to opt, total number of agents you want, billing period, payable amount and billing currency.
- If you want to change anything then click on the 'Reset' button or else click on the 'Next' button.
- After that you will be redirected to a new page where you can check the detailed subscription invoice. If you want to change something click on the 'Back to Previous' button or else click on the 'Check Out' button for payment.
- After that you will be redirected to the payment gateway where you need to fill up a form with details like your name, email address, address, state, credit card and debit card details. After that click on the 'Continue' button to finish your transaction.

My Plan Advanced Present Plan: No. of Agent: Balance: 0.00 USD 11-Oct-14 Subscription started: Subscription ends: 11-Oct-15 Feature Description Basic Standard 15 USD/Month/Agent Real-time Visitor Info Visitor Visualization Chat History 14 Days Unlimited Unlimited Website Integration Unlimited Unlimited Concurrent Chat Unlimited Unlimited Proactive Chat × Offline Chat Missed Chat Information × ~ Queuing Chat Transfer Agent Ratings Limited Widget Customization × Email Chat Transcript Print Chat Transcript 256 bit SSL Encryption Basic Reporting Geographical Visitor Identification Support via Email 8x5 8x5 Limited Support via Email Limited Support Over Phone Account Manager Support × Unlimited Unlimited Number of Agent Chat Supervision/Monitoring × × Click To Call File Transfer Modify Your Package **Price Preview** Package Advanced 25 USD Monthly rate per agent No of agent Total Agents 12 month Subscription period Total Amount 600 USD Billing Period 12 month (10% off) Discount for 12 Month 60 USD Subscription Payable Amount Net Amount 540 USD Previous Balance 0 USD Billing Currency USD Payable Amount 540 USD We Accept PayPall



6.1 Billing History

In the billing history page admin can see the previous success and failed invoices, date and the amount of subscription package.



7. Setting and Configuration

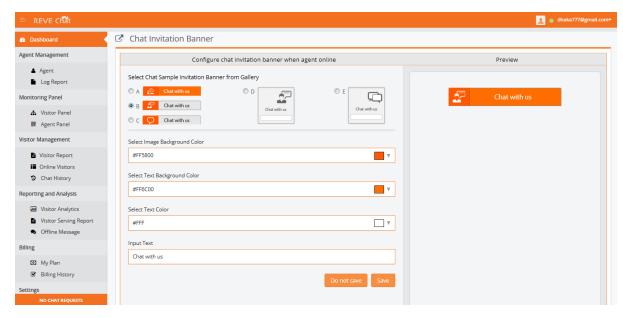
REVE Chat is easily configurable as per your choice. You can easily customize it to match with the look and feel of your website.

7.1 Configuration of Chat Invitation Banner

For the setting and configuration of your chat invitation banner please follow the below mentioned steps.

- Login into your REVE Chat dashboard
- Select' Chat Invitation Banner' under 'Settings'
- Here you will get 5 chat invitation banner options to choose from
- You can select image background colour
- You can select text background colour
- You can select the text colour
- You can give proper message for example 'Chat with us' as per your choice
- Finally click on the 'Save' button to save your changes

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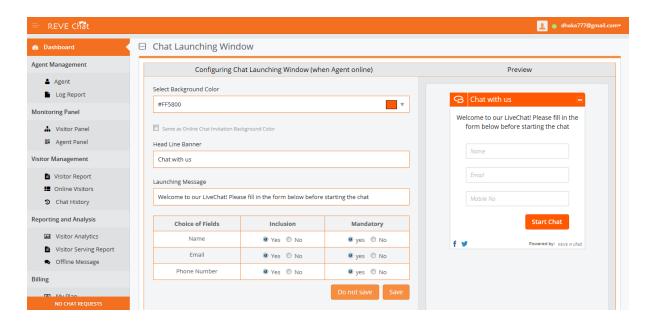




7.2 Configuration of Chat Launching Window

To configure the chat launching window please follow the below mentioned steps:

- Sign in to your REVE Chat dashboard
- Click on 'Chat Launching Window' under 'Settings' option
- Here you can select the background colour of your chat window as per your choice.
- You can give header line banner as per your choice for example' Chat with us'
- You can put chat launching message as per your choice for example, 'Welcome to our LiveChat! Please fill in the form below before starting the chat'.
- For initiating a chat you can make your website visitor to fill up a form with his name, email address and phone number. It's up to you whether you want it to be mandatory or not. Finally click on the 'Save' button to save your changes.



7.3 Configuration of Chat Window

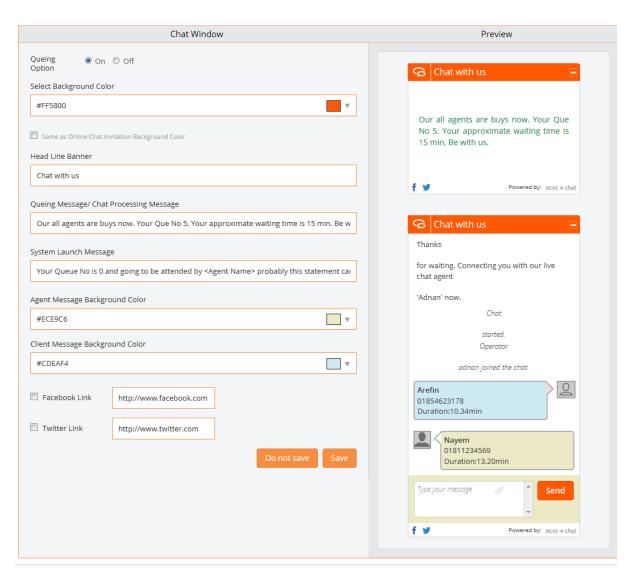
You can customize the REVE Chat window as per your choice. To customize it please follow the below mentioned steps:

- Sign in to your REVE Chat dashboard
- Select 'Chat Window' under 'Settings' option
- You can enable or disable the 'Queuing Option' as per your requirement.
- You can select the background colour of your chat window
- You can give head line banner as per your choice, for example 'Chat with us'

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In case if you enable the 'Queuing Option', you can give the 'Queuing Message/ Chat Processing Message' as per your choice. For example 'All of our agents are busy now. You are in Queue no 5. Your approximate waiting time is 15 minutes. Please bear with us. We will be happy to help you.'

- You can give 'System Launch Message' as per your choice.
- You can change the agent message background colour
- You can change the client message background colour
- You can also provide the Facebook and Twitter page links of your company in the chat window
- Finally click on the 'Save' button to save your changes

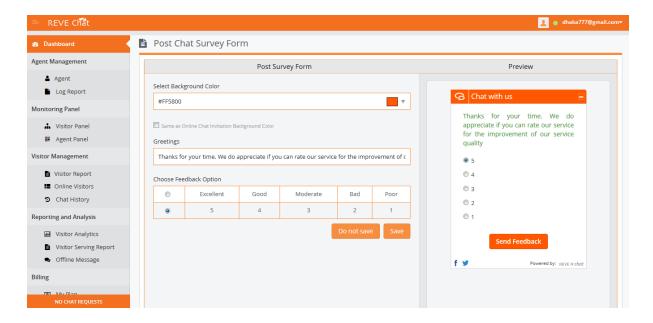


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7.4 Configuration of Post Chat Survey Form

You can customize post-chat survey form for getting customer feedback after each and every chat support which will help you to improve your support service. For managing this post chat survey form please follow the below mentioned steps:

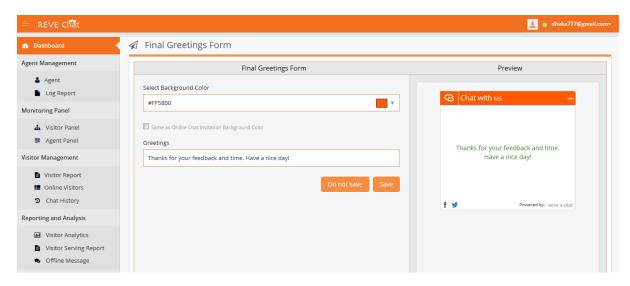
- Sign in to your REVE Chat dashboard
- Select 'Post Chat Survey Form' under 'Settings'
- Here you can select the background colour as per your choice
- Here you can provide greetings as per your choice. For example, 'Thanks for your time. We do appreciate if you can rate our service for the improvement of our service quality.'
- There are two options of giving feedback to choose from.
- Click on the 'Save' button to save your changes.



7.5 Configuration of Final Greeting form

You can customize final greeting form as per your choice. To customize it please follow the below mentioned steps:

- You can select the background colour of the final greeting form
- You can give the greeting message as per your choice. For example, 'Thanks for your feedback and time. Have a nice day!'
- Click on the 'Save' button to save the changes



8. Guide for live chat operators

8.1 Operator status and staying online:

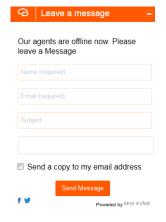
When you login to the dashboard and you set your status to Online. This means that, whenever there is a customer willing to chat, you can receive that chat.

When an operator set status to Offline then Operators will not receive any chats request.

Notes: Operator status is very important, here's why: every time you change your status, you virtually change, to some degree, your chat's availability. Only with the online status you will be able to receive new chats. This means that whenever you are on Offline you may miss potential chats and customers.

8.2 Offline mode:

Whenever a customer comes to your chat and you are not available, an offline message will be displayed and the client will be able to leave you an offline message.



8.3 Guide for operator:

After you get yourself familiar with the Chat window, it is time for your first chat! There are a few things worth remembering when handling the very first customer and customers in general:

- Be prepared, both in terms of your ability to answer as soon as the customer asks and in terms of your product knowledge.
- Stay focused and provides simple answers in order to solve your customer's case as soon as possible.
- Don't panic if something goes wrong. We're human after all! If you make a mistake, simply apologize and proceed to solve the case.
- Keeping these three points in mind should get you successfully through your first chats.

 There's one more valuable piece of advice that you should keep in mind.

9. <u>FAQ</u>

9.1 I am unable to login. Please help.

Please check whether you have entered correct username and password or not. If you are still unable to login to your dashboard please click on the 'Forgot Password' option and follow the below mentioned steps.

- Go to Login page
- Click on the 'Forgot Password' option
- Enter your email address
- Click on submit button
- The verification code will be sent in your registered email ID
- You need to enter the verification code in the given place
- You will be redirected to a separate page where you need to enter your new password
- Click on the 'Submit' button and your password is reset

Please type your email address.We send you a link to change the password.

Login

Email

*Sign up to get a free trial of REVE Chat

REVE Chat helps you to boost customer satisfaction, build customer loyalty and increase sales conversation.

9.2 How do I initiate the chat with my website visitors?

There are two ways of initiating the chat with your website visitors.

- Agent invite: Here in the chat panel agent can see how many visitors are present in the website at a specific time. From there he can click on a name from the list and a chat request will be sent to the visitor.
- Visitor invite: After clicking on the chat button, for initiating the chat, the visitor needs to fill up a pre chat form. After that a chat request will be sent to the agent. The agent can see the request in the left side corner of his dash board. The agent needs to accept the request to initiate the chat.

9.3 How does REVE Chat work after working hours or what happen if all the agents are not in online?

When you are logged out from the dash board, REVE Chat switches to offline mode. During this time if one of your website visitor clicks on the chat button for initiating a live chat, will get an offline pre-chat form where he/she needs to enter details like name, email address and the message. Once one of your agent logs in to the dashboard and comes online he will get the message and can reply to the given email address of that website visitor.

9.4 Can I customize the REVE Chat window?

Yes, REVE Chat window is customizable. Some of the things which you can change in the chat window include:

Changing the colour scheme

Changing the font size

Chat Widget text

Offline Widget Text

Prechat & Post chat form

9.5 After signing up for REVE Chat, where do I paste the REVE Chat code in my website?

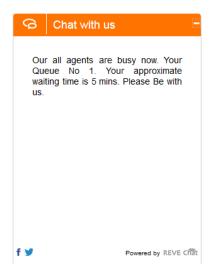
You need to paste the REVE Chat code just before the closing head tag of your website page code (specific website html)

9.6 Can the chats be transferred?

Yes, you can transfer chat to other agents. This transfer chat option is available in the chat window itself. Agent can click on it and select to whom he wants to transfer the chat. The new chat agent can take over the current live chat conversation without breaking the chat session.

9.7 How can I manage the simultaneous chat sessions?

Agents can see new chat requests from website visitors on the left side corner of their dashboard. Then after accepting the chat requests the visitor list will appear on the left part of the chat panel. From there he can select and start chatting simultaneously with the visitors. Here Admin can manage their agents. For example any agent can chat with as many website visitors as he wants but if the admin restricts him to only five chats then at the same time that agent simultaneously can chat with maximum 5 visitors. Meanwhile if that agent receives any extra chat request then it will show in the queue no 1. This is Customizable message.



9.8 How can I upgrade/downgrade my subscription package?

You can upgrade your subscription package at any time. In contrast down gradation of your current subscription package is not possible in between your billing cycle. Only after completing the monthly billing cycle of your current subscription package, you can downgrade your package as per your requirements.

You can upgrade your subscription package by following the below mentioned steps:

- Login to your dashboard
- Click on 'My Plan' under the 'Billing' section from the left side menu of your dashboard
- Under 'Modify Your Package' select your package, number of agents, billing period, payable amount and billing currency and click in the 'Next' button
- You will be redirected to a page where you will see the detailed invoice
- Check the detailed invoice and if everything is ok, click on the 'Checkout' button
- Now enter your preferred mode of payment and all the required details and click on the 'Continue' button

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