Version	**:**	3.1.1.24
Revision	**:**	4
Website	**:**	www.kayako.com
Forums	**:**	http://forums.kayako.com
Support	**:**	http://support.kayako.com
Editorial	**:**	docs@kayako.com

Kayako LiveResponse

Client Application User Manual

About this manual

This version of the manual can be used as a guide for many other proceeding and proceeding versions of Kayako LiveResponse Client Application. However, please note that feature discrepancies may exist between versions.

We publish a new and up to date manual upon the release of each stable build. For accuracy, be sure to use the manual(s) bundled with your downloaded SupportSuite package.

If you would like to send in a suggestion or report any errors in this manual, please send an e-mail to docs@kayako.com or post in the documentation forum - your input is very much appreciated. Please do **not** use this address for support.

You can obtain further support for any of Kayako's products via:

- **Support desk** – www.kayako.com/support
- **Community forums** – http://forums.kayako.com

Contents

Introduction to Kayako LiveResponse Client Application

Kayako LiveResponse Client Application is an application for Windows® (*Microsoft® Corporation*) that communicates with your installation of **SupportSuite** or **LiveResponse**; monitoring for user activity, chat requests and also provides a seamless interface to your support desk.

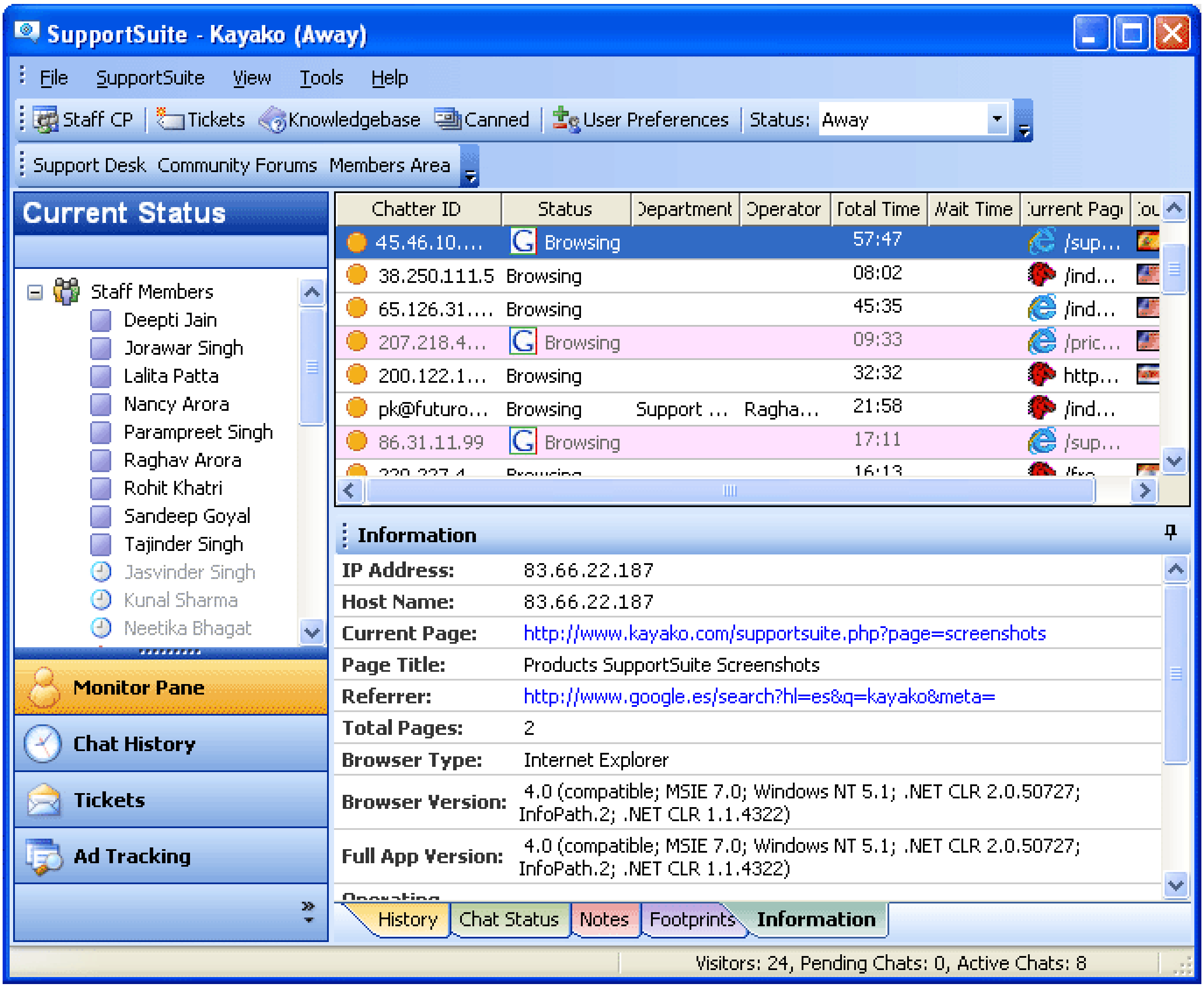
The Client Application can be configured to alert you in a variety of ways, including:

- Alerting you of new chat requests.
- Alerting you of new visitors to your site, or areas of your site.

If **Kayako InstaAlert** is installed, InstaAlert can be configured that when clicking on ticket notifications, the ticket is opened within the **Client Application** interface rather than in a web browser window.

The Client Application is not licensed per machine, one purchasing a SupportSuite or LiveResponse license, you are free to download unlimited copies of the application and distribute them to your support desk staff users.

Client Application feature list



Above: Kayako LiveResponse Client Application – showing two visitors browsing areas of your support desk installation.

- Users use their SupportSuite or LiveResponse login information with the Client Application.
  - Users can only handle and respond to chat requests made to the department they are assigned, unless a chat is transferred to an individual.
- Chat live with your website visitors.
- Conference chat with a website visitor – more than one staff user may participate in a chat with a visitor.
- Accurate, on-the-fly spell checking of your messages.
- Application can be minimized and controlled via the system tray.
- Notification methods can be customized using:

  - Animated icons.
  - Pop-up notifications.
  - Sounds.
  - Staff status changes.
- To alert you to a chat request or a new visitor.

- Proactive and forced chatting options allow you to proactively communicate with website visitors.

- Manage notes and chat histories for site visitors.

- View a visitor's foot prints and where they were referred from in real time.

- Log in to your support desk seamlessly, and manage tickets and all SupportSuite or LiveResponse related functions seamlessly, from within the Client application.

- Staff users can have an online, offline, away, busy or be back shortly status.

- Use ViewShare functionality to demonstrate to your visitors from your own desktop, all through the visitor's web browser.

- Use hot-keys to quickly control your support desk operations and manage multiple chat sessions at any one time.

- Canned messages (predefined responses) to speed up communication, resolution and closure of an issue with your visitors.

- Supports multiple languages.

- Ability to connect via a network proxy.

- Automatic program start and login options available.

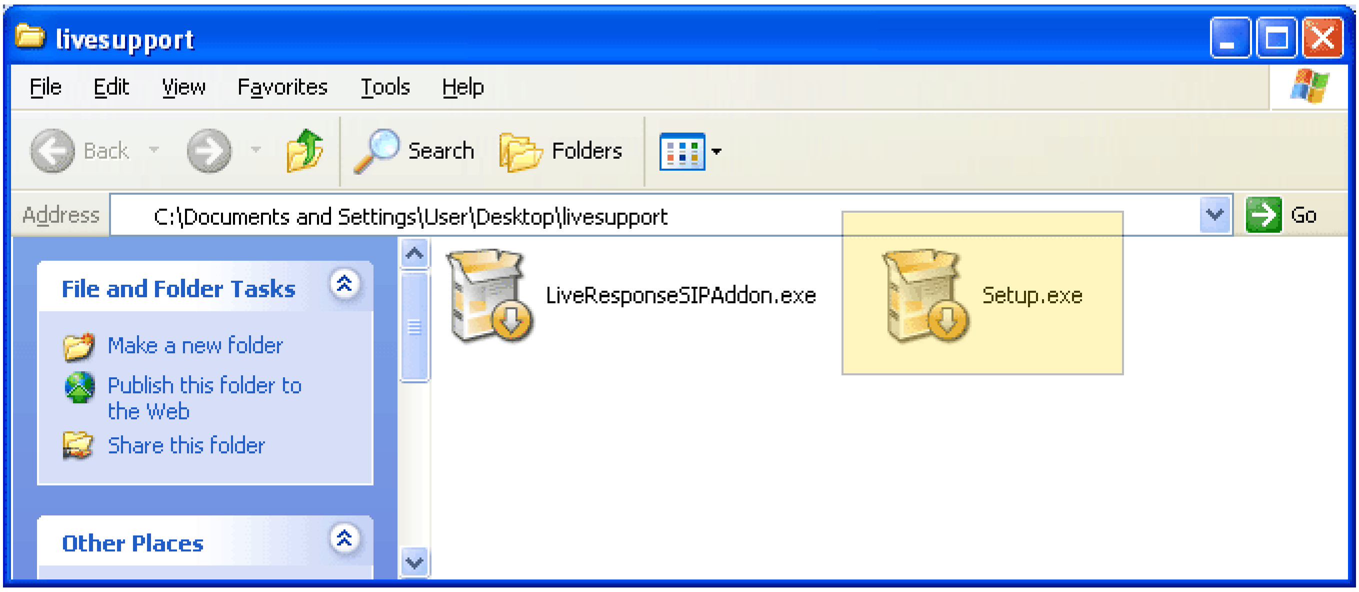
- Visitor tracking across your support desk or any other of your web pages that have been tagged with a visitor tracking JavaScript snippet.

Downloading the Client Application

Locating the setup files

This Client Application setup files can be found in the archive of **eSupport** or **SupportSuite** that is available for download from the member's area (http://members.kayako.net), as shown below.

The Client Application setup files will be found in the folder **\livesupport** of the **.tar.gz** archive, as shown below.



Getting the latest version

The latest stable version of the Client Application can be downloaded from http://hotfix.kayako.net. It is recommended you download a copy from this location, so that you can be sure you have the most up-to-date release.

Interface quick reference

The interface quick-reference is a visual FAQ (frequently asked question) guide to the most common interfaces of the **LiveResponse Client Application**.

Main interface

Chat window

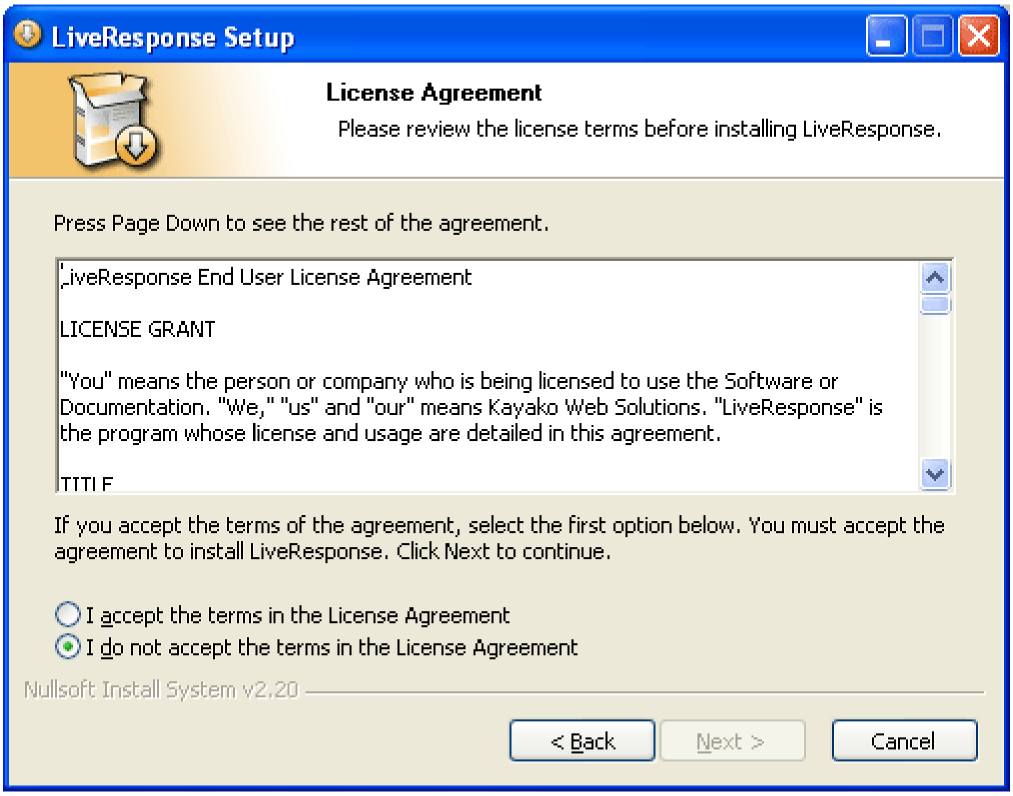
Installation guide

Step one

After downloading the latest version of the Client Application software, run **Setup.exe**. This will begin the installation procedure, as shown below.

Click on the **Next** button to continue.

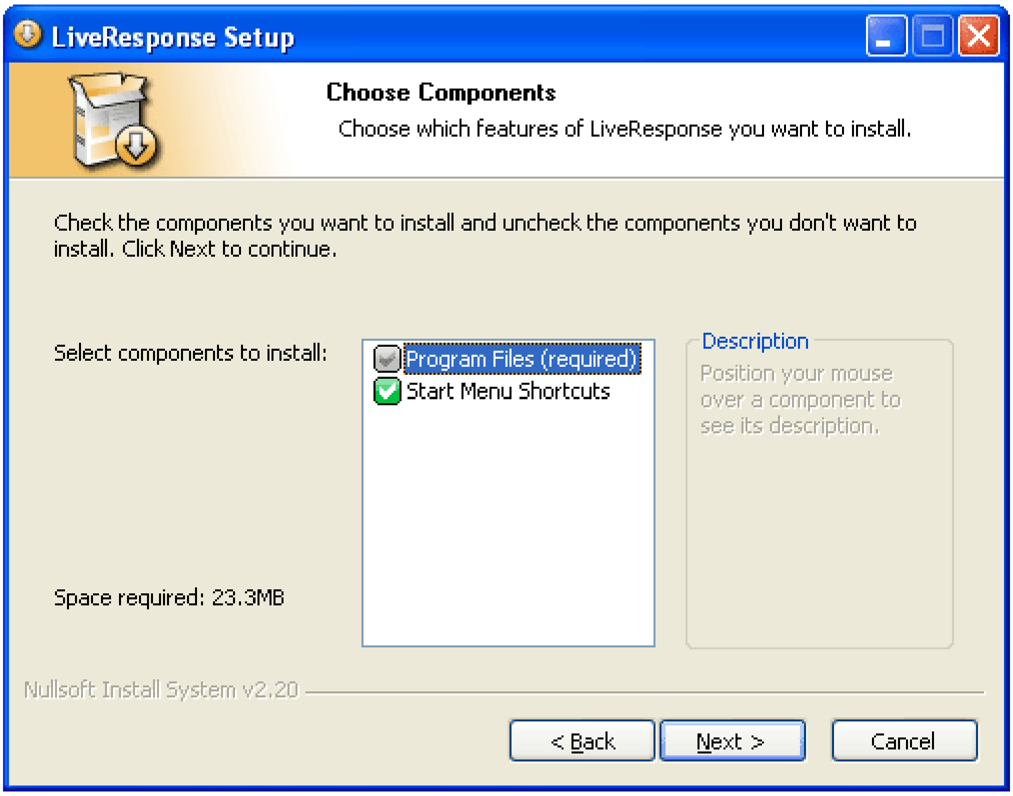
Step two: License agreement



Review the license agreement and accept the terms as appropriate.

Click on the **Next** button to continue.

Step three: Component selection



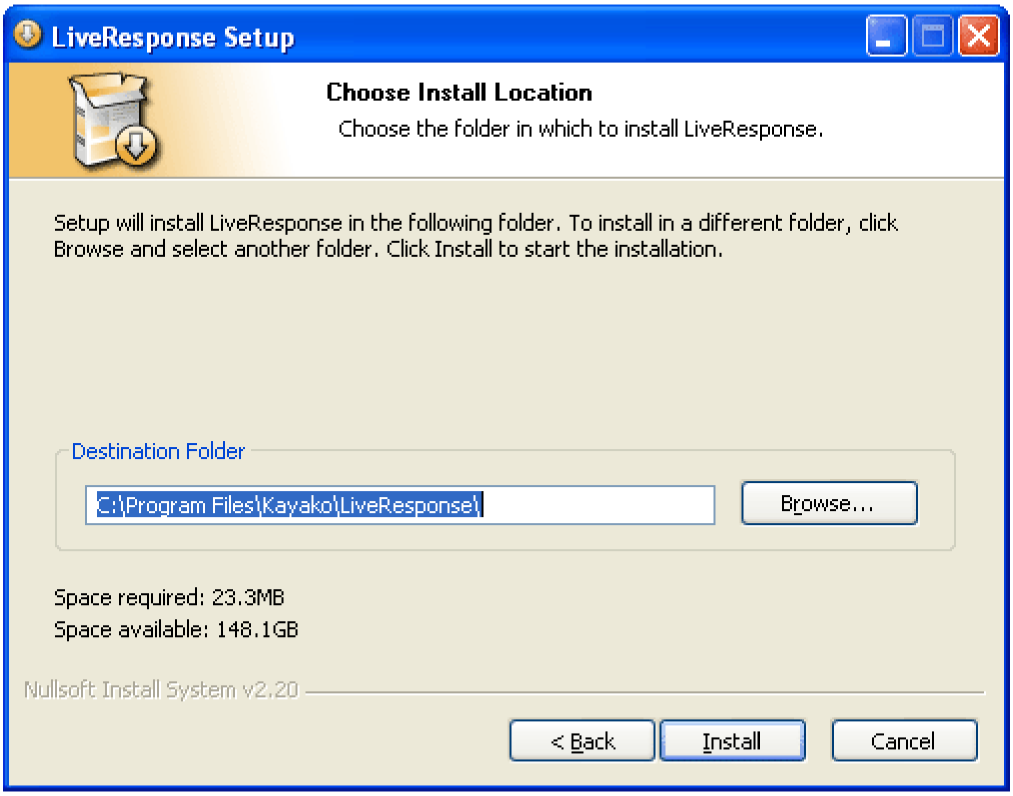
Configure the installation options as appropriate.

- **Program Files** – this option is required for the installation of the Client Application. The Program Files consist of the core files needed for InstaAlert to function.

- **Start Menu Shortcuts** – this is optional. Enabling this option will install a shortcut to the Client Application program in the Start Menu.

Click on the **Next** button to continue.

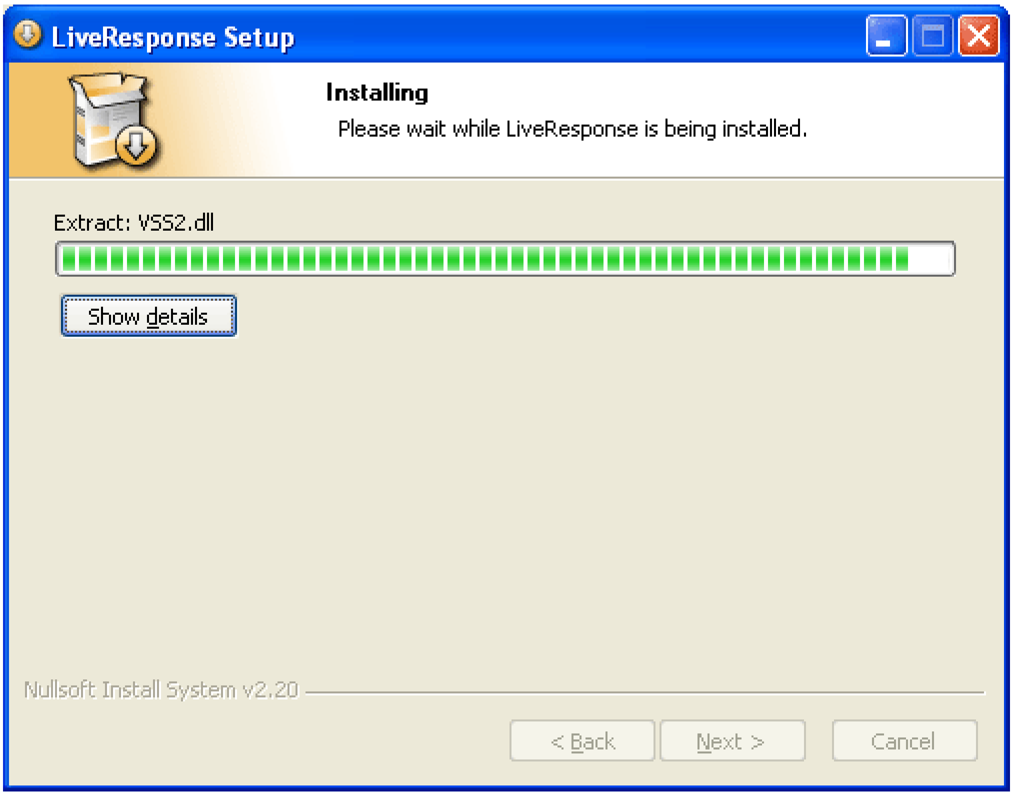
Step four: Installation location



- **Destination Folder** – the location within the file system where the Client Application program files are to be installed.

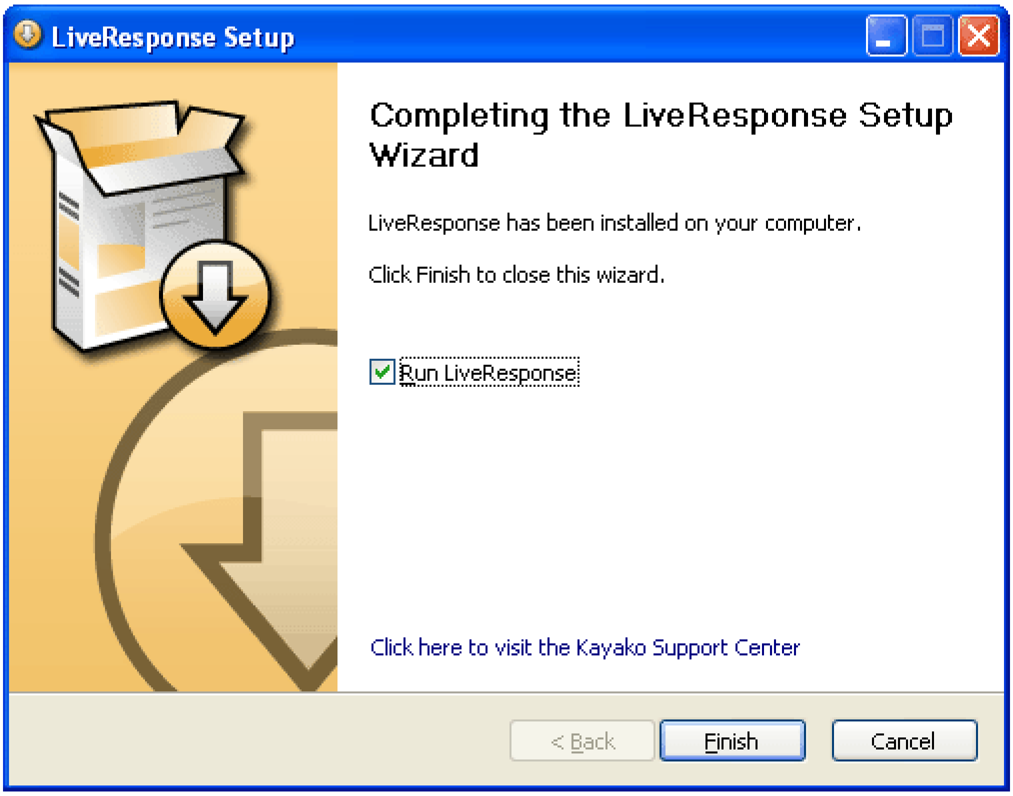
It is recommended you leave the Destination Folder setting as what is given as default – normally within the **'Program Files'** folder.

Click on the **Install** to proceed with the installation. The Client Application program files will now be installed onto the system and configured. This process is automatic, and you will see window activity as shown below.


LiveResponse Setup
Installing
Please wait while LiveResponse is being installed.
Extract: VSS2.dll
Show details
Nullsoft Install System v2.20
< Back
Next >
Cancel

Step five: Completion

After the automatic installation procedure has taken place, you will be presented with the following finishing screen.



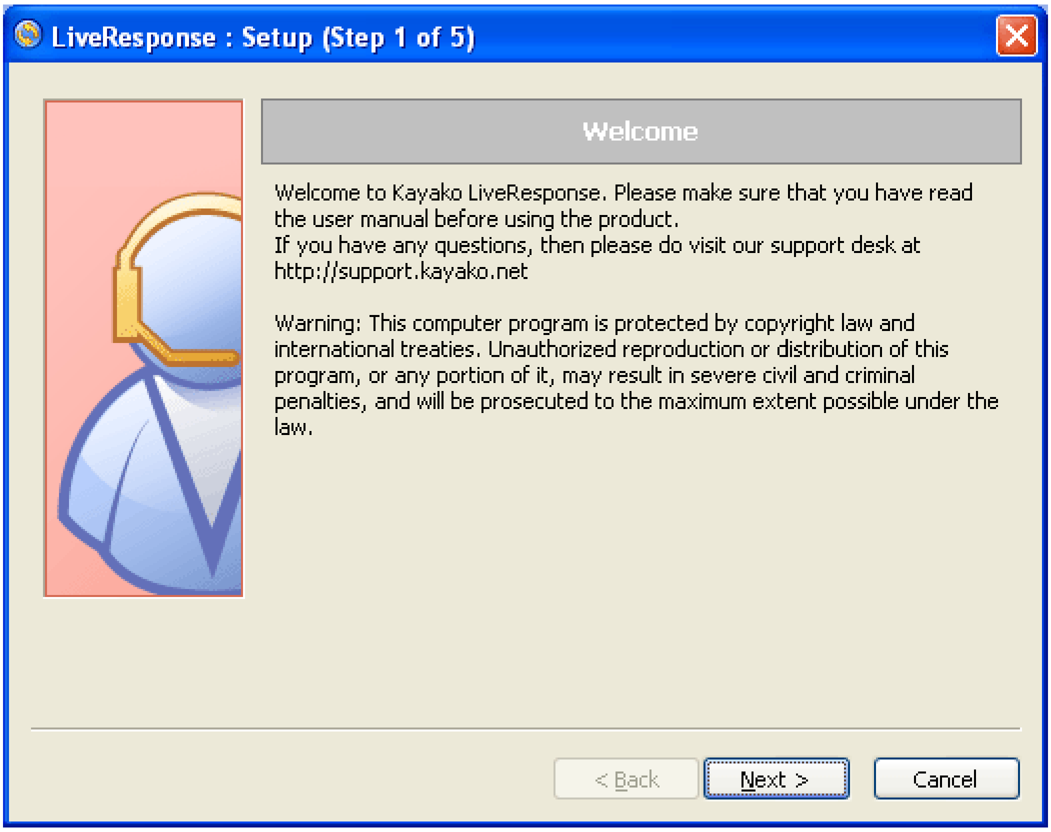
The installation is now complete. Leaving the **Run LiveResponse** box ticked will launch the Client Application immediately after you have pressed the **Finish** button.

Click on the **Finish** button to finishing the installation and close this window.

First-time configuration guide

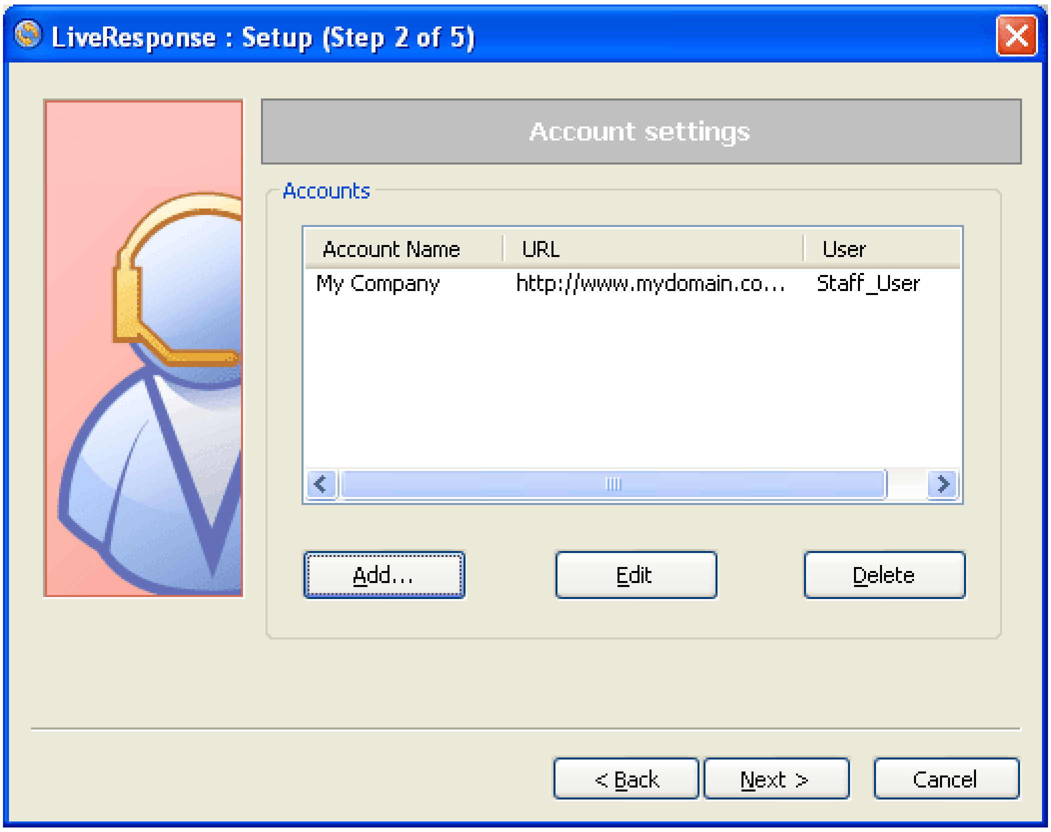
The first-time configuration process is a procedure that you are taken through following the first run of the Client Application. The wizard will take you through the basic configurations required to get the application up and running.

Step one: Copyright notice



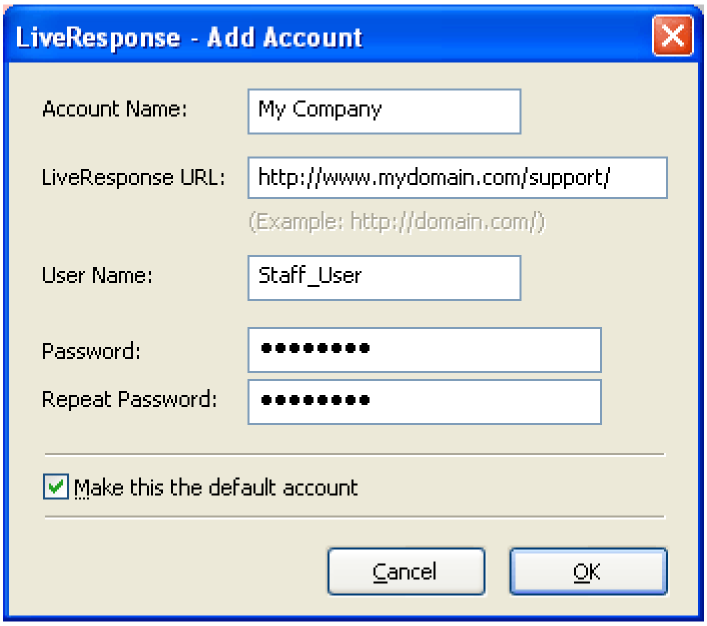
Review the copyright notice and click on the **Next** button to continue.

Step two: Account settings



To connect the Client Application to your SupportSuite or LiveResponse installation, you must enter its location and your staff user account information.

Click on the **Add** button to add a new account using the window shown below.

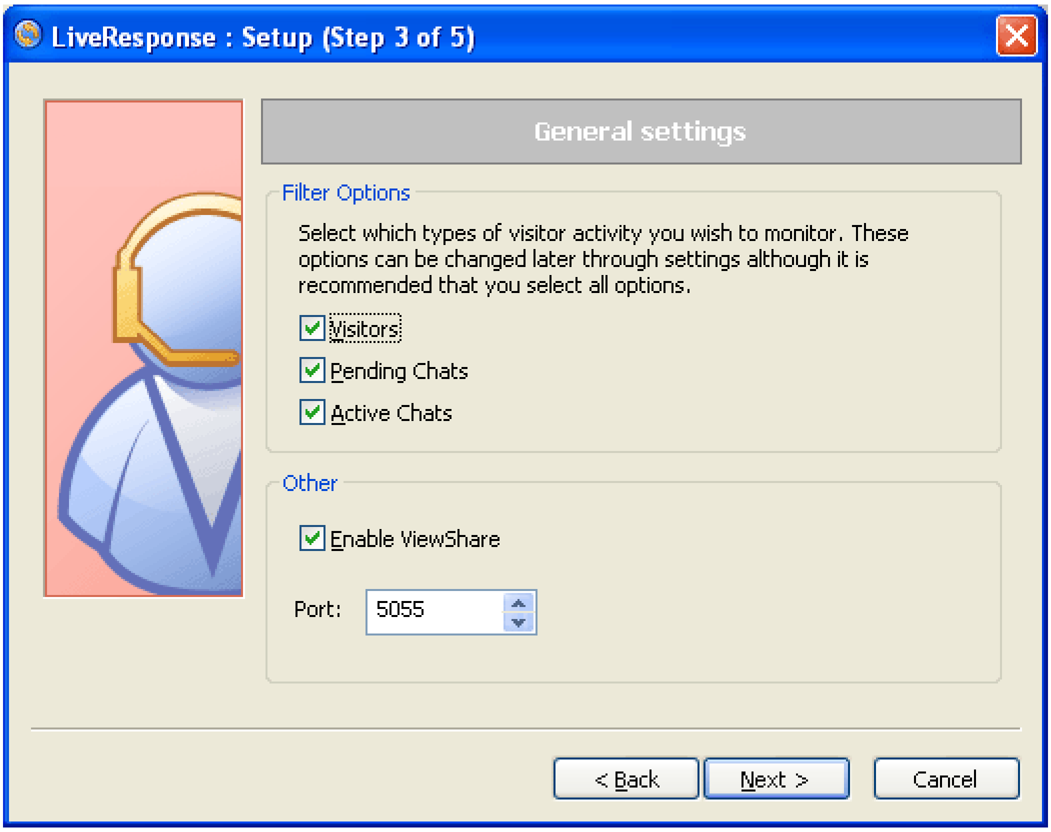


- **Account Name** – reference name for this account.
- **LiveResponse URL** – the URL of your SupportSuite or LiveResponse installation.
- **User Name** – your staff user account username.
- **Password** – your staff user account password.
- **Repeat Password** – confirm your entry.
- **Make this the default account** – if enabled, this account will become the default account, which will be logged into automatically when starting LiveResponse (if configured later).

Click on the **OK** button to add the account.

The Client Application can store the account details of more than one SupportSuite or LiveResponse installation. If you wish to add more account details, enter them now. If not, click on the **Next** button to continue.

Step three: General settings



Filter Options

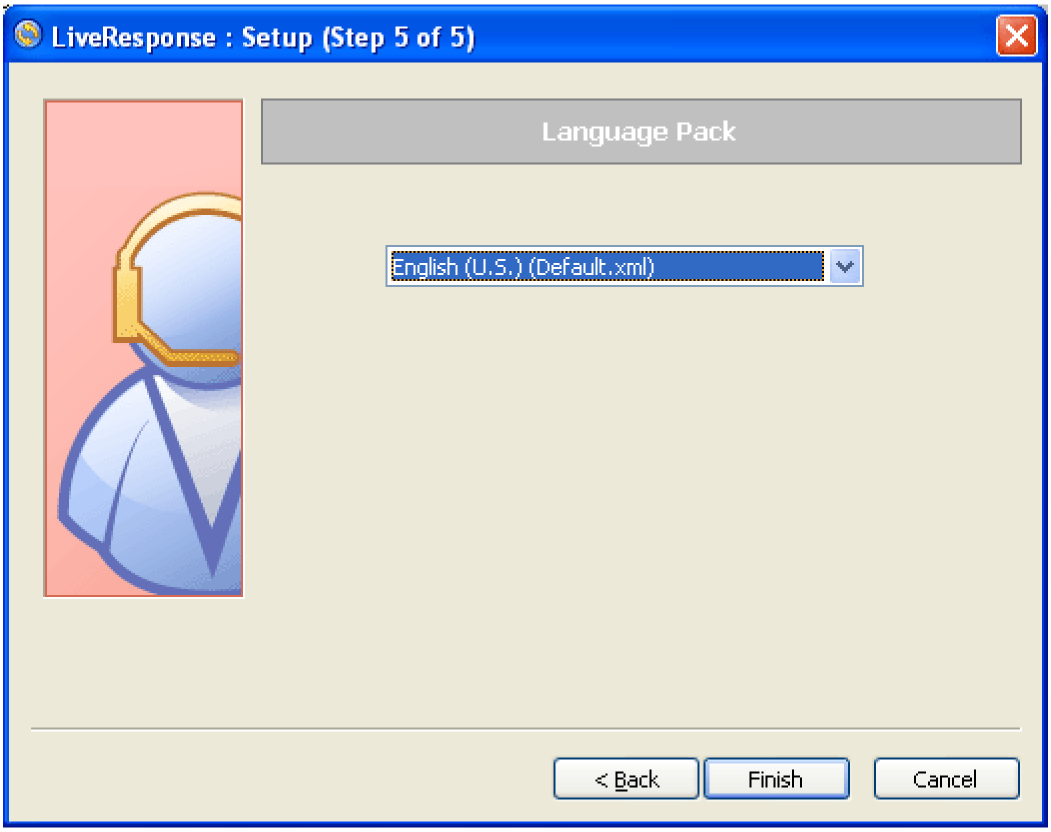
- **Visitors** – if enabled, visitors to your site (or any of your web pages that you have added a visitor tracking button or live chat button to) will be listed in the monitor pane.
- **Pending Chats** – if enabled, visitors who are requesting a chat session will be listed in the monitor pane.
- **Active Chats -** if enabled, visitors who currently in a chat session with a staff will be listed in the monitor pane.

Other

- **Enable ViewShare** – if enabled, the ViewShare functionality of the Client Application will be activated. For more information on ViewShare, see ViewShare.
- **Port** – the port to which visitors will connect to view your ViewShare session.

Click on the **Next** button to continue.

Step four: Language



Which language pack the Client Application will use is configured here.

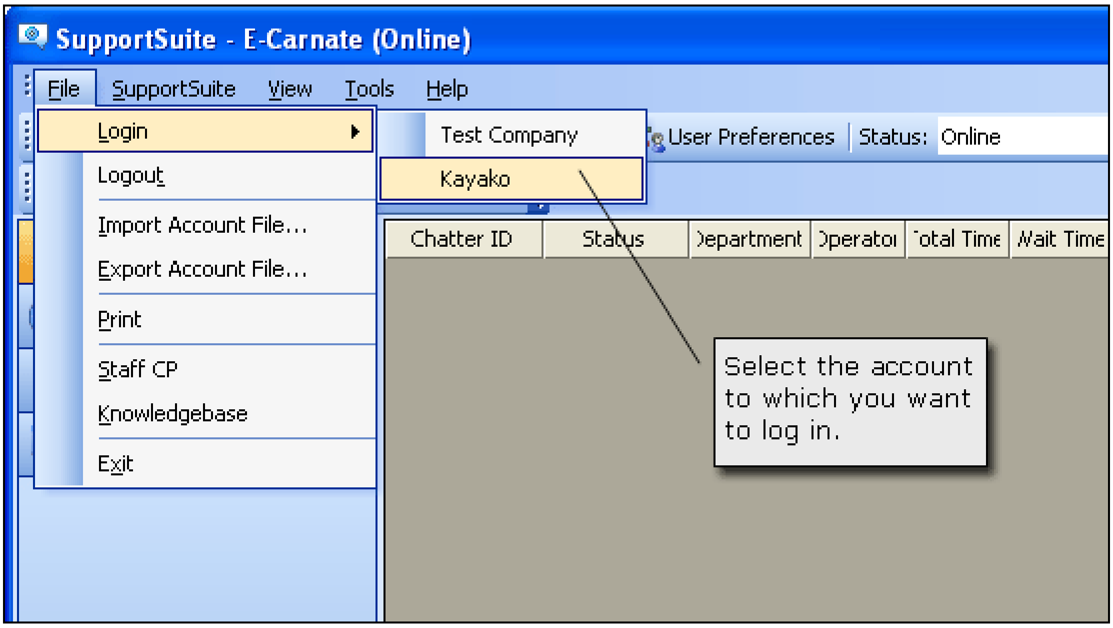
By default, the only language pack for the application bundled with the installation files is the default **English (U.S.)** language file.

Click on the **Finish** button to complete the configuration and start using the Client Application.

Logging into the server

To log in to an account:

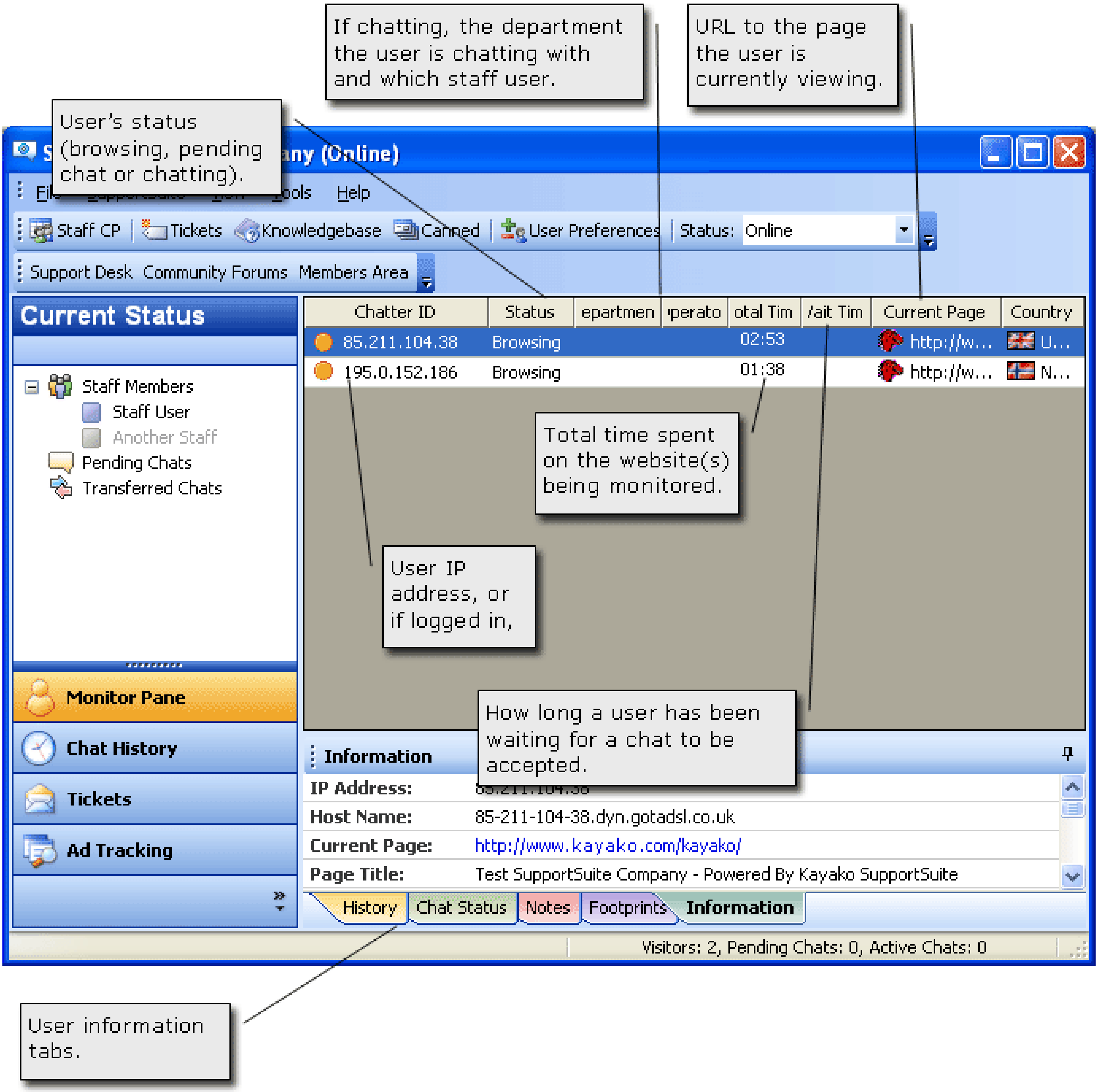
1. Open on the File menu.
2. Hover over the Login menu.
3. Click on the account to which you want to log in, as shown below.



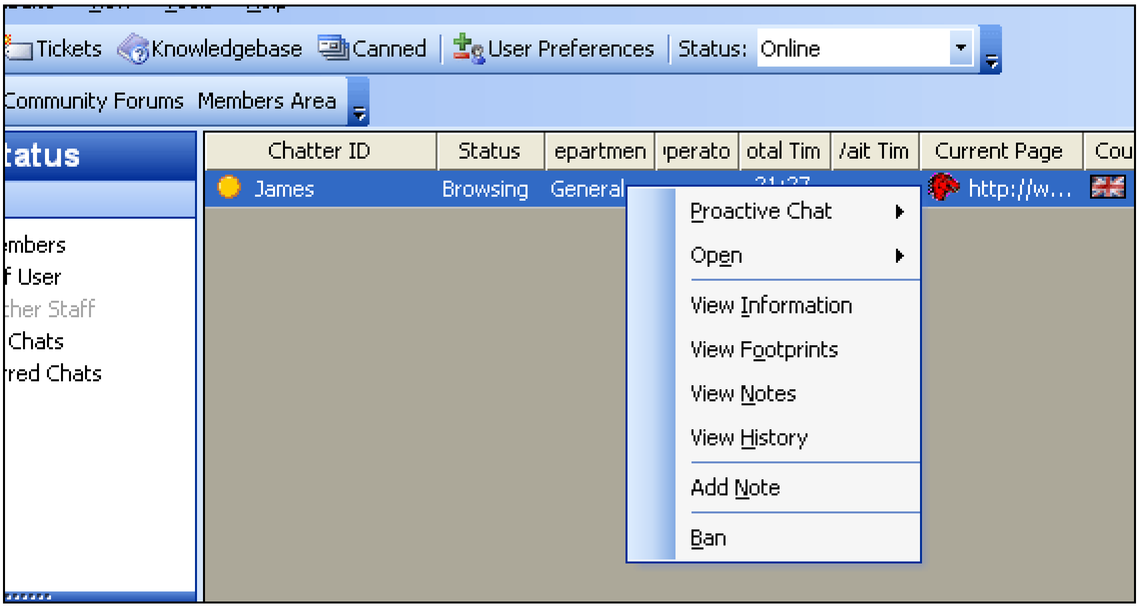
View panes

Monitor pane

The monitor pane lists all visitors who are viewing web pages that have the visitor tracking JavaScript coded in. The visitor's IP address (and username if logged in or present in a chat), browsing time, country and current web page are viewable here. This, along with the department and operator (if the visitor is in a chat session).



Right-clicking a visitor in this list will open an action menu, as shown below.

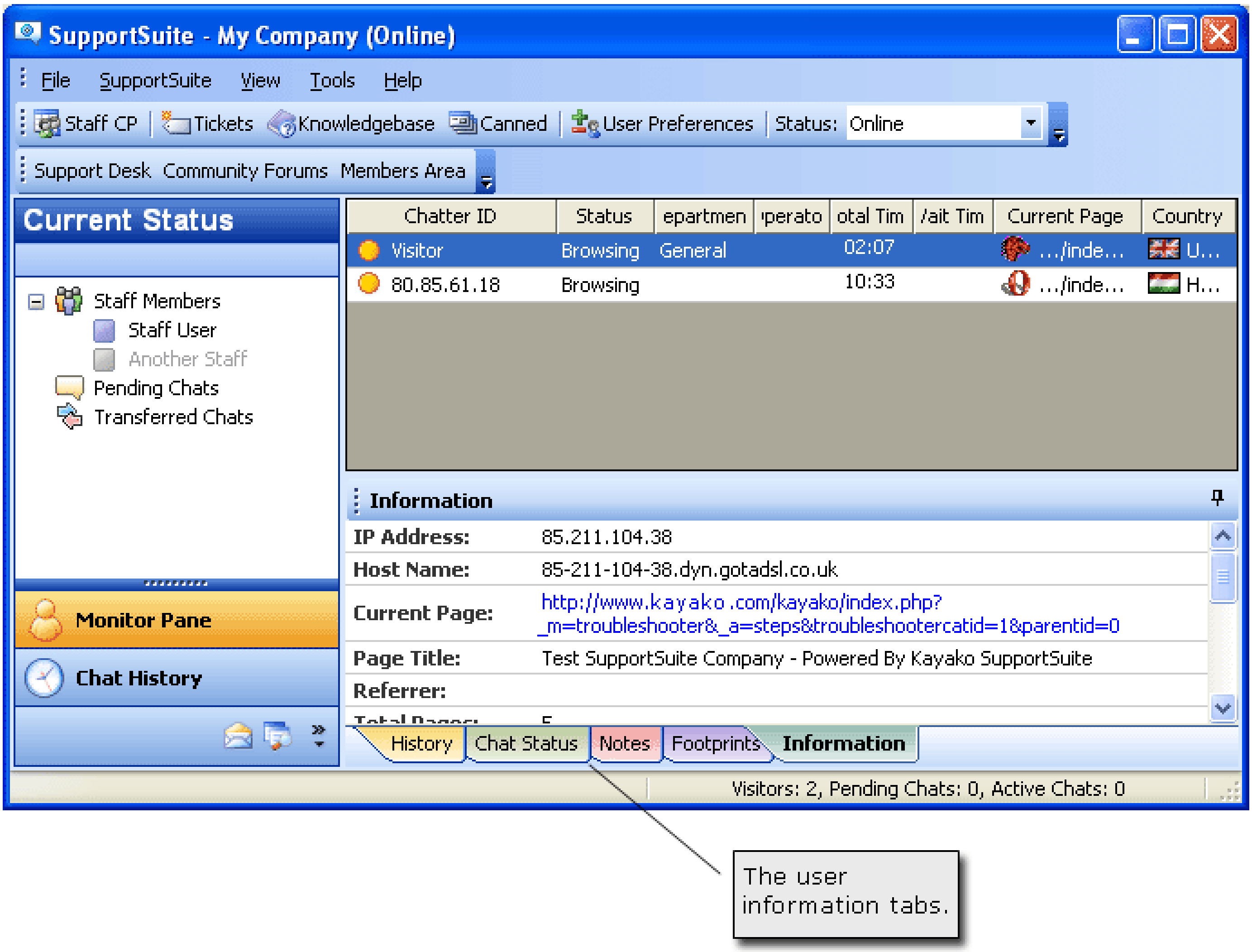


- **Proactive Chat** – allows you to proactively request or force a chat with a visitor. For more information on proactive chat requests, see proactive chat request.
- **Open** – allows you to open the **current page** the visitor is browsing, or the page the visitor was **referred from**.
- **View Information –** view more information about the visitor (opens the **Information** tab on the **visitor information tabs** bar.
- **View Footprints** – view the footprints left by the visitor's browsing of your web pages (browsing history).
- **View Notes** – view notes attached to this visitor's IP address, left by other staff users.
- **View History** – view the **chat history** for this visitor's account or IP address.
- **Add Note** – allows you to **attach a note** to this visitor's IP address.
- **Ban** – ban the user (by IP address). If banned, the visitor's chat requests will not be processed and the visitor will not appear on the monitor pane list. The visitor will also not be able to see any **live support status images** for your support desk installation. For more information on banning a visitor, see visitor banning.

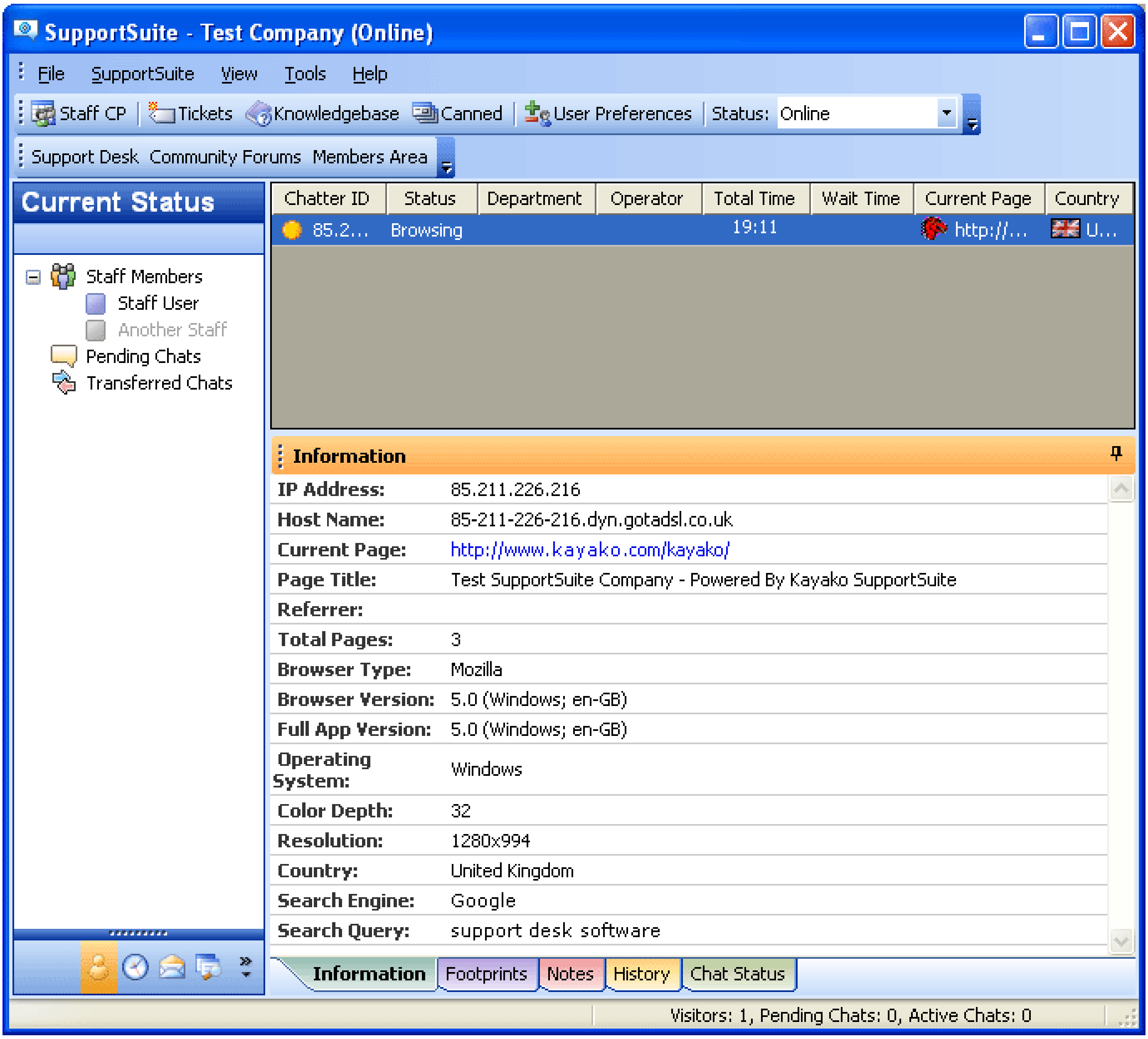
The Client Application polls the server for new visitor data every 15 seconds by default (this value is configurable under general options). You can manually force a data refresh be pressing the **F5** key, or by clicking on the **View** menu, followed by **Refresh Visitor Data**.

Visitor information tabs

The location of the **visitor information tabs** is shown below.


SupportSuite - My Company (Online)
File SupportSuite View Tools Help
Staff CP Tickets Knowledgebase Canned User Preferences Status: Online
Support Desk Community Forums Members Area
Current Status
Staff Members
Staff User
Another Staff
Pending Chats
Transferred Chats
Monitor Pane
Chat History
Chatter ID Status Country Current Page
Visitor Browsing General 02:07 .../inde... U...
80.85.61.18 Browsing 10:33 .../inde... H...
Information
IP Address: 85.211.104.38
Host Name: 85-211-104-38.dyn.gotadsl.co.uk
Current Page: http://www.kayako.com/kayako/index.php?_m=troubleshooter&_a=steps&troubleshootercatid=1&parentid=0
Page Title: Test SupportSuite Company - Powered By Kayako SupportSuite
Referrer:
History Chat Status Notes Footprints Information
Visitors: 2, Pending Chats: 0, Active Chats: 0
The user information tabs.

Information

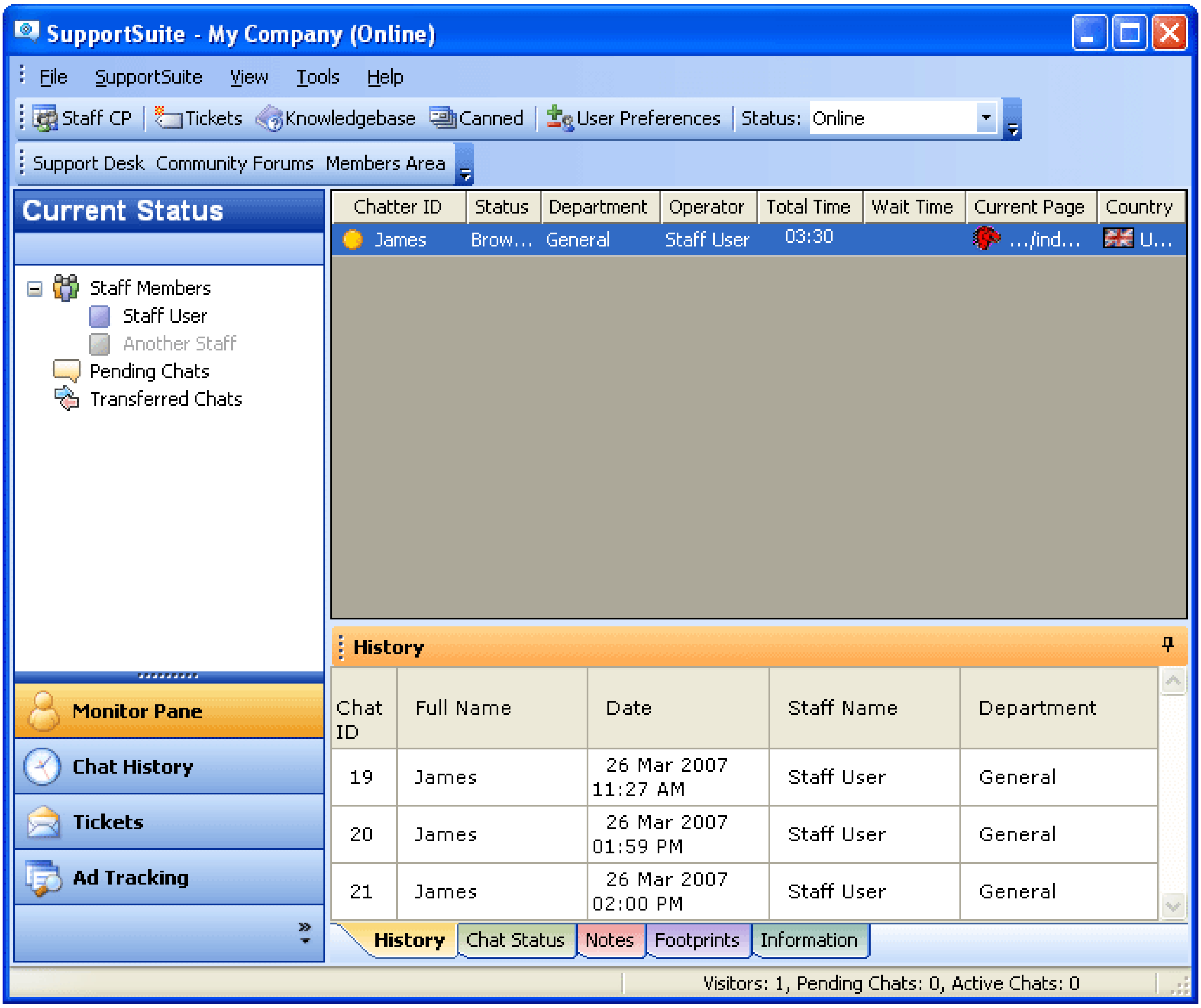


The **information** tab gives a comprehensive overview of information about the selected visitor.

- **IP Address** – the IP address of the visitor.
- **Host Name** – the resolved IP address of the visitor.
- **Current Page** – the page the visitor was last logged as browsing.
- **Page Title** – the title of the page the visitor was logged as browsing.
- **Referrer** – what page the user was referred from. If blank, either the visitor's referrer could not be logged or the user came directly to this page.

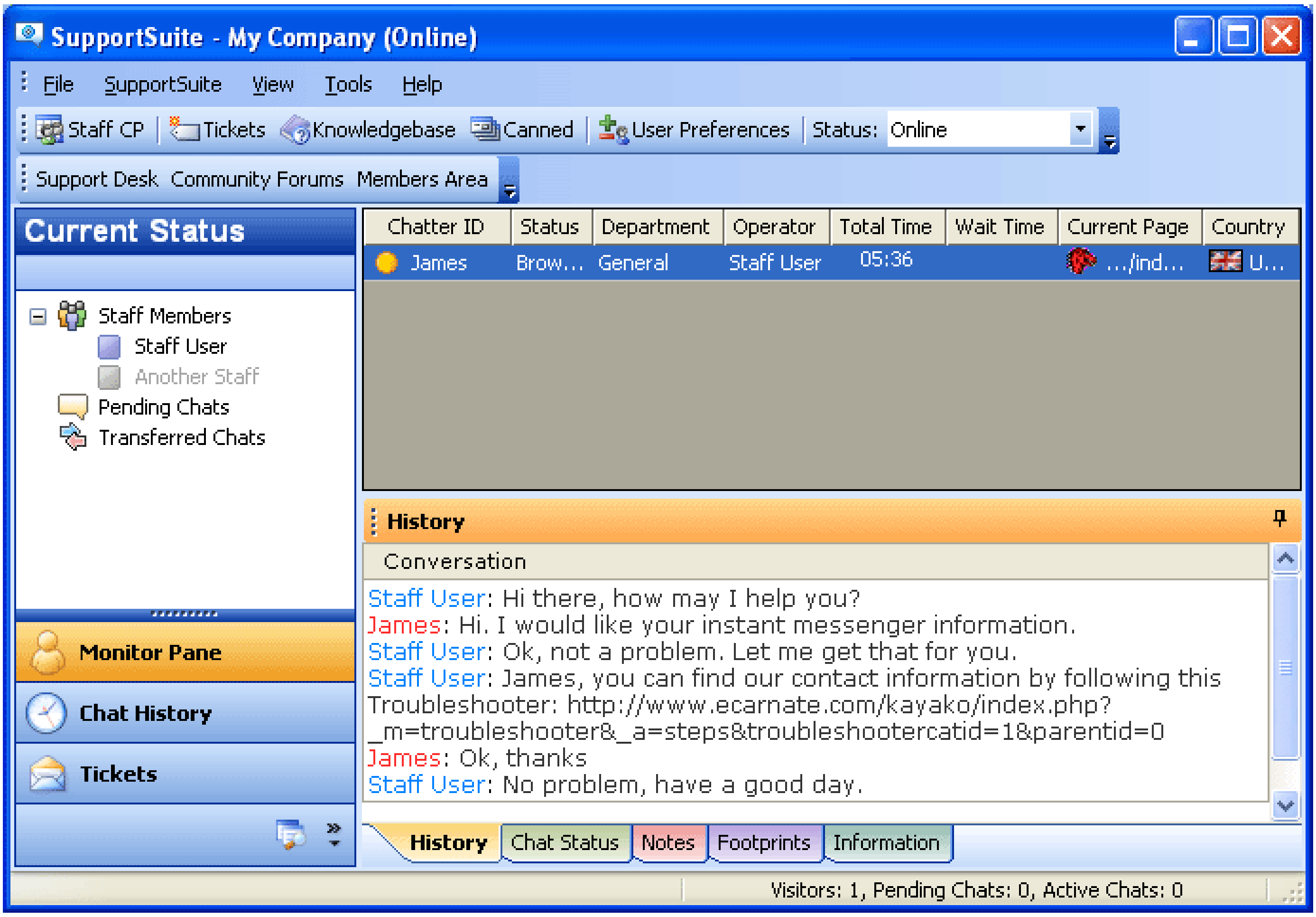
- **Total Pages** – the total number of pages the visitor has been logged browsing.
- **Browser Type / Browser Version / Full App Version** – information about the visitor's web browser.
- **Operating System** – what operating system the visitor is running.
- **Color Depth** – the color depth the visitor is using.
- **Resolution** – the screen resolution the visitor is using.
- **Country** – the approximated geographical location of the visitor, based on the IP address.
- **Search Engine** – the name of the search engine if visitor was referred from a search engine.
- **Search Query** – if the data can be found, what keywords the visitor typed into the search engine to find your web site.

History

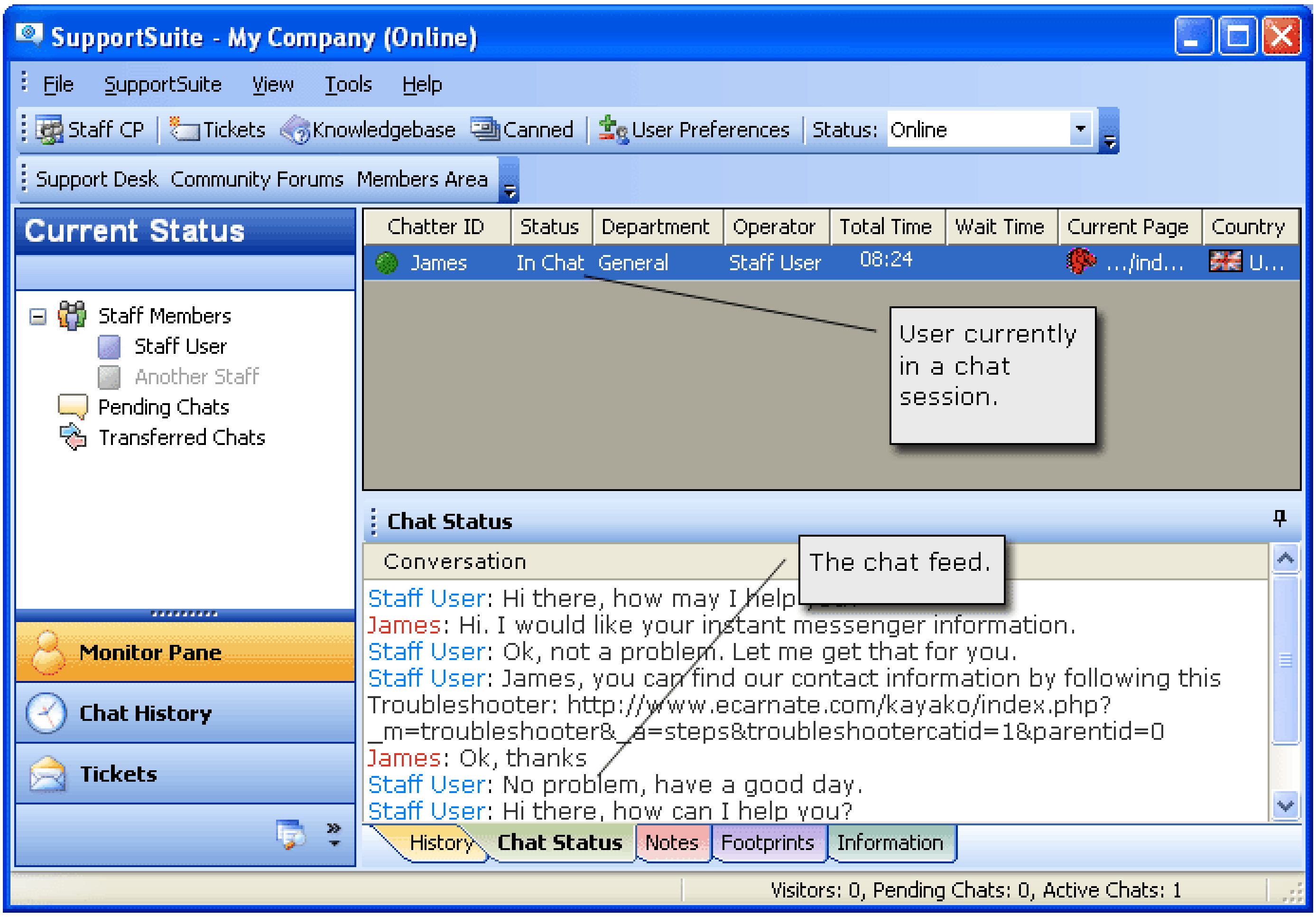


The **history** tab is shown above. It lists all chat histories associated with this visitor's user account (if registered and logged in) or their IP address.

To view a chat history, click on the respective **Chat ID**. It will open up the chat history for that session, as shown below.

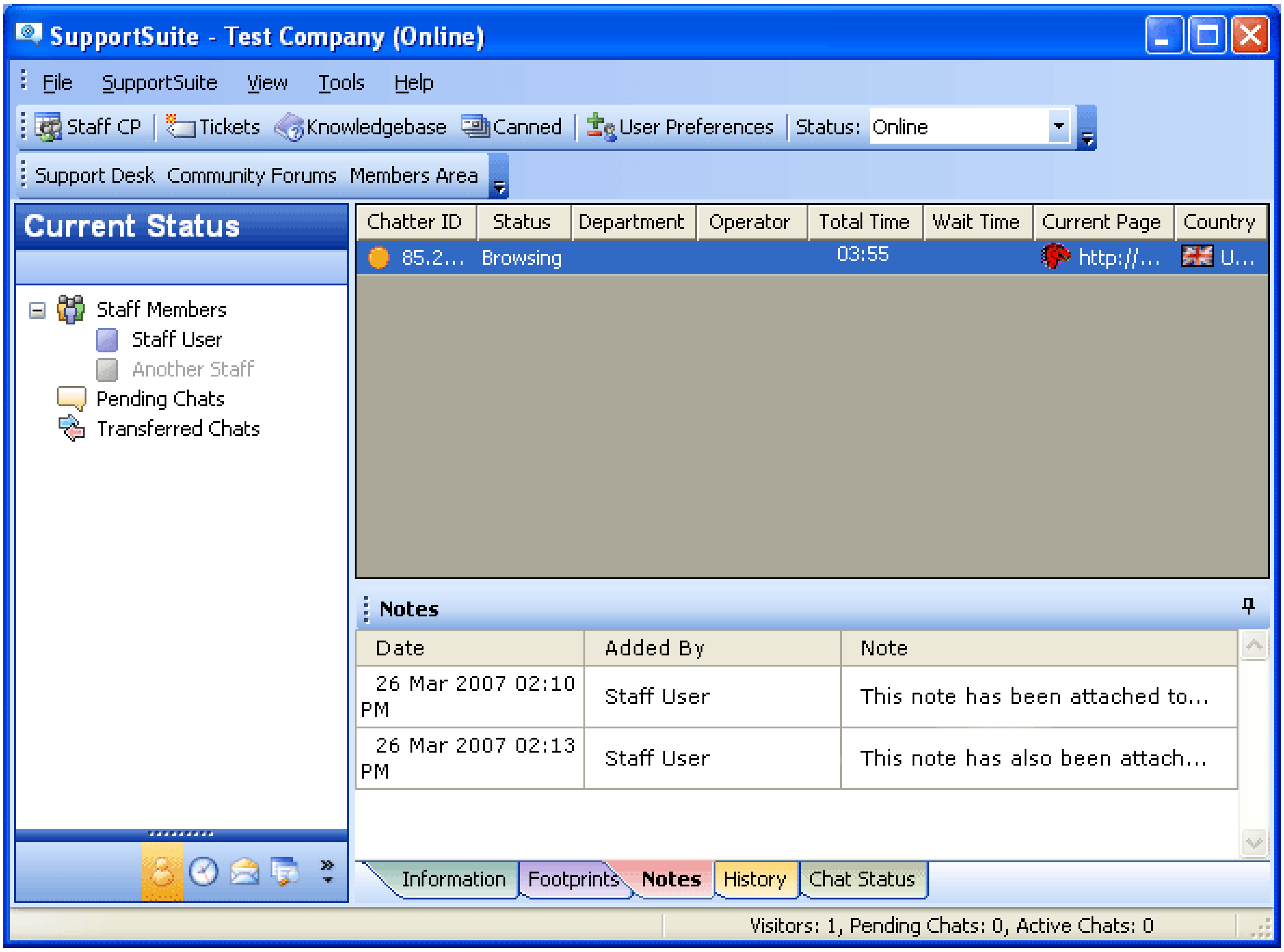

SupportSuite - My Company (Online)
File SupportSuite View Tools Help
Staff CP Tickets Knowledgebase Canned User Preferences Status: Online
Support Desk Community Forums Members Area
Current Status
Staff Members
Staff User
Another Staff
Pending Chats
Transferred Chats
Monitor Pane
Chat History
Tickets
Chatter ID Status Department Operator Total Time Wait Time Current Page Country
James Brow... General Staff User 05:36 .../ind... U...
History
Conversation
Staff User: Hi there, how may I help you?
James: Hi. I would like your instant messenger information.
Staff User: Ok, not a problem. Let me get that for you.
Staff User: James, you can find our contact information by following this Troubleshooter: http://www.ecarnate.com/kayako/index.php?_m=troubleshooter&_a=steps&troubleshootercatid=1&parentid=0
James: Ok, thanks
Staff User: No problem, have a good day.
History Chat Status Notes Footprints Information
Visitors: 1, Pending Chats: 0, Active Chats: 0

Chat status



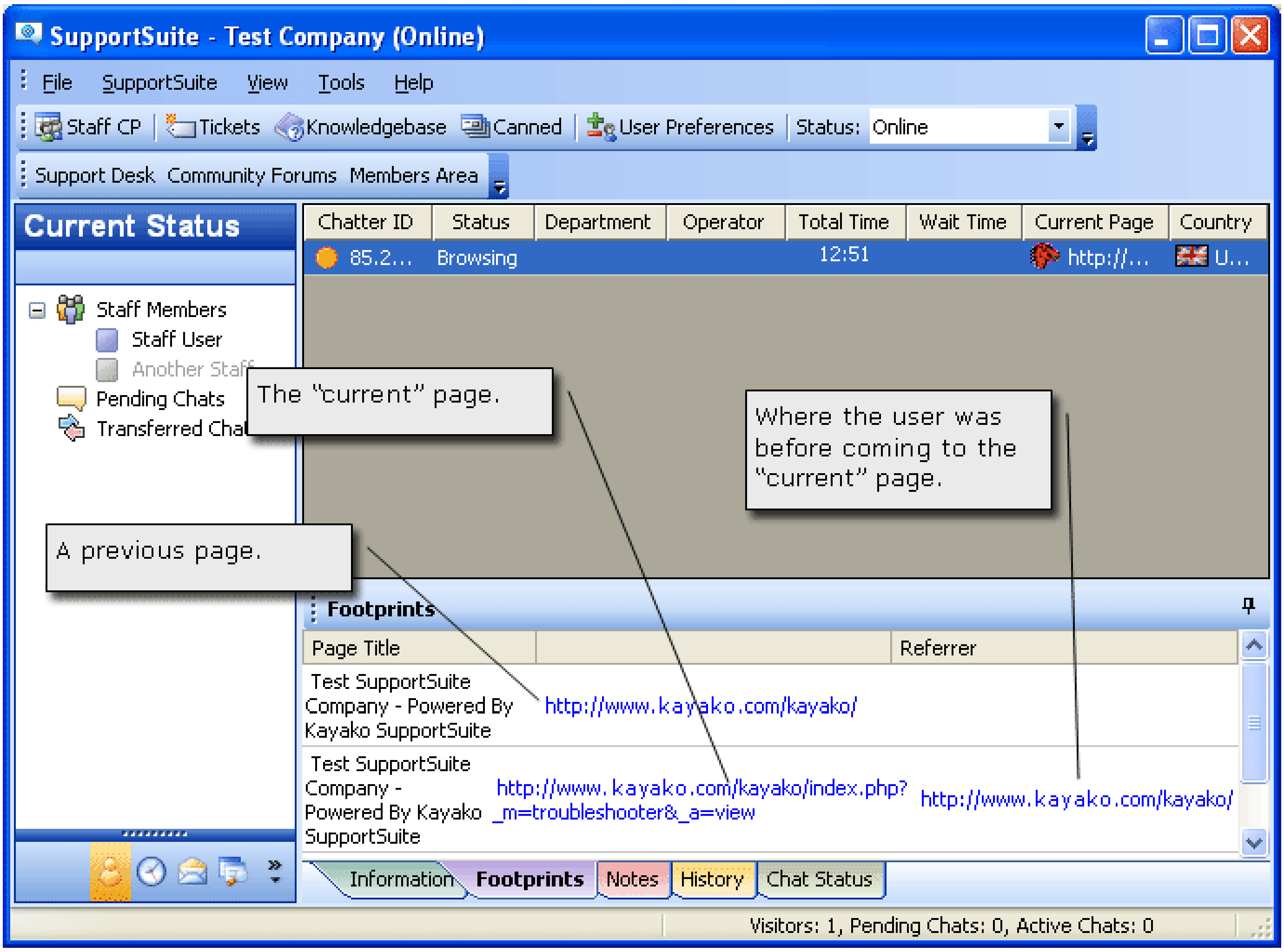
The **chat status** tab shows either the most recent chat session with the visitor or a live feed of a chat in progress (refreshable by clicking on the **Refresh** link at the bottom of the chat feed).

Notes



Visitor notes can be added from within the monitor pane or from within a chat session window. When a note is attached to a visitor, the note is stored according to that visitor's IP address. This means that, should the same visitor return to your support desk with a different IP address, you will not be able to view the notes for this user left according to their previous IP address.

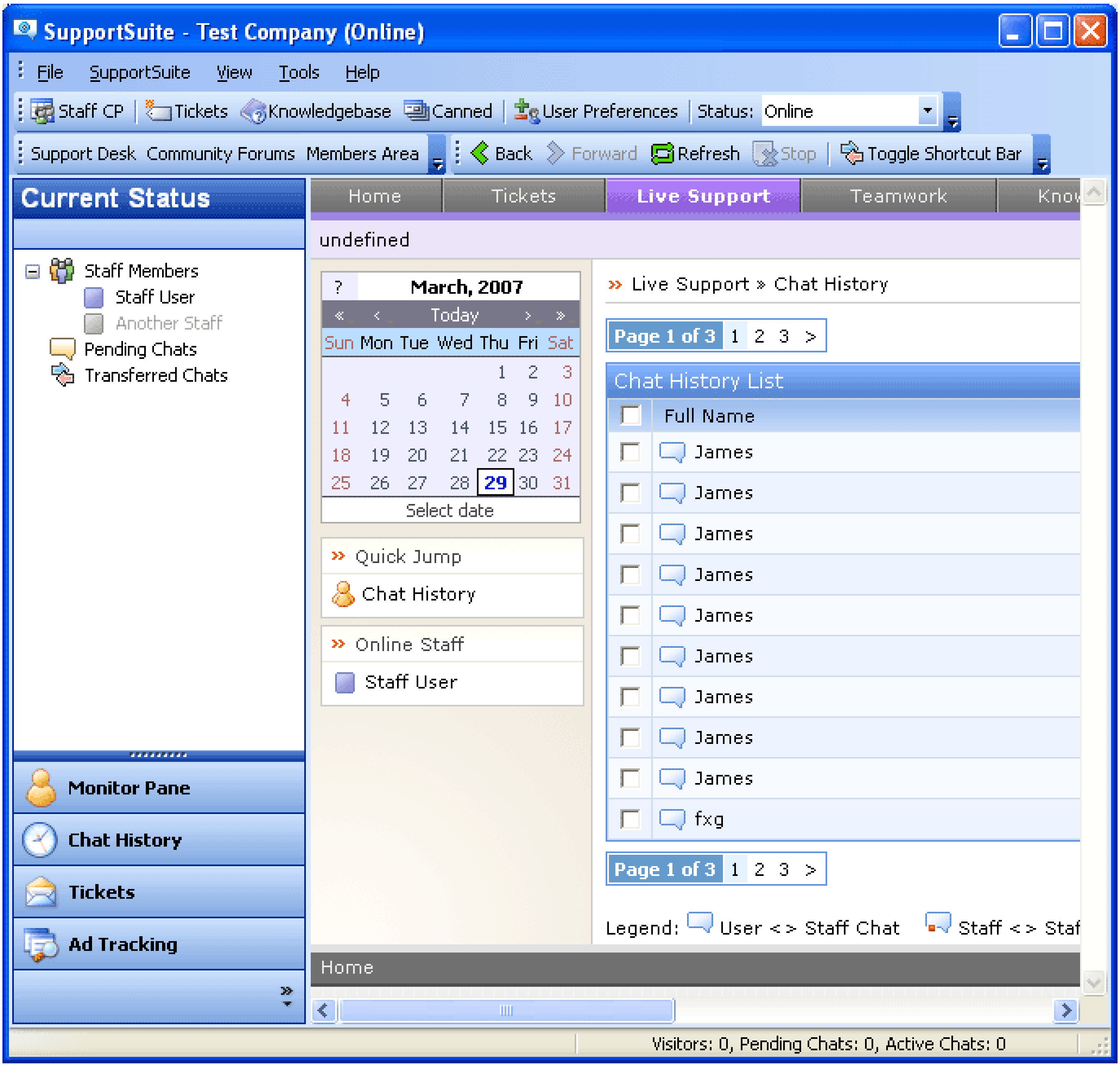
Footprints



A visitor's **footprints** are left when browsing your support desk, or any of your web pages that have been tagged using visitor tracking JavaScript (see What is a "Tag"?).

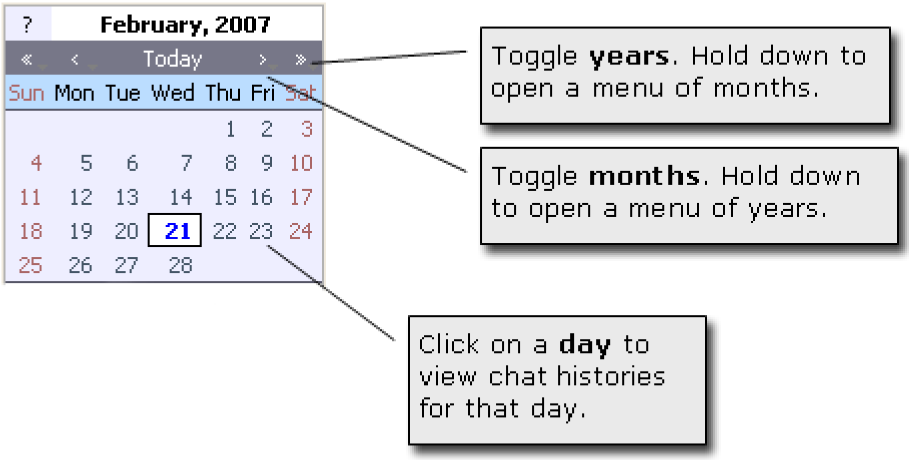
Chat history

Full documentation for the **chat history database** features of SupportSuite and LiveResponse are available in the **staff control panel** manual.



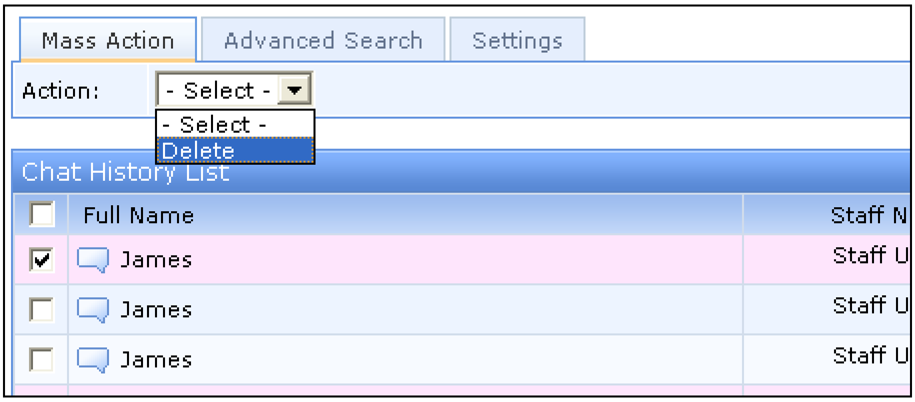
The **chat history** pane (shown above) gives a browser-type interface to the SupportSuite or LiveResponse **staff control panel**. From here, you can access all staff control panel functions as well as the chat histories.

Chat histories can be filtered by **data**. To filter by date, use the dynamic calendar to select a date, as shown below.

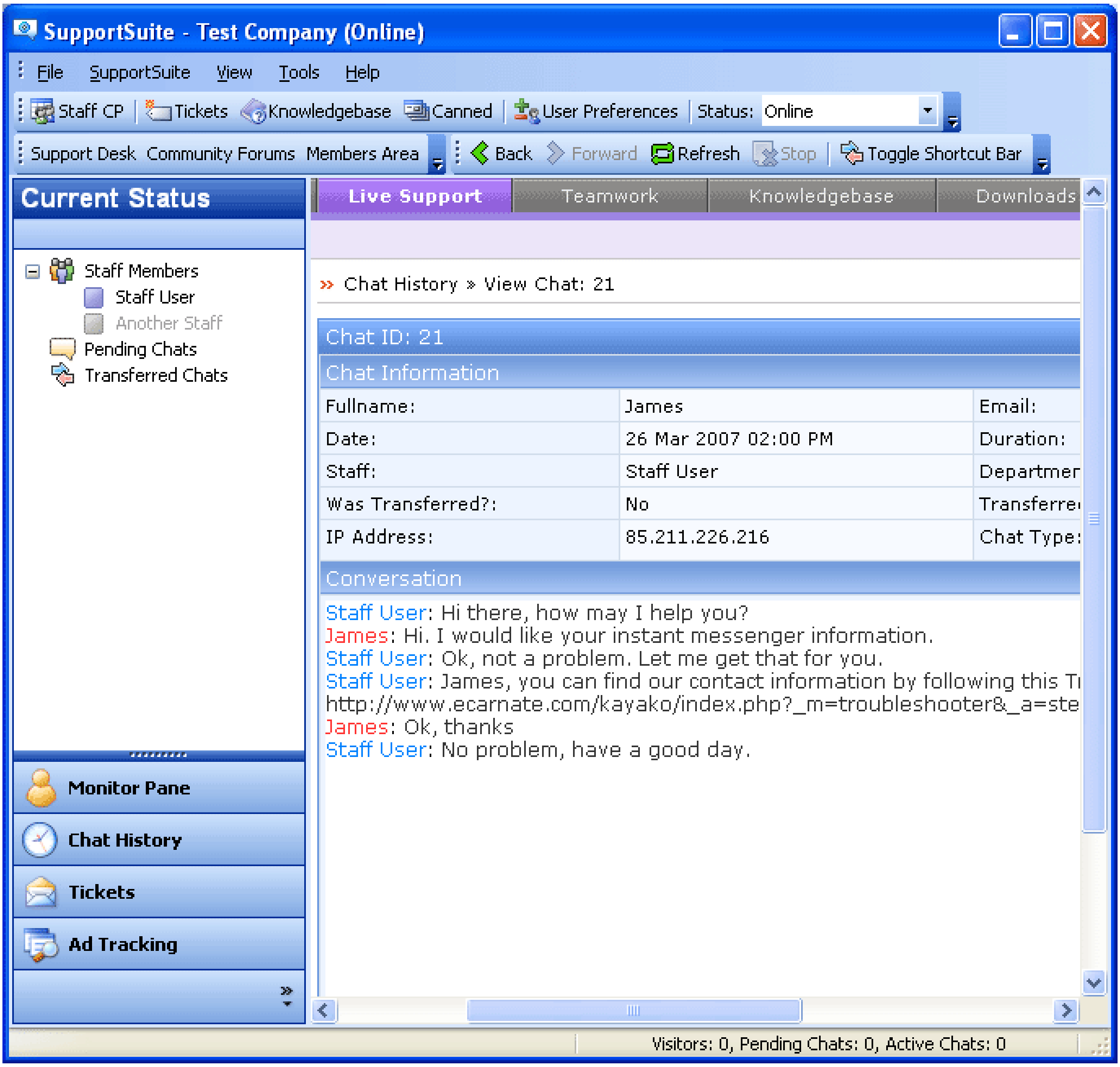


Selecting multiple chat history entries (by checking the corresponding check boxes) will open the **mass-management menu**, as shown below. Using this menu, entries can be mass-deleted.

Under the **Advanced Search** tab, entries can be searched for by visitor name, e-mail or transcript contents. Under the **Settings** tab, the number of entries shown per page (if there are many) can be limited.

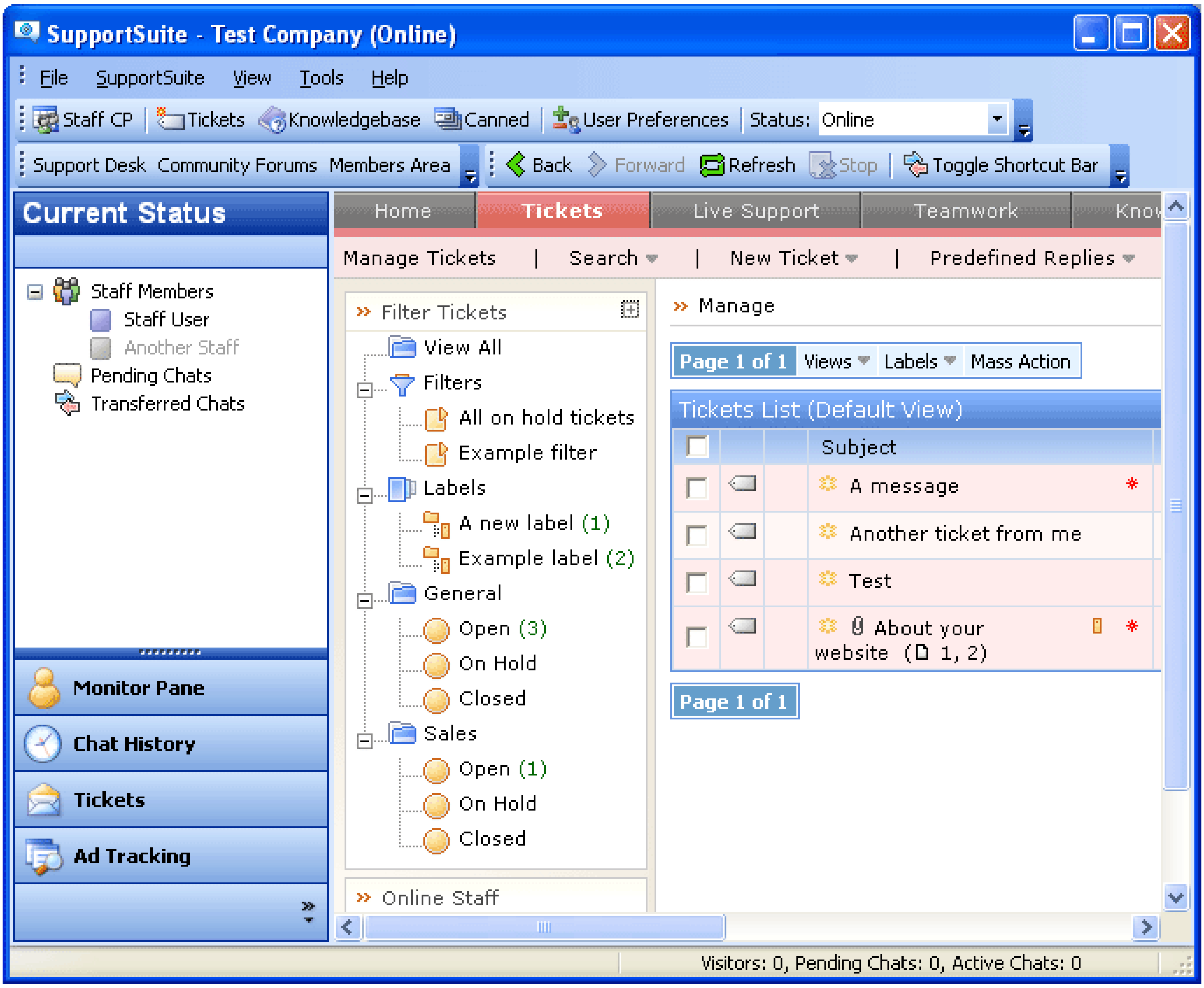


To view a chat history, click on the chat entry name. The transcript of this chat will be shown, as shown below.


SupportSuite - Test Company (Online)
File SupportSuite View Tools Help
Staff CP Tickets Knowledgebase Canned User Preferences Status: Online
Support Desk Community Forums Members Area Back Forward Refresh Stop Toggle Shortcut Bar
Current Status
Staff Members
Staff User
Another Staff
Pending Chats
Transferred Chats
Monitor Pane
Chat History
Tickets
Ad Tracking
Live Support Teamwork Knowledgebase Downloads
» Chat History » View Chat: 21
Chat ID: 21
Chat Information
Fullname: James Email:
Date: 26 Mar 2007 02:00 PM Duration:
Staff: Staff User Departmer
Was Transferred?: No Transferre
IP Address: 85.211.226.216 Chat Type:
Conversation
Staff User: Hi there, how may I help you?
James: Hi. I would like your instant messenger information.
Staff User: Ok, not a problem. Let me get that for you.
Staff User: James, you can find our contact information by following this Tr
http://www.ecarnate.com/kayako/index.php?_m=troubleshooter&_a=ste
James: Ok, thanks
Staff User: No problem, have a good day.
Visitors: 0, Pending Chats: 0, Active Chats: 0

Tickets

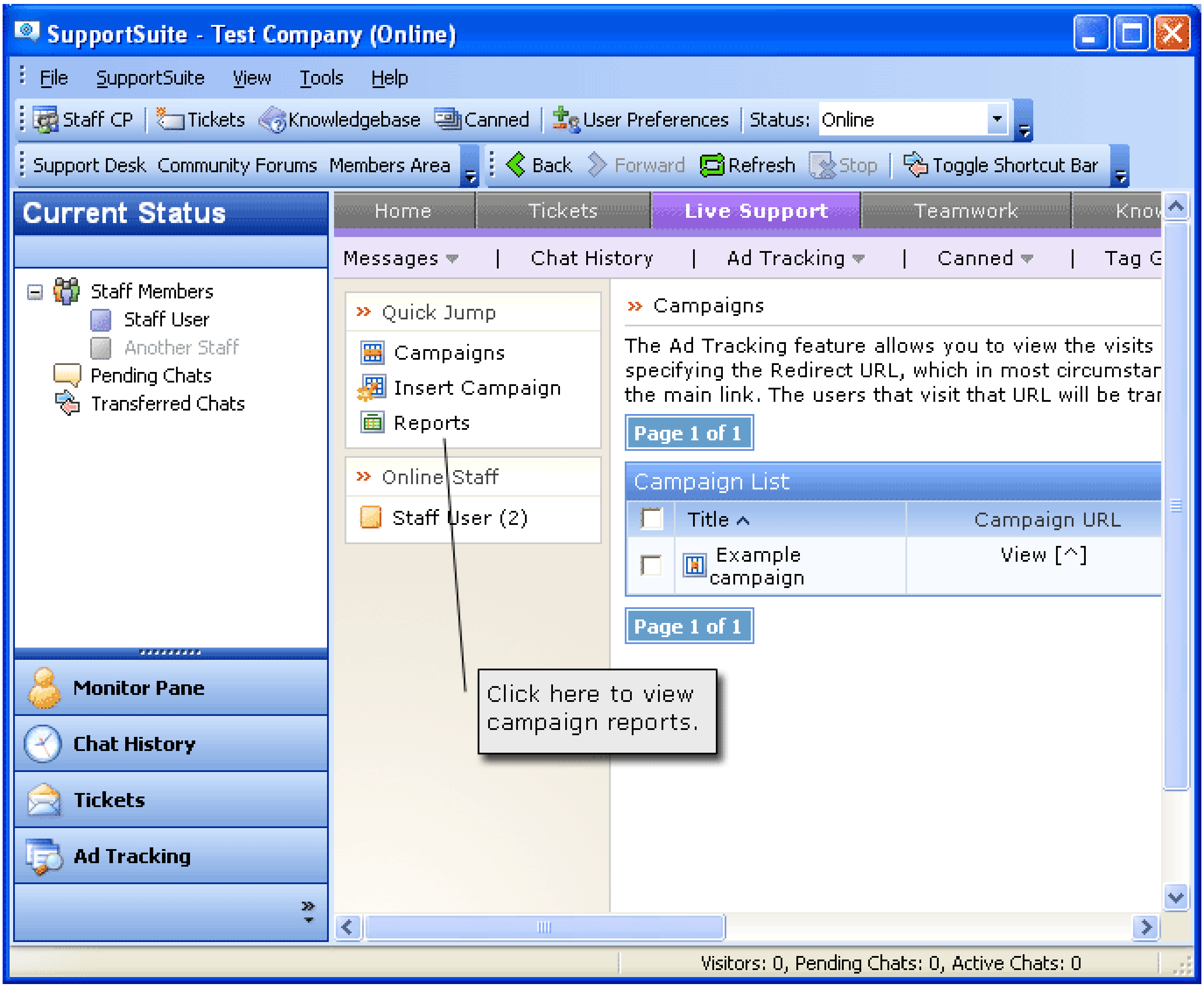
Full documentation for the **ticket** features of SupportSuite and LiveResponse are available in the **staff control panel** manual.



The **tickets** pane (shown above) gives a browser-type interface to the SupportSuite or LiveResponse **staff control panel**. From here, you can access all staff control panel functions as well as the ticket features.

Ad tracking

Full documentation for the **ad tracking** features of SupportSuite and LiveResponse are available in the **staff control panel** manual.



The **ad tracking** pane (shown above) gives a browser-type interface to the SupportSuite or LiveResponse **staff control panel**. From here, you can access all staff control panel functions as well as the ad tracking and campaign tools.

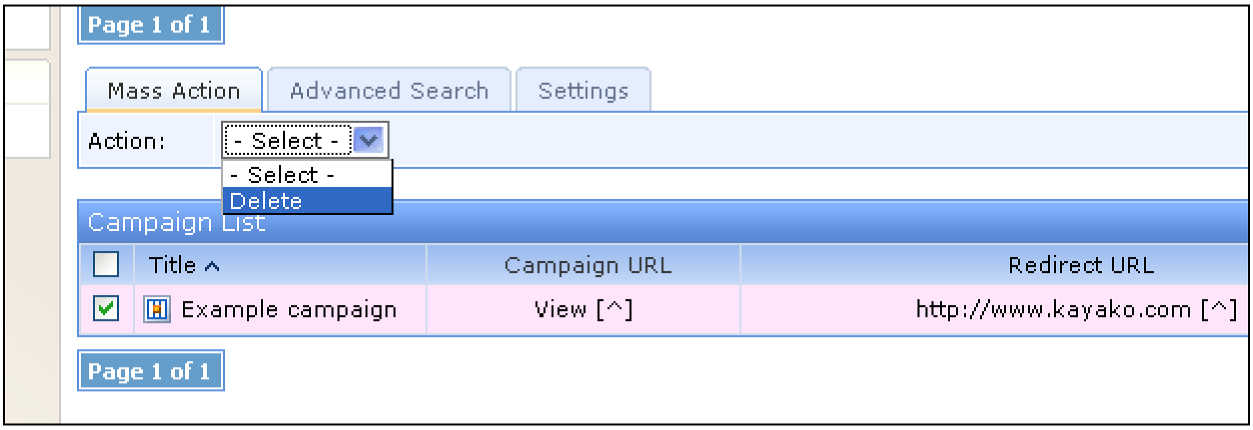
To edit a campaign, click on the corresponding edit button next to the corresponding campaign, as shown below.

Campaign List

	Title	Campaign URL	Redirect URL	Options
	Example campaign	View [^]	http://www.kayako.com [^]	Edit Delete

Selecting multiple campaigns (by checking the corresponding check boxes) will open the **mass-management menu**, as shown below. Using this menu, campaigns can be mass-deleted.

Under the **Advanced Search** tab, campaigns can be searched for by title or URL. Under the **Settings** tab, the number of campaigns shown per page (if there are many) can be limited.



Handling chats

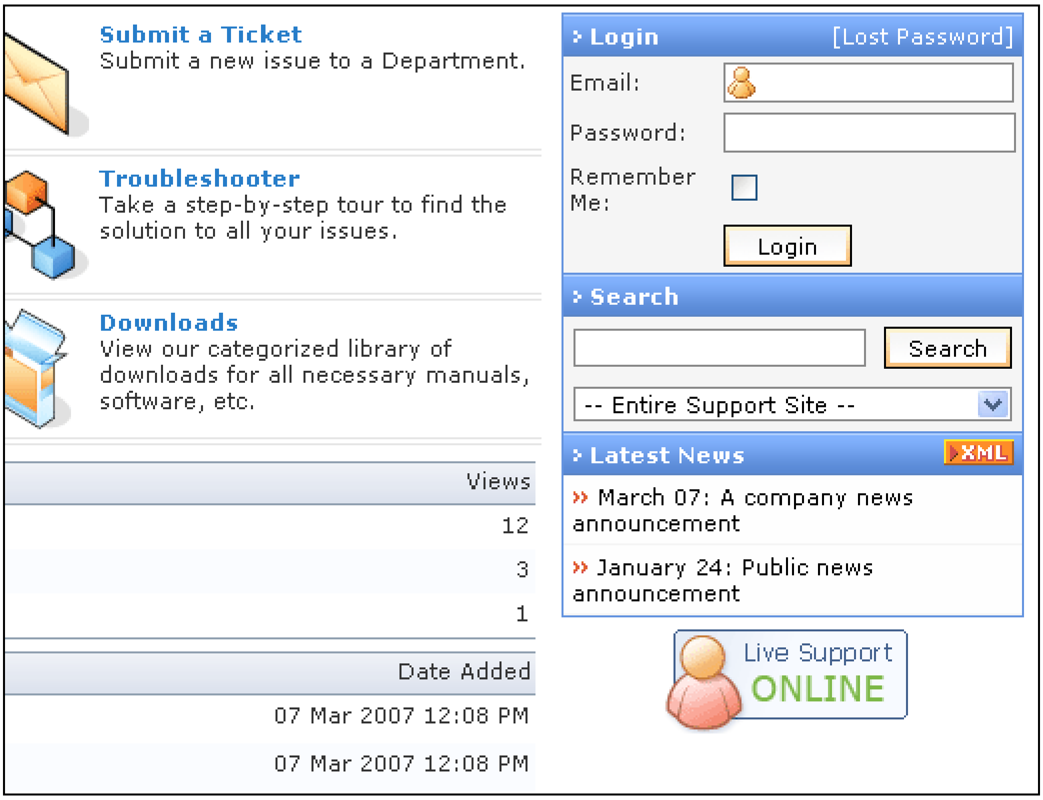
The main functionality of the Client Application exists in its staff user interface to the live chat system of SupportSuite and LiveResponse.

Via your client interface to your SupportSuite or LiveResponse installations or by a website that features your 'live chat' tag (see What is a "Tag"?), visitors can initiate a chat request. The visitor will then asked for a **name** and an **e-mail** address.

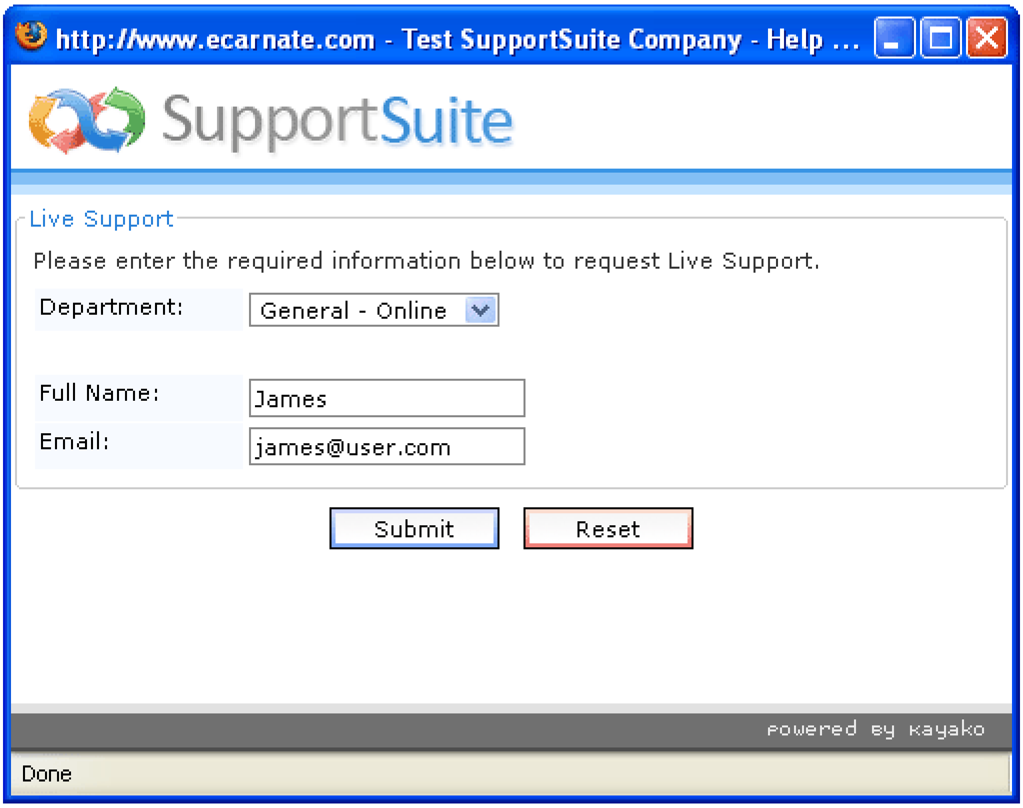
Depending on how many of your staff users are available and for what live chat department, the visitor may be placed in a queue for support. If configured in the **administrator control panel**, the visitor will be told how many are in the queue before him.

Stage one: Visitor makes a chat request

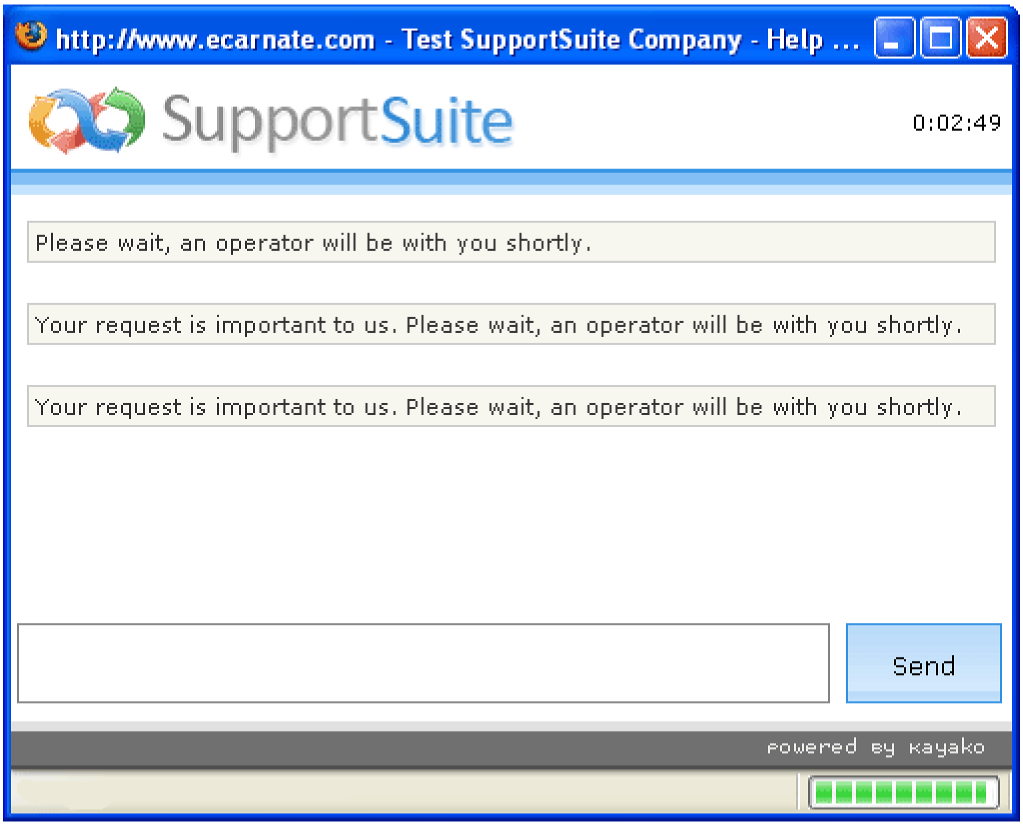
The visitor opens the Live Support tag (see What is a "Tag"?) on your support desk or tagged web page, as shown below.



Next, the visitor enters his or her **name** and **e-mail** address, as shown below.

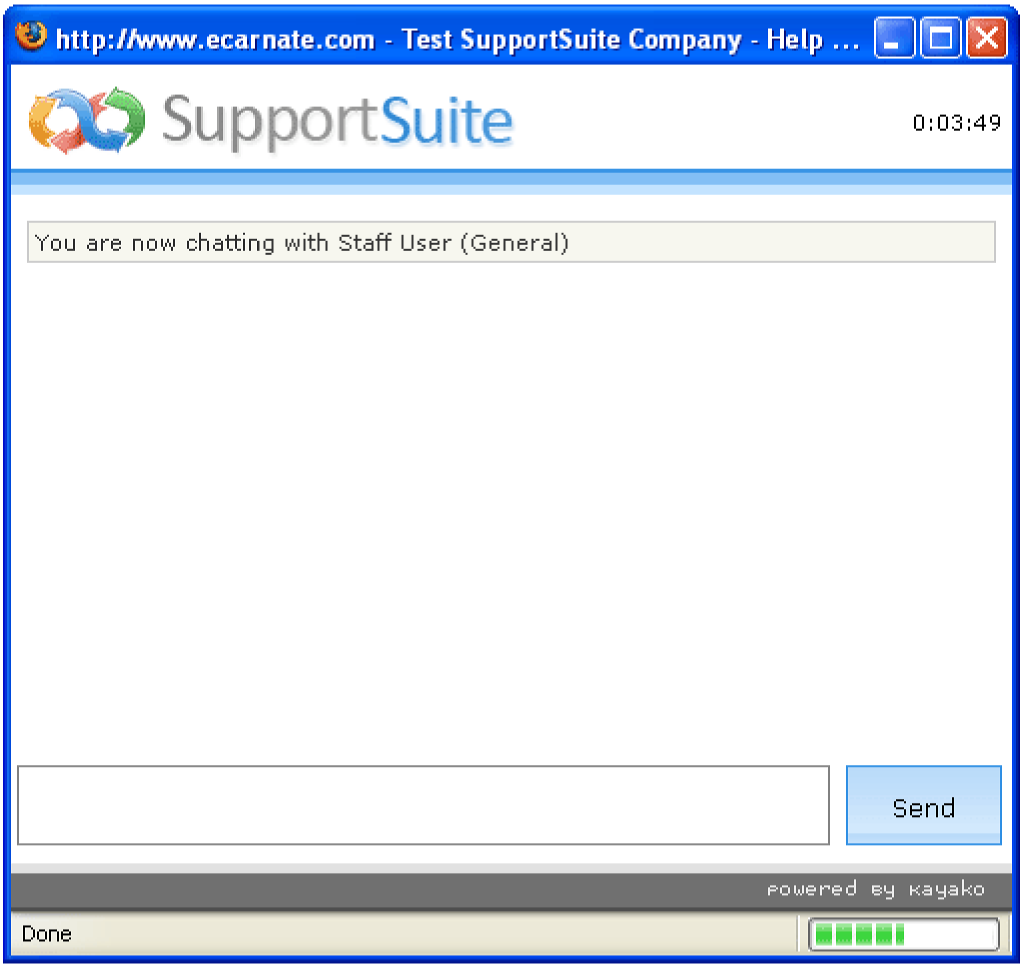


After clicking on the **Submit** button, the visitor enters the **support queue**. The visitor is shown the message in the figure below every X seconds for Y tries (both of these values are configured via the **administrator control panel**).

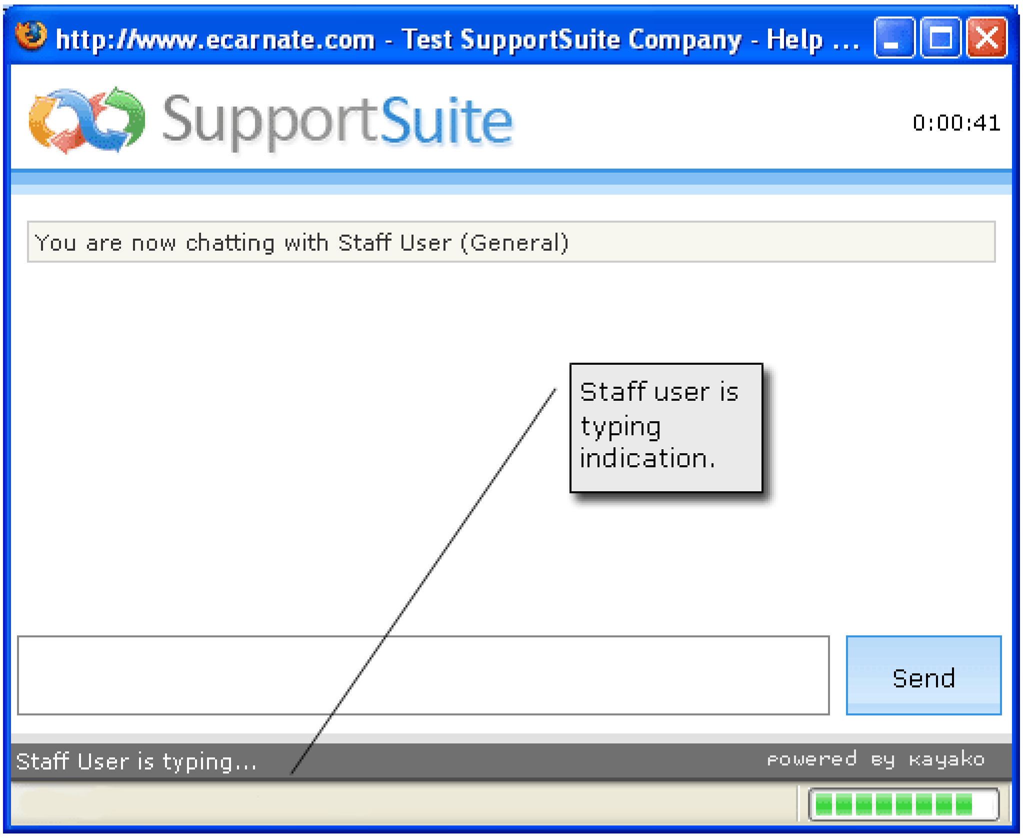


Chat request accepted

If a staff user accepts a visitor's chat request, the acceptance is indicated on the client's chat window as shown below.

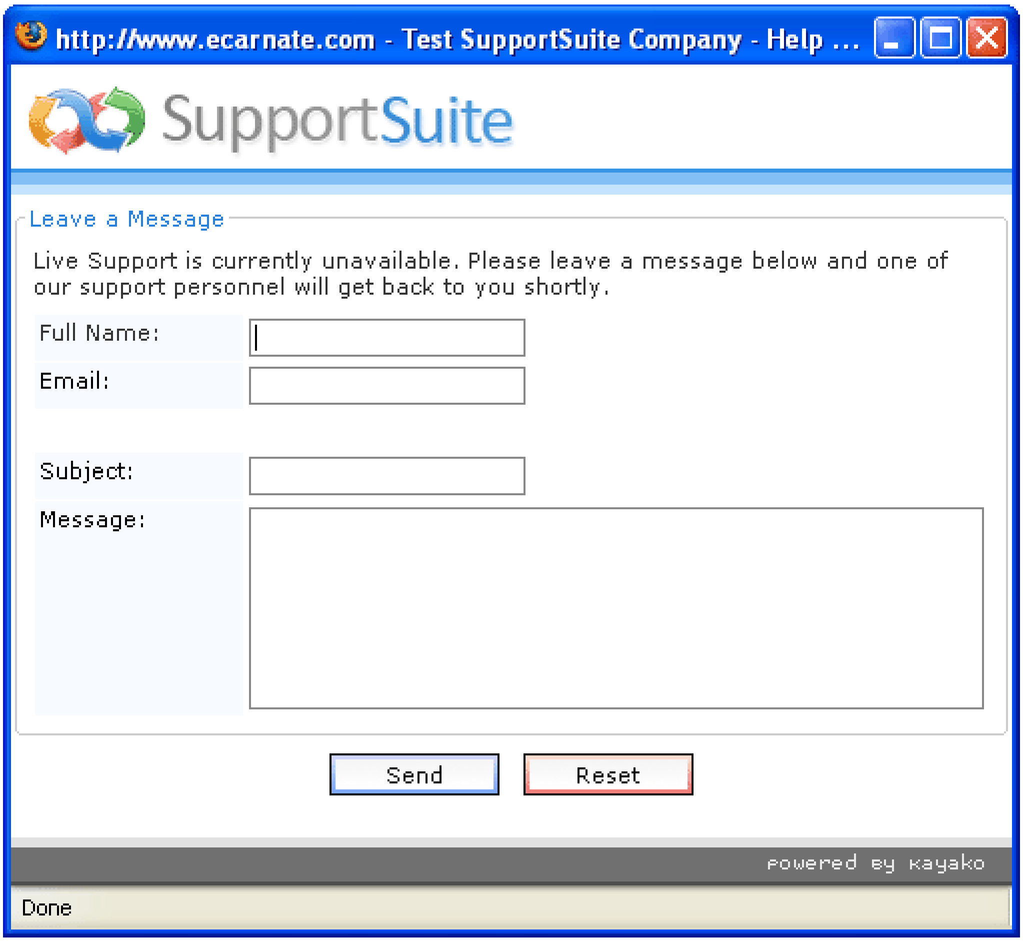


When you (the staff user) is typing, the client is given indication of this as shown below.



Chat unavailable or request rejected

If a visitor's chat request is not accepted before the number of tries runs out, the visitor is shown a message dialog, as shown below.



Chat may not be available for any one of the following reasons:

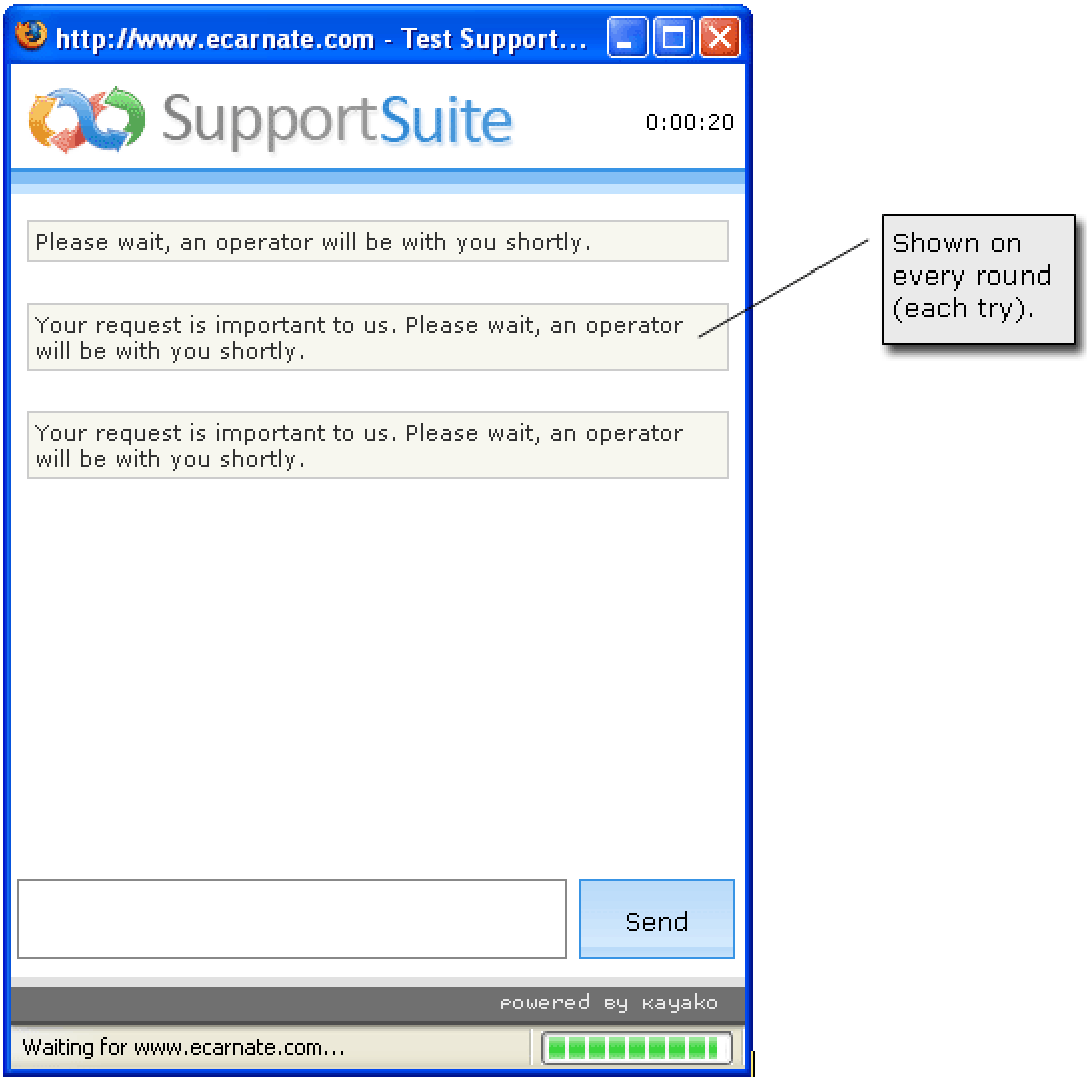
- There are no available staff users.
- The chat request was actively refused.
- All staff user's are set to busy (handling too many chats – this value is configured per Client Application in the Client Application options).
- All staff users are set to away or be back shortly (a staff user's status is configured per Client Application in the Client Application options).

Stage two: Staff receives chat request

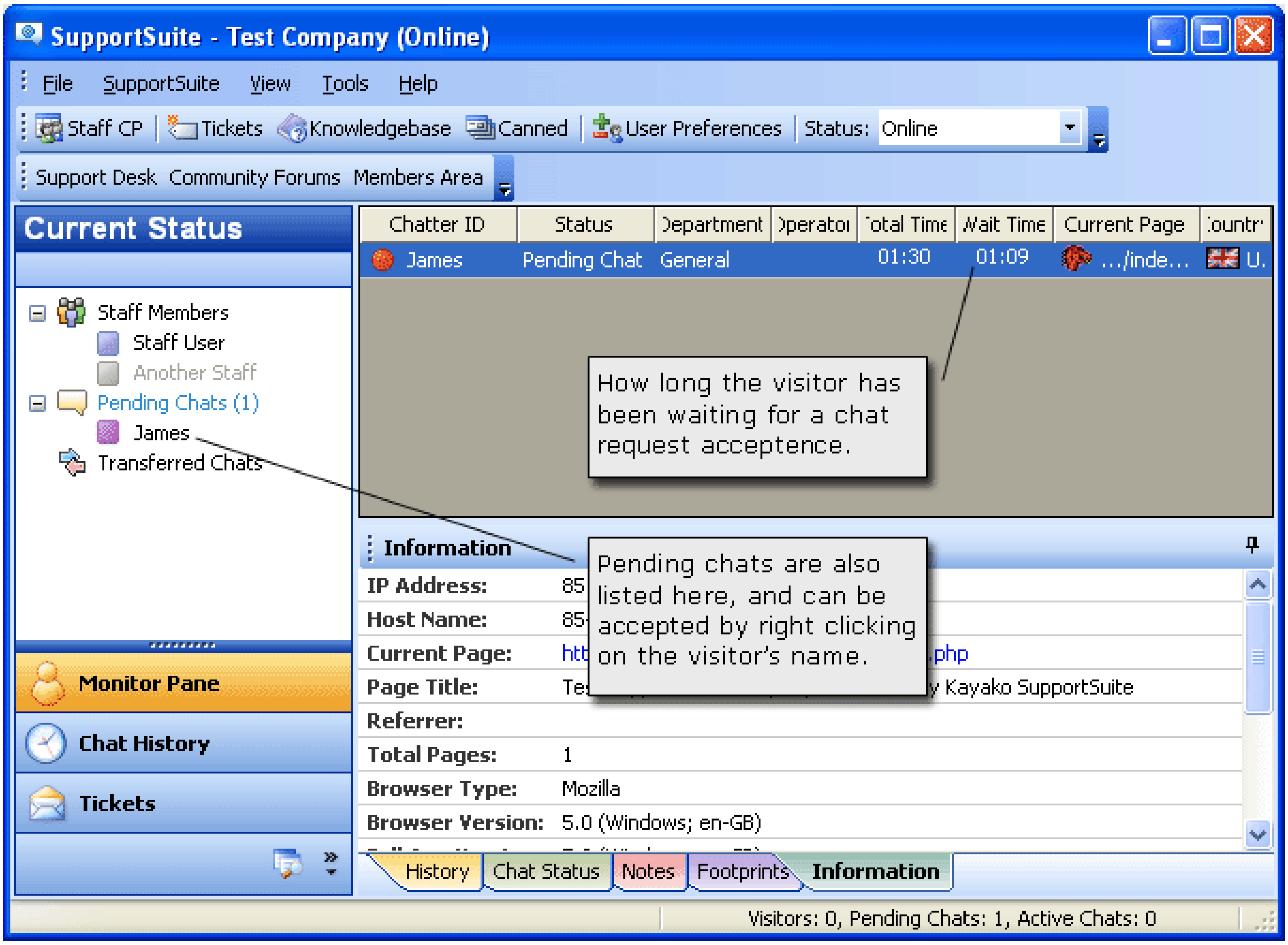
When a visitor requests a chat, the system attempts to notify each available staff user. If a staff user does not accept the chat request within the amount of time set under *Number of Seconds after each Retry* (**administrator control panel** > Live Support), the system will then attempt to notify the next available staff user.

This is called a **round-robin** system. The number of "rounds" (each **try**) is also configured within the **administrator control panel** under *Number of Chat Round Robin Retries*.

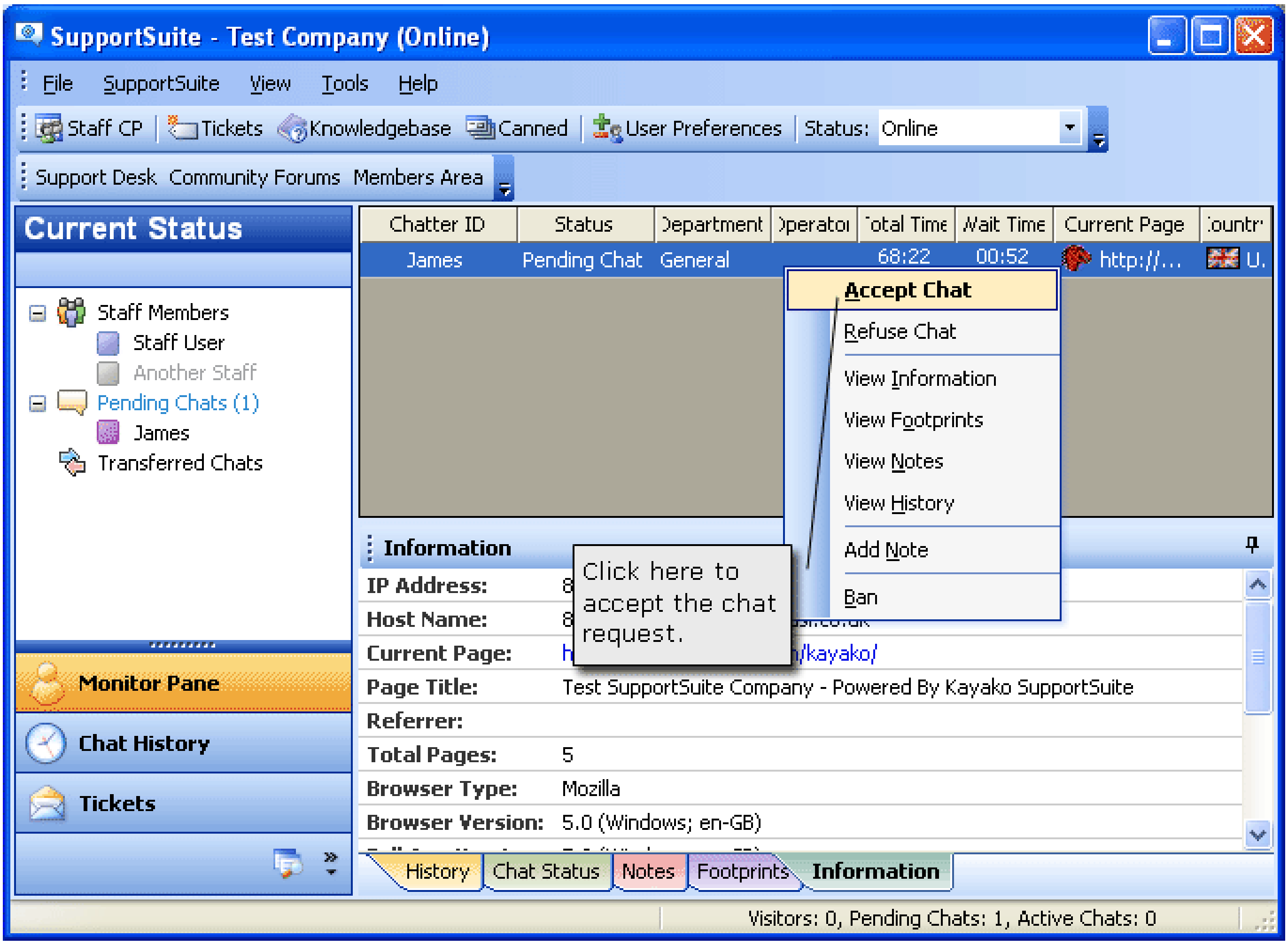
If no staff user accepts the chat after the number of tries is up, the user will be told that live chat is unavailable, and will be offered the option of leaving a message.



When a request comes in, it will be marked on the **monitor pane** and **current status bar**, as shown below.

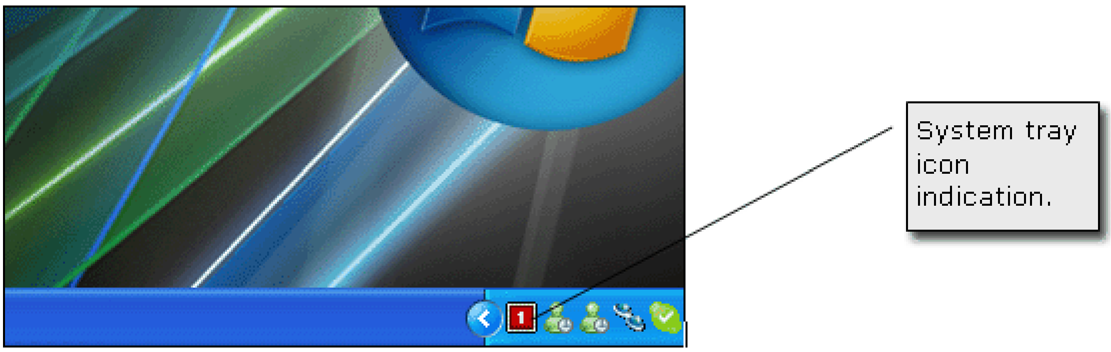


From the monitor pane you can accept the chat request by right-clicking on the requesting user, as shown below.



From here, chat requests can also be actively refused. When refused, the user will be shown a "Live Support is unavailable" notice, and will be given the opportunity to **send a message**.

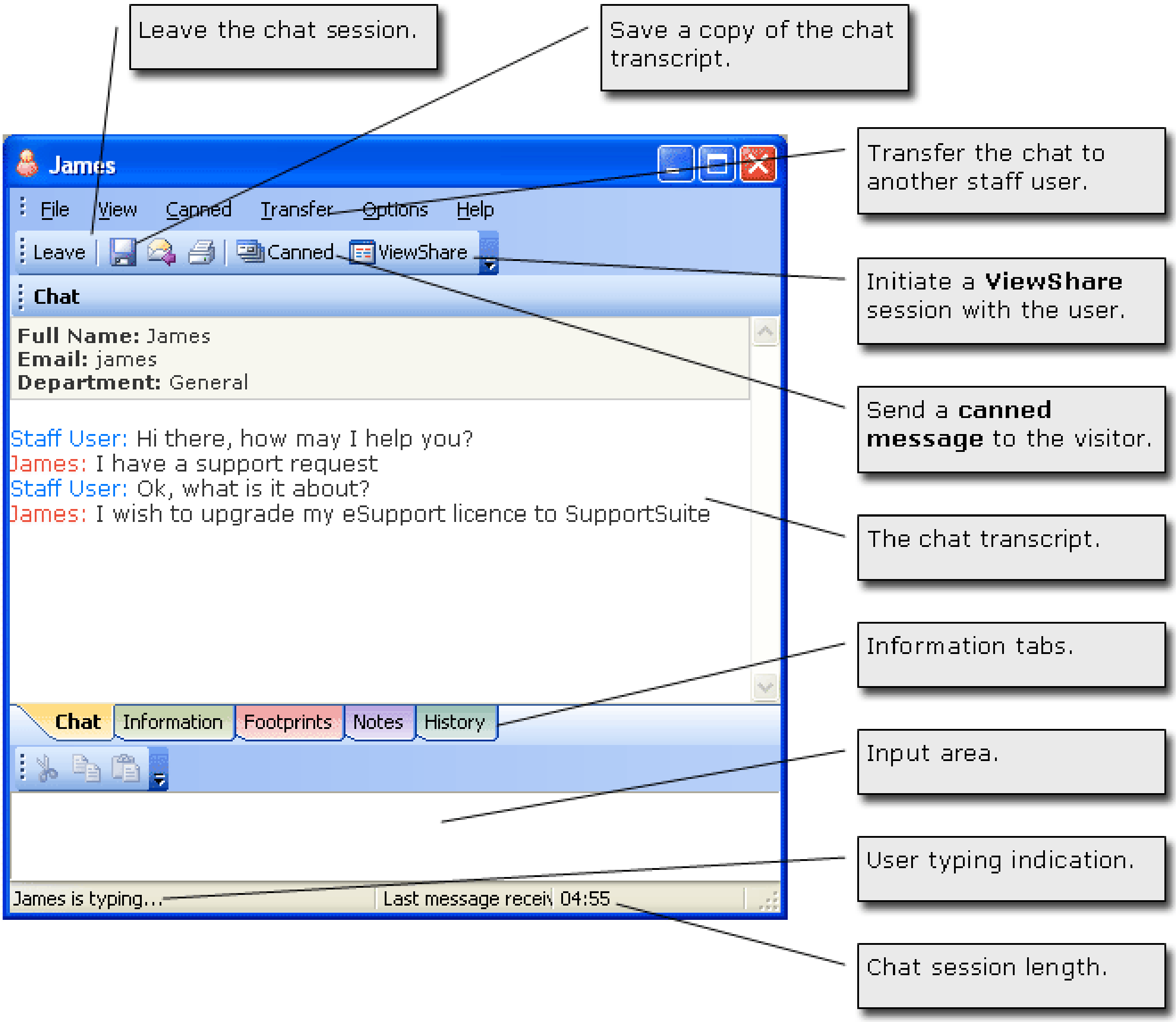
The **system tray** icon for the Client Application will flash **red** to indicate the pending chat request. The number in the middle of the icon shows the number of site visitors being monitored.



If configured within the Client Application options, a notification popup will display and a notification sound will chime, indicating the new chat request, as shown below.

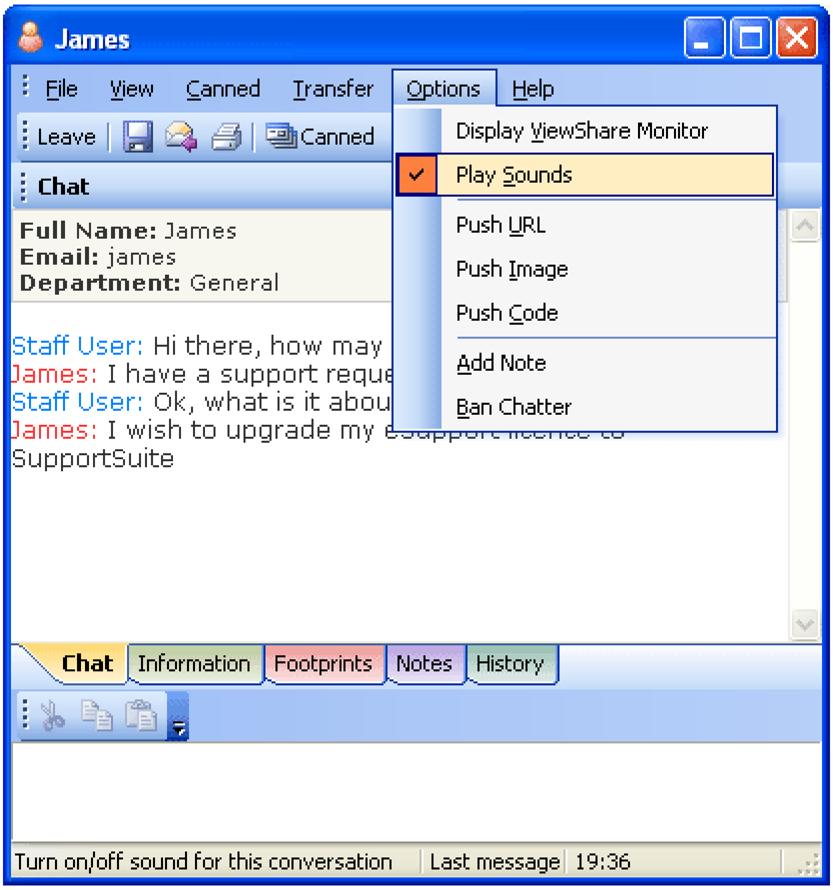
Clicking on this notification popup will accept the chat request and initiate the chat with the visitor, thus starting the chat session. If you just want to close the popup, click on the **x**, as indicated above.

Chat interface



The typical chat window for a staff user using the Client Application is shown above. To send a message to the visitor, type a message in the **input area** and press the enter key. When typing a message, the user will be notified that you are typing.

Under the **options** menu, a variety of extra tasks can be executed, as shown below.



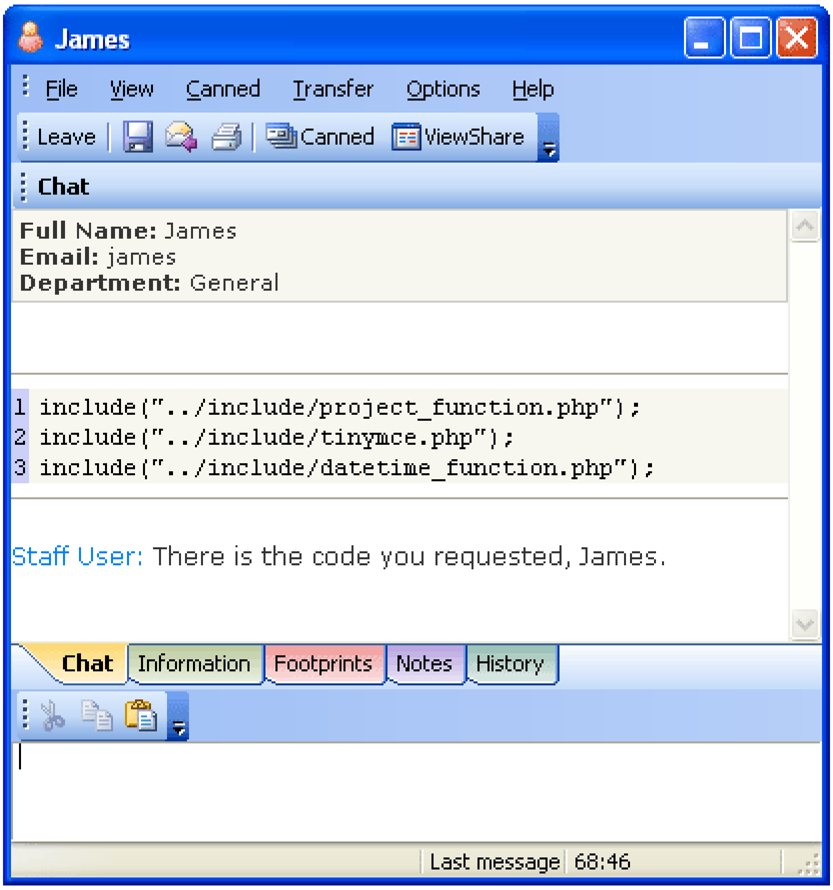
- **Display ViewShare Monitor** - see ViewShare monitor.

- **Play Sounds** – if enabled, a sound will be played notifying you to a new message from the user.

- **Push URL** – allows you to **push** a URL to the visitor. Pushing a URL involves forcibly opening up a new window within the visitor's browser that opens the URL given here.

- **Push Image** – allows you to push a URL of an image to the visitor, opening in the same way as pushing a URL.

- **Push Code** – allows you to send formatted and line-numbered code to the visitor, as shown below.



- **Add Note** – attach a note to the record of this visitor's IP address (notes entered this way are **not** their user account).

- **Ban Chatter** – ban the visitor by their IP address. If banned, the visitor's chat requests will not be processed and the visitor will not appear on the monitor pane list. The visitor will also not be able to see any **live support status images** for your support desk installation. For more information on banning a visitor, see visitor banning.

Information tabs

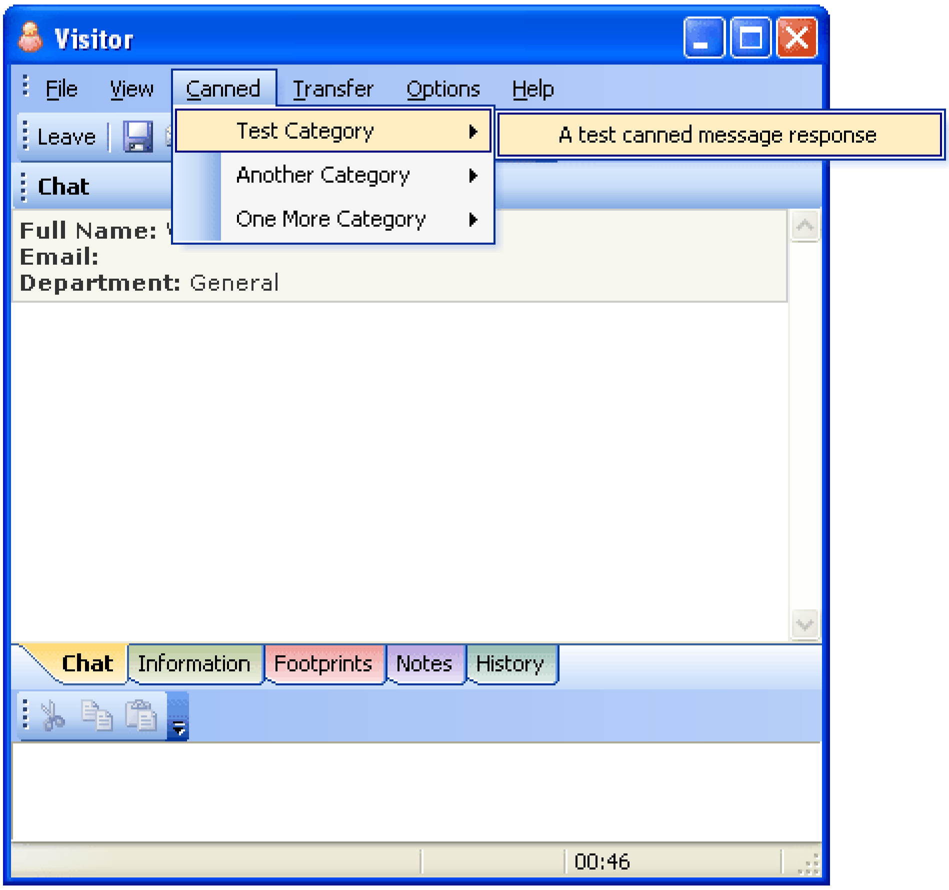
The information tabs here work exactly as there do In the monitor pane.

Using canned messages

A canned message acts as a **predefined reply**, also referred to as a **standard reply**. It is a copy/paste message or message template that can be used to more efficiently handle a support load.

To use a canned message from the chat interface:

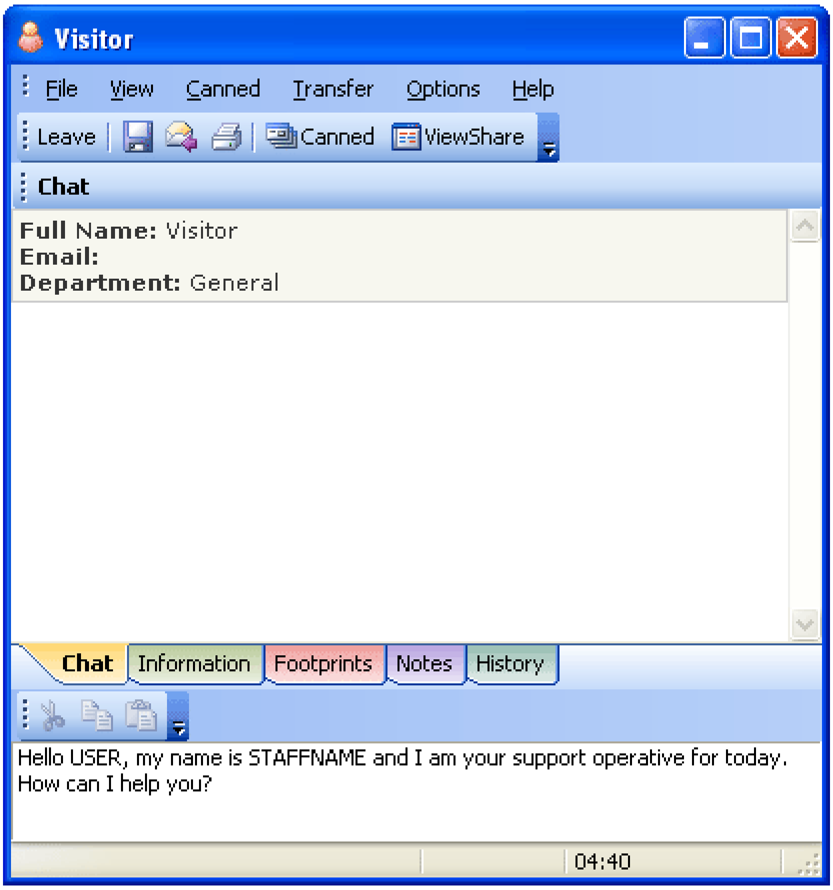
1. Open the **Canned** menu, as shown below.



2. Navigate to the category and sub-categories as appropriate.

3. Click on the canned message you wish to insert.

The message will **not** be sent immediately – it will simply be copied to the input area where the message contents can be edited, as shown below.



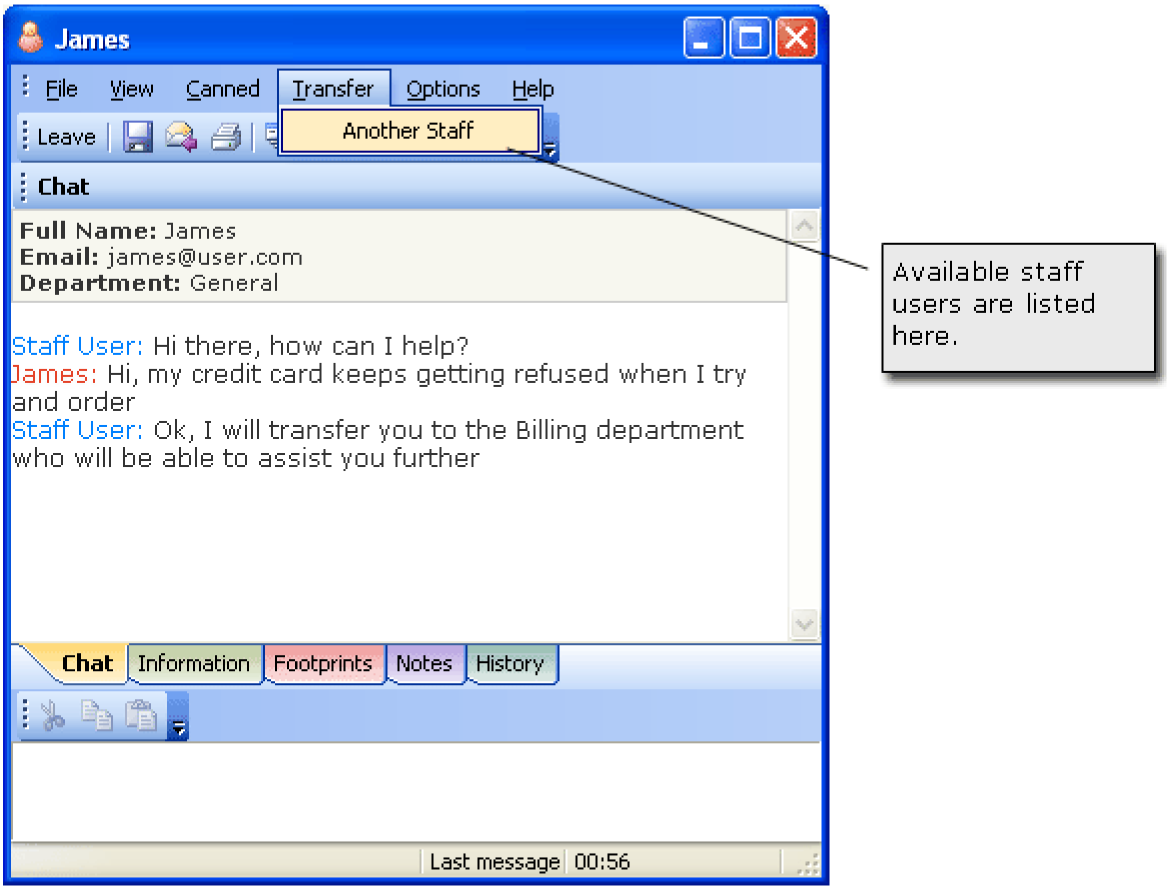
For information on managing **canned messages**, see managing canned messages.

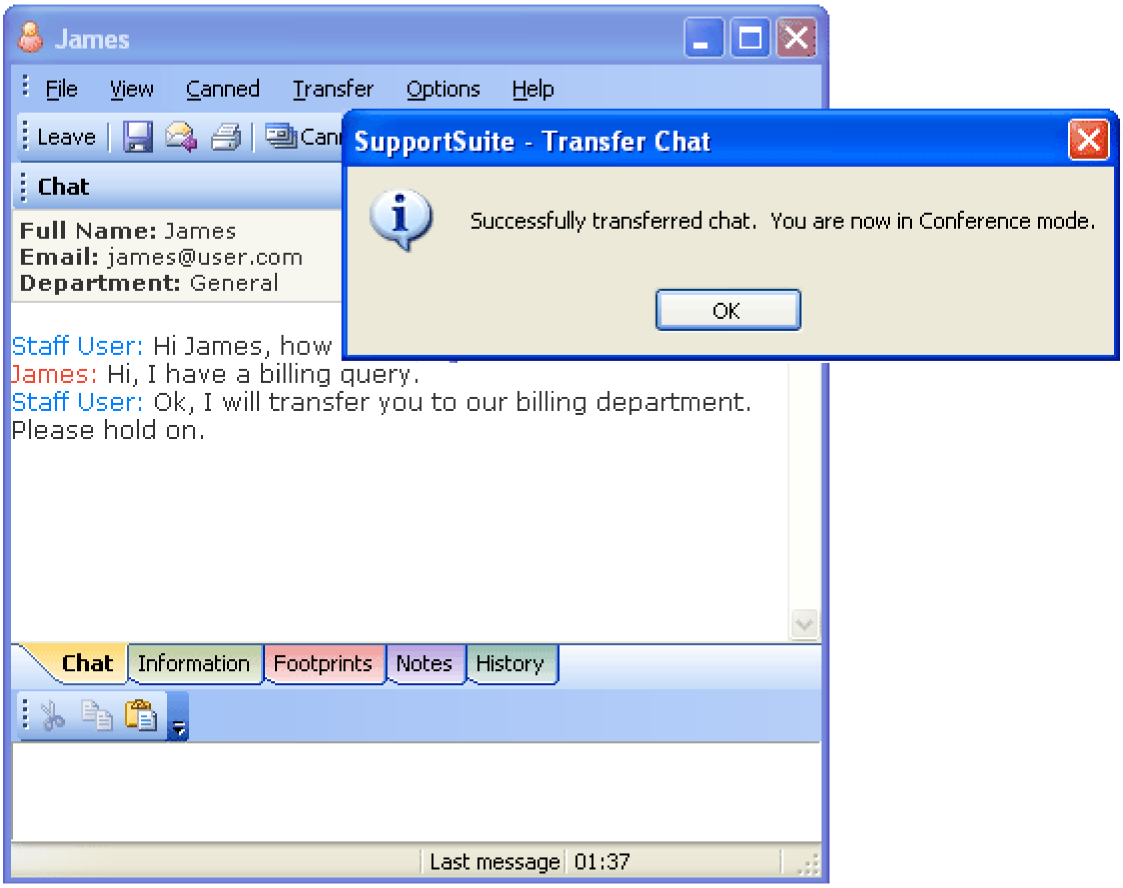
Transferring a chat

When in a chat session with a user, you can actively transfer the chat to another staff user. This will instantly open a new chat window on the staff user's Client Application (to who you are transferring to).

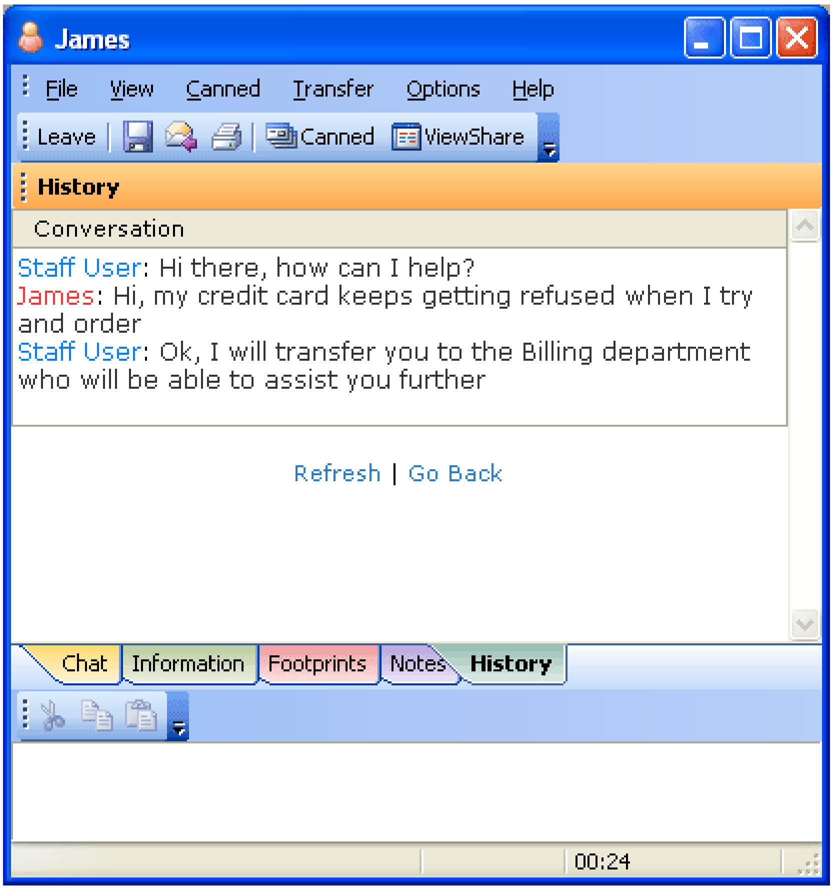
When a chat is transferred, the chat session will become a **conference** session. This means that both you and the staff user you transferred the chat to will be in the chat session with the visitor. The procedure is exampled below.

To transfer the chat, click on the **Transfer** menu (as shown below) and select the staff user to who you want to transfer the chat.


James
File View Canned Transfer Options Help
Leave
Another Staff
Chat
Full Name: James
Email: james@user.com
Department: General
Staff User: Hi there, how can I help?
James: Hi, my credit card keeps getting refused when I try and order
Staff User: Ok, I will transfer you to the Billing department who will be able to assist you further
Chat Information Footprints Notes History
Last message 00:56
Available staff users are listed here.

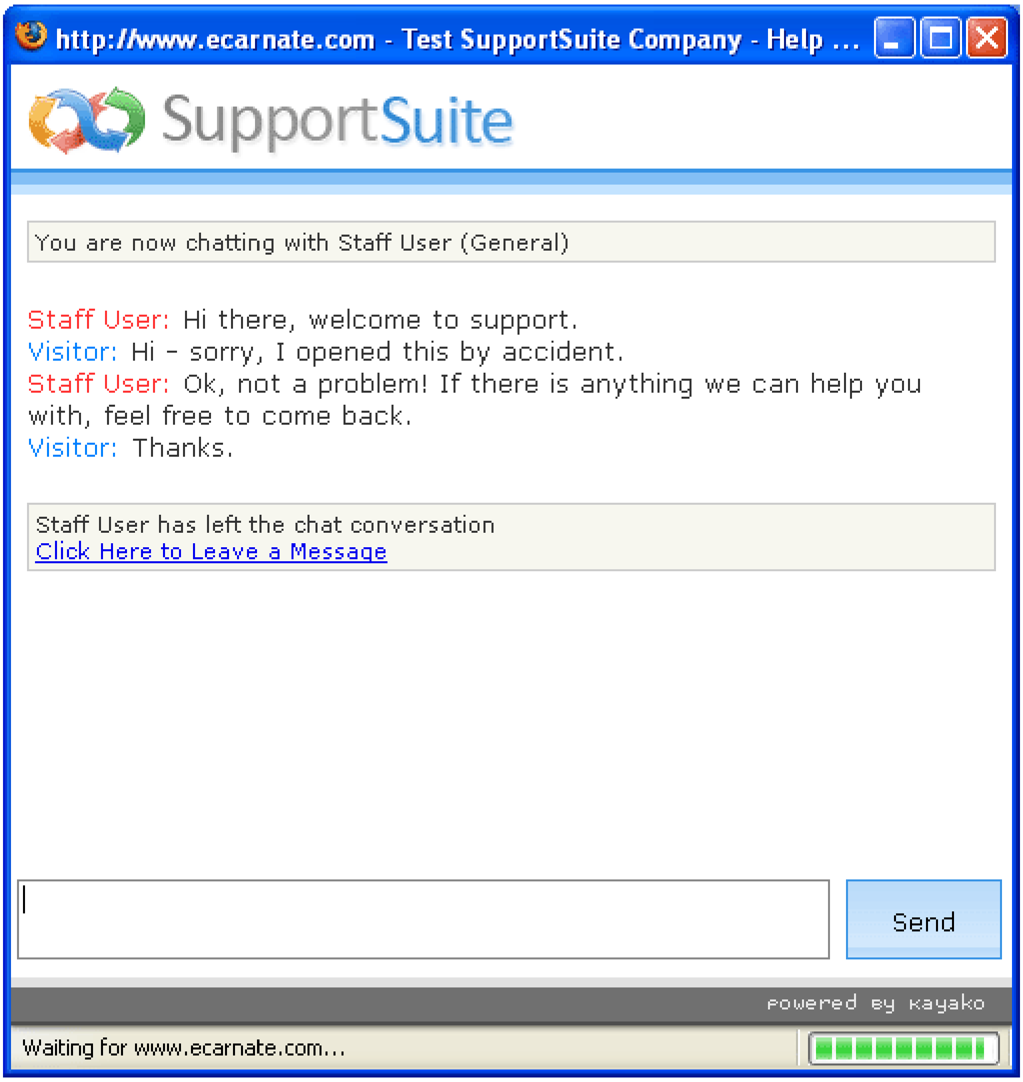

James
File View Canned Transfer Options Help
Leave
Chat
Full Name: James
Email: james@user.com
Department: General
SupportSuite - Transfer Chat
Successfully transferred chat. You are now in Conference mode.
OK
Staff User: Hi James, how
James: Hi, I have a billing query.
Staff User: Ok, I will transfer you to our billing department. Please hold on.
Chat Information Footprints Notes History
Last message 01:37

A new window will open up on the desktop of the staff user to who you transferred the chat to. The chat window will be empty. However, the staff user receiving the transfer can review the transcript by clicking on the **History** tab, as shown below.

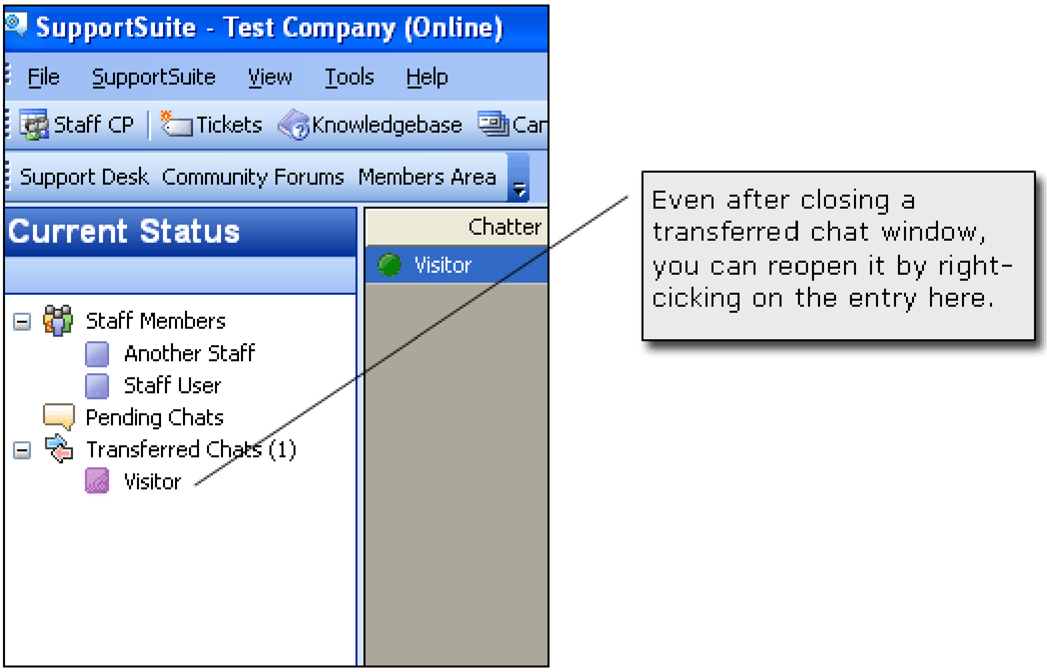


As described earlier, when a chat is transferred it becomes a **conference** - you (as the transferring staff user) will still be present in the chat session in a conference mode, meaning both you and the staff user who you transferred the chat to can chat with the visitor.

You can also leave the conference at any time, by closing your window or clicking on the **Leave** button. When you leave a conference, the visitor will be notified as such (as shown below).

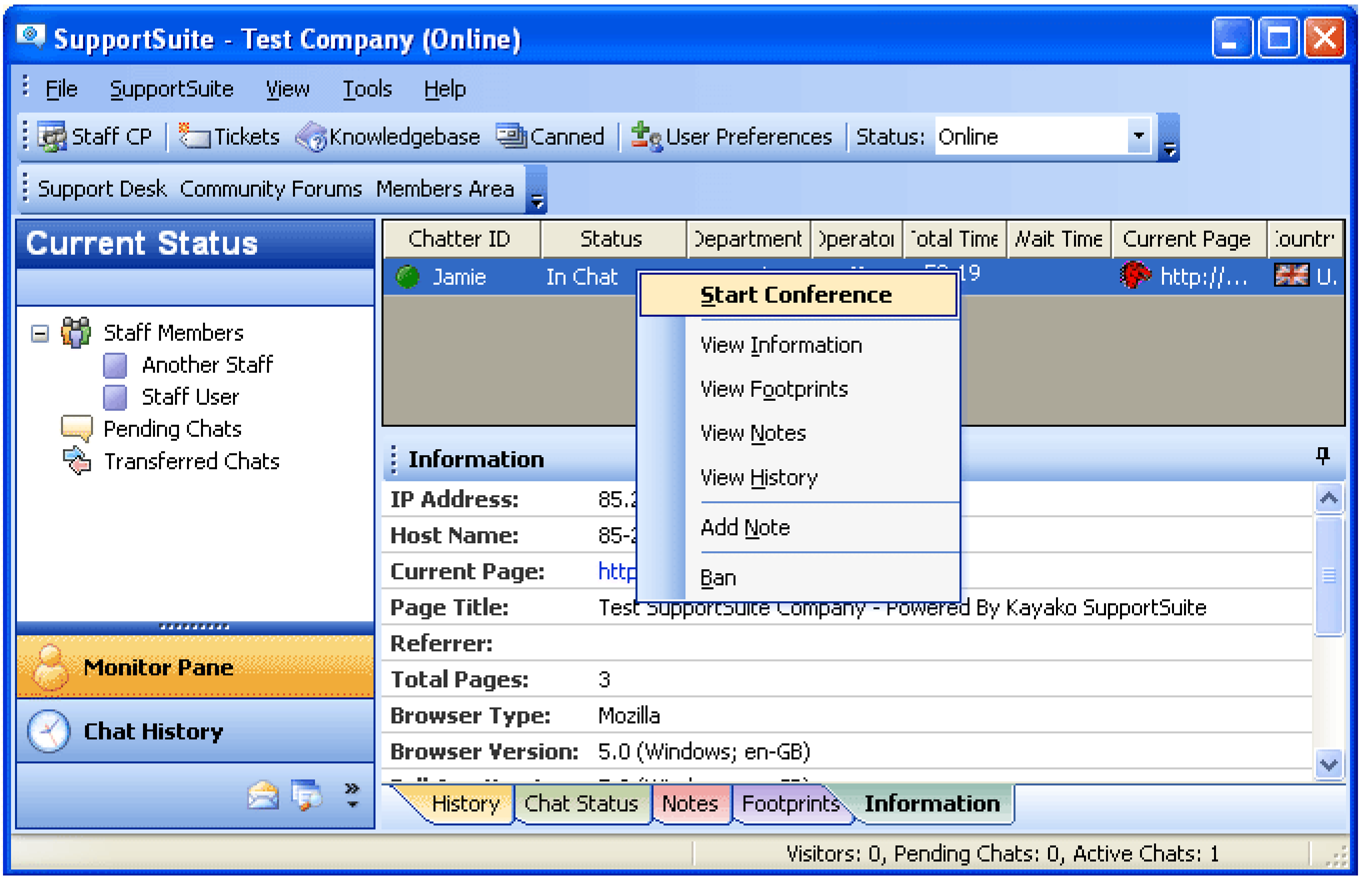


Transferred chat sessions are listed under **Transferred Chats** on the current status side bar, as shown below.

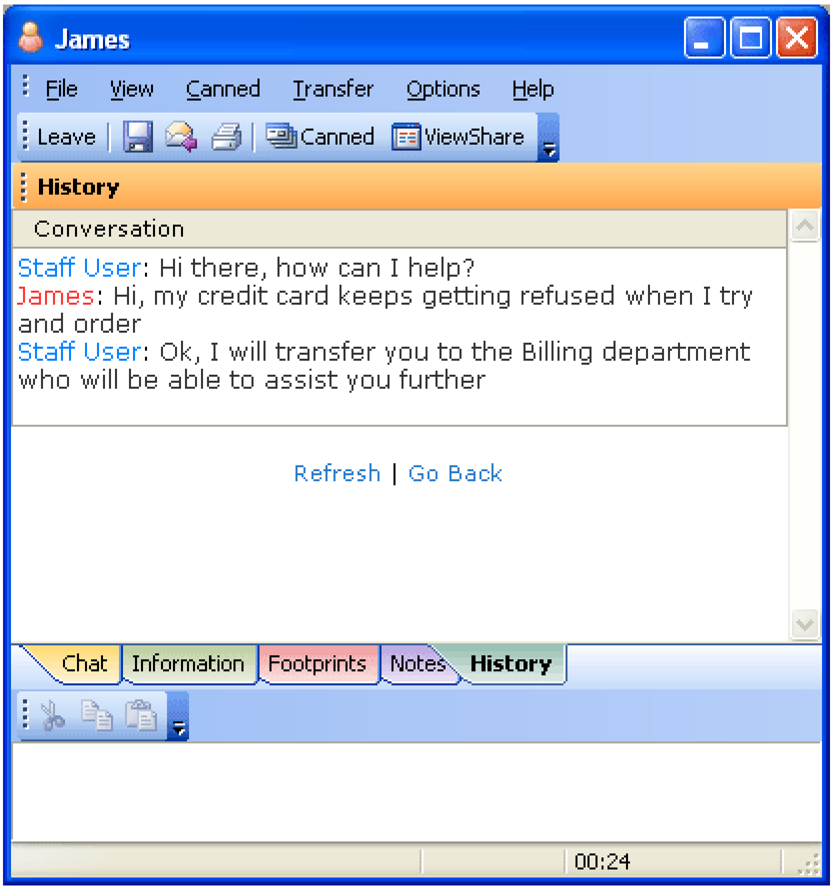


Starting or entering a conference

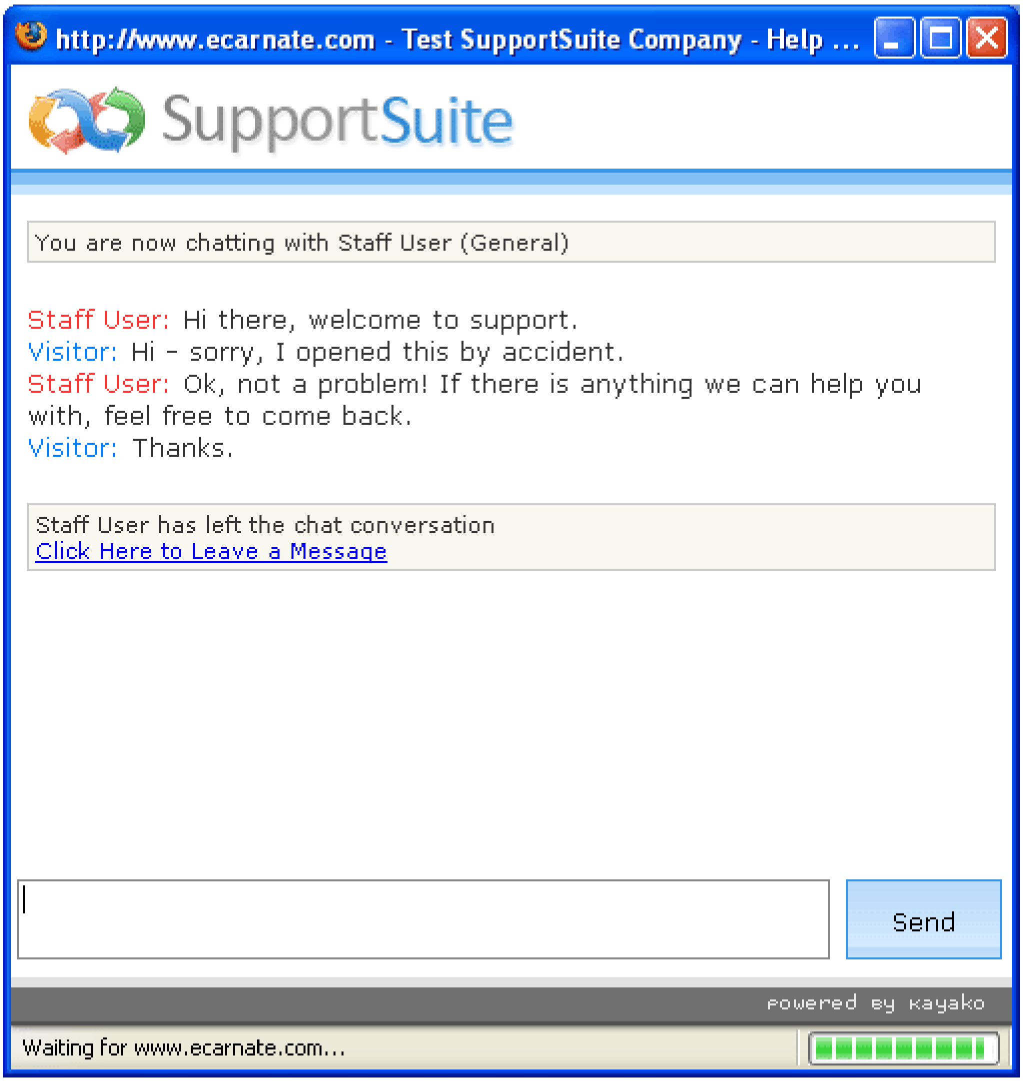
When a user is in a chat session with another staff user, you are able to start a **conference session** by right-clicking on this user within the monitor pane (as shown below) and clicking on **Start Conference**.



Your chat window will appear empty. You can review a transcript of the chat so far by clicking on the **History** tab, as shown below.



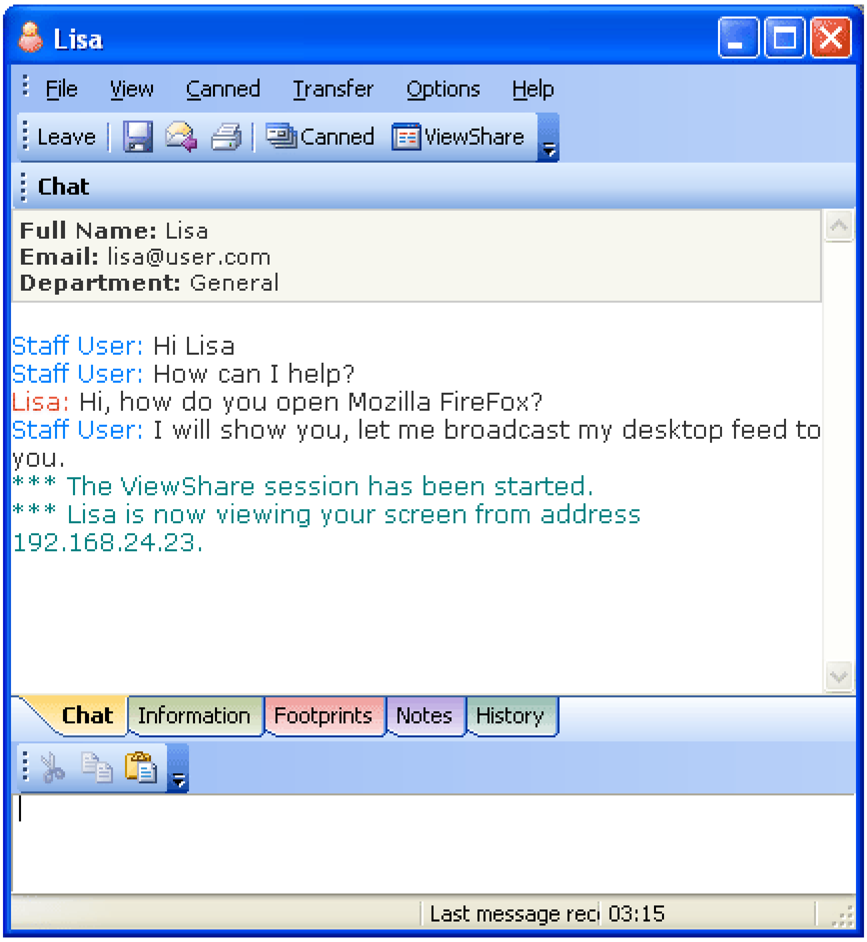
When you leave the conference (either by closing your chat window or clicking on the **Leave** button), the visitor will be notified as such, as shown below.



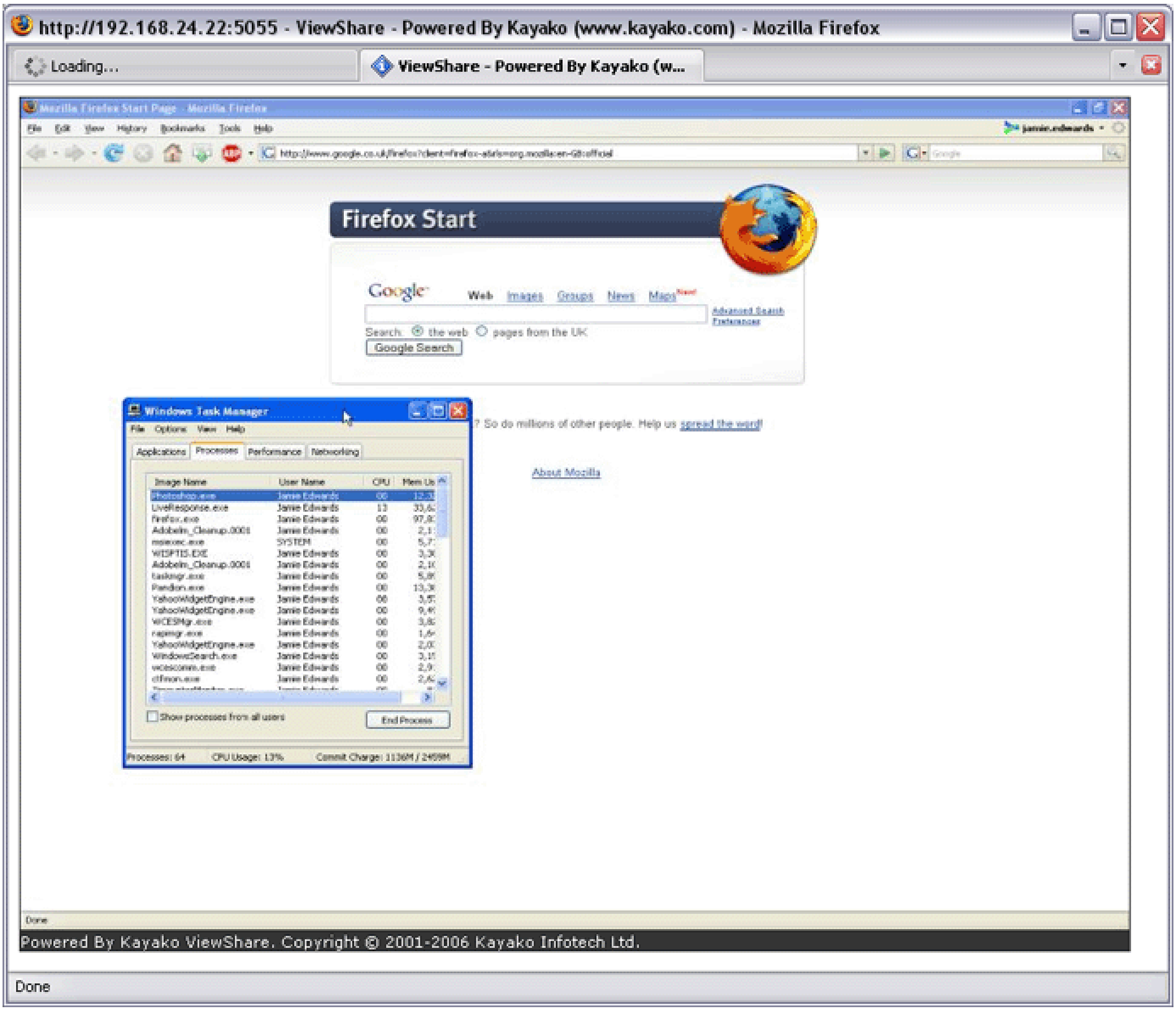
Please note that the conferencing functionality of the Client Application is not the best way to simply monitor a chat's progress. If you simply want to review a live transcript of a chat, click on the **History** tab within the monitor pane.

Starting a ViewShare session

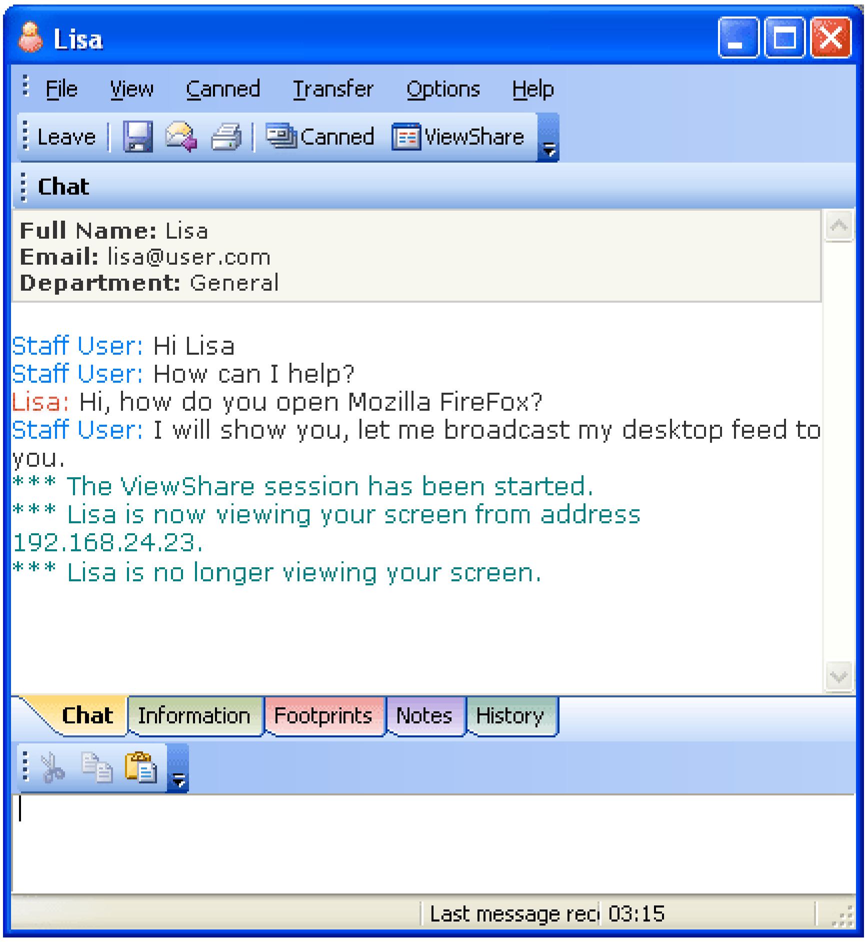
To launch a ViewShare session with a user, click on the **ViewShare** button as shown below.



You will be notified when the visitor is connected (shown above). Shown below is an example of the kind of feed the visitor sees.



When the visitor has closed his or her window of your desktop feed, you will also be notified as such, as shown below.

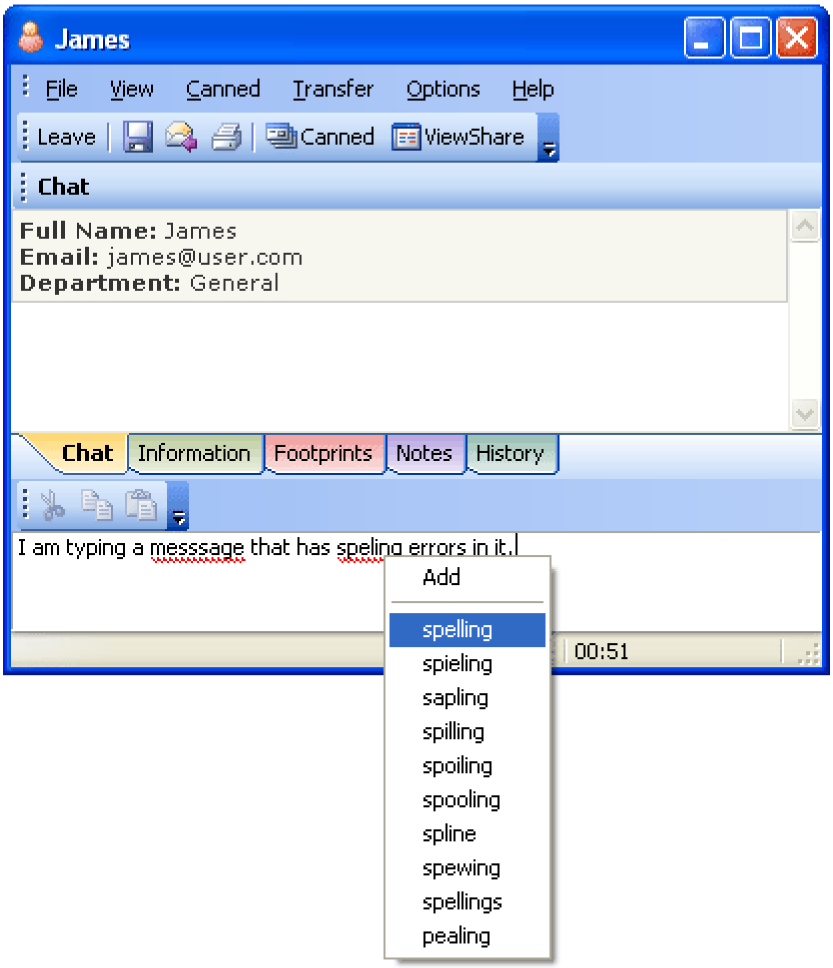


To end a ViewShare session from within the chat interface, click on the **ViewShare** button again.

Note that even though a user has ended their view of your desktop feed, the **connection** within the ViewShare server may still be active. For security reasons, use the ViewShare monitor to ensure the connection is closed (a visitor cannot connect to your ViewShare server without an active connection hash.

Spell checking features

If enabled, your typed input during a chat session is automatically spell checked. Any spelling errors are highlighted by a red underline, as shown below.



To view a list of suggested corrections for a highlighted word, right-click on the word and select from one of the suggestions. If the spelling is correct and you want to add it to the dictionary as a correct term, click on the **Add** menu option.

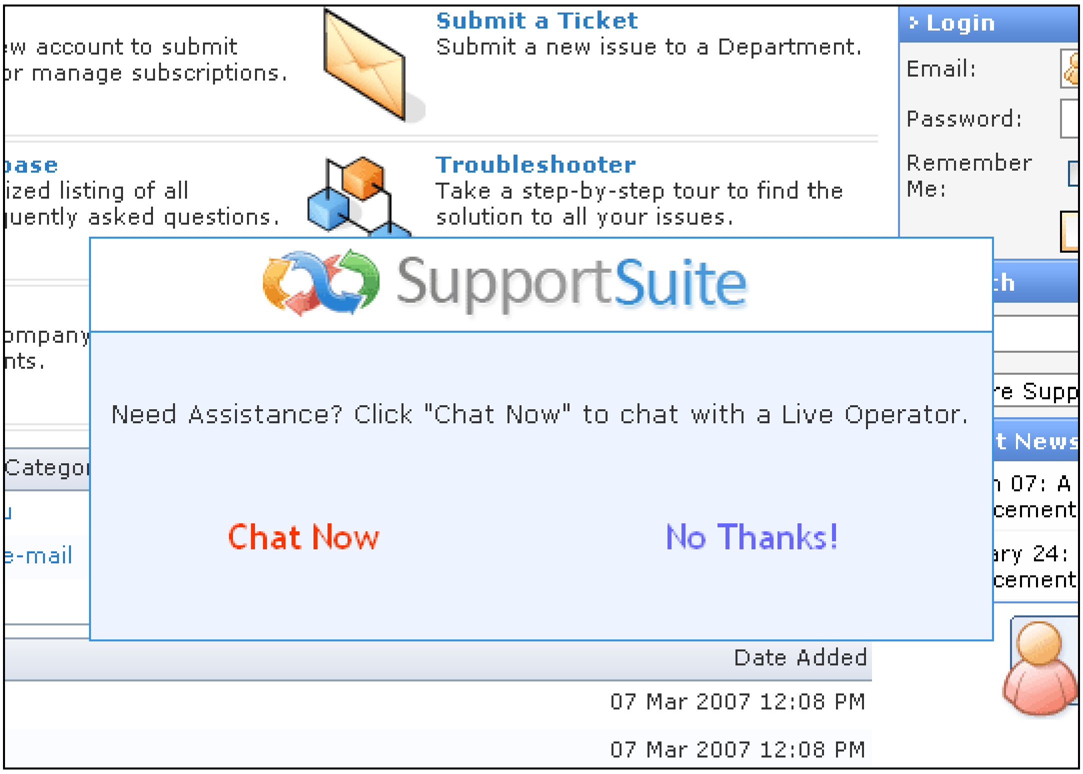
Spell checker options and dictionaries are configured and selected in the Client Application options area.

Making a proactive chat request

When a user is browsing your support desk and tagged web pages (see What is a "Tag"?), it is possible for a staff user to proactively make a chat request to that user.

A chat request can be **forced** or **requested**.

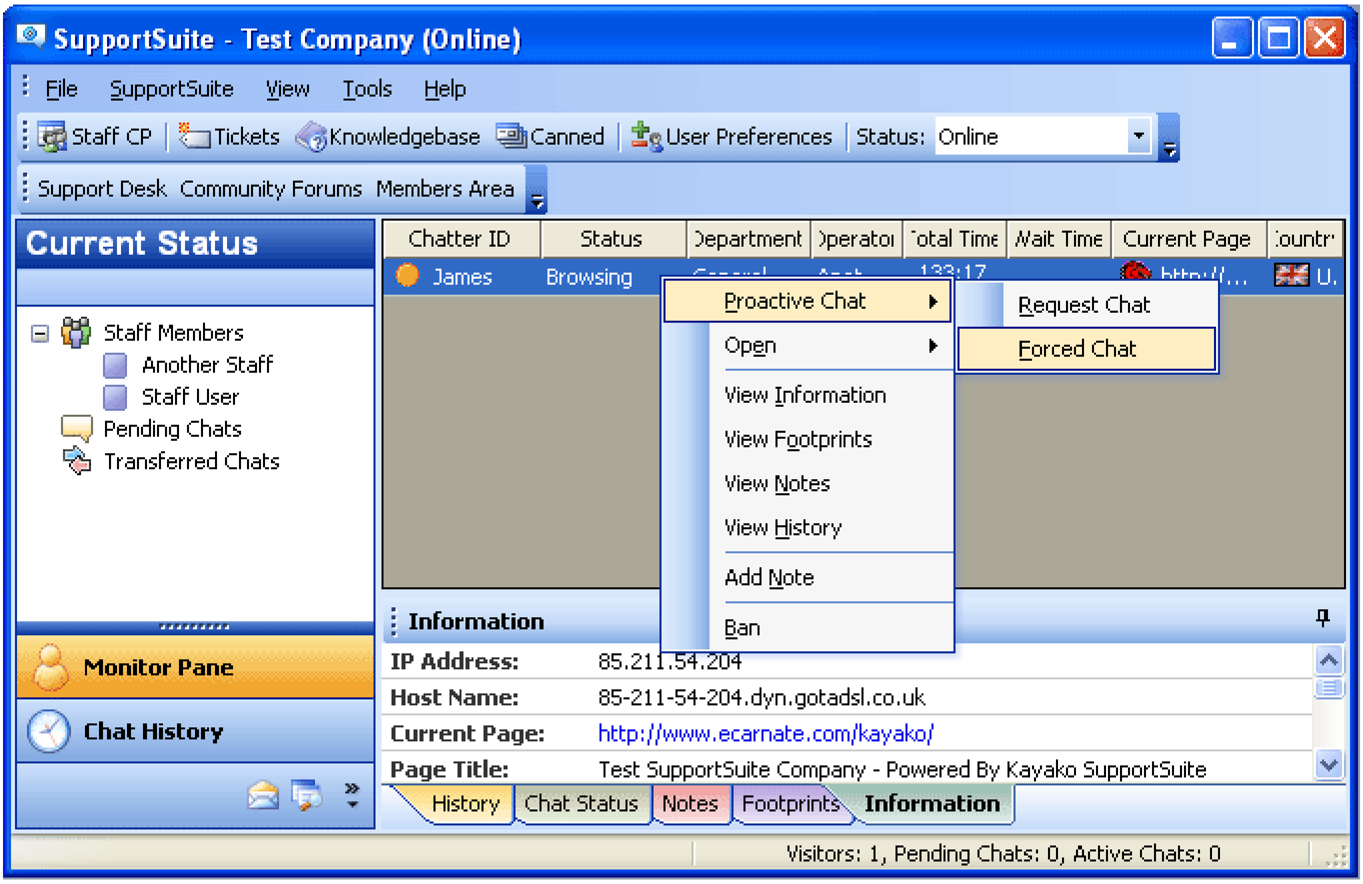
A forced chat request will instantly open a chat window and chat session for that visitor and for you (the requesting staff user). A requested chat session involves a dialog appearing on the visitor's web browser asking whether or not they would like to start a session, as shown below.



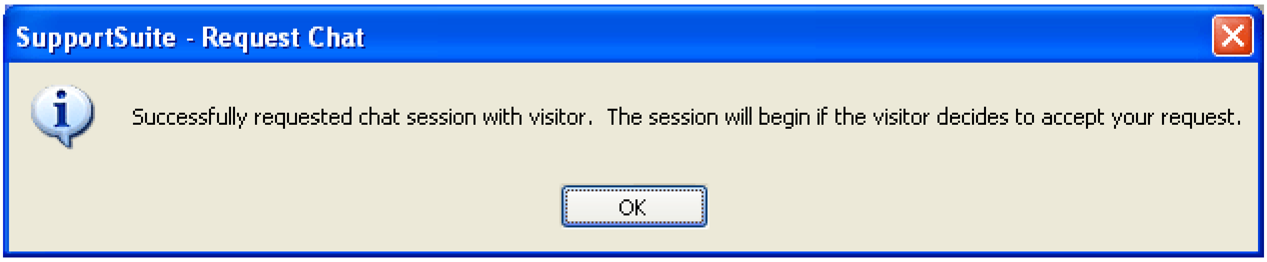
If a chat request is forced and the visitor is using a **popup blocker**, the forced chat request may not open and the visitor may not notice the request has been made.

However, if the chat request is **requested** (as shown above), a popup blocker will not block the popup as the request window is not made in a popup, but in a new layer on the web page.

Chat requests can be made from within the monitor pane, as shown below.



If the request has been processed successfully, you will receive the following notification.

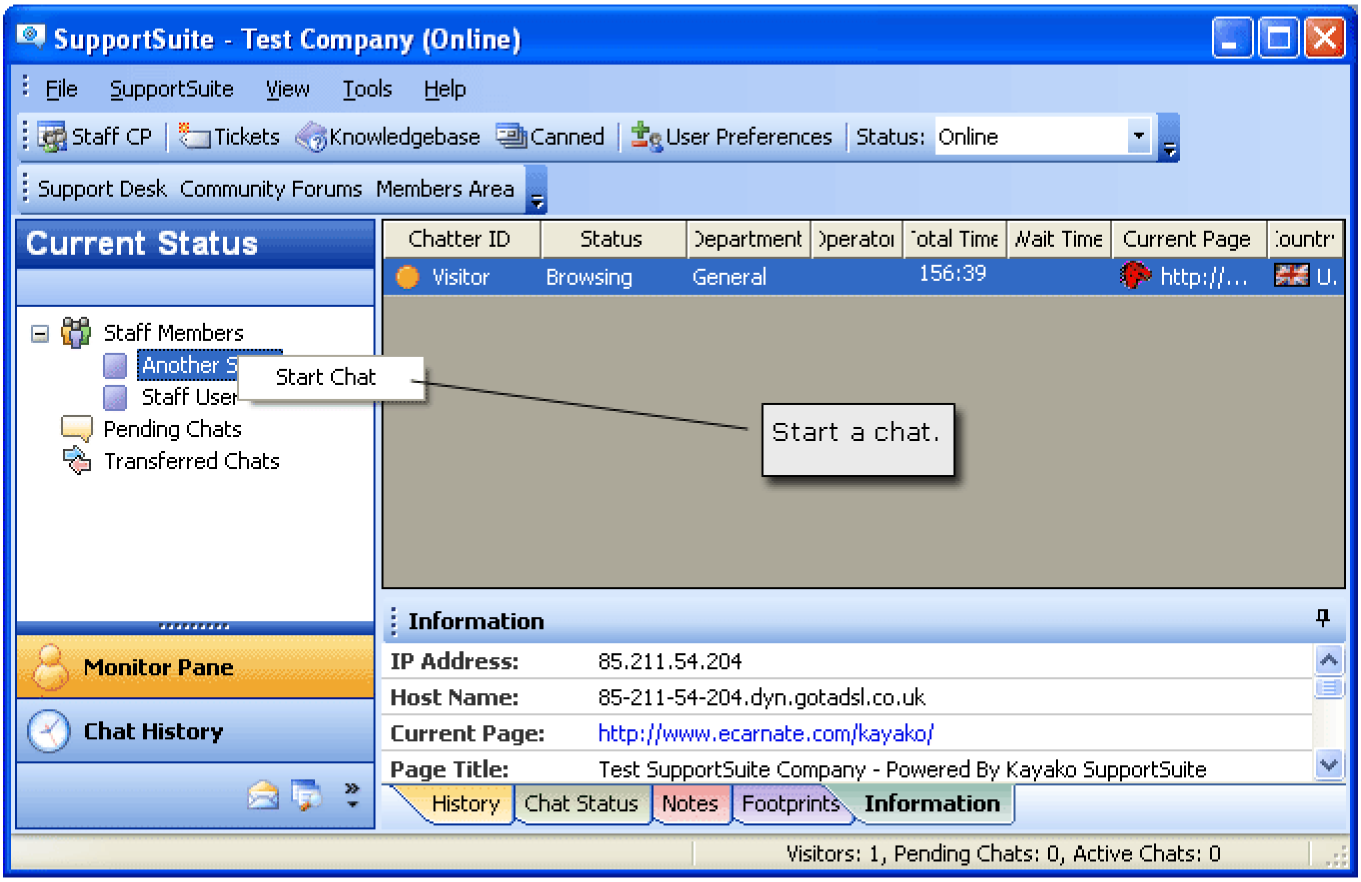


If the visitor rejects your chat request, you will not be directly notified of this. If the visitor accepts the chat request, the chat session will begin automatically.

Note that once a chat request has made, the site visitor has to reload their page or browse to another page that has been tagged in order for the notice to display (see What is a “Tag”?).

Staff-to-Staff chatting

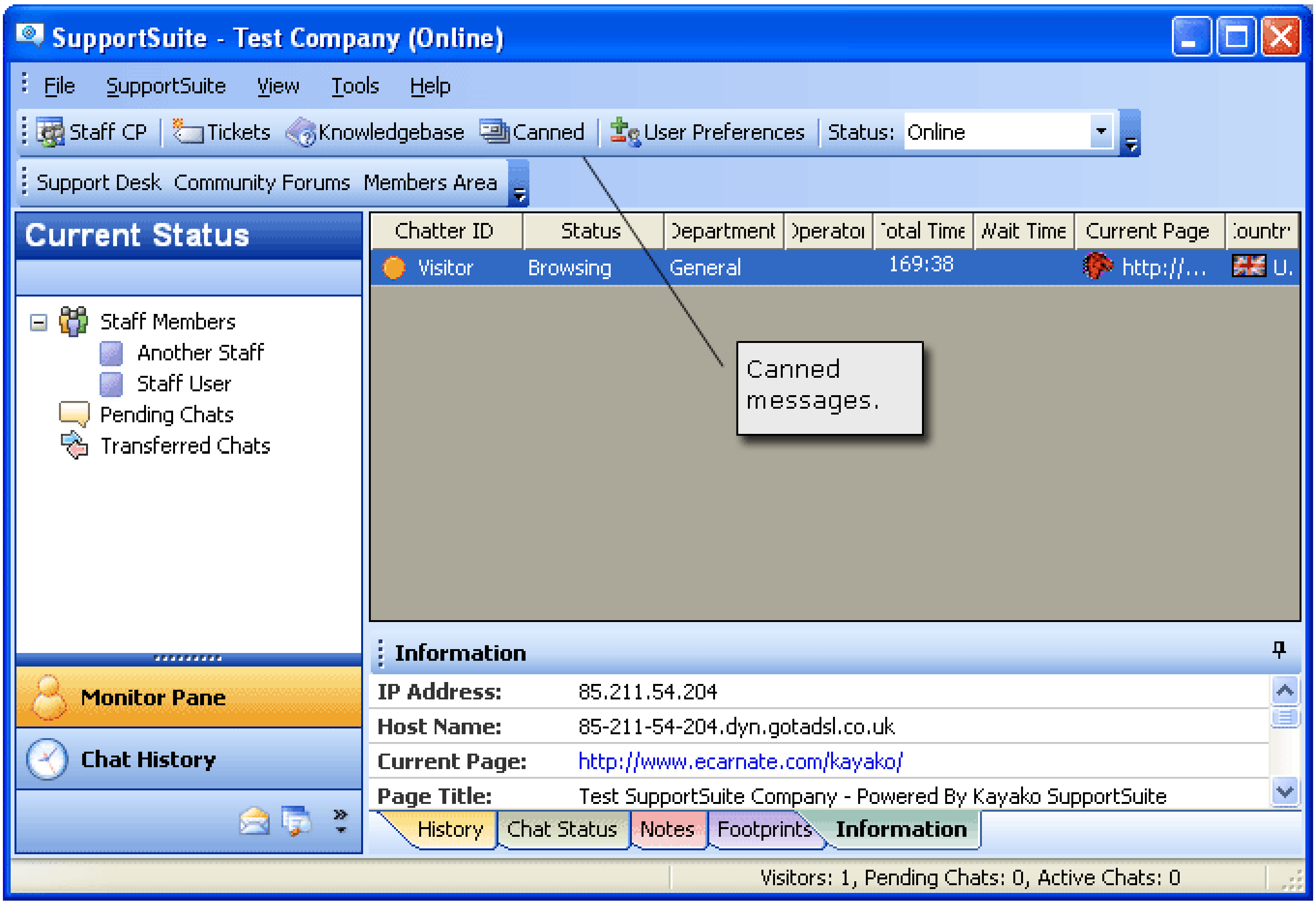
Using the Client Application chat interfaces, staff-to-staff chats can take place. Using the side-bar, right click on a staff user can click on **Start Chat**, as shown below.



Canned messages

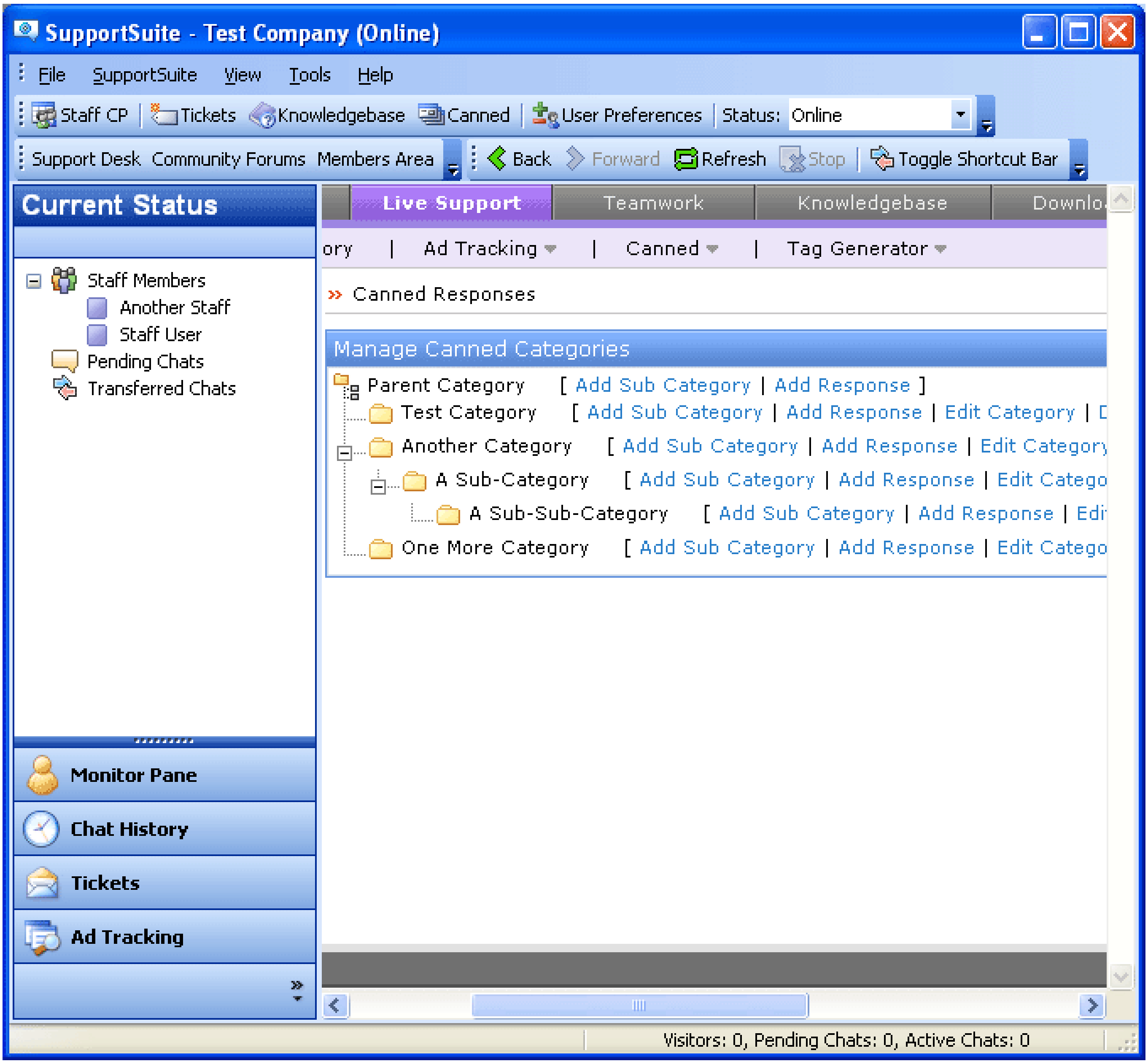
A canned message acts as a **predefined reply**, also referred to as a **standard reply**. It is a copy/paste message or message template that can be used to more efficiently handle a support load.

To view and manage canned message responses, click on the **canned** button on the menu bar, as shown below.



Within the application, an interface to your SupportSuite or LiveResponse installation will be opened, from which you can manage the canned message responses and categories.

Full documentation for managing **canned** messages within SupportSuite and LiveResponse are available in the **staff control panel** manual.



New canned message categories and messages will **not** be populated into your Client Application until you log in and out of the server.

Using canned messages

The procedure for using canned messages within a chat session is described in using canned messages.

Visitor messages

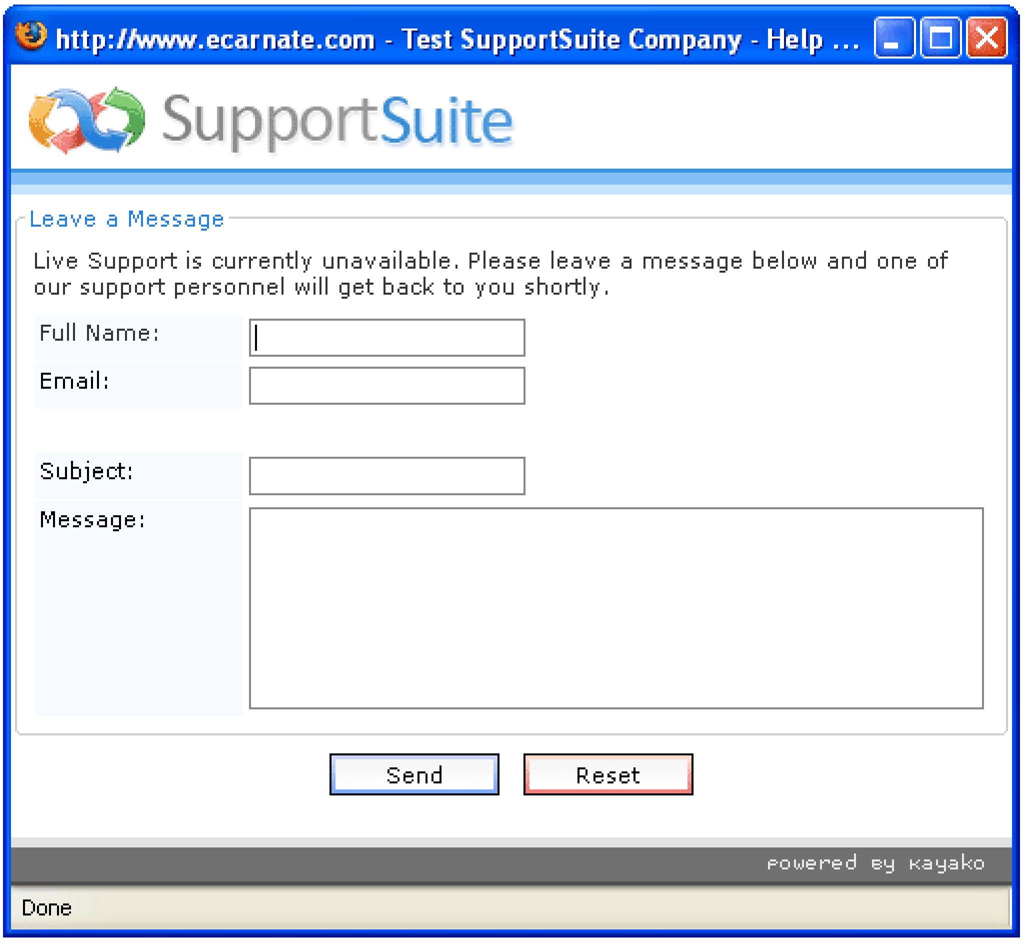
A **visitor message** is a message that is left by a visitor who:

1. Has attempted to request live chat, but no one was available.

2. A had completed an ended chat session, and was offered the option of leaving a message.

Messages left by a visitor are **not** the same as tickets – they work different and are stored in a different location.

As shown below, the form the visitor uses to "leave a message".

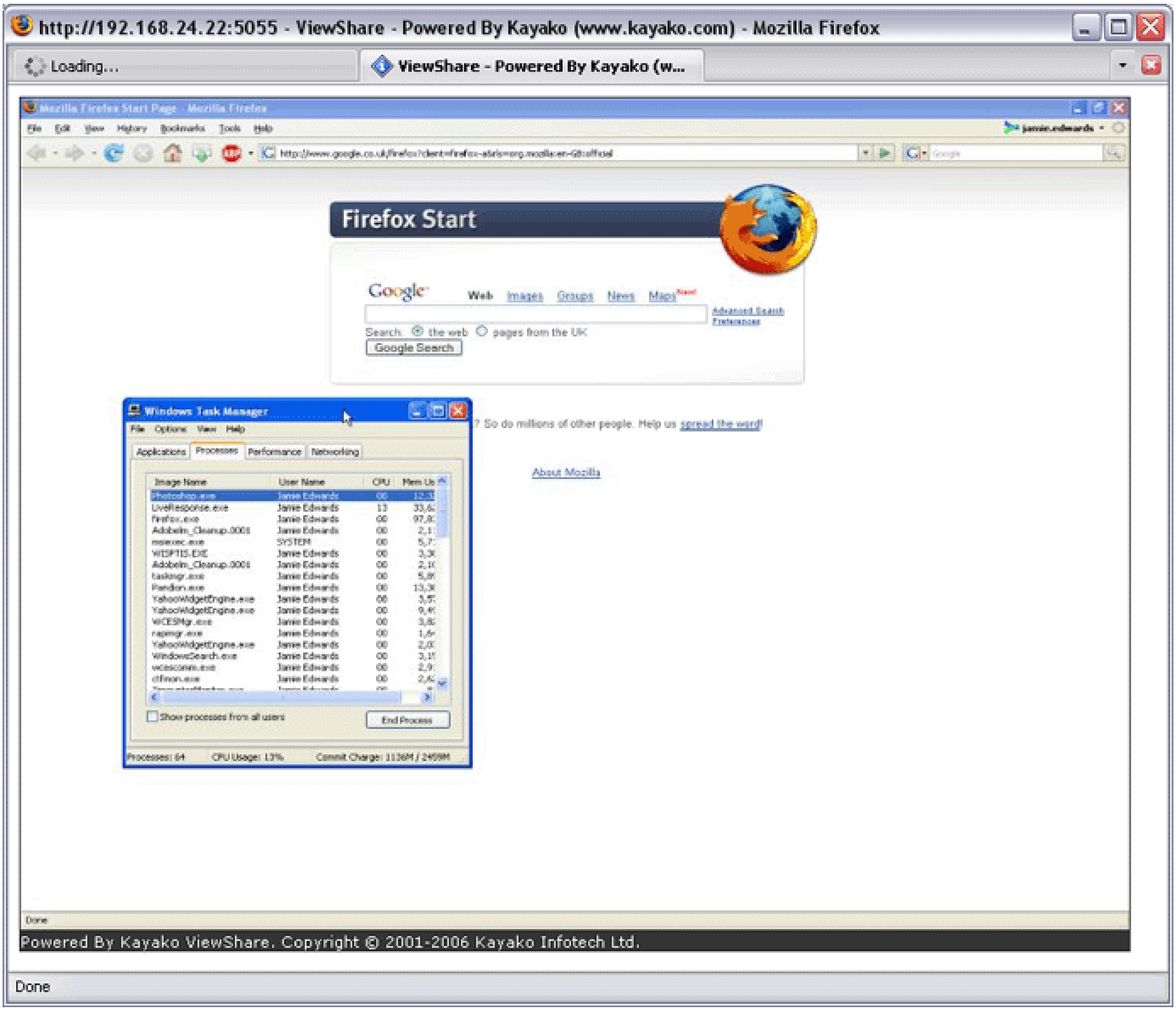


Messages can be reviewed and responded to under the **Live Support** section of the **staff control panel** (in SupportSuite or LiveResponse). Full documentation of the visitor messages management is provided in the staff control panel manual.

ViewShare

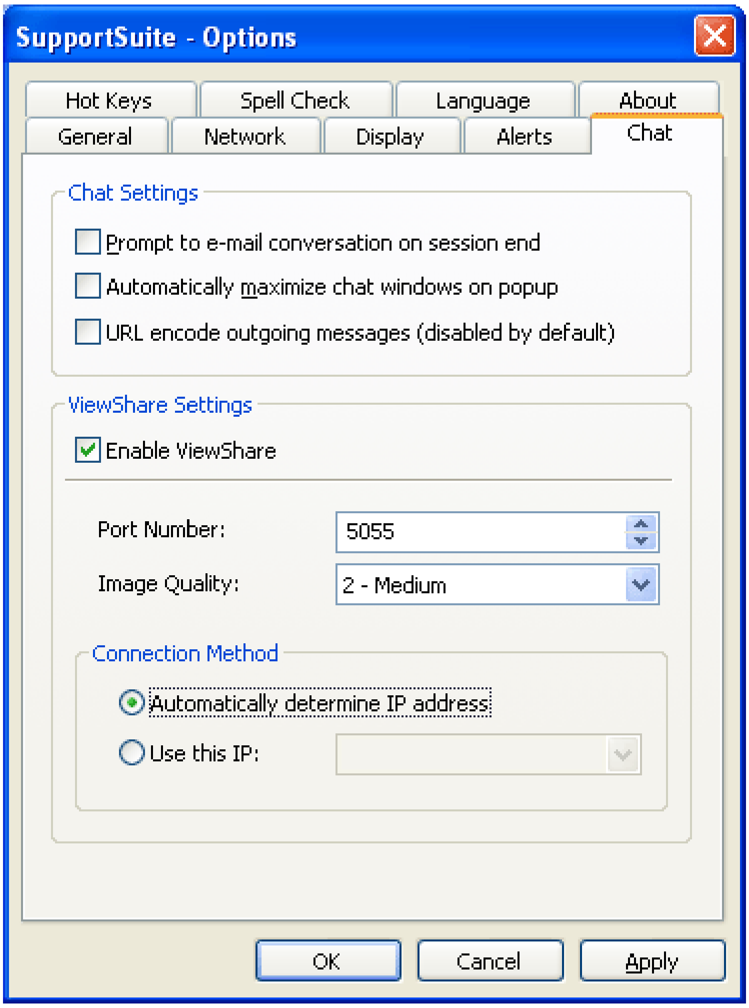
The **ViewShare** component of the Client Application allows you to broadcast a direct feed of your desktop to a site visitor from within a chat session. On the client end, the broadcast is entirely browser based and powered by JavaScript, so the visitor does not need to download anything.

An example of a client's view of a desktop feed is shown below.



Setting up ViewShare

ViewShare can be configured within the Client Application options dialog (Tools > Options > Chat).



ViewShare Settings

- **Enable ViewShare** – in order to be able to use ViewShare, this box must be checked.
- **Port Number** – the port number through which visitors will connect to your ViewShare process on your computer.
- **Image Quality** – the quality of the broadcast image. The higher the quality, the higher your upload bandwidth should be (it is unlikely the visitor will be bottlenecked by a bandwidth too low).

Connection Method

1. Automatically determine IP address – this is best left set to default. However, if you're your visitors are experiencing problems connecting, manually enter your **external** IP address under **Use this IP**.

Using ViewShare in a chat

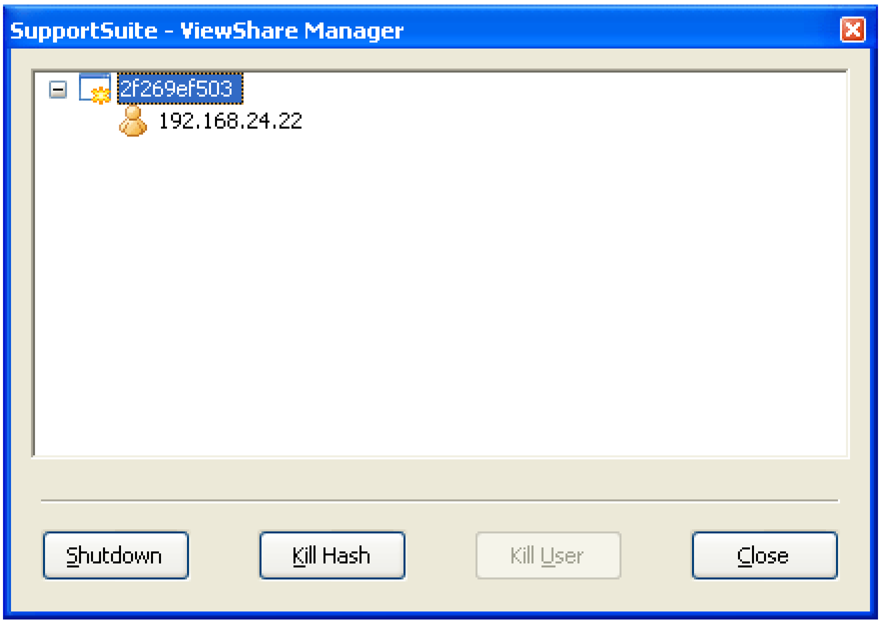
The procedure for using ViewShare within a chat session is described in starting a ViewShare session.

ViewShare monitor

The **ViewShare monitor** displays all current and active ViewShare connections to your Client Application.

To open the ViewShare monitor:

1. Open the **SupportSuite** menu.
2. Click on the **ViewShare Monitor** menu option.



To close a connection, select the connection **hash** and click the **Kill Hash** button. The **Shut Down** button will shut down the ViewShare server for your Client Application. Without an active connection hash, a user cannot connect to your ViewShare server.

Staff statuses

A staff user can have the following **statuses**:

2. Online
3. Offline
4. Be back shortly
5. Away

A staff user can also have a status of **Busy** – but this status cannot be manually set, and is used internally only when a user is handling **the maximum number** of chat requests (this number is configured under general options).

When staff are available (not busy and are all **online**), the live support status icon will display as below:

When all staff users are **offline**:

If some staff users are online but their status is accumulatively set to **away**:

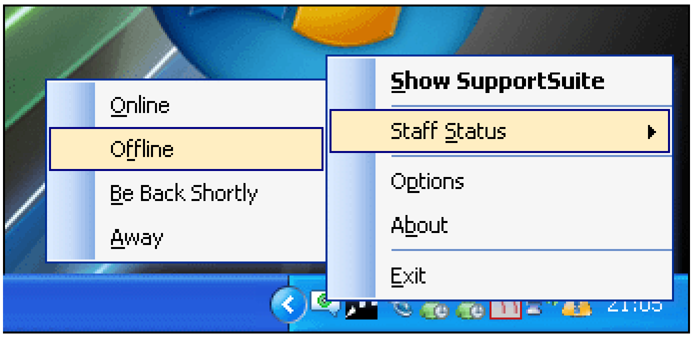
If some staff users are online but their status is accumulatively set to **be back shortly**:

Users set to any status other than **Online** will not receive new chat requests.

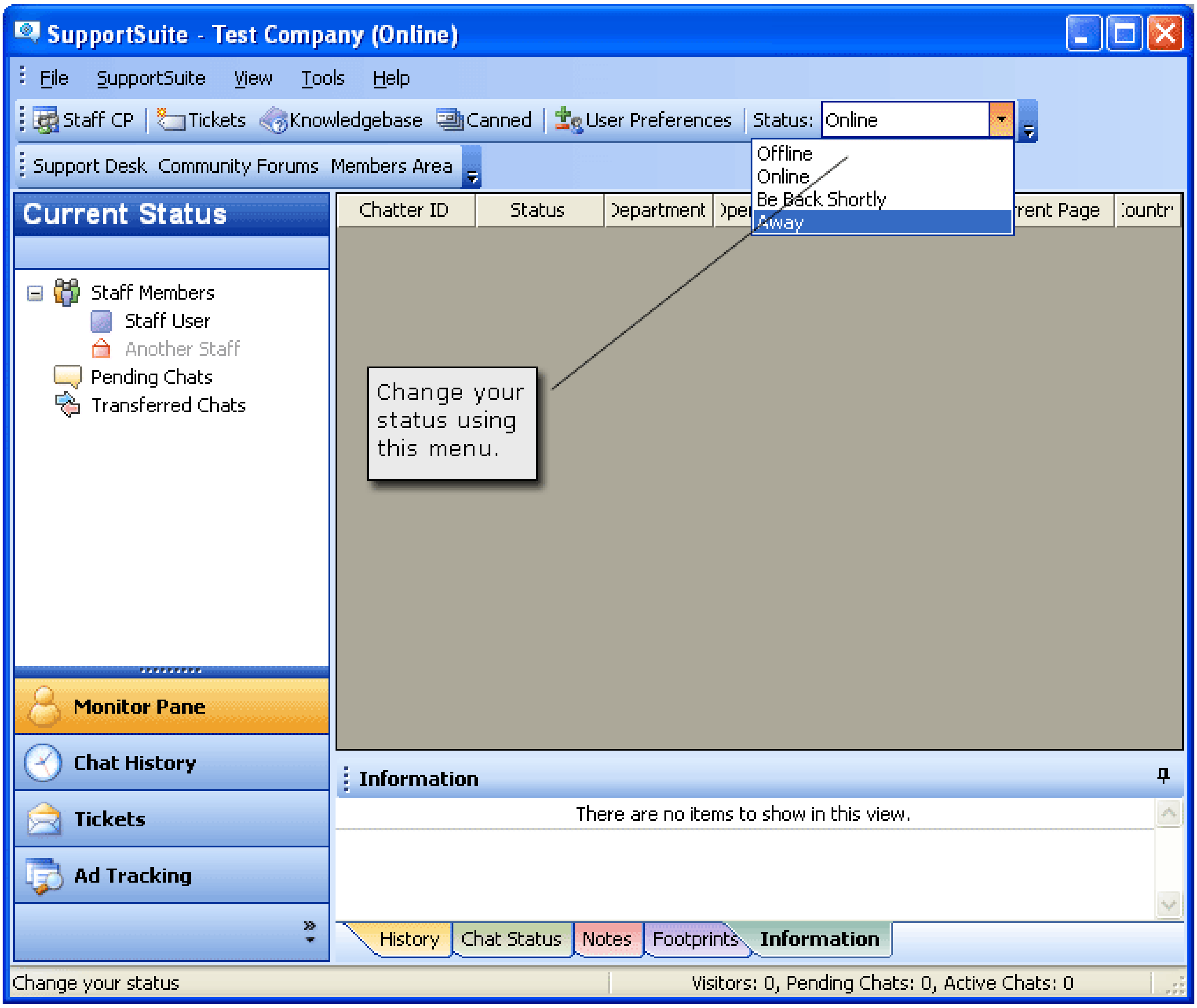
Changing status

Your status can be changed from the **system tray icon** or from within the application interface.

To change your status from the system tray, right click on the Client Application icon and select your status, as shown below.



To change your status from within the application, change your status using the menu shown below.


SupportSuite - Test Company (Online)
File SupportSuite View Tools Help
Staff CP Tickets Knowledgebase Canned User Preferences Status: Online
Offline
Online
Be Back Shortly
Away
Support Desk Community Forums Members Area
Current Status
Staff Members
Staff User
Another Staff
Pending Chats
Transferred Chats
Chatter ID
Status
Change your status using this menu.
Monitor Pane
Chat History
Tickets
Ad Tracking
Information
There are no items to show in this view.
History Chat Status Notes Footprints Information
Change your status
Visitors: 0, Pending Chats: 0, Active Chats: 0

Visitor banning

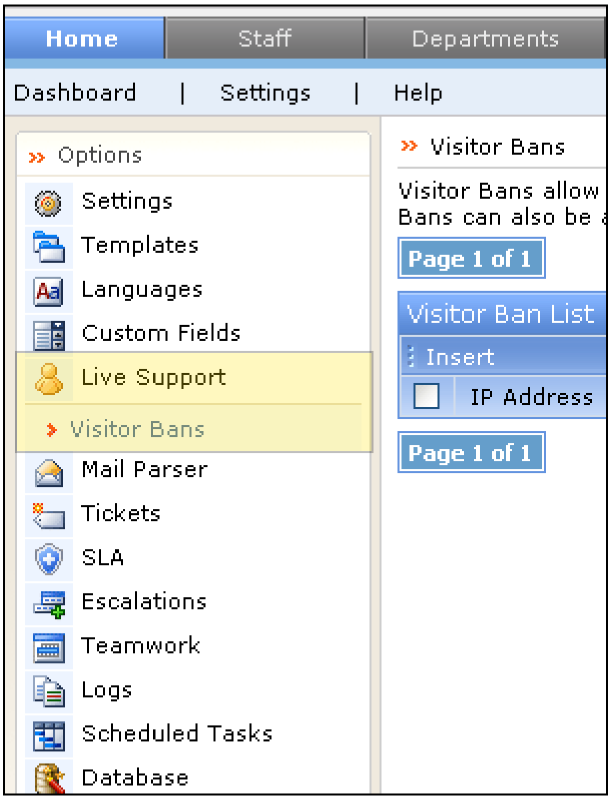
A visitor can be **banned** by IP through the monitor pane or from directly within a chat session's window.

When a visitor is banned, he or she will not be able to see the live support status icon. The visitor will also no longer appear within the **monitor pane** (the visitor will no longer be tracked).

Bans are enforced according to the visitor's IP address. Therefore, if the visitor returns with a different IP address, he or she will be able to **evade the ban**.

Removing and managing visitor bans

Visitor bans are managed using the **administrator control panel** (under the **Live Support** menu, as shown below).

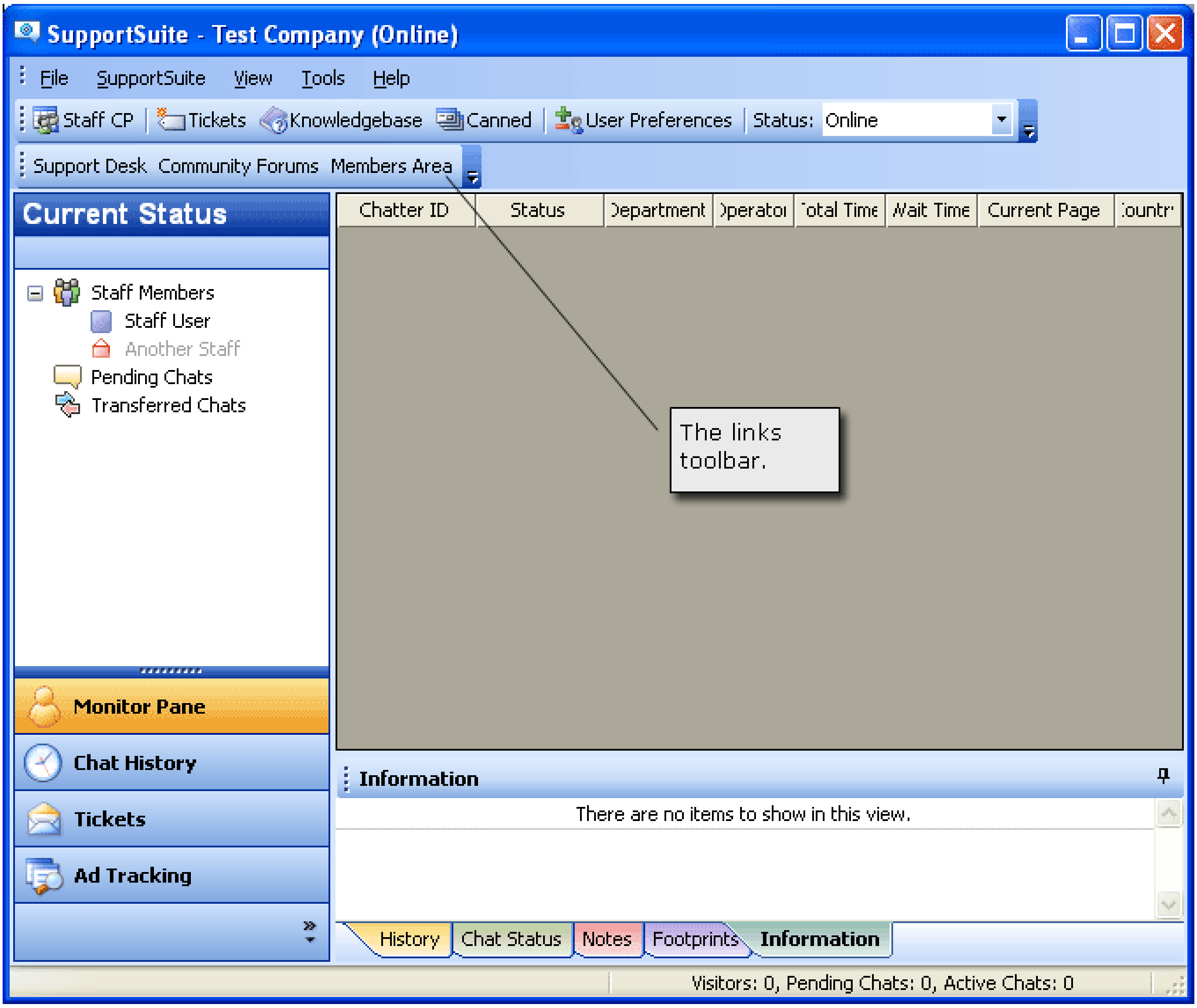


Links toolbar

The links bar is a bar of labeled URLs that can be opened within the Client Application.

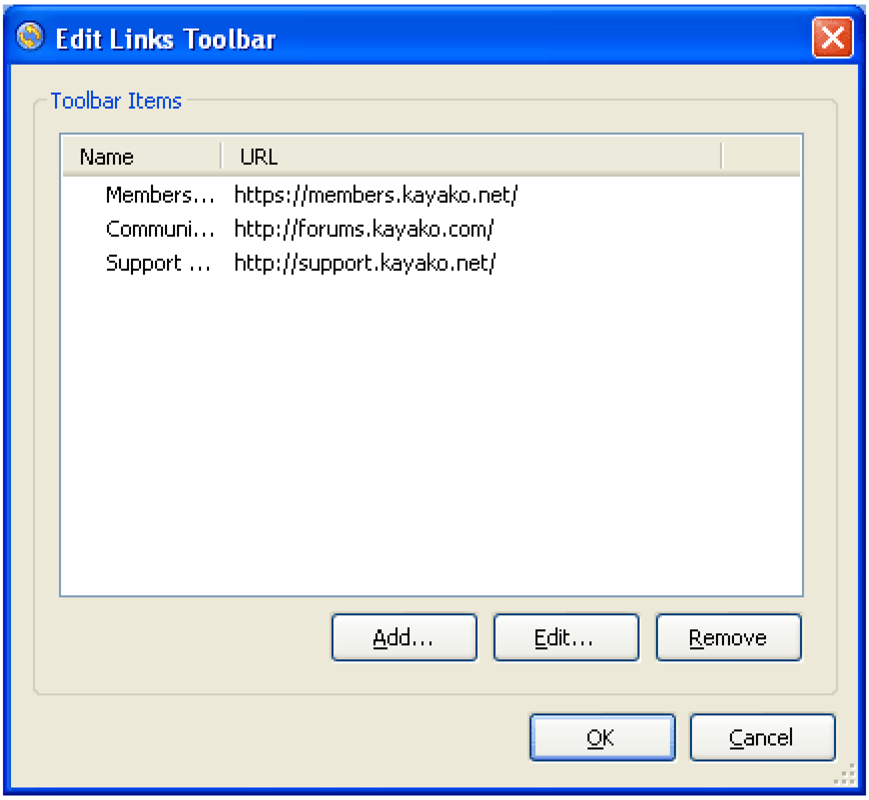
To display the links bar:

1. Click on the **View** menu.
2. Hover over **Toolbars**.
3. Click on the **Links** menu option (if unchecked).



The links on the links toolbar can be customized. To customize them:

1. Open the **Tools** menu.
2. Click on the **Links Toolbar** menu options.

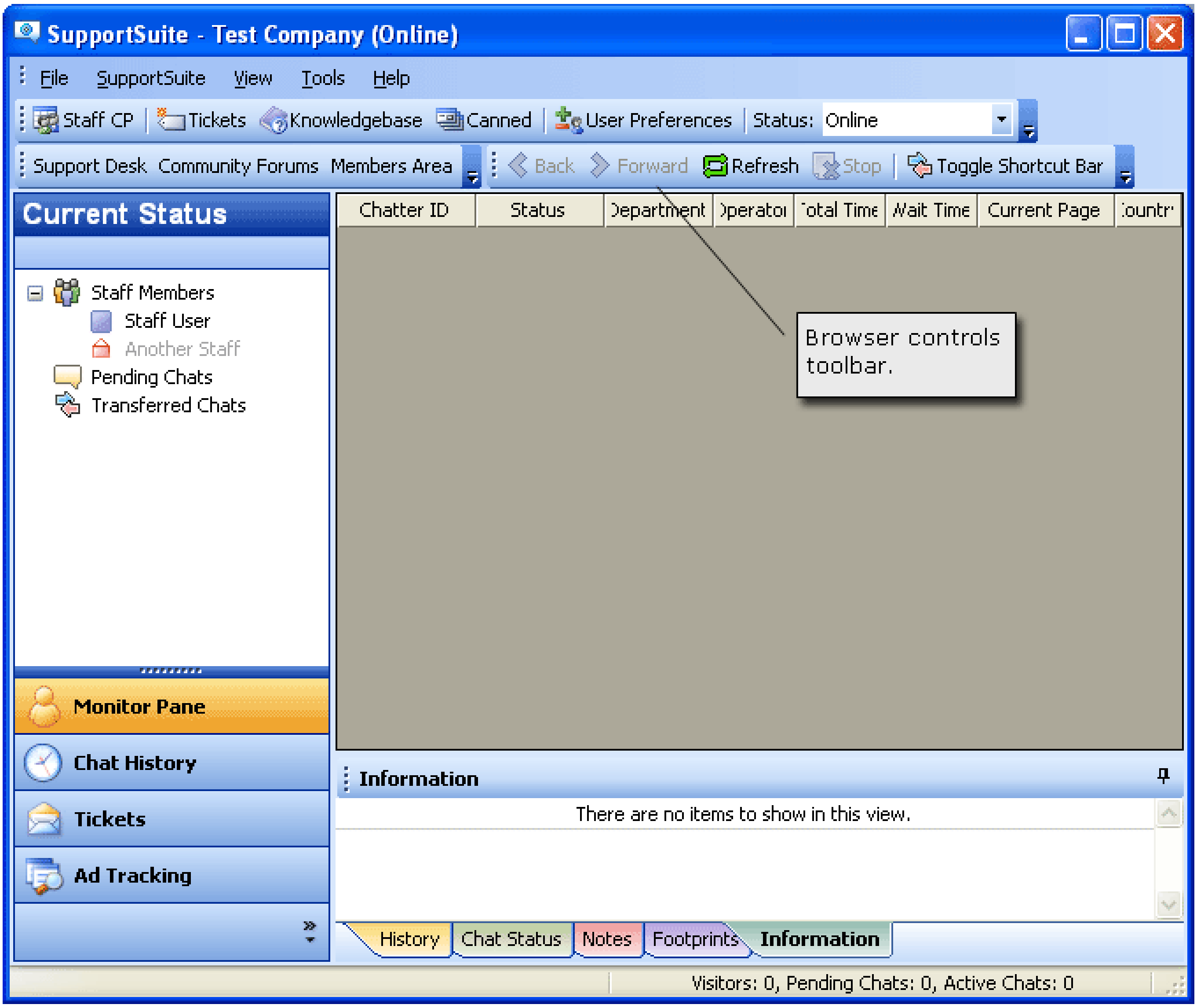


From this window, you can add, remove and modify existing link items.

Web pages loaded within the Client Application can be navigated around using the browser controls toolbar.

Browser controls

The **browser controls** toolbar is a toolbar consisting of a **back**, **forward**, **refresh** and **stop** browser controls, as shown below.

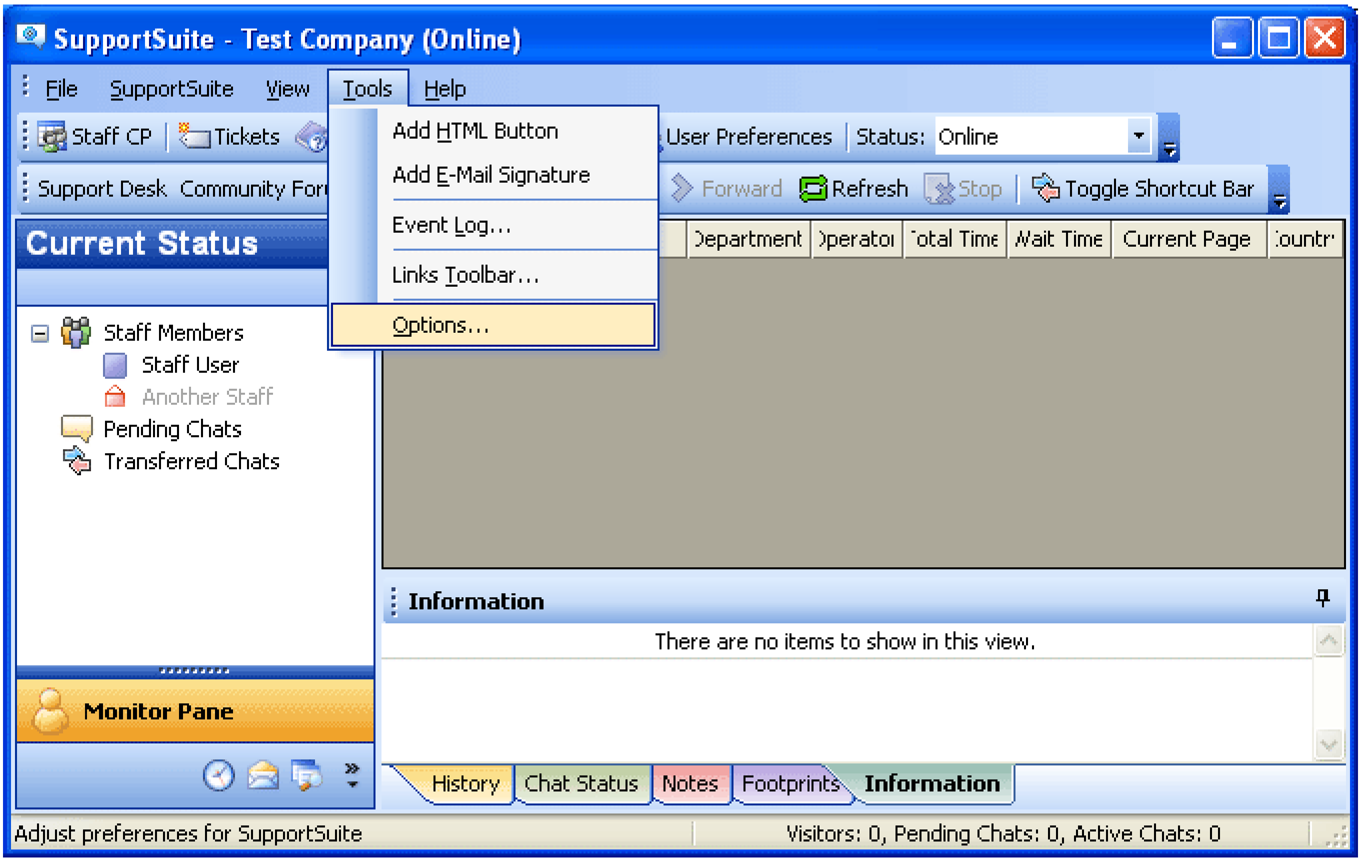


Options and configuration

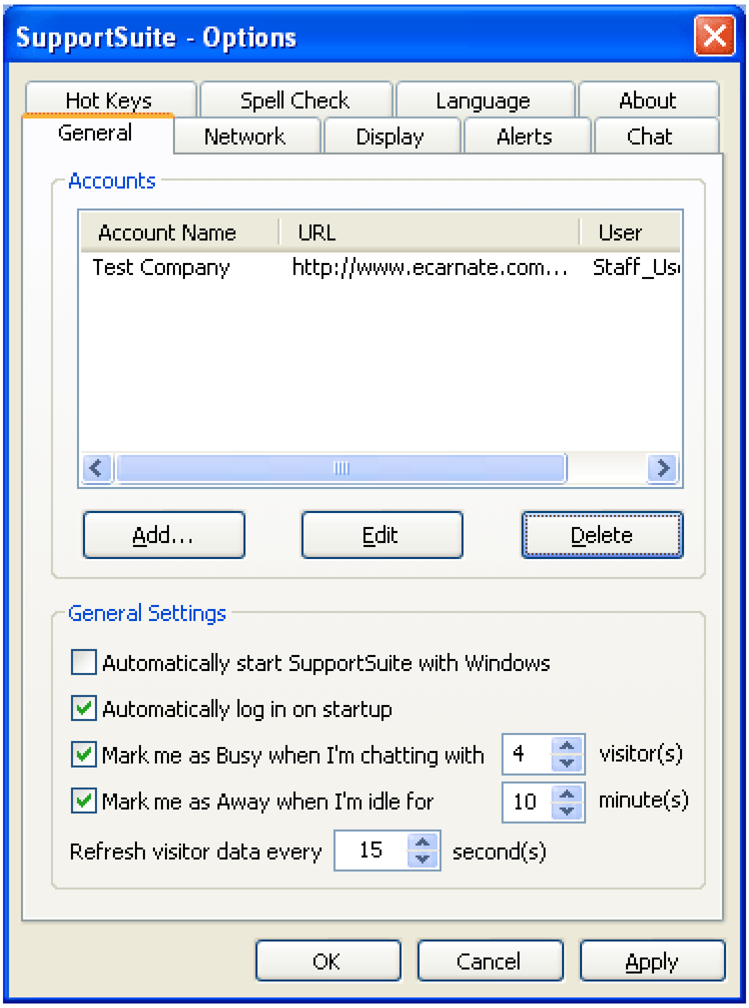
All of the Client Application's core configuration can be made within the options dialog. To access the options dialog:

1. Open the **Tools** menu.

2. Click on the **Options** menu option.

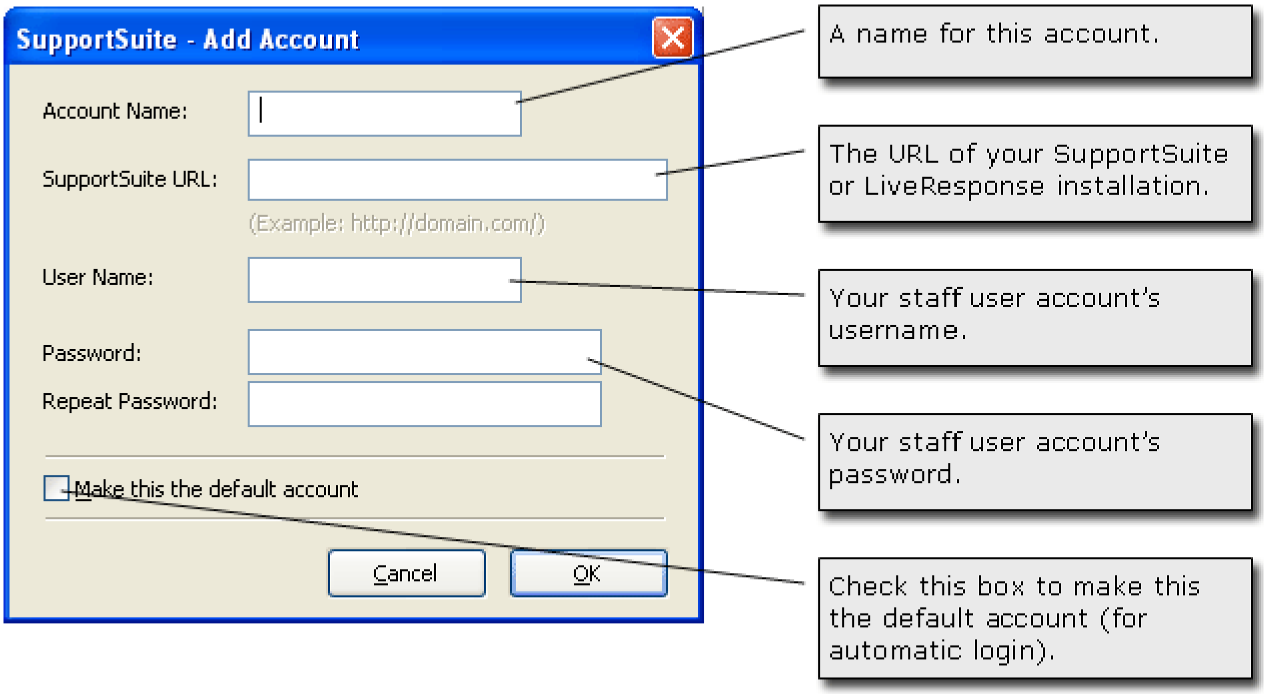


General



Accounts

- **Add** – add an account.

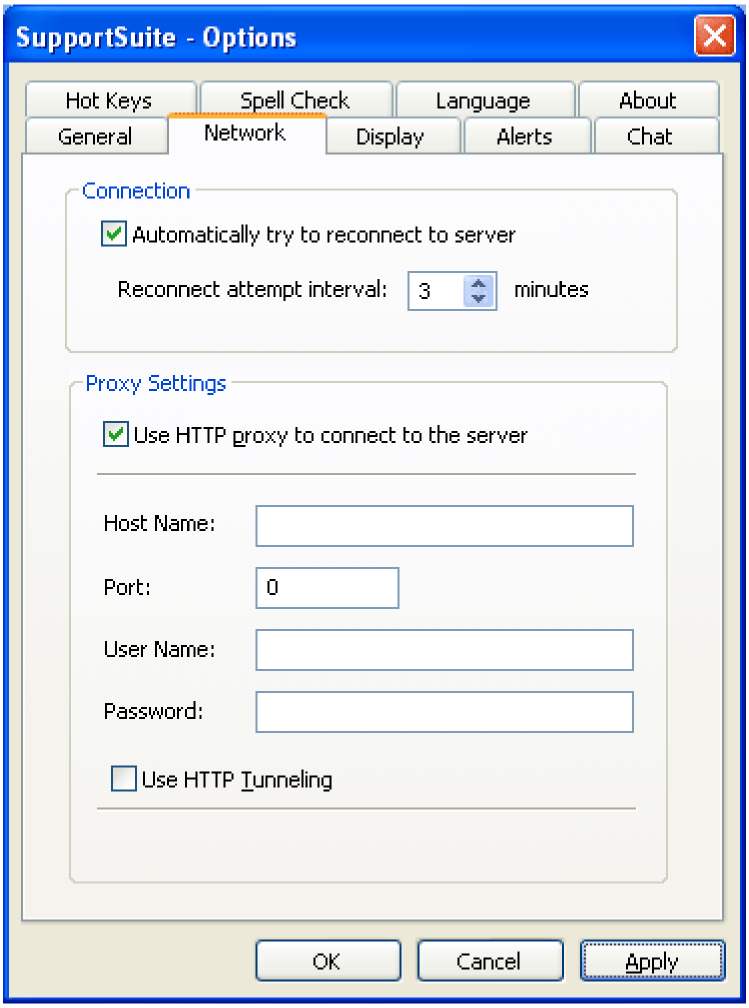


- **Edit** – edit an account's existing details.
- **Delete** – delete an account.

General Settings

- **Automatically start SupportSuite with Windows** – if enabled, the Client Application will start automatically when a user logs on to Windows.
- **Automatically log in on startup** – automatically log the Client Application into the **default** account.
- **Mark me as Busy when I'm chatting with** – the number of chat sessions you can have open before being marked as busy (see staff statuses for more information).
- **Mark me as Away when I'm idle for** – how many minutes of mouse inactivity will pass before being marked as idle.
- **Refresh visitor data every** – the time between each poll the Client Application will make to the server for visitor information and chat transcript updates.

Network



Connection

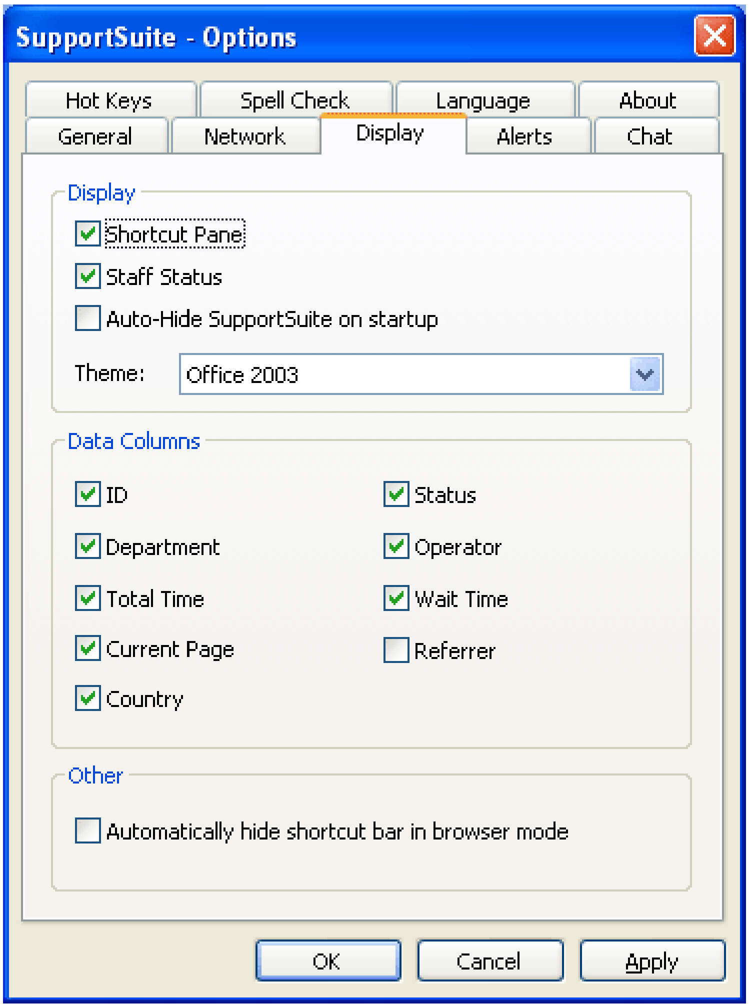
- **Automatically try to reconnect to server** – if enabled, the Client Application will make automatic connection retries if it finds itself disconnected from the server.

- **Reconnect attempt interval** – the time (in minutes) between each retry.

Proxy Settings

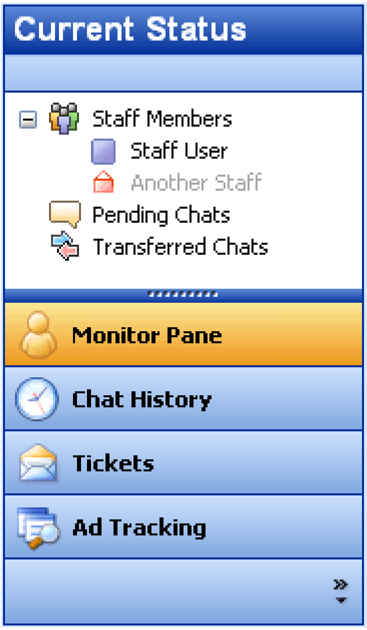
- **Use HTTP proxy to connect to the server** – if checked, the Client Application will use the proxy settings (configured below this field) to make a network connection. If you are outside of a large business network, it is recommended to leave this setting disabled**.**

Display

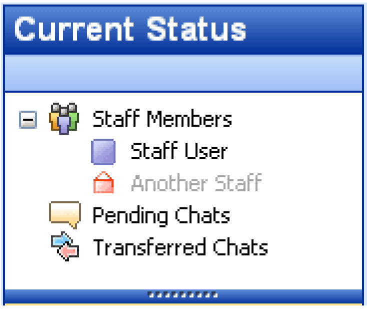


Display

- **Shortcut Pane** – if checked, the shortcut pane display will be enabled (the pane is shown below).

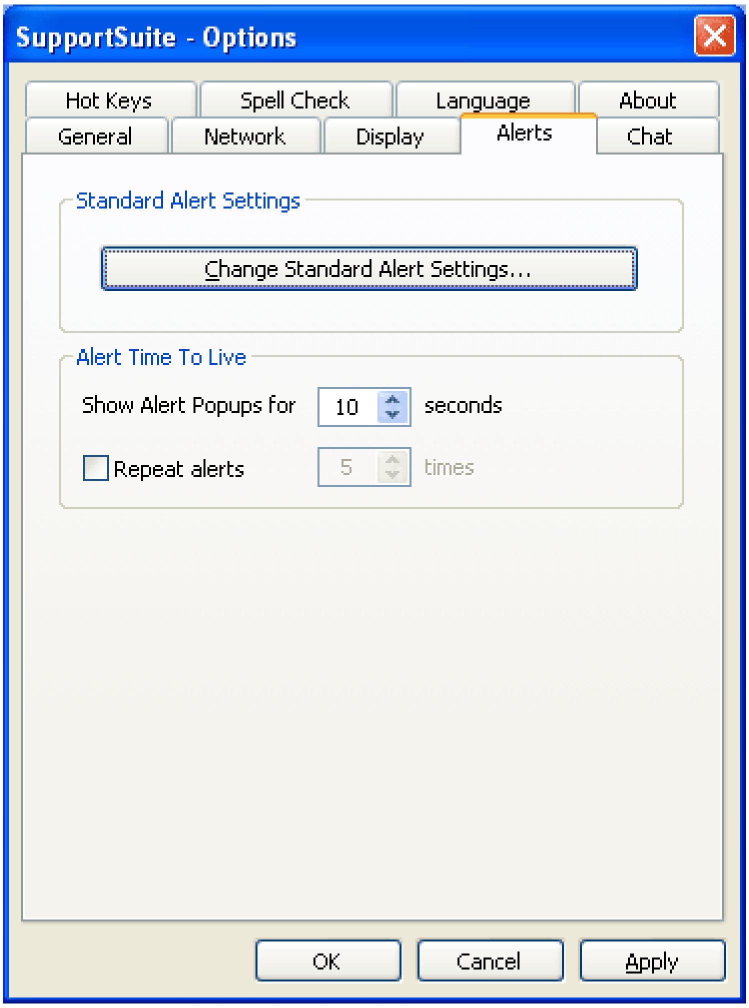


- **Staff status** - – if checked, the staff status display will be enabled (the display is shown below).



- **Auto-Hide SupportSuite on Startup** – if enabled, the Client Application will automatically minimize to the system tray.
- **Theme** – select how the Client Application should be themed.
- **Data Columns** – select the data columns you wish to view in the monitor pane.
- **Automatically hide shortcut bar in browser mode** – if enabled, when browsing a web page within the Client Application, the shortcut bar will be hidden – giving you a full browser view.

Alerts



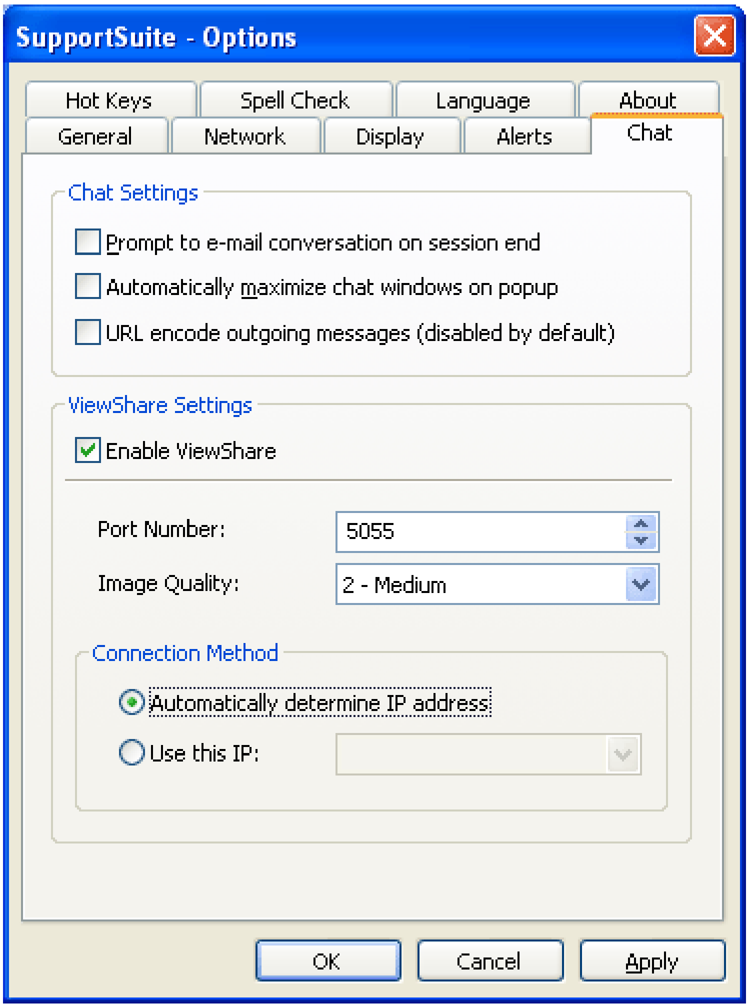
Standard Alert Settings

- **Change Standard Alert Settings** – this dialog allows you to change what events trigger alert notifications, and what sound (if any) should be played.

Alert Time To Live

- **Show Alert Popups for** – how long (in seconds) the popup notifications should display.
- **Repeat alerts** – if enabled, the alerts will be repeated after the "**Show Alert Popups for**" time has expired.

Chat



Chat Settings

- **Prompt to e-mail conversation on session end** – if enabled, you will be prompted with a notification asking whether or not you would like to e-mail a transcript of an ended chat session.

- **Automatically maximize chat windows on popup** – if enabled, the chat interface window will be maximized automatically.

- **URL encode the outgoing messages** – if enabled (disabled by default), outgoing URLs will be encoded (such as, replacing spaces with %20, converting ampersands to & and so on). You may want to enable this if you have issues with sending links containing spaces, that become "unclickable" as they have not been encoded into one string.

ViewShare Settings

- **Enable ViewShare** – in order to be able to use ViewShare, this box must be checked.

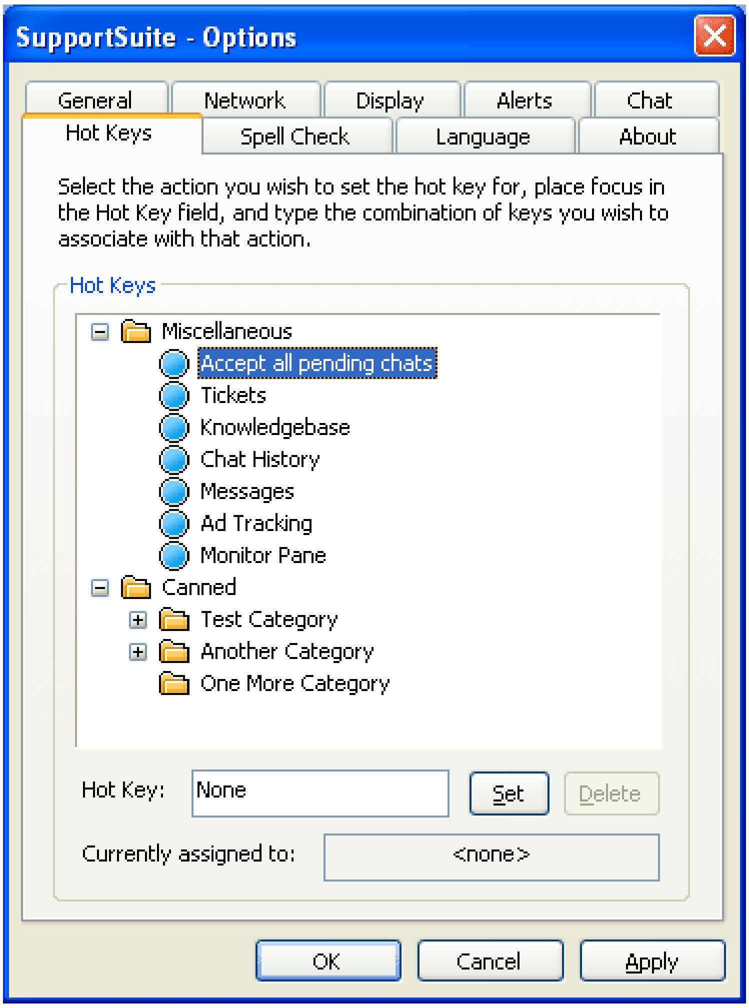
- **Port Number** – the port number through which visitors will connect to your ViewShare process on your computer.

- **Image Quality** – the quality of the broadcast image. The higher the quality, the higher your upload bandwidth should be (it is unlikely the visitor will be bottlenecked by a bandwidth too low).

Connection Method

6. Automatically determine IP address – this is best left set to default. However, if you're your visitors are experiencing problems connecting, manually enter your **external** IP address under **Use this IP**.

Hot keys



Hot keys can be assigned to common commands and tasks – for example, the insertion of a canned message or switching panes.

To set a hot key for a task:

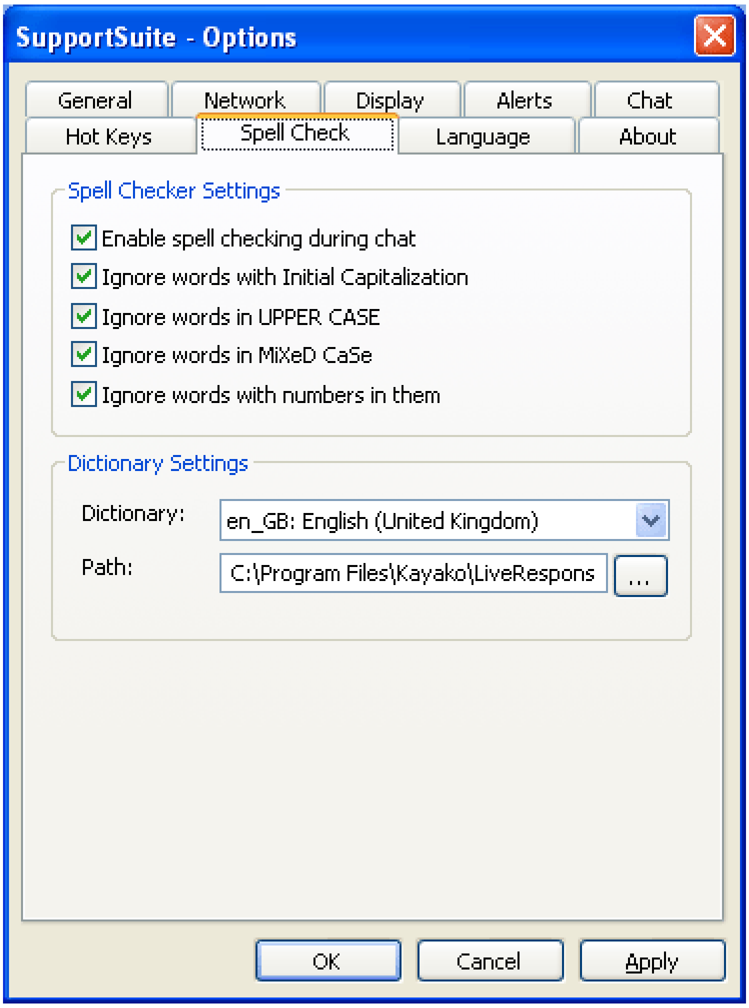
1. Select the task (as shown above).

2. Slick on the text area (above, it currently says "None" indicating there has been no assignment for this action).

3. Once the text area is selected, press the actual key (or key combination, such as CTRL+Z) to which you want to assign the action.

4. Click on the **Set** button to confirm the assignment.

Spell check



Spell Checker Settings

5. **Enable spell checking during chat –** if checked, the spell checker will be enabled.

6. **Ignore words with Initial Capitalization –** if checked, the spell checker will not spell check words that have the First letter capitalized.

7. **Ignore words in UPPER CASE -** if checked, the spell checker will not spell check words that are in UPPER CASE.

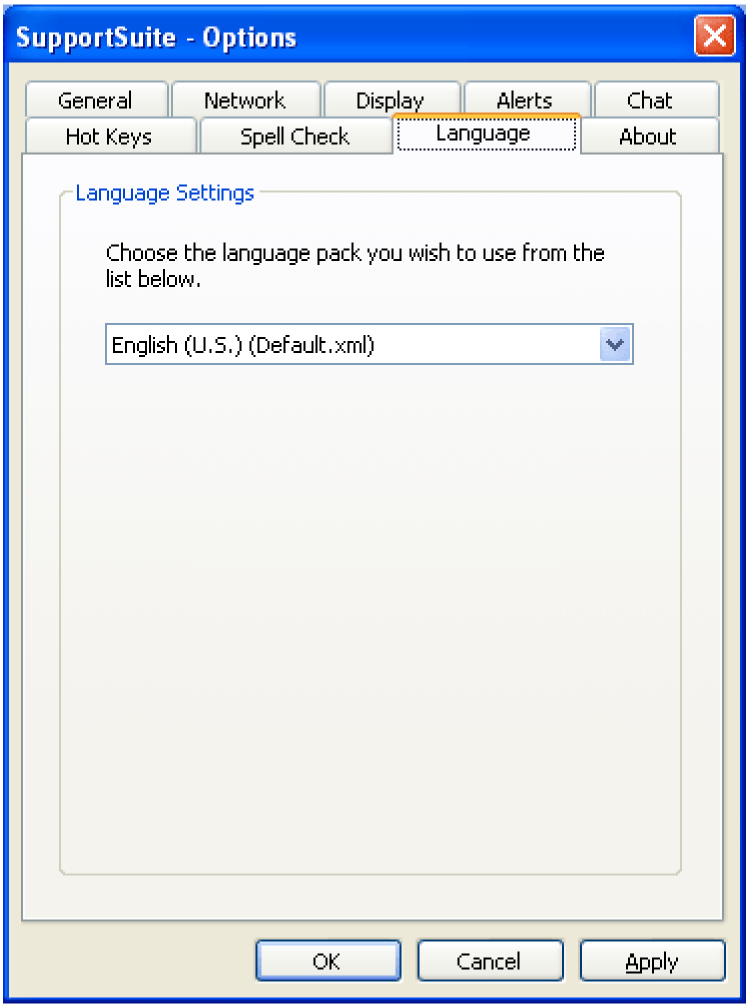
8. **Ignore words in MiXeD cAsE -** if checked, the spell checker will not spell check words that are in MiXeD case.

9. **Ignore words with numbers in them -** if checked, the spell checker will not spell check words that have numbers in them (such as numbers9 or numb3rs).

Dictionary Settings

- **Dictionary –** select which dictionary the spell checker should use.
- **Path –** set the path to dictionaries that the Client Application will list here.

Language



Language Settings

- **Language** – set which language pack should be used for the Client Application menus, table headings, window titles and so on.

Support resources

If you would like to send in a suggestion or report any errors in this manual, please send an e-mail to docs@kayako.com or post in the documentation forum - your input is very much appreciated. Please do **not** use this address for support.

You can obtain further support for any of Kayako's products via:

- **Support desk** – www.kayako.com/support
- **Community forums** – http://forums.kayako.com

Frequently asked questions

How do I add a new language pack to Client Application?

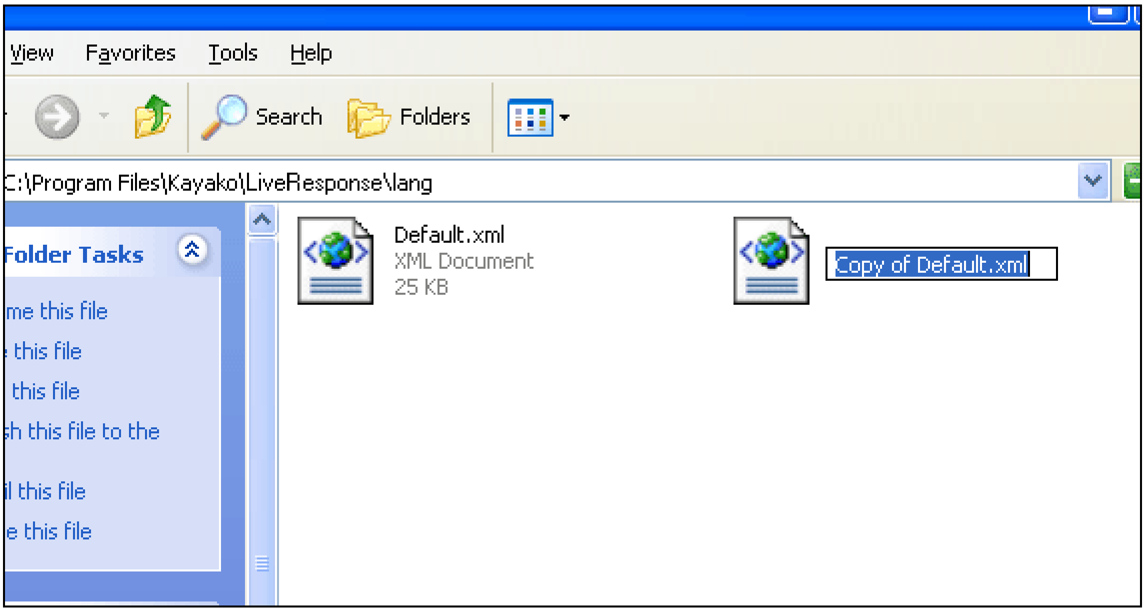
To install a new language pack for the Client Application (you should have already downloaded your **Language.xml** file or created your own), copy the file into the **C:\Program Files\Kayako\LiveResponse\Lang** (what was set during the installation process Step four: Installation location).

Now configure the Client Application to use the new language pack in the language dialog.

How do I write a new language pack for the Client Application?

The words and phrases the Client Application uses are all stored in an XML file located in the **\Lang** folder of your the Client Application installation path (what was set during the installation process Step four: Installation location).

To create a new language pack, create a copy of **Default.xml** and name it accordingly (such as **Spanish.xml**).



Open up the file. You will be presented with XML markup similar to the following:

```
<code>Code</code>
<title>English (U.S.)</title>
<rtl>false</rtl>
```

It is this markup that needs to be modified in order to create a new language pack. Begin by configuring the Code, Title and RTL properties of the XML file.

- **Code** – should be left as "Code".

- **Title** – the title given to your language pack (this is the title that will be displayed when selecting a language pack from within the Client Application as in the language dialog).

- **RTL** – whether or not the language contained in this file is a **right-to-left** language and character set such as Hebrew.

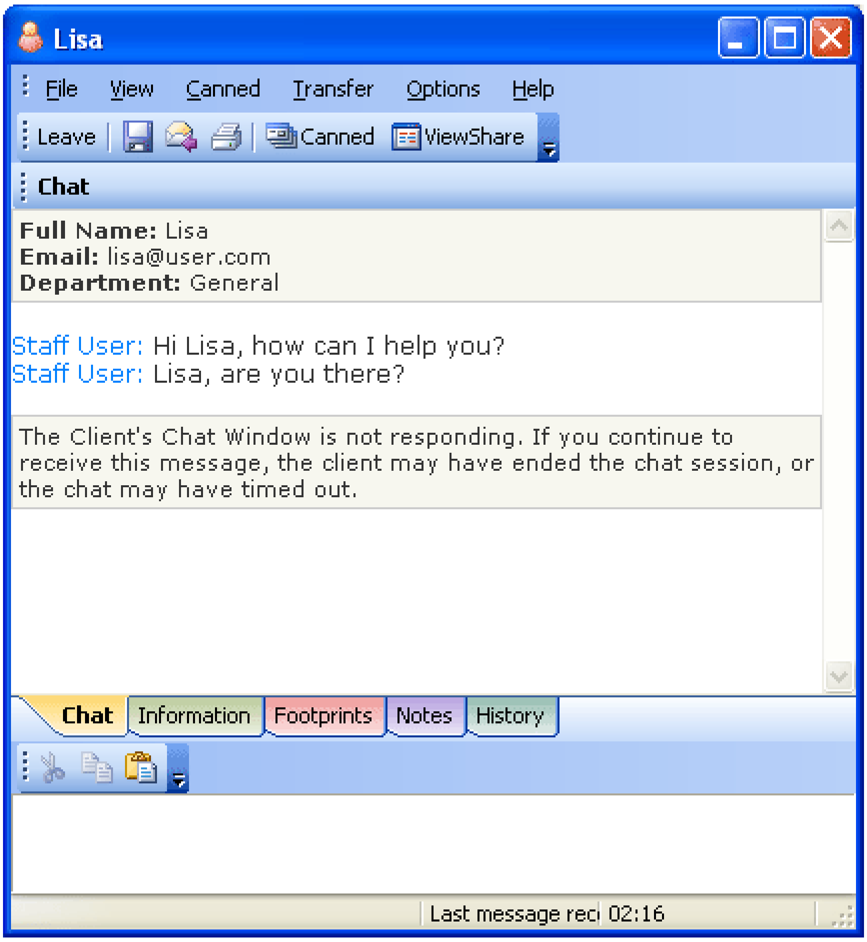
Once this basic configuration of the language file has been complete, you can now start translating the phrases, as described below.

```
<string id="IDS_MAINWNDTITLE">Kayako LiveResponse</string>
<string id="IDS_APPNAME">SupportSuite</string>
<string id="IDS_ERRMSGTITLE">SupportSuite - Error</string>
<string id="IDS_INFOMSGTITLE">SupportSuite - Information</string>
```

The "**id**" of the phrase should not be changed. This is the ID the Client Application uses to reference these phrases. The only text that should be changed is highlighted in **red** – all other markup should be left alone.

What does "The Client's Chat Window is not responding" mean?

When the Client Application doesn't receive a response from the visitor's browser window whilst in a chat session, this notice will be displayed.



Seeing this message more than once is usually an indication that the visitor has closed his or her chat window. However, seeing it once may just be the result of connection issues on the visitor's end.

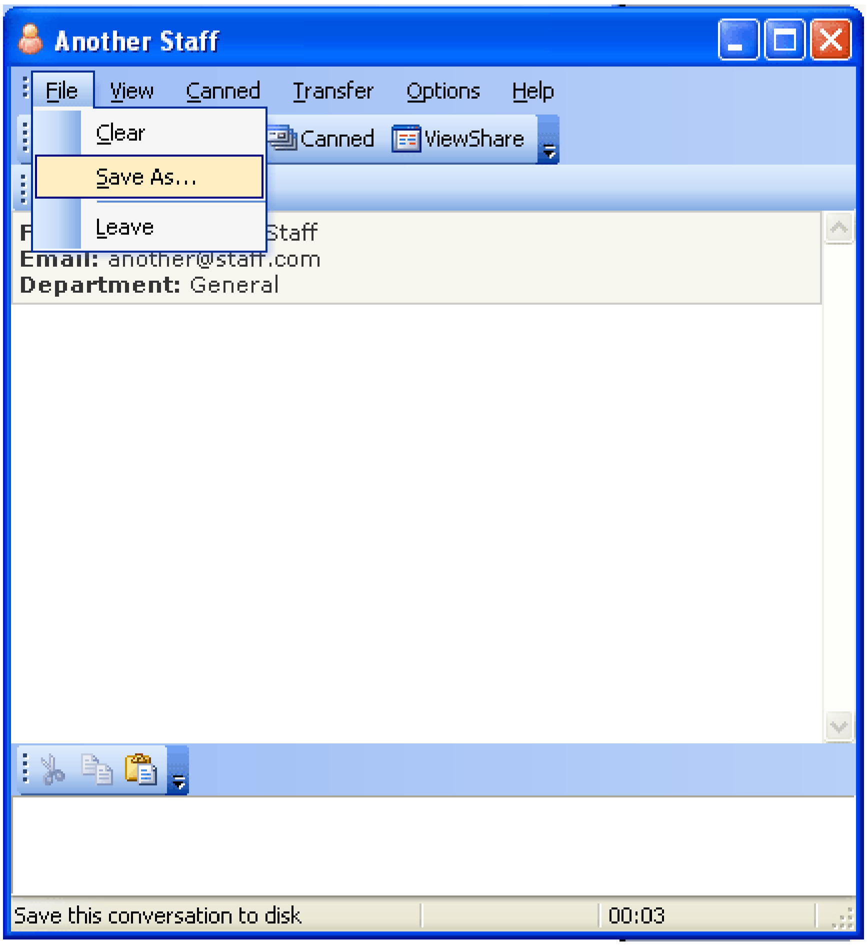
How are notes stored?

Notes are stored and associated with by a visitor's IP address. This means that if the same visitor returns to the support desk with a **different** IP address, you will not be able to retrieve notes for that visitor left for a **pervious** IP address.

How can I save a copy of a chat transcript?

To save a HTML file of the current chat transcript from within the chat interface:

1. Open the **File** menu.
2. Click on the **Save As...** menu option, as shown below.

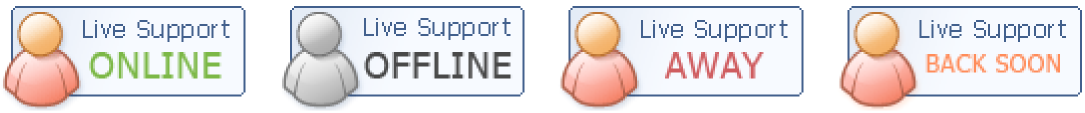


What is a "Tag"?

A **tag** is a JavaScript tab that can be generated and placed on your web pages, and is already placed on the pages of your **client interface** to your support desk.

Tagging a web page enables you to track visitors through the page, using the visitor tracking features of LiveResponse – particularly the features within the Client Application.

There are two types of JavaScript tag – one which simply and silently monitors your visitors, the other displays the status of your live support departments as well as monitoring your visitors, for example:



When a visitor clicks on one of these tags, he or she will be able to start a **chat request** (depending on the status of your departments).

Do I need to purchase licenses for the Client Application?

No, you do not. The Client Application is not licensed per machine, one purchasing a SupportSuite or LiveResponse license, you are free to download unlimited copies of the application and distribute them to your support desk staff users.

I have logged into the Client Application, but Live Support still displays as Offline

The most common cause of this issue is that you have not given yourself or the staff user in question access permissions to the live support department(s). Permissions are managed within the **administrator control panel** of your SupportSuite or LiveResponse installation.

How are chat histories recorded?

Chat histories are stored by a visitor's IP address, or if one is available (either by the visitor logging into the support desk or entering and e-mail address when requesting a chat session), stored by their e-mail address.

When stored by e-mail address, chat histories can be called up from within the SupportSuite or LiveResponse staff control panel.

All staff users are not notified to a chat request – why?

When a chat request comes in, the system notifies each available staff user in turn. If the staff user does not respond within a given time, the next staff user will be "tried". This system is explained in more detail in staff receives chat request.

Error messages explained

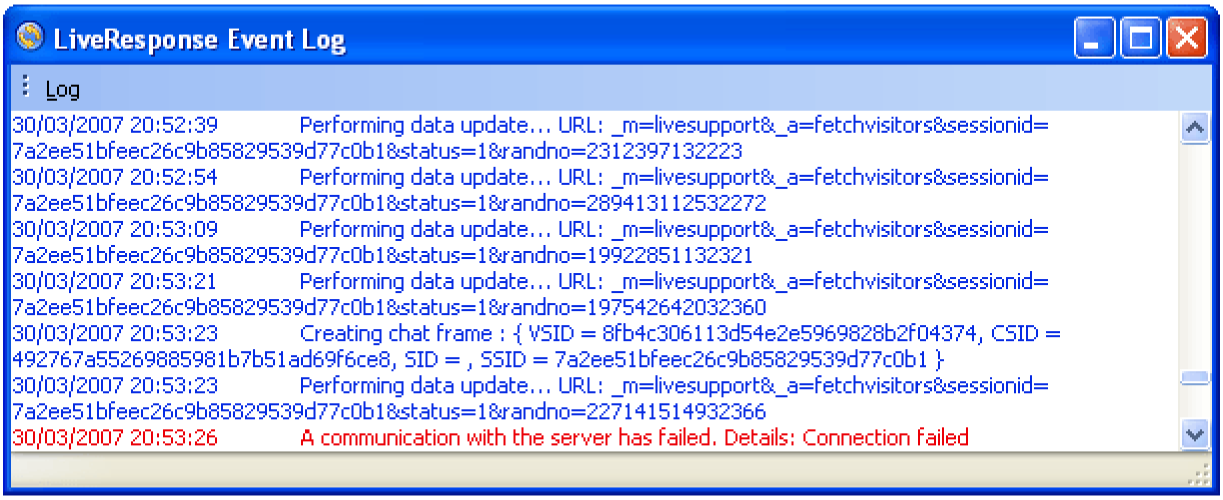
Event logger

The Client Application has an integrated event logging system and a log viewer. Most errors (among other events) are reported to this log.

To view the event log:

1. Click the **Tools** menu
2. Click the **Event Log** menu choice.

This will bring up a window similar to the following:



Error: "The server returned an error response"

Possible causes:

1. This error is most commonly caused by a *404 Not Found* error, a Forbidden error or any other **HTTP code** that is not 200 (the code for "successful").

Potential solutions:

1. Check you have entered the correct path to your support desk in Options: General.
2. Check the configuration of your web server (such as folder permissions, .htaccess permissions etc.).

Error: "Unknown error"

Possible causes:

1. Something has gone very wrong within the internals of the Client Application.

Potential solutions:

1. Restart the program. If the problem persists, make sure you have the latest stable build of the Client Application (see getting the latest version).

Error: "Received unexpected response from server (invalid header)"

Possible causes:

1. The Client Application receives data it does not expect to receive.
2. Your support desk may be "down" and displaying an error message (such as a *MySQL error*).
3. Your support desk may be displaying a **license error**.
4. Your support desk may be reporting that the **setup** directory still exists.

Potential solutions:

1. Ensure you are running the latest stable release of the Client Application (see getting the latest version).
2. Ensure your support desk is working properly.

Error: "The session has expired"

Possible causes:

1. When the Client Application logs into your support desk, it creates an active session for your username. If this session is deleted or ended for any reason, this error will be generated.
2. A common cause of this error is that more than one copy of the Client Application is being used to login to the same support desk – each one attempting an alternating login that interferes with the other's session.

Potential solutions:

1. Ensure that no more than one copy of the Client Application is being used to login to your support desk with the **same username**.

Error: "Failed to connect to server"

Possible causes:

1. You have entered an invalid host name in your support desk URL.
2. Your server is unavailable.

Potential solutions:

1. Ensure that you have entered the correct support desk host name and URL in the options dialog.

2. Check the connectivity of your server.

Error: "Connection to the server timed out"

Possible causes:

1. You have entered an invalid host name in your support desk URL.

2. Your server is unavailable.

Potential solutions:

1. Ensure that you have entered the correct support desk host name and URL in the options dialog.

2. Check the connectivity of your server.

Error: "Authentication has failed"

Possible causes:

1. You have entered the wrong username and password that the Client Application is attempting to use to login to the support desk.

Potential solutions:

1. Ensure that you have entered the correct username and password in the options dialog.

Error: "HTTP request has failed"

Possible causes:

1. There was a problem in making the HTTP request to your support desk.

Potential solutions:

1. Restart the program. If the problem persists, restart your machine. If the problem still persists, please contact support.