

# Invitation Rules - Best Practices

June 2010

*Best Practice Guide*



LIVEPERSON

## Introduction

This guide provides a list of best practices for Invitation Rules. LivePerson considered online visitor behaviors that could signify abandonment (such as time spent on a specific page) and defined how best to use Invitation Rules. The best practices for Invitation Rules can help you decrease abandonment by engaging online visitors to chat with you based on their browsing behavior.

Each best practice is a standalone procedure that contains tasks. Each best practice procedure includes the following components:

- ◆ Who Should Complete this best practice procedure?
- ◆ What will you learn?
- ◆ What will you need?
- ◆ Recommended Reading
- ◆ Steps to Complete

The following table displays the list of best practice procedures and learning outcomes that administrators should complete.

**Table 1: Procedures and learning outcomes presented in this guide**

Procedure Name	Learning Outcome	Time to Complete
Procedure 1: Logging in and Accessing Visitor Rule	<ul style="list-style-type: none"><li>◆ Logging into the admin console</li><li>◆ Accessing the Visitor Rules</li></ul>	5 min
Procedure 2: Adding the Time-Based Chat Auto Invite rule	<ul style="list-style-type: none"><li>◆ Adding a rule that automatically sends chat invitations to all visitors who spend a minute or more on your site to chat (optimizes chat volume and increases conversion rates)</li></ul>	10 min
Procedure 3: Adding the Search Engine Auto Invite rule	<ul style="list-style-type: none"><li>◆ Adding a rule that automatically sends chat invitations to visitors who reach your site via a search engine query.</li></ul>	10 min
Procedure 4: Adding the Repeat Visitors Auto Invite rule	<ul style="list-style-type: none"><li>◆ Adding a rule that invites Repeat site visitors to chat with an agent</li></ul>	10 min
Procedure 5: Adding the US Visitors Chat Invite rule	<ul style="list-style-type: none"><li>◆ Adding a rule that invites visitors based on their Geographical Location</li></ul>	10 min

## Procedure 1: Logging in and Accessing Visitor Rules

### Who Should Complete this Procedure?

LivePerson Administrators.

### What will you learn?

In this procedure, you will log into the admin console and access Visitor Rules.

### What will you need?

- ◆ Your **LivePerson Account Number**
- ◆ Your **User Id**
- ◆ Your **Password**

### Recommended Reading

[LivePerson Chat - Administrator - Visitor Rules](#)

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**Note:** *The training material discussed in this guide displays all LivePerson communication channels: Chat, Voice, Email and Knowledgebase. To add communication channels, please contact your Account Manager.*

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#### **Steps to Complete:**

- 1 Login to the Liveperson Admin Console.
- 2 Enter your **LivePerson Account Number**.
- 3 Enter your **User Id**.
- 4 Enter your **Password**.
- 5 Select the **Submit** button.
- 6 From the menu, select **Rules**.
- 7 Select **Visitor Rules**.
- 8 Select the **Visitor Rules** tab.



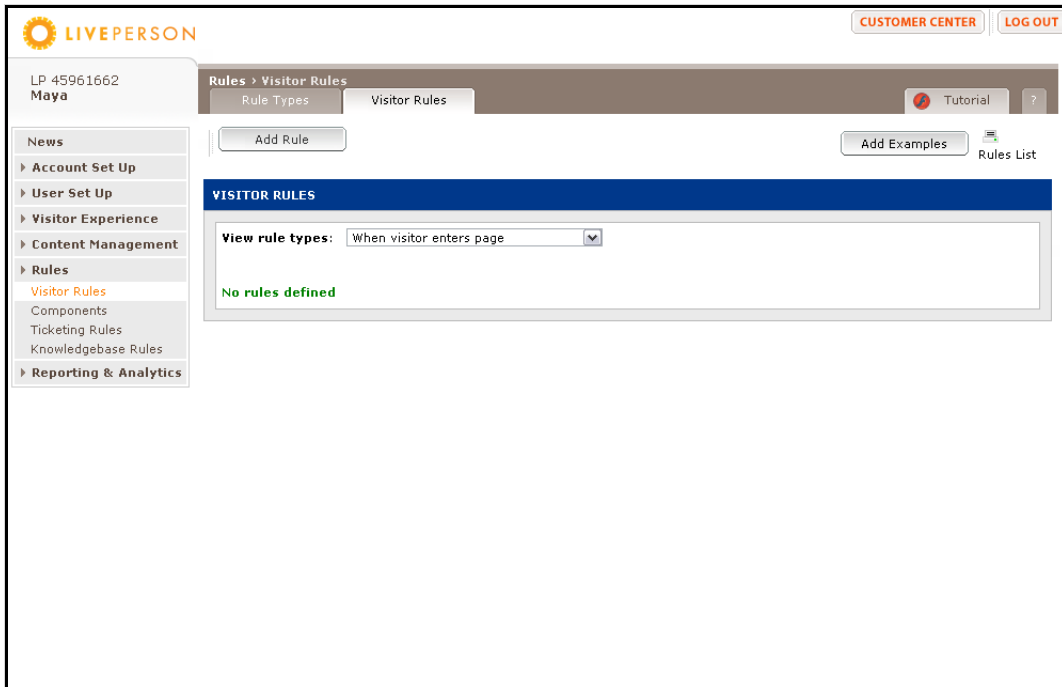


Figure 1: Logging in and accessing Visitor Rules.

**Note:** If you are a **LivePerson Pro** customer, your user interface will look slightly different. Scroll down and click **Advanced View** to see the page displayed in this screenshot.

## Procedure 2: Adding a Time-Based Chat Auto Invite rule

### Who Should Complete this Procedure?

LivePerson Administrators.

### What will you learn?

In this procedure, you will establish a rule that automatically sends chat invitations to all visitors who spend a minute or more on your site.

### What will you need?

Complete Procedure 1: Logging in and Accessing Visitor Rules.

### Recommended Reading

[LivePerson Chat - Administrator - Visitor Rules](#)

#### **Steps to Complete:**

- 1 From the **View Rule Type** list, select **When visitor enters the page**.
- 2 Select the **Add Rule** button.
- 3 In the **Name** field, type *Time-Based Chat Auto Invite*
- 4 In the **Description** field, type *Automatically sends chat invitations to all visitors who spend 3 minutes or more on a certain page on your site.*
- 5 From the **Status** list, select **Enabled**.
- 6 Select the **Add Condition** link.
- 7 From the list, select **Operators - Online Operators**.
- 8 Select the **Add Condition** link again to add a second condition.
- 9 From the list, select **Browsing, Current Page**.
- 10 From the **visitor's current page's URL or title contains** drop down box, select **The exact phrase (ignore case)** and enter the URL of the page you wish to invite visitors from.
- 11 Select the **green checkmark** button to apply your changes.
- 12 Click on **Add Action** and select **Visitor Experience**.
- 13 From the **Action** list, select **Invite visitor for chat after Time on page** and define the number of seconds to wait before inviting the visitor.
- 14 Select the Chat invitation to be used with this rule.
- 15 Select the **green checkmark** button to apply your changes.
- 16 Select **Update All** to apply your changes.
- 17 Select **Submit All Changes**.



The screenshot shows the LivePerson 'Visitor Rules' configuration page. The rule is named 'Time-based Chat Auto Invite' and is currently enabled. The description states: 'Automatically sends chat invitations to all visitors who spend 3 minutes or more on a certain page on your website.' The rule type is 'When visitor enters page'.

**Conditions:**

If All of the following conditions are true:		
there is at least one operator online	<a href="#">Edit</a>	<a href="#">Delete</a>
the visitor's current page's URL or title contains the exact phrase (ignore case) 'shopping.htm'	<a href="#">Edit</a>	<a href="#">Delete</a>
<a href="#">Add Condition</a>		

**Actions:**

Then perform these actions:		
Invite visitor for chat after '240' seconds on page using predefined invite 'Holiday Offer Invitation'	<a href="#">Edit</a>	<a href="#">Delete</a>
<a href="#">Add Action</a>		

Stop processing after this rule

Buttons: Update All, Cancel

Figure 2: Adding a time-based Chat invitation rule

## Procedure 3: Adding the Search Engine Auto Invite rule

### Who Should Complete this Procedure?

LivePerson Administrators

### What will you learn?

In this procedure, you will establish a rule that automatically sends chat invitations to all visitors who reach your site via a search engine query.

### What will you need?

Complete Procedure 1: Logging in and Accessing Visitor Rules

### Recommended Reading

[LivePerson Chat - Administrator - Visitor Rules](#)

#### **Steps to Complete:**

- 1 From the **View Rule Type** list, select **When visitor enters the page**.
- 2 Select the **Add Rule** button.
- 3 In the **Name** field, type *Search Engine Auto Invite*
- 4 In the **Description** field, type *Automatically sends chat invitations to visitors who reach your site via a search engine query*.
- 5 From the **Status** list, select **Enabled**.
- 6 Select the **Add Condition** link.
- 7 From the list, select **Browsing - Search Engine Found**.
- 8 Select the **green checkmark** button to apply your changes.
- 9 Select the **Add Condition link** to add another condition.
- 10 From the list, select **Operators - Online Operators**.
- 11 Select the **green checkmark** button to apply your changes.
- 12 Select the **Add Action** link.
- 13 From the **Type** list, select **Visitor Experience**.
- 14 From the **Action** list, select **Invite Visitor for Chat**.
- 15 Select the Chat invitation to be used in this rule.
- 16 Select the **green checkmark** button to apply your changes.
- 17 Select **Update All** to apply your changes.
- 18 Select **Submit All Changes**.



The screenshot displays the LivePerson 'Visitor Rules' configuration page. The rule being edited is named 'Search Engine Auto Invite'. Its description is 'Automatically sends chat invitations to visitors who reach your site via a search engine query'. The rule type is 'When visitor enters page' and its status is 'Enabled'. The rule is configured with two conditions: 'the referrer is a search engine' and 'there is at least one operator online'. The action performed is 'Invite visitor for chat using predefined invite 'Chat Invitation''. The interface includes a sidebar with navigation options like 'Account Set Up', 'User Set Up', and 'Rules', and a top navigation bar with 'CUSTOMER CENTER' and 'LOG OUT'.

Figure 3: Adding the search engine invite rule.

## Procedure 4: Adding the Repeat Visitors Auto Invite rule

### Who Should Complete this Procedure?

LivePerson Administrators

### What will you learn?

In this procedure, you will establish a rule that automatically invites repeat site visitors to chat with an agent.

### What will you need?

Complete Procedure 1: Logging in and Accessing Visitor Rules

### Recommended Reading

[LivePerson Chat - Administrator - Visitor Rules](#)

#### Steps to Complete:

- 1 From the **View Rule Type** list, select **When visitor enters the page**.
- 2 Select the **Add Rule** button.
- 3 In the **Name** field, type *Repeat Visitors Auto Invite*.
- 4 In the **Description** field, type *Invite Repeat site visitors to chat with an agent*.
- 5 From the **Status** list, select **Enabled**.
- 6 Select the **Add Condition** link.
- 7 From the list, select **Visitor Properties - Repeat Visit**.
- 8 Select the **green checkmark** button to apply your changes.
- 9 Select the **Add Condition** link to add another condition.
- 10 From the list, select **Operators - Online Operators**.
- 11 Select the **green checkmark** button to apply your changes.
- 12 Select the **Add Action** link.
- 13 From the **Type** list, select **Visitor Experience**.
- 14 From the **Action** list, select **Invite Visitor for Chat**.
- 15 Select the Chat invitation to be used in this rule.
- 16 Select the **green checkmark** button to apply your changes.
- 17 Select **Update All** to apply your changes.
- 18 Select **Submit All Changes**.



The screenshot displays the LivePerson 'Visitor Rules' configuration interface. At the top, the user is identified as 'Maya' (LP 45961662) with 'CUSTOMER CENTER' and 'LOG OUT' options. The breadcrumb trail is 'Rules > Visitor Rules'. The left sidebar contains a navigation menu with categories like 'Account Set Up', 'User Set Up', 'Visitor Experience', 'Content Management', 'Rules', 'Components', 'Ticketing Rules', 'Knowledgebase Rules', and 'Reporting & Analytics'. The main area is titled 'CAMPAIGNS' and features an 'Add Rule' button. The current rule configuration is as follows:

- Name:** Visitors Auto Invite
- Description:** Invite Repeat site visitors to chat with an agent.
- Rule Type:** When visitor enters page
- Status:** Enabled

The rule is configured with the following conditions and actions:

If All of the following conditions are true:		
repeat visit to the site	Edit	Delete
there is at least one operator online	Edit	Delete
<a href="#">Add Condition</a>		
Then perform these actions:		
Invite visitor for chat using predefined invite 'Chat Invitation'	Edit	Delete
<a href="#">Add Action</a>		

At the bottom of the configuration area, there is a checkbox for 'Stop processing after this rule' (which is currently unchecked) and two buttons: 'Update All' and 'Cancel'.

Figure 4: Adding a repeat visitor invitation rule.

## Procedure 5: Adding the US Visitors Chat Invite rule

### Who Should Complete this Procedure?

LivePerson Administrators

### What will you learn?

In this procedure, you will establish a rule that automatically invites visitors based on their geographical location.

### What will you need?

Complete Procedure 1: Logging in and Accessing Visitor Rules

### Recommended Reading

[LivePerson Chat - Administrator - Visitor Rules](#)

#### Steps to Complete:

- 1 From the **View Rule Type** list, select **When visitor enters the page**.
- 2 Select the **Add Rule** button.
- 3 In the **Name** field, type *US Visitors Chat Invite*.
- 4 In the **Description** field, type *Invite visitors based on their Geographical Location*.
- 5 From the **Status** list, select **Enabled**.
- 6 Select the **Add Condition** link.
- 7 From the list, select **Misc - GEO Attribute**.
- 8 From the **GEO Attribute** list, select **Country**.
- 9 Then select **equal to**.
- 10 Type *United States* in the **GEO Attribute** field.
- 11 Select the **green checkmark** button to apply your changes.
- 12 Select the **Add Condition** link.
- 13 From the list, select **Time Functions - Time In Site**.
- 14 From the **time on the site** list, select **>**.
- 15 Type *180* in the **time on the site** field.
- 16 Select the **green checkmark** button to apply your changes.
- 17 Select the **Add Condition** link.
- 18 From the list, select **Operators - Online Operators**.
- 19 Select the **green checkmark** button to apply your changes.
- 20 Select the **Add Action** link.
- 21 From the **Type** list, select **Visitor Experience**.
- 22 From the **Action** list, select **Invite Visitor for Chat**.



- 23 Select the Chat invitation to be used in this rule.
- 24 Select the **green checkmark** button to apply your changes.
- 25 Select **Update All** to apply your changes.
- 26 Select **Submit All Changes**.

The screenshot shows the LivePerson interface for configuring a rule. The user is logged in as Maya (LP 45961662). The interface includes a navigation menu on the left with options like Account Set Up, User Set Up, Visitor Experience, Content Management, Rules, and Reporting & Analytics. The main area is titled 'Rules > Visitor Rules' and contains a form for creating a rule.

**Rule Configuration:**

- Name:** US Visitors Chat Invite
- Description:** Invite visitors based on their Geographical Location
- Rule Type:** When visitor enters page
- Status:** Enabled

**Conditions:** If All of the following conditions are true:

Condition	Edit	Delete
The GEO Attribute 'Country' is equal to 'United States'	Edit	Delete
time on the site > '180' seconds	Edit	Delete
there is at least one operator online	Edit	Delete
<a href="#">Add Condition</a>		

**Actions:** Then perform these actions:

Action	Edit	Delete
Invite visitor for chat using predefined invite 'Chat Invitation'	Edit	Delete
<a href="#">Add Action</a>		

Stop processing after this rule

Buttons: Update All, Cancel

Figure 5: Inviting US visitors to chat

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