

# Implementing the Ticketing System

April 27, 2010



LIVEPERSON

Description	This manual describes LivePerson's Ticketing system and the options for its implementation. Each option is explained in a step-by-step procedure.
Who should use this guide?	This manual is targeted towards system administrators, IT personnel and other individuals tasked with configuring the Ticketing system.
Duration	1 to 1.5 hours
Prerequisites	Review the following Web-Based training sessions: <a href="#">Admin Console Overview WBT</a> <a href="#">Skills and Agents WBT</a>

### **Steps to success**

Allow yourself approximately 1 to 1.5 hours to learn the material presented in this manual and implement the Ticketing system on your website.

### **Need help?**

This manual covers the most recommended ways to implement the Ticketing system on your website. For advanced HTML customization please contact your Success Manager at LivePerson.

### **How is this manual structured?**

This training manual is divided into units that are broken into lessons to help you learn efficiently and effectively.

- ◆ Units are a collection of related topics and consist of the following sections:
  - ❖ Introduction: What will you learn?
  - ❖ Lessons in this unit
  - ❖ Unit Summary
- ◆ Lessons contain useful information as well as step-by-step procedures, and consist of the following sections:
  - ❖ Introduction
  - ❖ What do you need for this lesson?
  - ❖ How to do it / how does it work?
  - ❖ Summary
- ◆ Appendix A is a list of tips and recommended best practices.

## Agenda

Unit 1: Overview of the LivePerson Ticketing system

Unit 2: Planning Your Implementation

Lesson 1: Analyze your website

Lesson 2: Prepare a POP3 mailbox

Lesson 3: Select your implementation option

Unit 3: Implementing a Standard HTML Form

Lesson 1: Introduction

Lesson 2: Outbound email setup

Lesson 3: POP3 mailbox configuration

Lesson 4: Customizing the HTML form

Lesson 5: Tagging your website with the LivePerson code

Unit 4: Implementing a Contact Email on Your Website

Lesson 1: Introduction

Lesson 2: Outbound email setup

Lesson 3: POP3 mailbox configuration

Lesson 4: Tagging your website with the LivePerson code

Appendix A: Tips and Recommended Best Practices



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# Unit 1: Overview of the LivePerson Ticketing system

## What will you learn?

This unit presents an overview of LivePerson's Ticketing system. In this unit you will learn about the structure of the Ticketing system and the different scenarios that create it.

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**Note:** For this unit we recommend you login to your Agent Console so you can review the email and ticketing area and see where tickets are handled. You will need your LivePerson account number, username and password.

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## How does it work?

The Ticketing system provides an option for visitors on your website to send agents a request via email, using an HTML form or their own email program. You can then route, track and deliver email messages between visitors and agents. Your agents will receive the emails within tickets in the LivePerson Agent Console.

There are different scenarios that create the email and ticket flow:

### **When an email is sent from the visitor to the agent**

The visitor clicks on a link on your website. An HTML form or standard email program (Contact email) is used to send mail to the agent. The agent receives the email as a ticket in the Agent Console. A POP3 mailbox is used to send and receive emails.

Emails can be routed to different departments (Skills) according to various criteria (rules, content, form fields, etc.)

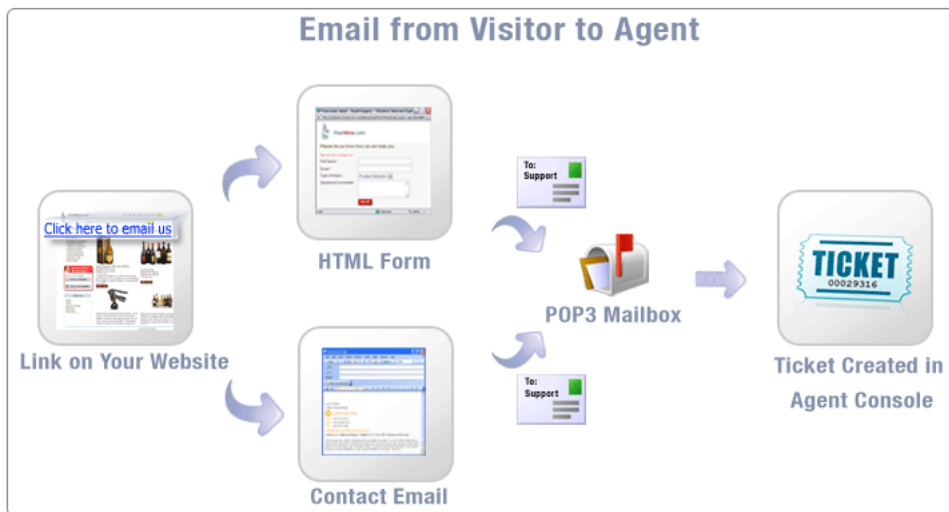


Figure 1: *Email from visitor to agent*

👉 **When an email is sent from the agent to the visitor**

The agent sends email to a visitor via the LivePerson Agent Console. The visitor receives a standard email from the same POP3 mail address. This email carries the **Sender Name** in its **From** field. You will learn how to set the Sender Name in a later lesson, Lesson 2: Outbound email setup



Figure 2: *Email from agent to visitor*

### **Unit Summary**

You have learned about the structure of the Ticketing system and its functionality within different scenarios: when mail is sent from visitors to agents and vice versa.

## Unit 2: Planning Your Implementation

### *What will you learn?*

In this unit you will learn about the importance of selecting the right location on your website from which to link to the Ticketing system. You will learn more about setting up a POP3 mailbox, as well as the features and benefits of each implementation option, so you can choose what is best for your website.

### *Lessons in this unit*

Lesson 1: Analyze your website

Lesson 2: Prepare a POP3 mailbox

Lesson 3: Select your implementation option

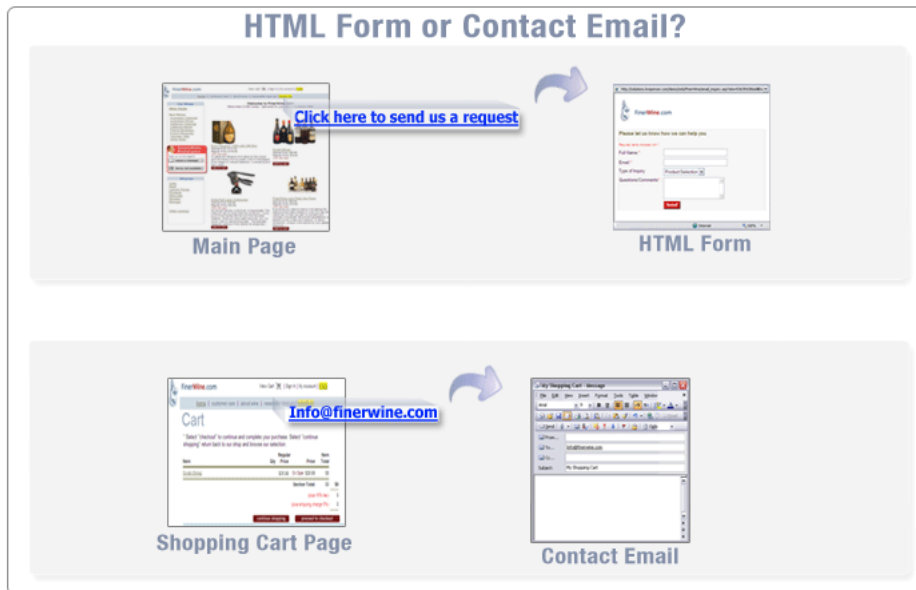


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## Lesson 1: Analyze your website

### Introduction

Before you start the implementation process, you will need to analyze your website and decide where you'd like your visitors to have the option to send an email to your company, as well as the type of implementation for those responses (HTML form or Contact email).



### How does it work?

If your website doesn't already have an option to send mail to your agents, use the following tips before adding it:

- ◆ Choose the best location. For example, top, bottom of the page, or both.
- ◆ Embed the link in a visible area.
- ◆ Make sure the link is not hidden or covered by other elements on your website.

If you already have a mail or Ticketing system on your website, consider which links should open an HTML form and which should open a new outgoing message (Contact email).

Lesson 3: Select your implementation option, provides more information about each implementation type so you can choose the option that is best for your website.

### Summary

You have learned about the aspects you should consider when linking to the Ticketing system on your website. Next, you will learn about a POP3 mailbox and its role within the system.

## Lesson 2: Prepare a POP3 mailbox

### Introduction

In this lesson you will learn more about preparing your POP3 mailbox, which is required to successfully implement the LivePerson Ticketing system.

### What is a POP3 mailbox and why do you need it?

POP3 (Post Office Protocol 3) is a standard protocol in which email is received and held for you by your Internet server. Periodically, your client email receiver (email program) checks your mailbox on the server and downloads any messages using POP3.

You can think of POP3 as a “store-and-forward” service. The LivePerson server will poll the POP3 server for emails in predetermined time intervals (between 1 minute and 10 minutes).

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**Note:** *The POP3 mailbox you will use must be empty. If there are email messages on the server, they will be downloaded to the LivePerson Server and deleted from the POP3 mailbox. In addition, tickets will be created in your Agent Console for any email that may have previously existed in the POP3 mailbox.*

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### Summary

You have learned about a POP3 mail mailbox and its use within the Ticketing system. Next, you will learn more about the implementation options, HTML forms and a Contact email, so you can choose the best option for your website.



## Lesson 3: Select your implementation option

### Introduction

Each email link on your website can be associated with only one implementation option: an HTML form, or a new outgoing message of a standard email program (Contact email). Therefore you need to understand the meaning of each implementation option. This lesson will discuss each option in more detail and present its pros and cons, enabling you to select the best option.

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**Note:** For this lesson we recommend that you login to your LivePerson Admin Console and navigate to Visitor Experience > Email > Standard Forms tab. This will enable you to examine and review the HTML forms that you will later learn how to customize and implement.

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### How does it work?

#### 👉 What is a standard HTML form?

Standard HTML forms are created in the LivePerson Admin Console. This feature enables you to customize HTML forms so that they include your brand elements. It also makes it easy to include questions and fields that prompt visitors for the data your agents will need to resolve their inquiries. To promote first-contact resolution, you can designate some of the questions or fields as required.

The HTML Form option is useful for companies that want to ensure their agents receive all of the details they need from visitors, as well as deliver that data in a consistent structure.

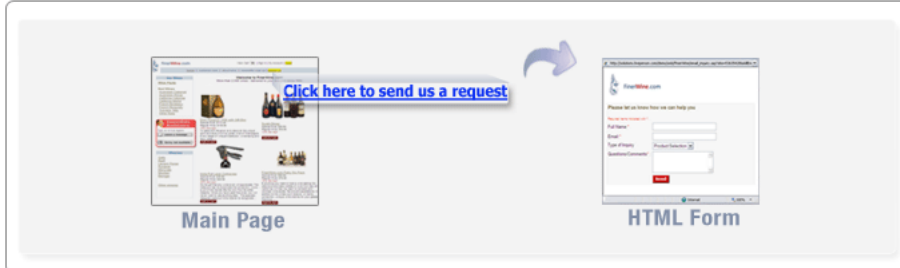


Figure 3: Standard HTML form

**☞ What is a Contact email?**

A Contact email is an email address to which your visitors can send inquiries.

When visitors click on the Contact email link, their familiar email program will be called up on their computers, and outgoing messages will be generated to the address you've provided. Visitors then type in a free-form message. Customization and survey questions are not available with this option.

The benefit of this option is that it is very quick to implement. However, the data you receive via this option will be contained within a regular email and will not be structured. It may not contain all the details you need in order to efficiently address the customer's query.



### **Compare both options**

The following table summarizes the pros and cons of HTML forms and Contact email implementation.

**Table 1: Pros and Cons of Implementation Options**

	Pros	Cons
<b>HTML Form</b>	<ul style="list-style-type: none"><li>◆ Fully branded</li><li>◆ agents receive structured data</li><li>◆ Survey customization ensures that all required data is received in first correspondence</li><li>◆ Secure communication</li></ul>	<ul style="list-style-type: none"><li>◆ Setup of form is required</li><li>◆ Customization options are limited</li></ul>
<b>Contact email</b>	<ul style="list-style-type: none"><li>◆ Simple to implement (no setup of form is required)</li><li>◆ Visitor uses familiar email program</li></ul>	<ul style="list-style-type: none"><li>◆ Data is not structured</li><li>◆ Data may be incomplete or insufficient</li></ul>

### **Summary**

You have reviewed the features, benefits and pros & cons of each implementation option, so you can choose the option that suits you best.

### **Unit Summary**

In this unit you've learned about locating the link on your website. You've also learned about setting up a POP3 mailbox, as well as the features and benefits of each implementation option.

In the next unit you will learn how to implement one of the options, the LivePerson standard HTML form.



## Unit 3: Implementing a Standard HTML Form

### *What will you learn?*

In this unit you will learn how to implement an HTML form that will pop-up when visitors click on the [email us](#) link on your website.

### *Lessons in this unit*

Lesson 1: Introduction

Lesson 2: Outbound email setup

Lesson 3: POP3 mailbox configuration

Lesson 4: Customizing the HTML form

Lesson 5: Tagging your website with the LivePerson code



LIVEPERSON

## Lesson 1: Introduction

### Introduction

Now that you have reviewed the Ticketing system, its structure and functionality, learned about preparing your website for implementation and the different options you can use for implementing, you're ready to review the implementation process for a standard HTML form.

### How to do it?

Let's take a closer look at the flow of email and tickets mentioned in previous units. The left-hand side of the following diagram shows the steps administrators need to perform. You will learn how to perform these steps in the next lessons. The result of each step the administrator performs is shown on the website and agent view of the flow (on the right-hand side of the following diagram).



Figure 4: The email / ticket flow from administrator and website view

## Summary

You have learned about the steps you will need to perform in order to implement the HTML form on your website. You've also seen where each step is used within the email and ticket flow. Next, you will learn how to perform the first step, outbound email setup.



## Lesson 2: Outbound email setup

### Introduction

The **Sender Name** and **Address** appear in outbound emails that agents send to visitors (for example, FinerWine Support Team can be set as the **Sender Name**). It is important to set the **Sender Name** so that visitors receive emails with a recognizable name or skill group.

### What do you need?

- ◆ Your LivePerson account number, username and password
- ◆ **Skills** must be set in your LivePerson account
- ◆ The details of your POP3 email address

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**Important:** *The POP3 mailbox you will use must be empty. If there are email messages on the server, they will be downloaded to the LivePerson Server and deleted from the POP3 mailbox. In addition, tickets will be created in your Agent Console for any email that may have previously existed in the POP3 mailbox.*

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### How to do it?

- 1 Log into the Admin Console and navigate to **User Set Up > Skills > Cross-Channel Settings** tab.
- 2 Select the Skill for which we will set the **Sender Name**.
- 3 In the **Email Address** box, type the POP3 email address you've created and will be displayed on this skill's outgoing emails.
- 4 In the **Email Sender Name** box, type the name you wish to be displayed on this skill's outgoing emails.
- 5 Click **Update** to save your changes.



The screenshot shows the LivePerson administration interface. At the top left is the LivePerson logo and the user ID 'LP 25272558 Maya'. On the right are 'CUSTOMER CENTER' and 'LOG OUT' buttons. A navigation menu on the left includes 'News', 'Account Set Up', 'User Set Up', 'Permissions', 'Skills', 'Operators', 'Operator Groups', 'Visitor Experience', 'Content Management', 'Rules', and 'Reporting & Analytics'. The main content area is titled 'User Set Up > Skills' and contains tabs for 'Skill Groups' and 'Cross-Channel Properties'. A dropdown menu shows 'Select a Skill: Support'. The main configuration area is titled 'EDIT SKILL EMAIL PROPERTIES' and includes the following sections:

- Sender for Outbound Email:**
  - Email Address: support@finerwine.com
  - Email Sender Name: FinerWine Support Team
- Send Automatic Acknowledgements:**

An automated response email will be sent for each incoming message
- Default Mail Templates:**

Set the templates used for outgoing email sent from this skill

  - Outgoing Response Template: Default
  - Automatic Acknowledgement Template: Default
  - New Ticket - Outbound Message Template: Default
- Default Response Type for Outbound Mail:**

Set the default response type used for outgoing email sent from this skill

  - Default Response Type: Reply to All

At the bottom of the configuration area are 'Update' and 'Reset' buttons.

Figure 5: Outbound email setup

## Summary

You have completed Lesson 2: Outbound email setup. In the next lesson, you will learn how to configure your POP3 mailbox, from which emails will be polled.

## Lesson 3: POP3 mailbox configuration

### Introduction

The POP3 mailbox's function within the Ticketing system is to collect all incoming emails and distribute them to the Agent Console as tickets. You need to configure the POP3 properties, as well as define the rate at which the server will be polled (checked) for emails.

### What do you need?

- ◆ Your LivePerson account number, username and password
- ◆ The details of your POP3 email address
- ◆ **Skills** must be set in your LivePerson account.

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**Important:** *The POP3 mailbox you will use must be empty. If there are email messages on the server, they will be downloaded to the LivePerson Server and deleted from the POP3 mailbox. In addition, tickets will be created in your Agent Console for any email that may have previously existed in the POP3 mailbox.*

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### How to do it?

- 1 In the Admin Console, navigate to **Account Set Up > Settings > Email** tab.
- 2 Click on **New Server**.
- 3 Enter the POP3 email's server address in the **Server Address** field.

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**Important:** *Make sure the POP3 address entered here is the same as the one entered in Lesson 2: Outbound email setup*

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- 4 Enter the Server's **Port Number**.
- 5 Enter the **User** for this server.
- 6 Enter the **Password** for this user's account.
- 7 Enter the **Addresses** of all of the mailboxes whose emails are directed to this mailbox.



- 8 Set the **Poll Rate** (in seconds) for this server. This is the time interval at which the server will be polled for incoming emails. The recommended check rate is the default value, 600 seconds.

**Tip:** If you receive attached large files on a regular basis, set a larger time interval for polling the server for optimal performance.

- 9 Select the **Skill** for message routing.

**Important:** This step defines the distribution of tickets to skills, so it is extremely important to complete it.

- 10 Click **Update** to save your settings.

The screenshot shows the LivePerson Account Set Up interface. The user is logged in as Maya (LP 25272558). The interface is divided into a left sidebar with navigation options like News, Account Set Up, Billing, Settings, Page Code Builder, Collaboration, Online Status, Cross-Channel Set Up, Voice, Visitor Policies, User Set Up, Visitor Experience, Content Management, Rules, and Reporting & Analytics. The main content area is titled 'Account Set Up > Settings' and has tabs for Chat, Email, and Operator Console. The 'Email' tab is active, showing a form for 'ADD/EDIT POP3 SERVER'. The form includes fields for Server Address (pop.finerwine.com), Port (110), User (Support), Password (masked with dots), Mailbox(s) (support@finerwine.com), and Pollrate (seconds) (600). A 'Message Routing' section shows a dropdown menu for 'Routing Skill' set to 'Support'. Below the form are 'Update' and 'Cancel' buttons. A '\* required field' label is visible next to the Server Address field. A '\*back to top' link is at the bottom left of the form area.

Figure 6: Configuring your POP3 mailbox

## Summary

You have completed Lesson 3: POP3 mailbox configuration. Next, you will customize the standard HTML form you wish to use on your website.

## Lesson 4: Customizing the HTML form

### Introduction

You can customize HTML forms with your brand elements, as well as the data they ask customers to provide. Prompting visitors for specific data will promote first contact resolution and provide your agents with structured data they can use to resolve inquiries.

### What do you need?

- ◆ Your LivePerson account number, username and password
- ◆ **Skills** must be set in your LivePerson account.
- ◆ Any HTML code needed to customize your form. For example, your logo, any fonts you use in your website, code you wish to use for the form's header, etc.

### How to do it?

- 1 In the Admin Console, navigate to **Visitor Experience > Email > Standard Forms** tab.
- 2 Click the **New 'New Incoming Message Form'** button.
- 3 Make sure the selected **Form Type** is **New Incoming Message**.
- 4 Enter the **Form Name**. You should enter HTML code for your form's heading.

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**Tip:** *You can use this field to enter CSS into your form.*

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- 5 Add or edit the questions you would like to appear in your form. This will generate the form code that you will later embed on your website.
- 6 Click **Preview** to view the form before saving it.
- 7 Click **Submit All Changes** to save your settings. The new form is now displayed in the list of available forms. You can click on this form to edit it again.

LP 53635428  
Maya

Visitor Experience > Email

Templates Standard Forms

Select a Form Type: New Incoming Message View all Forms

You have unsaved changes.  
To save all changes to your account, please click the "Submit All Changes" button below.

**NEW INCOMING MESSAGE**

**Form Settings**

Form Name: Support Form

**Form Heading**

```
<table border="0">
<tbody>
<tr>
<td class="sectionIcon"><img
```

**Form Questions**

New Question

Order	Type	Question	Answers	Required	Visible	Delete
▼	Name	Name	<input type="text"/>	Required	✓ Hide	
▲	Email	Email Address	<input type="text"/>	Required	✓ Hide	
▼▲	Skill	Department	Default Ticket Skill	Required	✓ Hide	
▼▲	Subject	Subject	<input type="text"/>		Show	
▼▲	Message Content	Message	<input type="text"/>	Required	✓ Hide	
▲	Phone Number	Phone Number	<input type="text"/>		Show	

**Ticket Submitted Message**

This text will be displayed to the user after submitting a new message  
Use the `{LPTICKETNumber}` macro to include the ticket code as part of this text

A new ticket was created. Ticket ID is: {LPTICKETNumber}

Preview Submit All Changes Clear All Changes

Figure 7: Customizing the HTML form.

## Summary

You have completed Lesson 4: Customizing the HTML form. Next, you will tag your website with the code generated by the form you have created.

## Lesson 5: Tagging your website with the LivePerson code

### Introduction

Once the necessary configurations and settings have been completed, you will need to tag your website with the code, enabling visitors to send you emails using the form you have created and customized.

### What do you need?

- ◆ Access to your website's source code
- ◆ An HTML editor that enables you to edit the website's code

### How to do it?

- 1 In the Admin Console, navigate to **Account Set Up > Page Code Builder > Email** tab.
- 2 From the drop-down box, select the form you want to implement.
- 3 Select the code and copy it to your clipboard.
- 4 Open your preferred HTML editor and paste the code where you would like the Contact email link to be displayed.

### Summary

You have completed Lesson 5: Tagging your website with the LivePerson code.

### Unit Summary

You have learned how to implement a standard HTML form on your website. Visitors who click on a link on your website will complete this form which will then be sent as to your agents.

In the next unit, you will learn how to implement the second option, a Contact email.



## Unit 4: Implementing a Contact Email on Your Website

### *What will you learn?*

In this unit you will learn how to implement a Contact email on your website. When visitors click on the **Contact us** link, a standard email program's new outgoing message will pop up.

### *Lessons in this unit*

Lesson 1: Introduction

Lesson 2: Outbound email setup

Lesson 3: POP3 mailbox configuration

Lesson 4: Tagging your website with the LivePerson code



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## Lesson 1: Introduction

### Introduction

In this unit you will review the second implementation option, a Contact email (new outgoing message of standard email program).

### How to do it?

Let's take a closer look at the flow of email and tickets mentioned in previous units. The left-hand side of the following diagram shows the steps administrators need to perform. You will learn how to perform these steps in the next lessons. The result of each step the administrator performs is shown on the website and agent view of the flow (on the right-hand side of the following diagram).

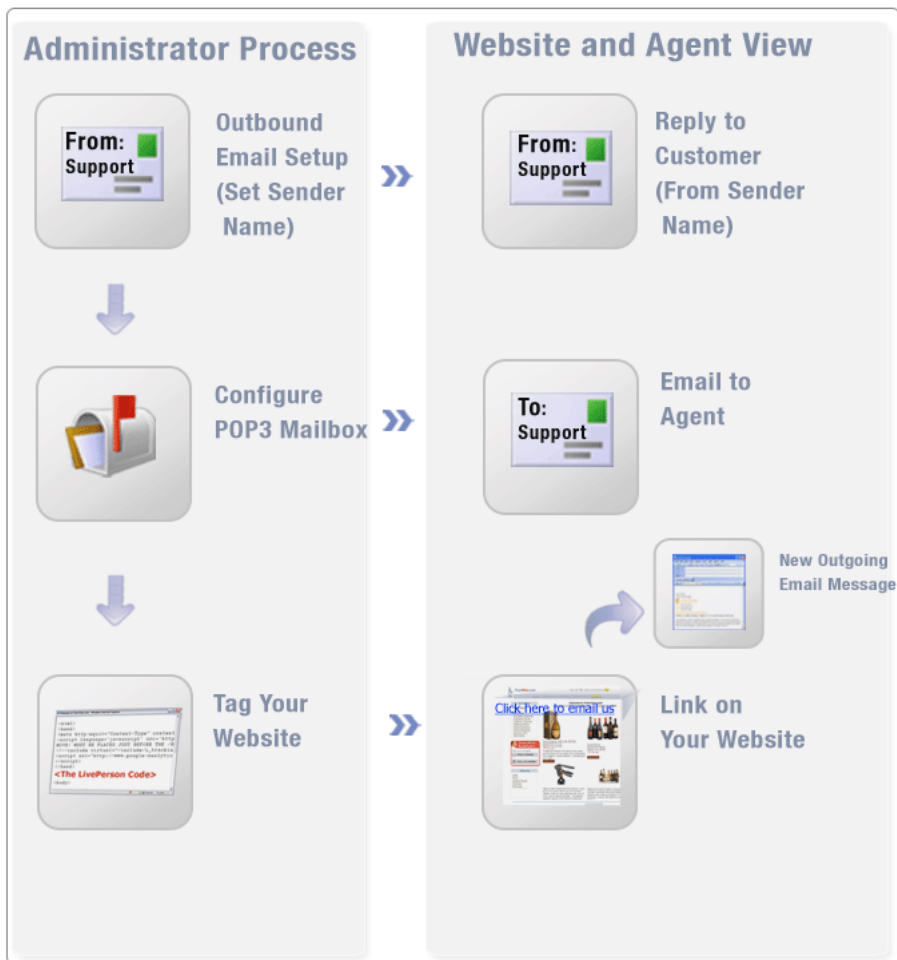


Figure 8: The email / ticket flow

## Summary

You have learned about the steps you will need to perform in order to implement the Contact email on your website and seen where each step is used within the flow. Next, you will learn how to perform the first step, Outbound email setup.



## Lesson 2: Outbound email setup

### Introduction

The **Sender Name** and **Address** appear in outbound emails that agents send to visitors (for example, FinerWine Support Team can be set as a **Sender Name**). It is important to set the **Sender Name** so that visitors receive emails with a recognizable name or skill group.

### What do you need?

- ◆ Your LivePerson account number, username and password
- ◆ **Skills** must be set in your LivePerson account
- ◆ The details of your POP3 email address

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**Important:** *The POP3 mailbox you will use must be empty. If there are email messages on the server, they will be downloaded to the LivePerson Server and deleted from the POP3 mailbox. In addition, tickets will be created in your Agent Console for any email that may have previously existed in the POP3 mailbox.*

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## How to do it?

- 1 Log into the Admin Console and navigate to **User Set Up > Skills > Cross-Channel Settings** tab.
- 2 Select the **Skill** for which we will set the **Sender Name**.
- 3 In the **Email Address** box, type the **POP3 email address** you've created and will be displayed on this skill's outgoing emails.
- 4 In the **Email Sender Name** box, type the name you wish to be displayed on this skill's outgoing emails.
- 5 Click **Update** to save your changes.

The screenshot shows the LivePerson Admin Console interface. At the top, there's a navigation bar with 'LIVEPERSON' logo, 'CUSTOMER CENTER', and 'LOG OUT' buttons. Below that, a breadcrumb trail reads 'User Set Up > Skills'. A sidebar on the left contains a menu with options like 'News', 'Account Set Up', 'User Set Up', 'Permissions', 'Skills', 'Operators', 'Visitor Experience', 'Content Management', 'Rules', and 'Reporting & Analytics'. The main content area is titled 'EDIT SKILL EMAIL PROPERTIES' and is for the 'Support' skill. It contains several sections: 'Sender for Outbound Email' with 'Email Address' (support@finerwine.com) and 'Email Sender Name' (FinerWine Support Team); 'Send Automatic Acknowledgements' (checked); 'Default Mail Templates' with dropdowns for 'Outgoing Response Template', 'Automatic Acknowledgement Template', and 'New Ticket - Outbound Message Template'; and 'Default Response Type for Outbound Mail' with a dropdown set to 'Reply to All'. 'Update' and 'Reset' buttons are at the bottom.

Figure 9: Outbound email setup

## Summary

You have completed Lesson 2: Outbound email setup. In the next lesson, you will configure your POP3 mailbox, from which inbound emails will be polled.

## Lesson 3: POP3 mailbox configuration

### Introduction

The POP3 mailbox's function within the Ticketing system is to collect all incoming emails and distribute them to the Agent Console as tickets. You need to configure the POP3 properties, as well as define the rate at which the server will be polled (checked) for emails.

### What do you need?

- ◆ Your LivePerson account number, username and password
- ◆ The details of your POP3 email address
- ◆ **Skills** must be set in your LivePerson account.

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**Important:** *The POP3 mailbox you will use must be empty. If there are email messages on the server, they will be downloaded to the LivePerson Server and deleted from the POP3 mailbox. In addition, tickets will be created in your Agent Console for any email that may have previously existed in the POP3 mailbox.*

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### How to do it?

- 1 In the Admin Console, navigate to **Account Set Up > Settings > Email** tab.
- 2 Click on **New Server**.
- 3 Enter the POP3 email's server address in the **Server Address** field.

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**Important:** *Make sure the POP3 address entered here is the same as the one you've entered in Lesson 2: Outbound email setup.*

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- 4 Enter the Server's Port number.
- 5 Enter the **User** for this server.
- 6 Enter the **Password** for this user's account.
- 7 Enter the **Email addresses** of all of the mailboxes whose emails are directed to this mailbox.



- 8 Set the **Poll Rate** (in seconds) for this server. This is the time interval at which the server will be polled for incoming emails. The recommended poll rate is the default value, 600 seconds.

**Tip:** *If you receive attached large files on a regular basis, set a larger time interval for polling the server for optimal performance.*

- 9 Select the **Skill** for message routing.

**Important:** *This step defines the distribution of tickets to skills, so it is extremely important to complete it.*

- 10 Click **Update** to save your settings.

The screenshot shows the LivePerson Account Set Up interface. The user is logged in as Maya (LP 25272558). The interface is divided into a left sidebar with navigation options like News, Account Set Up, Billing, Settings, Page Code Builder, Collaboration, Online Status, Cross-Channel Set Up, Voice, Visitor Policies, User Set Up, Visitor Experience, Content Management, Rules, and Reporting & Analytics. The main content area is titled 'Account Set Up > Settings' and has tabs for Chat, Email, and Operator Console. The 'Email' tab is active, showing a configuration page for 'ADD/EDIT POP3 SERVER'. The form includes fields for Server Address (pop.finerwine.com), Port (110), User (Support), Password (masked with asterisks), Mailbox(s) (support@finerwine.com), and Pollrate (seconds) (600). A 'Message Routing' section has a 'Routing Skill' dropdown set to 'Support'. Below the form are 'Update' and 'Cancel' buttons. A '\* required field' label is visible in the top right of the form area. A '\*back to top' link is at the bottom left of the form area.

Figure 10: POP3 mail configuration

## Summary

You have completed Lesson 3: POP3 mailbox configuration. Next, you will tag your website with the LivePerson code.

## Lesson 4: Tagging your website with the LivePerson code

### *Introduction*

Once the necessary configurations and settings have been completed, you need to tag your website with the code that will enable visitors to send you emails.

### *What do you need?*

- ◆ Access to your website's source code
- ◆ An HTML editor that enables you to edit the website's code

### *How to do it?*

Open your preferred HTML editor and embed the code for opening a new outgoing message where you want the link to be shown on your website.

### *Summary*

You have completed Lesson 4: Tagging your website with the LivePerson code.

### *Unit Summary*

You have learned how to implement a Contact email on your website. Visitors who click on the link you embed on your website will send your agents an email message using their email program.



## Appendix A: Tips and Recommended Best Practices

- ◆ The POP3 mailbox you will use must be empty. If there are email messages on the server, they will be downloaded to the LivePerson Server and deleted from the POP3 mailbox. In addition, tickets will be created in your Agent Console for any email that may have previously existed in the POP3 mailbox.
- ◆ If you receive attached large files on a regular basis, set a larger time interval for polling the server for optimal performance.
- ◆ If you do not wish to allow customers to attach documents and files to incoming email forms, you can disable this option during Lesson 4: Customizing the HTML form. Uncheck **Allow attachments in inbound messages**.
- ◆ You can use JavaScript or CSS in your HTML form.
- ◆ Include a **Chat button** in your outbound emails to enable visitors to contact you via chat. [Click here](#) for implementation instructions.
- ◆ [Click here](#) to learn about secure email options.
- ◆ Does your company use a protocol different than POP3? [Learn](#) about compatibility with other protocols.



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