

## How to set up and test Livefluence Invitations and Triggers

In order to set up and test Livefluence invitations and triggers without effecting your production account, you will need to set up a test department, assign an agent to that department, deploy a department specific visitor monitoring script, a department specific chat button, create the invitation, and create and assign the trigger to the invitation.

Steps in the Velaro control panel (<http://login.velaro.com>):

Create department: Account > Departments > New

Assign agents: Account > Departments > Working on: Select department name > Department Users Tab > Add agent to department

*\*Copy down the department ID (located in the URL bar on the browser window. It will look like this: <http://login.velaro.com/Default.aspx?tabid=164&deptid=XXXX> - where XXXX is your department ID.*

Deploy Visitor Monitoring Code: Website > Visitor Monitoring > Department Tab: Select department name > Copy code to clipboard > Paste code into HTML page

Deploy Chat Button Code: Engage > Design > Working on: Select department name > Copy code to clipboard > Paste into HTML page

Create/Modify the Invitation: Website > Invitations > Add new invitation (+ sign) or edit an existing invitation (pencil icon)

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<!-- /* Font Definitions */ @font-face{font-family:"Cambria Math";panose-1:2 4 5 3 5 4 6 3 2 4;mso-
font-charset:1;mso-generic-font-family:roman;mso-font-format:other;mso-font-pitch:variable;mso-
font-signature:0 0 0 0 0 0;}@font-face{font-family:Calibri;panose-1:2 15 5 2 2 2 4 3 2 4;mso-font-
charset:0;mso-generic-font-family:swiss;mso-font-pitch:variable;mso-font-signature:-1610611985
1073750139 0 0 159 0;} /* Style Definitions */ p.MsoNormal, li.MsoNormal, div.MsoNormal{mso-
style-unhide:no;mso-style-qformat:yes;mso-style-parent:"";margin:0in;margin-bottom:.0001pt;mso-
pagination:widow-orphan;font-size:11.0pt;font-family:"Calibri", "sans-serif";mso-fareast-font-
family:Calibri;mso-fareast-theme-font:minor-latin;mso-bidi-font-family:"Times New
Roman";}p.MsoListParagraph, li.MsoListParagraph, div.MsoListParagraph{mso-style-
priority:34;mso-style-unhide:no;mso-style-qformat:yes;margin-top:0in;margin-right:0in;margin-
bottom:0in;margin-left:.5in;margin-bottom:.0001pt;mso-pagination:widow-orphan;font-
size:11.0pt;font-family:"Calibri", "sans-serif";mso-fareast-font-family:Calibri;mso-fareast-theme-
font:minor-latin;mso-bidi-font-family:"Times New Roman"};MsoChpDefault{mso-style-type:export-
only;mso-default-props:yes;font-size:10.0pt;mso-ansi-font-size:10.0pt;mso-bidi-font-
size:10.0pt;}@page Section1{size:8.5in 11.0in;margin:1.0in 1.0in 1.0in 1.0in;mso-header-
margin:.5in;mso-footer-margin:.5in;mso-paper-source:0;}div.Section1{page:Section1;} /* List
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Definitions \*/ @list l0{mso-list-id:1597520042;mso-list-type:hybrid;mso-list-template-ids:-1041973520 -1275163092 67698713 67698715 67698703 67698713 67698715 67698703 67698713 67698715;}@list l0:level1{mso-level-tab-stop:none;mso-level-number-position:left;text-indent:-.25in;mso-fareast-font-family:"Times New Roman";}@list l0:level2{mso-level-number-format:alpha-lower;mso-level-tab-stop:none;mso-level-number-position:left;text-indent:-.25in;}@list l0:level3{mso-level-tab-stop:1.5in;mso-level-number-position:left;text-indent:-.25in;}@list l0:level4{mso-level-tab-stop:2.0in;mso-level-number-position:left;text-indent:-.25in;}@list l0:level5{mso-level-tab-stop:2.5in;mso-level-number-position:left;text-indent:-.25in;}@list l0:level6{mso-level-tab-stop:3.0in;mso-level-number-position:left;text-indent:-.25in;}@list l0:level7{mso-level-tab-stop:3.5in;mso-level-number-position:left;text-indent:-.25in;}@list l0:level8{mso-level-tab-stop:4.0in;mso-level-number-position:left;text-indent:-.25in;}@list l0:level9{mso-level-tab-stop:4.5in;mso-level-number-position:left;text-indent:-.25in;}ol{margin-bottom:0in;}ul{margin-bottom:0in;}-->Create the Trigger: Analytics> Triggers > Add New or Edit > Expression Editor >(AgentRequestedChat == True) && AnyAgentAvailableDept(Department ID) ==True

*\*It is important to put in the department ID of the department you created. This is the minimal rule needed to get your invitation to fire. You can of course add more complex parameters to the rule if needed*

Assign the Invitation to this Trigger: Analytics> Triggers > Add New or Edit > Assign Actions > Select Available Action to the Selected Actions pane.

You should now be able to place your HTML page on the web and test is as needed.

Last Modified By: Chad, Tuesday, November 03, 2009  
<http://kb.velaro.com/KnowledgebaseArticle10164.aspx>

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