

Vergic Engage and Vergic Chat – Configuration guide Opportunities – Solutions - Banners

1 VERSION MANAGEMENT

Version	Date	Author	Comments
1	2016-09-01	Olav Grytli	Version 1 – Configuration guide Opportunities, Solution Banners
2	2016-10-14	Olav Grytli	Version 2 – Adding “How to add Injectedbanner (Phone2web) to a website”

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2 Document purpose

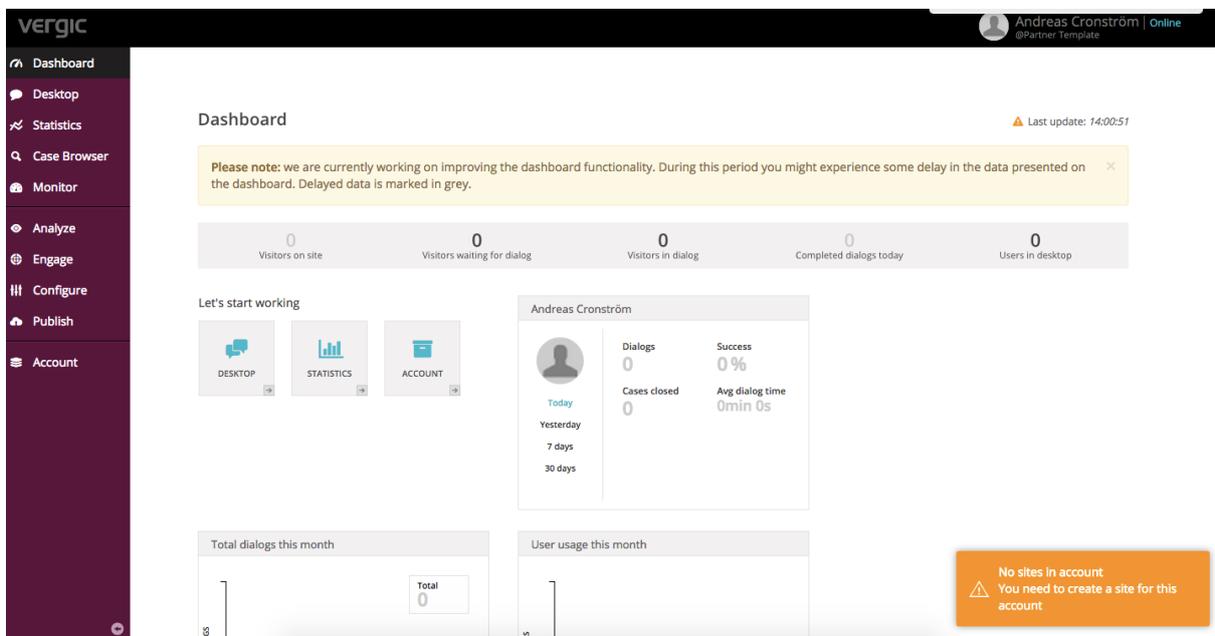
This document is part of the Vergic Engage documentation.

This document intends to explain the steps to adjust and create configuration of opportunities, solutions and banners. The intended audience is administrators with good knowledge of Web development.

This document presume that the reader has competence of Vergic Engage Platform thru training in advanced configuration. The document also presume that the reader has an understanding of Vergic Engage concepts from product information and presentation material.

3 Account configuration

Account configuration is initiated by signing into an existing account that you have been granted access to, or by delegating yourself into a newly created account from a parent account. In both cases trust or local rights are needed.



The screenshot shows the Vergic Engage dashboard for user Andreas Cronström. The dashboard includes a navigation menu on the left with options like Dashboard, Desktop, Statistics, Case Browser, Monitor, Analyze, Engage, Configure, Publish, and Account. The main content area displays a 'Dashboard' header with a 'Last update: 14:00:51' timestamp. A yellow notification box states: 'Please note: we are currently working on improving the dashboard functionality. During this period you might experience some delay in the data presented on the dashboard. Delayed data is marked in grey.' Below this, there are five summary cards: 'Visitors on site' (0), 'Visitors waiting for dialog' (0), 'Visitors in dialog' (0), 'Completed dialogs today' (0), and 'Users in desktop' (0). A 'Let's start working' section offers buttons for 'DESKTOP', 'STATISTICS', and 'ACCOUNT'. A user profile card for 'Andreas Cronström' shows 'Dialogs' (0), 'Cases closed' (0), 'Success' (0%), and 'Avg dialog time' (0min 0s). At the bottom, there are two empty charts for 'Total dialogs this month' and 'User usage this month'. An orange warning box in the bottom right corner says: 'No sites in account. You need to create a site for this account.'

4 Advanced configuration

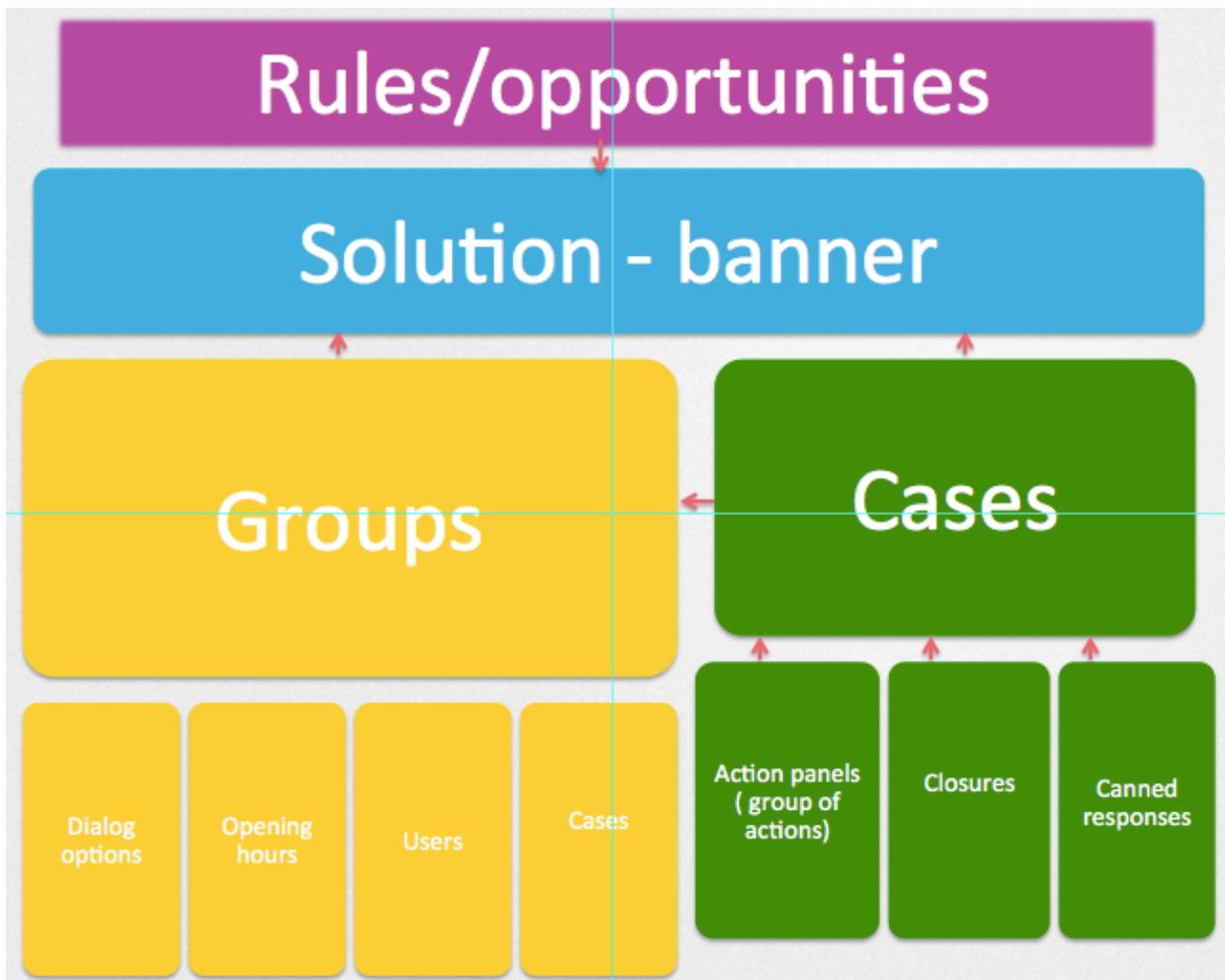
Opportunities - Solutions - Banners

Before starting any configuration you need a detailed project definition (from the workshop).

Which processes and visitors do the client want to prioritize, all or just specific segments? Type of banner (banner template)? How should the banner behave?

Implementing the design of a banner is often the most time consuming part. Start by creating a design suggestion from workshop discussions and present it to the customer (design contact). Get a sign off from the client for design and copy.

Below you can see an illustration of the hierarchy of the different settings and relations in the configuration.



4.1 Create an opportunity

Opportunities/rules are often a URL (match/contains etc.) but can also be more a sophisticated rules to offer contact in specific processes or for specific visitor/behavior. The easiest rule is: contains "/" since all URL contains /. With this rule the solution will be activated on all pages and be displayed for every visitor on the site (if agents are available for dialogs)

Advanced: Account JS - Point Of Interest – Trigger on specific site HTML elements - returning visitors – or anything else that’s available on the client (browser) you need JavaScript skills.

Create new opportunity

Opportunities
 Points of interest

Opportunities

Opportunities can be set up to track or act on certain actions a visitor takes, i.e. navigating to contact page, loading contact form, having errors in checkout and so on.

[Prioritizing opportunities](#)
 The most advanced and complexed opportunities should be on top of the list. This way the rules that is most specifik will trigger first and the solution and banner will be activated before are more common rule.

List of opportunities for working site

+ New opportunity
←

Priority	Saved priority	Name	Solutions in use
1	1	Migra demo	Demo Phone2Web
2	2	Left loan application	Displayed phone to web Proposed loan application support
3	3	Left mutual funds	Displayed phone to web Proposed mutual funds support
4	4	Browsing business	Displayed phone to web Proposed business support
5	5	Browsing startpage	Offered support Displayed phone to web
6	6	Browsing loans	Displayed phone to web Offered loan support Proactive loan support
7	7	Browsing payments	Displayed phone to web Offered payment support
8	8	Entered online-meeting	Displayed phone to web Offered online meeting
9	9	Seeks contact	Displayed phone to web Offered contact Proposed contact
10	10	Browsing mutual funds	Displayed phone to web

Configure the opportunity

Opportunities
 Points of interest

← Edit opportunity: Left loan application

Name: [Create a descriptive name](#)

Description: [N/A](#)

Score: [Score when visitor hits this oport.](#)

Operator	Point of interest	Criteria	Operator	Value
	<input type="text" value="Navigation"/>	<input type="text" value="History Page 1"/>	<input type="text" value="Contains"/>	<input type="text" value="bankdemo.vergic"/>
<input type="text" value="And"/>	<input type="text" value="Navigation"/>	<input type="text" value="Current Page"/>	<input type="text" value="Does Not Contain"/>	<input type="text" value="bankdemo.vergic"/> X

[+ Add condition](#) [Create rule - this example the visitor has left an application on the site](#)

Select which solutions to activate with this opportunity

Available		Selected
Demo Phone2Web	←	Displayed phone to web
Displayed online meeting codestarter	→	Proposed loan application support
Offered account support		
Offered contact		
Offered loan application support		

Set priority of solutions

Priority	Name	
1	Displayed phone to web	Evaluates the solutions in order of priority. OBS Only one tab banner can be rendered on the site at the same time.
2	Proposed loan application support	

Advanced

[Not in use for the moment](#)

Exported filter string to send to server

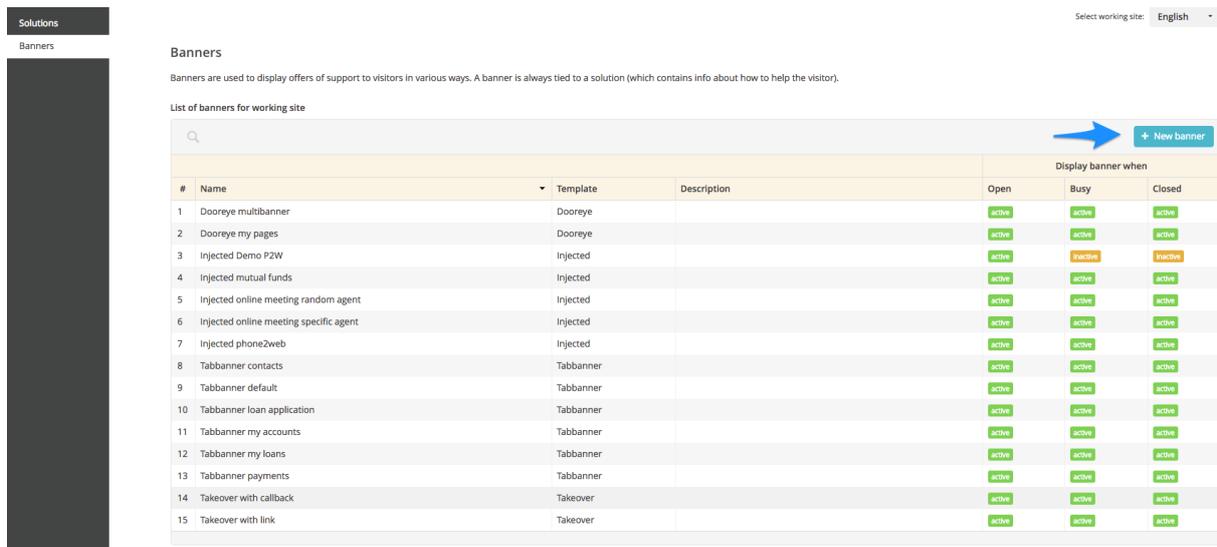
Additional function needed for expression

[Compile to JS](#)

4.2 Configure a banner + Phone2Web

1. Navigation path: Engage -> Solution -> Banner
2. Create new banner
3. Select banner template (required)
 - If you have CSS skills we use a pre compiler called LESS. (CSS tab)
 - Next step is to configure State (Settings tab) - Behavior (Intro tab) - Text, Text keys (HTML tab)

Create a new banner



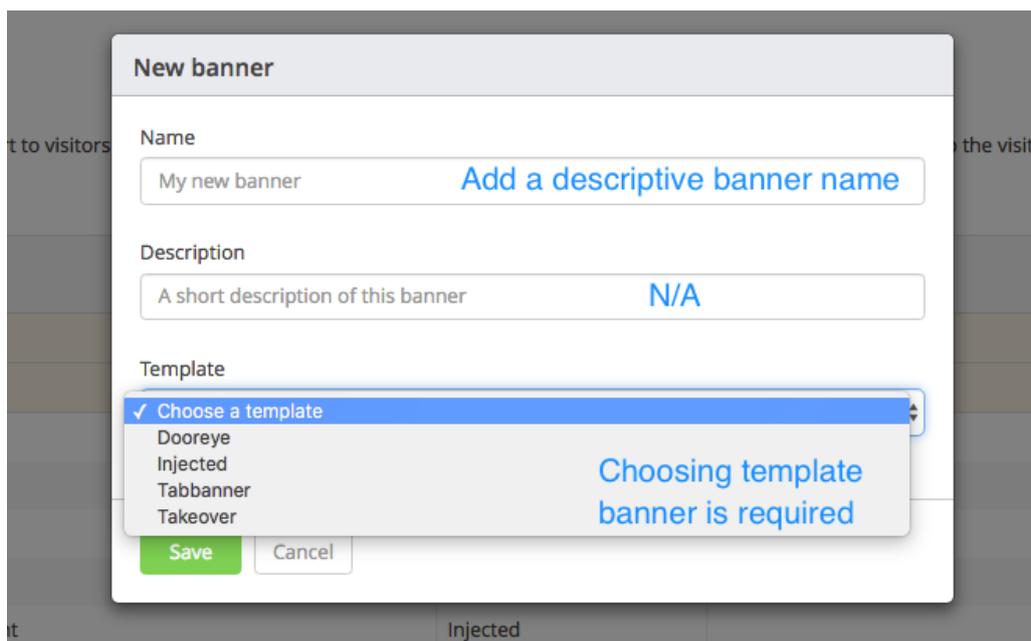
Banners

Banners are used to display offers of support to visitors in various ways. A banner is always tied to a solution (which contains info about how to help the visitor).

List of banners for working site

#	Name	Template	Description	Display banner when		
				Open	Busy	Closed
1	Dooreye multibanner	Dooreye		active	active	active
2	Dooreye my pages	Dooreye		active	active	active
3	Injected Demo P2W	Injected		active	inactive	inactive
4	Injected mutual funds	Injected		active	active	active
5	Injected online meeting random agent	Injected		active	active	active
6	Injected online meeting specific agent	Injected		active	active	active
7	Injected phone2web	Injected		active	active	active
8	Tabbanner contacts	Tabbanner		active	active	active
9	Tabbanner default	Tabbanner		active	active	active
10	Tabbanner loan application	Tabbanner		active	active	active
11	Tabbanner my accounts	Tabbanner		active	active	active
12	Tabbanner my loans	Tabbanner		active	active	active
13	Tabbanner payments	Tabbanner		active	active	active
14	Takeover with callback	Takeover		active	active	active
15	Takeover with link	Takeover		active	active	active

Add name and banner template (required)



New banner

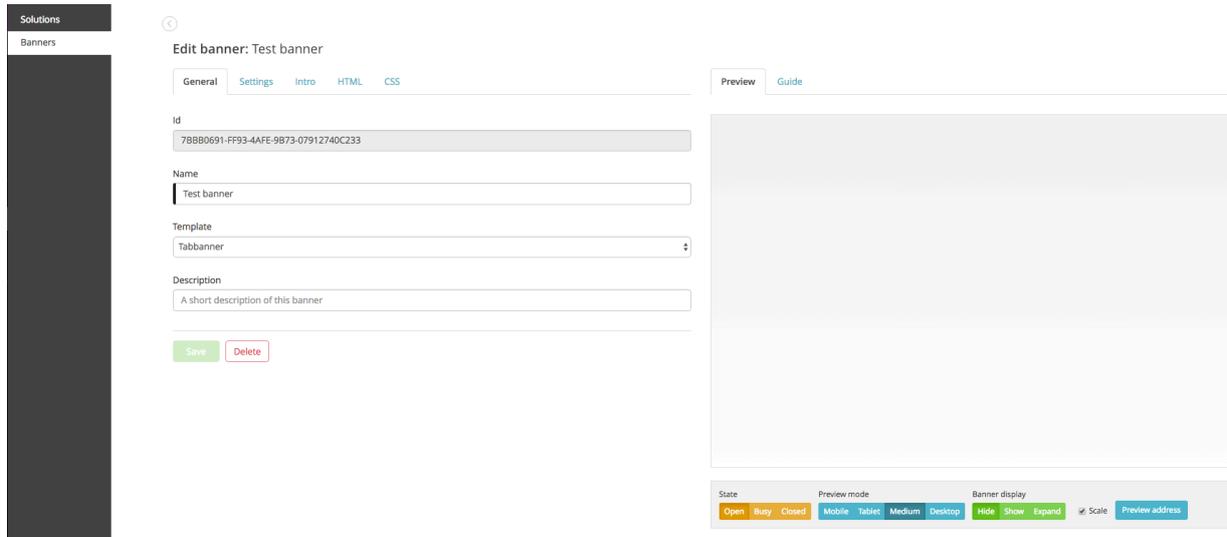
Name
 My new banner Add a descriptive banner name

Description
 A short description of this banner N/A

Template
 ✓ Choose a template
 Dooreye
 Injected
 Tabbanner
 Takeover Choosing template banner is required

Save Cancel

Edit General



Solutions
Banners

◀

Edit banner: Test banner

General Settings Intro HTML CSS

Preview Guide

Id
78BB0691-FF93-4AFE-9B73-07912740C233

Name
Test banner

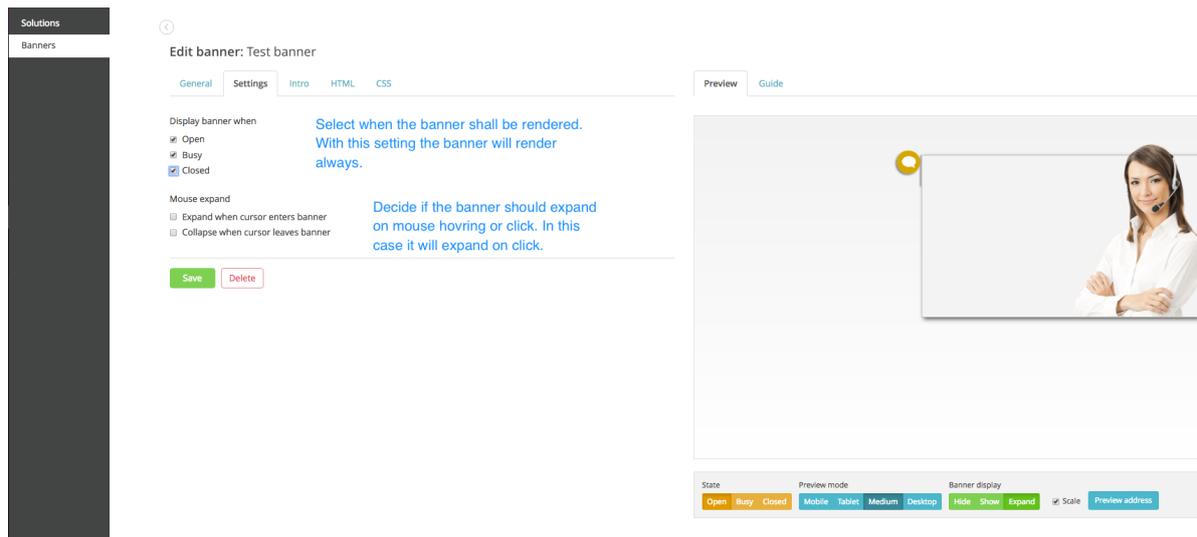
Template
Tabbanner

Description
A short description of this banner

Save Delete

State: Open Busy Closed
 Preview mode: Mobile Tablet Medium Desktop
 Banner display: Hide Show Expand Scale
 Preview address

Edit settings



Solutions
Banners

◀

Edit banner: Test banner

General Settings Intro HTML CSS

Preview Guide

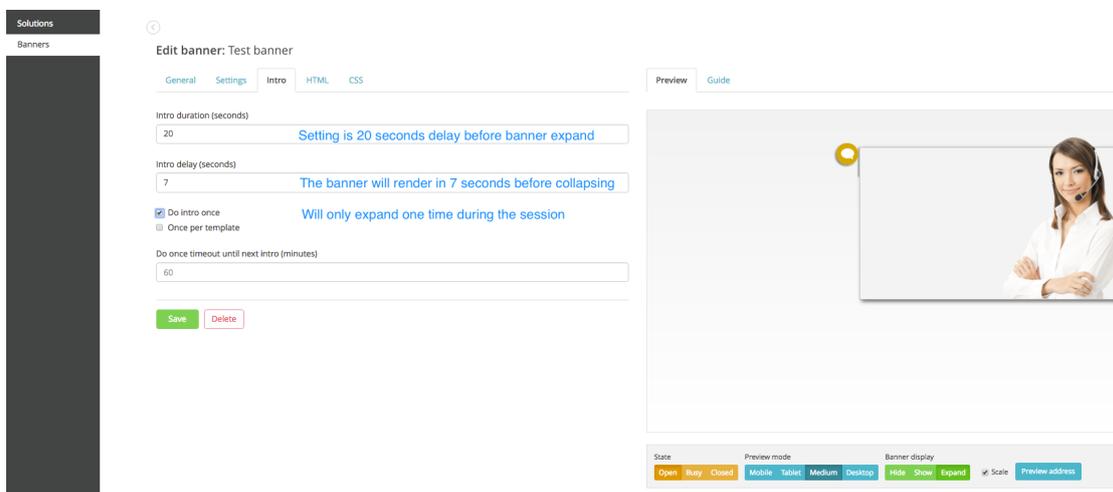
Display banner when
 Open
 Busy
 Closed
 Select when the banner shall be rendered. With this setting the banner will render always.

Mouse expand
 Expand when cursor enters banner
 Collapse when cursor leaves banner
 Decide if the banner should expand on mouse hovering or click. In this case it will expand on click.

Save Delete

State: Open Busy Closed
 Preview mode: Mobile Tablet Medium Desktop
 Banner display: Hide Show Expand Scale
 Preview address

Edit Intro



Solutions
Banners

◀

Edit banner: Test banner

General Settings Intro HTML CSS

Preview Guide

Intro duration (seconds)
20
Setting is 20 seconds delay before banner expand

Intro delay (seconds)
7
The banner will render in 7 seconds before collapsing

Do intro once
 Once per template
 Will only expand one time during the session

Do once timeout until next intro (minutes)
60

Save Delete

State: Open Busy Closed
 Preview mode: Mobile Tablet Medium Desktop
 Banner display: Hide Show Expand Scale
 Preview address

Edit HTML

Solutions

Banners

Edit banner: Test banner

General Settings Intro **HTML** CSS

Preview Guide

Wrapper additional class names

example-class extra-wide

Adding a new custom class to the banner parent HTML element. Custom styling for individual banner.

Tab HTML

Chat with us now

Edit the tab text

HTML

```
1 <h1>Behöver du hjälp? </h1>
2 <h3>Chatta med oss</h3>
3 <button class="vngage-btn" data-vngage-banner="join">Start chat </button>
```

Text key name

title

Text key value

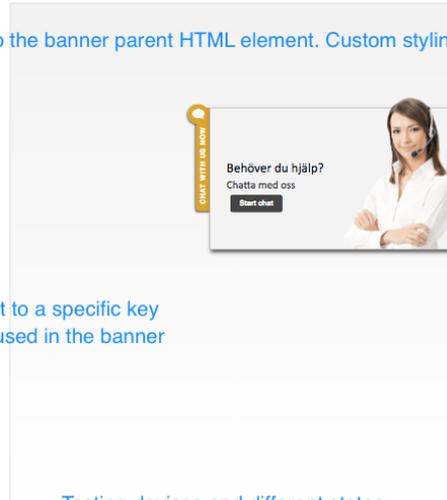
Text value for this key na

Add banner text key

Adding a text to a specific key that can be used in the banner HTML

Save

Delete



Testing devices and different states

State Preview mode

Open Busy Closed Mobile Tablet Medium Desktop

Banner display

Hide Show Expand Scale Preview address

How to add Injectedbanner (Phone2web) to a website

Start by finding a HTML element you want to inject the Injectedbanner (Phone2web) in:

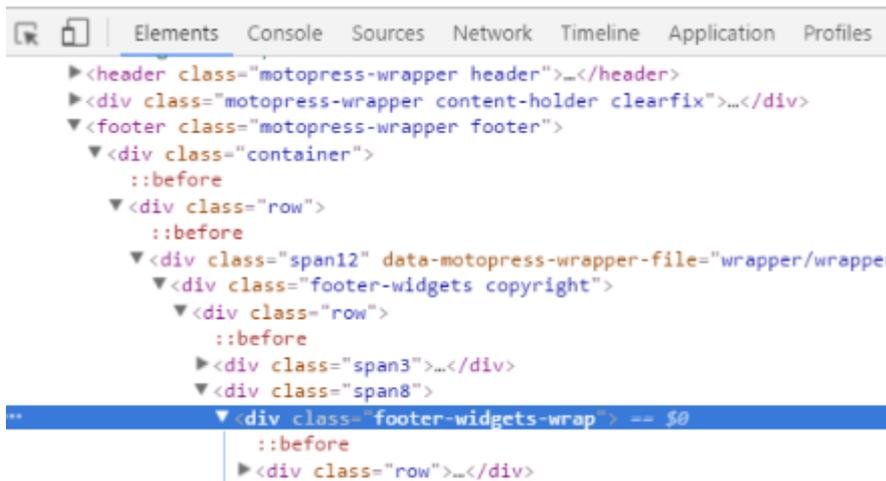
1. Open up your website in Chrome and press F12 (this will fire up the developer tools).
2. Go to *Elements* and choose an HTML id or class (see picture 1.1).
3. In the picture 1.1 we've selected and HTML element with the class "footer-widget-wrap".

When we have an element, we need to apply it to a banner configuration:

1. Create a new injected banner, in Engage->Banners->New banner->Template->Injected.
2. Go to HTML tab->Injection selector and add ".footer-widget-wrap" (see picture 1.2).

Notice the dot before ".footer-widget-wrap", if it's a HTML class you need to use a dot, for ID's you should use a hash "#footer-widget-wrap". Other than this, it's the same procedure as a normal banner (tabbanner, takeover etc).

Picture 1.1



Picture 1.2

Edit banner: Phone2web

General Settings Intro **HTML** CSS

Wrapper additional class names

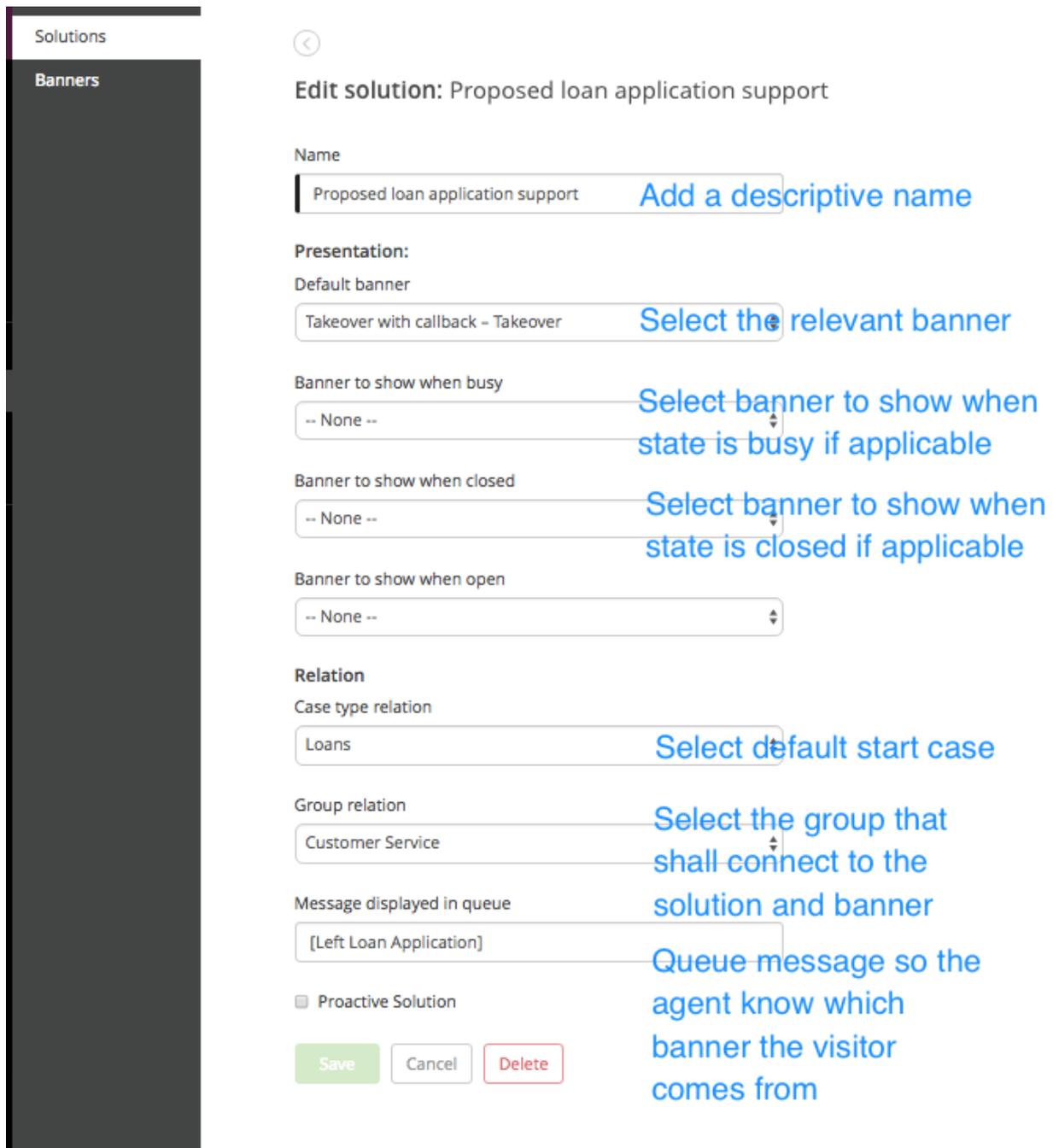
Wrapper HTML tag

Injection selector

Injection method

4.3 Configure a solution

- Group relation
- Case relations
- Banner for different group states (open, busy or closed) A solution can have more than one banner, either one default banner, or different banners in different states.



The screenshot shows the 'Edit solution' interface for 'Proposed loan application support'. On the left, a sidebar contains 'Solutions' and 'Banners'. The main content area includes the following configuration sections:

- Name:** A text field containing 'Proposed loan application support' with a blue annotation 'Add a descriptive name' pointing to it.
- Presentation:**
 - Default banner:** A dropdown menu with 'Takeover with callback - Takeover' selected, annotated with 'Select the relevant banner'.
 - Banner to show when busy:** A dropdown menu with '-- None --' selected, annotated with 'Select banner to show when state is busy if applicable'.
 - Banner to show when closed:** A dropdown menu with '-- None --' selected, annotated with 'Select banner to show when state is closed if applicable'.
 - Banner to show when open:** A dropdown menu with '-- None --' selected.
- Relation:**
 - Case type relation:** A dropdown menu with 'Loans' selected, annotated with 'Select default start case'.
 - Group relation:** A dropdown menu with 'Customer Service' selected, annotated with 'Select the group that shall connect to the solution and banner'.
 - Message displayed in queue:** A text field containing '[Left Loan Application]', annotated with 'Queue message so the agent know which banner the visitor comes from'.
- Proactive Solution:** A checkbox that is currently unchecked.

At the bottom, there are three buttons: 'Save' (green), 'Cancel' (grey), and 'Delete' (red).

Connect solution to opportunities

Opportunities
 Points of Interest

Description:

Score:

Operator	Point of interest	Criteria	Operator	Value
	<input type="text" value="Navigation"/>	<input type="text" value="History Page 1"/>	<input type="text" value="Contains"/>	<input type="text" value="bankdemo.verg"/>
<input type="text" value="And"/>	<input type="text" value="Navigation"/>	<input type="text" value="Current Page"/>	<input type="text" value="Does Not Cont"/>	<input type="text" value="bankdemo.verg"/> X

+ Add condition

Select which solutions to activate with this opportunity

Available 🔍

- Demo Phone2Web
- Displayed online meeting codestarter
- Offered account support
- Offered contact
- Offered loan application support
- Offered loan support
- Offered multibanner support
- Offered mutual funds support

<<
>>

Selected 🔍

- Displayed phone to web
- Proposed loan application support

Select the solution for the opportunity.

You can use several solutions if the banner type is not the same e.g. You can't use two Tab banners but its ok to use one tab-banner and one take-over or injected banner

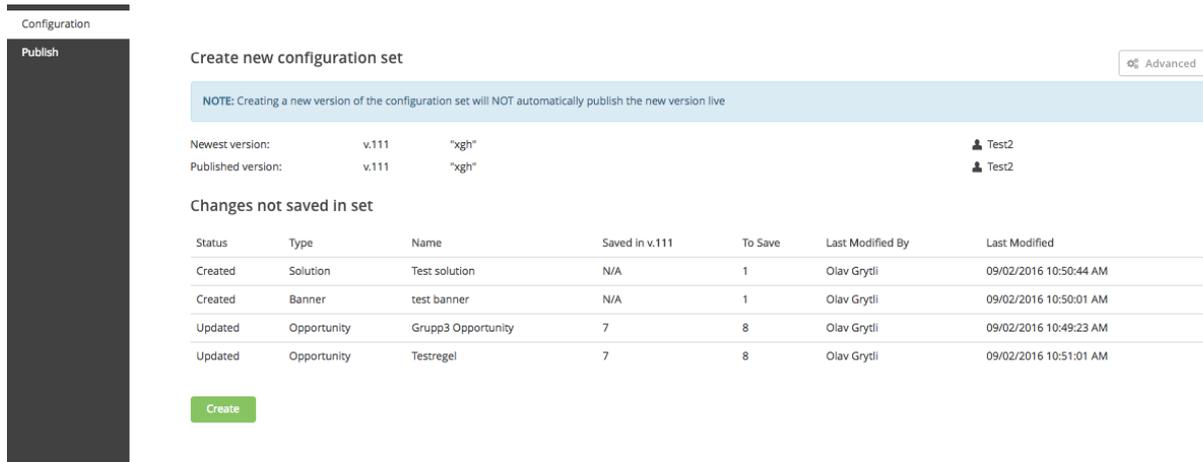
Set priority of solutions

4.4 Go live

Great job so far!

Now you are ready to save the configuration set and test it on the client's site.

Save configuration set



Configuration

Publish

Create new configuration set

NOTE: Creating a new version of the configuration set will NOT automatically publish the new version live

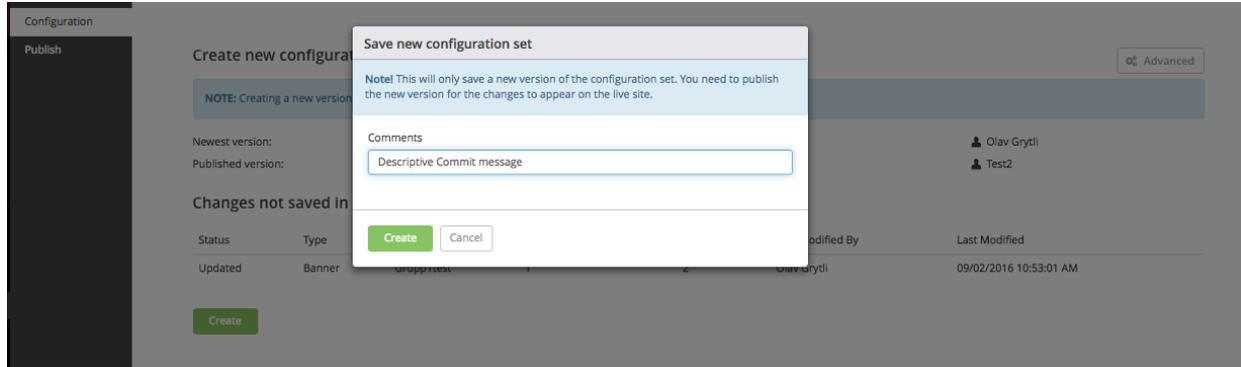
Newest version: v.111 "xgh" Test2
 Published version: v.111 "xgh" Test2

Changes not saved in set

Status	Type	Name	Saved in v.111	To Save	Last Modified By	Last Modified
Created	Solution	Test solution	N/A	1	Olav Grytli	09/02/2016 10:50:44 AM
Created	Banner	test banner	N/A	1	Olav Grytli	09/02/2016 10:50:01 AM
Updated	Opportunity	Grupp3 Opportunity	7	8	Olav Grytli	09/02/2016 10:49:23 AM
Updated	Opportunity	Testregel	7	8	Olav Grytli	09/02/2016 10:51:01 AM

Create

Add a descriptive commit message



Configuration

Publish

Create new configuration set

NOTE: Creating a new version of the configuration set will NOT automatically publish the new version live

Newest version: v.111 "xgh" Olav Grytli
 Published version: v.111 "xgh" Test2

Changes not saved in set

Status	Type	Name	Saved in v.111	To Save	Last Modified By	Last Modified
Updated	Banner	test banner	N/A	1	Olav Grytli	09/02/2016 10:53:01 AM

Create

Save new configuration set

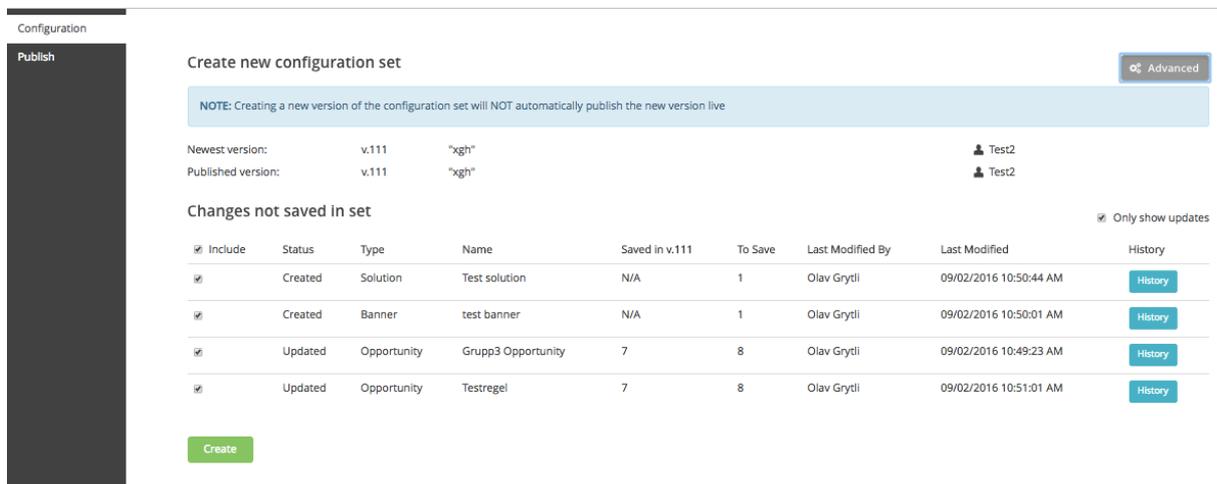
Note! This will only save a new version of the configuration set. You need to publish the new version for the changes to appear on the live site.

Comments

Descriptive Commit message

Create Cancel

If needed select items to save for the configuration set. Click Advanced to get this option.



Configuration

Publish

Create new configuration set

NOTE: Creating a new version of the configuration set will NOT automatically publish the new version live

Newest version: v.111 "xgh" Test2
 Published version: v.111 "xgh" Test2

Changes not saved in set

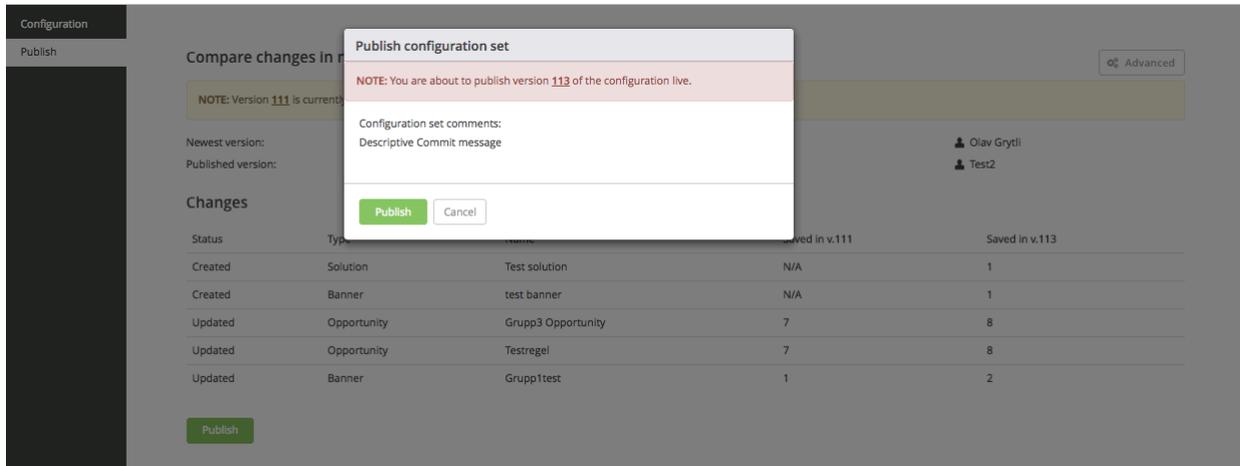
Only show updates

<input checked="" type="checkbox"/> Include	Status	Type	Name	Saved in v.111	To Save	Last Modified By	Last Modified	History
<input checked="" type="checkbox"/>	Created	Solution	Test solution	N/A	1	Olav Grytli	09/02/2016 10:50:44 AM	History
<input checked="" type="checkbox"/>	Created	Banner	test banner	N/A	1	Olav Grytli	09/02/2016 10:50:01 AM	History
<input checked="" type="checkbox"/>	Updated	Opportunity	Grupp3 Opportunity	7	8	Olav Grytli	09/02/2016 10:49:23 AM	History
<input checked="" type="checkbox"/>	Updated	Opportunity	Testregel	7	8	Olav Grytli	09/02/2016 10:51:01 AM	History

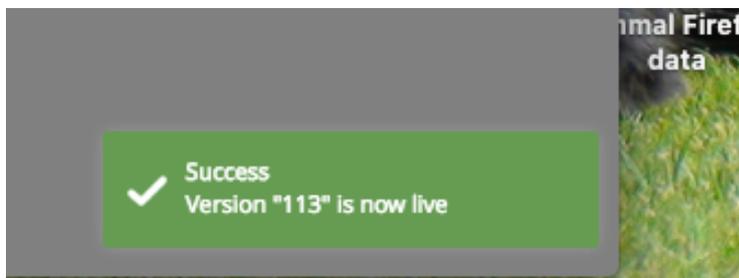
Create

Publish the changes or to go live

If an agent now logs in and the status is online the solution will be activated and the banner will render on clients site.



You should now get a system message that verifies that everything went well and what version of VEP that is live.



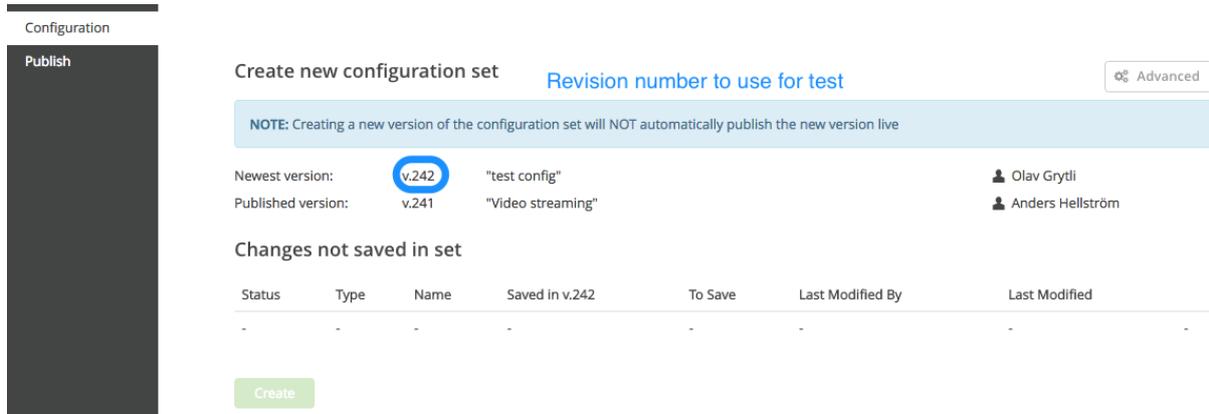
4.5 Test configuration and changes with vngageRevision

Everything that has an impact on the client's website can be tested with by adding a parameter in the URL.

Here are step by step instructions.

1. Open a new browser or restart the existing one.
2. Login to and navigate to desktop.
3. On a new tab within the browser, go to this url: [[URL for visitor side where the banner should be]?vngageRevision=[nr]] e.g. [https://bankdemo.vergic.com/mypages/my-payments/?vngageRevision=\[number, see image below\]](https://bankdemo.vergic.com/mypages/my-payments/?vngageRevision=[number, see image below])

Where is the revision number?



Configuration

Publish

Create new configuration set Revision number to use for test Advanced

NOTE: Creating a new version of the configuration set will NOT automatically publish the new version live

Newest version: **v.242** "test config" Olav Grytl
 Published version: v.241 "Video streaming" Anders Hellström

Changes not saved in set

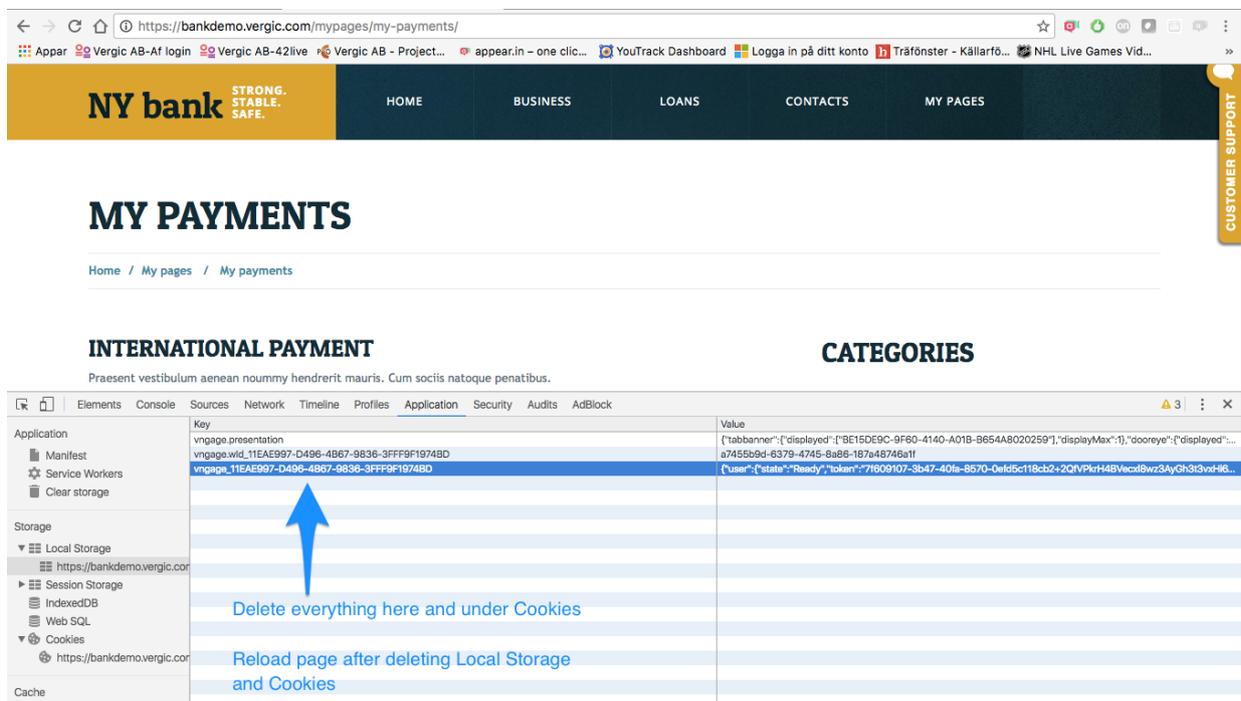
Status	Type	Name	Saved in v.242	To Save	Last Modified By	Last Modified
-	-	-	-	-	-	-

Create

4. Start the chat from both sides.

* If the banner won't show, try reloading the page.

* If the banner still won't be displayed then try deleting the sessions and cookies by pressing F12 (on PC, for MAC right click and select inspect) in your browser. Select Application, and then remove all the sessions and cookies within storage (See example)



https://bankdemo.vergic.com/mypages/my-payments/

NY bank STRONG. STABLE. SAFE. HOME BUSINESS LOANS CONTACTS MY PAGES CUSTOMER SUPPORT

MY PAYMENTS

Home / My pages / My payments

INTERNATIONAL PAYMENT

Præsent vestibulum aenean noummy hendrerit mauris. Cum sociis natoque penatibus.

CATEGORIES

Application

Key	Value
vngage.presentation	{ "tabBanner": { "displayed": { "BE1EDE9C-9F60-4140-A01B-B654A8020259": { "displayMax": 1, "dooreye": { "displayed": ...
vngage.wild_11EAE997-D496-4B67-9836-3FFF9F1974BD	a7455b9d-6379-4745-8a86-187a48746a1f
vngage_11EAE997-D496-4B67-9836-3FFF9F1974BD	{ "user": { "state": "Ready", "token": "71609107-3b47-406e-8570-0ef15c118cb2+2QIVPkrH4BVecd8wz3AyGh3t3vof46...

Delete everything here and under Cookies

Reload page after deleting Local Storage and Cookies

