Sales-n-Stats

Website Monitoring and Analysis Software

Reference Manual

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This is the Reference Manual for Sales-n-Stats website monitoring and analysis software, v. 2.0. This manual covers most of the areas of Sales-n-Stats installation and use and is applicable for Sales-n-Stats Live edition. It is not intended for use with Sales-n-Stats versions prior 2.0 due to the many functional differences between Sales-n-Stats 2.0 and all the previous versions.

Sales-n-Stats Reference Manual

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Welcome to Sales-n-Stats 2.0.

Sales-n-Stats is professional website monitoring and analysis software designed to add a new dimension to the way your electronic business works. Sales-n-Stats visualizes the WWW part of your electronic business, converting it from a virtual website substance into a business unit that really works. With Sales-n-Stats the seemingly chaotic activity of your site visitors becomes something that you can see, measure, analyze and therefore control.
After installing Sales-n-Stats at your website you will have all the necessary functionality for supervising its visitors in real time, collecting and managing various information about the visitors, tracking the visitors' interaction with the site, providing live help and guidance to the visitors, as well as performing comprehensive analysis of any collected data. Sales-n-Stats gives you an opportunity not only to watch events occurring on your site, but to participate in the process by proactively interacting with your customers and thus making the desired events occur.

1. Introduction

This section gives you an idea about how Sales-n-Stats works and in what ways it can be helpful for you.

- See [Understanding Sales-n-Stats](#) [3] for details about basic features and capabilities.

- Read [Sales-n-Stats technology](#) [8] to find out about system architecture, components and technologies used in Sales-n-Stats.

- Check out [Basic principles of Sales-n-Stats](#) [16] to learn about how the software works, what it does and what kind of data it collects.

- Study [Use cases](#) [11] for an outline of the everyday tasks that can be accomplished with the help of Sales-n-Stats.

1.1 Understanding Sales-n-Stats

How it works

Sales-n-Stats is designed to work 24/7 performing a wide variety of tasks. The system features online monitoring, communication, data collection, reporting and automatic reactions.

Online monitoring

Online monitoring allows you to supervise the visitors on your website and to control their actions in real time. For the purposes of monitoring, your website is logically divided into several distinct areas (zones). Sales-n-Stats Operator Terminal provides a visual presentation of your website divided into zones with all the visitors browsing the different site zones at the moment. The visitors are presented there by 'visitor badges' - virtual identification cards providing brief summary of personal data and some essential information about their behavior on the site during the current visit in graphical form. The visual presentation of each visitor in the Operator Terminal allows you to estimate the overall number of visitors on the site and in each particular site zone, as well as to find out what each of the visitors is doing.

When the site is overcrowded, to reduce the number of visitor badges displayed on the site monitor and focus on a particular visitor group use special filters that sort the visitors in such a way that only the visitors who meet certain requirements get displayed (for example, existing customers, visitors with product items in their shopping cart or visitors who visit the website for the 1st time). You can use some predefined filters shipped with Sales-n-Stats or create your own.

Communication tools

Communication tools enable you to organize both online and offline communication with the site visitors. Any visitor in need of assistance can initiate communication with a Sales-n-Stats operator. Communication is established by means of online text chat or Voice over IP technology. A text chat or a voice call can be started by the visitor by clicking a special button located on the website he is browsing (such a button is built into any site monitored by Sales-n-Stats). When live support is unavailable, the visitor can still request help by leaving an "offline" message (a message that the operator receives when he goes online). Sales-n-Stats queues the incoming help requests from your visitors to ensure that each visitor gets a timely response.

You can initiate communication with any site visitor by yourself. If in the process of supervising your visitors' activity you notice that any of them is experiencing difficulties or might need a consultation, you can contact him personally from the Operator Terminal by starting an online chat. To contact the visitors who are offline send a message to their email addresses.

Sales-n-Stats communication tools facilitate employment of outside resources in the process of

communication. For example, 'Push' functionality allows you to easily send a file, an image or URL to a visitor during a chat session. 'Canned' messages functionality simplifies your interaction with the visitors allowing you to keep some predefined leading questions and frequently used phrases on your system and insert them into your messages to shorten the response time.

Visitor's Profile

For each site visitor the system creates a Visitor's Profile – a place that stores personal data associated with this visitor, the history of the visitor's interaction with the site (the actions performed by the visitor during each of his visits to the site) and (if applicable) the history of the visitor's communication with the customer service/ support staff.

The personal data entered by the system into a Visitor's Profile is collected from various forms that the user completes on your website (name, address, etc) and from the service data received by Sales-n-Stats in connection with the user's presence on the site (user's IP address, browser type, referrer URL, etc).

Actions

An 'action' is a fragment of the visitor's interaction with the site which may consist of one or more steps but is recognized by the system as a logically finished act. Actions are singled out on the basis of what steps or step sequences taken by a visitor are relevant for your business. For example, typical actions for an e-commerce site may be a visitor's registration on the site, adding a product to the shopping cart, checkout, etc. When a visitor performs certain actions and provides personal data, it is saved to his Visitor Profile. One of the greatest advantages of Sales-n-Stats is that it can be "taught" to recognize any actions which you think are relevant to your business.

All the actions the visitor performs on your site are also stored in the system. View his Visitor Profile to find out what actions were performed during each of the user's visits to the site. Profile also stores the complete history of communication of the visitor with Sales-n-Stats operators. To find any messages sent to or received from a visitor or view the transcript of any chat in which the visitor has taken part, open the 'Messages' section of his Visitor Profile.

A Sales-n-Stats operator can use the information contained in a Visitor's profile to analyze the visitor's previous experience interacting with the site and to provide personalized services to this visitor based on what he might be interested in.

Reports

Reports produced by the system allow you to receive different kinds of statistics about your website and to assess the efficiency of business methods used on this site.

The system provides a toolset that allows you to create various types of reports using the information gathered by Sales-n-Stats about the visitors and their actions on your site. According to your needs, receive web statistics, reports by actions, visitors reports, e-commerce reports, marketing reports, etc, based on various parameters.

The system provides a number of preconfigured reports for e-commerce sites. However, you can create an unlimited number of your own reports that meet the needs of your business. You have total control over the look of the reports you create: the layout of any report, as well as the font and color of the text can be adjusted using the built-in report constructor. If the resources of the report constructor do not meet the requirements of your own complex report, you can edit macros that generate the report. Many reports can be presented graphically as bar charts or pie charts. All the reports are printable.

Automatic reactions

Automatic reactions are operations which Sales-n-Stats can be set up to perform under certain conditions in response to customers' actions. You can define what action needs to be performed and what conditions need to be met for a certain reaction to take place.

The possible reactions that can be performed by Sales-n-Stats include displaying a message or a web link to the visitor who performed a certain action, making an HTTP request (GET or POST methods) to an external web application, executing an external application on the visitor's local machine, executing a macro, displaying an alert message to the operator and posting a message to the personal profile of the visitor who performed an action (without sending it to the visitor), modifying a Visitor's Profile field. For example, when a visitor places an order, Sales-n-Stats can display a thank-you message to him.

Functional roles in the system.

The major functional roles in Sales-n-Stats are administrator, operator and visitor.

Note: In **Live version** of Sales-n-Stats administrator and operator have exactly the same privileges in respect of access to the system resources, so these two roles are typically performed by the same person.

Sales-n-Stats administrator / operator

The person in the role of Sales-n-Stats administrator/operator is responsible for two major types of tasks:

- supporting the operation of Sales-n-Stats web control and communication center, and

- providing customer service to the visitors of the site monitored by Sales-n-Stats.

The administrative part of the job presupposes doing what is needed to get Sales-n-Stats up and running: the

administrator installs Sales-n-Stats and adjusts it to work with a specific website or a group of websites (defines site zones for better monitoring, adjusts general settings, sets up possible actions and reactions, etc).

The operator's functions depend on the aims and policy of your company and may include supervising the visitors of a website/group of websites, providing guidance to the visitors experiencing difficulties (site navigation problems, storefront errors), advising, consulting, upselling and any other activities involving person-to-person communication. Communication may be realized via text chats, voice calls or offline messages. The operator has the ability to answer assistance requests from the site visitors, as well as to contact specific site visitors proactively to offer assistance or special services.

Website visitor

The functioning of Sales-n-Stats is for the most part transparent to the site visitor as site monitoring, collection of data and creation of reports do not interfere with the process of the visitor's interaction with the site. While on the site, the visitor is occupied with browsing the site content, filling in the site forms, placing orders and doing whatever the site is meant for. In practice, the visitor may not even know that he is being supervised. Probably the only case in which the site visitor employs Sales-n-Stats tools is when he initiates online communication with a customer service/support staff representative (Sales-n-Stats operator) or leaves an offline message. The visitor can also be affected by reactions automatically performed by the system in response to some of his actions (for example, the visitor can get a message as a result of some action).

Sales-n-Stats: Live and Enterprise editions

Sales-n-Stats web control and communication center comes in two versions: **Live edition** and **Enterprise edition**. Preference for one version over the other is determined by the type of business that you are going to use Sales-n-Stats for.

Live edition meets the needs of small and medium-sized businesses. It is a single user version that allows one person to have full control over the system and best suits the companies where a wide variety of tasks is handled by the same person (for example, in situations where a self-employed business owner needs to be informed about all the aspects of his online business and himself defines the content and structure of the website, ensures personal contact with the visitors, analyzes the processes that take place on the site and their effect on the results of his business activities). **Live edition** of Sales-n-Stats provides exceptional performance and ensures efficient data exchange between the operator and the website in the process of collecting detailed information about any kind of activity on the website and providing it to the operator in real time. The same interface allows the operator not only to view and analyze the collected data, but to communicate with any of the visitors in person.

Enterprise edition is designed for larger companies and enterprise corporations in which several staff

members need to have simultaneous access to the information gathered by Sales-n-Stats and to be able to communicate with the website visitors at the same time. **Enterprise edition** thus represents a multi-user version of Sales-n-Stats that enables several specialists to simultaneously access centrally stored data over a network and to communicate not only with the website visitors, but with each other as well. The collaboration environment provided by **Enterprise edition** increases the overall productivity of your online business allowing specialists from different fields to use the same system at the same time for their diverse purposes. Multiple operator terminals enable support staff to provide assistance to a larger number of visitors and to divide responsibilities regarding the functioning of the WWW section of the business according to the sphere of competence of each specialist involved in the process.

1.2 Sales-n-Stats technology

System architecture and components

From the technological point of view, Sales-n-Stats system consists of Java® application that runs on your local computer and PHP script that runs on your web server. We selected Java and PHP as key technologies for this product to ensure truly cross-platform compatibility: Java applications can be run on almost any desktop system and PHP is installed on every web hosting. Sales-n-Stats is not a server side script but software that runs on your computer with full-fledged graphical user interface.

From the functional point of view there are three main components in the system of Sales-n-Stats: **Data Collector**, **Data Center** and **Operator Terminal**.
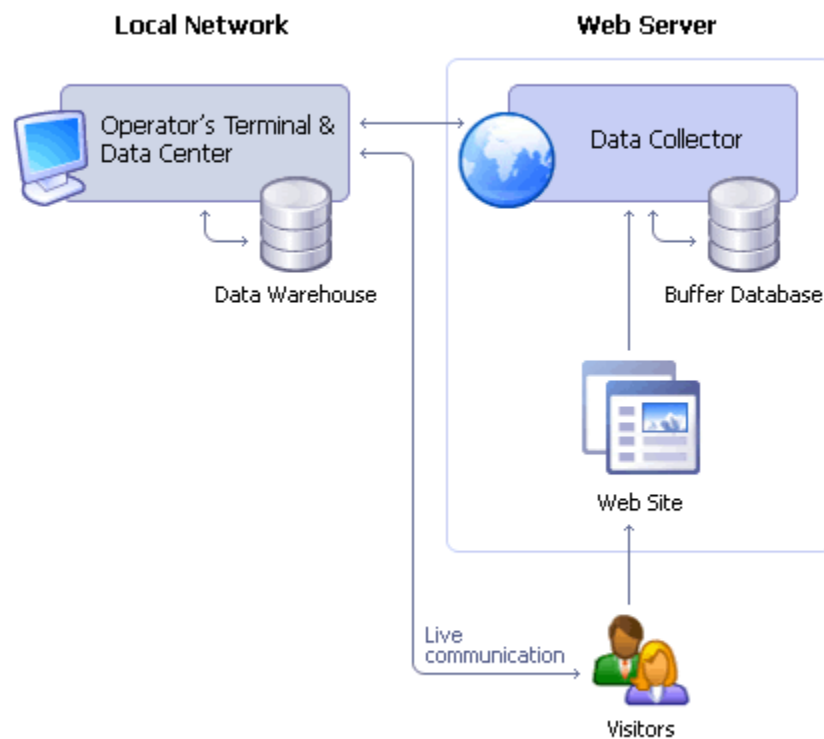
Sales-n-Stats Live edition structure.

Data Collector is a compact PHP script installed at the hosting where your website is located. Through a JavaScript tracker built into your site it gathers different kinds of visitors' data (notes, emails, URLs, etc) and transfers it to Data Center. Data Collector has its own database which enables it to accumulate information about the visitors' actions on the site if Data Center is down for some time. That means you do not have to

keep Data Center on all the time. The data is accumulated in Data Collector database even if the Internet connection is broken. All information accumulated in Data Collector goes to Data Center as soon as it becomes available.

Data Center is a centralized warehouse for storing and processing data received from Data Collector. Data Center is the heart of the Sales-n-Stats system, the most complicated data processing routines are done here. It converts raw data coming form Data Collector into highly structured information like visits and actions so it could be visualized on Site Monitor or used in reports. Data Center also manages all communication streams and takes care of receiving and queuing calls. Industry standard SQL databases are used as a data warehouse for storing visitors' data. Currently MySQL and Hypersonic SQL server are supported. In **Enterprise version** Data Center is available as a standalone application. In **Live edition** Data Center is combined with Operator Terminal.
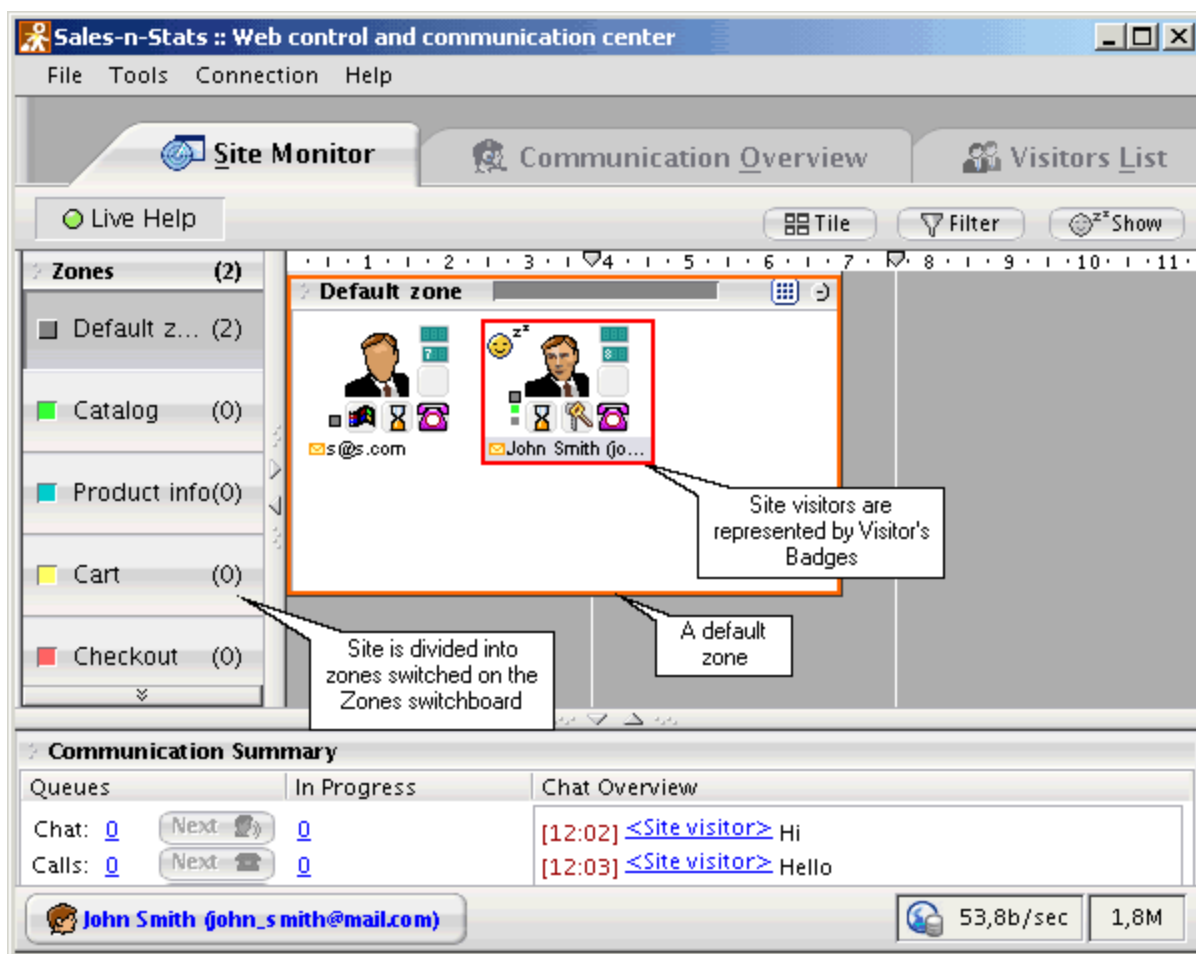
Operator Terminal

Operator Terminal is an integrated workplace for an operator (manager, web master, analyst, or administrator)

which is implemented as a Java application and is free from the typical weaknesses of a web interface. Operator's Terminal features a graphical representation of the website and provides a set of tools for analyzing the website activity and efficient communication with the visitors. **Live edition** of Sales-n-Stats is a single user version in which only one user with administrator/operator privileges can use the Operator's Terminal at any moment in time. **Enterprise edition** features multiple Operator Terminals connected to Data Center through the network using client-server technology. Separate Operator's Terminals with access to the resources of one common Data Center provide efficient collaboration environment in which several operators can work simultaneously communicating with each other and redistributing tasks according to the sphere of competence of each operator.

Technologies involved

- Java (J2SE™) is used as a platform for Data Center and the Operator's Terminal.

- Data is stored and processed with an SQL database.

- Client-side ActiveX/Java Applet organizes the process of communication with the visitors on the site.

- PHP ensures effective integration with a website.

1.3 Use cases

This section does not describe any particular Sales-n-Stats features, but outlines some of the everyday tasks that can be accomplished with the help of this software.

Adding a personal touch to your online business

Building customer relationships

Sales-n-Stats enables you to identify the visitors coming to your site as being either new or already existing customers and to choose the appropriate style of communication accordingly. Knowing who your customers are allows you to provide personalized services to each of them. For example, the fact that a visitor is your existing customer is clearly indicated on his **Visitor's badge**. The badge shows the visitor's name (it is known to the system as the visitor himself provided it along with his other personal information during the previous purchase). It means you can at least welcome this visitor by the name - which he does not even expect in the faceless, anonymous, highly automated Internet environment. If you then take a minute to analyze the Visitor's profile, you will find more useful data stored there: the history of the customer's purchases, visits chronology, communication transcripts, contact information etc. The information obtained from the Visitor's profile can be a good basis for consistent communication: you find out the area of interests of this person, his personal preferences and communication style. Pretty soon you get to know as much about this customer as if he were living around the corner and were regularly dropping by to buy something or just to say Hello! Tactfully exercising personalized approach to your customers breeds customer satisfaction and loyalty to your business.

Finding out your visitors' actual needs

You can find out pretty much about your visitors' areas of interest even without asking them any questions. When a visitor comes to your website from a search engine (e.g. Google or Yahoo), Sales-n-Stats indicates that on his [Visitor's Badge](#) 82 and shows you the search phrase that brought the visitor to your site. Knowing what the visitor is looking for, you can contact him and help him make the right choice. For example, the visitor is searching for "golf clubs for beginners". Based on this search phrase you can assume that the customer is looking for an inexpensive set of golf clubs for leisure play and offer an appropriate product.

You may find it a good idea to set up Sales-n-Stats to monitor the search forms at you site. The results of site search can be used in the same manner.

Working out the right style of communication with your visitors

You must be aware that not all of the visitors browsing your site may be willing to talk with your staff. Some of them may be just not in the mood for talking, others may believe "those sales sharks are only trying to shove things down their throat to rip them off". So, try not to be importunate. When a sales manager imposes unwanted help, it is the shortest way to drive a prospective customer off the site. Sales-n-Stats helps you to deal with this problem by providing a way to find out the customers' disposition. The customers declining an invitation for chat are marked by a special sign indicating they do not want to be bothered again during this visit. If not sure whether to contact a visitor or not, you can refer to the history of previous communication with him to get a better idea of whether your help will be appreciated. Ability to provide tactful assistance may become a quality that could help your business to stand out in a crowded market.

Saving your customers' time

A visitor in need of a particular product or service often does not have the time to look for it among the other things on your site or does not have enough motivation to search through loads of information just to find an answer to a simple question. Sales-n-Stats live communication tools can be a solution for such a visitor. All he needs to do is to request assistance from a live consultant via the site's chat facilities. Using a text or a voice chat, the consultant can answer the visitor's request without making the visitor wait too long. Even if the desired product is not listed in the catalog, the consultant can often advise a similar product or a product that is even better than the one the visitor has originally requested. If despite the consultant's effort a substitute for the required product or service is not found, the customer is satisfied with the experience all the same – and probably next time he needs something your site will be one of his first considerations.

Letting the customers know you are on their side

Sales-n-Stats is a powerful means to facilitate upselling. Suppose, a visitor browses you store, puts a product into his shopping cart and heads to checkout. The system detects this action and notifies the sales manager online. The manager contacts the visitor via text or voice chat and offers his assistance. In the course of the discussion the manager can figure out what the product being purchased is going to be used for and what other products could complement the purchase. Normally, an efficient sales manager knows the produce sold at his store well enough to offer the customer some additional goods or accessories that can help to make the original product even more useful. This can turn out to be the real key to success for your store: when upselling is done, additional revenues are earned by the store and the visitor gets everything he needs to achieve his specific aims. Letting the customers know you are on their side cannot but promote future success of your store.

Providing focused support to customers placing big orders

If the system indicates there are some expensive products in a visitor's cart, the visitor is probably worth paying additional attention to as a potential source of a big order. Placing items into the cart does not necessarily mean the visitor is going to purchase them immediately, but it clearly indicates an interest in this particular item. It may be good practice to proactively contact this client and offer your assistance through live communication. The customer making a big purchase is likely to welcome additional attention from the sales crew, so both the sides will benefit from the negotiation. Even if the visitor is not ready for the purchase and abandons the cart with some products left in it, there is a good chance he returns to this site when ready to make the order. You have the ability to mark this visitor with a special sign (**Marker**) not to miss him when he returns to your site.

Customer services

Proactive Contact

Suppose your site works as an online catalog advertising the products and services provided by your company. Even if the site visitors do not have the ability to order online, you can still be helpful to them. Operator can monitor what pages a customer browses and how long he stays at each page to get an impression of what interests the visitor. When the visitor starts viewing detailed descriptions returning to the previously viewed pages, it's time to offer him live assistance. The probability of the visitor's becoming your happy customer is much higher with personalized contact. Of course, there are certain chances the visitor gets interested and contacts you on his own initiative. However, if you believe keeping your customers satisfied is the key to success, do not hesitate to lend a helping hand as soon as you notice it might be needed.

Responsive support

An existing customer has difficulties using a product he purchased from you. He comes to your site and clicks the **'Click for Live Help'** button. Operator-receptionist receives the incoming support request and gets basic information about the problem. If the problem is not trivial, the operator can transfer it to the corresponding department that is able to solve the problem. If the customer comes to your website during non-working hours or on a day off, he can leave a message for the technical support service and get an answer as soon as they are back in office.

Resolving support tickets

If the traffic on your site is too intensive for your operators to resolve all requests in real time, Sales-n-Stats offline communication tools can be used. Your customers can leave a message using a contact form at your

site. The message is placed in the message board and queued for processing. The operator does not need to search for the messages that came in lately: he just clicks the next message button and starts working on the customer's request. The reply is automatically mailed to the customer, and the message is marked as closed if necessary.

Enterprise edition of Sales-n-Stats allows you to organize the process of visitor-to-operator communication even better by providing some operators exclusively for online communication and some for processing offline messages.

Placing targeted ads more effectively

Analyzing the most popular site paths, you can get a better idea of how your visitors traverse through the website. You can take advantage of this knowledge, for example, by placing links to special offer discounts and other marketing information in the most conspicuous places to make sure this information is delivered to the potential customers.

Localizing and resolving usability issues

Improving the conversion rate, you can pay attention to the pages where visitors abandoned your site. There is quite a number of reasons why your visitors could do that, but you should make sure it is not because of some kind of deficiency in your site design functionality. For example, from a report you can infer that many customers place products into the shopping cart, but very few of them actually proceed to checkout leaving your site from the **'View Cart'** page. After taking a closer look at this page you discover that the **'Checkout'** button is located at the very bottom and many potential customers just could not find it instantly and thus left the site in frustration. Placing the button higher and making it clearly visible immediately reduces the number of visitors leaving the cart prematurely. Another example: a report indicates you visitors frequently abandon your site from the **'Register'** page. It may be so that there are too many required fields to fill in and the visitors get bored before they finish the registration process. After analyzing the problem, you can redesign the registration page and find out whether your inference was right.

Improving and promoting your website

Making your site more attractive to visitors

Use Sales-n-Stats to explore your site mechanisms and learn more about your visitors: origin, dynamics, source of traffic and, what is very important, how the visitors interact with your site - what actions they perform, what paths they follow. Sales-n-Stats reports can help you understand which of the site pages capture your visitors' attention. Keep in mind that the length of time people spend on a site is not necessarily a measure of

success – it can often be a measure of failure. If, analyzing data provided by Sales-n-Stats, you see that your site visitors wander in circles and exit the site without making any orders, it may be a sign that something is wrong with the site navigation system.

Do not force your visitors to navigate unnecessarily or to stay on your site longer than is required: restructure your website to simplify navigation. Check the frequently abandoned web pages for issues that may cause visitors to prematurely exit your site, like error messages generated by faulty program code or obvious typos. Keeping your site in order helps you attract more visitors and promote your products and services.

Finding out what search phrases really work for you

No one will probably argue that proper placement in search engines can bring anticipated traffic to your site. But what search phrases really work for you? You may rely on your intuition but solid facts are usually stronger arguments. Sales-n-Stats works on the visitor level so it is quite simple to track if a sale was generated by a search engine and what search query triggered that sale even if the actual sale was made some time later. Knowing the right phrases you can significantly save money by not paying for non-working adwords and invest into some really working ones. This information can also be very handy when selecting keywords for search engine placement.

Splitting customers base to target groups

Sales-n-Stats can help you to segment your customer base for conducting a promotional campaign or seasonal sale, or for doing a marketing research. With specialized reports bundled with the system you are able to split your customer base by the type of purchased products, total number or sum of orders, geographical location and time of purchase. The visitors who did not purchase anything can also be processed (for example, registered users, newsletter subscribers, visitors who filled in the contact form, etc). The resulting lists of visitors can be exported to text (CSV) files and then processed by third party software.

For example, you can send a discount coupon to all the customers who ordered products from your store for a sum of more than $250 during the last six months; inform all the customers who recently searched for golf clubs or added them to the wish list that you have a new arrival of golf clubs and accessories; invite all the local customers to visit your physical store for a free wine tasting or notify all the customers from your state that you are now offering free in-state delivery.

1.4 Basic principles of Sales-n-Stats

Personalization

Sales-n-Stats monitors the site with which it is integrated, analyzes the behavior of the site visitors and gathers various kinds of information about how the site visitors interact with the site. Analyzing the information collected by Sales-n-Stats can give you a good idea of what interests your site visitors. Knowing each of your clients on an individual basis allows you to deliver appropriate site content and services, tailored to the client's needs. And if a client is satisfied, he is likely to return to you site for more.

Real-time supervision

Sales-n-Stats allows you to find out what is happening on your site in real time. At any moment you can estimate the number of visitors browsing your site, the popularity of this or that site zone, the efficiency of your navigation system, etc. The system based on action registration informs you of any changes in your visitors' statuses or any situations which can be turned to your advantage as soon as your visitors perform actions that cause them. Receiving information "on the fly" allows you to always be in the know of things and, if necessary, to interfere with the visitors' activity by providing online assistance.

Selective collection of relevant data

Sales-n-Stats is capable of collecting almost any data which a site visitor might provide interacting with a website. However, it collects not all the data, but only what you find relevant. It is you who defines what information needs to be collected. Integrating your Sales-n-Stats with a website, you set up action patterns and profile fields defining what kind of data should be regarded as relevant and be stored in the system. A profile field is a subsection of a Visitor's Profile which stores visitor-related information of a specific kind (for example, the visitor's name, address, etc) and is rigidly associated with a specific action which a visitor can perform on the site (for example, login). Actual data is entered into profile fields solely as a result of the corresponding actions getting performed on the site. Thus, no information is collected by Sales-n-Stats unless you "ask" the system to collect it.

Comprehensive presentation of data

Sales-n-Stats provides a comprehensive presentation of any data it collects. The essential personal information of any visitor browsing the site may be found out from the graphical badge by which he is represented in Site Monitor. You can adjust the badge settings so that general information is reflected on the badge in symbolic form and more specific information is displayed as text. According to your preferences, you may keep the badge simple or make it detailed. All the information about a visitor's interaction with the site can be found in his personal profile where it is permanently stored in an organized way. The operator's terminal provides a

convenient access to chats and messages, as well as the list of all the site visitors. The reports system is extremely flexible and can be adjusted to produce a wide range of reports for data analysis.

Human interaction

In view of the latest tendencies in e-business and e-commerce, the conception of the Internet as merely a functional interface for delivering information and taking orders is rapidly changing. In the impersonal environment of the Web people want to stay connected to other human beings. The need for human touch in online businesses seems only natural, as only a real person can effectively guide the customer, respond to special requests, solve problems and assist in purchase decisions. Sales-n-Stats meets this need, bringing the power of human interaction to your online business. Knowing there are real people behind technology allows your customers to feel more comfortable and confident on your site.

Variety of communication methods

Sales-n-Stats provides several ways in which a visitor and a Sales-n-Stats operator can communicate. The person who begins the communication can choose a most suitable method. For example, such methods as text chat or Voice over IP are available for online consulting. When either an operator or a visitor cannot be accessed online, the other party has the ability to leave an offline message.

Respect for the user's privacy

Sales-n-Stats respects the privacy of your clients and cannot be used to collect any data which a site visitor might be unwilling to provide. No software is installed on a client's computer, which means you cannot capture any data the client uses on his own computer or in the process of interaction with any other websites. Sales-n-Stats functions solely on the site with which it is integrated and collects only the information which the visitor of the site voluntarily provides to you by navigating about the site and completing various forms. In a word, Sales-n-Stats does not capture passwords or any other private data, it only helps you organize and analyze the data you receive from your own website more effectively. Data is stored in your private network and is not exposed to third-party web-statistics services.

2. Installation

Before you install Sales-n-Stats read the 'System Requirements' [19] chapter carefully and make sure all necessary requirements are fulfilled. Then follow the step-by-step instructions in this chapter to install the software.

- If you have one of such web applications as LiteCommerce, X-Cart, osCommerce and other software packages supported out-of-the-box the integration process is much easier; all you need to do is install a special integration plug-in. Visit http://www.sales-n-stats.com for a complete list of the supported products.

- For instructions on how to install Sales-n-Stats refer to Installing Sales-n-Stats using the installation wizard [21] section.

- If for some reason installation wizard could not establish FTP connection or transfer Data Collector files, you have to Install Data Collector manually [29].

- For more details about integrating Sales-n-Stats site tracker your website refer to the 'Integrating Sales-n-Stats into your website' [46] chapter.

- For help on how to enable your visitors to initiate visitor-to-operator chat, read 'Adding a 'Click For Live Help' button' [48] chapter.

- To learn how to create the integration code refer to the 'HTML Code Generator' [43] chapter.

2.1 System requirements

This section lists what hardware and software is necessary for optimal performance of Sales-n-Stats. Sales-n-Stats is developed for Java 2 platform (J2SE™) and uses either built-in or remote MySQL database for data storage.

As the Sales-n-Stats system consists of several components which may be located on different machines, we divided the system requirements into several groups corresponding to the specific components of Sales-n-Stats. Requirements for Sales-n-Stats **Live edition** include requirements for the hosting where Data Collector is installed and requirements for the machine where Data Center and Operator Terminal are located.

Data Collector hosting requirements

Make sure the web server your hosting company will use for the Data Collector has support for:

1. PHP version 4.1 or later till PHP version 5 (no extensions are required). The **'Safe mode'** must be disabled in PHP configuration. For more info visit the PHP site at http://www.php.net

2. MySQL database server.

3. If the monitored website has a https version make sure that the domain is the same for both http and https. For example **http://example.com** and **https://example.com**.

If these requirements are met, ask your hosting administrator to create a MySQL database (you will need it for the Data Collector) and to provide you with the following information:

1. MySQL server name;

2. database name;

3. MySQL username and password. CREATE TABLE and ALTER TABLE permissions should be granted to the MySQL user as well as the full data access.

Data Center and Operator Terminal requirements

Make sure your workstation meets the following requirements:

1. It has at least 512 Mb RAM/1.5 GHz CPU, at least 200 Mb (300 Mb recommended) of free space on HDD.

2. On Unix and MacOS, check that Java Runtime Environment (JRE) version 1.5.0 (J2SE 5.0, more information available at http://java.sun.com/j2se/5.0) is installed. It is much easier to use bundled JRE but

if your Sales-n-Stats distribution does not have bundled JRE (which is the case with Unix and MacOS distributions) and you do not have it on your machine, download JRE from the Web: http://java.sun.com/j2se/1.5.0/download.html (this page gives links for downloading J2SE™ JRE for various platforms).

3. If you intend to use VoIP, your computer needs to have a sound card, a microphone and speakers and to be connected to the Internet directly (without HTTP proxy).

4. Sales-n-Stats Data Center needs a database for its work and can be set up to use either the embedded Sales-n-Stats database or a MySQL database. Using MySQL has certain advantages over the embedded database, as MySQL demonstrates better performance and stores your data more safely. To use a MySQL database instead of the embedded one, you need to have MySQL on your local machine or in the local network. Data Center supports MySQL version 3.23 or later. Download MySQL for free from http://www.mysql.com.

2.2 Installing Sales-n-Stats using the installation wizard

To install Sales-n-Stats using the installation wizard, follow the next steps:

1. Check whether your web server and your local computer meet the <system requirements>. Ensure that you have FTP-access to your web server for uploading web pages and PHP scripts.

2. On the server where you host your web site create a MySQL database. Refer to [MySQL Reference Manual](#) to find out how to create a MySQL database.

3. Log into the <private members area> and open File Area section. Click on Sales-n-Stats item under 'Product files' heading. You will see three distribution files named like:

- Sales-n-Stats_windows_x_x_build_yyy.exe

- Sales-n-Stats_unix_x_x_build_yyy.sh

- Sales-n-Stats_macos_x_x_build_yyy.dmg

where "x_x" is the version number and "build_yyy" is the build number (for example if you need to install Sales-n-Stats 1.3 build 153, the necessary file will end in "1_3_build_153")

Download one of the distribution files depending on what OS is installed on your local computer and start Sales-n-Stats Installation Wizard by executing the downloaded file.

4. Specify the path to the directory on your local computer where Sales-n-Stats will be installed, enter the shortcut name and continue installation.

Step 1: Defining Data Collector location

If Data Collector is already installed on the web server (for example, you are upgrading from a previous version of Sales-n-Stats Enterprise Edition), select "Use previously installed Data Collector" option, specify the previous Data Collector URL and the Data Collector passphrase and proceed directly to 'Step 4. Activating the Software'.
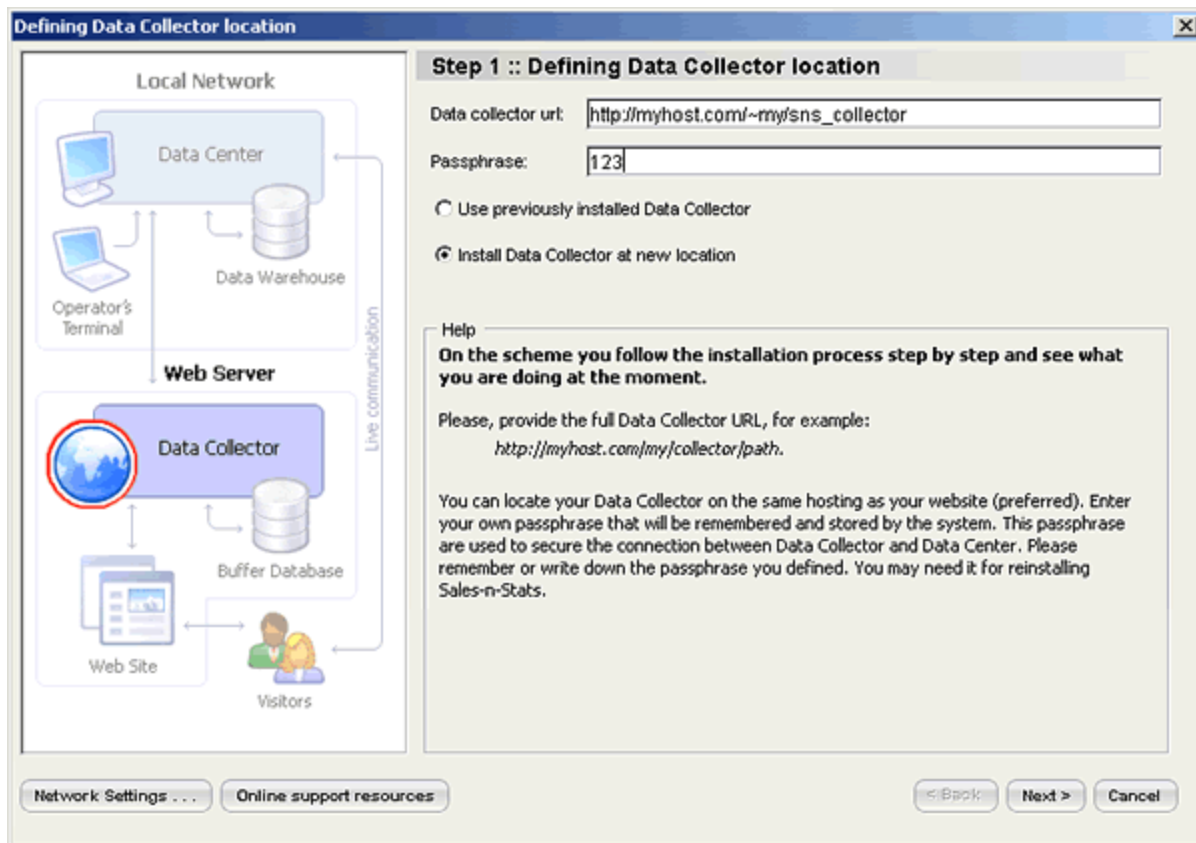
Step 1. Defining Data Collector location

If you have not installed Data Collector yet, select "Install Data Collector at new location" option and specify the passphrase and the URL where Data Collector will be installed (it should correspond with the path on the web server where Data Collector files will be uploaded). For example, if your web site URL is "http://www.mysite.com/", Data Collector URL could be "http://www.mysite.com/sns_collector/". Click **Next**.

Step 2: Installing Data Collector to your host

Enter FTP settings of the web server where Data Collector files should be uploaded:

1. Specify your FTP Hostname, for example www.myhost.com.

2. Enter the installation path (relative to the ftp root directory) that corresponds with Data Collector URL you have entered at the previous step. For example, if the Data Collector URL is "http://myhost.com/sns_collector" and the path (relative to the ftp root directory) to the web directory is "public_html", the installation path most likely will be "public_html/sns_collector". The web directory usually has one of the following names: public_html, httpdocs, htdocs, html, mainwebsite_html or wwwroot. You can obtain the exact web directory name from your hosting provider.

Note: Remember that the installation path must correspond with Data Collector URL, otherwise Data Collector will not be installed correctly.

3. Enter the login and password for your FTP account.

Step 2. Installing Data Collector to your host

Note: The hostname and installation path, login and password will probably be given to you by your hosting provider.

Click **Next** and the installation wizard will upload Data Collector files to your web server using the FTP details which you specified.

If you have installed Data Collector before and try to use the same folder for installing a new Data Collector, a system message appears.
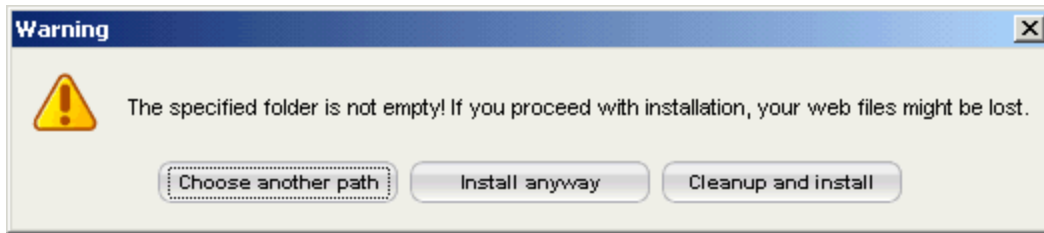
A warning message

Select one of the options and continue the installation.

Step 3: Installing Data Collector buffer database

Specify the host name of the MySQL server set up on your web server, the name of the MySQL database which you created on the web server, the MySQL login and the MySQL password and click **Next**.
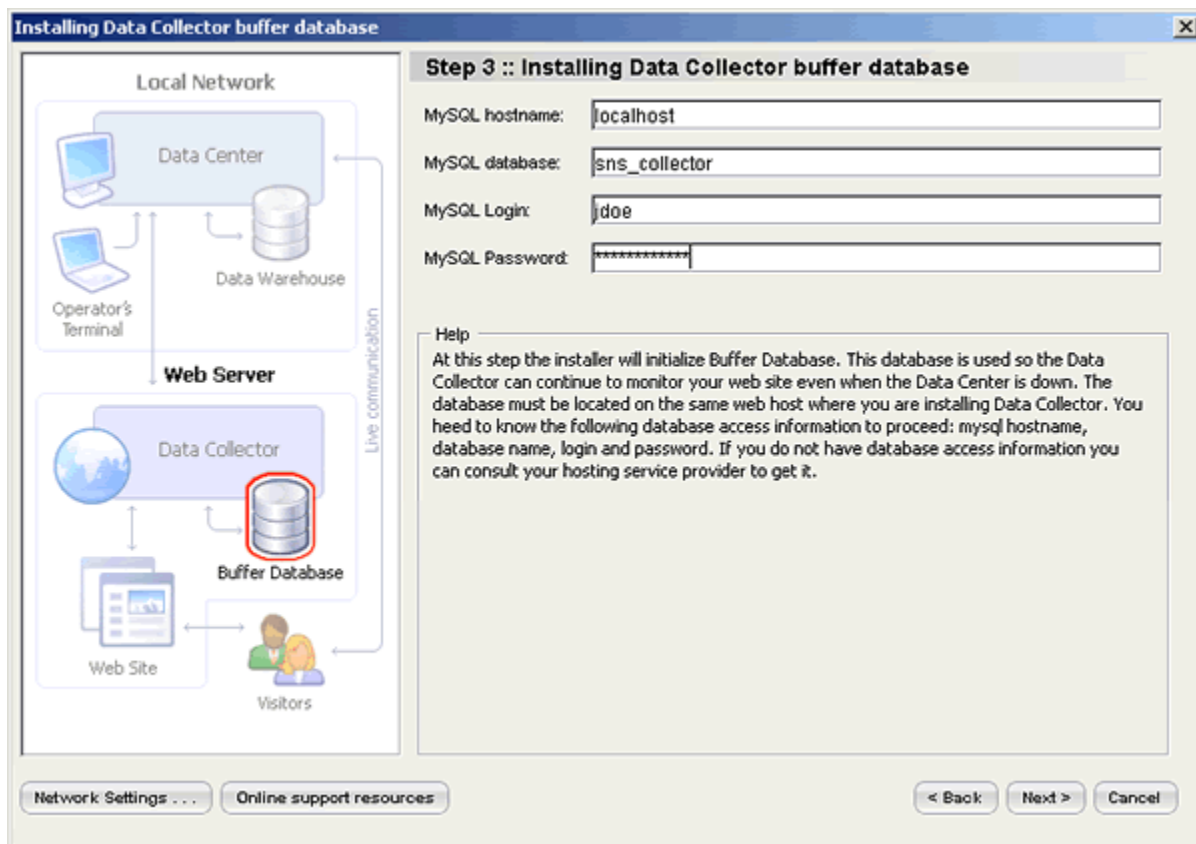
Step 3. Installing Data Collector buffer database

Note: Usually the MySQL host name is **localhost** but make sure you get the MySQL host name, the database name and the password from your hosting company.

At Step 3 while installing Data Collector buffer database you might receive an error message that the collector

URL does not correspond to the FTP installation directory. This usually happens when FTP path and Data Collector URL that you specified are actually pointing to different directories on your web server. Please make sure that FTP path is correct and pointing to the Data Collector directory.

Step 4: Activating the Software

Either specify the license key that you received after purchasing Sales-n-Stats (a sequence of 16 capital letters grouped by four, for example, CCIR-GFTY-KIOL-DERW) or upload a valid certificate file. You can get a certificate file from the 'My Licenses' section of the HelpDesk area at https://secure.qualiteam.biz.
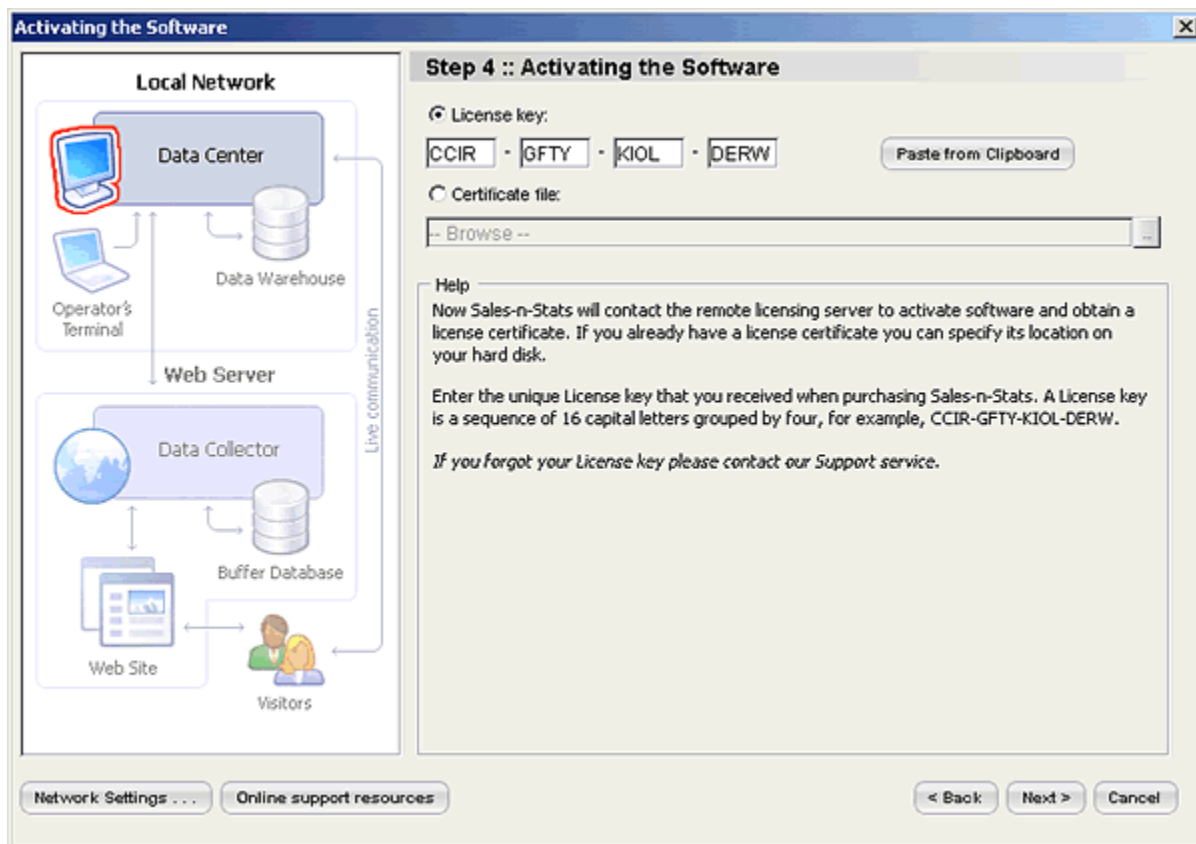
Step 4. Activating the Software

Note: if you forgot your License key please contact our Support service.

HTTP Proxy

If your computer is connected to Internet through a proxy server, click **Network Settings** button below the image describing Sales-n-Stats architecture and specify the correct proxy settings.
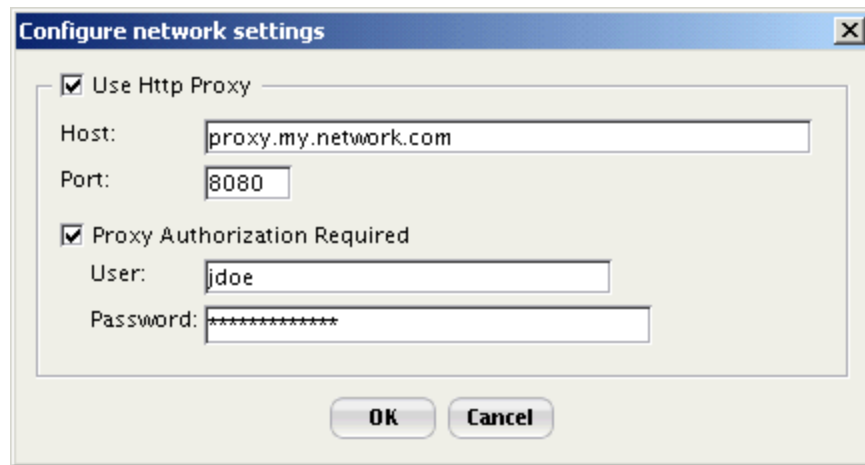
Configuring network settings.

Note: if your computer is connected to Internet through a local network, most likely there is a proxy server. In this case contact your system administrator to get the correct proxy settings.

Step 5: Set up mail & server parameters

Optionally specify the sender and recipient email addresses (will be used by Sales-n-Stats for sending email messages and notifications) and the settings of the email server that will handle these emails.

Step 5. Set up mail and server parameters

Click **Next** to continue the installation. If you are reinstalling Data Collector to the previously used folder, at this step you will get a system message offering you the following options:

- use existing data

- clear database

- cancel
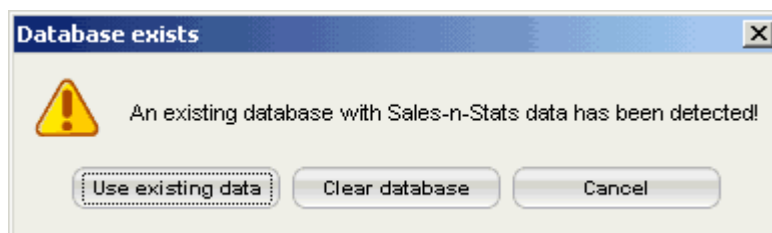
A system message offering you to use an existing database

Step 6. Finish installation

Read what to do next in the 'Help' section and click **Done**. The 'Quick Start' sample site opens in a browser for you to see how Sales-n-Stats works. 'Completing the Sales-n-Stats Setup Wizard' dialog opens. Click **Finish** to complete the installation.

2.3 Installing Data Collector manually

1. To obtain Data Collector files run Sales-n-Stats installation wizard and proceed to the Step 1. Defining Data Collector location.

2. Without shutting down installation wizard open the directory where you have chosen to install Sales-n-Stats application (for Windows the default directory is **C:\Program Files\Sales-n-Stats**). Inside Sales-n-Stats directory find the directory called **var**. Inside **var** directory find .zip archive containing Data Collector files. If you are using free version then the file is called **free_collector.zip**, in commercial version the file is called **sns.zip**

3. Upload the contents of this .zip file to your server, put it to the directory where you want to locate Data Collector, for example, **http://myhost.com/my/collector/path**.

Note: either unzip this file locally and then upload all the files to your web server or upload zip file to your web server and then unzip it. Some hosting services allow uploading and unpacking .zip archives which should be much faster then uploading entire directory.

4. Open Sales-n-Stats Installation Wizard at the URL page, for example, **http://myhost.com/my/collector/ path/install.php** in your web browser. Then follow the Installation Wizard instructions.

5. Do not forget to configure file access permissions (Unix only!) by using the following commands: **chmod 777 conf**, **chmod 777 conf/***

6. Setup will check PHP configuration on your server.
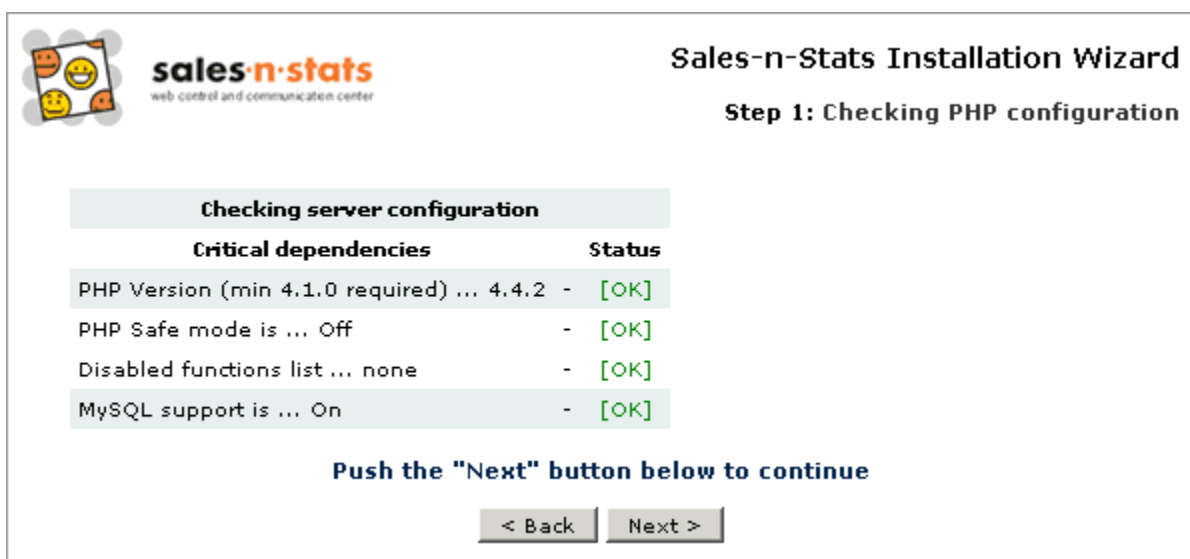
Checking PHP configuration

If everything is [OK] click **Next**. If something [FAILED] contact your server administrator and inform him about the problem.

7. Enter your web server details and MySQL database information.

Preparing to install Sales-n-Stats database

8. Verify if all the provided information is correct. Click **Next** to continue or click **Back** to change the information.

Preparing to install Sales-n-Stats database

9. Wait till the installation script creates the necessary folders, database tables and inserts data into the tables. The time necessary for this step depends on the speed of your server. When this installation step is finished and everything is [OK], click **Next** to continue.

If something is marked as [FAILED] contact your server administrator about the problem.

10. You will be notified if the installation was successful.

Installation complete

Insert the URL from the 'Site Tracker' field into each page of your site you want to be tracked. For the detailed information refer to the 'Integrating Sales-n-Stats into your website'.

Enter the URL from the 'Data Collector URL' field into the 'Data Collector URL' field (Step 1. Defining Data Collector location) while updating license and then select 'Use previously installed Data Collector' option.

To get an idea of how the system works see **Quick Start**. Add "quick_start" to the URL from the 'Data Collector URL' field, for example, **http://myhost/my/sns_collector/quick_start** and enter this URL into your browser address line.

3. Integration

Before you start receiving information about a site through Sales-n-Stats, you have to integrate your Sales-n-Stats with that site. The materials of this chapter provide guidance on the process of integration, which depending on the extent of modifications involved may take from a few minutes to a few hours.

Integration of Sales-n-Stats with any site consists of the following steps:

1. Integrating tracker JavaScript code into the website.

2. Adding **'Click for Live Help'** buttons to the website.

3. Customizing the look and feel of Sales-n-Stats **'Live Communication'** dialogs.

4. Implementing external actions.

Note: Some coding skills are required to perform the task of implementing external actions. If for some reasons using external actions is not possible, you have to set up action variants via Sales-n-Stats Action setup. Refer to Setting up action patterns 159 for more info.

Sales-n-Stats can be integrated with such e-commerce applications as X-Cart, LiteCommerce and osCommerce by means of an out-of-the-box integration module. The module performs most of the integration tasks automatically: all you need to do is install the module and adjust the module settings on the application interface.

3.1 Using Sales-n-Stats with LiteCommerce software

If you are going to use Sales-n-Stats for monitoring a **LiteCommerce**-based store, download from the section 'Software distributives' of Sales-n-Stats 'File area' the archive of the integration package litecommerce-x.y-connector.zip, where x and y are your **LiteCommerce** version numbers.

Note: Integration with Sales-n-Stats using the integration package is available for LiteCommerce beginning with the version of 2.1.
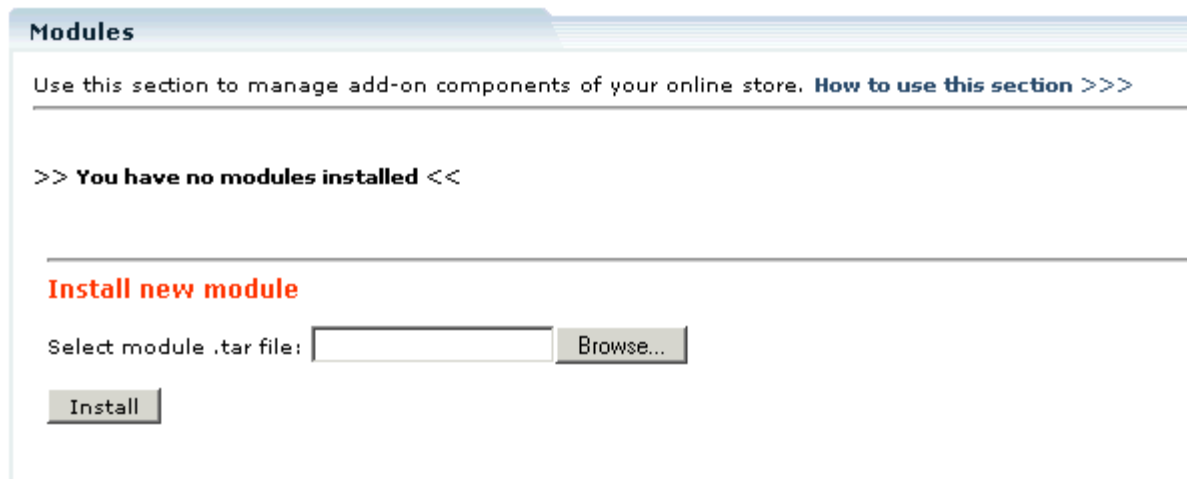
The integration package includes three files:

- **SnsIntegration_add-on-x.y.tar** - integration module SnsIntegration;

- **litecommerce-x.y.sns** - LiteCommerce-specific settings for import into Sales-n-Stats;

- **README**

After downloading the archive from the 'File area', uncompress it and follow the instructions in the README file.

Install and configure the integration module

Log in to **LiteCommerce** admin zone. Open the 'Modules' section.

LiteCommerce admin zone: Modules section.

1. Click **Browse** in the 'Install new module' section to locate the integration module file SnsIntegration_add-on-

x.y.tar on your machine. Select the file.

2. Click **Install**. The process of module installation begins.

The message 'Module SnsIntegration has been installed' signifies successful completion of the installation process.

Note: If, while running the installation, you get any messages marked red, it means some errors were encountered and the installation has not been completed properly. Resolve the issues interrupting the installation process and run the installation wizard from the beginning.

3. Use the link **Click here to return to admin zone** to return to the 'Modules' section.

SnsIntegration module has been added to the list of installed modules.

Now you need to configure the module.

4. Click on the name of the integration module.

SnsIntegration module settings page.

5. Specify the location of your Sales-n-Stats Data Collector by entering its HTTP URL and, if applicable, HTTPS URL

Note: If the monitored website has a https version make sure that the domain is the same for both http and https. For example your data collector URLs might be **http://example.com/sns_collector** and **https:// example.com/sns_collector**. If the domain names are different, the same visitor will be identified as two different visitors if he moves from a http to a https page and vice versa.

6. Specify the platform of your Sales-n-Stats collector (php or ASP.Net).

Note: For the current version of Sales-n-Stats only a php-based collector is available, so choose php.

7. To use the operator button ('Click for Live Help') on your **LiteCommerce** site, select the check box. By leaving the check box empty you disable the button, which means your visitors will not be able to initiate visitor-to-operator communication.

8. Enter the same passphrase you used for Data Collector installation.

9. Click **Submit**.

Import LiteCommerce settings

After installing and configuring the integration module you need to import LiteCommerce-specific settings into your Sales-n-Stats. Do the following:

1. Click **File** in the Web control and communication center Main Menu, select **Import settings**.

2. Locate the file **litecommerce-x.y.sns.** Click **Open**. 'Import system settings dialog' is displayed.

3. Select the necessary check boxes in the 'Import system settings' dialog. Click **OK**. The zones used for Quick start demonstration are replaced in the Site Monitor by the zone set typical for LiteCommerce (Default zone, Catalog, Product info, Cart, Checkout, Help&Legal).

Do not forget to select the appropriate template set for Sales-n-Stats elements that appear on your LiteCommerce-based site (**Main Menu -> Tools -> System settings -> Data Collector -> Web templates**).

3.2 Using Sales-n-Stats with X-Cart software

Beginning from **X-Cart** version 4.0.18 integration is not required, you only need to adjust the settings of the corresponding module and import the .sns file containing Sales-n-Stats settings.

If you are going to use Sales-n-Stats for monitoring a store based on **X-Cart** of an earlier version, the integration should be done by means of a special integration module Sales-n-Stats connector. Download from the section 'Software distributives' of Sales-n-Stats 'File area' the archive of the integration package xcart-x.y.z-connector.zip, where x, y, z are your X-Cart version numbers.

Note: Sales-n-Stats integration with **X-Cart** software by means of the integration package is fully functional for X-Cart versions 4.0.14 and later. Use of the package with earlier versions is possible with a special patch furnished with the module distributive. See the integration instructions for earlier versions below in the section 'Integration with X-Cart versions prior 4.0.14'.

The process of integration by means of the integration package is the same for **X-Cart Gold** and **X-Cart Pro**.

The integration package includes three files:

- **xsns-x.y.z.tgz** - integration module Sales-n-Stats connector;

- **xcart-x.y.z.sns** - X-Cart-specific settings for import into Sales-n-Stats;

- **INSTALL.X-SNS**

After downloading the archive from the 'File area', uncompress it and follow the instructions in the file INSTALL. X-SNS.

Install and configure the integration module

Uncompress the archive xsns-x.y.z.tgz and copy the resulting files to the directory where your X-Cart is installed.

1. Run in the browser the installation script: **http://www.yourhost.com/xcart_dir/install-xsns.php** X-SnS connector installation wizard is launched.

2. Enter your authentication code, read the License Agreement and, if you accept the terms and conditions of the License Agreement, click **Next**.

Note: The authentication code is issued on completion of X-Cart installation. It is used to prevent unauthorized re-installation of X-Cart. You also need to know this code to install X-Cart modules (if you purchased any). If you do not remember your Auth code, look it up in include/install.php file at any time.

3. The installation script copies the files and makes all the necessary changes in the database.

X-SnS connector installation: Step 1 (installing the module).

Note: If, while running the installation, you get any messages marked red, it means some errors were encountered and the installation has not been completed properly. Resolve the issues interrupting the installation process and run the installation wizard from the beginning.

Click **Next** to proceed.
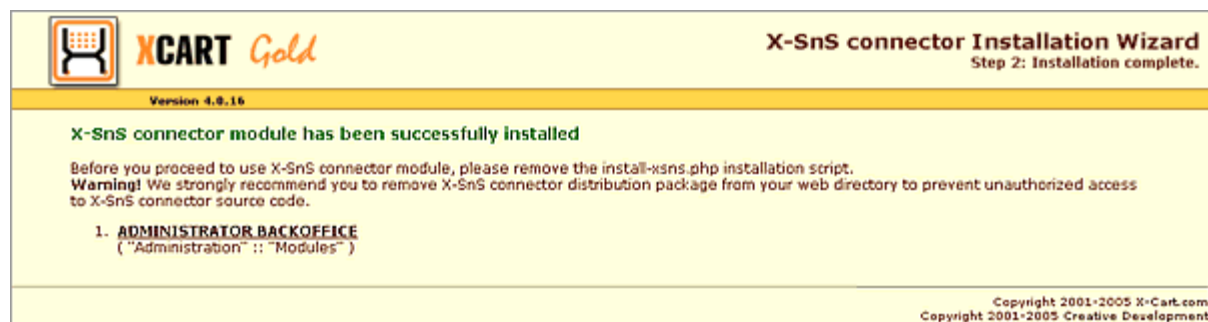
X-SnS connector installation: Step 2 (installation complete).

Now you need to configure the module.

4. Log in to the admin area. In the 'Administration' menu go to the 'Modules' section.

5. Enable the module **SnS connector**.

6. Go to the 'General settings' -> 'Sales-n-Stats connector options' section.

X-Cart admin area, General settings/Sales-n-Stats connector options section.

7. Specify the location of your Sales-n-Stats Data Collector by entering its HTTP URL and, if applicable, HTTPS URL.

Note: If the monitored website has a https version make sure that the domain is the same for both http and https. For example your data collector URLs might be **http://example.com/sns_collector** and **https:// example.com/sns_collector**. If the domain names are different, the same visitor will be identified as two different visitors if he moves from a http to a https page and vice versa.

8. Depending on the platform of your Sales-n-Stats collector (php or ASP.Net), specify the extension of Sales-n-Stats collector files (PHP or ASP).

Note: For the current version of Sales-n-Stats only a php-based collector is available, so choose 'PHP'.

9. Enter the same passphrase that you use to access Data Collector.

10.Click **Submit**.

As a result of SnS connector module installation, the operator button ('Click for Live Help') is automatically integrated into the template skin1/customer/home.tpl. If you do not want your visitors to be able to initiate visitor-to-operator communication, manually remove the following piece of code:

```
<TD width="150" valign="top">
{if $active_modules.SnS_connector}
{include file="modules/SnS_connector/button.tpl"}<BR>
<BR>
{/if}
```

from the template skin1/customer/home.tpl.

After installing and configuring the integration module, you need to import X-Cart-specific settings into your Sales-n-Stats.

Import the settings file

In the Web control and communication center select **File ->Import settings.**

1. Locate the file **xcart-x.y.z.sns.** Click **Open**. 'Import system settings' dialog is displayed.

2. Make sure the necessary check boxes in the 'Import system settings' dialog are selected. Click **OK**. The zones used for Quick start demonstration are replaced in the Site Monitor by the zone set typical for X-Cart (Default zone, Catalog, Product info, Cart, Checkout, Help&Legal).

Do not forget to select the appropriate template set for Sales-n-Stats elements that appear on your X-Cart-based site (**Main Menu -> Tools -> System settings -> Data Collector -> Web templates**).

Integration with X-Cart versions prior 4.0.14

The installation process for X-Cart versions prior 4.0.14 differs for X-Cart version 3.4x and X-Cart versions 3.5. x-4.0.8.

For all X-Cart versions prior 4.0.14 first install the integration module - Sales-n-Stats connector. The installation of the integration module is the same as for X-Cart version 4.0.14. Refer to 'Installing integration module' section for more information.

After installing the module, you need to apply a special patch that enables your X-Cart to function using the module code for X-Cart version 3.4x only. The patch can be applied using the command patch<patch.DIFF. The patch that needs to be applied is a file named patch.DIFF that is located in the directory where your X-Cart is installed (it appears in that directory after you uncompress the module archive and copy the resulting files to your X-Cart root directory). If for some reason you cannot apply the patch in the way described above, manually edit the code of the script config.php located in X-Cart root directory.

To do so you need to insert the following lines:

```
if (!@include_once(../modules/SnS_connector/config.php)
  @include_once(./modules/SnS_connector/config.php);
```

into the very end of the file config.php before the closing tag ?>.

For X-Cart versions 3.4x, 3.5x-4.08 you also need to insert the operator button manually. To insert Sales-n-Stats operator button (Click for Live Help/Leave a Message) into your store website:

- go to Admin area;

- edit templates and insert the line

```
{if $active_modules.SnS_connector}
{include file=modules/SnS_connector/button.tpl}<BR>
<BR>
{/if}
```

into the template responsible for the part of the customer front-end in which you want that button to appear.

Normally it is the template customer/home.tpl (at the top of one of the side columns of the central area of the interface).You should also use the SnS connector of an appropriate version. Do not use the patch for these versions.

Beginning with X-Cart version 4.0.8 all you have to do is install the module and the operation button is integrated automatically.

3.3 HTML Code Generator

HTML Code Generator

HTML Code Generator allows you to get HTML code for integrating Site Tracker and **Click for Live Help** and **Leave a Message** buttons into your website. It also enables you to quickly change the look and feel of the operator buttons. To access it select **Tools -> HTML Code Generator**. A dialog window opens.
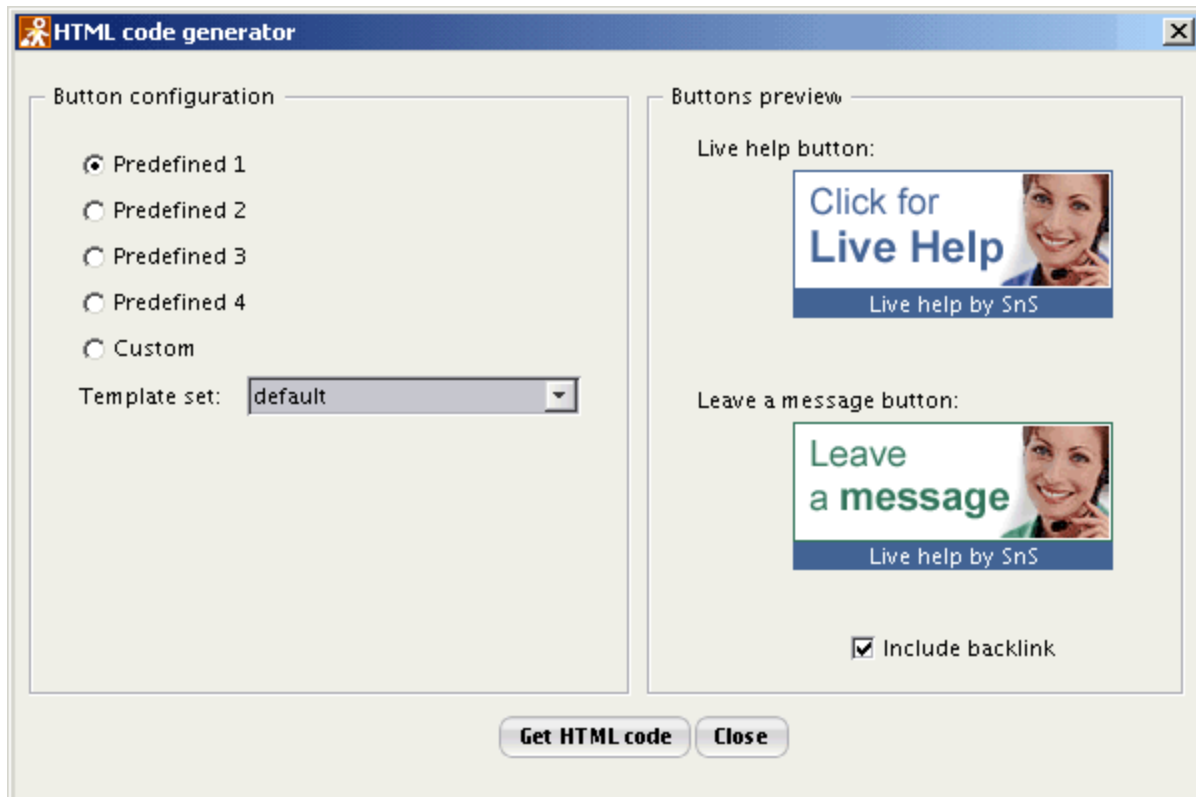

HTML code generator. Main window.

Choose from four predefined button sets. Enable a radio box next to the button configuration and see the corresponding pictures in the 'Buttons preview' section. When you choose the buttons you want to use, do the following:

1. Select the necessary configuration in the 'Button configuration' section.

2. Click on **Get HTML code** button. A window with HTML code opens.

3. Copy the code from the 'Operator button code' section and paste it into your webpage code.

To bring it to conformity with the style of your website change the look of the button. Generate HTML code for any picture you want to use as a 'Click for Live Help' or 'Leave a Message' button. Do the following:

1. Select **Custom** in the 'Button configuration' section.

2. Select the picture you want to use by clicking on the **Change** button in the 'Buttons preview' section.
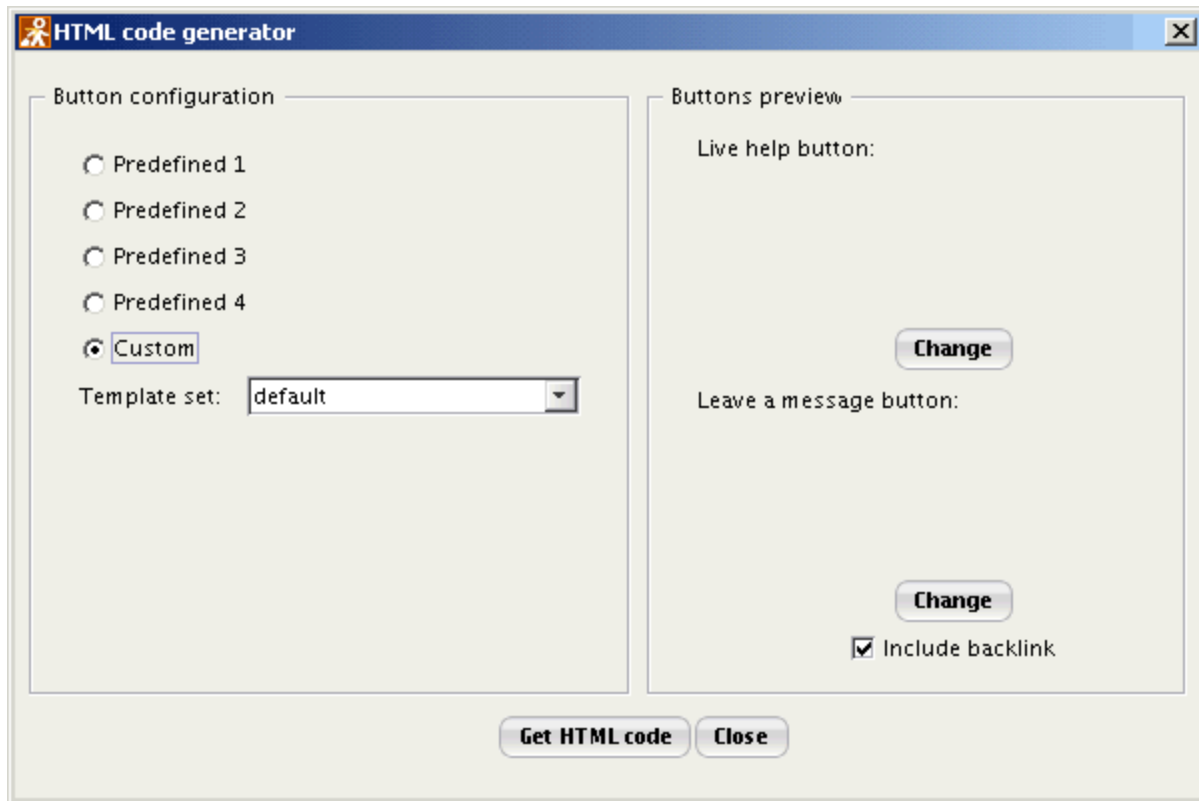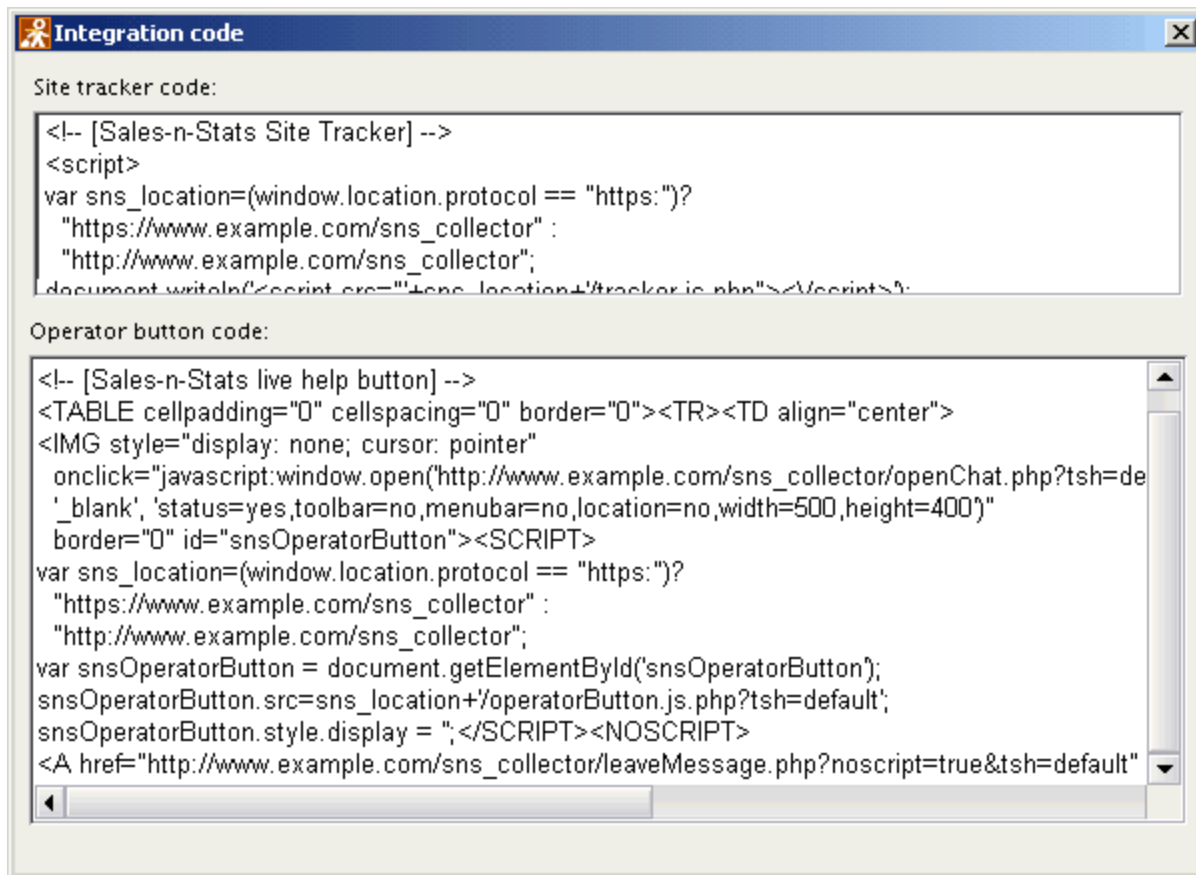

Selecting custom button picture.

3. Click on **Get HTML code** button.

4. Copy the code from the 'Operator button code' section and paste it into your webpage code.

To include a link to Sales-n-Stats in your 'Click for Live Help' buttons, select the 'Include backlink' check box.

To get the code for integrating Site Tracker into your website from HTML Code Generator, select **Tools -> HTML Code Generator,** click on **Get HTML code** button and copy *the* code from 'Site Tracker Code' section.

The window with HTML code.

3.4 Integrating Sales-n-Stats into your website

To enable Sales-n-Stats to gather information about the visitors' activity on a specific site, you need to integrate Sales-n-Stats tracker into that website. The tracker is a script that can collect different kinds of data about your visitors by capturing form elements and span tag values and send them to the Data Center.

The integration of the site tracker is carried out by inserting a piece of code into site pages. As the tracker needs to be present on every page of the site that you want to be monitored, the best way to integrate it is to include the piece of code that calls on the tracker script into the site header/footer area or a template present in each of the site pages. If for some reason the code cannot be included in such a way, you have to insert it into each of the pages of your site manually.

When inserting the code into a web page, make sure you place it within the body of the page only once:

```
<html>
<head>
</head>
<body>
The code goes here
</body>
</html>
```

Create the necessary code using the HTML Code Generator or manually by using the following template:

```
<!-- [Sales-n-Stats Site Tracker] -->
<script>
var sns_location=(window.location.protocol == "https:")?
  "{HTTPSCollectorRoot}" :
  "{CollectorRoot}";
document.writeln('<script src="'+sns_location+'/tracker.js.php"><\/script>');
</script>
<NOSCRIPT><IMG src="{CollectorRoot}/static.php" width="1" height="1"></NOSCRIPT>
<!-- [/Sales-n-Stats Site Tracker] -->
```

where:

- **{CollectorRoot}** is the full URL of the Data Collector directory you entered in the process of Sales-n-Stats installation (such as http://example.com/my/collector/path). This URL must correlate with the cookie domain and cookie path in the Data Collector. If it does not, visitors might be identified incorrectly (for example two visitors can be identified as one).

  For example:

  CollectorRoot: http://example.com/my/collector/path

  cookie domain: example.com

  cookie path: /my/collector/path

- **{HTTPSCollectorRoot}** is the full URL of the Data Collector HTTPS directory (such as https://example.com/my/collector/path).

Note: To ensure the correct operation of the site tracker specify the location of the script by entering the absolute path to the Data Collector.

3.5 Adding a 'Click For Live Help' button

Adding a **'Click for Live Help'** button to your website enables the site visitors to initiate communication with an operator while browsing the site. Depending on the visitor's choice and the operator's availability, the visitor can use this button to contact an operator using a text chat, a voice call or an offline message.

Note: If by any reasons you cannot or do not want to add the **'Click for Live Help'** button to your website, you still can invite a visitor to communication via **Visitor's Badge** from **Site Monitor** or from **Visitors List**. For more information refer to the 'Live Communication' [104] chapter.

The integration of a **'Click for Live Help'** button is carried out by inserting a piece of code into site pages. The best way to make the button accessible from any page of the site would be to include the button code in a template contained in each of the site pages. If for some reason the code cannot be included in such a way, you have to insert it into each of the pages of your site manually.

When inserting the code into a web page, make sure you place it within the body of the page:

```
<html>
<head>
</head>
<body>
The code goes here
</body>
</html>
```

Create the necessary code using the HTML Code Generator or manually by using the following template:

```
<!-- [Sales-n-Stats live help button] -->
<TABLE cellpadding="0" cellspacing="0" border="0"><TR><TD align="center">
<IMG style="display: none; cursor: pointer"
  onclick="javascript:window.open('{CollectorRoot}/openChat.php?tsh=default',
  '_blank', 'status=yes,toolbar=no,menubar=no,location=no,width=500,height=400')"
  border="0" id="snsOperatorButton"><SCRIPT>
var sns_location=(window.location.protocol == "https:")?
  "{HTTPSCollectorRoot}" :
  "{CollectorRoot}";
var snsOperatorButton = document.getElementById('snsOperatorButton');
snsOperatorButton.src=sns_location+'/operatorButton.js.php?tsh=default';
snsOperatorButton.style.display = '';</SCRIPT><NOSCRIPT>
<A href="{CollectorRoot}/leaveMessage.php?noscript=true&tsh=default" target="_blank">
<IMG border="0" src="{CollectorRoot}/operatorButton.js.php?script=no&tsh=default"
  style="cursor: pointer" alt="Powered by Sales-n-Stats">
</A></NOSCRIPT></TD></TR>
<TR><TD height=15 align="center" bgcolor="#fce788">
<FONT size="1" face="Arial">
<A href="http://sales-n-stats.com"
style="text-decoration: none; color: #674435"
target="_blank"><B>Live help by SnS</B></A></FONT>
</TD></TR></TABLE>
<!-- [/Sales-n-Stats live help button] -->
```

where:

- **{CollectorRoot}** is the full URL of the Data Collector directory you entered in the process of Sales-n-Stats installation (such as http://example.com/my/collector/path). This URL must coincide with the cookie domain and cookie path in the Data Collector. If it is not the same, an error message "Sales-n-Stats is integrated incorrectly" will be shown when Open Chat window is displayed.

- **{HTTPSCollectorRoot}** is the full URL of the Data Collector HTTPS directory (such as https://example.com/my/collector/path).

- **tsh=default** means that the default template set should be used to show pushed content and chat invitations. If you want to use a different template set, replace '*default'* with your template folder name.

Note: To ensure the correct operation of the site tracker specify the location of the button script by entering the absolute path to the Data Collector.

By default the button is displayed in GUI mode. If you need the button to be displayed as a link (in text mode), edit the inserted code, so it looks like this:

```
<script src="{CollectorRoot}/operatorButton.js.php?mode=text">
</script>
```

Changing the look of Click for Live Help button

To bring it to conformity with the style of your website change the look of the button. To do so you need to edit the button templates. The button templates that need to be edited are located in the directory `{CollectorRoot}/templates/default`. As there are two forms in which the button can appear ('Click for Live Help' and 'Leave a Message'), do not forget to edit the templates for both of them.

'Click for Live Help' button variant templates:

- operatorButton_LiveHelp.inc (for GUI mode);

- operatorButton_LiveHelp_Text.inc (for text mode).

'Leave a message' button variant templates:

- operatorButton_LeaveMessage.inc (for GUI mode);

- operatorButton_LeaveMessage_Text.inc (for text mode).

The image files live_help.gif and leave_message.gif included in the templates operatorButton_LiveHelp.inc and operatorButton_LeaveMessage.inc respectively are located in the directory `{CollectorRoot}/templates/default/images`.

Important!

When you change the look and feel of any Sales-n-Stats elements that appear on a website, do NOT remove or modify the default template set ({CollectorRoot}/templates/default). It is strongly recommended you keep it intact, to use it if the customization messes up.

A good way to go about customization is to create a new folder inside the directory {CollectorRoot}/templates/ (for example, my_templates) and copy the templates from the default directory to that folder. Then you will be able to assign the new template set (my_templates) to your website via **Main Menu -> Tools -> System settings -> Data Collector -> Web templates**.

Web templates

In fact, it is not necessary to copy the whole default template set to the new template set folder: it is enough to save to that folder only the copies of the templates you are going to modify. Sales-n-Stats will be able to get the rest of the templates from the default template set folder.

Example

Suppose you want to use a different picture (for example, a file live_h.jpg that you have on your computer) for the 'Click for Live Help' button instead of the picture in the image file live_help.gif.

Do the following:

1. Upload the file **live_h.jpg** onto the server where your Sales-n-Stats Data Collector is installed saving it to the images directory of the template set you use for your site.

   - For example, create a folder {Collector Root}/templates/my_templates and a subfolder images within the folder **my_templates**.

   - Copy the template operatorButton_LiveHelp.inc from the directory {CollectorRoot}/templates/default to the directory {CollectorRoot}/templates/my_templates.

   - Save the file live_h.jpg to CollectorRoot}/templates/my_templates/images.

2. Open the file operatorButton_LiveHelp.inc in a text editor.

```
{*
"Click for live help" button template
Template parameters:
{SnsDir}
{TemplateDir}
{ImagesDir}
{Width}
{Height}
*}
document.write('<IMG onclick="javascript:window.top.open(\'{SnsDir}/openChat.php?'+
'{TemplateSetHint}\', \'_blank\', \'status=yes,toolbar=no,menubar=no,location=no,'+
'width=\' + {Width} + \',height=\' + {Height})" border="0" src="{ImagesDir}/'+
'live_help.gif" style="cursor: pointer; cursor: hand"');
```

3. Edit the path to the image file (replace `src="{ImagesDir}/live_help.gif"` by `src="{ImagesDir}/live_h.jpg"`):

```
{*
"Click for live help" button template
Template parameters:
{SnsDir}
{TemplateDir}
{ImagesDir}
{Width}
{Height}
*}
document.write('<IMG onclick="javascript:window.top.open(\'{SnsDir}/openChat.php?'+
'{TemplateSetHint}\', \'_blank\', \'status=yes,toolbar=no,menubar=no,location=no,'+
'width=\' + {Width} + \',height=\' + {Height})" border="0" src="{ImagesDir}/live_h.'+
'jpg" style="cursor: pointer; cursor: hand"');
```

Note: In the code of the templates defining the look of Sales-n-Stats elements used in the process of visitor-to-operator communication, the parameter {ImagesDir} defines the location of the folder images for the current template set. Thus, the parameter {ImagesDir} for the templates located within the directory {CollectorRoot}/templates/default defines the location of the directory {CollectorRoot}/templates/default/images.

After you copy the template operatorButton_LiveHelp.inc from the directory {CollectorRoot}/templates/default to the directory {CollectorRoot}/templates/my_templates keeping the original template code, the parameter {ImagesDir} for the template operatorButton_LiveHelp.inc saved to the directory {CollectorRoot}/templates/my_templates will be interpreted as the location of the directory images within the folder {CollectorRoot}/templates/my_templates. That is why, while changing the button picture, you need to either put the image file live_h.jpg into the folder my_templates/images or modify the image path src="{ImagesDir}/live_help.gif" in the template so it will point to the actual location of the file live_h.jpg.

In our example we chose the first option, so the only modification that was needed for the template was changing the name of the image file from live_help.gif to live_h.jpg. Had we chosen to save the file live_h.jpg to the folder {CollectorRoot}/templates/my_templates, we would have to specify the path to the image file as src="{TemplateDir}/live_h.jpg". Saving the image to the directory where Sales-n-Stats Data Collector is installed would require the path to be specified as src="{SnsDir}/live_h.jpg". Please be aware that in any case the path to

the image file can be specified as a full URL (for example, src="http://myhost.com/my/collector/path/live_h. jpg").

4. Save the file.

5. Go to **Main Menu -> Tools -> System settings -> Data Collector -> Web templates** and assign the template set my_templates to your site. Check the look of the button on the site.

3.6 Customizing Live Communication dialogs

The look and feel of Sales-n-Stats **Live Communication** dialogs can be easily adapted to match the style of the website monitored by means of Sales-n-Stats. The template-based structure of these dialogs makes them customizable to the extent where they may be made to look exactly like the rest of the site pages so your visitors will not even know there is some external software involved.

For editing the templates of the **Live Communication** dialogs, basic knowledge of HTML and CSS is required.

Important!

When you change the look and feel of any Sales-n-Stats elements that appear on a website, do NOT remove or modify the default template set ({CollectorRoot}/templates/default). It is strongly recommended you keep it intact, to use it if the customization messes up.

A good way to go about customization is to create a new folder inside the directory {CollectorRoot}/templates/ (for example, my_templates) and copy the templates from the default directory to that folder. Then you will be able to assign the new template set (my_templates) to your website via **Main Menu -> Tools -> System settings -> Data Collector -> Web templates**.

In fact, it is not necessary to copy the whole default template set to the new template set folder: it is enough to save to that folder only the copies of the templates you are going to modify. Sales-n-Stats will be able to get the rest of the templates from the default template set folder.

Insert your logo in the Live Communication dialogs and popup windows

All Sales-n-Stats dialogs and popup windows used for live communication on the side of a website are supposed to contain the logo of your company. Included into the default template set is the image file logo.gif.

logo.gif

By default this image is displayed in the header of each communication dialog and popup in the place reserved for your company logo. Before going live with your Sales-n-Stats communication tools, you need to replace this image by a logo of your own.
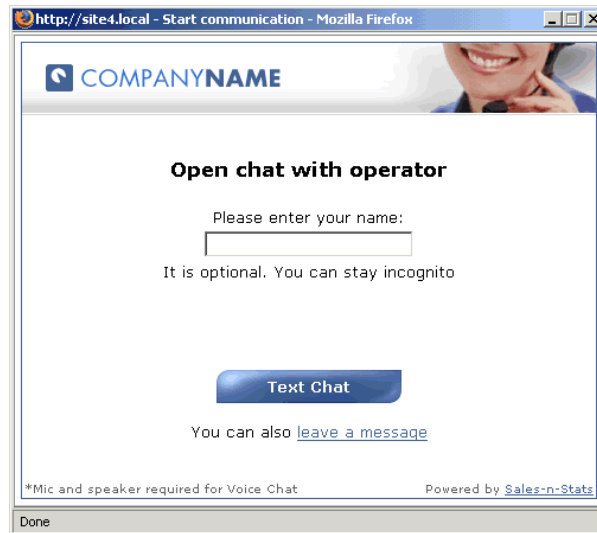
'Start communication': Open chat with operator dialog.

For example, if a visitor clicks on the **'Click for Live Help'** button a standard dialog is displayed. Let us replace the default logo image logo.gif by the file xlogo.gif.

xlogo.gif

Replace the logo file

Choose the template set in which you will use the new logo (for example, **my_templates**). Save the file **xlogo. gif** to the images folder within the directory of that template set.

1. The look of the top of the dialog where the **COMPANYNAME** logo is inserted is defined by the template **header.inc**. Locate the file **header.inc** in the default template set folder and copy it to the folder of the template set you are going to use for your website.

2. Open the file **header.inc** you have just put into the site template set folder in a text editor. Find the following fragment:

```
<!-- Head -->
<TABLE WIDTH="100%" BORDER=0 CELLPADDING=0 CELLSPACING=0>
<TR style="background: #39588C url({ImagesDir}/head_back.gif)" valign=top>
<TD><IMG SRC="{ImagesDir}/logo.gif" ALT=""></TD>
<TD align=right><IMG SRC="{ImagesDir}/contact_h.jpg" WIDTH=185 ALT=""></TD>
</TR>
</TABLE>
<!-- /Head -->
```

4. Replace the path to the image source file **logo.gif** by the path to **xlogo.gif**:

```
<!-- Head -->
<TABLE WIDTH="100%" BORDER=0 CELLPADDING=0 CELLSPACING=0>
<TR style="background: #39588C url({ImagesDir}/head_back.gif)" valign=top>
<TD><IMG SRC="{ImagesDir}/xlogo.gif" ALT=""></TD>
<TD align=right><IMG SRC="{ImagesDir}/contact_h.jpg" WIDTH=185 ALT=""></TD>
</TR>
</TABLE>
<!-- /Head -->
```

5. Save the changes.

Now when you select the modified template set for your site via the 'Web templates' section of the System settings, the 'Live Communication' dialog headers change their look.

Note: The template header.inc includes two more files: head_back.gif (the background image) and contact_h. jpg (the image in the right part of the header). Replace these files in the same way we replaced logo.gif by our own image.
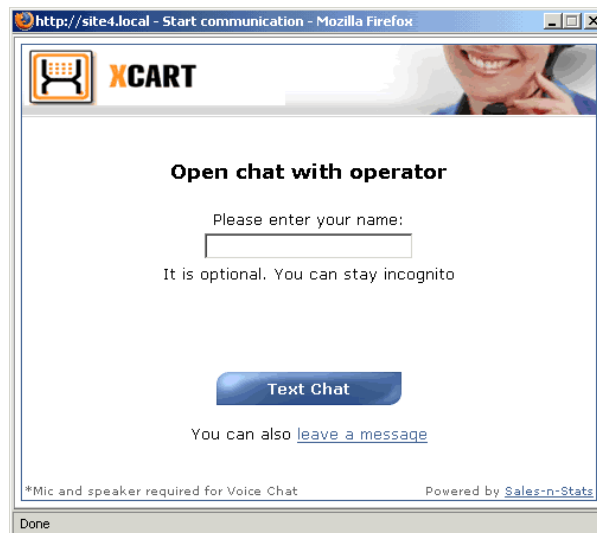
A new logo inserted into the header template (Example)

Edit text elements in the Live Communication dialogs and popup windows

To edit a text piece contained in a **'Live Communication'** dialog or popup window, you need to find out what template is responsible for displaying this text.

In the majority of cases the text piece is part of the template itself. Editing the text which is part of a template is probably the easiest: all you need to do is open the template in a text editor, change the text and save the changes.

For example, we can change the instructions for entering the nickname in the dialog from which visitors start a

chat with Sales-n-Stats operator:
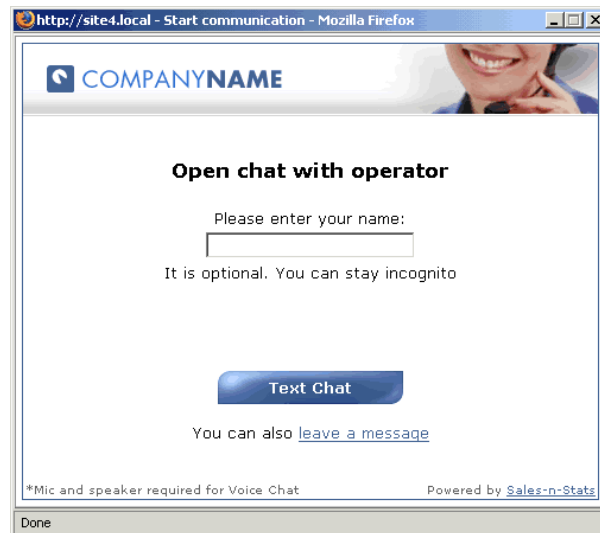
'Start communication': Open chat with operator dialog. The text
around the input box can be edited directly via the template
openChat.inc.

1. Copy the template openChat.inc to the directory of the template set you use for your site.

2. Open the file openChat.inc from that directory and find the following fragment:

```
<!-- [Nick name enter field] -->
<TABLE>
    <TR align="center"><TD class="sns">Please enter your name:</TD></TR>
        <TR align="center"><TD class="sns"><INPUT type="text" ID="nick" size="25
" onkeypress="nickName_keyPressed(event)"></TD></TR>
        <TR align="center"><TD class="sns">It is optional. You can stay incognito</TD></TR>
</TABLE>
<!-- [/Nick name enter field] -->
```

3. Edit the text:

```
<!-- [Nick name enter field] -->
<TABLE>
    <TR align="center"><TD class="sns">Pick a screenname:</TD></TR>
        <TR align="center"><TD class="sns"><INPUT type="text" ID="nick" size="25
" onkeypress="nickName_keyPressed(event)"></TD></TR>
        <TR align="center"><TD class="sns">(optional)</TD></TR>
</TABLE>
<!-- [/Nick name enter field] -->
```

4. Save the changes.

The result looks like this:

The text around the input box has been edited (Example)

> **Note**: Certain text elements cannot be changed by editing the text in a template, as they are received by the template in the form of a parameter value passed from the PHP code (For example, in Sales-n-Stats **Live edition** the dialog titles **Leave a message** or **Open chat with operator** are received in the form of the parameter {Title}). If this is the case with the element you would like to edit, the only way to change the text displayed in your 'Live Communication' dialogs is to modify the PHP code responsible for the element.

Edit the templates of the Live Communication dialogs and popup windows

To modify the look of your Sales-n-Stats Live Communication dialogs and popup windows more thoroughly than just changing the logo, a deeper understanding of the dialog and window structure is needed. Let us take a closer look at the default template set shipped with Sales-n-Stats.

Some of the templates are used in more than one dialog/popup and thus should be mentioned separately:

- **startDialog.inc, endDialog.inc** - start and end templates of the window dialogs; provide a setting for the header and footer of a dialog; must be used together.

- **htmlLayerPopup.inc** - javascript code that is responsible for displaying a popup window to a visitor; includes a header and a footer.

- **header.inc, footer.inc** - top and bottom of the communication dialogs and popup windows; must be used together. Please note that the template header.inc includes some images (logo.gif, contact_h.jpg and head_back.gif) and the dialog title. The template footer.inc includes the *Powered by Sales-n-Stats* link.

- **subheader.inc** subheader for the standard header.inc template.

- **button.inc** standard button template (for example, the **Text chat**, **Start chat**, **Save file**, **Open** buttons, etc).

- **smallButton.inc** template for the buttons smaller than 70 px in width (for example, the **Send** button in the chat window).

For your convenience we provide a list of 'Live Communication' dialogs and 'Push Content' popup windows with the templates used to display each dialog/window in the <u>'Appendices' -> 'Live Communication dialog templates'</u> [229] section.

Use CSS to change the look of your Live Communication dialogs

The style and layout of Sales-n-Stats 'Live Communication' dialogs and popup windows can be controlled using CSS (Cascading Style Sheets). The styles defining how to display the elements of these dialogs and windows are stored in the external style sheet style.css. Modify this file to change colors, fonts, spacing and other properties.

Note: By default style.css is located in the directory {CollectorRoot}/templates/default defining the look of elements assembled from the default template set. As it is not recommended to modify the files of the default template set, make a copy of the default template set (including style.css) and save it to a separate folder within the directory {CollectroRoot}/templates (for example, {CollectorRoot}/templates/my_templates). Then you will be able to edit the file style.css for your sites template set.

The file style.css consists merely of style rules in the format of selector {property: value}

The selector is the HTML element/tag being defined, the property is the attribute which can be changed, and the value is the value this property can take. The property and value are separated by a colon and surrounded by curly braces. If more than one property is specified, each property is separated with a semi-colon. The example below shows how the look of a link is defined:

```
A.sns:link {
        COLOR: #426195; TEXT-DECORATION: underline
}
```

When more than one selector use the same style definition, the selectors may be grouped:

body.sns, p.sns, div.sns, th.sns,

td.sns, input.sns, select.sns, textarea.sns

span.sns

```
{
        FONT-SIZE: 13px;
        COLOR: #000000;
        FONT-FAMILY: Verdana, Arial, Helvetica, Sans-serif;
}
```

If the tag name in the selector is omitted, it means the style is used by all HTML elements that have this class. In the example below, all HTML elements with class="sns_WindowBack" have a white background color:

```
.sns_WindowBack {
        BACKGROUND-COLOR: #ffffff
}
```

Generally speaking, find out the style of any HTML element by the class attributed to it. For example, to know what style rules regulate the appearance of the dialog title, find the template that defines the look of the dialog header and find in this template the lines defining the look of the title. There will be an indication of the class attributed to the dialog title element.

The name of the header template is header.inc. Open it and find the following lines:

```
{Subheader}
<TR valign="middle"><TD>
<DIV ID="dialogTitle" class="sns_Header" align="center" style="padding: 20px">{Title}</DIV>
</TD></TR>
```

The fragment class=sns_Header means that the title follows the rules in the ".sns_Header" selector. Now open the file style.css and find the appropriate style definition:

```
.sns_Header {
        font-size: 13pt;
        font-weight: bold;
        font-family: Verdana;
        color: black;
}
```

Knowing the properties of the dialog title element, you can modify the look of text appearing in the title. Before any modifications are made to the file style.css, the dialog 'Start communication': Open chat with operator looks like this:
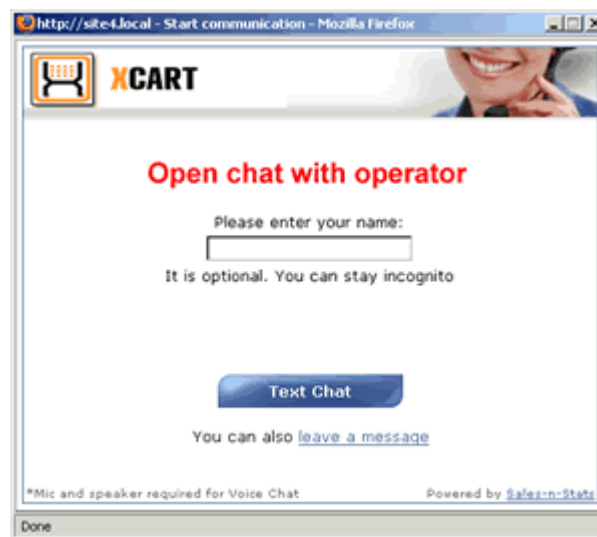
'Start communication': Open chat with operator dialog.

If you then edit the file style.css so the style definition looks like this:

```
.sns_Header {
        font-size: 20pt;
        font-weight: bold;
        font-family: Verdana;
        color: red;
}
```

the appearance of the title will be changed:

'Start communication': Open chat with operator dialog: font
size - 20pt; text color - red.

Similarly change the look of other elements.

Further reading on CSS:

W3C Cascading Style Sheets homepage: http://www.w3.org/Style/CSS

W3C CSS Validation Service: http://jigsaw.w3.org/css-validator/

See also:

Live Communication dialog templates 229

3.7 Implementing external actions

Sales-n-Stats supports two major types of actions: pattern driven and external. For pattern driven actions you have to set up action variants - patterns of a visitor's activity on the site which can be qualified as actions. Sales-n-Stats receives data about page views and form submits from the site and then, based on that information, determines what kind of action it is. Pattern driven actions are a fairly reliable way of getting information about what the visitors are doing. However, in some cases it may be impossible to unambiguously define an action by means of action variants. For such cases external actions can be used. Unlike pattern driven actions, external actions are recognized directly on the website by a piece of software hard-coded into the web application (e.g. a shopping cart), and only then are passed to Sales-n-Stats. When adjusted to function that way, Sales-n-Stats does not need to perform action recognition by interpreting basic data (page URLs and form fields), but receives actions already determined externally. In this sense external actions are more reliable and should be given preference when deciding on the way of setting up actions for your system. To implement external actions, some coding skills are required. If you are not sure, turn to our technical support specialists.

Note: Sales-n-Stats integration modules for **LiteCommerce** and **X-Cart** software are based on external actions, so if you are using these shopping systems you need not worry about coding: as a result of the integration module installation all the necessary external actions get implemented automatically. Find the list of shopping cart specific external actions used by LiteCommerce and X-Cart integration modules in the 'Appendices' 224 section of this manual.

If you decide you want external actions for your system, the first thing you should do is go to the 'Actions' section of the 'System settings' (**Main Menu -> Tools -> System settings -> Actions**) and create the actions you need. For more details refer to section 'Creating actions' 165 in the 'Setting up action patterns' 159 chapter. Then proceed to modifying your web application so it can determine actions.

From the client's point of view, an External action is a POST request from the web application to the Data Collector script at the following address: {CollectorRoot}/event.php. At the moment only a .php version of Data Collector is provided.

The POST query must contain the following variables:

- clientId - is taken from the cookie named personal_client_id

- timestamp - current timestamp (that is, number of seconds since Unix epoch (January 1st 1970)

- passphrase - the passphrase you used during the collector installation.

- action[0] - Parameters of the first action in the list

- action[1] - Parameters of the second action in the list and so on

As is seen above, you can include several actions into one query. The actions included into a query must be numbered (beginning with zero); the action numbers must come in brackets.

Each action[n] variable must contain (a) the name of the action, and (b) values of the parameters of this action in the following form:

```
name=<action name>&<param1_name>=<param1_value>&...
```

The *name* variable specifies the action name. The action name matches the contents of the 'Class name' field in the action setup dialog except the trailing Action. For example, if the class name is AddToCartAction, only the AddToCart part should be passed to the collector. Action parameter names should correspond to the names of Action fields in the action setup dialog. All variable values must be URL encoded.

Example

The action 'Add to cart' has the following fields:
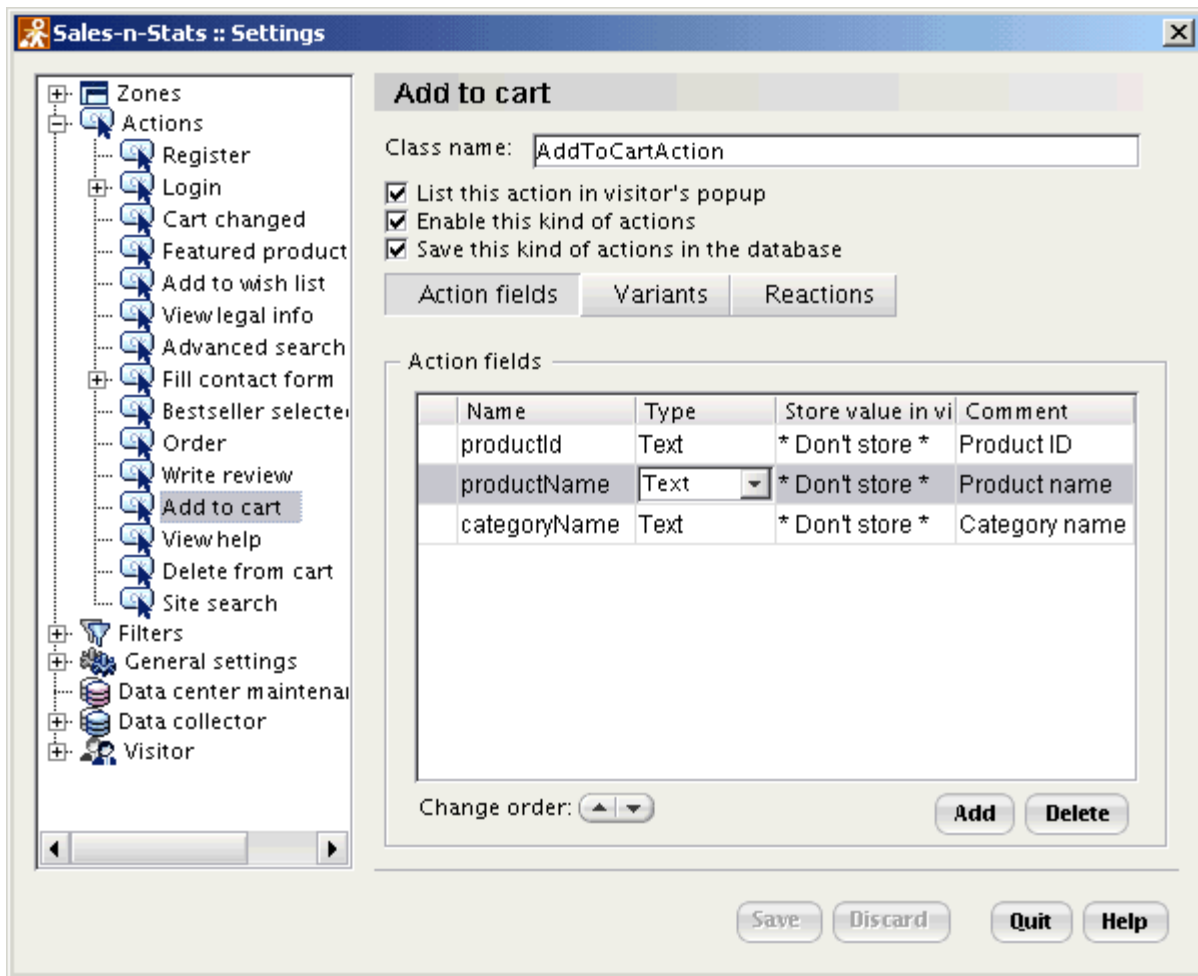
'Action setup' dialog.

The data passed to the collector in the action variable as a result of adding to the shopping cart of a product *Java In a Nutshell* (Product ID: 70, Category: Books/Internet) may look like this:

```
name=AddToCart&ProductID=70&Product_name=Java+In+a+Nutshell&Category_name=Books%2FInternet
```

Sales-n-Stats PHP API

As an example and working implementation of an external action logic in PHP we provide Sales-n-Stats PHP API library. Obtain it from your HelpDesk account. The library facilitates the process of Sales-n-Stats integration with a website. PHP API library consists of a few components:

- **SnsIntegration.php** – the main integration module you must include in your scripts; it contains the func_sns_request function that is used to send actions from the website to Sales-n-Stats collector and the

func_get_sns_client_id function that identifies a visitor using his cookie data on your site;

- **HTTP/Request.php** – a standard PEAR HTTP/Request module used to post data to collector;

- **Net/URL.php and Net/Socket.php** – PEAR modules used by HTTP/Request.php;

- **PEAR.php** – the standard PEAR unit (You can replace it with your system-wide version). It is required by the previous PEAR modules;

The func_sns_request call uses the following syntax:

- **func_sns_request**($collectorURL, $collectorLanguage, $clientId, $actions, $passphrase)

where

- **$collectorURL** is the full-qualified URL of the collector directory without the trailing '/',

- **$collectorLanguage** is the script extension (use 'php'),

- **$clientId** - visitor ID. It can be acquired with the help of function func_get_sns_client_id

- **$actions** - set of actions for sending.

  $actions is an array of actions, each element of which is a string in the following format:

  ```
  name=<action name>&<param1 name>=<param1 value>&…
  ```

- **$passphrase** - passphrase for Data Collector.

The cookie variable is generated by the tracker JavaScript code and identifies the visitors of your site.

The file sample.php contained in the library provides an example of external actions' implementation:

```php
<?php

    require_once("SnsIntegration.php");

    // this cookie is set by tracker.js.php when including in your site
    $snsClientId        = func_get_sns_client_id();

    // let's add a product to cart
    $itemsCount         = 1;
    $productName        = "Sample product";
    $productId          = "123";
    $categoryName       = "Sample category";

    // do not include the trailing '/' in collector URL
    $collectorURL       = "http://www.your_domain/your_collector_path"
    $collectorLanguage  = "php";
    $passphrase         = "letmein";

    $actions = array();   // you may bundle several actions in the same query

    // the action name must match one of the actions' class names
        // listed in your 'setup/actions' dialog
    $action = "name=AddToCart";
    $action .= "&productId=".urlencode($productId);
    $action .= "&productName=".urlencode($productName);
    $action .= "&categoryName=".urlencode($categoryName);
    $actions []= $action;

    $action = "name=CartChanged";
    $action .= "&itemsCount=" . $itemsCount;
    $actions []= $action;

    // performs an HTTP post to event.php (or event.aspx, depending on
    // $collectorLanguage variable)
    $result = func_sns_request($collectorURL, $collectorLanguage, $snsClientId,
                               $actions, $passphrase);
?>
```

See also:

[Preconfigured actions](#)|224|

3.8 Defining P3P Policy for your website

Sales-n-Stats software can collect various information about website visitors which can be used later to improve an online business and to help serve customers better. However, this information can be easily abused if the site owner uses it for other purposes, such as sending spam or selling it to a third party. That is why it is standard practice to have a privacy policy at your website explaining what user information is collected and what purposes it is used for.

Since it may be very tedious to read a privacy policy on every site, the World Wide Web Consortium (W3C) developed The Platform for Privacy Preferences Project (P3P) which allows websites to post their privacy policy in a machine-readable format. When information about a site's privacy practices is available in P3P format, the web browser can promptly advise the user visiting this site if the privacy policy of the site satisfies the selected level of privacy. Of course, machine-readable policy does not substitute for human-readable text and is only an extension that makes online experience more comfortable.

Modern web browsers check site Compact Policy before accepting cookies from the site. Sales-n-Stats JavaScript tracker sends Compact Policy in HTTP headers to comply with P3P requirement.

Sales-n-Stats is shipped with P3P policy that is typical for an average e-commerce website and is suitable in most cases, however, if your privacy policy differs from the default privacy policy, you should edit P3P Policy field in the Collector settings dialog so it matches the actual privacy policy of your site.

Below is the default Sales-n-Stats compact privacy policy shipped with the system:

CP="NON CURa ADMa DEVa TAIa CONi OUR DELa BUS IND PHY ONL UNI PUR COM NAV DEM STA"

Description

NON   No access is available to collected information.

CURa   The data is used for completion of the current activity.

ADMa   The data is used for site administration.

DEVa   The data is used for research and development.

TAIa   The data is used for tailoring the site.

CONi   The data is used for contacting the user, if the user selects it.

OUR   The data is given to ourselves and our agents.

DELa   The data is given to delivery services.

BUS   Our business practices specify how long the data will be kept.

IND   The data will be kept indefinitely.

PHY   Physical contact information is collected.

ONL   Online contact information is collected.

UNI   Unique identifiers are collected.

PUR   Purchase information is collected.

COM   Computer information is collected.

NAV   Navigation and clickstream data is collected.

DEM   Demographic and socioeconomic data is collected.

STA   State-management data is collected

For the full Compact Policy Vocabulary please refer to the Platform of Privacy Preferences specification available at W3C Consortium website http://www.w3.org/P3P/

We also recommend you download IBM P3P Policy Editor software http://www.alphaworks.ibm.com/tech/p3peditor that allows to create your own P3P policy in a visual mode.

Disclaimer: The P3P policy shipped with Sales-n-Stats software is a sample policy provided for reference purposes only. It is your responsibility to make sure that P3P policy defined in the Collector settings matches the actual privacy policy of your website.

4. Getting started

This chapter helps you quickly start working with Sales-n-Stats and receive first results right away.

Use Sales-n-Stats settings to configure it to function the way your business requires. To integrate Sales-n-Stats with your website employ the 'Import settings' functionality. The preconfigured settings come as separate files with .sns extension. They contain all the necessary setting changes that are suggested to make for specific types of websites. Select **File ->Import settings** in the Main Menu of Web control and communication center, locate the necessary file and select the check boxes of the wanted settings.

You receive the files with preconfigured settings for shopping systems like X-Cart, LiteCommerce and other compatible software. Find the full list of compatible software on our website at http://www.sales-n-stats.com. If you have such software installed, for more information on importing settings refer to Using Sales-n-Stats with X-Cart software 41 or Using Sales-n-Stats with LiteCommerce software 36 chapters.

If you are integrating Sales-n-Stats with your website manually, the essential steps you need to take are as follows:

1. Integrate tracker JavaScript code into the website. 46

After doing that use Sales-n-Stats to monitor your site and get some specific results right away. See the visitors of your website on Site Monitor. For **X-Cart**, **LiteCommerce** and other compatible shopping systems the zones are preset. Otherwise all the visitors appear in one zone called 'Default'. For more information about zones refer to the following chapters:

Zones 71 - basic set of zones, using zones for online monitoring, adjusting Site Monitor layout.

Setting up Zones 182 - practical advice on how to set up the necessary zones.

2. Add 'Click for Live Help' buttons to the website 48 .

Now the visitors can require live help or leave a message for the operator if he is offline. For general information about the types of communication used in Sales-n-Stats refer to Communication 89 chapter. The operator can talk with visitors via text or voice chat. 'Push' functionality 123 (see Live Communication chapter) allows to send a file, an image or an HTML message directly to the visitors' browser or direct them to specific URLs.

Read more in Live Communication 104 and Offline Communication 115 chapters.

A visitor is represented on the Site Monitor with a graphical badge that summarizes some key information about him and his interaction with your website. Visitor's Badge is configurable and not only shows various information about a visitor but also signalizes about certain events occurring at your website. The following chapters contain useful information:

Visitor's Badge configuration 82 - details of badge structure.

Setting up the Visitor's Badge 206 - practical instructions on how to configure the Visitor's Badge to meet your business requirements.

By double-clicking on any of Visitor's Badges in your Site Monitor you get access to the Visitor's Profile that stores all the information about the visitor for all visits.

Managing the Visitor's Profile 96 - advice on what kind of information you get from the Visitor's Profile.

Setting up the Visitor's Profile 202 - configuration instructions.

The Sales-n-Stats system delivers the statistical solid facts and figures. You get a comprehensive set of preconfigured reports that helps you to analyze all edges of your e-business including Web statistics, e-commerce reports, Visitor statistics.

All reports have adjustable parameters and can be printed immediately. If the set of standard reports does not exactly match your business requirements create custom reports with the help of the built-in visual report constructor that allows to design professionally looking reports within several minutes.

To get an idea on how your business works, what kind of visitors come to your site, which advertising campaigns bring the most traffic or when the sales increase go to the 'Reports' section of Web Control and Communication Center. Use the corresponding chapters to find information on Using reports 126, Built-in reports 130, and Creating reports 134.

The chapter Administrating Sales-n-Stats 141 contains information about all the settings and the ways to customize the software. Refer to it to learn more about setting up action patterns 159, managing filters 189, changing Data Collector settings 194 and other related topics.

4.1 Zones

Using zones for online monitoring

After you set up zones in Sales-n-Stats web control and communication center, the sections of your site corresponding to these zones become subject to online monitoring.

Sales-n-Stats operator performs online monitoring via the 'Site Monitor' section of the Web control and communication center terminal. This section includes two major components: the **Monitor** and the **Zones Switch Board**.
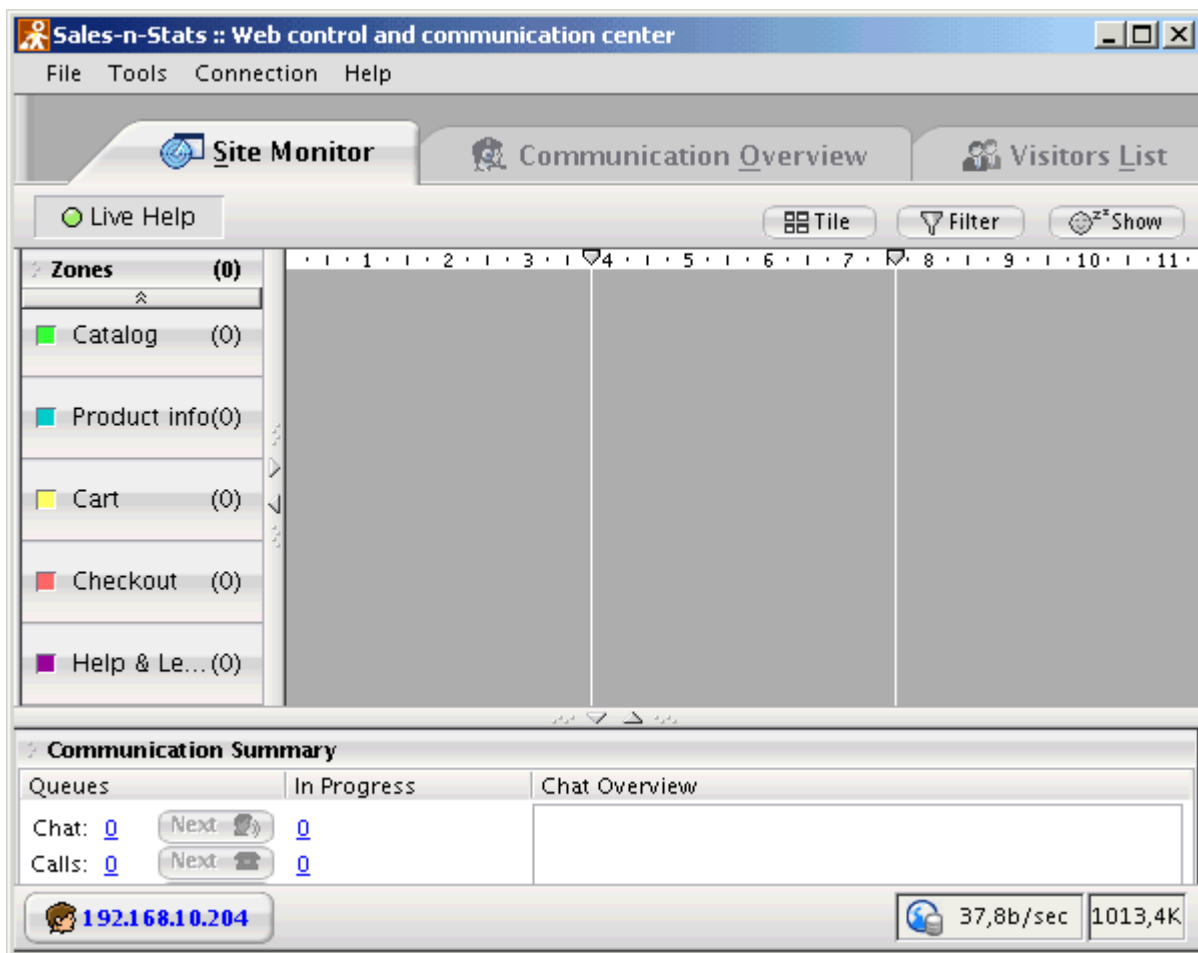
'Site Monitor' section.

The Monitor occupies the larger part of the 'Site Monitor' pane, it is the working area in which site zones appear. The Zones Switch Board is a side panel located to the left of the monitor area that allows the operator to control what zones get displayed on the monitor.

At the first start of the Operator Terminal, the monitor area is empty. All the zones available for monitoring appear in the form of zone buttons on the zones switch board. Each zone button corresponds to a specific zone on your site. The name of the zone is written on the button. The number in parentheses next to the zone name shows the number of users currently visiting the zone.

To find out what is happening in a specific zone, you need to unfold this zone so it appears on the monitor. Click on the button corresponding to the zone you want to view. The button becomes "activated" and the zone is visualized in the form of a zone window.
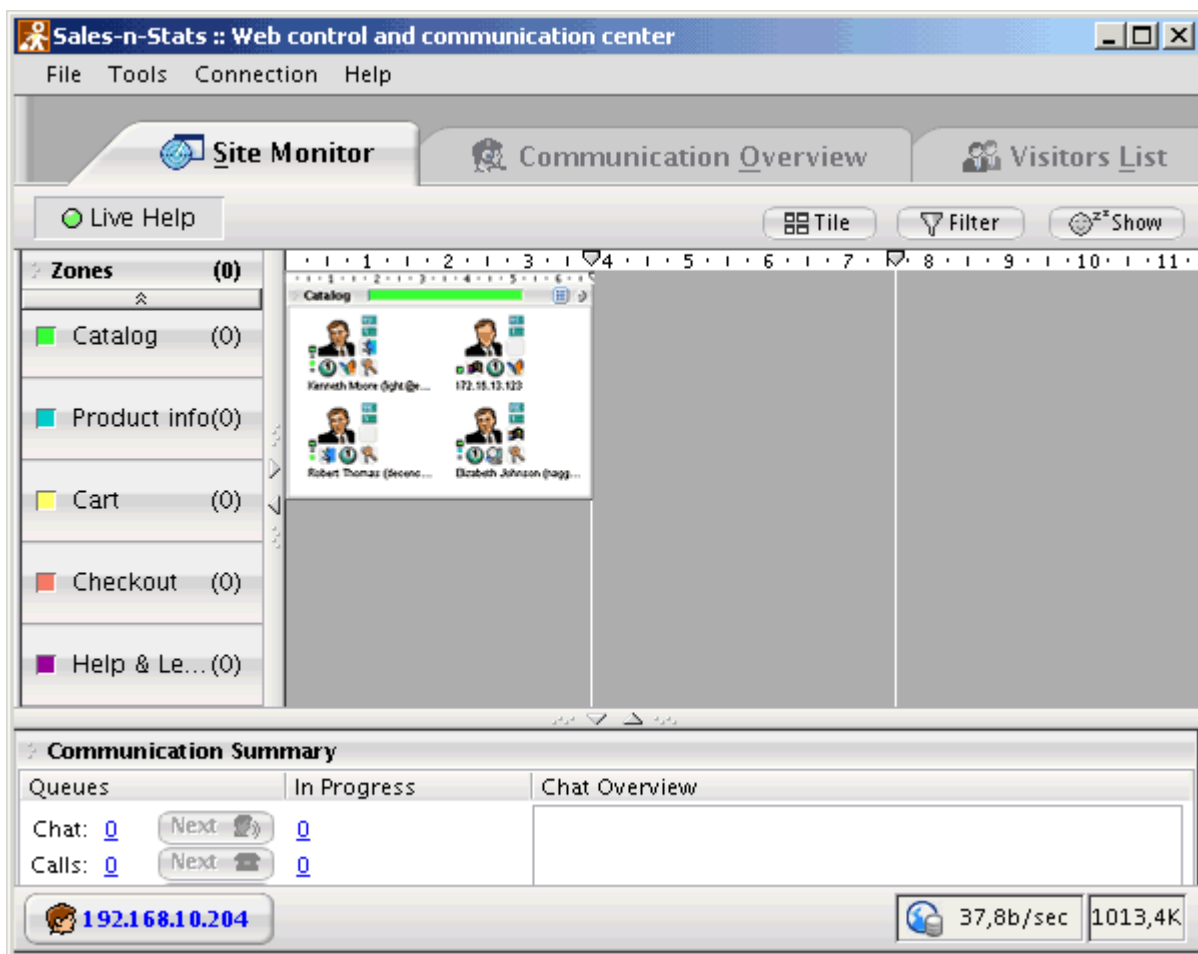
'Site Monitor' section: 'Catalog' zone is opened on the monitor.

If there are any users visiting the zone you unfolded in the monitor, you see their visitor badges inside the zone window. The Detailed/Compact View switch on the zone window title bar allows you to switch between compact and detailed badge view within the zone.
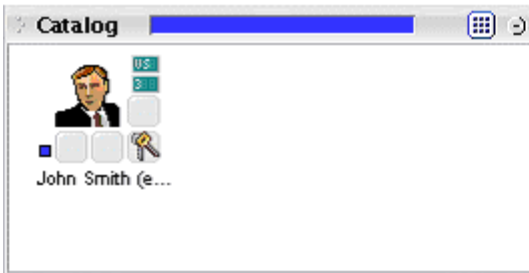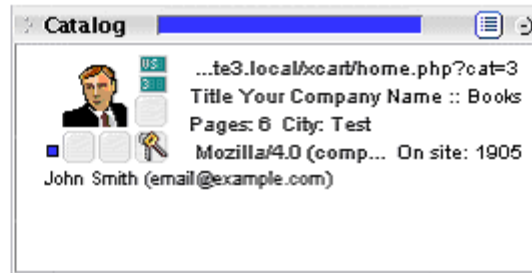
a) Compact view   b) Detailed view

'Catalog' zone window displaying a visitor's badge

The title bar of a zone window displays the name of the zone and includes a color bar. The color is different for each individual zone which is meant to help you differentiate between the zones when several zones are opened on the site monitor simultaneously. When a customer passes through a zone, he is "stained" with the color of that zone so the history of his movements can be easily seen on the Zone Tracking Bar of the Visitor's Badge.

Zone buttons stay pressed all the time while the corresponding zones are displayed in the monitor area. To close a zone window displayed on the monitor, click the 'Close' control in the zone window title bar or click the pressed zone button corresponding to this zone on the zone switch board. The zone disappears from the monitor and the zone button regains its not pressed in look.

Zone windows appearing on the monitor are resizable, to change their location drag them within the monitor area. Sales-n-Stats "remembers" the size and position of the zone windows on the monitor and next time you start the Operator Terminal, the zone windows reappear on the monitor the way you left them there.

Adjusting the layout of the monitor

There are no software limitations as to the number of zone windows that can be simultaneously opened in the monitor area. However, in practice the question is not how many zone windows can be opened, but what amount of information within a zone window you can see.

The monitor area is divided into three sections by two thin vertical lines going downward from the two movable markers on the horizontal ruler above the monitor area.
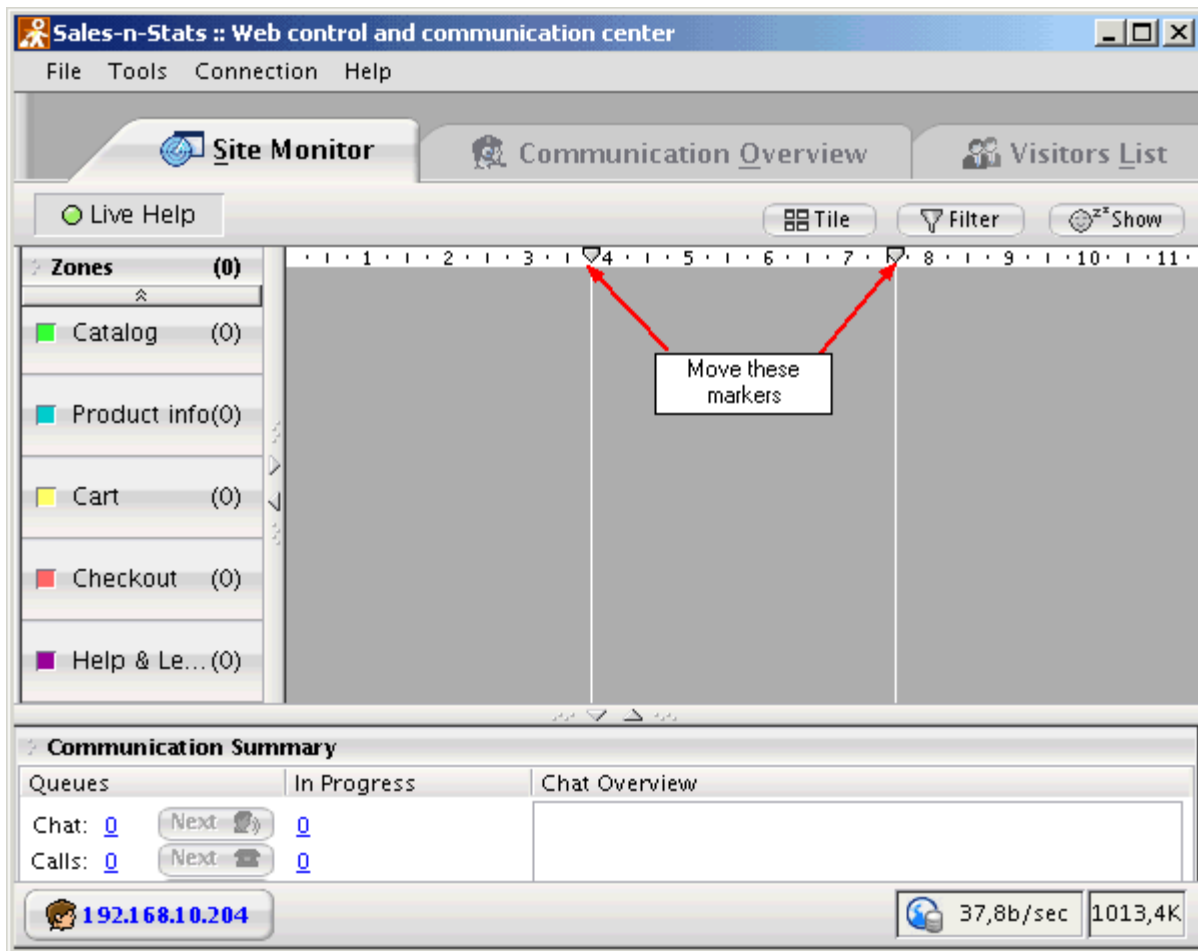
'Site Monitor' section: horizontal ruler, ruler markers and vertical lines dividing the monitor into three sections.

When you click a zone button, a zone window corresponding to this zone is supposed to open in one of the three sections of the monitor. If you open more than one zone, they open left to right and top to bottom. If there is no more space on the monitor for the new zone windows to fit in, the new windows begin to open on top of the first layer in a cascade from the upper left corner.

After you opened the zone windows for the first time and adjusted their position, they resume this position even if you close and then open them again. To change the size of a window, drag the window frame from the right or bottom side or bottom right corner. Note that a zone window has a fixed minimal size of 70 x 80 px and cannot be made smaller than that. The maximal size to which a zone window can be expanded equals the size of the monitor area. To maximize a zone window, double-click on its title bar.

To move a window to a new location within the monitor pane, drag it by the title bar. Zone windows can be placed anywhere within the monitor, including that they can overlap and even cover other zone windows completely.

Considering that zone windows can be placed in layers on top of one another and that their sizes can be modified, we can say that the number of zone windows that can be opened in the monitor area is practically unlimited, but placement on the monitor of a large number of zones with overlaps makes the work of Sales-n-Stats operator inefficient.

Tiling

Tiling is a functionality that helps you keep your zone windows organized. It automatically flattens the zones on the monitor with the help of the ruler markers and vertical dividing lines mentioned above so the zones fit together with no gaps or overlaps. To get an idea about how it works, drag markers on the horizontal ruler and click **'Tile'**. Then move zone windows across the Site Monitor and click **'Tile'** again.

Use tiling to arrange the zone windows in almost any pattern:

- To make a few zone windows the same size, adjust the width of a monitor section accordingly, drag these windows to this section and click on **Tile**.

- To move a zone window from one monitor section to another, drag the zone window by the title bar so its largest part is located over the desired section and click on **Tile**.

Note: Tiling can be a convenient way to bring a maximized zone window back to its normal size.

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See also:

[*Setting up zones*](#) 182

4.2 Filters

Filters facilitate the work of Sales-n-Stats operator in situations where the monitored website is visited by large numbers of users. As it may become difficult to keep an eye on a particular visitor when the monitor is swarming with users, we decided to provide a tool that reduces the number of visitors that are simultaneously shown on the monitor and allows you to focus on a particular group of visitors.

Filters provide means for sorting visitors. Basically, a filter is a set of conditions. When you apply a filter, Sales-n-Stats checks whether the characteristics of each visitor browsing your site satisfy these conditions. The visitors whose characteristics meet the conditions of the applied filter remain on the monitor. The rest of the visitors fade and become invisible for the operator.

Sales-n-Stats allows you to set up a great variety of conditions in different combinations to create filters. By default conditions within a filter are joined by the logical operator AND. For example, to create a filter that allows you to view only the customers from U.S. who currently have at least 2 product items in the shopping cart, you have to set up a filter with two conditions: "the customer's country of origin is U.S." AND "the number of product items in the customer's shopping cart is 2 or more". After this filter is applied, the badges of all the visitors of non-U.S. origin (including those with 2 or more product items in the cart) and all the visitors with less than 2 product items in the cart (including those of U.S. origin) are removed from the monitor, leaving the group of visitors that you wanted to see.

To find out how to create your own filters refer to the chapter 'Managing filters' 189.

Sales-n-Stats provides a set of predefined filters to use with e-commerce sites. Formally they can be divided into relevance filters and focusing filters.

Relevance filters help you reduce the number of the visitors on the monitor by removing irrelevant visitors.

- **Remove casual visitors** reduces the number of the visitors on the monitor by removing the customers who have just arrived at the website.

- **Remove non cooperative** removes from the monitor the visitors who declined the chat invitation from the operator (this filter, however, does not prevent the visitors removed from the monitor to contact the operator).

Focusing filters help you to concentrate on a group of visitors that is the most important to you at the moment.

- **Show only registered visitors** shows those visitors who have registered in the system.

- **Show only existing customers** shows the returning visitors (the users who have already purchased something at your store on one of their previous visits).

- **Show visitors that have products in cart** shows the users who have already added some products to their shopping carts during the current visit.

Each filter can be applied separately or in combination with other filters. To apply one filter or a combination of filters, do the following:

1. Click on the **Filter** button located at the top right of the monitor area.

Note: The steps that follow demonstrate how a filter can be applied to focus just on the visitors who have some products in the cart.

2. Select the check box next to the name of the filter you want to apply. To apply a combination of filters, select several check boxes.
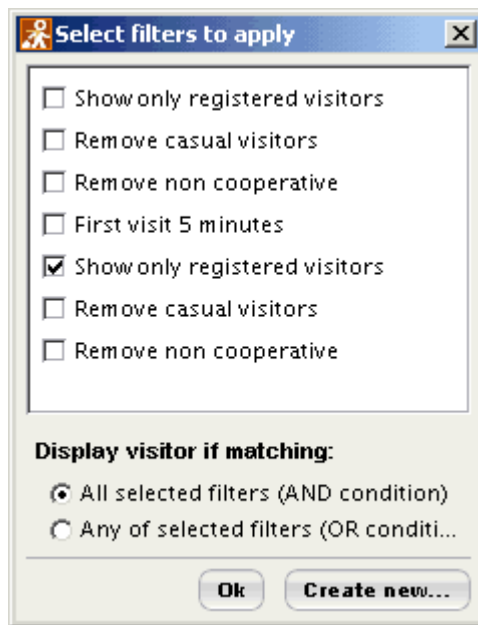
'Show only registered visitors' filter has been selected.

3. If at **Step 2** you selected several filters, specify the way in which they should be combined. To do so, refer to the part of the window saying 'Display visitor if matching:' and select one of the options:

- **'All selected filters (AND condition)'** – if you want the site monitor to display only the visitors satisfying the conditions of ALL the selected filters.

- **'Any of selected filters (OR condition)'** – if you need to see the visitors satisfying the conditions of at least one of the selected filters.

4. Click **OK**.

If after applying a filter or a combination of filters you want to see all the visitors back on the monitor again, do the following:

1. Click **Filter**.

2. Unselect the check boxes of the currently applied filters.

3. Click **OK**. The filters are disabled and you see all the visitors.

'Hide/Show "sleeping" visitors' functionality

There is a special type of filter that allows you to hide the badges of the visitors that have had 'sleeping' status for a certain period of time which you specify via **Tools->System settings->General settings->General**. After the visitor has viewed the same site page for the number of seconds specified in 'Sleep timeout', he is considered sleeping.

This filter can be applied by clicking just once on the **Hide/Show sleeping visitors** button. After the application of this filter all the badges displayed with the 'sleeping' status icon are removed from the monitor. Please note how the **Hide/Show sleeping visitors** button changes.

To make the hidden badges reappear on the screen, click on the **Hide/Show sleeping visitors** button again.

See also:

[*Managing filters*](189) 189

4.3 Visitors' actions

Sales-n-Stats system defines and registers visitors' activity at your site as a number of certain actions for example, login, registration, add to cart, etc. All actions can be divided into two types according to the way of delivering information:

1. **Pattern driven actions** are identified by the system according to the URL pattern. For example, an action 'Viewing a Catalog' (view page A) is recognized when a visitor opens the site page that contains any catalog page in the web browser. The action results in viewing a single page that matches the pattern of this action. See more about action patterns in the <u>'Setting up action patterns'</u> 159 chapter.

2. **External actions** is another way of defining actions using Sales-n-Stats API. Instead of analyzing page views and matching them to patterns Sales-n-Stats receives information about actions from your web application through the special interface.

External actions are usually generated by a special piece of software (Sales-n-Stats integrator) that is installed into your compatible application like shopping cart, CMS software, etc. If you are using software for which no integration is currently available you can write your own integration module using integration toolkit bundled with the software.

Before you start defining the actions in the system think over what the visitors can do at your site, what actions are essential for your business, how knowing most frequently occurring actions benefits you. The next step is to work out the list of actions you want the system to register.

The following hints help you to define the list of actions specific for your business:

1. There are some main actions specific for your site, for example placing an order, subscribing for services, downloading booklet or demo, joining the program, etc.

2. Other actions show that your assistance is required, for example staying at the site for a long time, placing expensive products in cart but not heading to checkout.

3. There are also actions that help you gather personal information about the potential clients and thus get to know more about their needs, for example using site search facility, adding products to cart or wish list, voting and filling surveys.

4. Some actions serve as basis for generating reports, for example 'processing an online order' action supplies information to the 'Sales dynamics' report.

The Sales-n-Stats system is shipped with the preconfigured settings that can be easily loaded into the system. But if your business is unique you should be very creative when classifying visitors' actions specific for your business.

See also:

[*Setting up action patterns*](159) 159

[*System reactions*](81) 81

4.4 System reactions

As soon as the action is recognized by the Sales-n-Stats system various automated system reactions can be triggered in response. Thus some typical situations at your site can be processed without human interference.

For example:

1. Notify customer that his order will be delivered only tomorrow because shipper's truck departed late.

2. Alert operator that customer with $1000 worth goods in his shopping cart is heading to checkout.

3. Offer a visitor a small discount for the product (e.g. send a discount coupon) if he spends some time on its description page to help him make a decision.

Setting up action-reaction pair can save your time and efforts when you add new active features to your website.

Adjust the system reactions for each action via **Main Menu->Tools->System settings->Actions->Reactions.** For more information refer to the 'Setting up action patterns' 175 chapter.

4.5 Visitor's Badge configuration

A Visitor's Badge is a visual representation of a site visitor in Sales-n-Stats Operator Terminal that normally consists of some graphics and text. Badges appear within zone windows on the site monitor. To tell what any visitor who is currently on the site is doing find out what zone window his badge is in.

Badge structure

The contents of a Visitor's Badge can provide a lot of useful information about the visitor. As the goals pursued by different users of the Sales-n-Stats system in the process of monitoring may vary, we made the badge configurable so you have a free hand in deciding what information should be reflected on the badge and how it should be presented. A closer look at the structure of a Visitor's Badge can give you a better idea of how to use badges in your work.

A badge that you see on the 'Site Monitor' when somebody is visiting your site appears as an organized set of textual and graphical elements. These elements represent certain parameters characterizing the visitor and his interaction with the site. Textual elements can reflect names, IP addresses, URL addresses, product titles, etc. Graphical elements - icons, markers, tokens and indicators - can represent visitor properties symbolically (for example, if your visitors are divided into several groups, the look of the main icon can tell you the group to which the visitor belongs; the colors on the Zone Tracking Bar can show you how the visitor moved through your site, etc).

The elements from which a badge is assembled are not added to it sporadically: every badge consists of slots which can accommodate elements reflecting data of just one specific type. Some badge slots are reserved for preconfigured elements, for example, the Chat Marker. However, in the majority of cases you can define what elements should appear in this or that slot, when this should happen and what data should be symbolized by these elements.

The configuration of the Visitor's Badge is defined in the Sales-n-Stats system settings (**Main Menu ->Tools -> System settings -> Visitor->Badge Setup**). Before you set up your own rules regulating what data should appear in what badge slot and in what form, the badges appearing on the monitor in your Web control and communication center are formed according to Sales-n-Stats default settings. These settings can be readjusted at any time (Please refer to the chapter ['Setting up the visitor's badge'](#) [206] for more information).

These are the main components used in a visitor's badge:
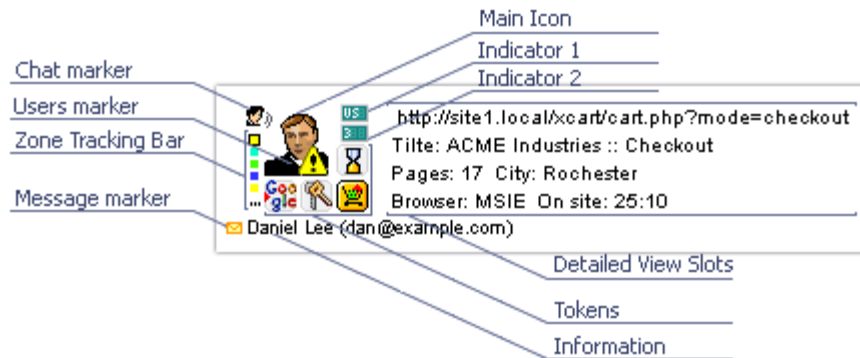
Badge components.

Besides these main components there is a set of non-editable Status icons (elements inserted into visitor badges on the system level to inform you of a temporary visitor status) and eight textual slots of the Detailed View information section (visible only in the Detailed badge; See 'Compact and Detailed badge view' 87 further in this chapter).

Main Icon

The 'Main Icon' slot of a visitor's badge is meant for relatively large icons to determine what kind of visitor you are dealing with.

Here is the list of default icons in order of priority.

 - the visitor's order total is more than $1000.

 - the visitor has placed orders at your site.

 - the visitor has somehow defined his first name (he could have registered or submitted an online form).

 - no information about the visitor is available.

Indicators

Two slots in a visitor's badge are meant for Indicators. The look and functions of the two Indicators are identical: they are small green panels at the top right of the main icon which can display textual or numeric

values. Indicator 1 defaults to the visitor's country determined by his IP address, and Indicator 2 to the total number of visits.

Tokens

The badge slot for Tokens is in fact a group of four subslots clustered together. Each of these subslots can accommodate a Token - a small icon (16 x 16 px) symbolizing a certain visitor property. A token is displayed on the Visitor's Badge if the corresponding condition is met.

Here is the default list of tokens in order of priority.

1. - the visitor refused to communicate.

2. - communicated with operator.

3. - has products in shopping cart.

4. - logged in.

5. - made a site search.

6. - came from Google.

7. - came from Yahoo!

8. - came from MSN Search.

9. - stays more than 25 minutes.

10. - first visit.

11. - visitor's OS is Windows.

12. - visitor's OS is Macos.

13. - visitor's OS is Linux.

Information

The slot below the Main Icon and the Tokens is used by default to display the visitor's first and last name or IP address and email.

Messages Marker

The slot in the bottom left corner of a badge can tell you whether the visitor represented by this badge has any unclosed messages. If there are unclosed messages, a small envelope icon appears in this slot. If all the user's messages are closed, the 'Messages Marker' badge slot is empty.

Chat Marker

The slot at the top left of the Main Icon is meant for the Chat Marker. The Chat Marker icon gets displayed only when the visitor has an open communication session.

User's Marker

One slot in a badge is meant for a User's Marker. It is a sign which can denote whatever you want it to. It appears over the Main Icon. The visitor does not know he has been marked, but the mark sticks to his badge as long as you want it to be there and will appear on the visitor's badge during his/her next visit as well. You can use the set of markers provided with Sales-n-Stats (your own tooltips to them if necessary) or add your own icons (GIF, 16 x 16 px) to be used as markers.

Here is a list of available User's Markers with default tooltips:

⚠ - "Attention"   ✋ - "Hand"

😠 - "Angry"   ⓞⓚ - "All correct"

😄 - "Smiley"   ❓ - "Question"

✅ - "Green Tick"   🚫 - "Stop"

To mark a visitor, right-click on his badge, select **Mark** from the context menu and select an icon from the list.
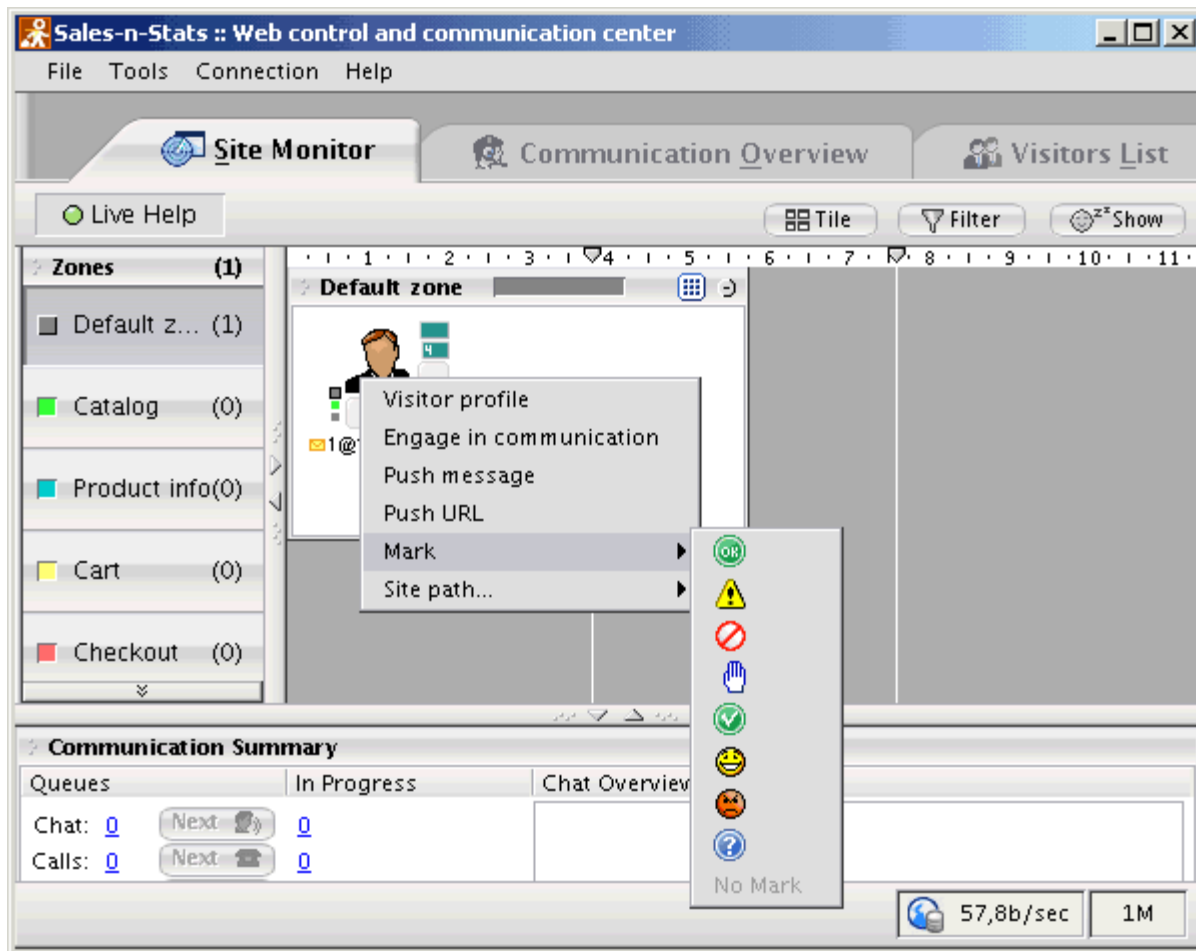
Selecting a marker for a visitor's badge.

The selected mark is added to the visitor's Main Icon. To remove a mark right-click on the visitor's badge and select **Mark -> No mark** from the context menu.

Zone Tracking Bar

The slot to the left of the Main Icon is meant for the Zone Tracking Bar which is a vertical row of tiny colored squares.

Each square in the row symbolizes a zone of your site that the user has visited recently. The color of the top square corresponds to the zone which the user is currently in. The order of the squares shows the history of the user's movements between the zones before he reached his current location. As the visitor moves about the site the look of the Zone Tracking Bar changes: the zones visited the most recently appear at the top of the bar, while the others are moved away towards the bottom until they are forced out of the bar. The Zone Tracking Bar tooltip, however, allows you to see all the visited zones, including the ones which are no more visible in the bar itself. The Zone Tracking Bar and the tooltip for it are not editable – the system builds them dynamically on

the basis of the zones you set up in your Sales-n-Stats.

Status Icons

There is a group of non-editable elements called **Status Icons** which do not literally belong to the visitor's badge but may appear on top of a badge to demonstrate temporary visitor statuses. The icons of this type get displayed in the top left corner of the badge.

- This element appears on the badge when the visitor goes to a page that belongs to another site zone. The arrow symbolizes movement, the color of the square corresponds to the color of the zone to which the visitor is moving (zone color is visible in the color bar of a zone window title bar). As this icon is displayed, the badge fades gradually and finally disappears from the zone re-appearing in another zone window.

- This element gets displayed on the badge if the visitor is inactive for a period of time specified in **Main Menu ->Tools -> System settings -> General settings -> General -> Activity timeout** (Sales-n-Stats tracker periodically sends signals from the visitor's browser to Sales-n-Stats Data Collector so the system 'knows' that a visitor is on the site. If Data Collector does not receive a signal from a visitor for a certain period of time, it is interpreted as inactivity). As this icon is displayed, the badge fades and disappears. It means that the visitor has left your site for another place on the Web or gone to work in another application on his computer. If the visitor returns to the site, his badge re-appears.

- This element appears on the badge after the visitor has been staying at the same page of your site for a period of time specified in **Main Menu->Tools -> System settings -> General settings -> General -> Sleep timeout** (This situation is possible if Data Collector keeps getting signals from the visitor's browser, but the visitor is not moving anywhere). The icon disappears when the visitor goes to another page.

Compact and Detailed badge view

A visitor's badge has **Compact** and **Detailed View**. Compact View consists of the main badge components: the Main Icon, two Indicators, the Token group, the Zone Tracking Bar, the 'Messages', 'Chat' and 'Users' markers and the 'Information' section. Detailed View is an extended version of the badge, containing the whole of the 'Compact badge' and eight more slots which constitute the 'Detailed View information' section.
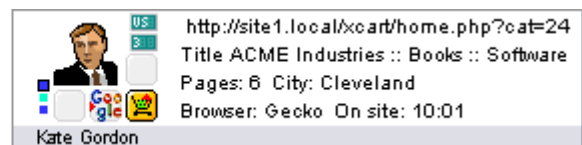
Compact view.   Detailed view.

To switch between Compact and Detailed View for the badges located within a specific zone window click the Compact/Detailed View switch on the zone window title bar: click on ⊞ to see detailed badges, click on ▤ to make the badges compact. As compact badges take less space, switch to Compact View when a zone is overcrowded with visitors.

The slots of the Detailed View information section are meant for textual or numeric information reflecting the current state of the visitor. By default the Detailed View section contains the following information:

1. The URL of the page he is currently viewing

2. The title of the page he is currently viewing

3. Pages viewed in this visit

4. City determined by IP address

5. Browser type

6. Time spent on site

There are two more slots which are empty in the Detailed View section by default. A header can be defined for each of the eight slots. The values of the Detailed View information slots are displayed all the time while the Detailed View mode is on. The contents of the Detailed View information slots and the tooltips for them can be set via Sales-n-Stats system settings **(Main Menu ->Tools -> System settings -> Visitor -> Badge Setup -> Detailed View Setup).**

See also:

4.6 Communication

There is a set of communication tools built in the Sales-n-Stats system that provides you with 3 different ways of communication: Text messages, Text chat, and Voice calls. Both an operator and a visitor can choose the most appropriate way of communication.

To facilitate the communication process and save your time use the 'canned' messages that can be the typical answers, greetings, good-bye messages etc. Categorize such phrases according to the usage situation for fast access during the communication process. Please refer to the chapter <u>'Using 'canned' messages'</u> 117 to find out what a 'canned' message is, how the operator can access his 'canned' messages, add, delete and edit them.

Selecting the Voice over IP (VoIP) technology you not only save money on long distance calls but also achieve deeper interaction with the visitors. Use the <u>'Push' functionality</u> 123 to direct a visitor to the specific URL, show him an image or send a file directly via the visitor's browser.

An operator can communicate with the visitors offline by handling the messages left by the visitors. Please refer to the chapter <u>'Handling visitors' messages'</u> 116 to find out how the operator gets to know he has new messages to answer, where a visitor's message can be viewed, how the operator can create a message and send it to the email address of a specific visitor, how the operator can search for specific messages in the visitor's communication history.

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See also:

   <u>Offline Communication</u> 115

   <u>Live Communication</u> 104

4.7 Connection status

A connection status indicator icon in the status bar of the Web control and communication center (at the bottom of the screen) allows you to see the status of connection between Data Center and Data Collector, and, if necessary, to change the connection status.

Normally the status bar displays one of the following icons:

 means Data Collector is currently connected to Data Center and is working properly. The tooltip displayed on mouse-over allows you to see the URL of your Sales-n-Stats Data Collector.

 means Data Center succeeded in connecting to Data Collector, but Data Collector itself is not functioning correctly. The most likely reasons would be a PHP error in Data Collector or problems with the Database used by Data Collector.

 means Data Collector is not connected to Data Center. This icon appears if Data Center failed to connect to Data Collector and you chose to work offline, or if you stopped the connection manually.

If the icon is blinking, it means the system is in the process of fetching non-recent stream. It is a process in which Data Center receives from Data Collector the information about the visits to the site which took place while Data Center was not connected to Data Collector (for example, while your Web control and communication center was turned off). Until the process of fetching non-recent stream is complete the information in database may not be full.
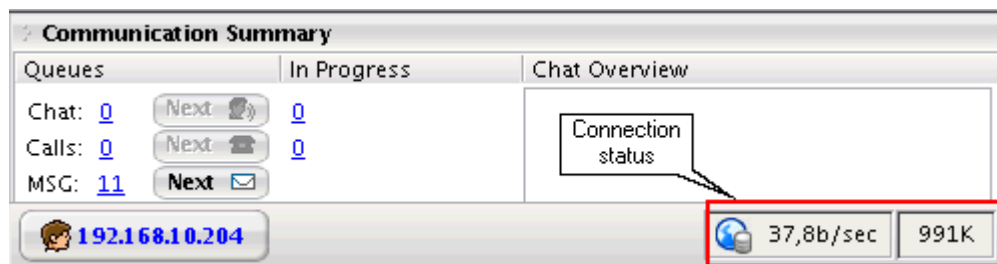
The 'Connection Status' section.

Essential information about the traffic between Data Collector and Data Center can be seen next to the icon: the value in the first pane shows the current bandwidth between Data Collector and Data Center, the value in the other one demonstrates your inbound traffic for the last 24 hours.

To change the connection status, right-click on the icon and select either **Start connection** or **Stop connection** from the context menu. Selecting **Traffic details** from the context menu opens the **Data Collector -> Traffic monitoring** section of the 'System settings' section allowing you to see your traffic details.
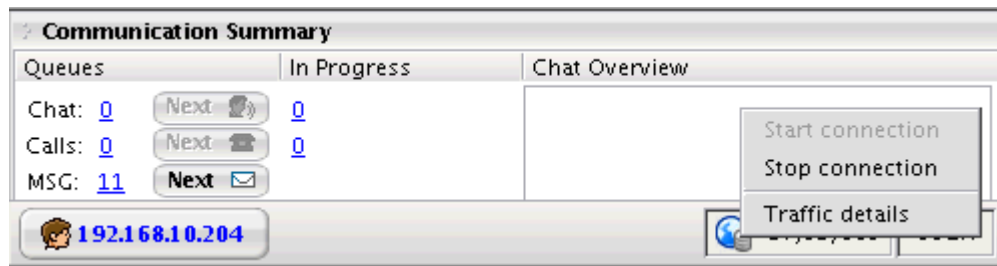
Changing the connection status from the context menu.

5. Working with visitors' personal data

This section provides detailed description of the Visitors List and Visitor's Profile.

- Read 'Managing the Visitors List' 93 section to learn about what kind of information is stored in it, how to apply sorting patterns and search for visitors.

- Study the 'Managing the Visitor's Profile' 96 chapter for general information about the data in the Visitor's Profile.

5.1 Managing the Visitors List

The Visitors list represents a way of keeping ordered information about all the visitors who have ever visited your site. Each list entry corresponds to an individual visitor and provides some personal visitor information captured by the system in the process of the visitor's interaction with the site being monitored. The list can be accessed by clicking on the 'Visitors list' tab of the Web control and communication center interface.

Visitors List Fields

The contents of the Visitors List is organized into a table with personal information of each visitor divided into several sections:

- **IP/Country/City** – the IP address of the machine used by the visitor to access the monitored site, and the name of the visitor's country of origin if it can be defined based on the visitor's IP address;

- **Name**

- **Email**

- **Last visit** – the date of the user's last visit, or his current status ('Online');

- **Visits** – the total number of the user's visits to the site (In fact, the number of closed visits. A visit starts the moment the visitor gets onto any of the site pages and expires after 30 minutes of the visitor's browser inactivity – for example, if the visitor browses off to another site on the Internet);

- **Visitor ID** – the unique ID which is automatically assigned to the visitor by Sales-n-Stats the moment the visitor first gets onto the site and is normally stored in his "personalize_client_id" cookie.
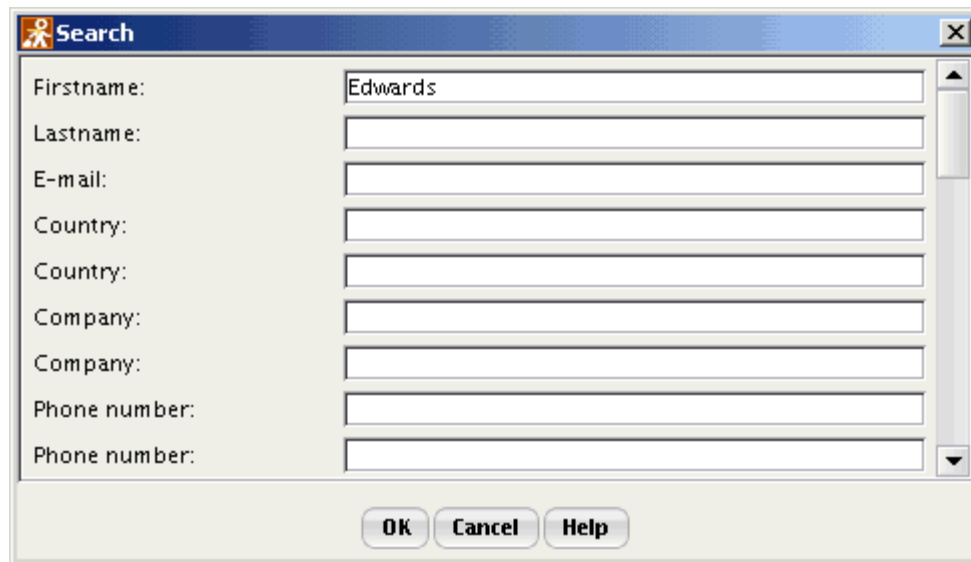
Sorting Visitors

For your convenience the Visitors List may be sorted in one of the following ways. By default the visitors are sorted by the date of their last visit. To sort by IP/Country/City, name, email, number of visits and visitor ID of the visitors click on the appropriate column header. For example, to sort the visitors by name click on the 'Name' column header. A downward arrow is displayed in the header and the visitors names are sorted in the descending order. Click on the column header again to reverse the sorting order.

Searching for a visitor

Sales-n-Stats allows you to search for any visitor from the list. The system searches for substrings according to the information about the visitors you entered into the corresponding fields. For example, a substring search for first name "Jo" would return all the first names containing this letter combination - "Joe", "John", "Joanne"). To search for a visitor:

1. Click on the **Search** button at the top of the 'Visitors List' section. The 'Search' form appears. The search form fields are defined by the order of the profile fields in the Visitor's profile **via Main Menu->Tools->System settings->Visitor->Visitor's Profile.**

2. Provide the necessary search criteria by filling in the corresponding fields in the 'Search' form.

For example, to search for all the visitors whose last name is Edwards,
enter Edwards into the field 'Lastname' and leave the rest as is.

3. Click **OK** to start the search.

If you close the 'Search' window, click on the **Search Results** button at the top of the 'Visitors List' section to return to the search results. To return to the full list of your visitors, click **Full List** button.

Double-clicking on any entry in the Visitors List opens the profile of the corresponding visitor in the 'Profile' tab. While the Visitor's Profile is open, the visitor's name and email address, or the visitor's IP are displayed in the status bar at the bottom of the page.

5.2 Managing the Visitor's Profile

'Visitor's Profile' dialog

Full access to the profile information of a visitor can be gained via the 'Visitor's Profile' dialog. The 'Visitor's Profile' dialog can be opened from a number of places on Sales-n-Stats web control and communication center interface. For now the most convenient way to access detailed information about a visitor would be to open his profile from the 'Site Monitor' or from the 'Visitors List' sections (The difference is that from the 'Site Monitor' section only the profiles of the visitors currently browsing the site can be opened, while the 'Visitors List' allows you to open and view the profile of any visitor).

To view a Visitor's Profile from the 'Site Monitor' section, do one of the following:

1. Double-click on the badge of the visitor whose profile you want to open, or

2. Right-click on the badge and select 'View profile' from the pop-up menu that appears.

To view a Visitor's Profile from the 'Visitors List' section, double-click on the list entry corresponding to the visitor whose profile you want to view.

To access the necessary Visitor's profile via some of the preconfigured reports 130 double-click on any of the visitors' data (ID, email, name, etc.) presented in the reports. That gets you over to the 'Profile' section of the Visitor's profile which provides personal information captured by the system in the process of the visitor's interaction with the site being monitored.

The 'Visitor's Profile' window includes 3 sections: Profile, Live Communication, Messages. To access these sections click on the corresponding tabs at the top of the dialog.

Note: After you open a Visitor's Profile, the visitor's badge corresponding to it becomes framed.

Profile

Personal information is presented in the first of the three sections – 'Profile'. The 'Profile' section comprises four distinct areas: Visits, Actions, Visitor's profile, Visitor's badge.

'Visitor profile' dialog: 'Profile' section.

Visits

'Visits' area shows the history of all the user's visits to your site. A visit is series of pageviews, separated by a time period shorter than 30 minutes. The visits are listed chronologically (the earliest appears first) and you can see the date and time, as well as the duration of each visit. To view the path taken by the visitor through your site during any visit, click the [...] button opposite the appropriate visit. If some data do not fit in the columns, they get truncated. To view full URL, title, etc. move the mouse over the corresponding line.

'Visit Site Path' dialog.

To view visitor related information according to a certain visit, select this visit in the 'Visits' area. The contents of the visitor's badge, the list of actions in the 'Actions' area and the values of the profile fields displayed in the 'Visitor's profile' area are updated (at any moment in time these areas reflect the state of the visitor's data according to the end of the selected visit). It allows you to keep up with the history of data changes.

Actions

'Actions' area lists the actions which the visitor whose profile you are viewing has performed on the site monitored by Sales-n-Stats. An 'action' is a fragment of the visitor's interaction with the site which may consist of one or more steps but is recognized by the system as a logically finished act. Actions are singled out on the basis of what steps or step sequences taken by a visitor are relevant for your business. For example, typical actions for an e-commerce site may be a visitor's registration on the site, adding a product to the shopping cart, checkout, etc.

If you are using Sales-n-Stats to monitor an e-commerce site, and Sales-n-Stats has been integrated into the site with the help of a special module (as in the case of integration with **X-Cart** or **LiteCommerce** based stores), Sales-n-Stats employs a standard set of e-commerce-specific action patterns defined by the integration module. If for some reason you cannot use a special integration module or want to extend the standard set of action patterns, define the patterns relevant to your site by yourself (**Main Menu -> Tools -> System settings -> Actions -> New action**).

Each action name appearing in the 'Actions' area signifies that the visitor whose profile you are viewing now has done something that is defined in Sales-n-Stats as an action (the action name appearing in the 'Actions' area corresponds to the appropriate action defined by the integration module or set up manually in Sales-n-Stats system settings). There are the date and time of every action next to its name.

Adjust the 'Actions' area to display all the visitor's actions or only the actions pertaining to the visit that is currently selected in the 'Visits' area. To view only the actions of the selected visit, select the 'Only for selected visit' check box above the 'Actions' list. The actions pertaining to the other visits are automatically removed from the list. To view all the actions in the same list again, clear the 'Only for selected visit' check box. In this case the actions pertaining to the selected visit are marked blue.

In Sales-n-Stats, actions may be characterized by certain parameters. The parameters by which an action is characterized are defined during action setup (**Main Menu -> Tools -> System settings -> Actions -> <Some action> -> Action fields**). For example, you can adjust the system settings so that the action of login to your site is characterized by the billing first name, billing last name, email address and other parameters with which the visitor logs in. See 'Defining action fields' [165] section for details.

'Visitor profile' dialog, 'Profile' section: 'Add to cart' action parameters can be seen
('Category name' – name of the category from which a product was added to cart, 'Product name' - name of the product added to cart, 'Product ID' – ID of the product added to cart).

Visitor's profile

'Visitor's profile' area displays the personal data of the visitor whose profile you are viewing. Personal data presented here cannot be modified by the visitor, they are collected in the process of the visitor's interaction with the site. Every piece of collected personal information is stored to a separate profile field. Accordingly, each piece of the visitor's personal data is presented in the 'Visitor's profile' area on a separate line and consists of two elements: a profile field name and a profile field value.

You control what kind of information is stored and displayed in the Visitor's profile. Sales-n-Stats provides some predefined profile fields which can not be deleted. They are called "system" fields. If you do not need any of the information stored in the system profile fields, make these fields invisible in the 'Visitor's profile' area. Apart from these system fields, you can create your own ('custom') profile fields, which can also be made visible or invisible in the 'Visitor's profile' area. The values of custom profile fields are extracted from corresponding fields of the actions recognized by Sales-n-Stats.
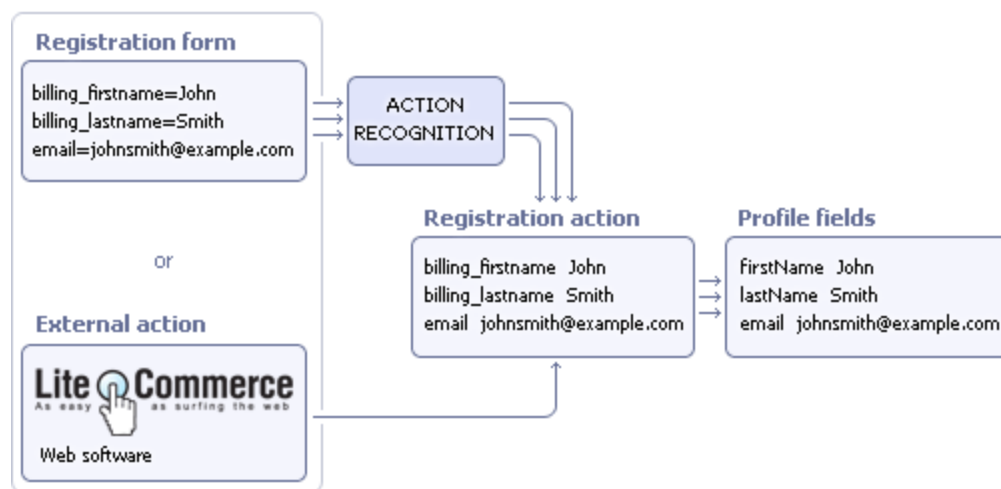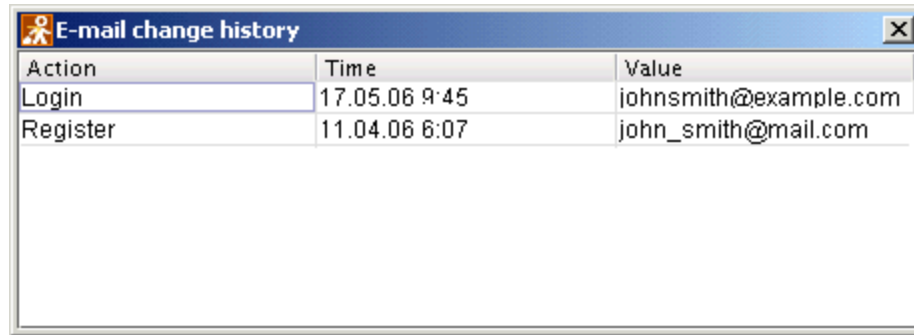

Data flow from a website to a visitor's profile

You define whether the values of the profile fields visible in the 'Visitor's profile' area should be saved for every visit or not. If you choose the latter, you will be able to find out the final value of a field for any visit. If you decide not to store this information, the 'Visitor's profile' area always show the most up-to-date information about the visitor irrespective of the selected visit.

Visitor's Profile fields can be set up via the corresponding section of the Sales-n-Stats system settings dialog **(Main Menu -> Tools -> System settings -> Visitor -> Visitor's Profile)**.

You define where the information that gets recorded to specific profile fields is taken from. Basically, the only thing you need to know is that each value is entered into profile field as a result of a certain action of the visitor. Custom profile fields need to be adjusted to receive data from proper action fields (It is done manually via **Main**

Menu -> Tools -> System settings -> Actions -> <Some action> -> Action fields -> Store in profile field.

The information in a profile field gets updated every time the visitor performs an action with parameters affecting this field. To view the history of changes of any profile field value click on the ⊡ button next to the appropriate profile field in the 'Visitor's profile' area.

'Email change history' dialog.

The following system profile fields are included into the 'Visitor's profile' area by default:

- **Firstname**

- **Lastname**

- **Email**

- **Country**

- **Company**

- **Phone number**

- **Fax number**

- **Street address**

- **City**

- **State**

- **Zipcode**

- **Search Phrase** (Last phrase used by the visitor to search for something on the site)

- **First visit** (Date and time of the visitor's first appearance at the site)

- **Last visit** (Date and time when the visitor was last seen at the site)

- **Last page viewed**

- **Referrer** (URL of the page from which the visitor was referred to the site)

- **IP address**

- **Country by IP** (Visitor's country of origin according to his IP address)

- **City by IP** (Visitor's city of origin according to his IP address)

- **State by IP** (Visitor's state of origin according to his IP address)

- **User's browser**

- **hasUnclosedMessages** (Flag stating whether the visitor has unclosed messages or not)

Visitor's Badge

The visitor's badge in the 'Profile' section represents a schematic depiction of the visitor's status at the end of the visit that is selected in the 'Visits' area.

Live Communication

For detailed information about the 'Live Communication' tab read <u>Communication -> Live Communication</u> [104] section.

Messages

The 'Messages' tab is described in full in <u>Communication -> Offline Communication</u> [115] section.

See also:

6. Communication

This chapter provides information about different ways of communication between site visitors and Sales-n-Stats operators.

- To learn more about text and voice chats refer to <u>Live Communication</u> [104] section.

- Find out how to send a link, a file or an image directly to the visitor's browser in the <u>'Using 'Push' functionality'</u> [123] section.

- Read <u>'Handling multiple visitors'</u> [112] section to learn about queuing visitors and leading multiple chat sessions at the same time.

- Consult <u>'Offline Communication'</u> [115] section for more information about sending email messages to the visitors, using 'canned' messages and searching the communication history.

See also:

<u>Offline Communication</u> [115]

<u>Live Communication</u> [104]

6.1 Live Communication

Many of your website visitors are your potential clients, so a positive first impression is essential. If the visitors see they can chat with an operator right from your website, they know you will be there to assist them when needed. All they need to do to start a conversation with you is to click on the **Click for Live Help** button on your website.

Adjust your communication status right from the Web control and communication center by clicking on the **Live Help** button located at the top left of any of the four major sections ('Site Monitor', 'Communication Overview', 'Visitors List', or 'Reports'). Click the **Live Help** button to enable your visitors to contact you and ask for assistance. To change your communication status via **Main Menu->Connection** select either **Live Help Available** or **Live Help Not Available** from the drop-down list.

After clicking on the **Click for Live Help** button a visitor can select either a text or a voice chat.

Note: The visitors do not need to install or download any additional software to communicate with the operator except that for the voice chat.

After the visitor has chosen a communication mode, the operator sees the 'Incoming chat request' dialog.


'Incoming chat request' dialog

To start a chat session with the visitor, click **Accept**; the Visitor's profile is opened in the 'Live Communication' tab.

If you don't want to communicate with the visitor, click **Decline**.

If you cannot talk to a visitor right now, click **Queue**; the system directs this visitor to the 'Communication Queue' section. Do not forget about those visitors you put in the queue, as there will be no second notification! For details see 'Queuing visitors' 112 section.

Text chat

If a visitor selects the **Text Chat**, he sees a progress bar in the 'Routing your call…' window till you accept the call. If you are available for communication the chat window opens at the visitor's front end and a visitor can start communication.
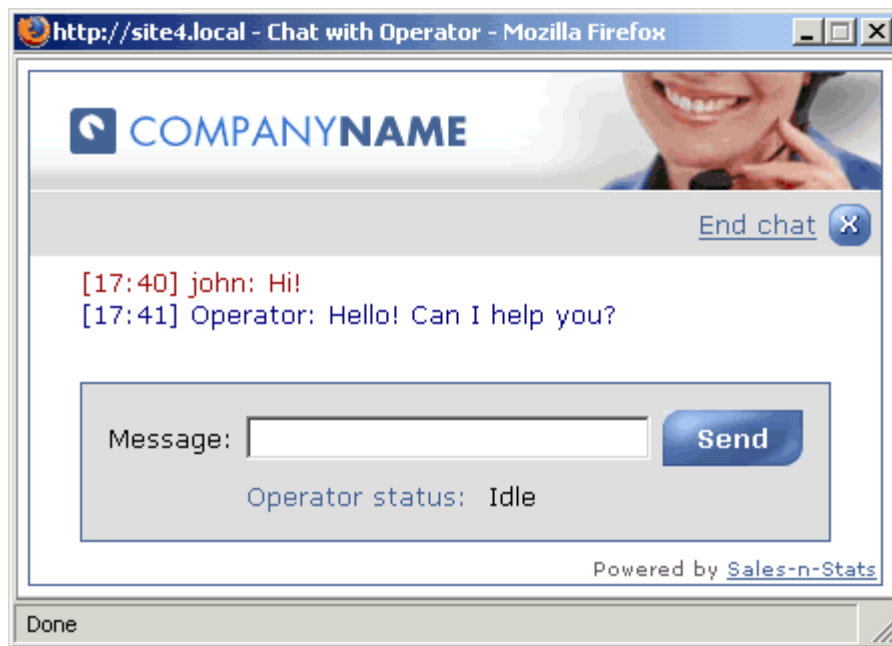
'Chat with operator' dialog: starting communication

After the visitor has started communication, you see the chat text in the 'Live Communication' tab of the visitor profile and can send the replies. Just enter the text into the lower part of the window and click **Send**. You can also enter URLs or email addresses - they will become clickable links on the visitor's end.
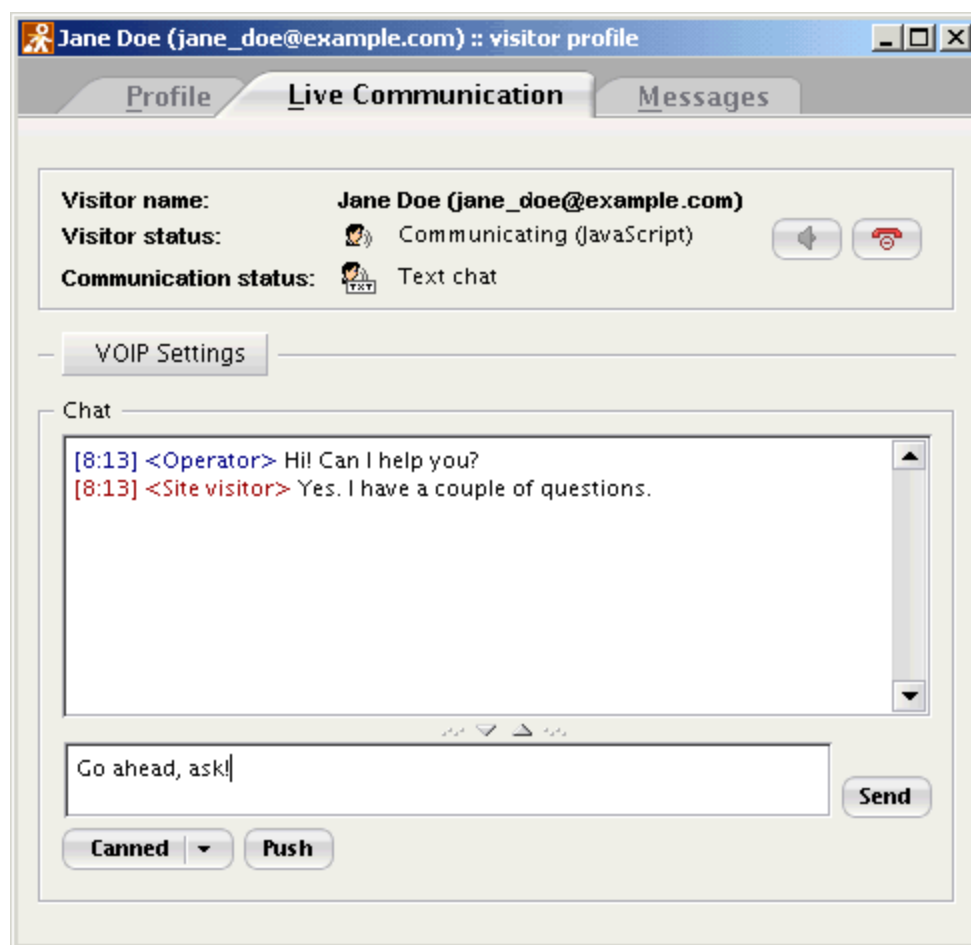
'Chat with operator' dialog: operator's end.

If you cannot accept the chat at the moment a visitor who sent it gets a notification that the operator is busy and the call has been queued. If a visitor does not want to wait, he can leave a message for the operator by clicking on the 'Leave a message' link.

'Call queued' dialog

Voice chat

If a visitor selects **Voice Chat**, a warning message opens in a separate window suggesting to wait until the software required for voice chat is downloaded. If the visitor selects **Yes** he sees a progress bar in the 'Loading voice chat applet' window. The process should take just a couple of minutes.

When the voice chat applet is downloaded a visitor sees the 'Routing your call' dialog and should wait till you accept the call. Then a chat window opens and a visitor can start communication.

If a visitor does not want to download the voice chat software, he can close the 'Loading voice chat applet' window. To start a text chat he should click on the **'Click for Live Help'** button once again and select the **Text Chat** button. Please refer to the section 'Leading several chat sessions at a time' for more information about live communication process.

If the voice chat applet can not be downloaded, to switch to Java, or ActiveX applet (depending on the browser you are using) click on the appropriate link below.

Starting communication with a visitor

1. Do one of the following:

- Open the Visitor's profile by double-clicking on the visitor's badge. Select 'Live Communication' tab and click on the [ ] button.

- Right-click on a visitor's badge, select **Engage in communication** from the context menu. The Visitor's profile is opened in the 'Live Communication' tab. A message dialog allowing you to start communication with the visitor appears automatically.

2. Create a chat invitation by entering some text into the dialog message text box. There is a default invitation stored in the system: "Hello! I'm %name%. If you have any questions or requests I'm ready to help you. Just click "Start Chat" button to start a conversation." The default invitation contains a variable **%name%.** It is the operator's name which you specify via **Tools->System settings->General->Operator name**.

You can leave the default invitation as is, type your message manually or select a 'canned' message by clicking the **Canned** button (If there are no 'canned' messages, you can create some. Refer to the 'Using 'canned' messages' section of the 'Offline Communication' 118 chapter for details).

3. Click **Send**. The visitor should receive the invitation in the form of an incoming chat request.

An invitation for communication opens in the visitor's browser.

If a visitor wants to accept the chat invitation, he should click the **Start Chat** button. If he does not want to answer it, he may close the window by clicking the close control at the top right.

After the **Start Chat** button has been pressed, the dialog 'Open chat with operator' opens. The visitor should use this dialog to enter his chat name (optional) and to select the type of communication (**Text chat** or **Voice chat**).

If, while speaking with a visitor, you receive another chat request, you can put the current chat session on hold and attend to the new visitor requesting assistance.

To put a chat session on hold, click the button in the 'Live Communication' section. The visitor receives a notification saying that the operator has suspended the chat. The **Send** button disappears from the communication dialog and remains disabled until you resume the chat. This prevents the visitor from sending more messages while your attention is diverted.

The chat may be ended by either of the two parties involved in it. To end a chat, click the ('End communication') button in the 'Live Communication' section. The visitor on his side can click **End chat** button located at the top right of the chat window.

After a chat is ended, both the visitor and the operator are able to order the chat transcript to be sent to a chosen email address. The operator can specify the necessary email address by selecting one from the 'Send chat transcript' drop-down box.
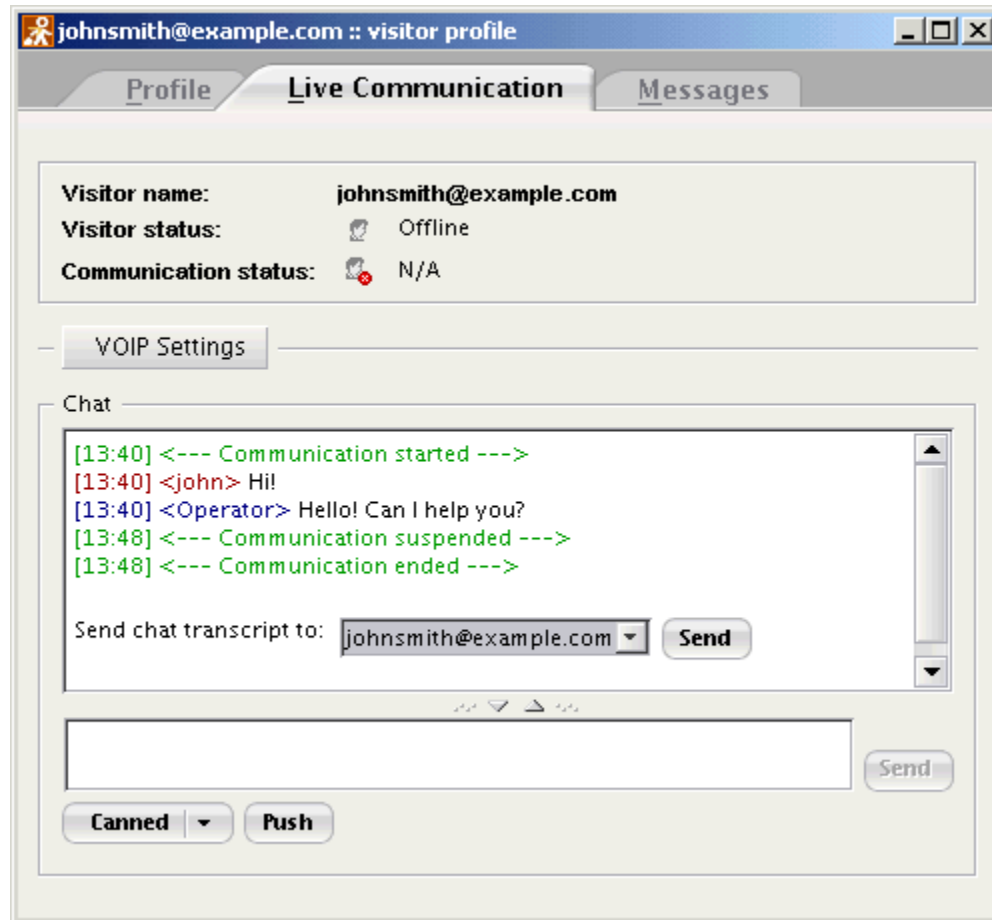
'Live Communication' section: sending the chat transcript.

The visitor has to enter the email address manually. Clicking on the **Send** button mails the transcript to the specified address.

Note: You have to define the mail parameters via **System settings->General settings->Network parameters** for a visitor to see the 'Mail me this chat transcript' field in the 'Chat with operator' dialog.

To initiate a voice chat click on the button in the 'Live Communication' section of the Visitor's profile.

Select **VoIP Settings** to:

- adjust the volume of both the operator's phone and the visitor's microphone, if the visitor cannot do it himself;

- take notes during the voice chat if necessary.

You can lead a voice and a text chat simultaneously (Text messages are seen in the 'Chat' section as usual).

Clicking the **'End communication'** button ends both the text and voice chat.

See also:

Communication 89

Using 'Push' functionality 123

Handling multiple visitors 112

Offline Communication 115

6.1.1 Handling multiple visitors

Leading several chat sessions at a time

When you are available for live help you can lead several chat sessions simultaneously. The number of communication sessions can be defined via **Main Menu->Tools->System settings->General settings-> General->Maximum number of chats**.

Note: we recommend you keep 2-3 chat sessions per operator.

The visitors who are communicating with the operator at the moment are displayed in the section 'My Communication'. Double-clicking on the necessary visitor's badge in the list opens the Visitor's profile. The profile opens at the 'Live Communication' section.

To start a chat click on the [button] button. It can be either a text or a voice chat depending on what type of communication the visitor selected.

When you end a chat session, you are prompted to talk to the next visitor from the queue. The 'Incoming chat request' dialog opens and you can accept the chat, decline it or put a visitor in the queue again.

You can select a visitor from the queue in the 'Communication Queue' section to start a text or a voice chat yourself. You can also initiate communication with any visitor browsing the site at the moment from the 'Site Monitor' section.

Queuing visitors

If there are more visitors who want to communicate, Sales-n-Stats system queues them up in the 'Communication Overview' section. You can see how long each visitor in the queue has been waiting ('In Queue') as well as view his badge ('Badge') and communication status ('Status').
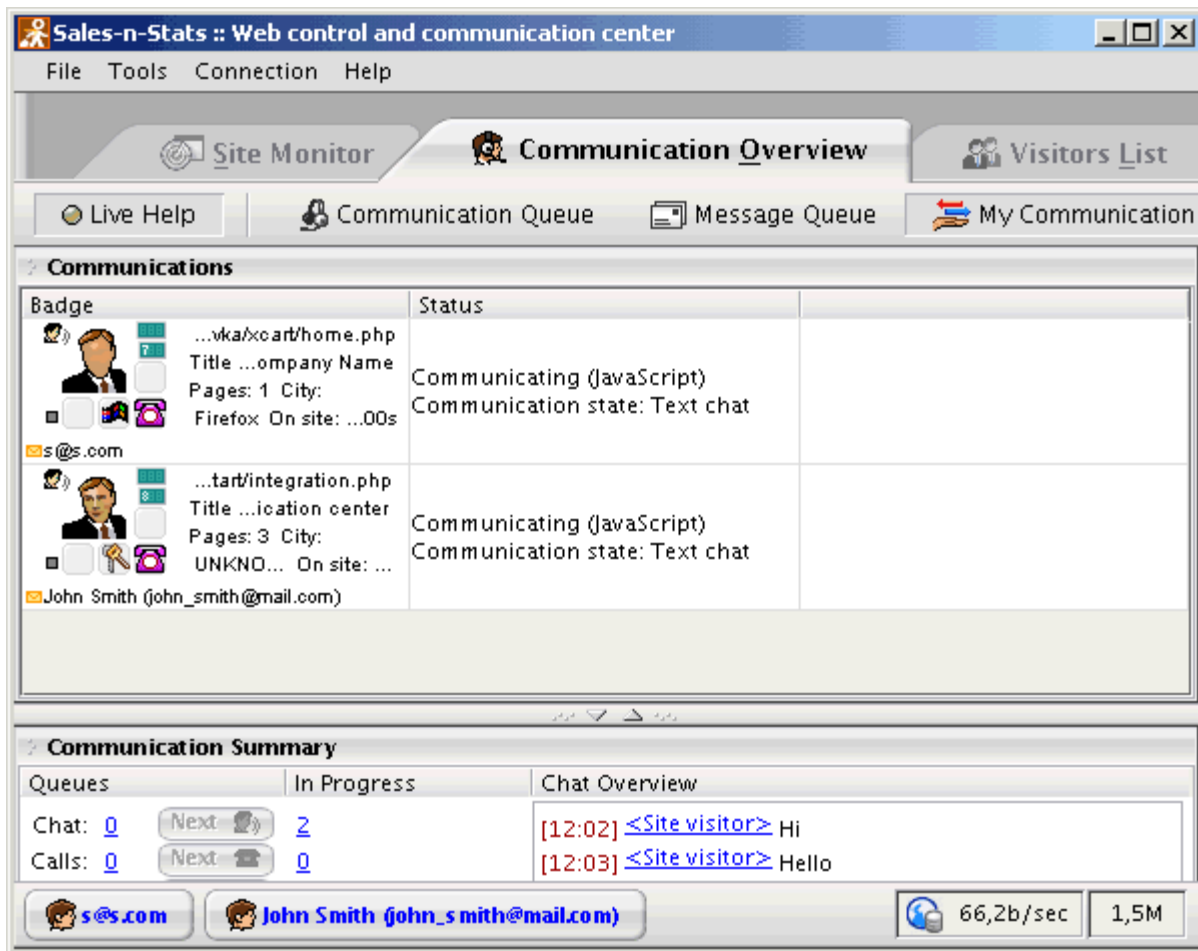
'Communication Queue' dialog: the visitors are waiting for communication with the operator

If no operator is available, a visitor can either wait in the queue or leave a message which you see in the 'Message Queue' section. To find more information refer to the 'Visitors' offline messages' section in the chapter 'Offline Communication' 115.

As soon as an operator is available, the system redirects the visitor who has been waiting longer than the others to 'My Communication' section. There can be only three visitors in 'My Communication' section at a time. You can communicate with all the three visitors simultaneously or communicate with just one visitor putting other chat sessions on hold.

Communication Summary

No matter what section of the Web control and communication center you may be in at the moment, you can keep an eye on the communication process with the help of the 'Communication Summary' panel located at the bottom of the screen. This panel shows how many chat sessions are in progress at the moment ('In Progress'), as well as how many messages, chats and calls are waiting to be answered ('Queues').

There are three **Next** buttons corresponding to chats, calls and messages. Clicking on a **Next** button opens the profile of the next visitor in the queue so the profile section 'Live Communication' is displayed. This section can be used to start communication with the visitor, answer a message posted by him or get detailed visitor information if necessary.

In the 'Chat overview' section you see the messages of all the communication sessions you are leading. Click on the '*Site visitor*' link to get to the 'Live Communication' tab of this Visitor's profile.
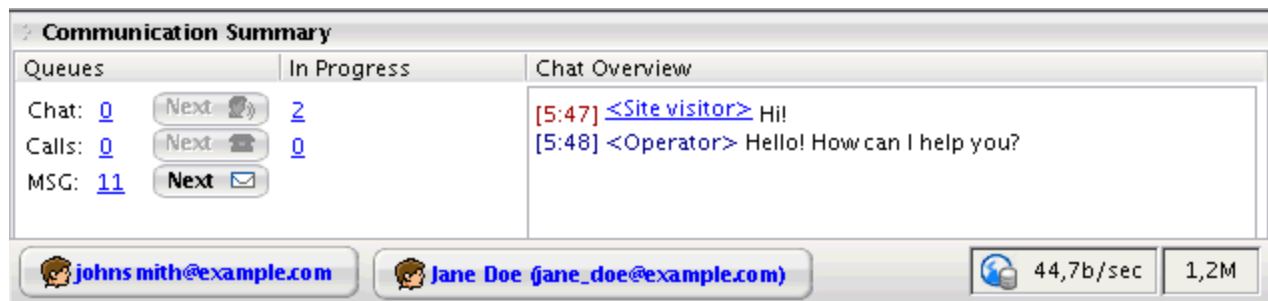
'Communication Summary' panel.

The 'Communication Summary' panel is displayed in the lower part of the screen and is visible from any section of the Web control and communication center. If necessary, it can be rolled up to a size of a small window displaying only the 'Queues' section. To minimize the panel, click on the downward arrow zoom button located on the splitter bar above the 'Communication Summary' panel.
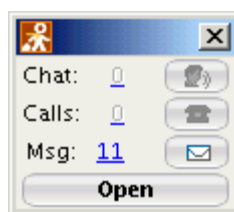
'Communication
summary' panel
(minimized view)

To bring the 'Communication Summary' panel back to its normal size, click **Open** or click the window 'close' control.

6.2 Offline Communication

Visitors' offline messages

Any customer can leave an offline message directly from the site that is monitored by Sales-n-Stats. A special button integrated into the site allows the site visitors to contact the customer service operator. Depending on the operator's availability, this button may say either **'Click for Live Help'** or **'Leave a message'**.

'Click for Live Help' means the operator is currently online and the visitor can invite him to chat by clicking on the button. However, if any other site visitors have requested live help at the same time and the operator cannot accept the invitation to chat at once, the visitor is asked either to wait or to leave a message. To leave a message he needs to click on the appropriate link ('leave a message') and complete a special form.

The **'Leave a message'** button means the operator is offline and clicking on the button will take the visitor directly to 'Leave a message' form.

Please note that the button changes from **'Click for Live Help'** to **'Leave a message'** not immediately after the operator goes offline. The delay is caused by the fact that Data Collector needs some time to "realize" that connection with Data Center has broken. Sales-n-Stats works so that Data Collector is supposed to periodically receive from Data Center a list of operators who are currently online. If an updated list is not received before the time period specified in the **'Operators list expiration (sec)'** option is exceeded, the system "understands" the operator has gone offline and changes the button to **'Leave a message'**.

If a visitor attempts to start a chat session with an operator while the button still says **'Click for Live Help'** but the operator is already offline, Sales-n-Stats tries to route the call to the operator, and when that does not work out, the visitor gets an invitation to wait or to leave a message.

To leave a message, the customer needs to complete and submit an online form. The form requires the visitor to enter the same information he would be asked to provide when sending an ordinary email (the name by which he wants to be addressed, the email address to which he wants the reply to be mailed, the subject of the message and the message text) and click **Send Message.**

'Leave a message' dialog filled by a visitor.

Handling visitors' messages

The operator finds out he has some new messages to answer by looking at the 'Communication Summary' panel (bottom left corner of the screen). There, in the 'Queues' section, the line that says 'MSG' shows the number of messages that need to be answered. Clicking on the number in this line opens the 'Message Queue' section of the Operator Terminal (an alternative way to access this section would be to click on the 'Communication Overview' tab and to select 'Message Queue' there). The 'Message Queue' displays all the messages received from the site visitors in one stream.

To reply to a message, the operator needs to open the 'Visitor's Profile' dialog of the visitor to whom he wants to answer.

Clicking on the email address in the header of the necessary message ('Message::Posted by Username (username@example.com)') opens the 'Visitor's Profile' of the visitor who posted the message (namely, the 'Messages' tab of the Visitor's Profile dialog). The central area of the 'Messages' tab (also called the 'Message board') displays the history of communication with the visitor, including his newest unanswered messages. Please note that the headers of the messages which have not been answered are colored light blue (the closed messages have grey headers).

To create a message that will be sent to the visitor, the operator needs to:

1. Use the 'Email' drop-down box to select the email address to which the message needs to be sent.

If the needed email is not in the list, select **<add email>**, enter the email into the input box that will appear and click **OK**. The new email address will be added to the list of the visitor's email addresses.

To send the message to all the available email addresses of the visitor, select **<all emails>**.

2. Enter the subject and the body of your message into the appropriate fields. If necessary, use a 'canned' message.

Selecting a 'canned' message.

3. Click **Send**. The message gets sent to the email addresses selected in the 'Email' box and gets added to the list of messages in the 'Message board'.

After the operator replies to a visitor's message, he should mark this message as 'closed' not to reply to it a second time. To close a message, the operator needs to select the check box in the message header (Notice that when a tick appears in the check box the color of the message header is changed from blue to grey.) The operation of closing a message is reversible: if necessary, you will be able to unclose any message by clearing the before-mentioned check box and confirming the operation.

If the operator does not want to send any email messages, but just wants to create a note for himself about the visitor whose profile is opened, he can take the same steps as in the process of creating an email message, but select **<don't send>** from the' Email' drop-down box. The note created in such a way will appear in the 'Message board' along with the other messages, but it will not be sent to the visitor.
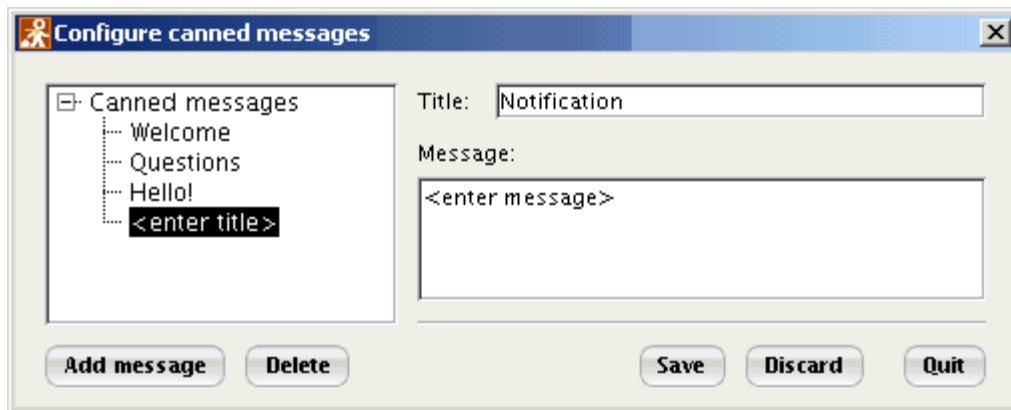
Using 'canned' messages

'Canned' messages are templates which can be used for creating messages. For example, if different site

visitors regularly ask you the same question, it is natural to store the answer to it somewhere on your system and then just cut and paste it into each new message sent in reply to that question. Of course, you can save these frequently used phrases and explanations in any file, but Sales-n-Stats provides a way in which such messages can be handled directly from the Web control and communication center, which is probably more convenient. You only have to enter each typical phrase once creating a 'canned' message, and then you get the ability to access it from any Visitor's profile. To substitute for the operator's name use **%name%** variable. In this case you will not have to change all your canned messages in case the operator name changes - it will change automatically when you edit it via **Tools->System Settings->General->Operator name**.

To add a 'canned' message

When you first install Sales-n-Stats, there are no 'canned' messages in it. To create a new 'canned' message, you need to do the following:

1. Click **Canned** in a Visitor's profile. A popup menu will appear (For the first time it will contain a single entry: <configure messages>).

2. Select <configure messages> from the menu. 'Configure canned messages' dialog will appear. The left side of the 'Configure canned messages' dialog displays the tree of your canned messages. The right side contains two fields (meant for entering the name and the body of a canned message, but inactive at the time you open the dialog.

3. Select the level of the message tree where you want to add a new 'canned' message or a new message folder.

4. If necessary, create a new folder for 'canned' messages:

   - Click **Add message**. A new branch named <enter title> will be added to the tree on the level you selected, the topic field (top right) will become active and will show <enter title> message as well.

   - Make sure the location of the folder being created is correct and enter a title for this new folder into the topic field instead of <enter title>. Click **Save**.

5. Create the message:

   - Click **Add message**. A new branch named <enter title> will be added to the tree on the level you selected, the topic field and the message field will become active.

   - Make sure the location of the message being created is correct and enter the title for this new message and the text into the appropriate fields on the right side of the dialog. Click **Save**.

'Configure canned messages' dialog: creating a 'canned' message.

Created 'canned' messages are added to the popup menu which appears when you click **Canned** button in the bottom left corner of the 'Messages' tab in a Visitor's profile. To insert a 'canned' message into a letter you are creating for a visitor, select the necessary 'canned' message title from there.

To delete a 'canned' message

Open the 'Configure canned messages' dialog, select the message you want to delete from the message tree and click **Delete.**

To edit a 'canned' message

Open the 'Configure canned messages' dialog, select the message you want to edit. It will be displayed in the right section of the dialog, edit the title and body of the message and click **Save**.

To export 'canned' messages

You can export your 'canned' messages to a text file. To do this select **Main Menu -> File -> Export settings** and clear all the check boxes except ''Canned' messages'. Your messages will be exported to an .sns file which you can import later on.

To import 'canned' messages

There are two ways to export 'canned' messages to your system. The first one is to use **Main Menu -> File -> Import settings** function. This is possible if you have exported some messages earlier. However there is a way to import regular text files and whole directories.

To import text files, in the 'Configure 'canned' messages' dialog click on **Import files/directory** button. Locate the necessary files or directories and click **Open**. Directory names are exported as tree node names, file names - as message titles, file text - as message body. If a message is bigger than 10 Kb, you will get a message asking you to confirm if you want to continue importing such a file.
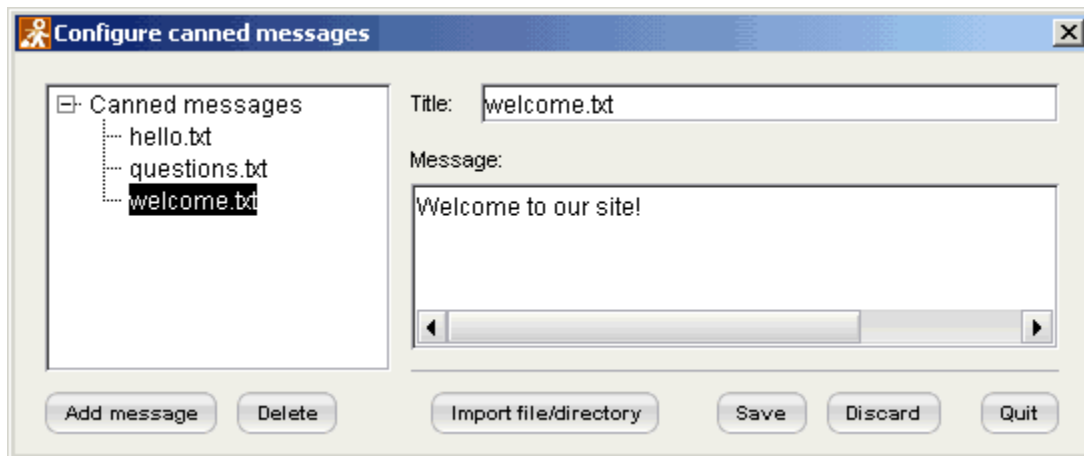
Importing canned messages

Searching for messages in a visitor's communication history

As it has been mentioned above, all the visitor's messages (as well as the messages sent to this visitor by an operator) are saved to his personal profile. The same can be said about the visitor's chat conversations (both text or voice ones). Messages, chat transcripts and information about voice calls together constitute the visitor's communication history. This communication history can be viewed via the 'Message board' section of a Visitor's profile ('Messages' tab).
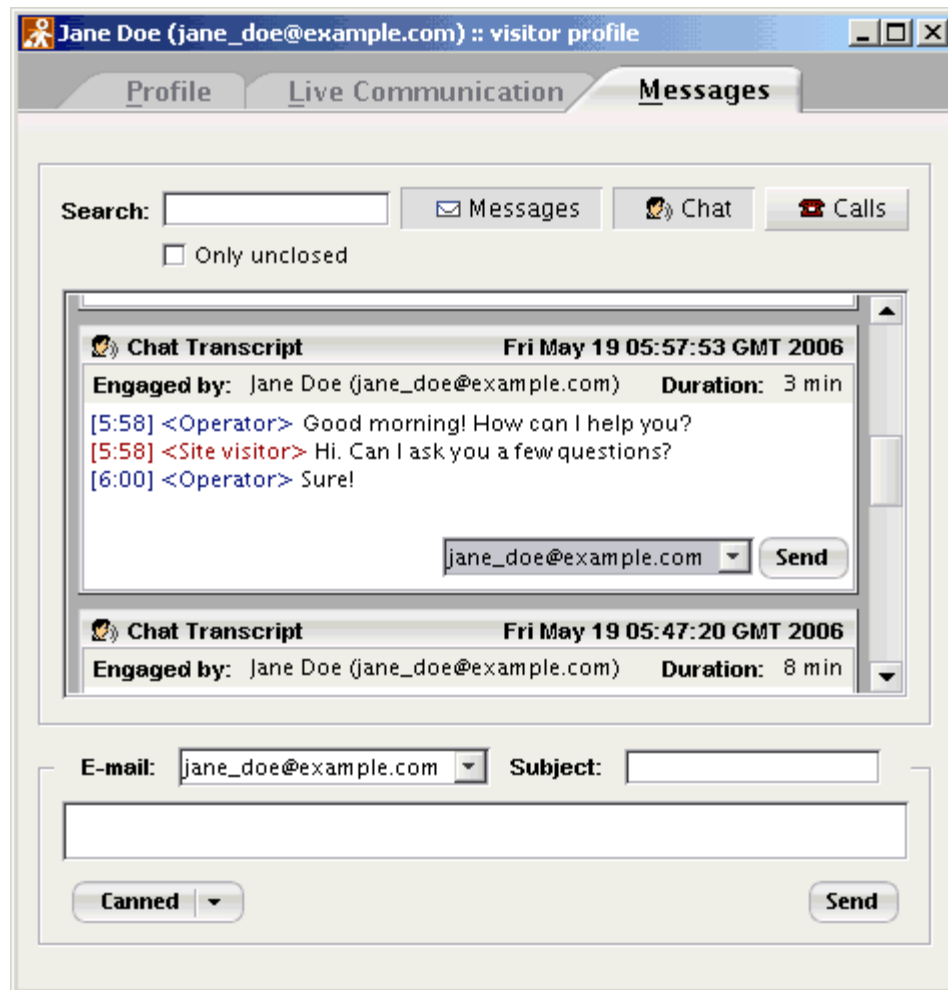
'Messages' section: looking through the visitor's communication history.

You can filter what is displayed in the Message board using the **Messages**, **Chat** and **Calls** buttons, the 'Only unclosed' check box and the 'Search' field.

- To view all the visitor's messages, click **Messages**.

- To view the transcripts of the chats the visitor has taken part in, click **Chat**.

- To view the records about the visitor's voice chats, click **Calls**.

Please note that the buttons can be used in different combinations or all at once (for example, pressing all the three buttons will display the whole of the communication history).

- Selecting the 'Only unclosed' check box together with one or more of the mentioned three buttons will display only the part of the visitor's communication history that has the status of 'unclosed' (unanswered

messages, unfinished chats – depending on which of the buttons are pressed).

- Entering a word or a phrase into the 'Search' field will result in displaying only the messages/chat transcripts which contain this word or phrase.

- If the chat transcript contains more than 5 lines only the beginning will be shown in the list. But you will see the **Show all** button at the end of the chat transcript. Clicking on this button opens the whole transcript.

- The chat transcript can be rolled up by clicking on the **Hide** button.

See also:

Live Communication 104

6.2.1 Using 'Push' functionality

'Push' functionality is an interaction of Sales-n-Stats with the visitor where the server automatically uploads data without a specific command from the visitor. Use **'Push'** functionality for achieving deeper interaction with a visitor. To open the 'Push content' dialog click on the **Push** button in the 'Live Communication' section of a Visitor's profile. You can display an html message directly via the visitor's browser, show him an image, or send a file. To access the 'Push content' dialog of any visitor from the queue or from 'Site Monitor', right-click on the visitor's badge and select **Push message** or **Push file**. All pushed messages can be accessed in 'Communication history' section.

To send a message to a visitor

1. Do one of the following:

- Right-click on the necessary visitor's badge and select **Push message** from the context menu.

- Click **Push** button in the 'Live Communication' tab in the profile of the visitor you are communicating with. Select the 'Message' tab of the 'Push content' dialog.

2. Enter your message into the space provided. If necessary, use **%name%** variable for operator's name or 'canned' messages (for information on 'canned' messages refer to '<u>Using 'canned' messages</u>'[117] section).

3. Click **Push**. The message opens in the visitor's browser in a popup window. You can use html tags to format the message before sending it to the visitor.
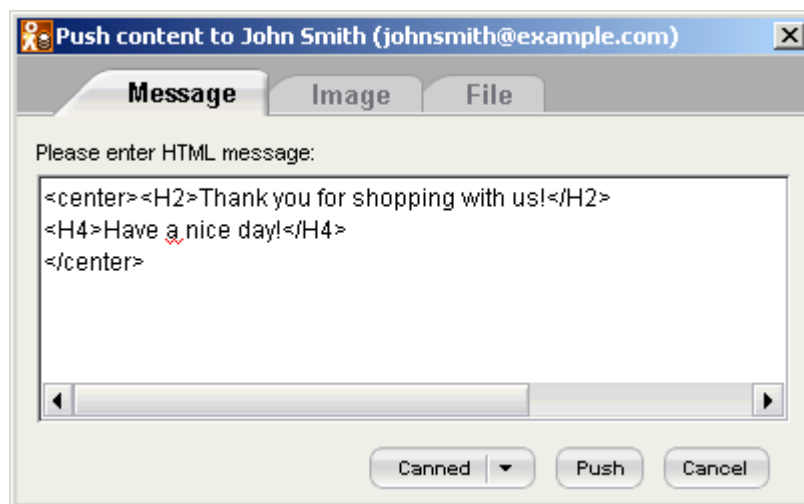
Using html tags in a message body.
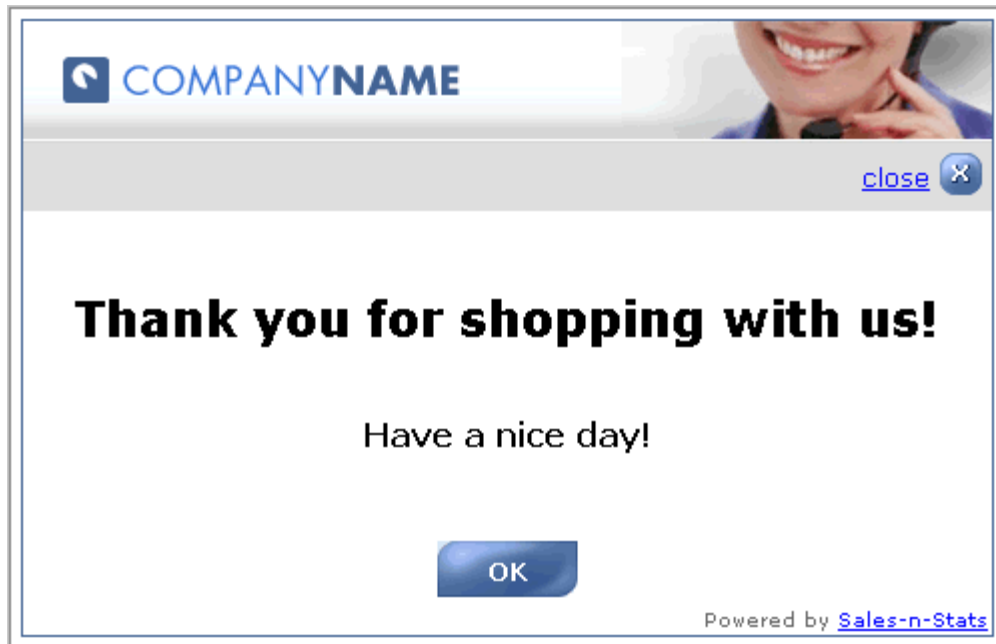
The message at the visitor's end.

To send an image

Select the 'Image' tab in the 'Push content' dialog, locate the image file you would like to send to a visitor and click **Push**. The image opens in a popup window in the visitor's browser. If necessary, the visitor can save it by clicking on the **Save image** button.

'Incoming image' pop up window: the sent image opens in the separate dialog in the visitor's browser

To send a file

Click on the 'File' tab in the 'Push content' dialog, locate the file you want to send and click **Push**. The visitor receives a notification about the incoming file in a popup window. He can open it or save on his computer.

_____

See also:

7. Using reports

Sales-n-Stats provides you with a proper reporting system for analyzing your e-business. 'Reports' section of the Sales-n-Stats web control and communication center allows you to use preconfigured reports or create completely new custom reports with the help of the built-in visual report constructor, if the set of preconfigured reports does not exactly match the nature of your business.

A wide range of preconfigured reports bundled with Sales-n-Stats reveal from what country visitors are coming from, how long their visits last, which paths they take through the site and much more. You just select the necessary report and enter the information to report on. The data is found, sorted, compiled and formatted in a clear and concise manner.

The system supports table reports, bar charts and pie charts. Data can be organized into groups, subgroups and subsubgroups. All reports have adjustable parameters and can be printed. Bar charts and pie charts contain business graphics for better data presentation.

Reports are based on the OLAP technology allowing dynamic data filtering, sorting, 3 level nested grouping, totals and subtotals for each group. With the Sales-n-Stats built-in report constructor you can define the outward appearance of the reports you have created (fonts, colors, the order and size of the columns); edit macros, if the report constructor cannot meet your requirements; print your report.

You can use the built-in reports via the 'Reports' section of the Web control and communication center terminal. This section is divided into two parts: the list of the built-in report categories on the left and the list of the reports belonging to the selected category on the right.
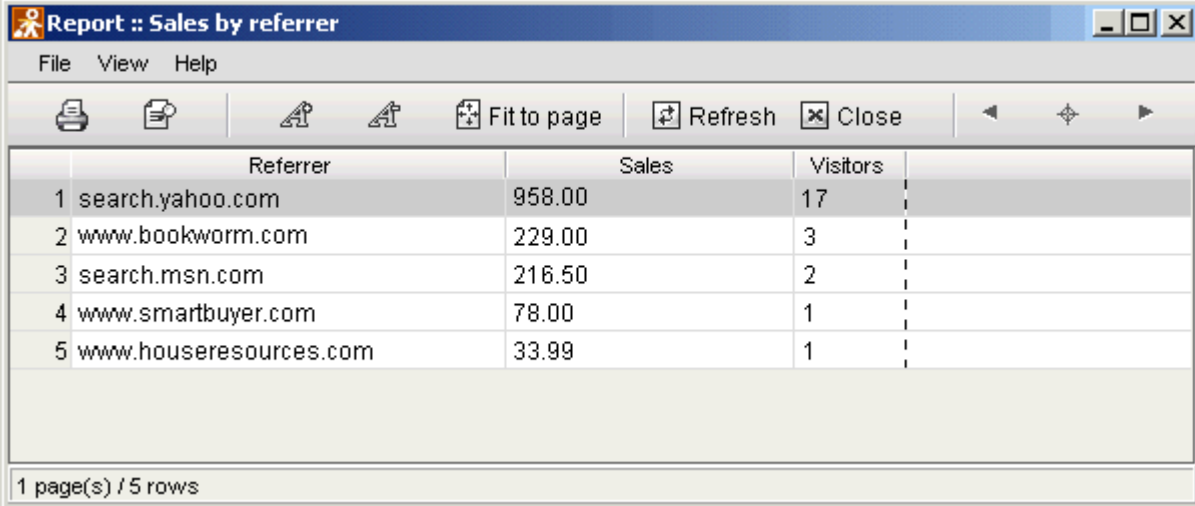

Generating a report

To generate a report either right-click on the selected report or select **Generate** from the popup menu. There are three types of reports: **table report**, **bar chart** and **pie chart**.
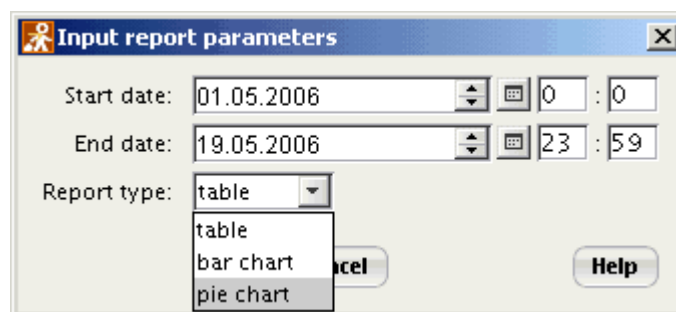
'Input report parameters' dialog: selecting the report parameters

The report opens in a separate window and allows you to view the necessary data, edit text font size, adjust the page parameters, see the print preview and print the report. Use the **Fit to page** button to effectively place the information on the page for printing. Click **Refresh** to renew the report data.

To export the report data to a CSV file, select **File -> Export to CSV...**.

'Sales by referrer' (table report type): fitting the information to page for printing.

Before printing the report you can see how it will look like via the menu above selecting **File->Print Preview**.

1. The **bar chart report** is shown within the page margins (marked blue) that define the size of the printing area on the page.
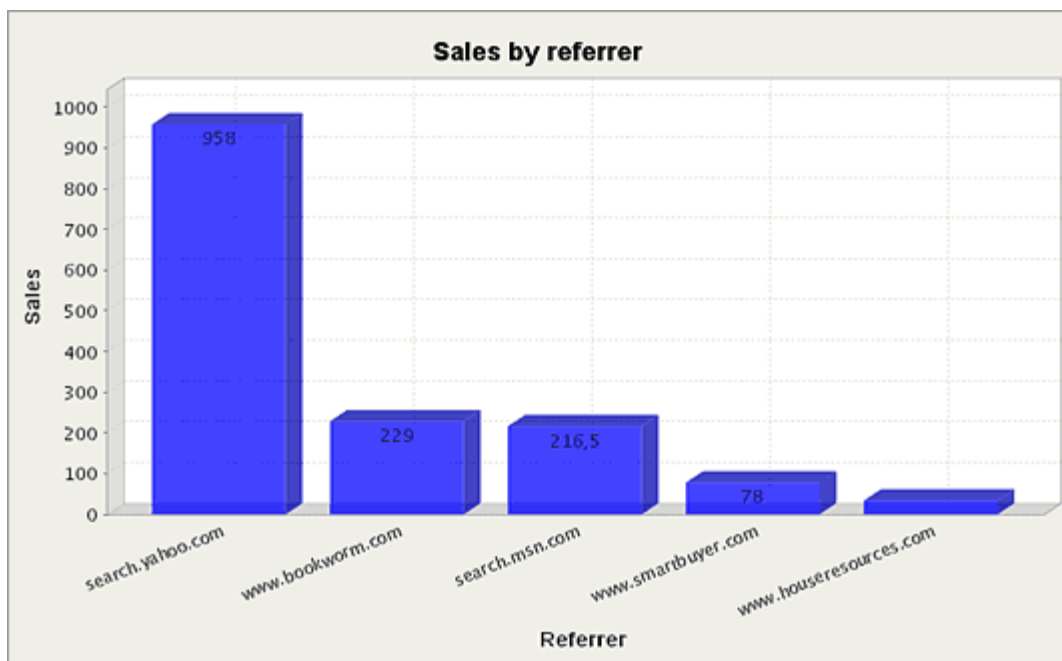
'Sales by referrer' bar chart report.

2. Dragging the markers along the edges of the report image allows you to resize it. Holding the **Ctrl** button you can mouse-drag the picture within the page margins to find the better position for printing.

3. **Pie charts** are an excellent way to show parts of a whole and emphasize general findings. Use the pie chart to show several categories.
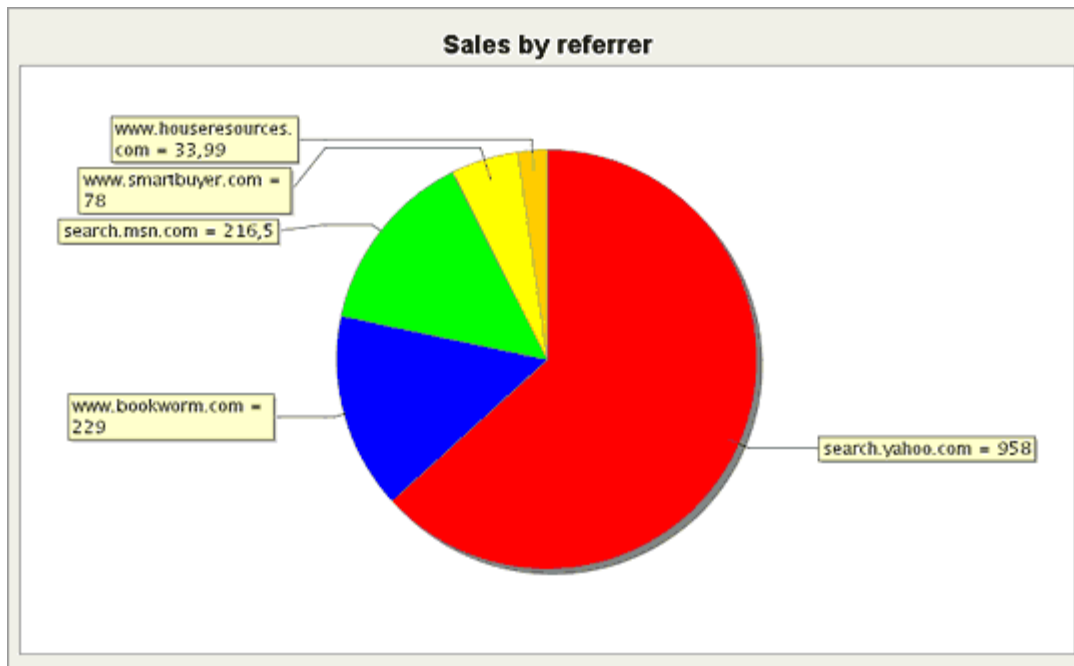
'Sales by referrer': pie chart report.

See also:

[*Built-in reports*](#) 130

[*Creating reports*](#) 134

[*Property Selector*](#) 179

7.1 Built-in reports

The preconfigured reports bundled with Sales-n-Stats are divided into several groups:

1. Web Statistics

2. Navigation

3. Reports by actions

4. Visitors Reports

5. E-commerce Reports

6. Marketing Reports

7. Other

1. Web Statistics

Use these reports to analyze the statistics on where the visitors come to your site from, how they move within the site, from what pages they exit the site.

- **Pages by popularity** displays the list of all web pages visited within a certain report period, classified by popularity.

- **Pageviews dynamics** shows the number of pageviews at your site for the selected period of time.

- **Search phrases** organizes by popularity the search phrases that drive traffic to your site from the most popular search engines.

- **Visitors by search engines** shows the number of the visitors coming to your site from the most popular search engines.

- **Web summary** defines the visitors' activity on the site, the number of hits, views, visits and visitors coming to a site, average time spent on a site.

2. Navigation

- **Entry pages** indicates what pages are used as entry points to your site.

- **Most popular site paths** shows visitors paths through the site ranked by frequency.

- **Page bounce rate** displays percent of bounce visits per webpage (visits including only one pageview).

- **Page navigation** shows how visitors get onto a site page and where they go from there.

- **Site exits** shows from what pages visitors most frequently abandon the site.

3. Reports by actions

You get information about the actions performed by the visitors at your site for a certain period of time.

- **Action details** shows all action and action fields during the selected period of time.

- **Actions by campaign** provides information about actions performed by visitors who came to the site through an advertising campaign

- **Actions correlation** allows you to find all actions that co-occur with the selected action within the same visit.

- **Actions summary** includes the statistics of actions by their types for the selected period of time.

- **Visitors who did action X** shows the list of the visitors who performed the specified action.

4. Visitors Reports

- **Top visitors** lists the visitors who came to your site during the selected period of time most frequently.

- **Visitors dynamics (from referrer)** shows the number of visitors coming from the specified referrer.

- **Visitors by origin** defines distribution of the visitors by their origin (country and optionally ipRegion).

- **Visitors by source** sorts the visitors according to the referrer (host or URL) and shows how many visits were made from this referrer.

- **Visitors dynamics** indicates the dynamics of the site visits and shows the number of new visitors coming to the site within the selected period of time.

- **Visitors from referrer** displays the visitors who came from the specified location.

- **Visitors who viewed page X** shows the list of the visitors who viewed the specified page.

5. E-commerce reports

These reports enable you to analyze the sales results by sales volume per item (product); sales volume per period; sales volume per visit from the certain search engines; sales volume per number of the usage of particular search phrases. To get a better overview of the sales results combine the information from all of

these reports.

- **Campaign ROI analysis (PPC)** helps you estimate the efficiency of Pay per Click advertising campaigns.

- **Product sales dynamics** defines total sales for the selected period of time split by products.

- **Products by campaign** provides a list of products purchased by customer who came through a specific advertising campaign.

- **Sales by referrer** shows the number of processed orders from the visitors coming to your site and the specific websites (referrers) they come from.

- **Sales by search engines** displays the information about purchases made by the visitors who came to your site from the most popular search engines.

- **Sales by search phrase** shows the list of search phrases that the visitors used to come to your site and sorts the visitors by the number of purchases they made regarding these search phrases.

- **Total sales dynamics** shows the total sales turnover for the selected period of time.

6. Marketing Reports (Auditorium)

Use these reports to select the visitors satisfying definite conditions. Each report in this group corresponds with certain conditions.

- **Customers by category** selects the customers who purchased the products from the certain product category.

- **Customers by number of orders** selects the customers according to the number of processed orders.

- **Customers by product** shows the customers who purchased the definite product.

- **Customers by sum of orders** selects the customers by the sum of their orders.

- **Recent customers** shows the customers who last visited site later then the certain date.

7. Other

If you have any difficulty in referring your own report to any of the default groups put it into the group called **'Other'**. Besides you can edit any of the preconfigured reports from the group **'Other'**.

- **Average pageview duration** shows the average time during which visitors stay at certain pages of your site.

- **Campaign geography** breaks down campaign visitors by their geographical location.

- **Campaign conversion latency** shows how long it takes a visitor to perform a goal action.

- **OS and Web browsers by popularity** shows what browsers are most popular among visitors with the different operation systems.

- **Top referrers by country** displays web resources driving visitors from the specific country to your site.

- **Web Browsers by popularity** lists the web browsers most frequently used by your visitors.

Important!

The number of preconfigured reports is constantly increased, that is why your version of the software might contain new reports not described in this manual.

See also:

Creating reports 134

Property Selector 179

7.2 Creating reports

Though Sales-n-Stats provides you with the set of preconfigured reports, you can create your own reports with the help of a built-in visual report constructor.

To create a new report follow the next steps:

1. Click **New report (constructor)**.

2. Enter a report's name into the 'Input report name' field.

3. Click **OK**.

'Input' dialog: entering a new report name.

4. Report constructor window opens in the **'General'** tab.

5. Use the following tabs:

    1. **General** – to enter the report's name, description and to select the folder it will belong to;

    2. **Data rows** - to specify the table columns of your reports;

    3. **Groups** – to organize the information into groups according to the desired parameters;

    4. **Subgroups** – to organize the information within a group;

    5. **Subsubgroups** – to divide the information within the subgroups into smaller units.

1. General

The 'Report name' field will be filled in automatically with the report name you have entered into the 'Input' dialog. The comment you put in the 'Description' field prompts what information the report will present. The next step is selecting one of the existing groups your report will belong to from the 'Folder' drop-down list. You can also enter additional information on the report into the 'Help' field.

This information can be accessed later as follows:

- right-click on the necessary report and then select **Help**; or

- click on the **Help** button in the 'Input report parameters' dialog.

2. Data rows

Any report consists of a number of rows and columns. 'Data rows' section allows you to set the order of the rows in your report. Select what your report is about in general from the 'Select from' drop-down list so that the report engine selects information about visits first. Then go to the 'Table columns' section to define the list of columns of your report and select what information will be presented in each column. For example, the report 'Daily Orders' can contain the following columns: Last name, First name, Product, Subtotal.

To add a column:

1. Click **Add**. A new row appears in the 'Table column' section.

2. Enter the name of the column into the 'Header' field.

3. Double-click the empty field in the 'Expression' column, click the ⬚ button and select the expression from the list of the given values (for example, first name, last name, product name, total)

4. The format is set automatically, but you can select a more appropriate one.

5. Check out **'Totals'** next to those columns for which you would like to see the total number in the table. Remember to select 'totals' only for columns with numeric data.

The 'Sort by' field defines what column the table will be sorted by. Select the desired column header from the drop-down list and either**ascending** or **descending**. Arrange the order of the columns in your report by selecting a column header and clicking on the appropriate 'Column order' arrow (up/down).

'Data rows' tab: arranging the rows in the 'Daily Orders' report.

'Row filter' section helps you filter the information in your report. For example, you might want to see your customers from the US who have ever made a purchase in your store.
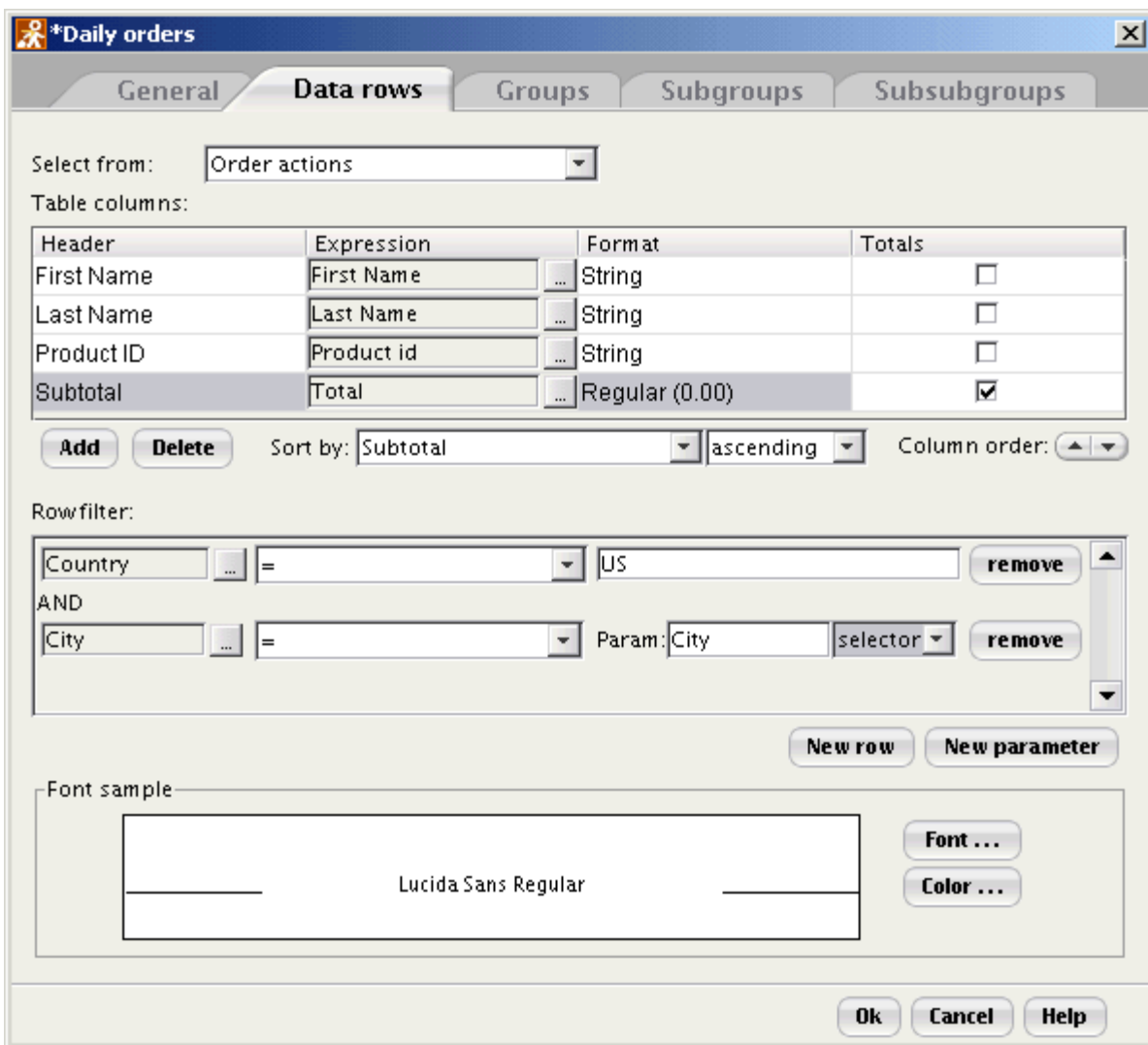
1. Click **New row**.

2. Then click on the ⬜ button and select an appropriate parameter from the popup menu. In our case the parameter is **Country**. In the next field select the "=" sign and enter 'US' or any other country into the last field of the row.

To delete a filter click **remove** next to the one you want to delete.

To restrict the filter you have created you might also set the necessary parameters. For example, to see the visitors not only from a definite country but also from a city follow the next steps:

1. Click **New parameter**. A new parameter row appears.

2. Then click on the [...] button and select a parameter ('Billing city') from the popup menu. In the next field select the sign of relation and enter the parameter name ('City') into the 'Param' field.

3. Every time generating this report you will first see the 'Input report parameters' window that allows you to select among the parameters you have created. Click **OK** to confirm.

If while generating the report you want to enter the parameter into the field manually, select **'editor'** in the last field of the row. To select the parameter from the list suggested by the system, choose **'selector'**.

Report Constructor window: adjusting the report filters.

Selecting font size and color

'Font sample' section allows you to configure the appearance of your report. To change the font, size and color of the text:

1. Click **Font**. 'Select text font' dialog opens.

2. Select a necessary font and change its size by moving the slide. You see the changes in the 'Sample typing area' at once.

3. Click **OK** to apply the changes or **Cancel** to exit.

To select the color of the text in the report do the following:

1. Click **Color**. 'Select text color' dialog opens.

2. Select a necessary color - use one of the Swatches, HSB, RGB tabs.

3. Click **OK** to apply the changes or **Cancel** to exit.

3. Groups

'Groups' section allows you to unite the report rows into groups according to different parameters. For example, you can group the information about the orders by the time they were made.

By default there are no groups ('No grouping' radio box is enabled). Before you divide your report into groups select what parameters you will group the information by.

Select either **'Group data by'** or **'Group by period'** section:

- **'Group data by'** section allows you to define the common value of strings in your report and unite them into different groups, for example, by the following parameters: product category name, email address, country, order ID, etc.

1. Select the appropriate parameter in the 'Group data by' field by clicking on the button.

2. Then select the name of the group in the 'Group title' field. The title format is set automatically but you can select it yourself from the drop-down list.

3. To group the data in your report select **Days**, **Weeks**, **Months**, **Quarters**, **Years** in the 'Periods' field of the 'Group by period' section. If you are not sure about the period select **User-defined**. Then when generating this report you will be able to select the appropriate period in the 'Input report parameters' dialog. Then select the necessary data format **MM.dd., Month day, day** in the 'Date format' field. If you select 'Default date' the

system will use your local settings. 'Group summary' section allows to group information within a column. ' Format' (Integer, String, etc.) is set automatically or you select it yourself.

4. In the 'Sorting' section arrange the information within the columns. Select an appropriate parameter from the list in 'Sort by'. Select either **ascending** or **descending**.

To delete a parameter click **remove** next to the parameter you would like to delete.

'Font sample' section allows you to configure the appearance of your report. To change the text font click **Font**, select the necessary font, and change its size by moving the slide. You see the changes in the 'Sample typing area' at once. Click **OK**.

To select the color of the text in the report click **Color,** and select a necessary color - use one of the Swatches, HSB, RGB tabs. Click **OK**.

Adjusting the groups of data within the table columns

'Group summary' section is used as follows:

- If you have already defined the columns of your report in the **'Data rows'-> 'Table columns'** section, use 'Group summary' to organize the information into groups within a column according to the selected parameters.

- If the report columns have not been defined in the 'Table columns' section do it in the 'Group summary' section.

4. Subgroups/Subsubgroups

Organize the information within the groups into the subgroups and the subsubgroups on the same principle as you organized it in the 'Groups' section. Sort the data within a group according to certain parameters.

Editing a report

You can save the reports you create yourself in any group within the set of preconfigured reports. Your reports

will be marked with the ✏ sign which means that you not only can generate them but also edit, rename and delete.

To edit a report follow the next steps:

1. Right-click on the report you want to modify and select **Edit** from the popup menu.

2. Make necessary changes in the corresponding tabs and click **Save**.

3. If the report is not marked with the ✏ sign, you can not edit it in the report constructor. If you need to modify such a report, right-click it, select **Edit** from the popup menu and go to 'Macro' tab. Make necessary changes and then click **Save** to apply them.

Note: To edit a macro you need some programming skills. If you are not sure how to do it, contact our support team for more information.

To copy the selected report right-click the necessary report and select **Copy** from the popup menu. The 'Input new report name' dialog opens. Enter the new name and click **OK**. You will have two identical reports with different names.

To rename the existing report right-click it, select **Rename** from the popup menu, enter new report name, and click **OK**. To delete a report, select the necessary one from the list and click **Remove**.

See also:

8. Administrating Sales-n-Stats

- This chapter deals with general system settings and tells you how to set up Sales-n-Stats [zones](182), [filters](189) , [actions](159), [Visitor's Profile](202) and [Visitor's Badge](206).

- Find out how to perform [Data Center maintenance](191), and how to change [Data Collector](194) settings.

8.1 Main menu

Main system menu allows you to organize all kinds of information about your visitors, website and system functioning. You can adjust all the necessary settings to define what information about the visitors and their activity on your site Sales-n-Stats will gather, store and present. The options embedded in the Main Menu allow you to run specific tasks or monitor your system or services while remaining out of your way.

The **Main Menu** is located in the upper left-hand corner of your screen. It consists of four choices explained below: **'File'**, **'Tools'**, **'Connection'** and **'Help'**. When you select an appropriate option a submenu drops down.

File

Select 'File' in the Main Menu to import the system settings, export the settings, or exit the system.

Import settings

Select 'Import settings' to restore the necessary settings or import new ones, choose the necessary file and click **Open**.

'Import system settings' dialog opens. Select the check boxes in front of the settings you want to import. Select the 'Drop existing data' check box to import new settings without saving the existing ones. If you leave the check box clear, the imported settings will be added to the existing ones.

Settings	What 'Drop existing data' removes
Visitor's Profile	All custom profile fields
Actions	All action patterns
Visitor's Badge	Tokens and Detailed View settings
Filters	All filters
Reports	All reports
Zones	All zones together with all pageviews
Adv. Campaigns	All advertising campaigns

Then click **OK** to confirm or **Cancel** to quit.
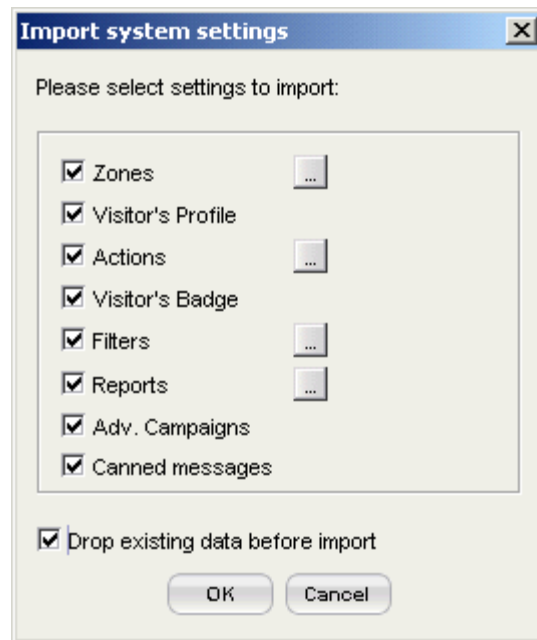
'Import system settings' dialog: selecting settings to import.

Note: **'Import'** allows you to keep the information up-to-date overriding existing settings with those in the imported file.

Export settings

'Export settings' enables you to edit the system settings that can be then re-imported into Sales-n-Stats. Save the selected system settings in a file and then adjust your own settings.

To export the settings select **Main Menu->Tools->Export settings**. 'Export system settings' dialog opens. Then select those settings you want to export and click **OK**.
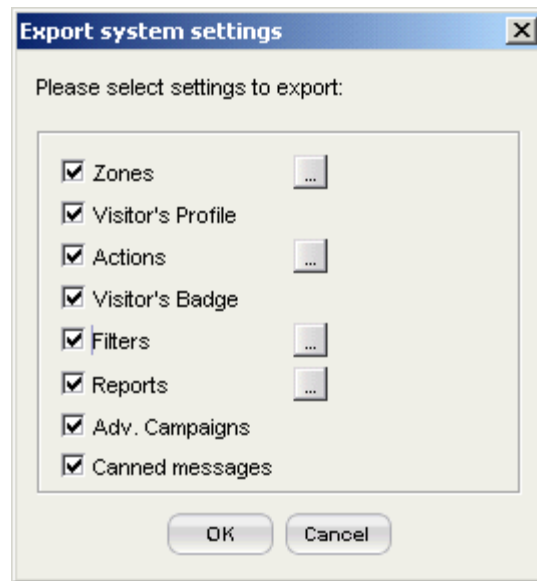
'Export system setting' dialog: selecting the settings you
want to export.

Note: **'Export'** allows you to save a subset or all of your existing settings, edit them and then re-import it into the system.

Tools

The 'Tools' submenu gives you the following options: 'System settings', 'Data Center maintenance', 'Event log' and 'Data Center console'.

System settings

'System settings' allows you to configure the system and manage its parameters for better monitoring your site. For more information refer to the chapter 'System settings' ₁₅₇.

Data Center maintenance

Select Data Center maintenance in the **Main Menu->Tools** to get a quick access to the 'Data Center maintenance' settings section. For more information refer to the chapter 'Data Center maintenance' ₁₉₁.

Data center maintenance

Data center maintenance

Pageviews:	247	All actions:	0	
Visits:	40	External actions:	0	
Visitors:	7	First pageview:	Mon Apr 10 13:50:29 GMT 2006	

Purge All **Export All** **Import**

Summary for the period

Start date: 01.05.2006 ▲▼ ▣ 0 : 0

End date: 18.05.2006 ▲▼ ▣ 23 : 59

Pageviews:	114
Visits:	22
Visitors:	4

Purge **Export** **Export & purge**

Embedded database

Location:	.\var\db
Last backup:	Thu May 18 07:19:10 GMT 2006 **Backup database**
Backup size(Mb):	0,18
Data size(Mb):	1,05
Log size(Mb):	0,35
Maximum log size:	50

Save Discard **Quit** **Help**

'Data center maintenance' dialog

Event log

'Event log' provides a centralized collection point for all kinds of error reports, system alerts, diagnostic messages, and status messages generated by the system. The system records the occurrence of significant events. An 'event' is any change that occurs in the system, for example, a user's logon. Because the system may experience hundreds or thousands of events each second, it is important to distinguish which events require the immediate attention of a system administrator. Such events are recorded as entries in the system's

event log for later analysis.

You can select not only the necessary system component but also an appropriate filter for it. Use **Refresh** to update the information in the 'Event log'. Use **Cleanup** to clear the visible rows in the 'Event log'. Select the necessary filter or filters and click on **Cleanup**.

Data Center console

Data Center console is used to address Data Center directly via macro commands. If you do not possess the necessary knowledge of macros use the Data Center console only if our support service managers ask you to do it.

Data Center console consists of two parts. The lower part of the console allows you to enter the appropriate macro commands. To see the results in the upper part of the dialog click the **Execute** button. The results that appear in the upper part of the Data Center console will be marked blue.

Connection to Data Collector. Installing a collector

In some cases you might need to stop connection via **Main Menu->Connection->Stop connection/Start connection**, for example, if you change anything on your website or before breaking the Internet connection.

To edit Collector settings select **Main Menu->Tools->Collector settings**. To re-install collector or change its location use the **Update license/Install collector** button. The 'Update license' dialog opens, select **Continue** to start the installation. 'Installation Step 1. Defining Data Collector location' dialog opens. Then follow all those steps you took while installing Sales-n-Stats. (Refer to the [Installing Sales-n-Stats using the installation wizard](#) 21 chapter).

Select **Main Menu->Connection->Traffic details** to get a quick access to the 'Traffic monitoring' edit dialog.

An operator can change his communication status via **Main Menu->Connection->Live Help Available/Live Help Not Available** or by clicking on the **Click for Live Help** button located in the upper left corner in all the tabs of the Web control and communication center.

Help

If you need help or want to get more information about Sales-n-Stats select **Main Menu-> Help->Help /About** or press F1 on the keyboard to access the Help files or get context help for the interface element you are currently using. The system displays an overview, summary, or explanatory topic for a page or for the entire window.

To get information about a certain page, dialog, message box use the **Help** button situated next to the **OK** and **Cancel** buttons in the window.

Show Quick Start tour opens a demo site consisting of several web pages demonstrating the basic capabilities of Sales-n-Stats and teaching how to use it in a simple and effective way.


See also:

System settings 157

General settings 148

Data Center maintenance 191

Data Collector 194

8.2 General settings

The General settings area covers a miscellaneous range of settings, including the options that you use to adjust some system settings for the operator–visitor interaction. You get access to the 'General settings' section via **Main Menu->Tools->System settings->General settings**.

'General settings' section consists of four parts:

- **'General'** 148 section where you adjust the parameters of your communication with the visitors.

- **'Network parameters'** 151 section where you define the parameters that allow you to get notifications about the system functioning.

- **'VoIP Settings'** 152 section where you select whether you want to receive voice calls or not and adjust the voice chat settings.

- **'Adv. Campaigns'** 155 section where you enter the information about your advertising campaigns.

General

The 'General' section allows you to adjust the most general settings that will affect your communication with visitors.

'General settings' dialog: adjusting system settings

Enter your name into the **'Operator name'** field if you want it to be seen by the visitors in the chat sessions.

Use the **'Maximum number of chats'** field to set the number of chat sessions you want to be able to lead simultaneously. You will be shown **'Incoming chat requests'** from your visitors until the number of requests exceeds the number specified here. If there are more visitors wishing to initiate communication with an operator while the allowable number of chat sessions is already opened, they get automatically queued by the system. When the operator finishes one chat session, he is prompted to talk to the next visitor from the queue (the 'Incoming chat request' dialog is opened).

Select the check boxes **'Play sound on a new chat request'** and **'Play sound when a new visitor arrives'** to hear a signal when a visitor comes to your site or initiates a chat with you. This option is likely to turn out the most useful for the websites where there is not a great number of visitors coming during the day.

The **'Operator response timeout'** (30 sec.) field indicates the period of time during which the **'Incoming chat**

request' dialog stays open. When the time runs out the system directs a visitor to the **'Communication Queue'** section.

If you select the **'Display 'Audio hardware not found' warning'** check box, and the necessary audio hardware is not found, an appropriate warning will appear at program startup.
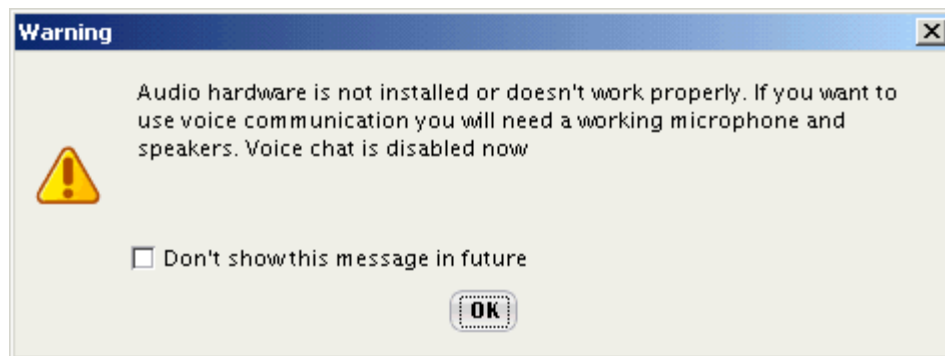
A warning message

'Show program window at startup' check box allows you to see the main frame when you start Sales-n-Stats. This option is also available by right-clicking on the Sales-n-Stats icon in the system tray and selecting 'Show main frame at start time' check box.

'Receive notifications by email' check box allows you to receive email messages when a visitor leaves you an offline message.

'Remove the following parameters from URL' field contains a list of URL parameters which you want to be concealed from the operator (for example, when some parameters are not significant) - like XSID, xid, phpbb2mysql_sid, osCsid.

'Activity timeout' is the time period after the last activity performed by a visitor on your website. It might be either a last click or a last signal from any site page. After this last click or signal the system waits for 210 seconds and then a visitor disappears from Site Monitor. If you edit 'Activity timeout' please make sure its duration is more than the 'Visitor tracking interval' specified in the Data Collector settings.

'Sleep timeout' is a period of time after which the system indicates visitors as 'sleeping'. This means they stay on the same page and do not perform any actions.

'Timeout to perform visible reactions' field allows you to define the period of time after which a reaction to an action executed on the site will take place.

'Warn if number of lines in report exceeded' field allows to set a maximum number of lines in reports. This

may be useful if you print your reports. If you enter 0, a warning is never displayed.

Network parameters

To be notified about the system functioning you need to set network parameters. Sales-n-Stats sends email notifications about certain events within the system, for example, when the traffic exceeds an established limit.

'Network parameters' consists of two sections: 'Use HTTP proxy' where you adjust the necessary settings to get access to the Internet via HTTP Proxy, and 'Mail parameters' where you define the parameters necessary to receive system notifications.

'Network parameters' section

Use Http Proxy section

Select the 'Use HTTP Proxy' check box if you don't have a direct internet access. Enter host name and port

number.

Select 'Proxy Authorization Required' check box only if it is necessary. Then enter the user name and password that you get from the administrator into the appropriate fields.

Mail parameters section

Specify your email in the 'Send mail from' field and your visitors will be able to see this email address in the 'From' field in the email messages. The field 'Send notifications to' should be used to enter the email to which you want to receive system notifications.

Define the settings of the SMTP Server that you use: the mail domain name should be entered into the field 'SMTP Host', the port – into the field 'SMTP Port'.

Select the 'SMTP Authorization Required' check box if it is necessary. Then enter the user name and password into the corresponding fields. Click **Save** to confirm the changes.

POP3 (Post Office Protocol) is used for the collection of email by a mail client from an email server. If your email server software uses POP3 you should:

- select the 'Use POP before SMTP authentication method' check box;

- find out which of mail servers your account uses and enter it into the 'POP3 Server' field.

VoIP Settings

If you don't have any audio software on you computer you will see the warning message "Sales-n-Stats cannot access your audio hardware. All audio settings are disabled" when you open the 'VoIP Settings' section via **Main Menu->Tools->System settings->General settings**.

Select the 'can receive voice calls' check box to enable voice calls for your visitors. It means that when a visitor clicks on the **'Click for Live Help'** button on your site, the 'Start communication' dialog opens and the visitor can select between a text and a voice chat.

'Local IP discovery' section

The 'Local IP discovery' section provides you with several different ways of defining the IP address via which you want to connect your clients.

For a computer to communicate with other computers and Web servers on the Internet, it must have an IP address. An IP address (IP stands for Internet Protocol) is a unique 32-bit number that identifies the location of your computer on a network.

'Autodetect' option is enabled by default and defines your IP automatically. The system defines the addresses using the following principles:

- the system selects the first address among the public (Internet) addresses;

- if there are no public addresses the necessary IP address is selected among the Local addresses

(192.168/16, 172.16/12, 10/8);

- if two previous principles cannot be satisfied the system selects the first address among the Internal addresses (Loopback addresses (127/8).

Using this method the connection is only available via the IP address that was defined automatically.

Network Address Translation (or NAT) allows a single device, such as a router, to act as an agent between the Internet (or "public network") and a local (or "private") network. This means that only a single, unique IP address is required to represent an entire group of computers.
NAT allows you to connect to a client from the different network. If you use NAT to connect a client from the different network, select the 'I'm behind NAT' check box and enter the necessary IP into the 'External address' field that appears in the same row.
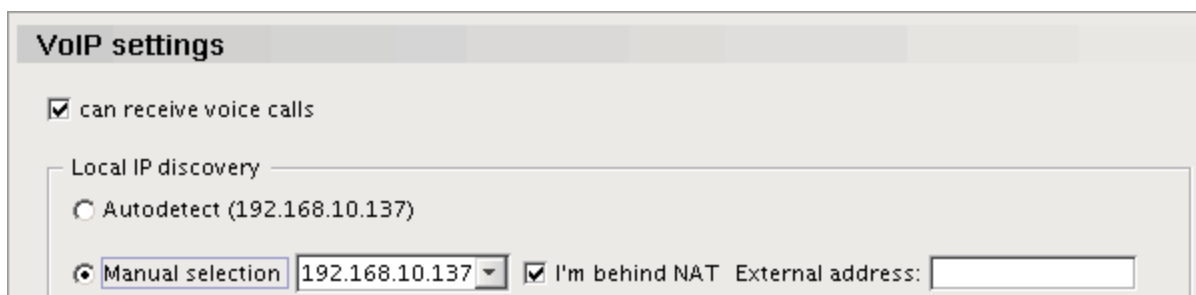
Note: find out if you use NAT from your administrator.

Important!

For correct and efficient work of VoIP functionality ask your system administrator to adjust the NAT server using the following settings:

- Range: 5488-5500

- Protocol: UDP

- Destination address: operator's computer

VoIP Settings: using NAT

If you want to set the IP address manually, enable the 'Manual selection' option. You will be able to choose the

necessary IP from the given list.

If you use NAT to connect a client from the different network, select the 'I'm behind NAT' check box next to 'Manual selection' and enter the necessary IP into the 'External address' field that appears in the same row.

Note: find out if you use NAT from your administrator.

Adjusting a routing table is a more complex but more flexible way to define the local IP addresses. This method requires some knowledge and skills of a system administrator.

Operator Terminal can be connected to different networks via different IP addresses and routing table allows you to adjust the blocks of rules for selecting an appropriate IP address.

Each row in the table presents a separate rule that consists of a network address, network mask, local address (interface), and NAT address. Local addresses and Mask determine the range of the IP addresses of the clients you want to connect. For example, IP address 192.168.0.1 corresponds to the following network address 192.168.0.0 and netmask 255.255.255.0.

The rules are checked in accordance with the following priority: the higher the rule in the table the higher its priority. The system selects the result of the first rule satisfying the initial conditions.

This method is useful for the most precise settings of the non-standard net configuration. Set as many rules in the table as you consider necessary and sufficient for defining IP addresses.

Example

Operator Terminal is connected to two networks: 192.168.10.0 with 192.168.10.137 IP address and 192.168.15.0 with 192.168.15.2 IP address. It uses NAT-gateway 192.168.10.137 with the external IP 212.84.22.96 to get access to Internet.

Net address	Net mask	Local address	NAT address
192.168.10.0	255.255.255.0	192.168.10.137	<none>
192.168.15.0	255.255.255.0	192.168.15.2	<none>
0.0.0.0	0.0.0.0	192.168.10.137	212.84.22.96

Note: If you want to use this method but don't possess the necessary skills feel free to refer to our Support Team for help and assistance. Ask your system administrator for the necessary settings.

VoIP Settings: adjusting a routing table

To add a new set, do the following:

1. Click **Add**. A new row appears in the table.

2. Fill in the appropriate fields ('Network', 'Mask', 'Interface', 'NAT address').

3. Click **Save** to apply the changes.

If you want to move the sets in the table, use the **Up** and **Down** buttons. To delete a set from the table, select the necessary set and then click **Remove**.

Adv. Campaigns

When you set up an advertising campaign, visitors come to your site from referrer sites. There are two ways to know that a visitor came from a specific referrer. The first way is to provide a referrer with a link to a special page on your site (for example,http://www.mysite.com/adv_redirect.php?id=13456) , to which the visitors will come. You can have a separate page for each of your referrers. In this case you know that all the visitors who viewed this page came from this or that referrer. The second way is to know the URL of the page where a referrer placed a link to your site. It is possible to use a pattern, if you do not know the exact link or the referrer has multiple links (for example, *//*my.partner.site.com/*). Then you know which referrer a visitor was directed by if he came from this URL.

To enable Sales-n-Stats to recognize advertising campaigns, do the following:

1. Click **Add**, enter new campaign name and click **OK**.
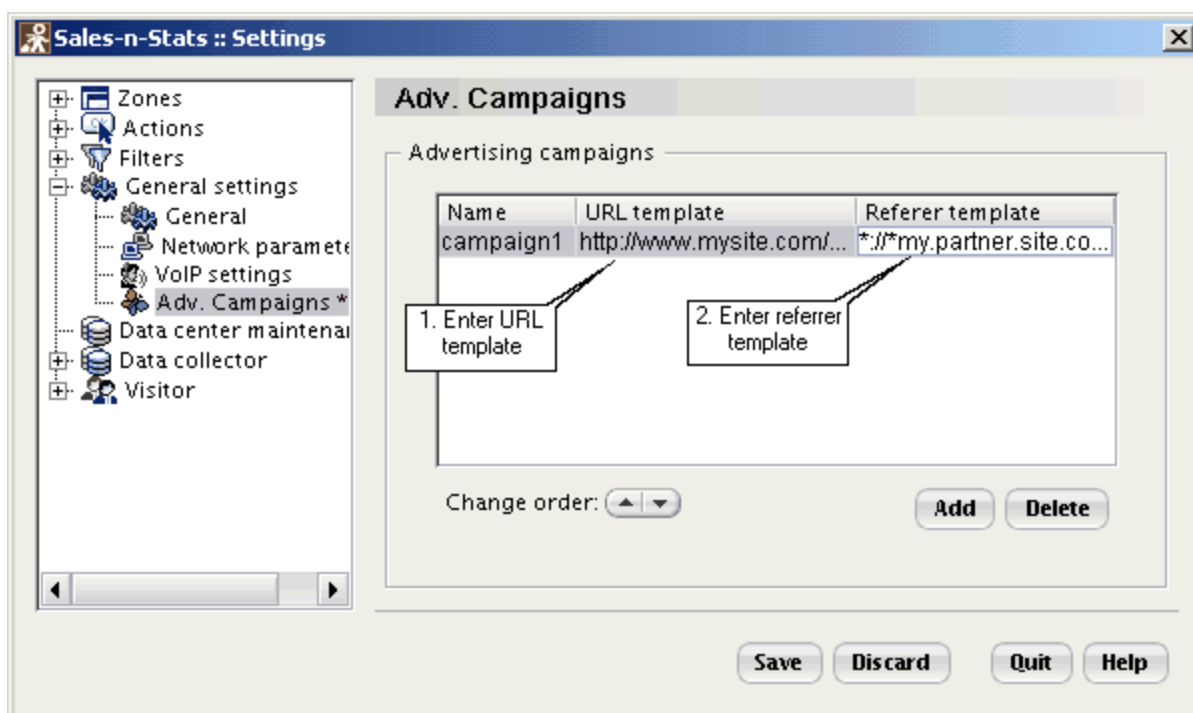
Adding an advertising campaign.

2. Double-click in the 'URL template' field and enter URL template. It is a URL of the page onto which the visitors from a specific referrer come.

3. Double-click in the 'Referrer template' field and enter Referrer template. It is a URL of the page from which the visitors from an advertisement website come.

Note: If you enter both parameters for the same advertising campaign, the conditions will be joined by **OR** operator. This means that the visitor's data will have to satisfy **ANY** of the conditions for the visitor to be identified as referred by this or that campaign.

8.3 System settings

The 'System settings' section allows you to define the overall configuration of your system. It is accessible via **Main Menu->Tools->System settings.**

The left side of the 'System settings' dialog displays a tree menu from which you access the subsections of the 'System settings' and edit the parameters defining how your system functions.
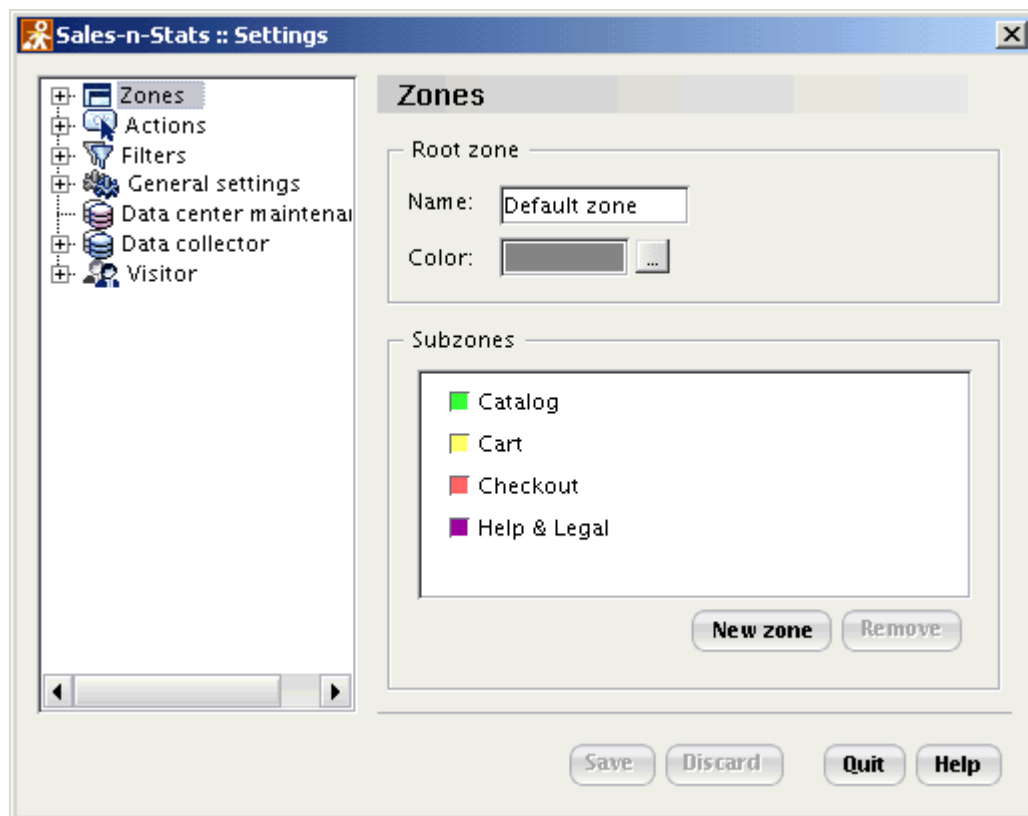
'System Settings' window

The major subsections of the 'System settings' are the following:

- **Zones**

- **Actions** – allows you to set up the actions which you want to be recognized by the system and if necessary, to adjust the system reactions to each of the recognized actions;

- **Filters**

- **General settings**

- **Data Center maintenance**

- **Data Collector**

- **Visitor** – includes two subsections: 'Badge setup' and 'Visitor's Profile'; the former allows you to define what kind of visitor information will be presented on a visitor's badge; the latter allows you to adjust the fields of a Visitor's Profile.

See also:

8.4 Setting up action patterns

Before Sales-n-Stats begins to recognize any actions performed by the visitors at your website, these actions need to be set up in Sales-n-Stats. If you intend to use Sales-n-Stats for monitoring an e-commerce site based on **X-Cart** or **LiteCommerce**, you can use a set of actions preconfigured specifically for this purpose. However, if Sales-n-Stats is used for monitoring a site of some other type, actions will have to be created manually.
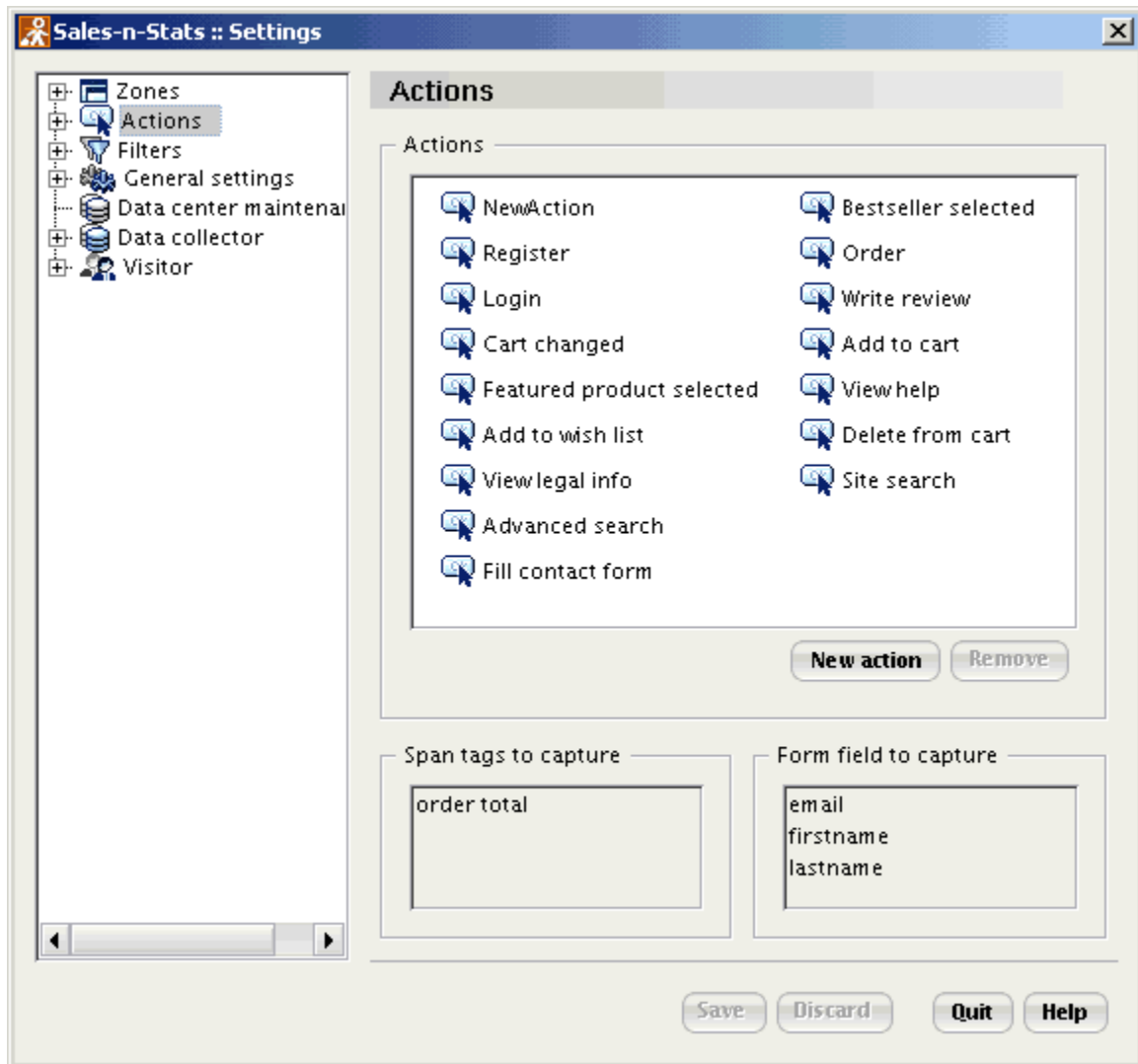
'Actions' settings main page

The 'Actions settings' section is divided into three parts:

- **'Actions'** where there is the list of existing actions;

- **'Span tags to capture'** where you see all the span tags that were captured for all actions;

  Span tags can be used if it is impossible to identify pageview just by specifying a URL pattern. It is a tag you embed in the source code of your web page. It does not show in the browser, but can be recognized by Sales-n-Stats. Read more in the <u>'Span tags'</u> 169 section of this chapter.

- **'Form fields to capture'** where you see the list of the form fields captured for all actions.

The span tags or form fields that you want to store can be defined via the 'Pageview pattern & data capturing' or 'Form submit pattern & data capturing' dialogs when you adjust action steps in the 'Variants' section.

To remove an action, right-click it in the tree menu and select **Remove**. To renew the action settings right-click this action and select **Refresh**. To apply all the changes to the selected action, right-click on the necessary action in the tree menu on the right and select **Save**. If you do not want to save the changes select **Discard**. To exit the action settings dialog without changes click **Quit**.

To rename an action right-click on the appropriate action and select **Rename**. Then enter new action name into the 'Enter name' field of the 'Rename Action' dialog and click **OK** to apply.

To edit the necessary action right-click on the necessary action and select **Edit**. Or double-click on the necessary action and this action edit dialog opens. Action settings open in the 'Action fields' tab.

See also:

8.4.1 Using preconfigured actions

The set of preconfigured actions can be modified according to your needs: you can edit an existing action, add an action of your own or delete an action you do not need.

If you want to view or edit the settings of a preconfigured action, go to **Main Menu->Tools->System settings->Actions** and select the necessary action from the tree menu. The edit action settings section opens on the right. The 'Class name' field displays the class of the action opened for viewing/editing.

The three check box options below this field allow you to define the most general principles of how the selected action should function in Sales-n-Stats:

- If you want the selected action to appear in the visitor's popup (the menu displayed when you right-click on the visitor's badge) for quick access, select the 'List this action in visitor's popup' check box.

- If you do not want the action to be recognized by Sales-n-Stats system, leave the 'Enable this kind of actions' check box clear.

- If you do not want to save the values of the action fields for the selected action in the database, leave the 'Save this kind of action in the database' check box clear.

Note: In this case the selected action will not appear in the list of actions in a Visitor's profile, but the reaction to an action of this type will be executed anyway.
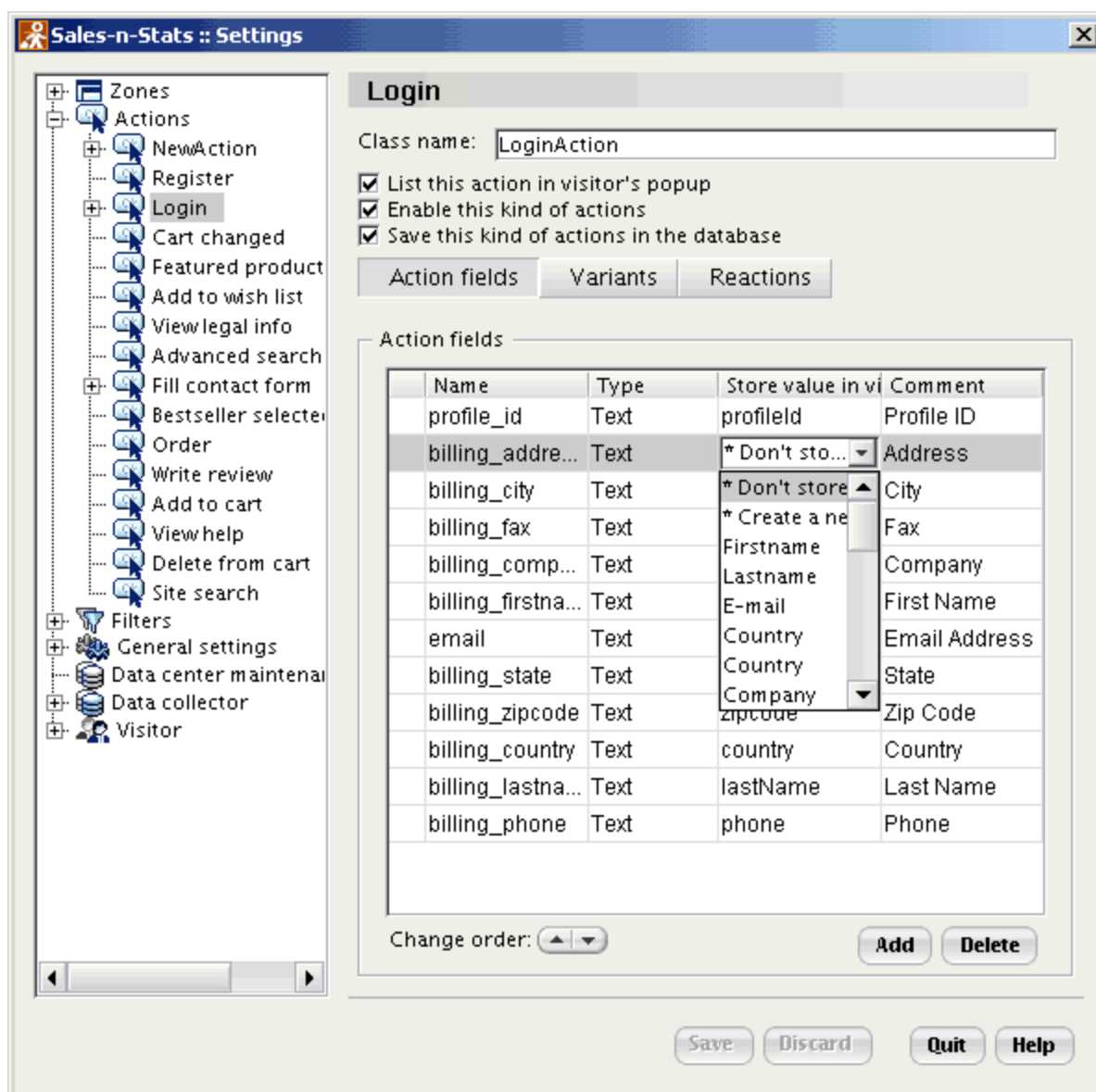
'Action fields' edit dialog

Editing action fields

Each action performed by a visitor at your website and recognized as such by Sales-n-Stats is characterized by certain parameters. These parameters are stored to action fields (visible as parameters' names and values in the 'Actions' area of the 'Visitor's Profile' dialog. See the chapter 'Managing the Visitor's Profile'->'Actions' 98 for more info).

While the values stored to action fields characterize actions, some of these values can be chosen to characterize not only an action, but the visitor in general (For example, the email address with which a user

logs in may be chosen as the visitor's email address shown in his profile). The action parameters which you want to use as visitor parameters should be assigned to appropriate Visitor's Profile fields (visible in the 'Visitor's profile' area of the 'Visitor's Profile' dialog. See the chapter 'Managing the Visitor's Profile'->'Visitor's profile' 96 for more info).

If you use the default **X-Cart-** or **LiteCommerce**-oriented action settings, please be aware that the default Visitor's Profile fields used in the Visitor's Profile already have some action parameters assigned to them. The 'Action fields' table displays not only the names of the action fields to which the parameters characterizing the selected action are stored, but also the names of Visitor's Profile fields to which the same parameters are written as visitor parameters. The 'Name' column of the 'Action fields' table shows the names of action fields, the 'Store value in visitor field' column shows the names of the corresponding Visitor's Profile fields to which the parameters are stored. *Don't store* opposite an action field name shows that the action field is not assigned to any Visitor's Profile field.

To change the way in which action fields are assigned to Visitor's Profile fields:

Click on the table cell in the 'Store value in visitor field' column opposite this action field and use the drop-down list to select:

- **one of the Visitor's Profile fields**, for parameter to be stored in that Visitor's Profile field;

- ***Don't store***, if you do not want the parameter to be stored to any Visitor's Profile field;

Note: Selecting *Don't store* does not prevent Sales-n-Stats from collecting data about the action parameter: you will be able to see the parameter in the 'Actions' area of the 'Profile' section of the 'Visitor's Profile' dialog and in the visitor popup.

- **'Create a new field'**, to store the parameter in a Visitor's Profile field, but such a Visitor's Profile field has not been created yet.

When you change any action fields, they get marked with an asterisk. If you add any new action fields (for external actions), they get added with a plus sign. If you delete any fields, they get marked with a minus sign.

Important!

Any changes made to action fields need to be approved manually. If you see any of the marks listed above, it means you have some changes that still need to be approved. Click **Save** to apply the changes or **Discard** to cancel them.

Editing reactions

Most preconfigured actions don't have reactions. But if there are any among your default settings use the

'Reactions' section to adjust the system reactions settings:

1. Right-click the appropriate reaction and select **Edit**.

2. To change the conditions for each reaction in the 'Conditions' section, click 'Operations' to select an operation that the system will perform as the response to an action.

3. Click **Save**.

_____

See also:

Visitors' actions 79

Pre-configured actions 224

Creating actions 165

8.4.2 Creating actions

If the preconfigured actions don't meet the requirements of your business you can create your custom actions.

Select 'Actions' in the tree menu, click **Add** in the 'Actions' section on the right. Enter the new action name and click **OK**. New action settings edit dialog opens in the 'Action fields' section.

Defining action fields

Each action may have any number of fields where the system stores the information related to this action. A field is a part of a record reserved for a particular type of data. For example, logically, the 'Add to Cart' action can have such fields as 'productName' and 'quantity' to store information about the product name and the number of items placed in the shopping cart. These fields are associated with the action and are available for viewing when browsing a visitor's actions history.

Action fields can be added, modified or deleted. To add an action field:

1. Select **Actions** in the left-hand tree menu. Click **Add**. A new editable row appears (marked by a red asterisk).

2. Think of a system name for the new field and enter it into the empty input box in the 'Name' column. The name will be used to address the field within the system.

Note: An action field name can consist of letters a-z, A-Z, digits 0-9 and the underscore "_". The first character cannot be a digit. The name must be unique.

3. By default the type of data which can be contained in a field is **'Text'** but you can select a different type.

   • **Text** should be selected if you want the field to be able to contain textual data.

   • **Integer** should be selected if you want the contents of the field to be an integer value.

   • **Real** should be selected if you want the contents of the field to be a real number.

   • **Logical (yes/no)** should be selected if you want the contents of the field to be a flag value (the value of such a field may be either 'true' or 'false').

4. If you would like to create a new visitor profile field to store the action field value in it, select the **'Create a new field'** from the drop-down box in the 'Store value in visitor field' column.
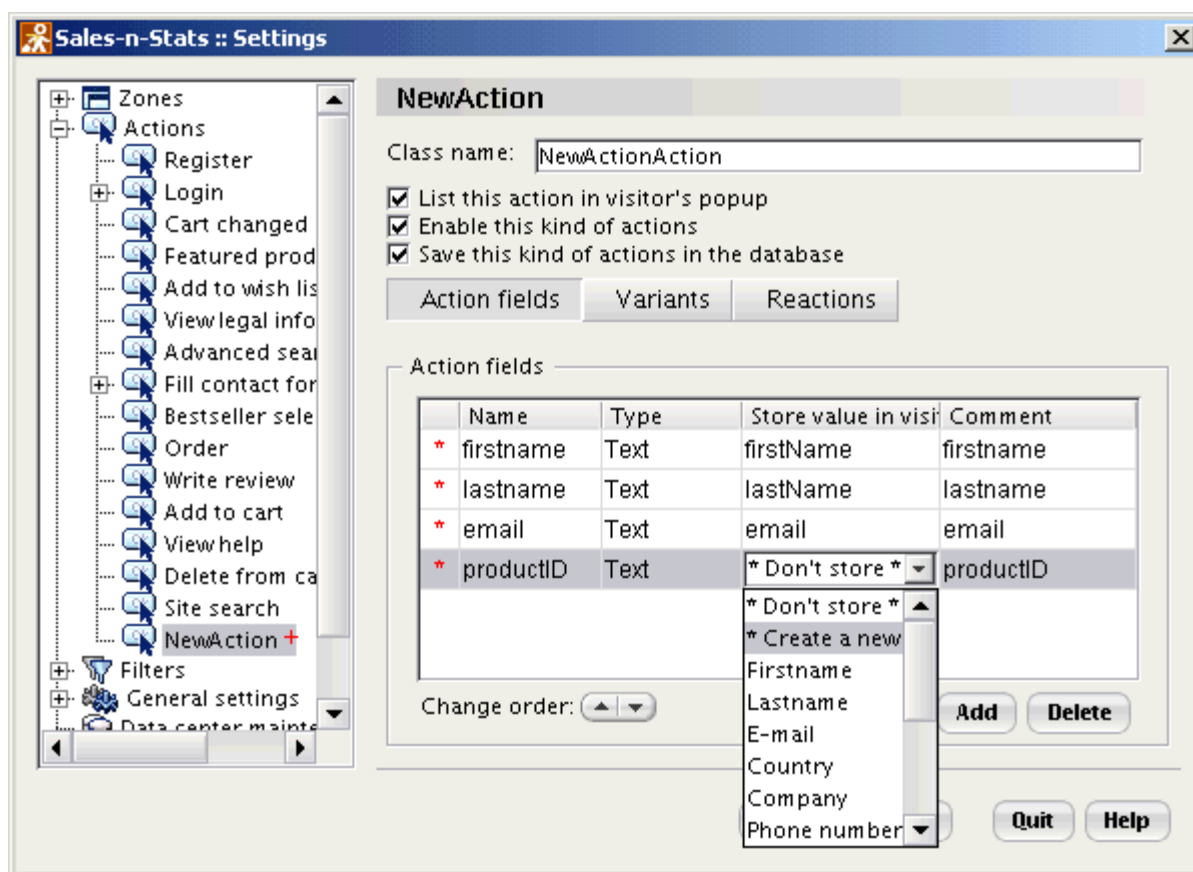
'New action' edit dialog: selecting 'Create a new field'.

5. Enter the new field name, select the type of value. If you want to save an action field value for each visit select the 'Store value for each visit' check box, select 'Show in Profile' if you want the action field value to be shown in the Visitor's profile.
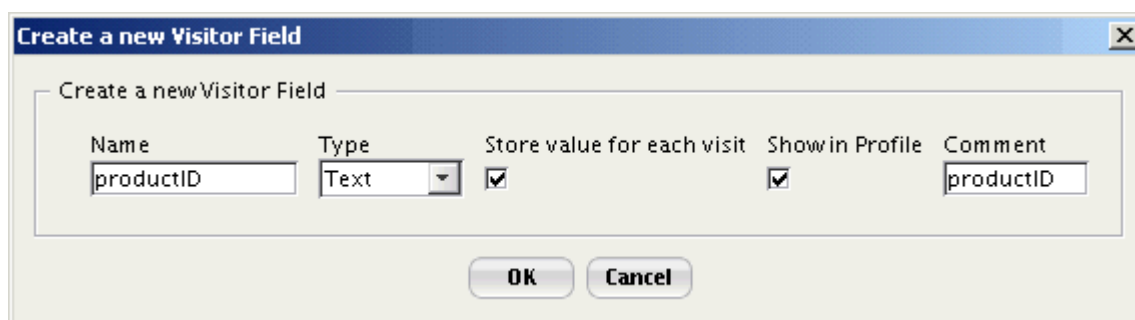
Creating a new visitor field.

6. If you don't want to save the existing action field value in the Visitor's profile, select **'Don't store'**.

7. Set the name by which you will recognize the field: click on the 'Comment' cell and enter the profile field

name into the input box that will appear.

To delete an action field select the necessary action field and click **Delete**.

Action variants

The Sales-n-Stats system gathers the necessary information about the visitors and their activity on the website via so called external actions. All preconfigured actions are external actions and do not have variants. But you also can add a pattern or a sequence of patterns (action variant) that will define what information to gather on the website yourself.

Action variant is a sequence of pageviews and form submits done by a visitor at your website. Each 'pageview' or 'form submit' is called an 'action step'. For example, the action 'Registration' may consist of 2 steps: registration form submit and displaying the 'Registration successful' page. Each action may have more than one variant. For example, if there are 2 registration forms at your site, short and verbose, both resulting in the same action – 'Registration'. However, it is more typical for an action to have only one variant. To define an action variant in the 'Variants' section, follow the next steps:

1. Right-click on the empty space of the 'Action variants' area in the 'Variants' section and select **New action variant** from the context menu.

2. 'Select action type' dialog opens (for your convenience we included the most frequently used action variants in the list).

3. Select the necessary action variant from the list and click **OK**.
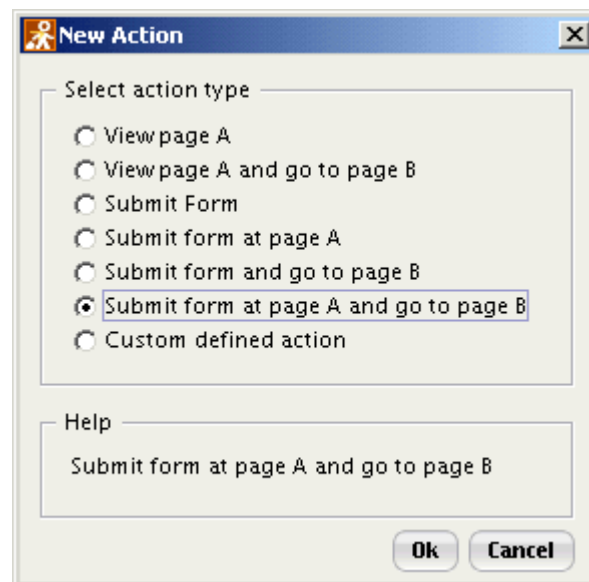
'Select action type' dialog

4. Enter the necessary URLs into the URL field or fields according to the action type. Click **Save.**

When you selected an appropriate action variant you should define action steps. Click on the ▣ button to adjust the action pattern settings.

Pattern edit dialog opens. It consists of two sections:

- **'Identify by'** section where you define the pattern that is used to identify this action step.

- **'Store data'** section where you define which URL parameters or Form fields should be stored in the system when the action occurs.

Example

External action cannot be defined by a visitor's action on the site unlike other action variants. External action takes place only when a special event occurs. For example, an external action 'Order' takes place in two cases:

1. when a customer submits an order, or

2. when a site administrator processes an order manually.

An external action is recognized when the information about this action is entered into the database through the Sales-n-Stats integrator built into your shopping cart.

All action variants may include two types of patterns: 'Page View pattern' and 'Form submit pattern' or a combination of these patterns. For example, **Submit form and go to page B** action variant consists of two action steps 'Submit form' ('Form submit pattern') and 'Pageview' ('Page View pattern').

'Action Steps' edit section

Pageview pattern and data capturing

There are two options in the 'Identify by' section, that can be used to identify a pageview: 'URL pattern' and 'SPAN tags'.

'URL pattern'

Enter an appropriate URL pattern to identify pageview by its URL. The syntax of the patterns is similar to zone patterns and is described in the 'Setting up zones' [182] section.

Note: The default pattern http://*/* contains all site pages.

'SPAN tags'

A pageview can also be identified by the presence of specially formatted HTML tags (SPAN tags) in the body of HTML page. Go to the 'Span tags in the body of HTML' section to add the necessary parameters. Span tags can be used if it is impossible to identify pageview just by specifying a URL pattern.

'Pageview pattern & data capturing' dialog

Examples

Example 1.

You embed the following tag in your HTML page:

```
<SPAN ID="sns_user_status">registered</SPAN>
```

and then specify the 'sns_user_status' as a span tag name and 'registered' as a span tag value. This pattern will match when there is SPAN tag with the name 'sns_user_status' and value 'registered' in the body of HTML page.

Example 2.

There is the following tag in your HTML page

```
<SPAN ID="order_total">99.5</SPAN>
```

where 'order_total' is a span tag name and '99.5' is a span tag value. This pattern will match where there is a SPAN tag with the name 'order_total' and value '99.5' in the body of HTML page.

To create a new parameter:

1. Click **Add**. 'Create a new parameter' dialog opens.

2. Enter the parameter name and its value into the corresponding fields.

3. Click **OK**.

The 'Store Pageview data' section allows you to define Form action parameters or SPAN tags which values you are going to store in the action fields. Form action parameters are the parameters which are located in the URL after the "?" sign. Click on **Add** to create a new row. 'Create a new Row' dialog opens, enter "Form action parameter" or "Span tag name" and select from the drop-down list an appropriate action field where you want to store the value of "Form action parameter".
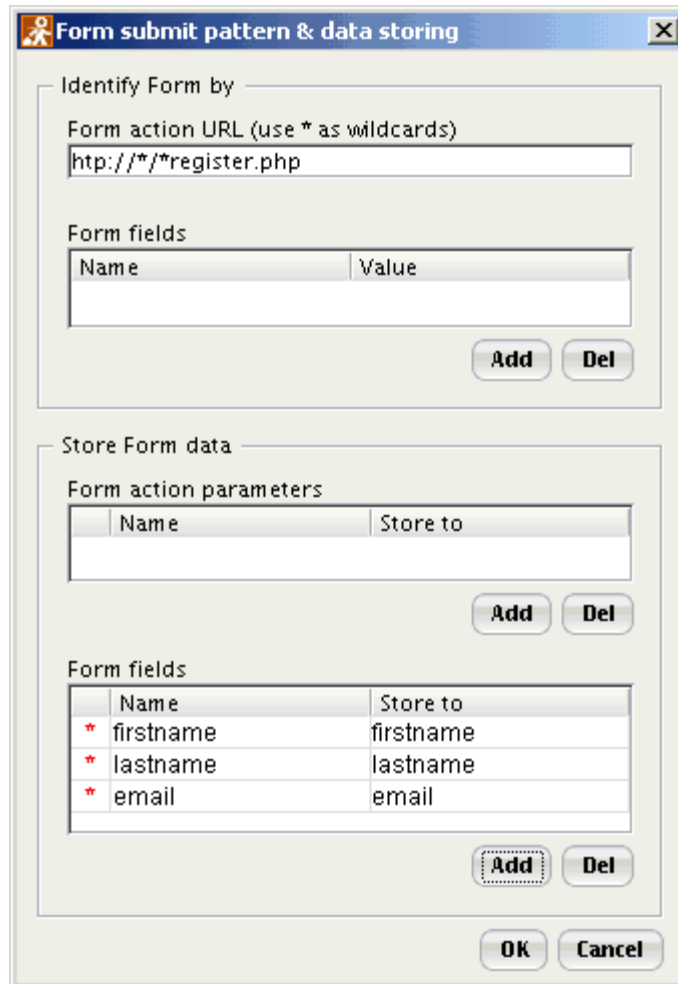
You also can create a new action field:

1. Add a new row in the 'Form action parameters' section;

2. Select **Add new Action Field**. 'Create new Action Field' dialog opens.

3. Enter new action field name;

4. Click **OK**.

To delete a parameter select the one you would like to remove and click **Del**. Click **Cancel** to exit without changes.

Form submit pattern and data capturing

There are two options in the 'Identify Form by' section that can be used to identify a form submit: 'Form action URL' and 'Form Fields'.

'Form submit pattern & data capturing' dialog

Form action URL

It is the pattern that identifies URL where the HTML form is submitted to. The syntax of the patterns is similar to zone patterns and is described in the 'Setting up zones' [182] section.

> **Note**: Please do not confuse form action URL with the URL where the form is located. To determine what the Form action URL is you should look into HTML code of the page: <FORM method="post" action="**http://www. example.com/script.php**"> The bold type text is the form action URL that identifies where this form is submitted to.

Form Fields

To identify a form submit Sales-n-Stats analyzes the set of form fields and sometimes their values. A form can also be identified by invisible fields which do not show in the browser, but are still present.

To add a form field:

Click **Add** button to create a new parameter. Enter the form field name and its value. In most cases form field value will be *. To delete a parameter select the one you would like to remove and click **Del**. In the 'Store Form data' section you define the 'Form action parameters' or 'Form fields' you want to save in the action fields:

1. Click **Add** to create a new row. 'Create a new Row' dialog opens.

2. Enter Form action parameter name or Form field name.

3. Select an appropriate action field from the drop-down list where you want to store the value of the 'Form action parameter' or the 'Form field'.

You can also create a new action field that will automatically appear in the 'Action fields' section.

To add a visitor field, follow the next steps:

1. Add a new row in the 'Form action parameters' or in the 'Form field' section.

2. Select **'Add new Action Field'.**

'Create a new Row' dialog

3. 'Create a new Action Field' dialog opens.

Creating new action field that will appear in the list of existing action fields in the 'Action fields' section.

4. Enter new visitor field name, select the type and where you want to store the action field value.

5. If there is no appropriate visitor field in the 'Store To' drop-down list, select ***Create a new field*** to create one.

6. Fill in the 'Comment' field if necessary. Click **OK**.

To delete a parameter select the one you would like to remove and click **Del**. Click **Cancel** to exit without changes.

Adjusting system reactions

Reaction is an optional response of the system to a visitor's action executed on your site. There can be several reactions associated with each action. There are several types of reactions, for example, Push content, Post Message, Execute external program etc. To add a reaction click on the **Reactions** button. 'Conditions' dialog opens.

Setting Conditions

The 'Conditions' section is not necessary and allows you to configure conditions for triggering system reactions. There are two options in the 'Conditions' section to set those conditions that are necessary for the fulfillment of each reaction. If the reaction should be executed unconditionally leave 'Conditions' window blank.

To add conditions:

- Click **New row** to add a condition row.

- Click on the [...] button and choose the necessary property from the popup menu. You will see an expression entered into the field that appeared after you started the condition row. Then select an appropriate sign of relation (=, <,>, =, =,) in the next field of the same condition row. If you select 'matches' you can create your own condition pattern using (*) instead of any element in a row. The last field in the condition row is meant for a textual or numeric value with which the actual value of a reaction property will be compared.

For example, setting conditions for the 'Add to Cart' action you choose **action.productName** property from the popup menu and then select 'matches'. In the next field of the row enter the following pattern: *CD*, where * is any element or elements (in the product name there can be any number of letters or figures in the * position).

To delete the condition click **Remove** next to it.

'Condition' edit dialog: visual editor

Use 'Macro mode' only if you possess some programming skills! Select the 'Macro mode' check box and enter the necessary condition parameters with the help of macro language. Using macro language you can set more complex and exact conditions than those you set using the visual editor.

Note: All conditions set in the visual editor can be seen when you select the 'Macro mode' check box.

To check if you entered the right parameters, click **Check macro**. If there is a mistake in the macro language the system displays the warning message.

'Condition' edit dialog: using macro

Adjusting Operations

To specify what operations the system executes as a reaction click on the **'Operations'** button. Then click **Add** and select the necessary operation from the drop-down list. You can set more than one operation and organize their order for the reaction.

- **Push URL** - to direct a visitor to URL.

- **Push content** - to send an optional content to a visitor.

- **HTTP request - t**o send the information about the action to other web application.

- **External execution** - to run the program (for example: .exe).

- **Macro execution** - to execute macro code.

- **Notify operator** - to send a message and a sound file to an operator.

- **Post message -** to post a message in the Visitor's profile.

Sales-n-Stats cannot generate reactions while the Operator Terminal (or Data Center in the Enterprise edition) is not running. Select the 'Postpone operation if Sales-n-Stats is offline' check box so that the reaction will take place when the Operator Terminal is launched. If the check box is not selected and Sales-n-Stats is not running; there will be no reaction when the action takes place.
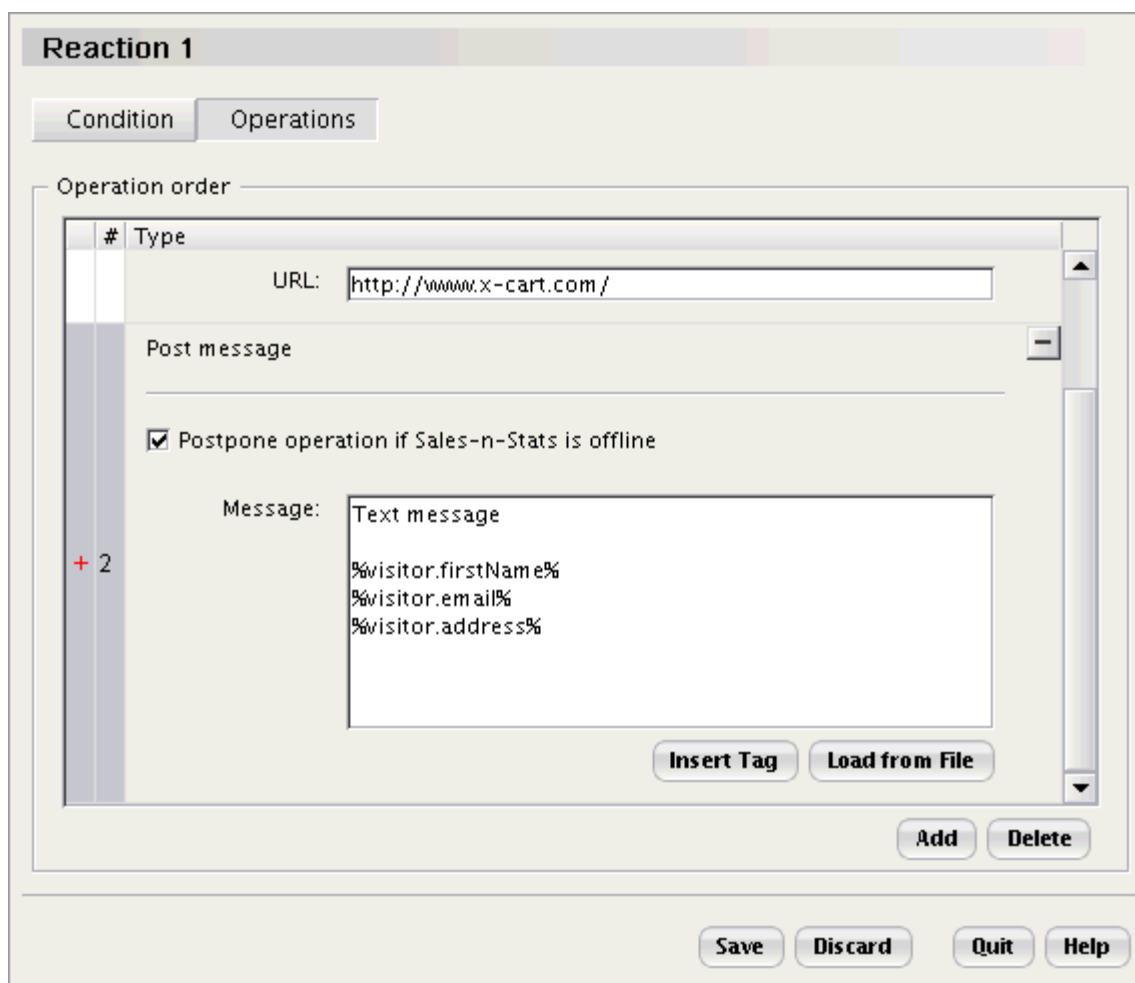
Reaction operations edit dialog

To remove a reaction select it and click **Delete**.

___

See also:

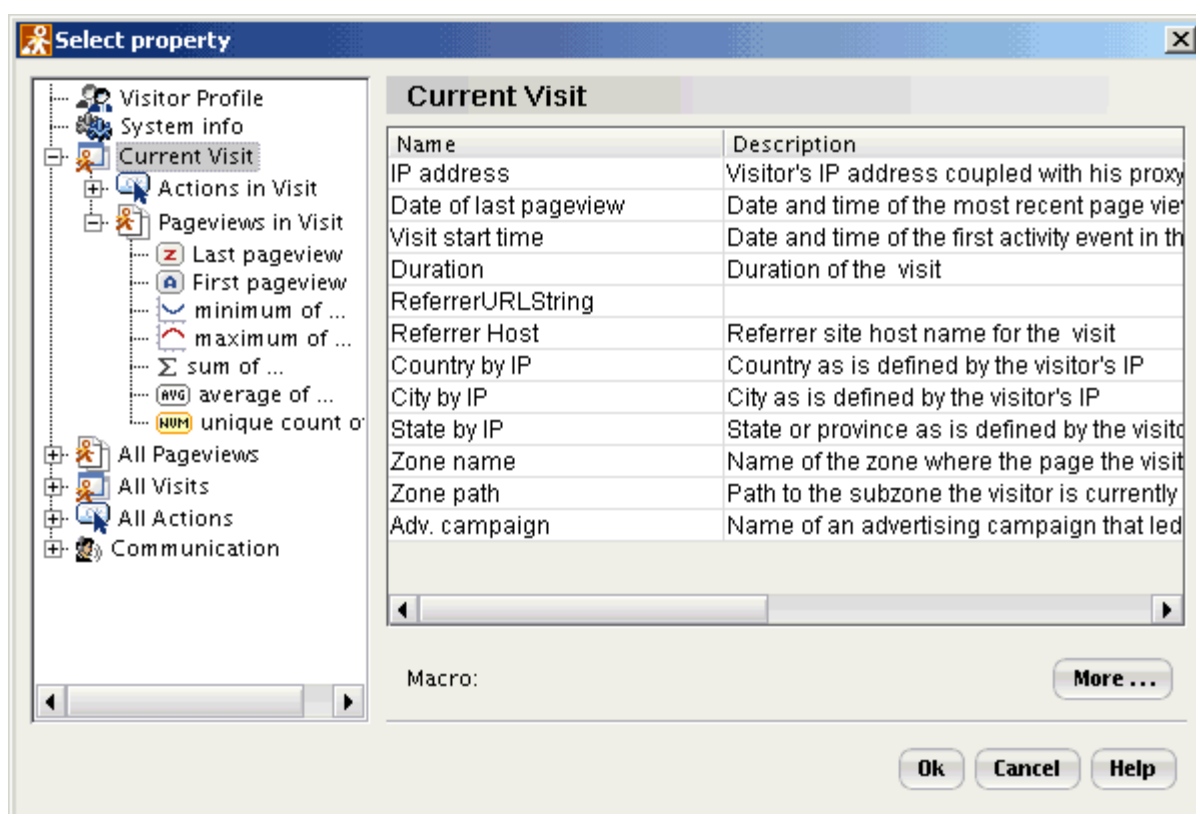*Visitors' actions* 79

Using preconfigured actions 161

8.5 Property Selector

Property Selector is an explorer providing access to database properties stored in the system, which are arranged in a tree menu.. It is displayed every time you need to select a property. It opens in a separate dialog and lets you find and view properties that belong to different groups. It also provides the detailed description of each property.

Use Property Selector to choose the visitors' characteristics that will be displayed on a visitor's badge, in the conditions or in reports.

Property Selector allows you to:

- define what data to display on a visitor's badge;

- define display conditions for a visitor's badge;

- configure conditions for Filters;

- configure conditions for triggering system reactions (refer to the 'Adjusting system reactions' section);

- build reports with the help of the report constructor (refer to chapter <u>'Creating reports'</u> 134).

'Select property' dialog

The 'Select property' dialog consists of two sections: the tree menu of the groups of properties (such as Visitor's Profile, Current Visit, All Pageviews, All Visits, All Actions, Communication) and the list of property names and their descriptions.

The following groups are available in the property selector:

- **Visitor's Profile** provides access to the fields that are defined in the **Visitor -> Badge Setup** menu including the system built-in fields.

- **Current Visit** consists of two sections:

  - **Actions in Visit** provides the information about the actions executed by a visitor during current visit.

  - **Pageviews in Visit** provides the information about pages viewed by a visitor during current visit.

- **All Pageviews** provides information about all pages viewed by a particular visitor.

- **All Visits** stores information about the history of visitor's access to the website.

- **All Actions** contains information about actions done by visitor. All actions defined in the system appear in this menu.

- **Communication** provides access to the information about the visitor's text chats, voice calls, messages, etc.

All groups except 'Visitor's Profile' and 'Active chat' contain the same set of properties that characterize this block of functions.

They are:

- **Last -** the last object in the collection (e.g. Last Visit start time; Last Pageview URL)

- **First** - the first object in the collection (e.g. First Order ID)

- **Count** - counts objects in the collection (e.g. number of all visits)

- **Minimum of -** the minimal value of the object's field in the collection (e.g. minimum of visit duration)

- **Maximum of** - the maximal value of the object's field in the collection (e.g. maximum of visit duration)

- **Sum of** - the sum of the values of the specified field (e.g. Sum of Order Total)

- **Average of -** the average value (e.g. average of all visits duration – average time that the visitors stay at your site)

- **Unique count of** - the count of unique elements in collection (e.g. the number of countries from which you have visitors; the number of different order IDs in one visit).

Note: The 'minimum of', 'maximum of', 'sum of', 'average of' blocks can only be applied to numeric fields.

The **More** button provides access to more specific system properties. Use this popup menu only if the scope of the Property Selector settings does not fully satisfy your requirements.

See also:

Setting up the Visitor's Badge 206

Creating reports 134

8.6 Setting up zones

The zones needed for work in Sales-n-Stats can be easily set up, edited and deleted via **Main Menu->Tools->System settings->Zones**.

All non-classified pages of your website primarily belong to one zone named 'Default zone'. When you create zones of your own, pages are taken away from this zone and added to the zones you create (for example, 'Catalog', 'Cart', 'Checkout'). Every site page can belong to only one zone, so pageviews that take place in some zone you defined are no longer counted in the 'Default zone'. Larger zones can have subzones (for example, to pay particular attention to a certain product category, say 'Books', create a separate subzone 'Books' within the zone 'Catalog' which includes all of your product pages). Pageviews that take place in a subzone are excluded from the main zone.
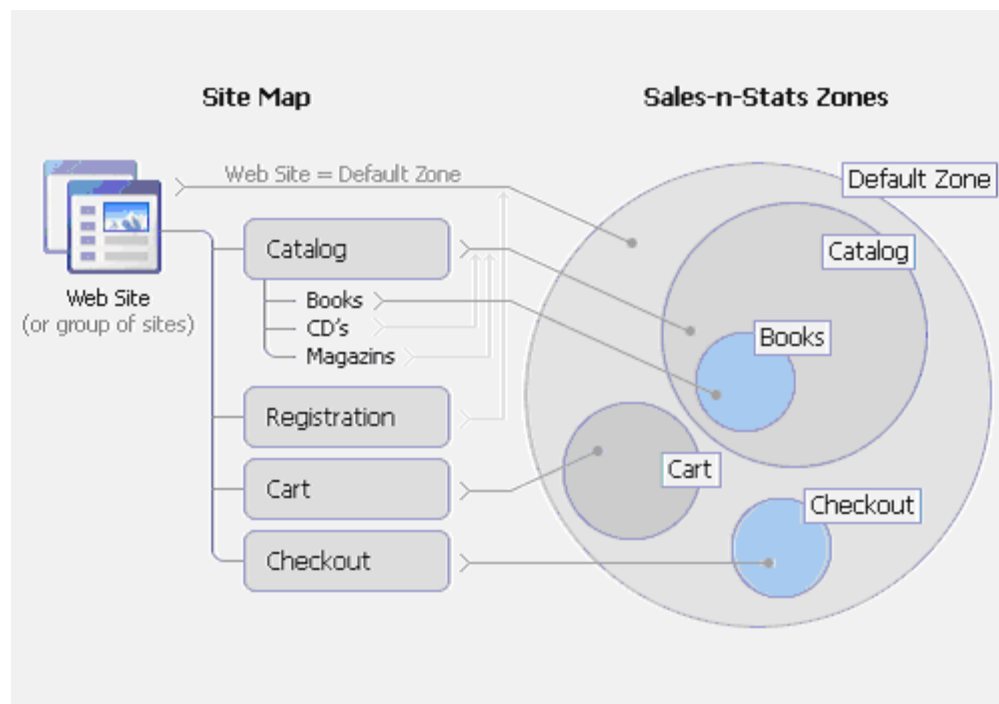
Site zones scheme

The package for integrating Sales-n-Stats with shopping carts allows you to import shopping cart-specific zone settings. If you do so, the zones of your site will be named 'Default zone', 'Catalog', 'Product info', 'Cart', 'Checkout' and 'Help & Legal'. If the imported zone set does not exactly meet the requirements of your business, modify the initial zone settings. For example, add more zones, delete the zones you do not want to monitor, rename zones and change the page range included into each of the zones.

If you go to the 'System settings' section and click on the '+' box next to 'Zones' in the tree menu, you will see all the zones of your site nested within the 'Zones' folder. Subzones are nested within zone folders.

The dialog section to the right of the tree menu demonstrates the settings of the zone currently selected in the tree menu. Selecting the root level 'Zones' allows you to view the settings of the 'Default zone'.
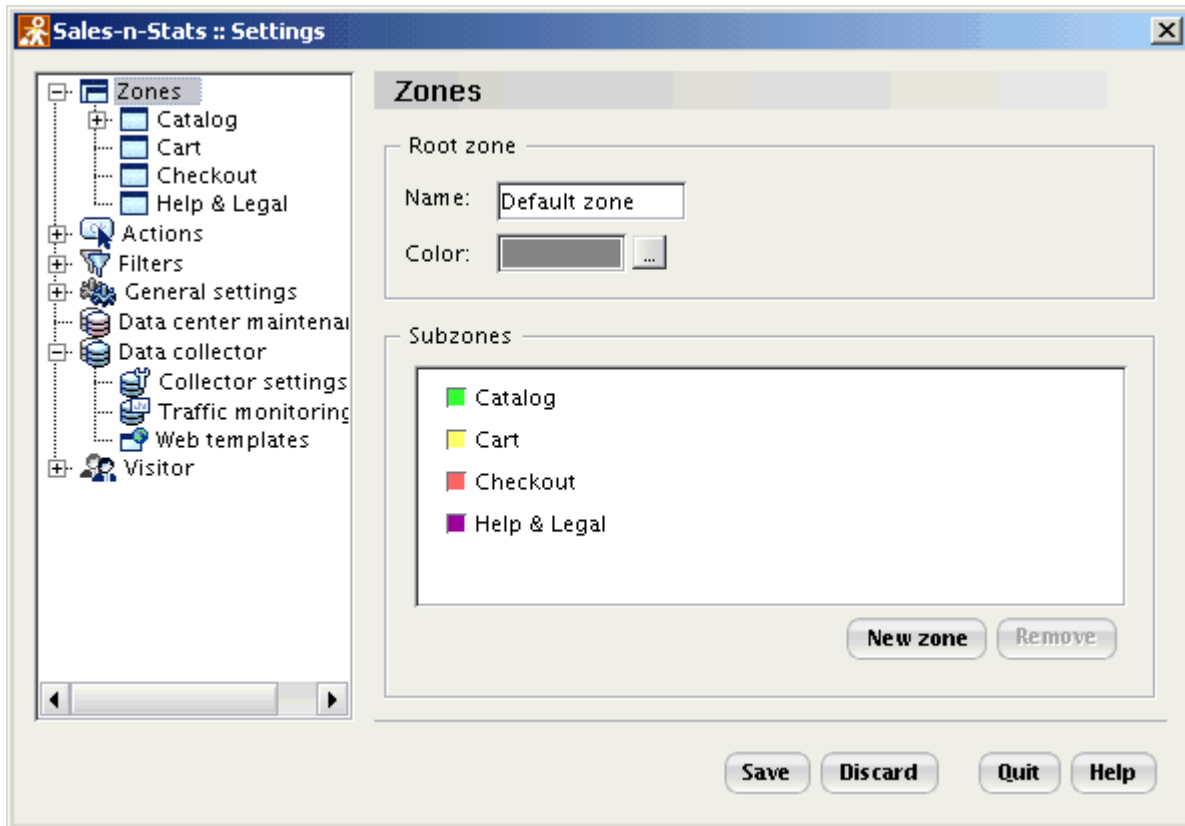
Site zones in the 'System settings' dialog.

Any zone/subzone in Sales-n-Stats is characterized by a name (needed for the zone button and the zone window title bar) and a color (appears in the zone window color bar to help you distinguish it from the other zones). The name and the color of the zone selected in the tree menu can be seen in the upper part of the dialog pane.

The 'Patterns' section defines the page range included into the selected zone (Refer to 'Defining zone patterns' [186] for more information).

The lower part of the dialog ('Subzones' area) shows the subzones of the selected zone (if any).

Dividing your site into zones

You can set up as many zones in a site as you want but we recommend you keep the number of zones within the limits of reason. Considering the fact that an average person can keep in the span of attention 5-7 objects, the average number of zones monitored by an operator should be the same. Probably not all the sections of

your site are equally important, so we do not recommend to create more zones than is absolutely necessary.

As to the content of your zones, again, it depends on what is convenient to you and what kind of information about your visitors' behavior on the site you want to get.

The basic set of zones for an e-commerce website is probably the following:

- **Default zone** (all your website pages if they are not ascribed to other zones);

- **Catalog** (all the pages on which products can be viewed);

- **Product info** (the pages where the customers can see the details about all the products in Catalog);

- **Cart** (the page where the customers can see and manage the contents of their shopping carts);

- **Checkout** (the page(s), where the customers can choose the shipping and payment methods for their orders and provide their payment details).

- **Help, Legal** (help and other useful information).

Use this set of zones as is or set up zones of your own depending on the structure of your site.

Sample zones

After you finish using Quick Start and begin adjusting Sales-n-Stats to work with a real website, your Web control and communication center retains the zones it used for Quick Start demonstration of how zones work. These sample zones are Quick Start oriented and cannot be used for monitoring a real site. You need to remove the sample Quick Start zones and create some new zones in Sales-n-Stats that will represent the zones of your actual site or import the prepared zones from the existing file.

In practice, creating zones in Sales-n-Stats boils down to naming the zones and telling Sales-n-Stats where they are, which means just providing the system with the URL addresses of the pages which should be included into this zone. You do not have to enter all the URLs manually one by one: the location of a site zone may often be described by a pattern covering several URL addresses.

Creating zones

To add a new zone:

1. Do one of the following:

- Click on 'Zones' in the tree menu, then click **Add**.

- Right-click on 'Zones' in the tree menu, select **New zone** from the context menu.

2. Think of a name for the zone and enter it into the input box that will appear. Click **OK**.

Now you need to specify the necessary zone settings.

3. Select the zone color: click on the ⬚ button next to the 'Color' field and choose a color from the dialog box that will appear. Click **OK**.

4. Define the page range that should be included into the new zone:

   a) Click **Add**.

   b) Enter a pattern describing the location of pages that should be included into the zone (Refer to 'Defining zone patterns').

   c) If necessary, repeat steps a-b to add more patterns.
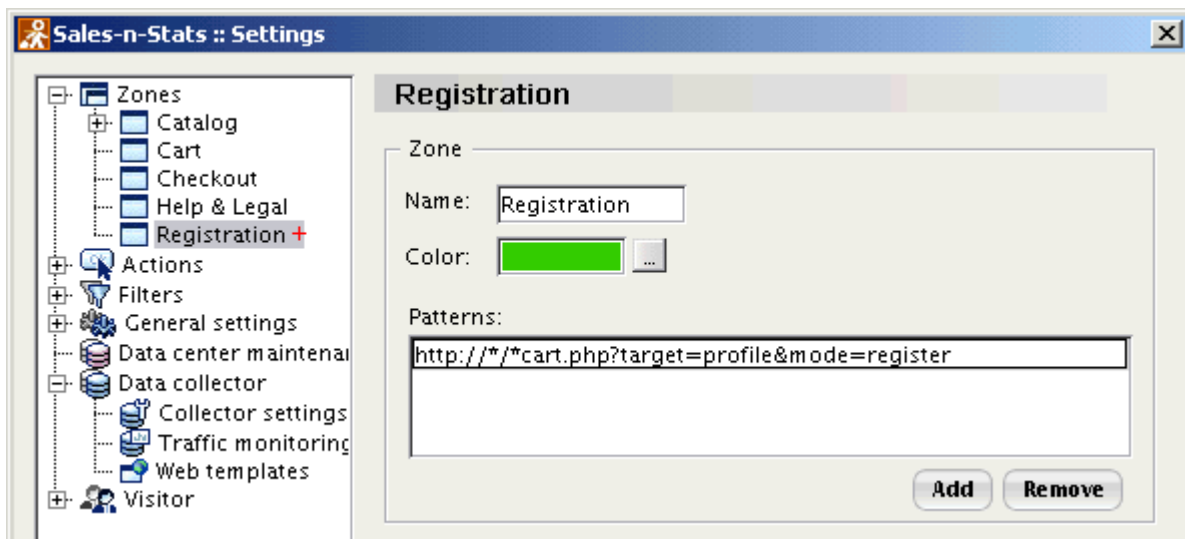
A pattern for the zone 'Registration' has been set.

5. To remove a pattern, select the pattern line and click on **Remove**.

6. Click **Save** to apply the changes.

Note: Before you click **Save**, you can cancel any changes by clicking **Discard**.

Creating subzones

To create one or more subzones in a zone:

1. Select the zone in which you want to create a subzone.

2. Right-click in the 'Subzones' section and select **New Zone** from the context menu, or click **Add**.

3. Think of a name for the subzone and enter it into the Input box that will appear. Click **OK**. The subzone name will be added to the tree menu with a red plus sign. Now you need to specify the zone settings.

4. Select the subzone color.

5. Add one or more patterns.

6. Click **Save** to apply the changes. The red plus sign will be removed.

Note: Before you click **Save**, you can cancel any changes by clicking **Discard**.

Defining zone patterns

Describing the location of a zone boils down to providing the system with a list of URLs that should be included into the zone. However, this hardly seems feasible if your site is large. That's why Sales-n-Stats is capable of using **'patterns'**. A pattern is an expression that allows you to describe the location not only of a specific web page, but of a group of web pages with similar URLs. When page URLs differ but slightly, there is no need to enter each URL separately: all you need to do is make up a pattern that will cover the whole page range.

If you are using a predefined set of zones you obtained with the integration package, all the zone patterns are already defined. However, if necessary, you may edit these patterns, remove unnecessary patterns or add patterns of your own (this, of course, will change the page ranges of your zones).

URL patterns

Mind that the structure of a pattern must precisely match the structure of the URL that you want to be identified by this pattern. You should be careful defining patterns to cut off unwanted URLs.

No matter whether you are creating a pattern from scratch or just modifying an existing pattern, you should keep in mind that patterns use a special syntax.

The asterisk * is a wildcard character that matches any number of characters, including none. The default pattern *://*/* matches any URL. Any other patterns can be formed on the basis of the default pattern by modifying the portions that matter for identifying a particular URL/set of URLs. For example, the pattern http://*/ *?mode=* matches any URL that contains a parameter 'mode' with any value; the pattern http://*msn.com matches any URL whose host name ends in 'msn.com', like http://www.msn.com or http://msn.com.

The dollar sign $ anchors the expression to the end of the target string. When this sign appears as the last character of the pattern expression, Sales-n-Stats "understands" that the end of the URL included into a zone must be the same as the pattern expression. For example, if you set the pattern for a certain zone as http:// example/xcart/home.php$, the only page that will be included into this zone will be http://example/xcart/home.

php, while the URLs http://example/xcart/home.php?cat=3 or http://example/xcart/home.php?cat=26 will not.

Here are some examples that demonstrate how pattern syntax affects the results:

pattern	matches	doesn't match
http://*/*/cart.php? target=checkout	http://host/lc/cart.php? mode=abc&target=checkout	http://host/lc/cart.php
http://msn/*?mode=*	http://msn/lc/cart.php?target=help&mode=abc	http://msn.com http://msn/lc/cart.php?target=help&mode
http://msn/*?mode	http://msn/lc/cart.php?mode	http://msn/lc/cart.php?mode=abc
http://msn/*?mode=*$	http://msn/lc/?mode=abc	http://msn/lc/?target=help&mode=abc
http://*/*/cart.php	http://host/~leo/cart.php?target=product http://host/cart.php	http://host/acart.php http://host/cart
http://*/*/shop/*	http://host/~leo/shop http://host/~kvd/shop/index.html http://host/shop	https://host/shop
:///*	any URL	—

Adding a new pattern

Click **Add**. A new line will appear inside the 'Patterns' box with the default pattern http://*/* in it.

1. Enter the necessary pattern (either modify the default pattern or remove the default pattern altogether, copy the URL of a site page and paste it into the pattern box using the key combination of '**Ctrl+v**').

2. If the added pattern does not cover all the pages that should be included into the zone, add more patterns (repeat steps 1-2).

3. Click **Save** to apply the changes.

To edit an existing pattern, double-click on it, modify the pattern and click **Save**.

To delete a pattern select the pattern, click **Remove** and click **Save** to apply the changes.

Renaming a zone

Right-click on the name of the zone (either in the tree menu or in the list of zones in the 'Zones' section).

1. Select **Rename** from the context menu. 'Rename zone' input box will appear.

2. Enter a new zone name.

3. Click **OK**. The name of the zone in the tree menu and the 'Name' field in the zone settings will be updated. A red asterisk (*) sign will appear next to the zone name in the menu to signify some changes have been made.

4. Click **Save** to apply the changes. The red asterisk will be removed.

Editing a zone

Click on the name of the zone you want to edit in the tree menu or right-click on the appropriate zone in the tree menu and select **Edit** from the context menu.

1. Make the necessary changes and click **Save**.

Deleting a zone

Right-click on the appropriate zone in the tree menu and select **Remove** from the context menu or click on 'Zones' in the tree menu, select the necessary zone in the list of zones and click **Remove**.

1. Click **Save**.

See also:

Zones 71
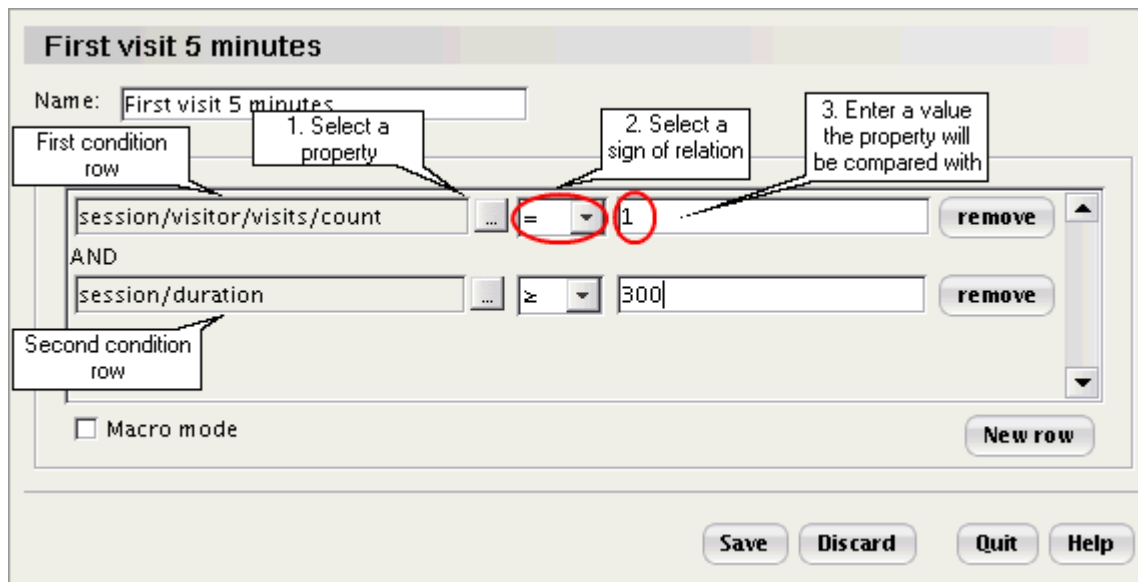
8.7 Managing filters

Filters allow you to see only specific groups of visitors on Site Monitor. Such groups can be existing customers, visitors having some items in their shopping cart, visitors browsing a specific area of your website, etc.

Manage your filters via **Main Menu->Tools->System settings->Filters**. Sales-n-Stats provides you with a set of preconfigured filters (refer to the 'Filters' |76⌐ section) to use for effective work with visitors. Modify and delete these filters if necessary. If the preconfigured filters do not meet your requirements, create your own filters.

Creating a filter:

1. Go to the **System settings->Filters** section.

2. Right-click on the empty space in the 'Filters' section and select **'New filter'**, or click **Add**. An input box will appear.

3. Think of a name for the filter being created and enter it into the input box. Click **OK**. The new filter gets added to the set of filters in the tree menu with a red plus sign. The 'New Filter' settings section opens.

4. Click **New row**. Two empty fields appear. Click on the ⌐...⌐ button and select a necessary property using the Property Selector. Choose the necessary sign of relation from the drop-down box in the middle and enter a textual or numeric value with which the actual value of a visitor property will be compared into the third field.

The condition in the second row has been set: the duration of the current visit to the site must be equal or more than 300 seconds (5 minutes).

If necessary, add more condition rows: click **New row** and complete the fields that will appear in the way described above.

Note: Multiple condition rows are joined by the logical operator **AND**. This means the filter will be applicable only to the visitors who satisfy the conditions set in all the condition rows of the filter at the same time.

5. Click **Save** to apply the changes. The red plus sign next to the name of the filter in the tree menu disappears.

Note: The **Discard** button can be used to cancel any changes before you click **Save**

Editing a filter:

Go to the **System settings->Filters** section. Double-click the filter you want to modify. Edit the name of the filter, the conditions or add more condition rows. Click **Save**.

Renaming a filter:

Go to the **System settings->Filters** section. Right-click on the filter name and select **Rename** from the context menu. Edit the name of the filter and click **OK**. The name of tshe filter in the 'Filters' section will be updated. Click **Save**.

Deleting a filter:

Go to the **System settings->Filters** section. Select the filter in the 'Filters' section and click **Remove**. The name of the filter will be marked by a red minus sign. Click **Save**.

See also:

Filters 76

8.8 Data Center maintenance

'Data Center maintenance' section allows you to view and manage information about the number of events (pageviews and visits) which took place on the monitored site and the number of visitors that came to your site. It is available via **Main Menu->Tools->System settings->Data Center maintenance**.

According to your needs, you can view a) the data collected and saved in the database since the moment the system was installed ('Data Center maintenance'); b) data for a certain time period ('Summary for the period' subsection).

'Data center maintenance' dialog

The section provides some controls that allow you to export information from the database to a file, import information to the database or purge information from the database as needed.

Exporting data

To export all the data contained in your current database (pageviews, visits, visitors, actions, chats and messages) click on the **Export All** button. Enter a name for the export file into the 'File Name' field. Click **Save**. The data will be saved to an *.snd file.

Importing data

If you already exported your data in the way described above and have an *.snd file, you can restore your data by re-importing the file into Sales-n-Stats. Click **Import,** select the necessary *.snd file and click **Open**.

To import data from another collector you have to click **Import from another collector** to make sure all the data is imported correctly. For example, you need to use this functionality when moving to another hosting.

Removing data

To remove all statistical data from the database:

1. Click **Purge All**. A warning message appears.

Warning message: confirm before removing all data from the database

2. Click **Yes** to confirm. The 'Purge' dialog will be opened.

The 'Purge' dialog: selecting data you want to remove

3. Do one of the following:

- Click the **Pageviews&Profiles** button to delete all the information about pageviews and visitors.

- Click **Pageviews only** to purge the information only about pageviews.

- Click **Cancel** to exit without changes.

Summary for the period

The section 'Summary for the period' allows you to export, import or remove the data for a certain period of time. Specify the necessary period by setting the 'Start date' and 'End date' (specific time can be set in the format 'hours : minutes') to view the number of pageviews, visits and new visitors for a certain period of time. New visitors are those who made a first visit to your website during the specified period. Click **Refresh** to update the information.

To remove statistical data for a certain period:

Set the start and end date of the period. Click **Purge**. Select the data you want to purge.

To export all the data for a certain period:

1. Click **Export.** The 'Save' dialog will appear.

2. Enter a name for the export file into the field 'File Name'.

3. Click **Save**. The data will be saved to an *.snd file.

To export the data before you delete it:

1. Set the start and end date of the period.

2. Click the **Export&Purge** button. Select the type of data that you want to purge.

3. After the 'Purge' dialog is closed, enter a name for the export file into the 'File Name' field of the 'Save' dialog.

4. Click **Save**. The data will be saved to an *.snd file.

8.9 Data Collector

This section provides all the necessary tools for better adjusting Data Collector settings according to your purposes. You get access to the 'Data Collector' section via **Main Menu->Tools->System settings->Data Collector**.

There are several sections where you can manage Data Collector settings:

- Optimize Data Collector activity by editing the **'Collector settings'** section.

- Organize the process of fetching data from Data Center in the **'Traffic monitoring'** section.

- Use the set of templates in the **'Web templates'** section to change the look and feel of Sales-n-Stats on your site.
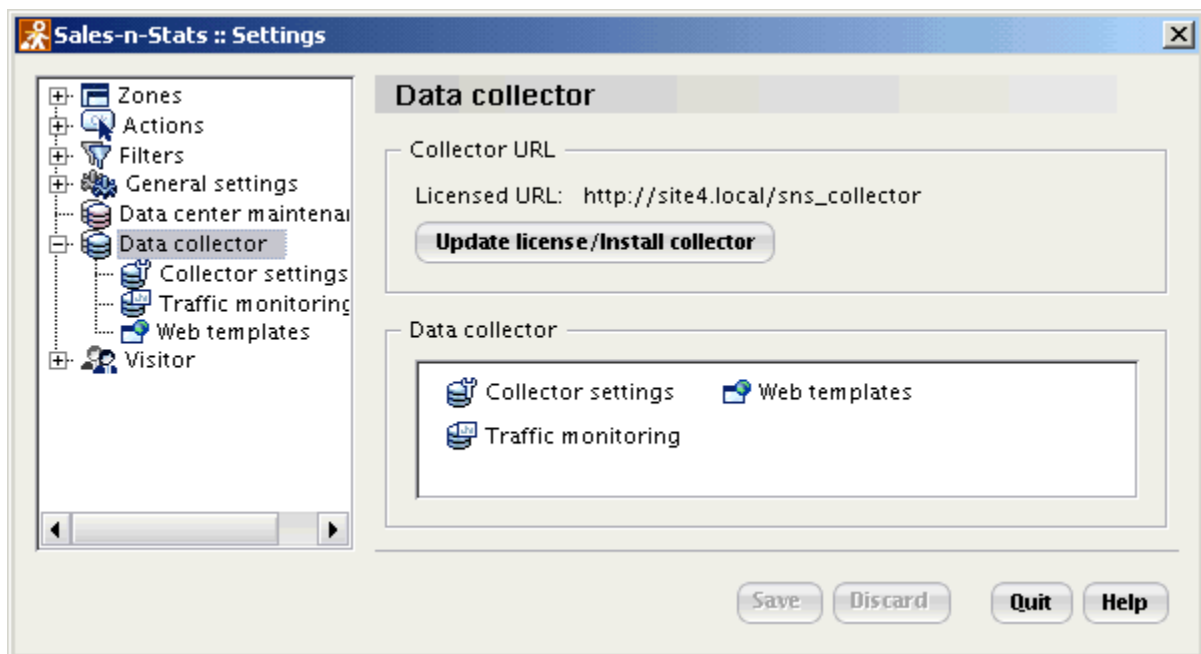
Data Collector setup main page

The main page of Data Collector settings section contains the 'Collector URL' section and the 'Data Collector' section. 'Collector URL' automatically shows the licensed URL, which you entered during the system installation.

If for some reason you want to re-install the collector or change its location, use the **Update license/Install collector** button. When the 'Update license' dialog opens, select **Continue** to start the installation. 'Installation Step 1.Defining Data Collector location' dialog opens. Then follow all those steps you took while installing

Sales-n-Stats.
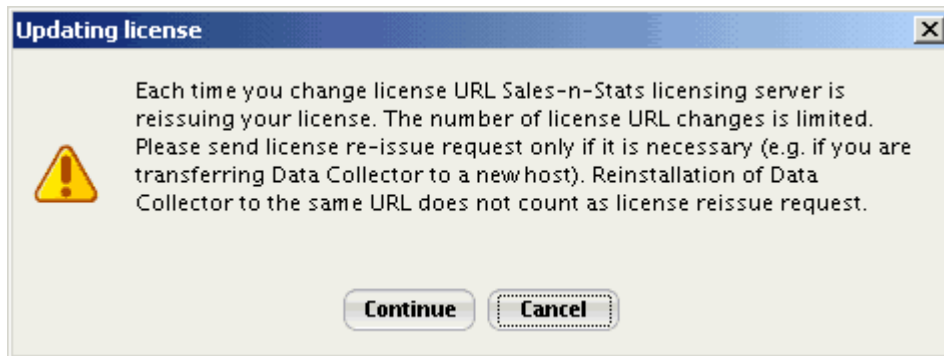
'Updating license' dialog appears as a notification before you reinstall Data Collector.

'Data Collector' consists of three sections from where you can get access to the settings dialogs - 'Collector settings', 'Traffic monitoring', and 'Web templates'.

Collector settings

To access 'Collector settings' section go to **Main Menu->Tools->System settings->Data Collector->Collector settings**. There is also a quick way to access the 'Collector settings' dialog via **Main Menu->Connection->Collector settings**.

All collector settings are set by default; however, for better Data Collector diagnostics you can modify some of the settings, for example, enter a log file name into the appropriate field, or select the 'Verbose' check box to get the detailed information of all Data Collector operations in a log file.
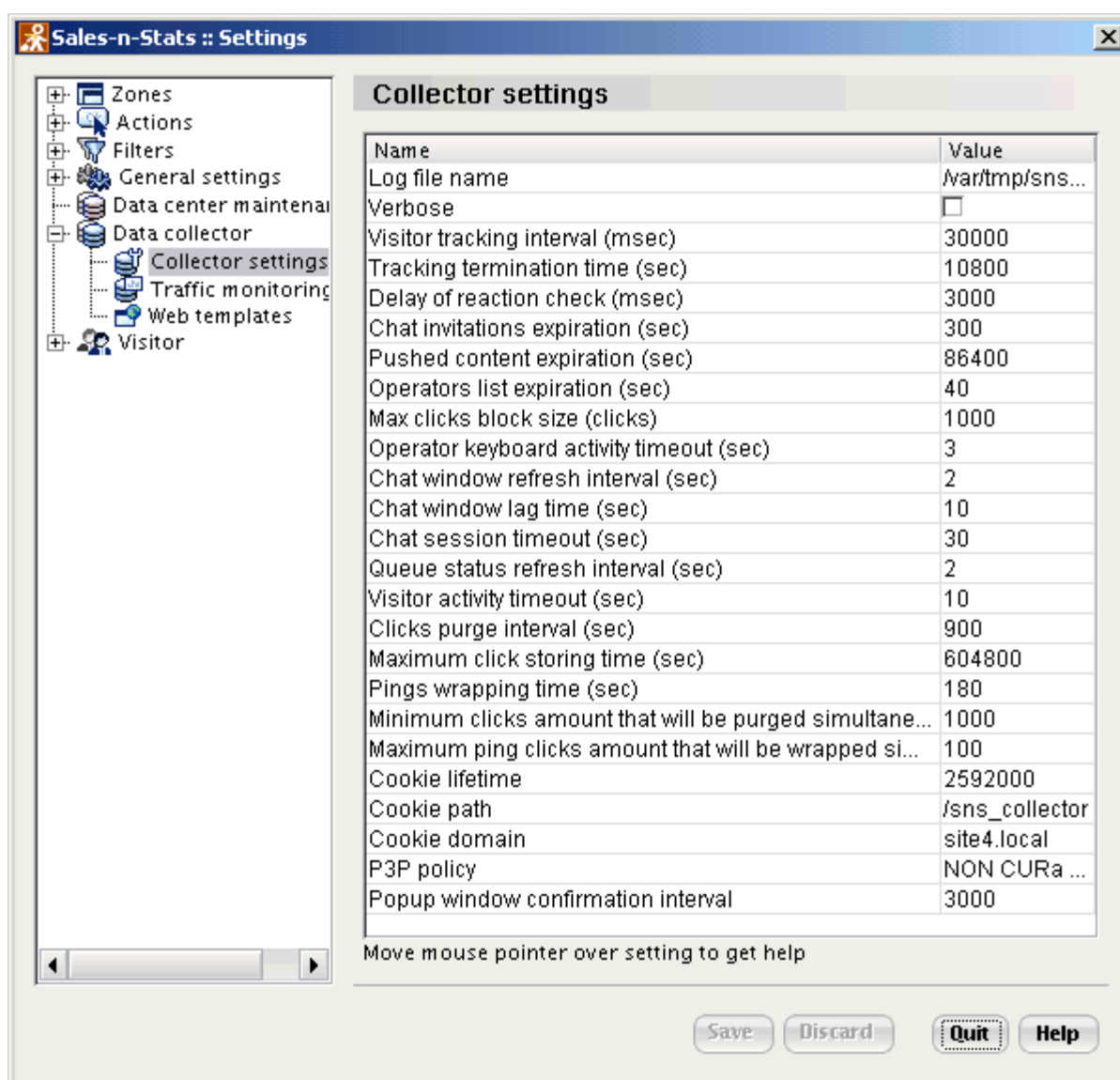
'Collector settings' dialog

Modify the necessary values in the following fields:

- **'Log file name'** is a file where the information from Data Collector is stored. Log file is saved to a temporary directory /var/tmp and is named according to the following pattern: sns-collector-Year-Month-Day-Hour-Min-Sec.log where the date corresponds to the Data Collector installation. (For example, if the Data Collector was installed on February 6, 2006 at 12.00.00 the file will have a name sns-collector-2006-02-06-12-00-00.log). If you have 'Verbose' check box selected, make sure you watch over the log file as it grows very fast and can take up all the space in your file system.

- Select the **'Verbose'** check box if you want the information to be stored in the log file that you enter into the previous field.

- Set the time interval in the **'Visitor tracking interval'** (msec) field and the system will track a visitor's current location in this time period. Default value is 30 sec. Set this time interval to 30 sec or so if your site is busy. This will help reduce traffic between Data Center and Data Collector. If your site is not very loaded you can set the 'Visitor tracking interval' to approximately 10 seconds. This interval also affects the speed with which the pushed messages are delivered. The longer the interval, the longer it takes the messages to be displayed at the visitor's end.

- **Tracking termination time (sec)** is maximum pinging time for a single pageview. Defaults to 10800 sec.

- **Delay of reaction check** is the delay after page load when Site Tracker inquires about any reactions that happened. By default the value is 3000 msec.

- Enter the time interval into the **'Chat invitations expiration'** (sec) field. If the chat invitation dialog is not delivered till this interval elapses, it will expire and will not be displayed. Default value is 300 sec.

- Enter the time interval into the **'Pushed content expiration'** (sec) field. If the pushed content is not delivered till this interval elapses, it will expire and will not be displayed. Defaults to 86400 sec.

- **Operators list expiration.** If operators list is not received for this period of time, data collector assumes no operators are active. Default value is 40 sec.

- The clicks are fetched by Data Collector in blocks. Set the corresponding number of clicks in the **'Click block size' (clicks)** field. Defaults to 1000 clicks.

- If an operator does not use a keyboard for the period of time that you define in the **'Operator keyboard activity timeout'** (sec) field, he will be marked as 'Idle'. By default the value is 3 sec.

- **Chat window refresh interval** determines how often the chat window is reloaded. Defaults to 2 sec.

- Set the time interval in **Chat session timeout** and the chat session will close with 'Chat ended by visitor' status after there was no response from the visitor for this period of time. Defaults to 30 sec.

- **Queue status refresh interval** determines if it is time to start a chat session with the next visitor in queue. Defaults to 2 sec.

- The system considers a visitor active after the last visitor's activity on the website during the time interval that you define in the **'Visitor activity timeout'** (sec) field. Defaults to 10 sec.

- **'Clicks purge interval'** (sec) is the time interval after which all received clicks will be purged. Defaults to 900 sec.

- All the clicks received during the time interval you define in the **'Maximum click storing time'** (sec) field will be stored in the database. Defaults to 604800 sec.

- All pings received during the time interval you define in the **'Pings wrapping time'** (sec) field will be wrapped in a single click. Defaults to 180 sec.

- In the **'Minimum clicks amount that will be purged simultaneously'** (records) field set the minimum number of clicks that will be purged to decrease script execution time. Defaults to 1000.

- In the **'Maximum ping clicks amount that will be wrapped simultaneously'** (records) field set the maximum number of ping clicks that will be wrapped in one click to decrease script execution time. Defaults to 100.

- **'Cookie lifetime'** is a Sales-n-Stats cookie lifetime period (sec). Defaults to 2592000 sec.

- **'Cookie path'** is the Data Collector path. The path is a portion of the URL that identifies the folders containing a file. For example, in the URL http://www.company.com/data_collector, the path is /data_collector. The path is entered automatically during installation.

- **'Cookie domain'** is the Data Collector domain name. For example, company.com. The domain name is entered automatically during installation.

- **P3P Policy** shows the privacy policy of your website. A sample P3P policy is entered automatically during installation.

- **Popup window confirmation interval** is the time between the opening of a popup window and the confirmation that it has been displayed. Defaults to 3000 msec.

Traffic monitoring

Select **Main Menu->Tools->System settings->Data Collector->Traffic monitoring** or **Main Menu->Connection->Traffic details** to go to the 'Traffic monitoring' dialog.

The first line in the section shows how many pageviews there are in Data Collector. By clicking on the **Purge** button you clear the Data Collector database any time you need which will ease Data Collector start up.

Use the 'Clicks purge interval' field in the 'Collector settings' section to define the time interval between automatic database clearing.

Indicate 'Traffic warning limit' and 'Traffic disabled limit'. If the traffic warning limit is reached, an operator gets an email notification, which also appears at the Data Center console. If the traffic disabled limit is reached, an operator gets the same notifications as in the case with the traffic warning limit but the connection with Data Collector will be immediately interrupted. Use these settings to fetch the data from Data Center, for example, to gather statistical information for the reports.

You can see the traffic for any date you define in the 'Show traffic for' select box in the table below. Click

Refresh to renew the data in the table.

The table allows you to see the traffic (in bytes) for each hour in the selected period of time. The information in the table is shown for the last 24 hours. There is the 'Total' traffic amount for the period of time till the present moment at the bottom of the table.
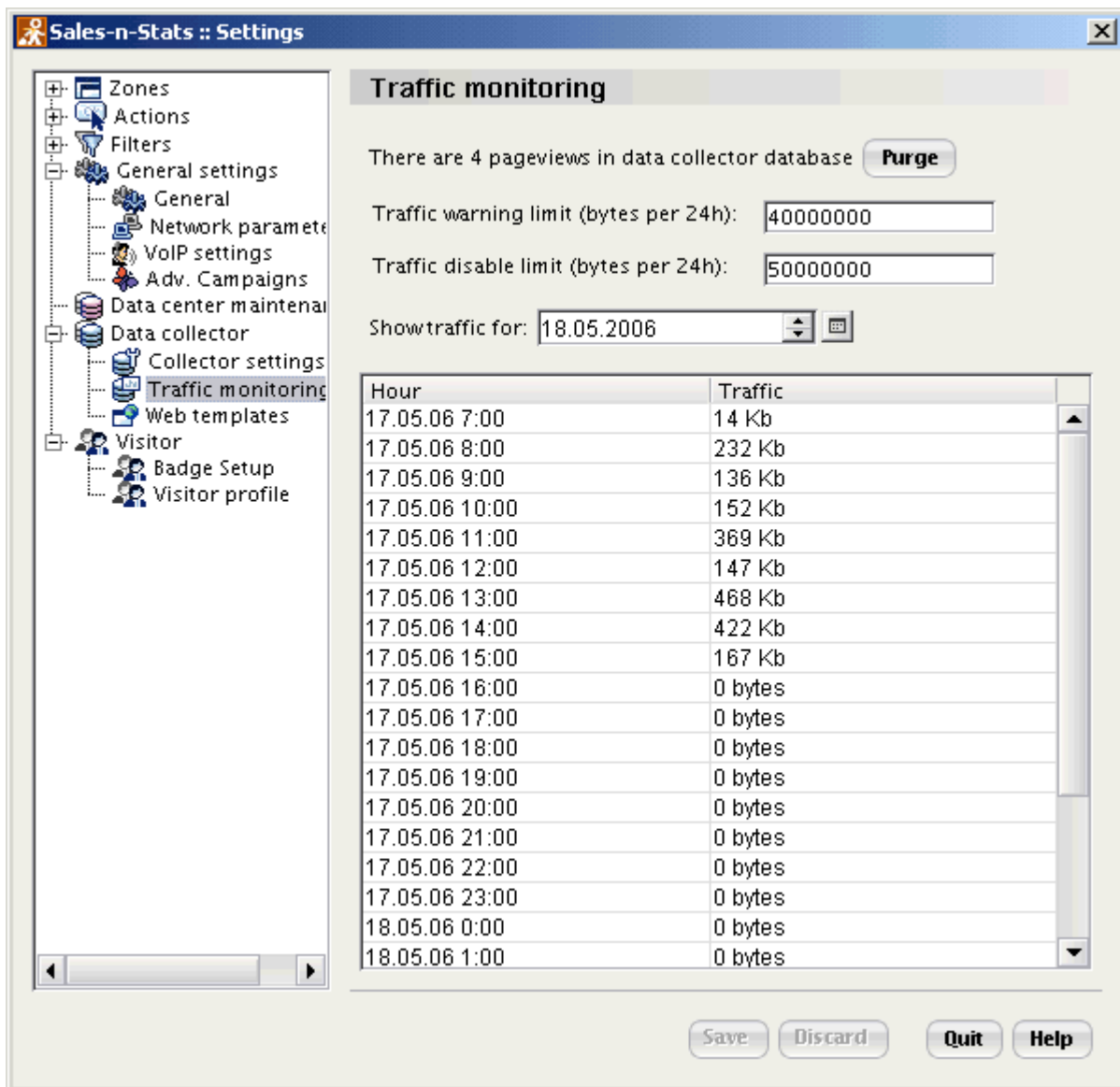
'Traffic monitoring' dialog.

Web templates

Sales-n-Stats allows you to edit the look and feel of Sales-n-Stats dialogs and popup windows visible on the site so they will match the overall style of the site. Moreover, if you use the same Sales-n-Stats system to monitor more than one site, you can have a different look for your Sales-n-Stats elements on each site. All you

need to do is create the necessary number of template sets and use the 'Web templates' section to assign a template set to each of your sites.

Initially, Sales-n-Stats uses the so-called default template set for all the elements on all the sites. To find out how to create a new template set, refer to the chapter 'Integrating Sales-n-Stats into your website' 33.

To assign a template set to a website:

1. Open the 'Web templates' section. Click **Add**. A new row will appear.

2. Double-click on the field in the 'URL' column. Enter the URL of a site to which you would like to assign a specific template set.

3. If you want the entered URL to use the default template set, just leave everything as it is. If you need to assign a different template set to it, click on the field opposite the URL in the 'Template set' column. You will be offered to select a template set from a drop-down list (all the template sets you create are added to this list automatically). Select the appropriate template set. The name of the set will appear in the 'Template set' column.

Note: Any modified fields will be marked with an asterisk.
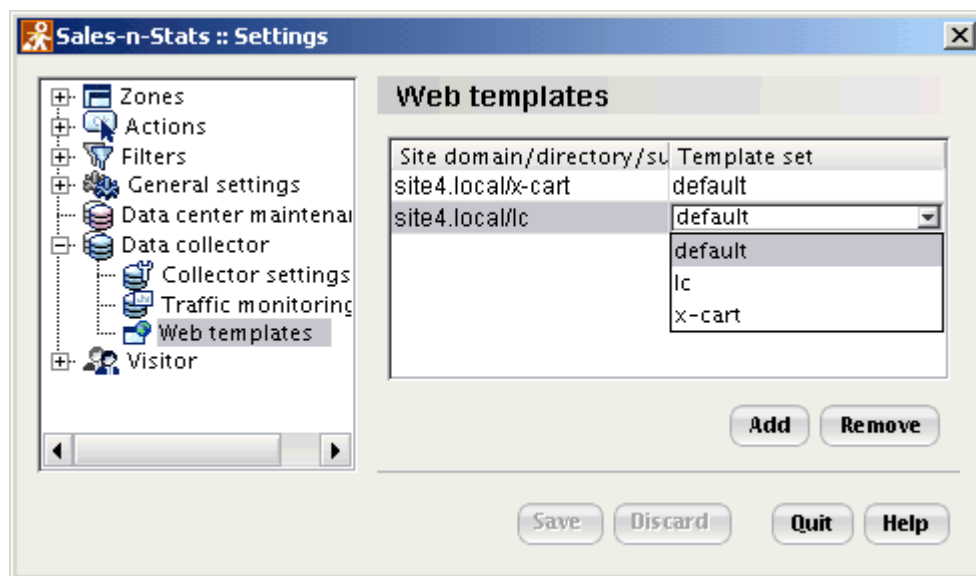
'Web templates' dialog: adding new set of templates

4. Click **Save** to apply the changes.

If you no longer want some template set to be assigned to an URL, remove its record from the 'Web templates' section:

1. Click on the record you want to remove. The record will be selected.

2. Click **Remove**. The URL and the template set will be marked by a minus sign.

3. Click **Save** to apply the changes.

8.10 Setting up the Visitor's Profile

The fields included into a Visitor's Profile can be set up via **Main Menu->Tools->System settings->Visitor->Visitor's Profile**.
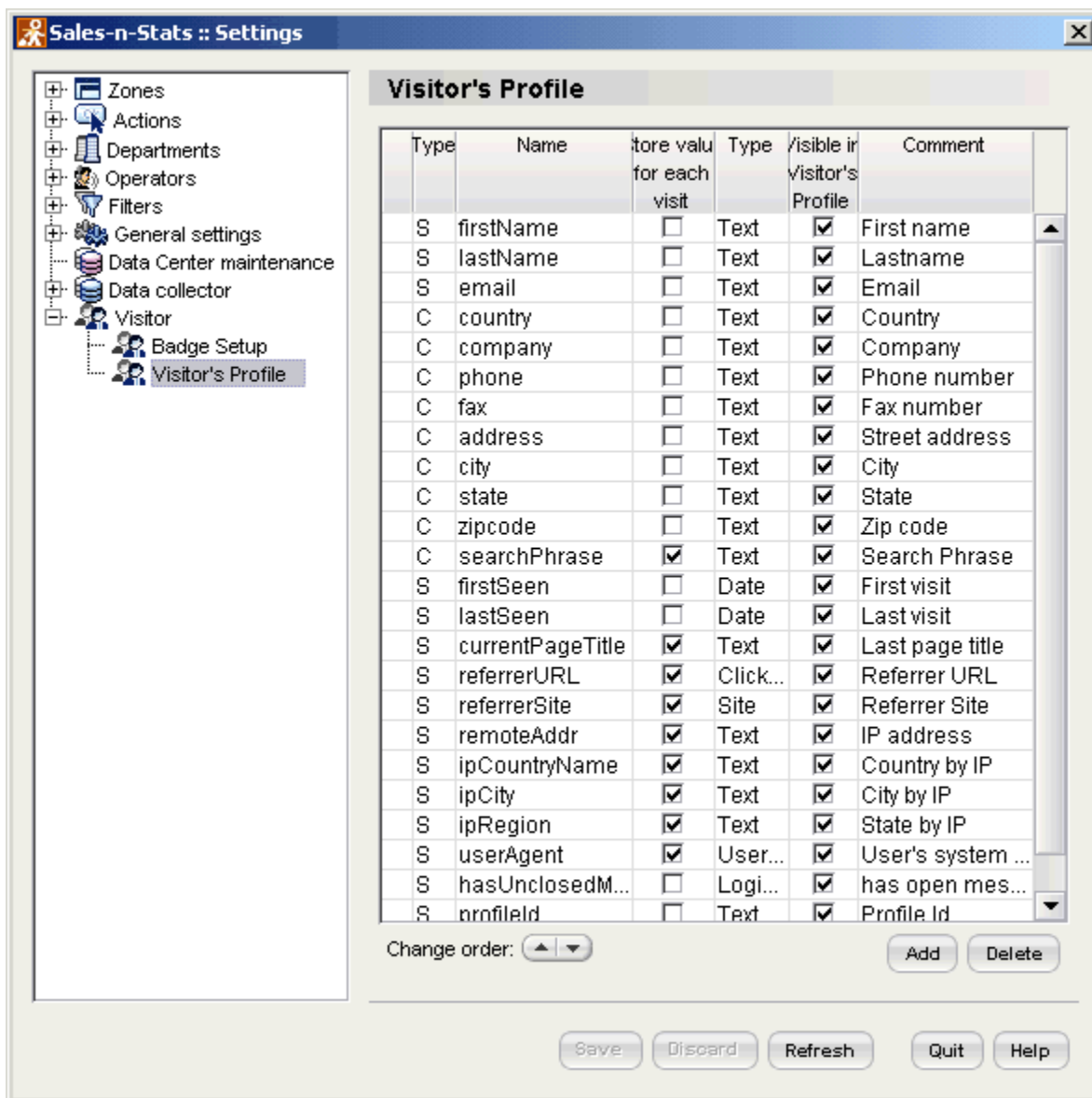
'Visitor's profile' section.

A Visitor's profile can contain system and custom fields. System fields are rigidly built into the system: their values are calculated according to the system rules and you cannot affect the way in which information is entered into them. Custom fields are any fields you add manually (you define what information is entered into custom fields and under what conditions). In the 'System settings' -> 'Visitor's Profile' section system fields are

marked by **'S'**, custom ones are marked by **'C'** ('Type' column).

Managing system fields

System fields are included into the profile by default and cannot be modified or deleted. The only way to get rid of a system field you do not want to see in a Visitor's profile is to make this field invisible. To hide a system field from the profile, clear the 'Visible in Visitor's Profile' check box opposite this field.

As to the system fields that you have chosen to keep visible, you should specify how you want information to be stored in each one of them.

There are two options:

- Select the 'Store value for each visit' check box opposite a field for Sales-n-Stats to 'remember' the value which the field had in each specific visit. Later on you will be able to review the details of any past visit and see what value was assigned to this field.

- Leave the 'Store value for each visit' check box clear for Sales-n-Stats not to store visit values for this field. The profile will only show the aggregate field value for the visitor (You will not be able to view the values associated with specific visits).

Defining custom fields

Custom fields can be added, edited or deleted.

To add a custom profile field:

1. Click **Add**. A new editable row is added to the list.

2. Think of a system name for this field and enter it into the empty input box in the 'Name' column. The name will be used to address the field within the system.

Note: A system field name can consist of letters a-z, A-Z, digits 0-9 and the underscore "_". The first character cannot be a digit. The name must be unique.

3. If you want the value of the Visitor's Profile field being created to be stored for each visit, select the check box in the 'Store value for each visit' column opposite the name of the field.

4. By default the field data type is 'Text' but you can click on the table cell and select a different type.

- **Text** should be selected if you want the field to be able to contain textual data.

- **Integer** should be selected if you want the contents of the field to be an integer value.

- **Real** should be selected if you want the contents of the field to be real.

- **Logical (yes/no)** should be selected if you want the contents of the field to be a flag value (the value of such a field may be either 'true' or 'false')

5. For example, the type of a field meant for a visitor's phone number should be 'Text', a field meant for the number of visits to the site – 'Integer', a field meant for the total of a user's orders – 'Real', a field meant for the flag 'Has products in the shopping cart (yes/no)' – 'Logical'.

6. Make sure the 'Visible in Visitor's Profile' check box is selected. This will show the new field in the Visitor's profile.

7. Set the name by which you will recognize the field in the Visitor's profile: click on the 'Comment' cell and enter the profile field name into the input box that appears.

'Visitor's profile' section: the fields of the editable row have been completed.

8. If necessary, adjust the order in which your profile fields will be displayed in the profile using the buttons below the list of fields. To move a field one position upwards, select it and click on the upward arrow button. To move a field in the downward direction, select it and click on the downward arrow button. After arranging the fields, click **Save**.

Note: Before you click **Save**, any changes may be cancelled by clicking **Discard**.

A popup dialog will appear prompting you to restart Sales-n-Stats for the changes to be applied properly. After restarting Sales-n-Stats the new Visitor's Profile field will be saved.

Editing a custom profile field:

1. Find the necessary field and click on the table cell containing the information you want to edit.

2. Now edit the information in the active box or click on another cell in the row to activate and edit it. Click **Save**.

Deleting a custom profile field:

1. Find the field you want to delete and click anywhere in the table row in which it is located.

2. Click **Delete**. The row will be marked by a minus sign to indicate that the field has been changed. Click **Save**.

The order of the profile fields defines the order of the fields in the visitors list search form. Arrange the profile fields with the help of the arrow buttons. Just select the fields and click on the buttons. Click **Save** to apply the changes.

See also:

8.11 Setting up the Visitor's Badge

To find general information about Visitor's Badge, its configuration and functioning refer to 'Visitor's Badge configuration' 82 section in the 'Getting started' 69 chapter.

To let the system know what elements you want to be displayed in a Visitor's Badge and under what conditions, you need to configure the Visitor's Badge in Sales-n-Stats System settings. It means you need to provide the system with a set of conditions and tell it what element should be placed into which slot if this or that condition is satisfied.

For example, you want to see on Site Monitor those visitors who have already ordered anything in your store. You should set the necessary conditions for one or more badge components. You might select an appropriate icon for Main Icon slot or a special icon for one of four Tokens. However, remember that the selected icon will appear on the Visitor's Badge only after the store administrator changed the order status from "Queued" to "Processed".

To start configuring the Visitor's Badge, go to the 'Badge Setup' section of the 'System settings' via **Main Menu ->Tools -> System settings -> Visitor->Badge Setup**. The 'Badge Setup' dialog allows you to adjust the settings of each of the editable badge components and view the settings regulating the work of non-editable elements.

Here are some general procedures for setting up the Visitor's Badge:

To open Badge Setup dialog:

Click a button with the name of the necessary item (for example, Main Icon) at the top of the window or click on the appropriate element in the 'Badge preview' section. The focus will then be redirected to the necessary item.

To select an icon:

Click **Browse**. 'Change Icon' window will appear.

Select the necessary icon with your mouse and click **Select** at the bottom of the 'Change Icon' window. If you want to use an icon of your own, click **New icon**, use the standard 'Open' dialog to locate the necessary image file on your local computer, select the file, enter a name by which you will recognize the icon into the 'Icon Name' field and click **OK**. The image will be added to the image set in the 'Change Icon' window. Select the image and click **Select**.

Note: Only GIF image files can be used as icons. The maximum size of a Token image is 16 x 16 px.
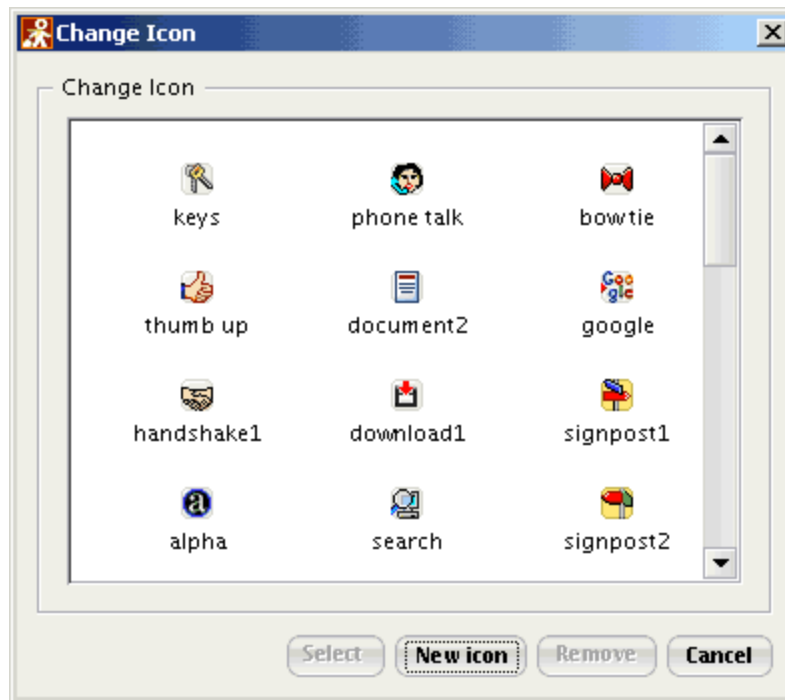
'Change Icon' window.

To set tooltip type:

Select either **Constant** or **Expression** from the drop-down box. **Constant** means the tooltip text will be permanent, and you need to enter the text manually. **Expression** means that it will be generated dynamically according to the property expression you define using the [Property Selector](#) 179.

To apply the changes:

After you made some changes click **Save** to apply them. Before you click **Save** any changes can be cancelled by clicking **Discard.**

See also:

[Visitor's Badge configuration](#) 82

8.11.1 Main Icon

To add a value for the Main Icon slot:

1. Click **Add**. 'Edit Token' dialog will be opened.

2. Click **Browse** to select an icon.
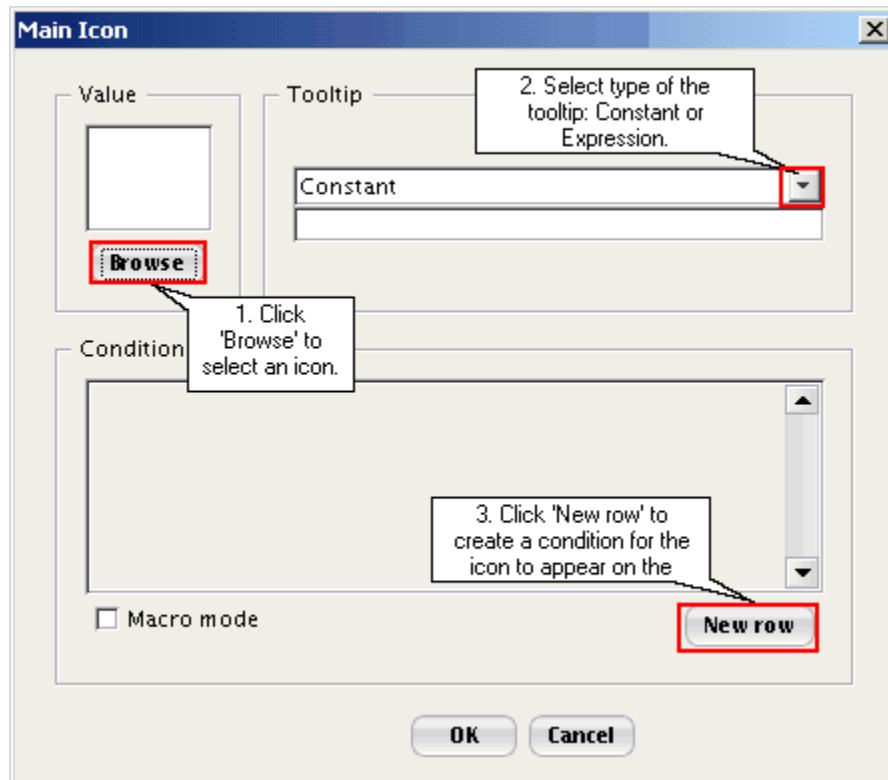
'Edit Token' dialog.

3. Set the tooltip type and enter either tooltip expression or text.

4. Set the condition for the icon to appear in the Main Icon slot of a Visitor's Badge.

In the example we chose a property from the Property Selector which means 'The visitor's company' (**Visitor Profile -> Company**), the sign of relation 'matches' and entered 'Creative Development*' into the third box. Now the condition reads 'The phrase that is the name of the visitor's company must include the words 'Creative Development'.

The asterisk (*) after Creative Development is used to create a pattern: it means that the phrase does not have to be limited to Creative Development, but can include other symbols/words (for example, if a Visitor's Profile

says he is from Creative Development LLC)

- (Optional) If you need to add more condition rows for the same icon, click **New row** button and repeat actions in step 3 as many times as needed. All the condition rows you add for one icon will be joined into one condition (the conditions set in the different rows will be joined by AND operator so a visitor property will have to satisfy the conditions in ALL the condition rows for the icon to be displayed in the Visitor's Badge).

5. Click **Save**.

6. If necessary, add more values for the Main Icon slot (repeat steps 1-5).
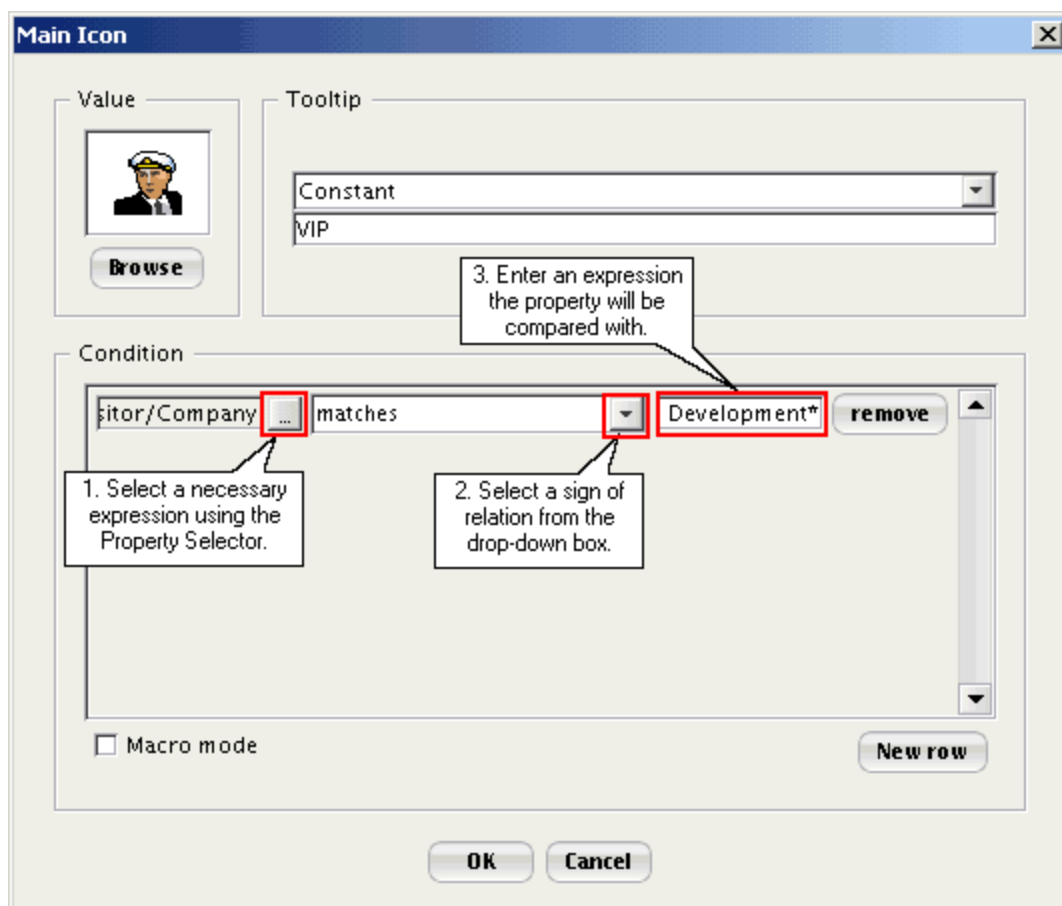
'Edit Token' dialog, setting up conditions.

7. Arrange the items in the Main Icon values list in order of priority with the help of upward and downward arrow buttons. Just select a list entry and click on the buttons. After arranging the Main Icon values click **Save**.

To edit an existing Main Icon value:

Click on the [...] button corresponding to the necessary value or double-click on the value. The 'Edit Token' dialog will be displayed. Inside this dialog edit the settings you want to change and click **Save** to apply the changes.

To delete a Main Icon value:

Select the necessary main icon value in the list and click **Delete**. The main icon value will be marked with a minus sign. Click **Save** to apply the changes.

8.11.2 Indicators

To add a value for an Indicator slot:

1. Click **Add**. 'Edit Token' dialog will be opened.

2. Set the Indicator type (**Constant/Expression**) and enter either a property expression or text.

3. Set the tooltip type and enter either tooltip expression or text.

4. Set the condition for the icon to appear in the Indicator slot of a Visitor's Badge.

5. Click **Save** to apply the changes.

6. Arrange the items in the Indicator values list in order of priority with the help of upward and downward arrow buttons. Just select a list entry and click on the buttons. After arranging the Indicator values click **Save**.

Adding a value for the indicator slot.

Example:

1. Select from the Property Selector: **All actions -> Add to cart actions -> Add to cart count**. This means 'The number of all Add to cart actions.

2. Select a sign of relation: **>** (more).

3. Enter the second part of the condition: **0**.

Now the condition reads: The visitor has added products to cart'. The Indicator in question will be displayed only on the badges of visitors satisfying this condition.

To edit an existing Indicator value:

Click on the button corresponding to the necessary value or double-click on the value. The 'Edit Token' dialog will be displayed. Inside this dialog edit the settings you want to change and click **Save** to apply the changes.

To delete an Indicator value:

Select the necessary Indicator value in the list and click **Delete**. The Indicator value will be marked with a minus sign. Click **Save** to apply the changes.

8.11.3 Tokens

Tokens reflect certain visitor properties (for example, 'visitor has a product in the shopping cart', 'visitor refused to talk', 'first visit', etc). When the system detects the properties in a visitor, it will insert the Token icons corresponding to these properties into the subslots of the 'Tokens' slot.

You can set up as many properties as you like, but no more than four of them will be simultaneously displayed in the 'Tokens' slot, and the positions of the property icons within the slot will be regulated by the principle of priority. A tooltip can be defined for each of the icons you use.

To add Tokens for the Tokens slot:

1. Click **Add**. 'Edit Token' dialog will be opened.

'Edit Token' dialog, setting up conditions: a value has been entered in the condition row (In plain words, the condition expression means The number of View legal info actions performed by the visitor must be more than zero)

2. Click **Browse** to select a new Token icon.

3. (Optional) Set the tooltip text for the icon.

4. Set the condition that will have to be fulfilled for the icon to appear in the Tokens slot of a Visitor's Badge.

- All the condition rows you add for one icon will be joined into one condition (the conditions set in the different rows will be joined by **AND** operator, so a visitor property will have to satisfy the conditions in **ALL** the condition rows for the icon to be displayed in the Visitor's Badge).

5. Click **Save** to apply the changes.

6. If necessary, add more values for the Tokens slot (repeat steps 1-6).

7. Arrange the items in the Token values list in order of priority with the help of upward and downward arrow buttons. Just select a list entry and click on the buttons. After arranging the Token values click **Save**.

Example:

1. Select from the Property Selector: **All actions -> View legal info actions -> View legal info count**. This means 'The number of times the visitor has viewed legal info.

2. Select a sign of relation - > (more).

3. Enter the second part of the condition - 0.

Now the condition reads: 'The visitor has viewed legal info'. The Token in question will be displayed only on the badges of visitors satisfying this condition.

To edit an existing Token:

Click on the ⬜ button corresponding to the necessary list entry or double-click on the list entry. The 'Edit Token' dialog will be displayed. Inside this dialog edit the settings you want to change. Click **Save** to apply the changes.

To delete a Token:

Select the necessary Token in the list and click **Delete**. The Token will be marked with a minus sign. Click **Save** to apply the changes.

8.11.4 Information

To add values for the Information slot:

1. Click **Add**. 'Edit Token' dialog will open.

2. Set up the Information slot value.

3. (Optional) Set the tooltip text for the Information slot value:

4. Set the condition that will have to be fulfilled for the value to appear in the Information slot:

- (Optional) If you need to add more condition rows for the same value, click **New row** and repeat actions in step 4 as many times as needed. All the condition rows you add for one value will be joined into one condition (the conditions set in the different rows will be joined by AND operator, so a visitor property will have to satisfy the conditions in ALL the condition rows for the value to be displayed in the Information slot).

5. Click **Save** to apply the changes.

6. If necessary, add more values for the Information slot (repeat steps 1-6).
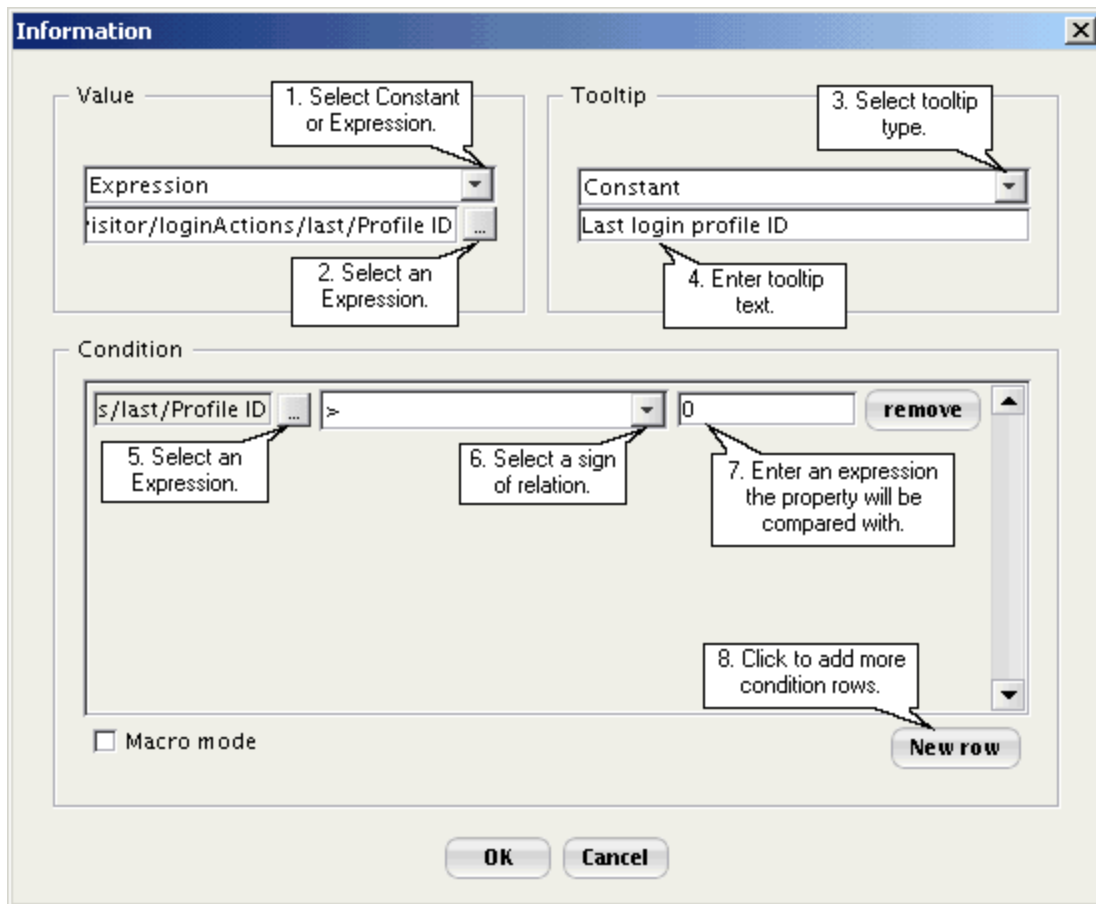
'Edit Token' dialog, setting up conditions: a value (0) has been entered in the condition row (the resulting condition
expression means The number of Login actions performed by the visitor must be more than zero)

7. Arrange the items in the Information values list in order of priority with the help of upward and downward arrow buttons. Just select a list entry and click on the buttons. After arranging the Information values click **Save** .

To edit an existing Information slot value:

Select the necessary Information slot value from the list and click on the ⬛ button corresponding to this value or double-click on the value. The 'Edit Token' dialog will be displayed. Inside this dialog edit the settings you want to change. Click **Save** to apply the changes.

To delete an Information slot value:

Select the necessary Information slot value from the list and click **Delete**. Click **Save** to apply the changes.

8.11.5 Messages

All the necessary settings for the Messages slot are defined in the system from the very start and cannot be edited via the 'Badge Setup' dialog. However, if you are interested to know how the 'Messages' element of the badge works, look into the 'Messages' section of the 'Badge Setup' dialog. Open it by clicking **Messages** button at the top of the dialog or by clicking on the Messages slot area in the 'Badge preview' section. The focus in the 'Badge preview' section will be redirected to the Messages slot.
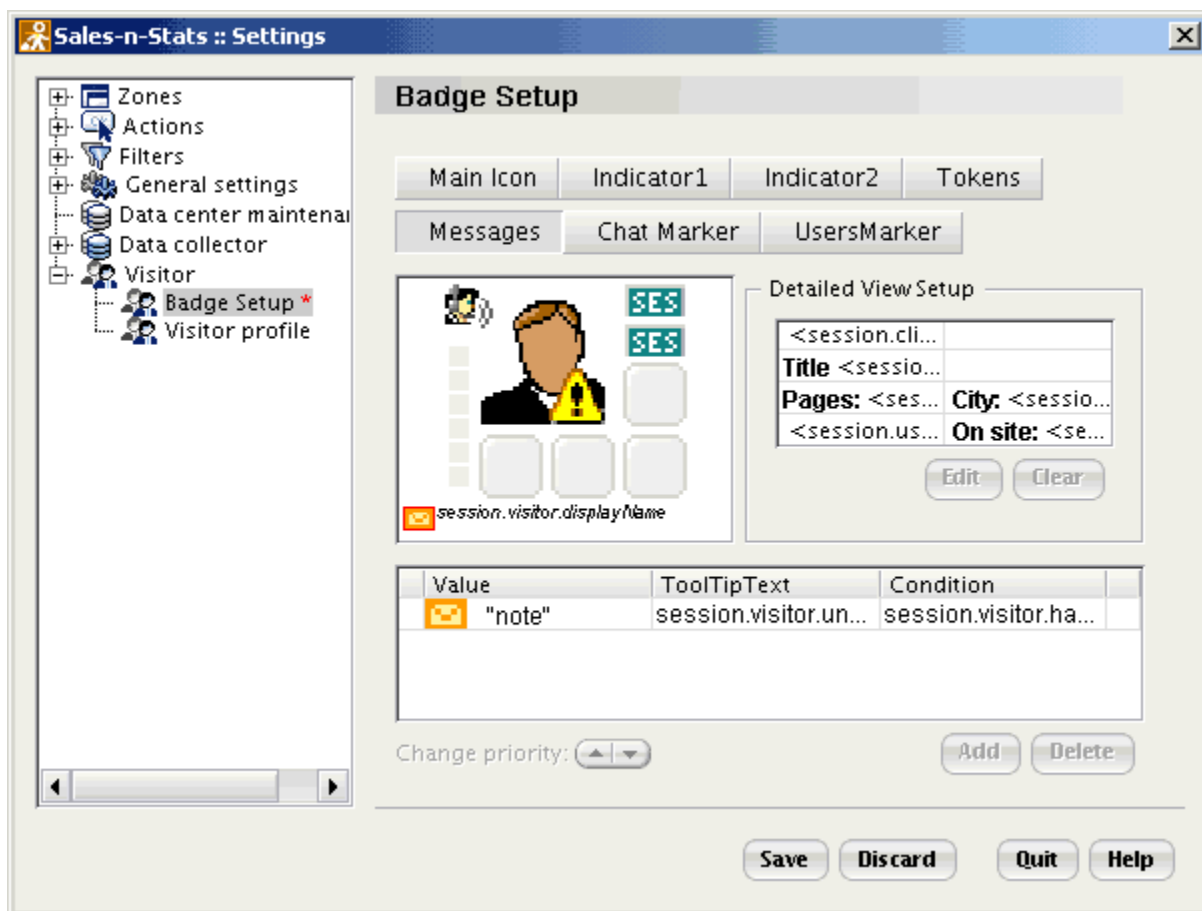
'Badge Setup' dialog: focus on the Messages slot.

In the area of the 'Badge Setup' dialog that normally lists the available values of the selected badge elements a single value will be displayed: an envelope icon. The expression used in the condition and the tooltip for this icon denotes that the envelope will be displayed on a Visitor's Badge only if this visitor has unclosed messages.

8.11.6 Markers

Chat Marker

All the necessary settings for the Chat Marker slot are defined in the system from the very start and cannot be edited via the 'Badge Setup' dialog. However, if you are interested to know how the Chat Marker element of the badge works, look into the 'Chat Marker' section of the 'Badge Setup' dialog.

In the area of the 'Badge Setup' dialog that normally lists the available values of the selected badge element two values will be displayed: one icon for a voice chat and one icon for a text chat. The expressions in the condition fields denote that these icons will be displayed on a Visitor's Badge only when this visitor is involved in a text or a voice chat.

User's Marker

To add values for the User's Marker slot:

1. Click **Add**. 'Edit Marker' dialog will be opened.

2. Click **Browse** to select a new marker icon.
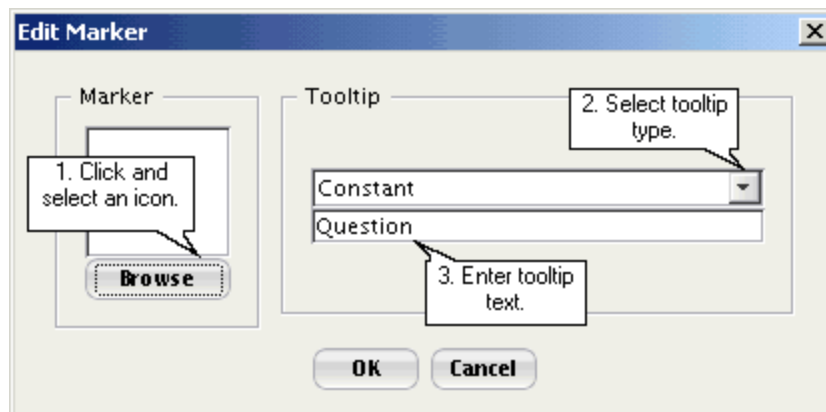
'Edit Marker' dialog, setting up the tooltip text: a constant value (Question) has been entered.

3. (Optional) Set the tooltip text for the marker. Click **OK**.

4. Click **Save** to apply the changes.

5. If necessary, add more values for the User's Marker slot (repeat steps 1-6).

To edit a tooltip for an existing User's Marker value:

Select the necessary marker in the list, click on the button corresponding to this list entry or double-click on the list entry. The 'Edit Marker' dialog will be displayed. Inside this dialog edit the tooltip and Click **OK**. Click **Save** to apply the changes.

To delete a User's Marker value:

Select the necessary marker value in the list and click **Delete**. The marker value will be marked with a minus sign.Click **Save** to apply the changes.

8.11.7 Zone Tracking Bar

All the necessary settings for the Zone Tracking Bar slot are defined in the system from the very start and cannot be edited via the Badge Setup dialog. However, if you are interested to know how the Zone Tracking Bar element of the badge works, look into the 'Zone Tracking Bar' section of the 'Badge Setup' dialog.
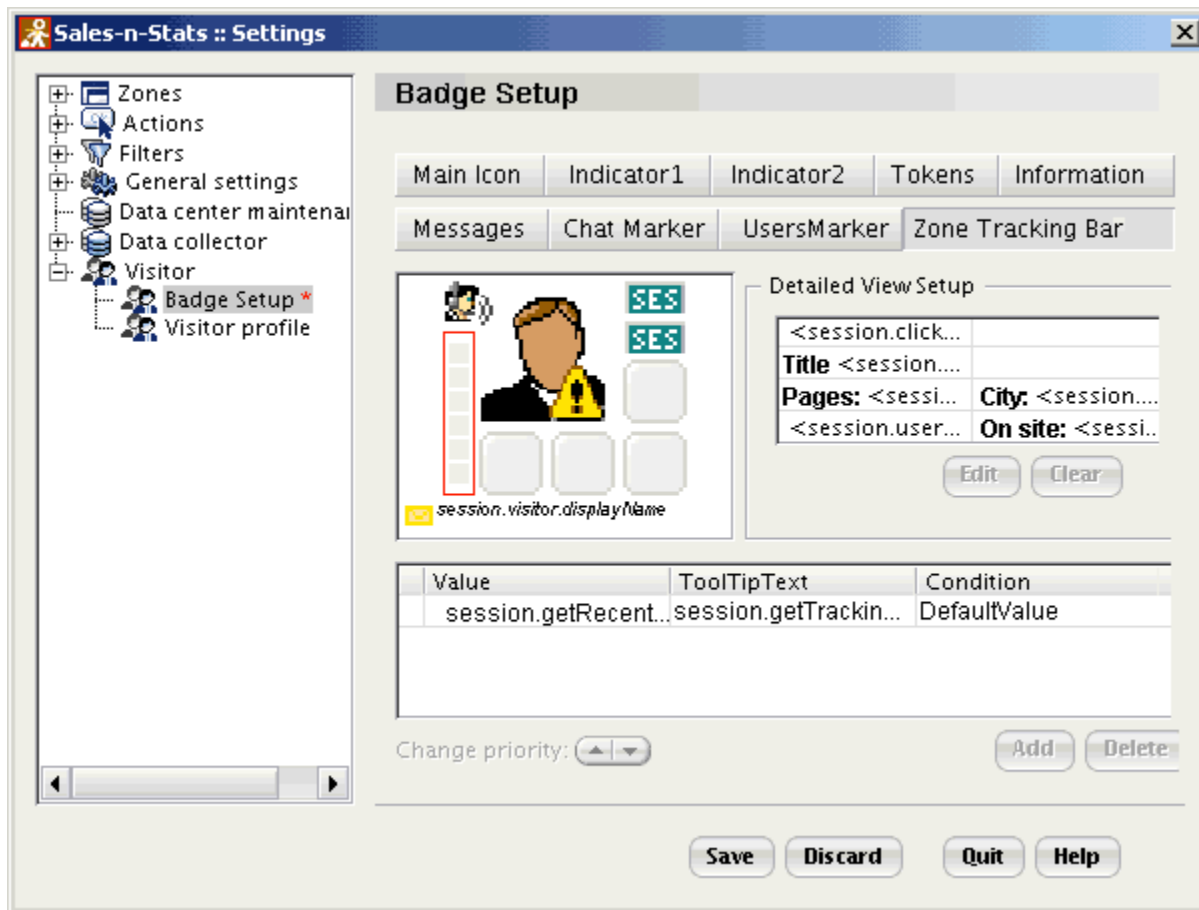
'Badge preview' section: focus on the Tracking Bar slot.

In the area of the 'Badge Setup' dialog that normally lists the available values of the selected badge element just one value will be displayed. The value itself and the expressions in the tooltip and the condition fields corresponding to this value denote that a tracking bar will be dynamically assembled on any Visitor's Badge as the owner of this badge moves from one zone to another.

8.11.8 Detailed View

The information which can be seen in a Detailed badge can be set up via the 'Detailed View Setup' section of the 'Badge Setup' dialog. The 'Detailed View information' section of a Visitor's Badge consists of eight slots all of which are set up in the same way.

To set up any of the slots in the 'Detailed View information' section of a badge, you need to open the 'Badge Setup' dialog and select the necessary slot in the 'Detailed View Setup' section. The slot will be highlighted.
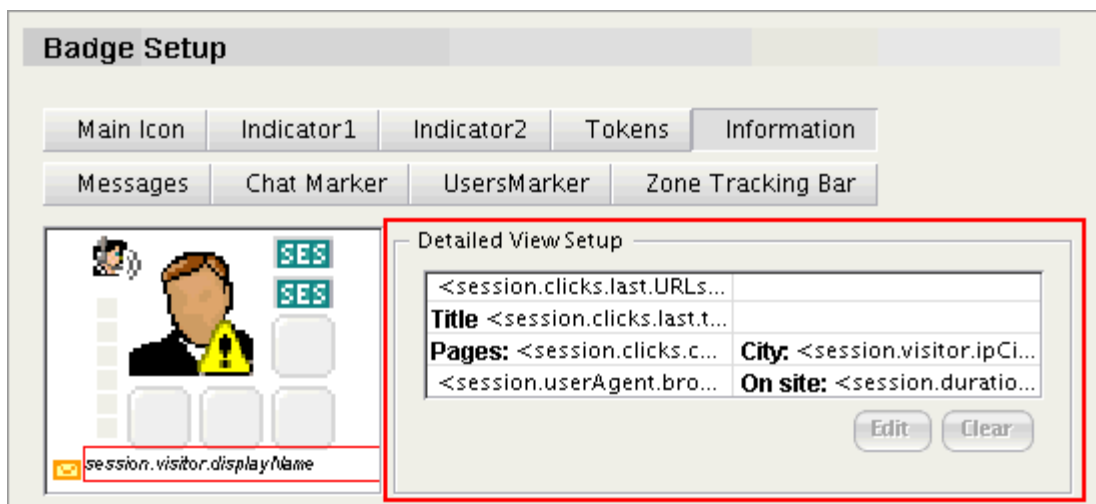
'Badge preview' section: focus on a Detailed View slot.

To add values for the Detailed View information slot:

1. Click **Edit**. 'Edit Property in Position' dialog will be opened.

Note: The steps that follow demonstrate how to set up a Detailed View slot value that will show the total of all the orders ever made by the visitor at your store.

2. (Optional) Use the 'Header' field to enter a word or phrase that will be seen as the slot title.

3. Set up the slot value: click on the ▢ button next to the 'Value' field and use the Property Selector to select the expression according to which the slot value will be formed.
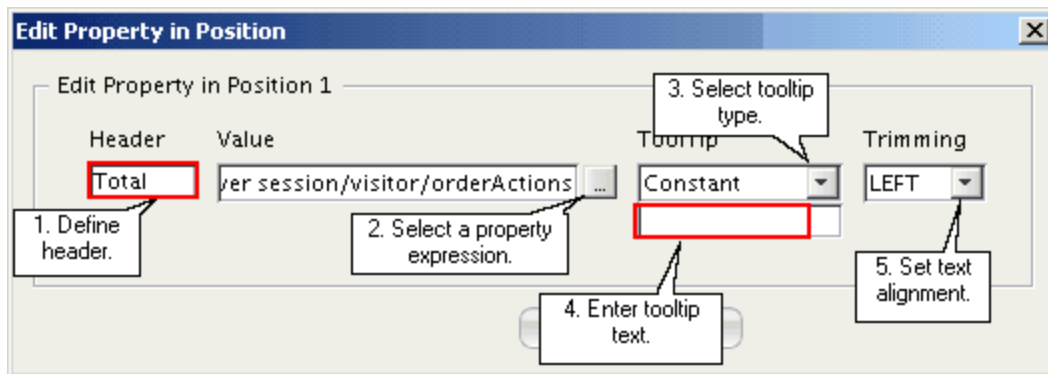
'Edit Property in Position' dialog, setting the slot value: an expression has been entered into the 'Value' field
(the selected expression means The total of all the orders made by the visitor)

4. (Optional) Set the tooltip text that will be shown when the mouse pointer passes over the slot:

5. Use the Trimming drop-down box to set alignment for the text within the slot (LEFT if you want the text to align left, RIGHT to align right and MIDDLE to be centered).

6. Click **OK**. The slot value will be added (it will be marked by a red asterisk).

7. Click **Save** to apply the changes.

To edit an existing Detailed View information slot value:

Go to the 'Detailed View Setup' section of the 'Badge Setup' dialog and select the slot which contents you want to edit. Open the 'Edit Property in Position' dialog Inside this dialog edit the settings you want to change. Click **Save** to apply the changes.

To delete a Detailed View information slot value:

Go to the 'Detailed View Setup' section of the 'Badge Setup' dialog and select the slot which contents you want to delete. Click **Clear**. The value will be removed from the slot. Click **Save** to apply the changes.

9. Appendices

In this chapter you can find reference information for setting up external actions and customizing Live Communication dialogs.

- Read the 'Preconfigured actions' [224] section to learn about the format of preconfigured actions for compatible e-commerce software.

- For information about the templates used to create Live Communication dialogs consult the 'Live Communication dialogs' [229] section.

9.1 Preconfigured actions

Format of preconfigured actions for e-commerce software

1. **'Add to cart' action**. Is generated when an item is added to the cart.

Action name: *AddToCart*.

Variable	Type	Description
productId	String	A shopping cart specific identifier of a product.
productName	String	Product name
categoryName	String	Product category name

2. **'Delete from cart' action**. Takes place whenever a product item gets removed from the shopping cart.

Action name: *DeleteFromCart*.

Variable	Type	Description
productId	String	ID of a product deleted from the shopping cart
productName	String	Product name
categoryName	String	Product category name

3. **'Cart changed' action**. Is generated when cart items are added, removed or updated, or when the cart is cleared (manually or as a result of checkout).

Action name: *CartChanged*.

Variable	Type	Description
itemsCount	Integer	Updated number of items in the cart
total	Double	Updated cart total value (a decimal number without currency signs and thousand separators)

4. **'Featured product selected' action**. Is performed when the product details page of a featured product is viewed by a customer.

Action name: *FeaturedProductSelected*.

Variable	Type	Description
productId	String	A shopping cart specific identifier of a product
productName	String	Name of a product

categoryName	String	Name of a product category

5. **'Bestseller selected' action**. Is performed when the product details page of a 'bestseller' product is viewed by a customer.

Action name: ***BestsellerSelected***.

Variable	Type	Description
productId	String	A shopping cart specific identifier of a product
productName	String	Name of a product
categoryName	String	Name of a product category

6. **'Order' action**. Is performed whenever an order is "Processed", i.e. purchased. If there are several items in the order, the order action is generated for each of them.

Action name: ***Order***.

Variable	Type	Description
billing_firstname	String	Visitor's billing first name
billing_lastname	String	Visitor's billing last name
profile_id	String	Visitor's Profile ID
billing_company	String	Visitor's billing company
billing_country	String	Visitor's billing country
billing_state	String	Visitor's billing state
billing_city	String	Visitor's billing city
billing_address	String	Visitor's billing address
billing_zipcode	String	Visitor's billing Zip code
billing_fax	String	Visitor's billing fax
billing_phone	String	Visitor's billing phone
email	String	Visitor's email address
orderId	String	A shopping cart specific identifier of the order
productId	String	A shopping cart specific identifier of a product
productName	String	Name of a product
categoryName	String	Name of a product category
total	Double	Order total value (a decimal number without currency signs and thousand separators)
quantity	Integer	Quantity of product items

7. **'Registration' action**. Is performed whenever a customer creates a profile and becomes a registered user.

Action name: *Register*.

Variable	Type	Description
billing_firstname	String	Visitor's billing first name
billing_lastname	String	Visitor's billing last name
profile_id	String	Visitor's Profile ID
billing_company	String	Visitor's billing company
billing_country	String	Visitor's billing country
billing_state	String	Visitor's billing state
billing_city	String	Visitor's billing city
billing_address	String	Visitor's billing address
billing_zipcode	String	Visitor's billing Zip code
billing_fax	String	Visitor's billing fax
billing_phone	String	Visitor's billing phone
email	String	Visitor's email address

8. **'Login' action**. Is generated whenever a user logs in (no matter if the login occurs as a result of submitting user authentication info via the login form or automatically as a result of submitting personal details at registration).

Action name: *Login*.

Variable	Type	Description
billing_firstname	String	Visitor's billing first name
billing_lastname	String	Visitor's billing last name
profile_id	String	Visitor's Profile ID
billing_company	String	Visitor's billing company
billing_country	String	Visitor's billing country
billing_state	String	Visitor's billing state
billing_city	String	Visitor's billing city
billing_address	String	Visitor's billing address
billing_zipcode	String	Visitor's billing Zip code
billing_fax	String	Visitor's billing fax
billing_phone	String	Visitor's billing phone
email	String	Visitor's email address

9. **'Filled contact form' action**. Is generated when a user submits the 'Contact us' form.

Action name: *FilledContactForm*.

Variable	Type	Description
billing_firstname	String	Visitor's billing first name
billing_lastname	String	Visitor's billing last name
billing_company	String	Visitor's billing company
billing_country	String	Visitor's billing country
billing_state	String	Visitor's billing state
billing_city	String	Visitor's billing city
billing_address	String	Visitor's billing address
billing_zipcode	String	Visitor's billing Zip code
billing_fax	String	Visitor's billing fax
billing_phone	String	Visitor's billing phone
email	String	Visitor's email address
enquiry	String	Visitor's enquiry according to the submitted contact form

10. **'Site search' action**. Takes place when a user performs a search on the site.

Action name: *SiteSearch*.

Variable	Type	Description
searchPhrase	String	Search phrase used by the visitor

11. **'Advanced search' action**. Is generated when a visitor uses 'Advanced search' to find a product on the site.

Action name: *AdvancedSearch*.

Variable	Type	Description
searchPhrase	String	Search phrase used by the visitor
categoryName	String	Name of the category where AdvancedSearch is done

12. **'View legal info' action**. Is performed when a user views a page with the store's legal info (e.g. Terms and Conditions, Privacy Statement).

Action name: *ViewLegalInfo*.

Variable	Type	Description
pageName	String	Name of the legal info page (shopping cart specific)

13. **'View help' action**. Is generated when a user views the 'Help' page.

Action name: *ViewHelp*.

Variable	Type	Description
pageURL	String	URL of the help page viewed first/last/by the visitor

14. **'Add to wish list' action**. Takes place when a user adds a product to a Wish list.

Action name: *AddToWishList*.

Variable	Type	Description
productId	String	A shopping cart specific identifier of a product
productName	String	Name of a product
categoryName	String	Name of the product category from which a product was added to the wish list

15. **'Write a review' action**. Is generated when a user posts a review.

Action name: *WriteReview*.

Variable	Type	Description
productId	String	A shopping cart specific identifier of a product.
productName	String	Name of a product
categoryName	String	Name of a product category
reviewText	String	Text of the review

9.2 Live Communication dialog templates

For your convenience we provide a list of 'Live Communication' dialogs and 'Push Content' popup windows with the templates used to display each dialog/window.
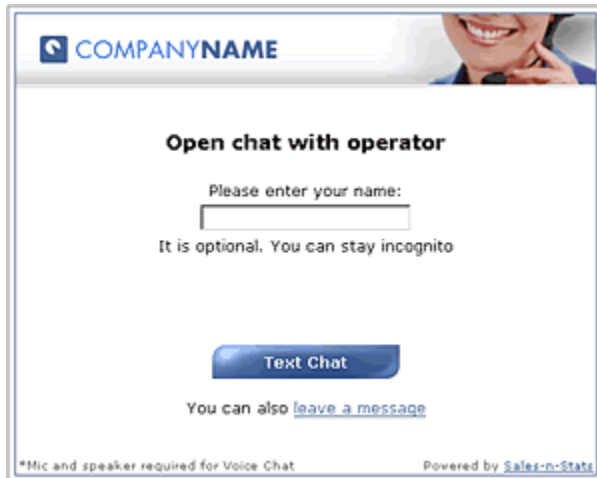
- startDialog.inc
- header.inc
- openChat.inc
- button.inc
- footer.inc
- endDialog.inc

- startDialog.inc
- header.inc
- routeCall.inc
- footer.inc
- endDialog.inc
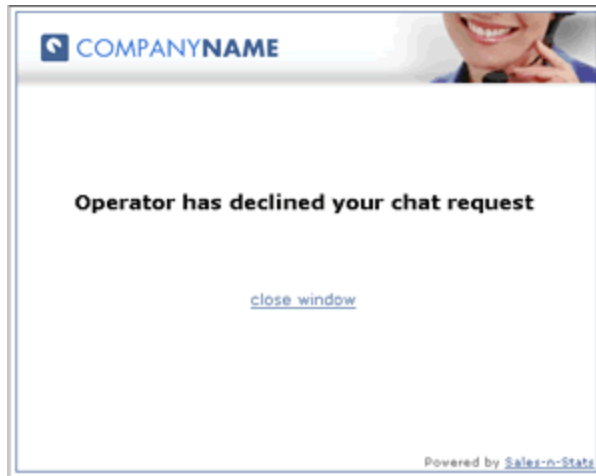
- startDialog.inc
- header.inc
- routeCall.inc
- footer.inc
- endDialog.inc

- startDialog.inc
- header.inc
- routeCall.inc
- footer.inc
- endDialog.inc
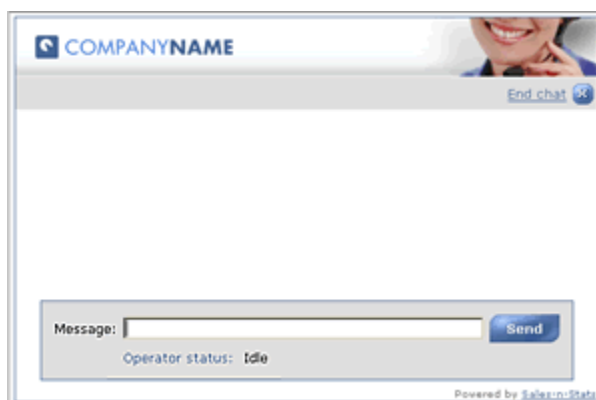
- startDialog.inc
- header.inc
- subheader.inc
- chatSubheader.inc
- chatWindow.inc
- smallButton.inc
- footer.inc
- endDialog.inc

- startDialog.inc
- header.inc
- subheader.inc
- chatSubheader.inc
- chatWindow.inc
- smallButton.inc
- footer.inc
- endDialog.inc

- htmlLayerPopup.inc
- header.inc
- subheader.inc
- pushContentSubheader.inc
- chatInvitation_Inlined.inc
- chatInvitation_InlinedJS_CloseWindow.inc
- chatInvitation_InlinedJS_StartChat.inc
- button.inc
- footer.inc
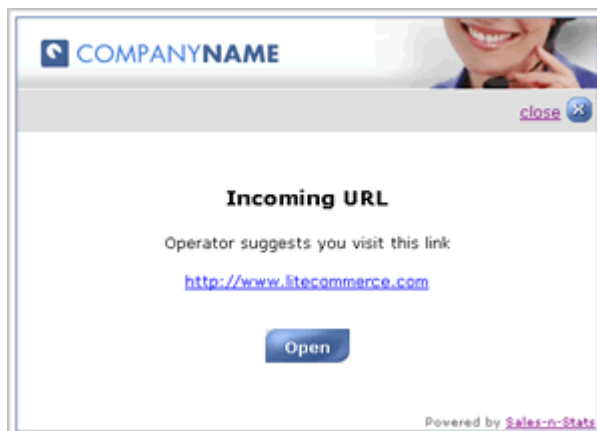
- htmlLayerPopup.inc
- header.inc
- subheader.inc
- pushContentSubheader.inc
- pushUrl.inc
- button.inc
- footer.inc
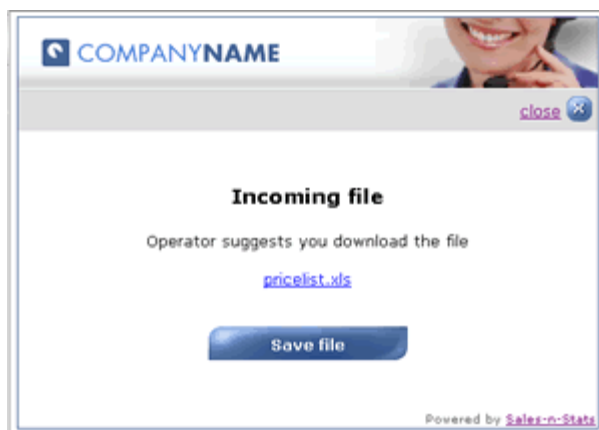
- htmlLayerPopup.inc
- header.inc
- subheader.inc
- pushContentSubheader.inc
- pushFile.inc
- button.inc
- footer.inc

- htmlLayerPopup.inc
- header.inc
- subheader.inc
- pushContentSubheader.inc
- pushHtml.inc
- button.inc
- footer.inc

- htmlLayerPopup.inc
- header.inc
- subheader.inc
- pushContentSubheader.inc
- pushImage.inc
- button.inc
- footer.inc

- startDialog.inc
- header.inc
- loadApplet.inc
- footer.inc
- endDialog.inc

- startDialog.inc
- header.inc
- leaveMessage.inc
- footer.inc
- endDialog.inc
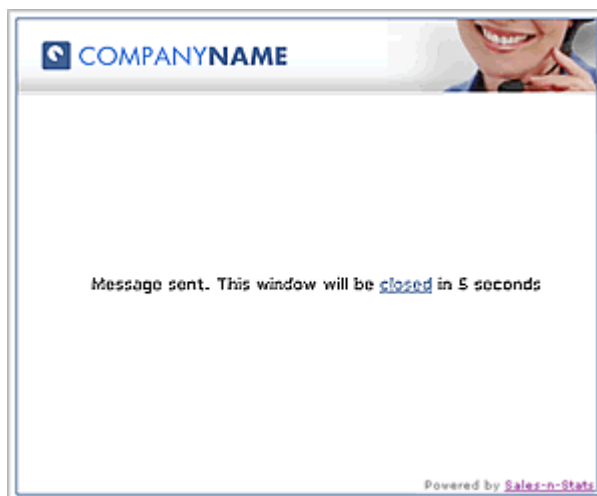
- startDialog.inc
- header.inc
- leaveMessage_Close.inc
- footer.inc
- endDialog.inc

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