



Cisco Unified Web and E-Mail Interaction Manager Administrator's Guide to Offers Console

For Unified Contact Center Enterprise

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Preface

- ▶ [About This Guide](#)
- ▶ [Document Conventions](#)
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- ▶ [Other Learning Resources](#)

Welcome to Cisco® Interaction Manager™, multichannel interaction software used by businesses all over the world to build and sustain customer relationships. A unified suite of the industry’s best applications for web and email interaction management, it is the backbone of many innovative contact center, customer service, and helpdesk organizations.

Cisco Interaction Manager includes a common platform and one or both of the following applications:

- ▶ Cisco Unified Web Interaction Manager (Unified WIM)
- ▶ Cisco Unified E-Mail Interaction Manager (Unified EIM)

About This Guide

Cisco Unified Web and E-Mail Interaction Manager Administrator’s Guide to Offers Console introduces you to the Offers Console and helps you understand how to set up web pages and configure offers for those web pages.

Document Conventions

This guide uses the following typographical conventions.

Convention	Indicates
<i>Italic</i>	Emphasis. Or the title of a published document.
Bold	Labels of items on the user interface, such as buttons, boxes, and lists. Or text that must be typed by the user.
Monospace	The name of a file or folder, a database table column or value, or a command.
<i>Variable</i>	User-specific text; varies from one user or installation to another.

Document conventions

Acronyms and Initialisms

Acronyms and initialisms used in this document are listed here:

- ▶ ARM: Agent Reporting and Management
- ▶ CSA: Cisco Security Agent
- ▶ CTI: Computer Telephony Integration
- ▶ EAAS: External Agent Assignment Service
- ▶ ICM: Intelligent Contact Management
- ▶ IPCC: Internet Protocol Contact Center


- ▶ IPTA: ICM-picks-the-agent
- ▶ JDBC: Java Database Connectivity
- ▶ MR: Media Routing
- ▶ MRD: Media Routing Domain
- ▶ ODBC: Open Database Connectivity
- ▶ PG: Peripheral Gateway
- ▶ PIM: Peripheral Interface Manager
- ▶ SNMP: Simple Network Management Protocol
- ▶ UI: User Interface

Other Learning Resources

Various learning tools are available within the product, as well as on the product CD and our web site. You can also request formal end-user or technical training.

Online Help

The product includes topic-based as well as context-sensitive help.

Use	To view
 Help button	Topics in <i>Cisco Unified Web and E-Mail Interaction Manager Help</i> ; the Help button appears in the console toolbar on every screen.
F1 keypad button	Context-sensitive information about the item selected on the screen.

Online help options

Document Set

The Cisco Unified Web and E-Mail Interaction Manager documentation is available in the `Documents` folder on the product CD. The latest versions of all Cisco documentation can be found online at <http://www.cisco.com>

- ▶ All Unified EIM documentation can be found online at http://www.cisco.com/en/US/products/ps7236/tsd_products_support_series_home.html
- ▶ All Unified WIM documentation can be found online at http://www.cisco.com/en/US/products/ps7233/tsd_products_support_series_home.html
- ▶ In particular, Release Notes for these products can be found at http://www.cisco.com/en/US/products/ps7236/prod_release_notes_list.html
- ▶ For general access to Cisco Voice and Unified Communications documentation, go to http://www.cisco.com/en/US/products/sw/voicesw/tsd_products_support_category_home.html

The document set contains the following guides:

- ▶ *Hardware and System Software Specification for Cisco Unified Web and E-Mail Interaction Manager*
- ▶ *Cisco Unified Web and E-Mail Interaction Manager Installation Guide*
- ▶ *Cisco Unified Web and E-Mail Interaction Manager Browser Settings Guide*

User guides for agents and supervisors

- ▶ *Cisco Unified Web and E-Mail Interaction Manager Agent's Guide*
- ▶ *Cisco Unified Web and E-Mail Interaction Manager Supervisor's Guide*

User guides for Knowledge Base managers and authors

- ▶ *Cisco Unified Web and E-Mail Interaction Manager Knowledge Base Author's Guide*

User guides for administrators

- ▶ *Cisco Unified Web and E-Mail Interaction Manager Administrator's Guide to Administration Console*
- ▶ *Cisco Unified Web and E-Mail Interaction Manager Administrator's Guide to Routing and Workflows*
- ▶ *Cisco Unified Web and E-Mail Interaction Manager Administrator's Guide to Chat and Collaboration Resources*
- ▶ *Cisco Unified Web and E-Mail Interaction Manager Administrator's Guide to Email Resources*
- ▶ *Cisco Unified Web and E-Mail Interaction Manager Administrator's Guide to Data Adapter*
- ▶ *Cisco Unified Web and E-Mail Interaction Manager Administrator's Guide to Offers Console*
- ▶ *Cisco Unified Web and E-Mail Interaction Manager Administrator's Guide to Reports Console*
- ▶ *Cisco Unified Web and E-Mail Interaction Manager Administrator's Guide to System Console*
- ▶ *Cisco Unified Web and E-Mail Interaction Manager Administrator's Guide to Tools Console*

1

Offers Basics

- ▶ [Key Terms and Concepts](#)
- ▶ [Settings for Offers](#)
- ▶ [Elements of the User Interface](#)

This chapter introduces the basics of using the Offers Console to set up offers on web pages.

Key Terms and Concepts

Offer

- ▶ An offer is a personalized invitation to a website visitor to chat with an agent. Tailored by the visitor's browsing behavior, an offer aims to proactively fulfill the visitor's need. It usually appears in a small pop-up window to invite the visitor to chat with an agent.

Web Page

- ▶ A web page is a single web page on a website, for example, <http://www.company.com/products/account.htm>. Offers are assigned to web pages.

Web Page Pattern

- ▶ A web page pattern is a URL pattern that maps to more than one web page, defined using a regular expression, for example, http://www.company.com/products/*.htm. Offers can be assigned to web page patterns if the same offer is to be presented on several pages of the website.

Related User Roles

Users who need to create and manage offers must be assigned the Offers Manager role. Users with this role get access to the Offers Console. For details about creating users and assigning roles, see the *Cisco Unified Web and E-Mail Interaction Manager Administrator's Guide to Administration Console*.

Settings for Offers

Make sure that the following partition level and department level settings are configured. For details about these settings, see the *Cisco Unified Web and E-Mail Interaction Manager Administrator's Guide to Administration Console*.

Partition Level Settings

- ▶ Offers - Expired Period
- ▶ Offers - Interval for Re-offering Ignored Offers

- ▶ Offers - Interval for Re-offering Accepted Offers
- ▶ Maximum Time on Page in Minutes
- ▶ Offers - Interval for checking eligibility of an offer that is not presented

Department Level Settings

The following settings are applicable only for offers that are configured with entry point links for integrated chats.

- ▶ Chat - Agent availability buffer value
- ▶ Chat - Agent availability check mechanism

Elements of the User Interface

The Offers Console screen has three elements:




1. [Console Toolbar](#)
2. [List View](#) of Offers and Web Pages
3. [Status Bar](#)






The other important functional area is the [Dashboard](#) section. Screens that are used to create and edit offers and web pages open in new windows.

Console Toolbar

The Console toolbar provides access to the main elements of the Offers Console, as well as to the Messages, and Settings windows. It also helps you perform common tasks such as navigating to other consoles or logging out of the system. The Offers and Web Pages lists have their own toolbars. See [“List View Toolbar” on page 14](#).

The different sections of the application that are accessed from the Console toolbar are explained here.

Use	To
 Consoles button	Navigate to other consoles. This button is not displayed if you have access only to the Offers Console. Users with the Offers Manager role get access to the Offers Console.
 Dashboard button	View the Dashboard . Here you can view usage statistics and lists of recently added web pages and offers.
 Web Pages button	View a list of Web Pages . From here you can view, create, edit, and delete web pages.

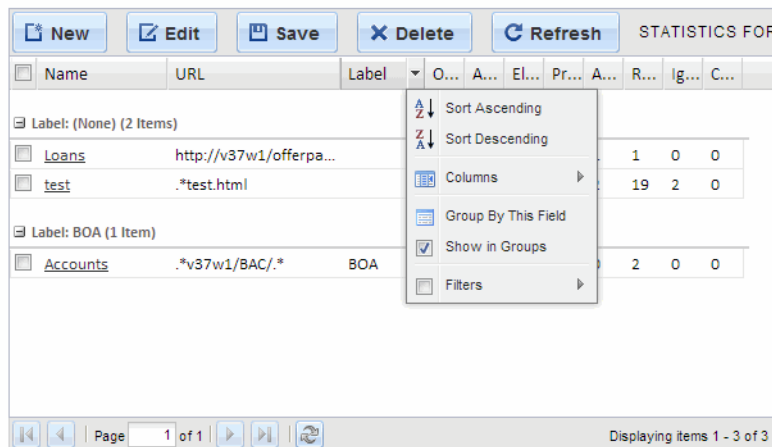
Use	To
 Offers button	Open the Offers screen. On this screen you can view, create, edit, and delete offers.
 Options button	Open the Options window. In this window, you can access the code required to enable offers on web pages. You can also change your password from here.
 Messages button	Open the Messages window. In this window, you can read messages sent to you by other users of the application. You can also send messages to other users or external email addresses. A flashing button indicates that you have received a new message.
 Log Out button	Log out of the application.
 Help button	View the online help for the Offers Console. The arrow next to the button indicates that additional options are available. Point to the button to view and select additional learning resources on the company website.

List View

The Offers and Web Pages screens present list views. The list view can be customized by adding or removing columns or by changing the sorting order. If there are more than 10 offers or web pages in the system, information is displayed on multiple pages.






You can move between the pages using the first page, previous page, next page, and last page buttons. You can also type in a specific page number.

Web Pages



List view of web pages

List View Toolbar

Use	To
 New button	Create new offer or web page.
 Edit button	Edit offer or web page.
 Save button	Save changes made to the label.
 Delete button	Delete offer or web page.
 Refresh button	Refresh the list.

Changing List View

You can change the list view by accessing the dropdown menu from the column heading.

Some of the available actions are:

- ▶ [Changing Sort Order](#)
- ▶ [Adding or Removing Columns](#)
- ▶ [Grouping by Fields](#)
- ▶ [Filtering Data](#)



Important: Changes made to the list view are not saved. When you move away from the list view and come back to it, the default view is used.

Changing Sort Order

To change the sort order:

1. Move the cursor to the right corner of the column heading by which you wish to sort the list.
2. When the dropdown menu arrow appears, click to see the menu choices.
3. From the menu, click the **Sort Ascending** or **Sort Descending** options to change the sort order.
4. If grouping is not enabled, you can just click the column name to change the sorting order.

Adding or Removing Columns

To add or remove columns from the list view:

1. Move the cursor to the right corner of a column heading.
2. When the dropdown menu arrow appears, click to see the menu choices.
3. From the menu, go to **Columns** and add or remove the columns from the list view. The list refreshes, displaying the new column selections.

Grouping by Fields

To enable grouping by a field:

1. If the list is not grouped, move the cursor to the right corner of the heading of the column by which you want to group items.
2. When the dropdown menu arrow appears, click to see the menu choices and select the **Show in Groups**. To group by a specific field, select the dropdown menu from that column and choose the **Group By This Field** option.
3. To view a flat list of all items, make sure the **Show in Groups** option is not selected.

Filtering Data

To filter data:

1. Move the cursor to the right corner of a column heading.
2. When the dropdown menu arrow appears, click to see the menu choices.
3. From the menu, go to **Filters** and in the text box type the text by which you want to filter the information in the list.
4. The list view displays the filtered data.
5. To remove the filter, clear the text from the text box.

Status Bar

The status bar at the bottom of the screen displays the following information:

- ▶ The user name of the current user.
- ▶ The language currently in use.
- ▶ The status of the system. (“Loading,” “Ready,” etcetera)

2 Planning

- ▶ [About Offers](#)
- ▶ [Understanding How Offers Works](#)
- ▶ [Planning an Offers Deployment](#)

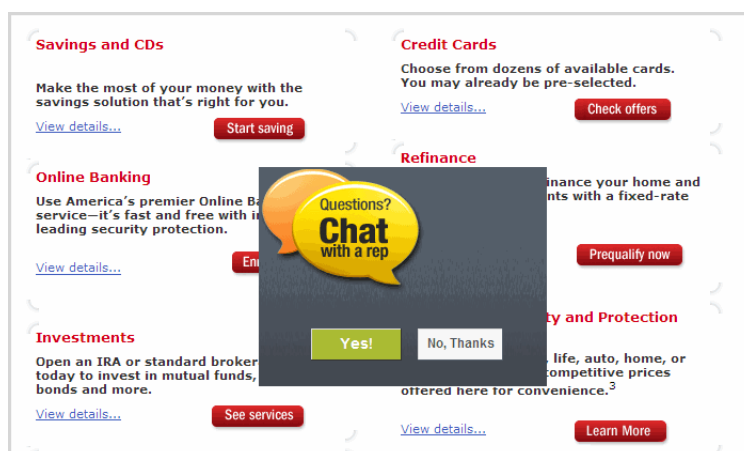
About Offers

Offers enable the system to intelligently detect visitor navigation patterns on a website and present a personalized invitation to a website visitor to chat with an agent.

Understanding How Offers Works

When a user visits a web page which is enabled for Offers, a request is made to the server to fetch the offers applicable to that page. Once the response comes, all the offers and their conditions are then available in the browser. Conditions are evaluated in the browser. Once the visitor becomes eligible, a server request is sent to check if there are agents available to serve the chat request for the entry point in the Offer's chat URL. If any user is available only then the offer is presented.

1. A visitor visits web pages that are enabled with Offers, and based on their browsing pattern or other cookie attributes, eligibility conditions are triggered. The assigned queue for the chat entry point is checked for agent availability. If an agent is available in the queue, then an offer is presented to the visitor.
2. The visitor has a choice to accept, ignore, or reject the presented offer.
 - If the visitor accepts an offer, the offer is logged as accepted and the visitor is given the option to engage with an agent in a chat interaction.
 - In the case of a chat offer, if the agent determines that the visitor has been successfully converted to a buyer, the agent can mark the chat offer as converted.
 - If the visitor accepts or rejects an offer they can be presented with the same offer again during their current web session. This is done only if they become eligible for that offer again after a defined period of time. You can choose not to present the offer again.
 - If the visitor chooses to ignore the presented offer, they will be presented the same offer again during their current web session. This is done only if they become eligible for that offer again after a defined period of time.



Sample offer on a web page

Planning an Offers Deployment

These questions are designed to help you plan your Offers deployment. Some important items to consider are:

1. How do I identify the web pages on which I want to present offers?
 - a. Identify the most important customer segments of your business.
 - b. Identify the areas of the web site where you can present help to customers to facilitate their decision making and convert "browsers" into "customers". Also consider pages where the customer experience can be made richer by presenting additional assistance.
 - c. Work with your web master to identify the URLs of these pages.
2. What are the eligibility conditions that when met, should result in an offer to a visitor? For details about conditions see [“Creating Offers” on page 36](#).
3. Do I want to configure offers for A/B testing?
 - This allows you to configure two different offers on the same page and alternatively present the offers at random to web page visitors. The offer that returns a higher conversion rate can then be deployed on the page. For details see [“Creating Offers for A/B Testing” on page 40](#).

3 Getting Started

- ▶ [Preparing the Website for Offers](#)
- ▶ [Customizing Banners](#)
- ▶ [Preparing Entry Points for Offers](#)
- ▶ [Configuring Offers](#)


Preparing the Website for Offers

To enable offers on a particular web page, you need to embed a code snippet in the html source code of that page. If you are enabling an entire website, you can embed this code in a file that is included in all other pages, like a footer or header.

Sample code snippet:

```
<script>
    function eG0FR0nLoad()
    {
        window.setTimeout("eG0FRLoadJS()",10);
    }
    function eG0FRLoadJS()
    {
        var e0FRElement = document.createElement("script");
        e0FRElement.id = "eGainOffers";
        e0FRElement.type = "text/javascript"
        e0FRElement.src =
        "http://v2d3/system/Offers.egain?command=GetRulesJS&egofferpageurl=" +
        encodeURIComponent(document.URL) + "&egofferpagetitle="+
        encodeURIComponent(document.title);
        document.getElementsByTagName("head")[0].appendChild(e0FRElement);
    }
    (navigator.appName == "Microsoft Internet Explorer") ?
    window.attachEvent("onload", eG0FR0nLoad):window.addEventListener("load",
    eG0FR0nLoad, false);
</script>
```

To prepare web pages for offers:

1. In the Offers Console toolbar, click the **Options**  button.
2. In the settings window, from the Offer Enablement tab you can view the code for enabling offers. Click the **Copy to Clipboard** button to copy the code and provide it to your web master along with the following instructions:

To enable offers on a particular web page, copy the code snippet and paste it in the html source of that page. If you are enabling an entire website, you could embed this code in a file that is included in all other pages. For example, the code could be included in a footer or header. The code snippet contains the name of the server on which Offers is installed. If a load balancer is being used, or the fully qualified domain name was not used by the user while logging in to Offers, you may need to update the hostname in the code snippet.

After the code snippet is embedded in the html source, you can create offers for those pages.



Important: This code is common for all offers and needs to be added only once to web pages. Specific offers can be added or removed from the web page without making any changes to the code.

Customizing Banners

Offers are presented in the form of web banners. The system comes with 13 templates that can be used for creating banners. The out of the box templates can be customized by changing the CSS files and images. You can edit the `egpsoffer.css` file and the images in the Images folder. Make sure do not make changes to any other files. Contact Cisco if you want to add new banner templates for presenting offers.

The templates are available in the `eService.ear` file. Contact your system administrator and request for the following:

- ▶ `offerstemplates.war` file to get files for all offers templates.
- ▶ Files for a specific template. Provide the name of the template to get the files for a specific template.

After you are done making changes to your templates, send the files back to the system administrator and request them to add it to the `eService.ear` file.

Preparing Entry Points for Offers

The services that are presented to customers as offers should be planned and prepared before you begin configuring offers. For chat offers, configure the queues and entry points from the Administration Console and get the links for the entry point. Plan which offers should map to which departments and create queues and entry points accordingly. It is best to create dedicated queues and entry points for chats that are routed from Offers.



Important: While creating entry points for use in chat offers, you must set the agent availability as Required.

Configuring Offers

To configure offers:

- ▶ Enable web pages for offers. See [“Preparing the Website for Offers” on page 20](#). Visitors to the website are not required to download anything.
- ▶ Configure and manage web pages through the Offers Console. These refer to the actual web pages on your website. See [“Creating Web Pages” on page 29](#).
- ▶ Configure and manage offers through the Offers Console. This includes:

- Identifying eligibility conditions
- Customizing banners for offers
- Preparing chat entry points for different types of offers
- Creating offers
- Adding and activating offers on web pages

See [“Offers” on page 34](#) for details.

- ▶ Ensure that agents who service chat offers have been assigned the Unified WIM license.
- ▶ Plan which offers should map to which departments and create queues and entry points accordingly. It is best to create dedicated queues, entry points, and agents for chats that are routed from Offers.

4 Dashboard

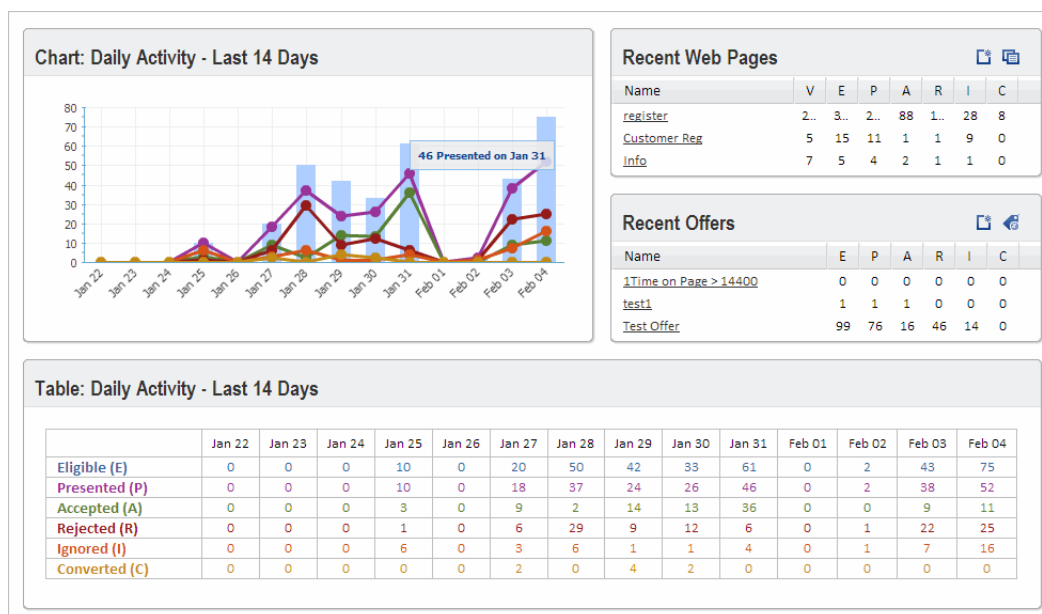
- ▶ [About the Dashboard](#)
- ▶ [Viewing Usage Statistics](#)
- ▶ [Viewing Recently Added or Changed Offers](#)
- ▶ [Viewing Recently Added or Changed Web Pages](#)

The landing page for the Offers Console is the Dashboard.

About the Dashboard

The dashboard provides an overview of how offers have been performing over the last 14 days. A chart containing a count of eligible, presented, accepted, rejected, ignored, and converted offers is displayed. The same information is also presented in a table.

A list of recently added and changed web pages and offers is also provided. For each offer and web page, a count of the number of times visitors became eligible, offers were presented, accepted, and converted is also presented.



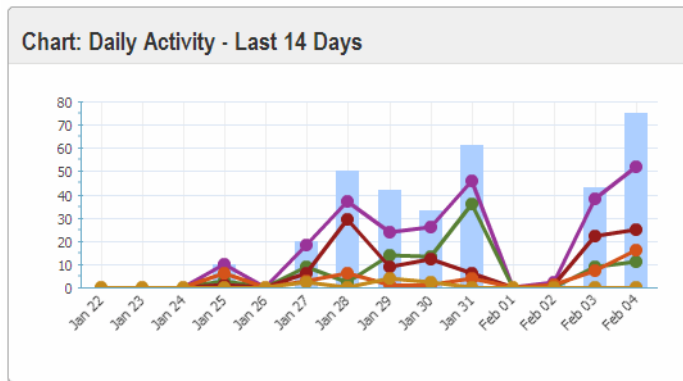
Dashboard

Viewing Usage Statistics

To view usage statistics:

1. In the Offers Console toolbar, click the **Dashboard** button and go to the Dashboards screen.
2. You see a daily activity chart for the last 14 days. A count of eligible, presented, accepted, rejected, ignored, and converted offers are included in the chart.

Place your cursor over the different elements on the chart to view additional details.



View daily activity chart

A table containing the same information is also presented.



Table: Daily Activity - Last 14 Days



	Jan 22	Jan 23	Jan 24	Jan 25	Jan 26	Jan 27	Jan 28	Jan 29	Jan 30	Jan 31	Feb 01	Feb 02	Feb 03	Feb 04
Eligible (E)	0	0	0	10	0	20	50	42	33	61	0	2	43	75
Presented (P)	0	0	0	10	0	18	37	24	26	46	0	2	38	52
Accepted (A)	0	0	0	3	0	9	2	14	13	36	0	0	9	11
Rejected (R)	0	0	0	1	0	6	29	9	12	6	0	1	22	25
Ignored (I)	0	0	0	6	0	3	6	1	1	4	0	1	7	16
Converted (C)	0	0	0	0	0	2	0	4	2	0	0	0	0	0

View daily activity table

Viewing Recently Added or Changed Offers

To view recently added or changed offers:



1. In the Offers Console toolbar, click the **Dashboard** button and go to the Dashboards screen.
2. In the Recent Offers section you can see a list of recently created and modified offers.
3. Click the **New Offer**  button to create a new offer, or click the **All Offers**  button to see the complete list of offers available in the system.

Recent Offers  							
Name	E	P	A	R	I	C	
1Time on Page > 14400	0	0	0	0	0	0	
test1	1	1	1	0	0	0	
Test Offer	99	76	16	46	14	0	

View recent offers

Viewing Recently Added or Changed Web Pages

To view recently added or changed web pages:

1. In the Offers Console toolbar, click the **Dashboard** button and go to the Dashboards screen.
2. In the Recent Web Pages section you can see the recently created or modified web pages.
3. Click the **New Web Page**  button to create a new web pages, or click the **All Web Pages**  button to see the complete list of web pages created in the system.

Recent Web Pages  							
Name	V	E	P	A	R	I	C
register	2..	3..	2..	88	1..	28	8
Customer Reg	5	15	11	1	1	9	0
Info	7	5	4	2	1	1	0

View recent web pages



Web Pages

- ▶ [About Web Pages and Web Page Patterns](#)
- ▶ [Viewing List of Web Pages](#)
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- ▶ [Editing Web Pages](#)
- ▶ [Assigning Offers to Web Pages](#)
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- ▶ [Specifying Order of Offers](#)
- ▶ [Removing Offers From Web Pages](#)
- ▶ [Deleting Web Pages](#)

This chapter will assist you in understanding how to configure web pages where offers are to be presented.

About Web Pages and Web Page Patterns

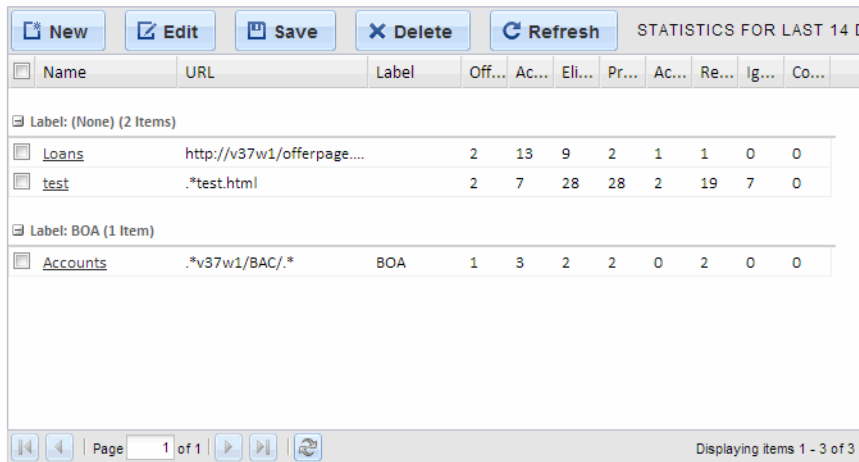
A web page is a single web page on a website, for example, `http://www.company.com/products/one.html`. A web page pattern is a URL pattern that maps to more than one web page, defined using a regular expression, for example, For example, `http://www.company.com/page.html`, `http://www.company.com/support/*`, `http://www.company.com/*.*`, or `http://www.company.com/*/contactus.jsp`.

Web pages can be grouped by labels. A web page can have multiple offers assigned to it.

Viewing List of Web Pages

Clicking the Web Pages button in the Offers Console toolbar brings up a list of all the web pages and web page patterns that have been created in the system.

Web Pages



The screenshot shows a web application interface for managing web pages. At the top, there are buttons for 'New', 'Edit', 'Save', 'Delete', and 'Refresh', along with a 'STATISTICS FOR LAST 14 D' label. Below the buttons is a table with columns: Name, URL, Label, Off..., Ac..., Eli..., Pr..., Ac..., Re..., Ig..., Co... The table is grouped by labels: 'Label: (None) (2 Items)' and 'Label: BOA (1 Item)'. The 'None' group contains 'Loans' and 'test'. The 'BOA' group contains 'Accounts'. At the bottom, there is a pagination bar showing 'Page 1 of 1' and 'Displaying items 1 - 3 of 3'.

Name	URL	Label	Off...	Ac...	Eli...	Pr...	Ac...	Re...	Ig...	Co...
Label: (None) (2 Items)										
<input type="checkbox"/>	Loans	http://v37w1/offerpage...	2	13	9	2	1	1	0	0
<input type="checkbox"/>	test	.*test.html	2	7	28	28	2	19	7	0
Label: BOA (1 Item)										
<input type="checkbox"/>	Accounts	.*v37w1/BAC/.*	BOA	1	3	2	2	0	2	0

List of web pages

The fields displayed are:

- ▶ **Name:** Name of the web page.
- ▶ **URL:** URL of the web page.
- ▶ **Label:** Label created for the web page. This is the only field that can be edited from the list view.
- ▶ **Offers:** Number of offers configured for the web page.
- ▶ **Accessed:** Number of times the web page was accessed.
- ▶ **Eligible:** Number of offers that became eligible on the web page.

- ▶ **Presented:** Number of offers presented on the web page.
- ▶ **Accepted:** Number of offers accepted on the web page.
- ▶ **Rejected:** Number of offers rejected on the web page.
- ▶ **Ignored:** Number of offers ignored on the web page.
- ▶ **Converted:** Number of chat offers converted on the web page. An offer is considered converted, when the agent clicks the **Converted** button in the Agent Console. This button is available for chats initiated from offers.

If there are more than 10 items in the list, information is displayed on multiple pages. You can move between the pages using the **Previous Page**, **First Page**, **Next Page**, and **Last Page** buttons.




Note: Statistics for the last 14 days are presented here.

The list view can be customized. See [“Changing List View”](#) on page 14

Creating Web Pages

To create a web page:

1. Go to the Web Pages screen.
2. Click the **New**  button.
3. In the New Web Page window, provide the following details:
 - **Name:** Provide a name for the web page.
 - **Description:** Provide a brief description.
 - **Label:** Provide a label for the web page. Labels are used to group web pages.

- **URL:** Provide the URL or URL pattern for the web page for which you want to configure offers. For example, `www.company.com/page.html` or `www.company.com/support/*.*`. Note that two web pages cannot be created with the same URL.

New Web Page



1. Provide General Details

Name *
Application Form

Description

URL *
`http://www.company.com/bac/application.htm`

Label
Auto Loan


Save and Close Save

Provide general information

4. Click the **Save** button. The page is refreshed and you see the option to add or activate offers. For details, see [“Assigning Offers to Web Pages”](#) on page 30 and [“Activating Offers”](#) on page 31.

Editing Web Pages

To edit a web page:



1. Go to the Web Pages screen.
2. Select a web page and click the **Edit**  button or just click the name of the web page. From other screens, such as Dashboard or Offers, click the name of the web page.
3. In the Web Page: *Page_Name* window that opens, view the page details and edit them, as required. For details about the options available, see [“Creating Web Pages”](#) on page 29.

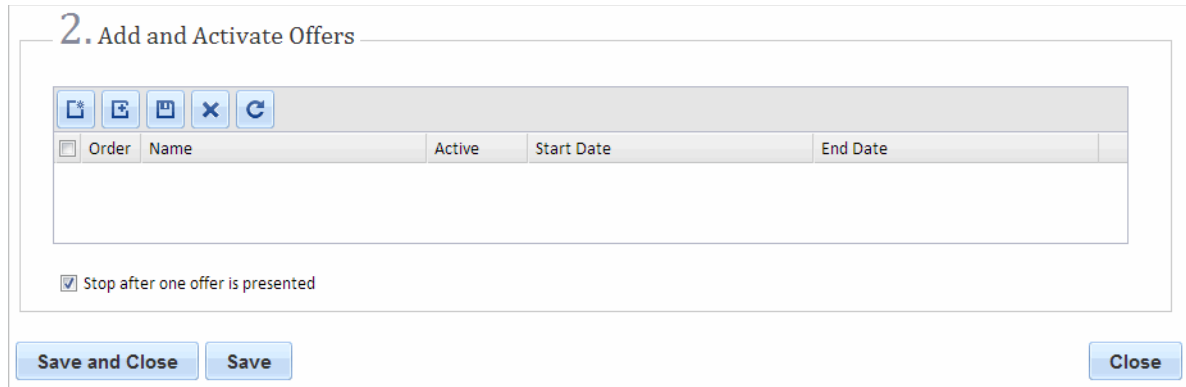
Assigning Offers to Web Pages

After creating a web page, assign the offers you want to present on the page. You can configure more than one offer for a web page and set the order in which offers should be presented.

When multiple offers are associated with a web page, they are presented in the order specified here. You can choose to present all offers configured for a page as they become eligible, or present only the first offer that becomes eligible on a page.

To assign an offer to a web page from the Web Pages screen:

1. Go to the Web Pages screen.
2. Click the name of the web page or select a web page and click the **Edit**  button.
3. In the Web Page: *Page_Name* window, in the Add and Activate Offers section, do the following:
 - a. Click the **Add**  button.




Order	Name	Active	Start Date	End Date
-------	------	--------	------------	----------

Stop after one offer is presented

Save and Close **Save** **Close**

Add and activate offers


- b. From the Offers window select the offers to be presented on the page. You can select multiple offers.
 - c. Click the **Add Selected and Close** button.
 - d. To present all the offers configured for a web page as they become eligible, uncheck the **Stop after one offer is presented** option. By default this option is selected, which means that only the *first* offer that becomes eligible on a page is presented and rest of the offers are not considered.
- If an offer is not already created, click the **New**  button to first create an offer ([page 36](#)).
4. Close the Web Page: *Page_Name* window.

After assigning offers to web pages, you need to activate the offer and specify the order of offers. See [“Activating Offers” on page 31](#) and [“Specifying Order of Offers” on page 32](#).

Activating Offers

After offers are assigned to web pages, you need to activate them. You can also set a publish date and expiry date for an offer. Offers can be activated and deactivated in real-time.

To activate an offer:

1. Go to the Web Pages screen.
2. Click the name of the web page or select a web page and click the **Edit**  button.
3. In the Web Page: *Page_Name* window, in the Add and Activate Offers section, do the following.
 - Click in the **Active** field and from the dropdown list, select **Yes** to activate the offer.
 - Select **Scheduled** to set a publish date and expiry date for the offer.

- Select **No** to deactivate an offer.

2. Add and Activate Offers

Order	Name	Active	Start Date	End Date
1	Chat Offer	Yes		
2	Proactive Chat Offer	Scheduled		

Stop after one offer is presented

Buttons: Save and Close, Save, Close

Activate offers

4. Click the **Save** button. You can also click the **Save and Close** button to save the changes and close the window.

Specifying Order of Offers

After offers are assigned to web pages, you need to specify the order in which the offers should be presented to customers. When an offer is activated or scheduled, a number is automatically assigned to the offer.

When multiple offers are associated with a web page, they are presented in the order specified here. You can choose to present all offers configured for a page as they become eligible, or present only the first offer that becomes eligible on a page.

To specify the order of an offer:

1. Go to the Web Pages screen.
2. Click the name of the web page or select a web page and click the **Edit** button.

The Web Page: *Page_Name* window opens.

3. In the Add and Activate Offers section, in the **Order** field specify the order at which the offer should be presented.


4. To present all the offers configured for a web page as they become eligible, uncheck the **Stop after one offer is presented** option. By default this option is selected, which means that only the first offer that becomes eligible on a page is presented and rest of the offers are not considered.

2. Add and Activate Offers

Order	Name	Active	Start Date	End Date
1	Chat Offer	Yes		
2	Proactive Chat Offer	Yes		



Stop after one offer is presented

Change the order of offers

5. Click the **Save**  button. You can also click the **Save and Close** button to save the changes and close the window.


Removing Offers From Web Pages

To remove an offer from a web page:

1. Go to the Web Pages screen.
2. Click the name of the page or select a page and click the **Edit**  button.
3. In the Web Page: *Page_Name* window, in the Add and Activate Offers section, select the offer you want to remove. You can select multiple offers.
4. Click the **Remove**  button.

Deleting Web Pages

To delete a web page:

1. Go to the Web Pages screen.
2. Select the web page or pages to be deleted.
3. Click the **Delete**  button. When prompted, confirm the deletion.

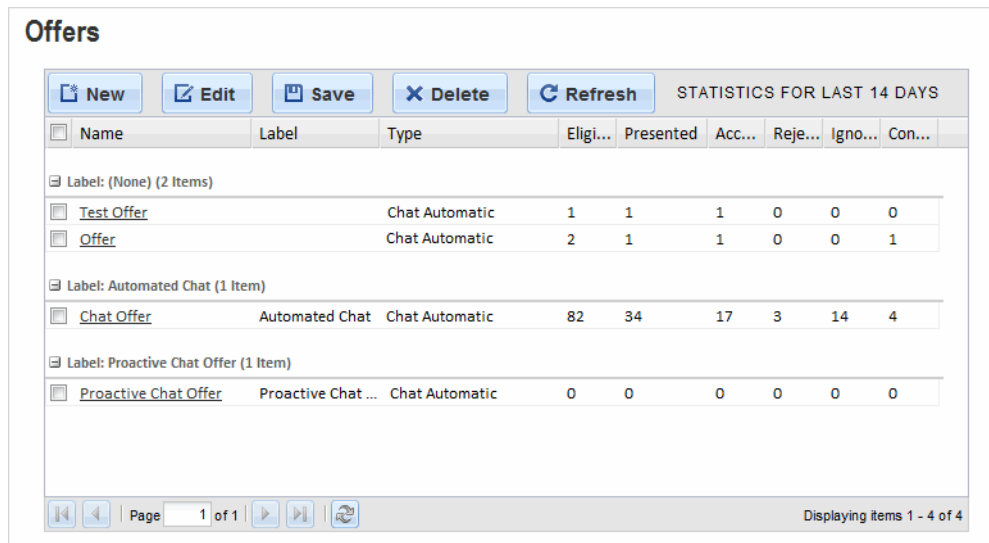
6 Offers

- ▶ [Viewing List of Offers](#)
- ▶ [Creating Offers](#)
- ▶ [Creating Offers for A/B Testing](#)
- ▶ [Editing Offers](#)
- ▶ [Assigning Offers to Web Pages](#)
- ▶ [Activating Offers](#)
- ▶ [Removing Offers From Web Pages](#)
- ▶ [Deleting Offers](#)

This chapter will assist you in understanding how to configure offers.

Viewing List of Offers

Clicking the **Offers** button in the Offers Console toolbar brings up a list of all the offers that have been created in the system.



Offers

STATISTICS FOR LAST 14 DAYS

<input type="checkbox"/>	Name	Label	Type	Eligi...	Presented	Acc...	Reje...	Igno...	Con...
Label: (None) (2 Items)									
<input type="checkbox"/>	Test Offer		Chat Automatic	1	1	1	0	0	0
<input type="checkbox"/>	Offer		Chat Automatic	2	1	1	0	0	1
Label: Automated Chat (1 Item)									
<input type="checkbox"/>	Chat Offer	Automated Chat	Chat Automatic	82	34	17	3	14	4
Label: Proactive Chat Offer (1 Item)									
<input type="checkbox"/>	Proactive Chat Offer	Proactive Chat ...	Chat Automatic	0	0	0	0	0	0

Page 1 of 1 | | Displaying items 1 - 4 of 4

View list of offers

The fields that are displayed are:

- ▶ **Name:** Name of the offer.
- ▶ **Label:** Label created for the offer. This is the only field that can be edited from the list view.
- ▶ **Type:** Type of offer.
- ▶ **Eligible:** Number of offers that became eligible.
- ▶ **Presented:** Number of times the offer was presented.
- ▶ **Accepted:** Number of times the offer was accepted.
- ▶ **Rejected:** Number of times the offer was rejected.
- ▶ **Ignored:** Number of times the offer was ignored.
- ▶ **Converted:** Number of times the chat offer was converted. An offer is considered converted, when the agent clicks the **Converted** button in the Agent Console. This button is available for chats started through offers.



Note: Statistics for the last 14 days are presented here.


If there are more than 10 items in the list, information is displayed on multiple pages. You can move between the pages using the **Previous Page**, **First Page**, **Next Page**, and **Last Page** buttons.

The list view can be customized. See [“Changing List View”](#) on page 14

Creating Offers

Creating Offers

To create an offer:

1. Go to the Offers screen.
2. Click the **New**  button.
3. In the New Offer window, start by provide the following details.
 - **Name:** Name of the offer.
 - **Label:** A label for the offer. Labels are used to group offers.
 - **Notes:** Internal notes for the offer.

New Offer



1. Provide General Details

Name *
Chat offer to visitors on banking page (5 sec)

Label
Automated chat

Notes

Provide the name and label for the offer

4. In the Select Offer Type section of the page, set the following:
 - **Offer type:** Select an offer type. The option available is Chat Automatic.
 - **Re-offer on accept:** Select this option if you want to present the same offer again if the offer was accepted once during the session. The time after which the offer is presented again is set in the **Offers - Interval for Re-offering Accepted Offers** setting configured from the Administration Console.
 - **Limit the number of re-offers to:** Select this option to define the number of times you want to re-offer an accepted offer.
 - **Re-offer on reject:** Select this option if you want to present the same offer again if the offer was rejected once during the session. The offer is presented when it becomes eligible again.
 - **Limit the number of re-offers to:** Select this option to define the number of times you want to re-offer a rejected offer.

- **Sticky:** Select this option if you want the offer to always stay on the page as long as the web site visitor stays on that page. The offer does not automatically disappear when the user accepts or ignores it. It is only removed from the page when the user explicitly rejects the offer.

2. Select Offer Type

Offer Type *

Chat Automatic

Re-Offer on Accept

Limit the number of re-offers to

1


Re-Offer on Reject

Limit the number of re-offers to

2

Sticky

Select offer type

5. In the Create Eligibility Conditions section, do the following:
 - a. Click the **Add**  button.
 - b. In the Condition window, set the following:
 - **Type:** Select from - Time on site in seconds, Time on page in seconds, Time on field in seconds, Value of field, Referer URL, and Value of expression.
 - **Operand:** This field is enabled for Time on field, Value of field, and Value of expression types of conditions.
 - **Operator:** Select from - Equal to, Greater than, Greater than or equal to, Less than, Less than or equal to, Not equal to, Does not contain, Contains, Begins with, Ends with.
 - **Value:** Set the value for the condition. For example, for Value in field, specify the value the condition should check for, and for Time on page, specify the time after which a customer qualifies for an offer. The time value is set in seconds.

Condition

Add Condition

Type *

Time on page in seconds

Operand

Operator *

Greater than

Value *

5

Done

Configure eligibility conditions

Click the **Done** button.

To delete an eligibility condition, select the condition and click the **Delete** ✕ button. To edit one, select the condition and click the **Edit** button.

- c. Specify whether all the conditions must be met for a customer to qualify for the offer, or if any one of the condition will suffice. Choose from **All conditions**, or **Any condition**.

3. Create Eligibility Conditions

Condition	Operator	Value
<input type="checkbox"/> Time on site in seconds	Greater than	30
<input type="checkbox"/> Time on page in seconds	Greater than	5

Match

All conditions

Any condition

Create eligibility conditions

- 6. In the Design Banners section, set the following:

4. Design Banners

Number of Banners to use (Use two for A/B testing)

One

Two

Banner A

Template *

Text

Tahoma **B** **I** **U** **A** **A** **A** **ab**

Offer URL *

Offer URL Target Window *

Style *

Design the banner for the offer

- **Number of Banners to Use:** Select **One**. The option of configuring two banners must be used only for A/B testing. See [“Creating Offers for A/B Testing”](#) on page 40.
- **Template:** From the dropdown list, select a template. To see how the templates look, click the **View Templates** link and in the Templates window see the available templates. If you know the name of the template you are looking for, type the name in the **Filter** field. Clear the **Filter** field to see all the templates.
- **Text:** Type the text to be presented on the offer window. Use the text editor tools to format the text.

- **Offer URL:** Provide the URL that the offer should point to. This is the URL to the chat entry point prepared for offers (page 21). You need to get this link from the Administration Console.
- **Offer URL Target Window:** Specify if the offer URL should open in a new window or in the same window where the offer is presented. For offer URLs that open in a new window, you can also configure the following properties of the new window. Click the **Configure** button.

In the Offer URL Target window, set the following properties for the target window. All values are in pixels.

- **Position from Left:** Position of the offer URL target window from the left of the screen.
- **Position from Top:** Position of the offer URL target window from the top of the screen.
- **Height:** Height of the offer URL target window.
- **Width:** Width of the offer URL target window.

The screenshot shows a window titled "Offer URL Target Window" with a close button in the top right corner. Inside the window, there is a section titled "Configure Target Window" containing four input fields with the following values: "Position From Left" (100), "Position From Top" (150), "Height" (500), and "Width" (700). A "Done" button is located at the bottom left of the window.

Configure properties for the target window

- **Style:** Select a position on the web page where the offer should be presented. The options available are:
 - Bottom Left
 - Bottom Right
 - Center
 - Top Left
 - Top Right
 - Relative

Click the **Configure** button next to the **Style** field to configure additional properties.

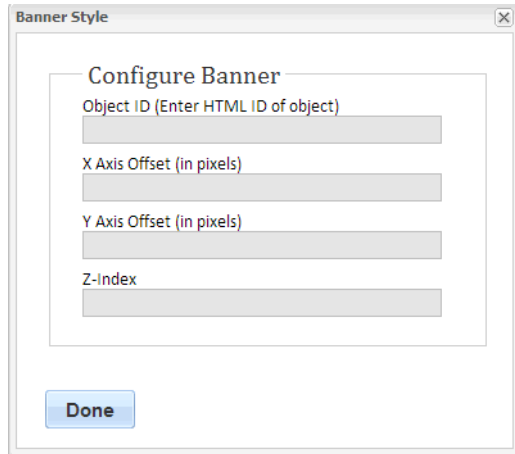
In the Banner Style window, set the following.

- **Z-Index:** This defines the stack order of the elements. Set this property to create overlapping elements.

The following three options are enabled only if you have set the style as **Relative**.

- **Object ID:** Provide the HTML ID of the object relative to which the offer is placed.
- **X Axis Offset:** Define in pixels the placement of the relative offer from the top of the screen.

- **Y Axis Offset:** Define in pixels the placement of the relative offer from the left of the screen.

A screenshot of a 'Banner Style' dialog box. The dialog has a title bar with a close button. Inside, there is a section titled 'Configure Banner' with four input fields: 'Object ID (Enter HTML ID of object)', 'X Axis Offset (in pixels)', 'Y Axis Offset (in pixels)', and 'Z-Index'. A 'Done' button is located at the bottom left of the dialog.

Configure the banner style

7. Click the **Preview** link to see what the offer will look like.
8. Click the **Save** button. The page is refreshed and you see the option to assign offers to web pages. See [“Assigning Offers to Web Pages” on page 41.](#)

Creating Offers for A/B Testing

A/B testing enables you to compare the relative effectiveness of two different offers for the same eligibility conditions.

With A/B testing, each of these offers is presented randomly to visitors who meet the eligibility criteria. You can assign a percentage weight to each banner used in A/B testing to specify how often each banner should be presented. The acceptance and conversion rates of each offer tells you which offer is more effective.

To create an offer for A/B testing:

1. Follow all the steps in [“Creating Offers” on page 36.](#)
2. In the Design Banners section, in the **Number of Banners to Use** field, select **Two** and configure both the banners.

3. In the A/B Testing section use the sliding scale to assign a percentage weight to each banner used in A/B testing. By default a 50% weight is assigned to each banner.

4. Design Banners

Number of Banners to use (Use two for A/B testing)

One

Two

A/B Testing

Banner A Banner B

Banner A 40%

Banner B 60%

Create an offer for A/B testing


Editing Offers

Until an offer is activated or scheduled, all fields can be edited. Once an offer has been activated or scheduled, only a subset of edit options are available. You can:

- ▶ Add and remove the web pages to which the offer is assigned.
- ▶ Change the label from the Offers List View.

You can always create a copy of an existing offer and build a new offer from it.


To edit an offer:


1. Go to the Offers screen.
2. Select an offer and click the **Edit**  button or just click the name of the offer. From other screens, such as the Dashboard or Web Pages, click the name of the offer.
3. In the Offer details window that opens, view the offer details and edit the properties of offers that have not been activated for any page. For offers that have been activated at least once, you can only add or remove the web pages where offers are presented. Other properties cannot be modified.
4. Click the **Copy** button and create a new offer from an existing one. You can edit the properties of the copied offer and build a new offer from an existing one.

Assigning Offers to Web Pages

After creating an offer, assign the offer to the web pages on which the offer is to be presented.

To assign offers to web pages from the Offers screen:

1. Go to the Offers screen.
2. Click the name of the offer or select an offer and click the **Edit**  button.

3. In the Offer: *Offer_Name* window, in the Add to Web Pages section, do the following.
 - a. Click the **Add**  button.



Assign offer to web pages

- b. From the Web Pages window, select the web pages on which the offer should appear and click the **Add Selected and Close** button.


The web pages are added to the Offer: *Offer_Name* window.
4. Close the Offer: *Offer_Name* window.

After assigning an offer to a page, you need to activate it.

Activating Offers

After offers are associated with web pages, you need to activate them. You can also set a publish date and expiry date for an offer. Offers can be activated and deactivated in real-time.

To activate an offer:

1. Go to the Web Pages screen.
2. Click the name of the page or select a page and click the **Edit**  button.
3. In the Page: *Page_Name* window, in the Add and Activate Offers section, click in the **Active** field. From the dropdown list:
 - Select **Yes** to activate the offer.
 - Select **Scheduled** to set a publish date and expiry date for the offer.

- Select **No** to deactivate an offer.

2. Add and Activate Offers

Order	Name	Active	Start Date	End Date
1	Chat Offer	Yes		
2	Proactive Chat Offer	Scheduled		

Stop after one offer is presented

Buttons: Save and Close, Save, Close

Activate offers for web pages

4. Click the **Save** button. You can also click the **Save and Close** button to save the changes and close the window.

Removing Offers From Web Pages

To remove offers from a web page:

1. Go to the Offers screen.
2. Click the name of the offer or select an offer and click the **Edit** button.
3. In the Offer: *Offer_Name* window, in the Add to Web Pages section, select the web pages you want to remove. You can select multiple pages.
4. Click the **Remove** button.

Deleting Offers

An offer cannot be deleted if it is associated with a web page.

To delete an offer:

1. Go to the Offers screen.
2. Select the offer to be deleted. You can select multiple offers.
3. Click the **Delete** button. When prompted, confirm the deletion.