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(54) **METHOD, SYSTEM AND APPARATUS FOR ESTABLISHING AND MONITORING SESSIONS WITH CLIENTS OVER A COMMUNICATION NETWORK**

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H04L 12/24 (2006.01)
G06Q 30/02 (2006.01)

(52) **U.S. Cl.**

CPC **H04L 51/046** (2013.01); **H04L 67/22** (2013.01); **G06F 3/0481** (2013.01); **G06Q 30/0633** (2013.01); **H04L 41/22** (2013.01); **G06Q 30/0277** (2013.01); **G06F 2203/04803** (2013.01); **G06F 3/04847** (2013.01)

(71) Applicant: **LiveHelpNow LLC**, Quakertown, PA (US)

(72) Inventor: **Michael KANSKY**, Doylestown, PA (US)

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(57) **ABSTRACT**

Systems and methods provide real-time communication between website operators and website visitors including monitoring, gathering, managing and sharing of information. The features include: simultaneous chatting with system's website visitor while responding/submitted tickets/emails and searching through company knowledge base; operator communicating message to another operator directly in active chat session, while message remains hidden to visitors/customers; displaying advertising messages to visitors/customers within chat window during active chat sessions; growing knowledge base by adding information into knowledge base during chat session; providing real-time access to system's website visitor information by seeing the content of visitor's shopping cart or by passing information from system's server into visitor's information located in operator's panel; creating and branding multiple chat windows and selectively linking all or some to the account; tagging and grouping each chat sessions; parent-child ticketing for project management; lead scoring; and mobile live chatting.

Related U.S. Application Data

(63) Continuation of application No. 15/420,893, filed on Jan. 31, 2017, now Pat. No. 10,419,372, which is a continuation of application No. 14/880,353, filed on Oct. 12, 2015, now Pat. No. 9,584,375, which is a continuation of application No. 13/328,691, filed on Dec. 16, 2011, now Pat. No. 9,178,950.

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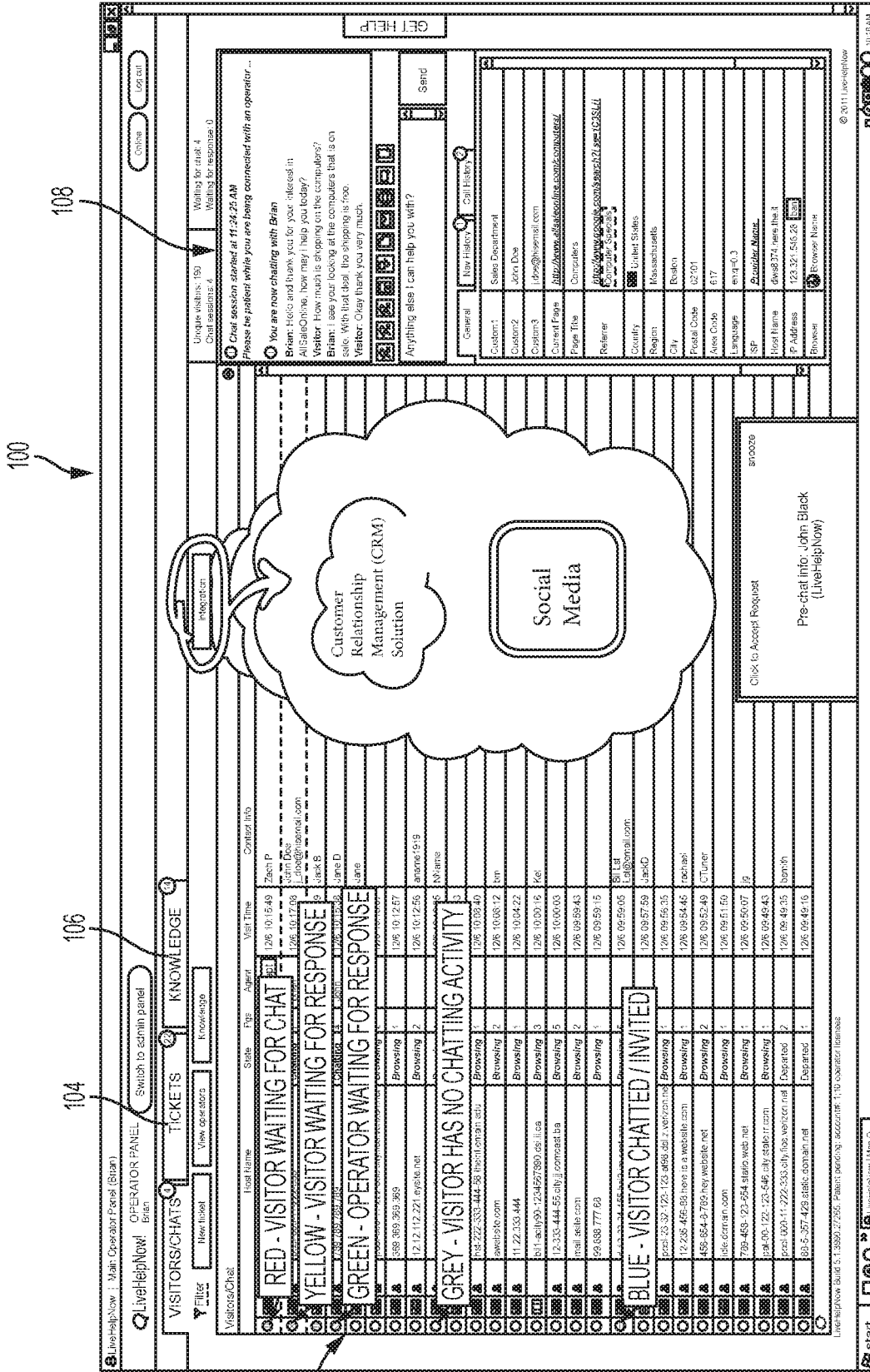


FIG. 1a

The image shows a HelpNow interface with several key components:

- NEW TICKETSM BUTTON LOCATION**: Located in the top left navigation area.
- KNOWLEDGE LOOKUPSM BUTTON LOCATION**: Located in the top left navigation area.
- LOCATION OF CHAT WINDOW (VISITORCHATS TAB)**: Points to the chat window area on the right.
- COLOR CODED STATUS ICONS**: A legend at the bottom left explaining the status of visitors.
- VISITORS/CHATS**: A list of active visitors with columns for Agent, Page, State, and Contact Info.
- CHAT WINDOW**: A text input area on the right with a "Send" button.
- USER PROFILE**: A detailed view of the selected visitor's information.

Agent	Page	State	Visit/Chat Time	Contact Info
	1	Browsing	12/14 15:37:45	
	1	Browsing	12/14 15:37:31	gpatllmays
	1	Browsing	12/14 15:37:08	lucys
	1	Browsing	12/14 15:37:04	
	3	Browsing	12/14 15:36:38	
	1	Browsing	12/14 15:36:01	
	3	Browsing	12/14 15:35:02	
	5	Browsing	12/14 12:54:57	east_west
	3	Browsing	12/14 09:20:30	sales@mbp.com
	3	Browsing	12/14 09:45:46	AV058
	6	Browsing	12/14 09:27:18	e@veterillo.com
	3	Browsing	12/14 08:23:38	sgart
	3	Browsing	12/14 07:59:48	enire
	13	Browsing	12/14 07:48:13	mbast
	1	Departed	12/14 15:35:57	fyhdaddress
	1	Departed	12/14 15:35:44	review
	1	Departed	12/14 15:35:21	psket
	1	Departed	12/14 15:35:17	rewewe
	7	Departed	12/14 15:35:11	sonally
	1	Departed	12/14 15:35:11	6d8jgdebns
	1	Departed	12/14 15:35:11	6d8jgdebns
	1	Departed	12/14 15:35:11	6d8jgdebns
	1	Departed	12/14 15:35:10	lmal
	1	Departed	12/14 15:35:09	Ka R
	1	Departed	12/14 15:35:09	DianaZ
	1	Departed	12/14 15:35:08	6denfow
	1	Departed	12/14 15:35:08	tonumbt
	1	Departed	12/14 15:35:08	andfion
	1	Departed	12/14 15:35:08	6uz044

USER PROFILE:

- General**: New History, Call History
- Tools**: [Icons]
- Visitor Tag**: [Tag]
- Current Page**: [Page]
- Page Title**: [Title]
- Referer**: [Referer]
- Country**: [Country]
- Region**: [Region]
- City**: [City]
- Postal Code**: 06484
- Area Code**: 403
- Language**: en-US
- IP**: [IP]
- Host Name**: 676.25.171.105-host101.cpanel.net
- IP Address**: 79.23.171.185
- Browser**: IE7.0
- Platform**: Win7
- User-Entered**: Yes
- Session**: 1592X1290

FIG. 1b

HelpNow! OPERATOR PANEL Switch to admin panel

VISITORS/CHATS TICKETS CALLBACKS KNOWLEDGE

Now ticket View operators Knowledge lookup Integrations

Assigned to you: 0 Open out-unsassigned: 2 Open and assigned: 7

You can send a message to this visitor to invite him/her to Live Chat

Visitor has departed

Send

Notes: [unreadable]

Visitor Tag: [unreadable]

Current Page: [unreadable]

Page Title: [unreadable]

Referer: [unreadable]

Country: [unreadable]

Region: [unreadable]

City: [unreadable]

Postal Code: [unreadable]

Area Code: [unreadable]

Language: [unreadable]

IP Address: [unreadable]

Host Name: [unreadable]

Browser: [unreadable]

Platform: [unreadable]

Screen: [unreadable]

Location of chat window (Tickets Tab Selected)

"Get from chat" link (New Ticket)

Ticket ID	From	Status	Subject	Body	Priority	Category	Assigned	Askn	Date Created
265632	Red Den [red.den@az]	Open	Fwd: FW: AZ handle status	Reports for admin LFN	High	General	administrator	No	12/12/2011
26434	Tom [tom@az]	Working	Compo Analysis integration	Hi, I've attached below of this knowledge base article but it doesn't an	High	Support	administrator	Yes	12/13/2011
249806	Ken Rab [ken.rab@lightbulb]	Working	We would like to have Bing logs as an option in the Content list. Could you	We would very much like to have the ability to include markings in the Con...	High	Support	administrator	Yes	11/29/2011
265391	John Boy [john.boy@quest.com]	Working	Enhancement: Set View Access settings for a User during coedit	Enhancement: Set "view Access" settings for a user during user cr...	Medium	Support	administrator	Yes	12/05/2011
240051	John Boy [john.boy@quest.com]	Working	Custom Report Request	Hi, I would like to make a request for a custom report - mostly an enhan...	High	Support	administrator	Yes	11/22/2011

View 1,301 of 252

GET HELP DASHBOARD

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FIG. 1c

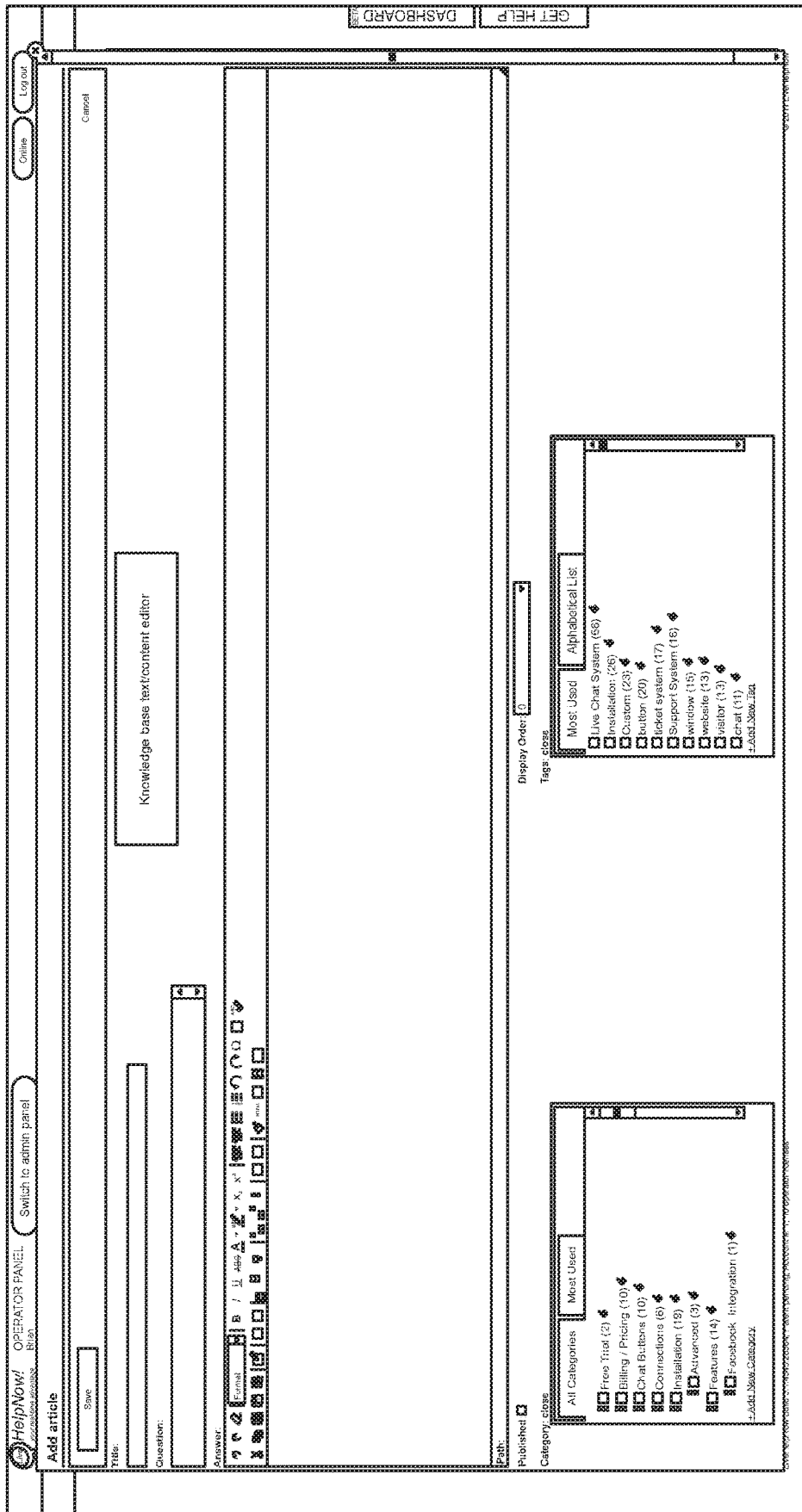


FIG. 1d

OPERATOR PANEL Switch to admin panel

GET HELP DASHBOARD

Without answers: 16
Not published: 37

You: Hello search knowledge

Run: http://radio.livehelpnow.net/article.aspx?center&id=14916

Chat session has been terminated

Chat session started at 4:12:37 PM

Please be patient. Our system is being connected with an operator...

You are now chatting with Brian

Brian: Hello and thank you for your interest in LiveHelpNow, please allow me a moment to review your question.

You: What are your prices? seen knowledge

Brian: <http://www.livehelpnow.net/faq.aspx?center&id=14916>

KNOWLEDGE

Basic search

Keyword:

Category:

Search All:

Basic search:

Knowledge Lockup

Can you recommend a staffing solution for your chat system?
Beginning in August we will be offering a staffing solution for our Live Chat system through a partnership. Chat staffing includes 24/7 coverage Small Business - \$276 Up to 200 chats per month \$1.67 per chat over 100 medium Sized Business - \$360 Up to 700 chat.

How much does LiveHelpNow cost?
LiveHelpNow help desk software consists of four core products: Live Chat System, Ticket System, Support System / Knowledge base management and Callback Management System. Live Chat System, Ticket System and Support System, each offered at \$21 per seat (agent) per month. Callback management.

Send

Call History

Full Name	Brian Smith
Email	bs@livehelpnow.com
Inquiring about	General info
Question	Do not accept
Custom2	Kelvin
Visitor Tag	PARA
Current Page	http://www.livehelpnow.com/
Page Title	Customer Service Software Help Desk Software LiveHelpNow
Referer	http://www.livehelpnow.net/faq.aspx?center&id=14916
Country	United States
Region	Pennsylvania
City	Millers Grove
Postal Code	19650
Area Code	717
Language	en-US
TSP	Prologix, Atlanta

OPERATOR PANEL Switch to admin panel

VISITORS/CHATS New ticket View operators Knowledge lockup Integrations

TICKETS Knowledge lockup Integrations

CALLBACKS Knowledge lockup Integrations

KNOWLEDGE

Search knowledge: LiveHelpNow

5 Views

320 Views

Send

Call History

OPERATOR PANEL Switch to admin panel

VISITORS/CHATS New ticket View operators Knowledge lockup Integrations

TICKETS Knowledge lockup Integrations

CALLBACKS Knowledge lockup Integrations

KNOWLEDGE

Search knowledge: LiveHelpNow

5 Views

320 Views

Send

Call History

FIG. 1e

HelpNow! OPERATOR PANEL Brian
 Switch to admin panel

VISITORS/CHATS **TICKETS** **CALLBACKS** **KNOWLEDGE**

Assigned to you: 1
 Open and unassigned: 2
 Open tickets: 10

Chat Window:
 Chat session has been terminated
 Chat session started at 4:12:31 PM
 Please be patient while you are being connected with an operator...
 Brian: Hello and thank you for your interest in LiveHelpNow, please allow me a moment to review your question.
 You: What are your prices? what knowledge
 Brian: <http://www.livehelpnow.com/pricing>
 Brian: <http://www.livehelpnow.com/knowledge>
 Brian: <http://www.livehelpnow.com>
 Chat session has been terminated
 Session Expires:

Search Knowledge (Tickets)

Ticket Details:
 Ticket ID: 266247
 Status: Open
 Your Name: Brian Smith
 Assigned to agent: Brian Smith
 Assigned to department: Help Desk

Ticket ID	From	Status	Subject	Body	Priority	Category	Assigned	Action	Date Created
265947	Brian Smith brian.smith@livehelpnow.com	Open	Phishing	What is your current pricing?...	High	General	admin		12/14/2011
265832	Ted Don ted.don@livehelpnow.com	Open	FW: FW: All hands allgo	Reports for email LFN..... Forwarded message..... from D.....	Medium	Email to subject	admin		12/12/2011
265434	Tom tom@livehelpnow.com	Working	Google Analytics integrator	Hi, I've already looked at this knowledge base article but it doesn't an...	High	General	admin		12/13/2011
265806	Kay Bob kay.bob@livehelpnow.com	Working	Integration	We would like to have Chat logs as an option in the Contact list (collection via...	High	Support	admin		11/26/2011
265381	John Bob john.bob@livehelpnow.com	Working	Enhancement: Set "View Access" settings for a User during creator.	Enhancement: Set "View Access" settings for a User during creator...	Medium	Support	admin		12/05/2011

General Information:
 Name: Brian Smith
 Email: brian.smith@livehelpnow.com
 Inquiring about: General info
 Question: Do Not Accept
 Case ID: 266247
 Contact info: brian.smith@livehelpnow.com
 User Tag: **RRRR**
 Current Page: <http://www.livehelpnow.com>
 Page Title: Customer Service Software Help Desk Software | LiveHelpNow
 Website: <http://www.livehelpnow.com>
 Country: United States
 Region: Pennsylvania
 City: Willow Grove
 Postal Code: 19090
 Area Code: 215
 Language: en-US

GET HELP | DASHBOARD

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FIG. 1f

OPERATOR PANEL
Blair

Switch to admin panel

KNOWLEDGE

VISITORS/CHATS

New ticket

TICKETS

View operators

CALLBACKS

Knowledge lookup

INTEGRATIONS

Knowledge

Article ID	Title	Order	Public	Rating	Views	Edited	Category
6739	Selfence Integration	0	Yes	5.0	596	03/15/2011	Integration, SalesForce
7019	Facebook Integration	0	Yes	5.0	910	03/08/2011	Features, Facebook Integration
6754	Operator panel custom tabs	0	Yes	5.0	413	08/17/2011	Live Chat System
4145	LiveHelpNow Wiki tabs	1	No	5.0	37	03/25/2011	General Questions
6274	Removing failed link	1	Yes	5.0	748	08/27/2011	Chat Buttons
1574	Can your system be used with dynamic and secure w	1	Yes	5.0	575	03/07/2011	General Questions
1592	Will it be used automatically each month?	1	Yes	5.0	536	03/07/2011	Billing / Pricing
1592	How do I view the Browsing History for a visitor?	1	Yes	5.0	535	03/07/2011	Features
1593	Chatting with multiple customers at the same time	1	Yes	5.0	548	08/17/2011	Live Chat System
1732	Department Routing	1	Yes	5.0	1348	04/19/2011	Features
1712	Live Chat auto invitation	1	Yes	5.0	883	11/30/2011	Live Chat System
1714	Mobile Chat - Live Chat for Mobile	1	Yes	5.0	1213	03/04/2011	Billing / Pricing
1581	How do I use Pre Chat requirements?	2	Yes	5.0	447	08/29/2011	Live Chat System
1578	Can you have a chat button on a page that is not a	2	Yes	5.0	727	03/04/2011	Live Chat System
1739	Customer invitation to chat	4	Yes	5.0	1207	11/26/2011	Live Chat System
1526	LiveHelpNow Help Desk software is different	5	Yes	5.0	566	07/19/2011	General Questions
1694	Installation on a Flash based website	9	Yes	5.0	620	03/04/2011	Installation
1715	Invitation to chat and live chats	11	Yes	5.0	710	11/30/2011	Installation
2018	Data collection and storage	22	Yes	5.0	926	03/14/2011	General Questions
1638	Custom information feed	23	Yes	5.0	728	03/04/2011	Features
2367	How do I see the chat history of an online chat request	12	Yes	5.0	469	03/04/2011	Live Chat System
1355	How do I add the chat feature to my website?	0	Yes	5.0	1653	07/11/2011	Installation
2780	How to disable chat invitation door bell sound	27	Yes	5.0	451	03/04/2011	Live Chat System
3169	Custom Live Chat Buttons	1	Yes	5.0	1266	03/03/2011	Chat Buttons
1545	Can my agents handle more than one chat at a time?	13	Yes	5.0	2159	03/04/2011	Live Chat System
1699	Installation on multiple websites	1	Yes	5.0	1332	06/16/2011	Live Chat System, Customization, Chat Windows
4916	LiveHelpNow pricing	1	Yes	5.0	3285	08/11/2011	Billing / Pricing
1572	Enable/Disable setup	0	Yes	5.0	414	02/25/2011	Installation

Pages: 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 32 33 34 35 36 37 38 39 40 41 42 43 44 45 46 47 48 49 50 51 52 53 54 55 56 57 58 59 60 61 62 63 64 65 66 67 68 69 70 71 72 73 74 75 76 77 78 79 80 81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 100

View 1-30 of 187

Search Knowledge Link

Chat Window Location (Knowledge Tab)

Without answers: 19
Not published: 37

You: Blair
Hello each knowledge
Blank: http://www.livehelpnow.com/helpdesk.aspx?chat=1&chat=1&id=1516
Blank: http://www.livehelpnow.com/helpdesk.aspx?chat=1&chat=1&id=1516

Chat session has been terminated
Please do not write your are being connected with an operator...
Blair: Hello and thank you for your interest in LiveHelpNow, please allow me a moment to review your question
Blair: Your: What are your questions knowledge
Blank: http://www.livehelpnow.com/helpdesk.aspx?chat=1&chat=1&id=1516

Notes: Brian Smith
Full Name: Brian Smith
Email: bsl@livehelpnow.com
Inquiring about: General Info
Conversation: US Not Accepted
Custom2: kateem
Visitor tag: PARRA
Current Page: Customer Service Software | Help Desk Software | LiveHelpNow
Referrer: http://www.livehelpnow.net/helpdesk/admin_panel.aspx
Country: United States
Region: Pennsylvania
City: Allentown, PA
Postal Code: 18100
Area Code: 215
Language: en-US
ISP: Prodigy Online

GET HELP? DASHBOARD

FIG. 19

The screenshot displays a LiveHelpNow chat interface. At the top, there's a navigation bar with 'Main: Operator Panel (Brian)', 'OPERATOR PANEL', 'Switch to admin panel', 'LOGOUT', and 'Log out'. Below this is a secondary bar with 'LIVEHELPNOW', 'OPERATOR PANEL', 'Brian', 'TICKETS', 'KNOWLEDGE', 'View operators', and 'Knowledge'. The main interface is divided into several sections:

- Visitors/Chats:** A list of active chats with columns for 'Host', 'Agent', 'Visit Time', and 'Status'. The first chat is highlighted, showing 'Host: 126.101.19.49' and 'Agent: Zash P.'. Other chats are listed below, including one from 'John Doe' and another from 'Liam@normal.co'.
- Chat Window (200):** A large text area for the selected chat. It shows a conversation where the visitor asks for help with a plugin, and the agent responds with a link and offers to assist. The agent's name 'Brian' is visible at the bottom of the chat window.
- Visitor Profile (206):** A panel on the right side of the chat window. It contains fields for 'Customer1' (Sales Department), 'Customer2' (John Doe), 'Customer3' (jdoe@normal.com), 'Current Page', 'Page Title', 'Referer', 'Country', 'Region', 'City', 'Postal Code', 'Area Code', 'Language', 'SP', 'Host Name', 'IP Address', and 'Browser Name'. Each field has a small search icon next to it.
- Integration (202):** A section below the chat window with a 'Send' button and a 'Pre-chat info: John Black (LiveHelpNow)' field.
- Footer:** At the bottom, there's a status bar with 'LiveHelpNow Build 5.1.3350/27256; Path: /; Agent: Brian; 10 operator licenses' and 'start' button.

A callout bubble (204) points to the chat window, containing the text: "With LiveHelpNow's patent pending technology called 'Whisper', you can now silently connect to an active chat session and coach your agents in real time."

FIG. 2a

HelpNow! OPERATOR PANEL Switch to admin panel

Without answers: 16
Not published: 37
Total articles: 187
Total published: 150

Operator: **BERN GRINBERG**

Operator ID: 6738

Order: 0
Public: Yes

Integration: 0
Facebook Integration: Yes

Operator panel refresh rate: 0
Operator panel refresh rate: Yes

Live-Chat System: 413
Live-Chat System: Yes

General Questions: 37
General Questions: No

Chat Buttons: 748
Chat Buttons: Yes

General Questions: 536
General Questions: Yes

Billing / Pricing: 575
Billing / Pricing: Yes

Features: 565
Features: Yes

Live-Chat System: 845
Live-Chat System: Yes

OPERATOR PANEL

View operators | Knowledge lookup | Integrations

TICKETS | Callbacks

View tickets | Knowledge lookup | Integrations

KNOWLEDGE

Help Desk

Operator: **BERN GRINBERG**

Operator ID: 6738

Order: 0
Public: Yes

Integration: 0
Facebook Integration: Yes

Operator panel refresh rate: 0
Operator panel refresh rate: Yes

Live-Chat System: 413
Live-Chat System: Yes

General Questions: 37
General Questions: No

Chat Buttons: 748
Chat Buttons: Yes

General Questions: 536
General Questions: Yes

Billing / Pricing: 575
Billing / Pricing: Yes

Features: 565
Features: Yes

Live-Chat System: 845
Live-Chat System: Yes

CHAT HISTORY

Full Name: Brian Smith
Email: bsmith@helpnow.com

Inquiring about: General info

Custom2: Do Not Accept

Custom3: Kulturen

Visitor ID: P P P P P P

Current Page: [http://www.helpnow.com/helpnow.html](#)

Page Title: Customer Service Software | Help Desk Software | Live-Chat System

Referer: [http://www.helpnow.com/helpnow.html](#)

Country: United States

Region: Pennsylvania

City: Willow Grove

Postal Code: 19091

Area Code: 215

Language: en-US

ISP: Roadster Networks

Responding to whisper & Internal agent to agent chat

Operator: **BERN GRINBERG**

Operator ID: 6738

Order: 0
Public: Yes

Integration: 0
Facebook Integration: Yes

Operator panel refresh rate: 0
Operator panel refresh rate: Yes

Live-Chat System: 413
Live-Chat System: Yes

General Questions: 37
General Questions: No

Chat Buttons: 748
Chat Buttons: Yes

General Questions: 536
General Questions: Yes

Billing / Pricing: 575
Billing / Pricing: Yes

Features: 565
Features: Yes

Live-Chat System: 845
Live-Chat System: Yes

CHAT HISTORY

Full Name: Brian Smith
Email: bsmith@helpnow.com

Inquiring about: General info

Custom2: Do Not Accept

Custom3: Kulturen

Visitor ID: P P P P P P

Current Page: [http://www.helpnow.com/helpnow.html](#)

Page Title: Customer Service Software | Help Desk Software | Live-Chat System

Referer: [http://www.helpnow.com/helpnow.html](#)

Country: United States

Region: Pennsylvania

City: Willow Grove

Postal Code: 19091

Area Code: 215

Language: en-US

ISP: Roadster Networks

FIG. 2b

HelpNow! OPERATOR PANEL

Switch to admin panel

Viewers: 16

Without answers: 16

Not published: 3

Help: search knowledge

OPERATOR PANEL

Viewers: 16

Without answers: 16

Not published: 3

Help: search knowledge

Whisper Technology

LiveHelpNow

Chat session started at 4:12:31 PM

Please be patient while you are being connected with an operator...

You are now chatting with Brian

Brian: Hello and thank you for your interest in LiveHelpNow, please allow me a moment to review your question.

You: What are your prices?

Brian: Hello, LiveHelpNow is a SaaS solution. You can use it on your website or in your application. It is powered by LiveHelpNow.

Powered by LiveHelpNow

GET HELP

DASHBOARD

Send

Notes

Full Name: Brian Smith

Email: bsmith@whisper.com

Inquiring about: General info

Question: Do NOT Accept

Customer: Brian

Viewer ID: 16888

Current Page: http://www.whisper.com/helpnow

Page Title: Customer Service Software | Help Desk Software | LiveHelpNow

Referer: http://www.whisper.com/helpnow/helpnow.html

Country: United States

Region: Pennsylvania

CITY: Willow Grove

Postal Code: 19150

Area Code: 215

Language: en-US

IPSP: Frontier.Nova

FIG. 2c

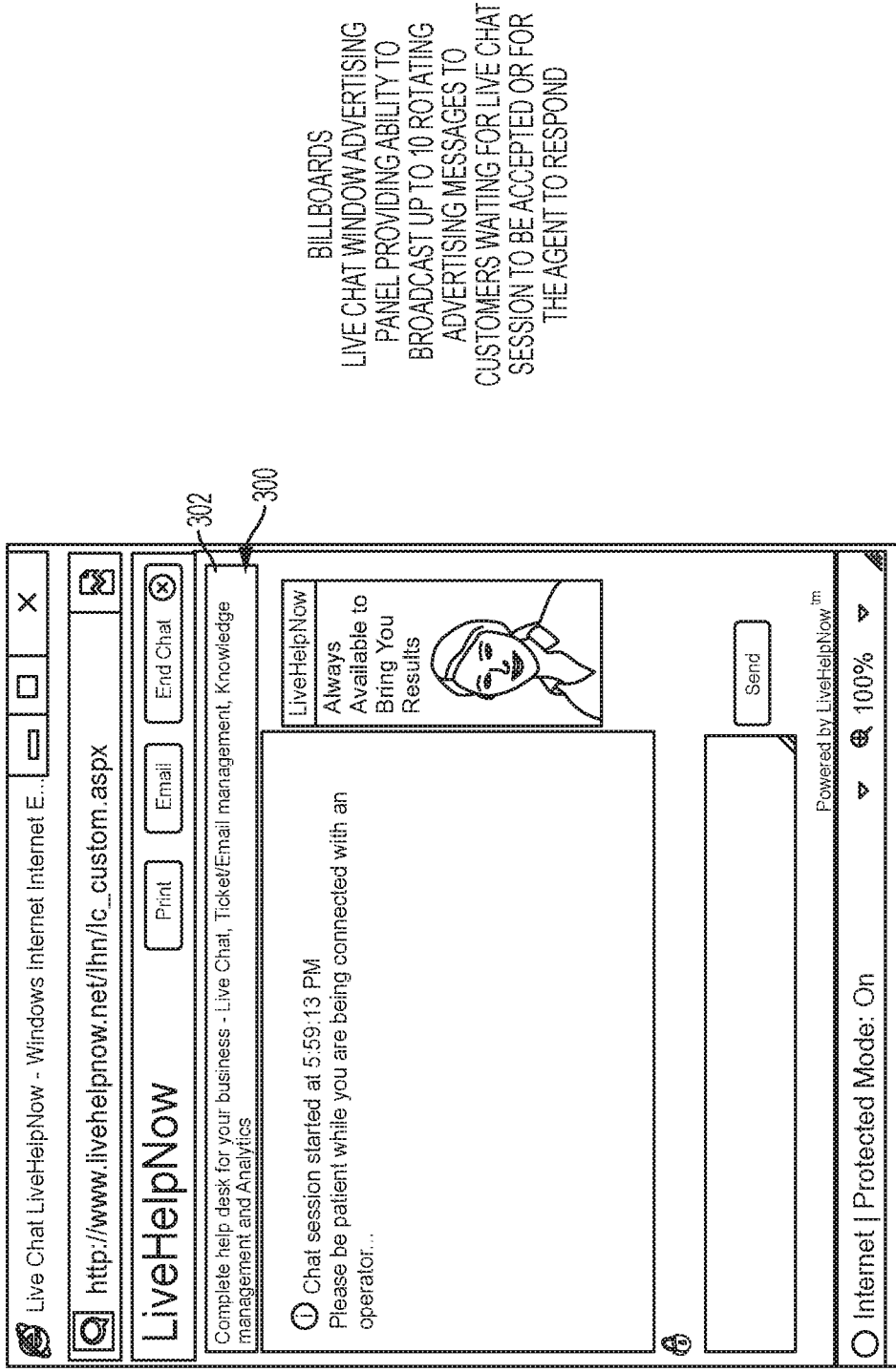


FIG. 3

Administrative - Support
 help@allsaleonline.com
 Web Site Gallery
AllSaleOnline
 HOME PRODUCTS PRICES DOWNLOAD INDUSTRY FOCUS LOGIN

Support Center
 Search by Keyword
 Search by Category
 Search by Advanced Search

Support Center
 Knowledge Base
 Submit New Ticket
 View Existing Ticket

Support Links
 Home

Account Login

Knowledge Base
 Submit a Ticket

Latest Knowledge Article
 • How much is standard shipping?
 • Do you have a catalog?
 • How do I create an account?
 • How do I change my password to my account?
 • What happens if my order is never delivered?

Popular Knowledgebase Article.
 • What is your return policy?
 • What computer brands do you sell?
 • What are your hours for customer support?
 • Is there a way to get free shipping?

Top Rated Knowledgebase Article.
 • Can I save my shopping cart?
 • Do you have any extended warranties?
 • What is your return policy?
 • What happens if my order is never delivered?
 • What if I get a damaged package?

Knowledge Base
 Article ID Title Author Public Rating Views Edited
 3592 How to get how to get free shipping? 0 Yes 3810/2010
 3159 How many hours for customer? 1 Yes 1015/2010
 4145 Do you have any extended warranties? 0 No 902/2010
 1598 What if I get a damaged package? 1 Yes 89 0/2010
 63 What is your return policy? 1 Yes 23 0/2010
 83 Can't save my shopping cart? 1 Yes 104/10/10
 69 What happens if my order is never 1 Yes 523 0/11/2010
 402 How do I change my password to 1 Yes 91 0/12/2010
 3712 How do I create an account? 1 Yes 524 01/26/2010
 1774 Do you have a catalog? 1 Yes 554 0/25/2010
 1735 How much is standard shipping? 4 Yes 557 0/25/2010
 1636 What computer brands do you sell? 5 Yes 422 05/19/2010
 1684 Phones 9 Yes 384 01/11/2010
 1716 Phone Plans 11 Yes 343 01/22/2010
 Network Installation 22 Yes 371 04/22/2010
 Computer Software 23 Yes 78 06/19/2010
 555 Gaming 9 Yes 546 08/06/2010
 187 PS3 vs Xbox 12 Yes 22 08/10/2010
 Account Termination 1 Yes 991 09/01/2010
 Sales Taxation 1 Yes 16 09/01/2010
 1573 Auto Inquiry 1 Yes 323 12/09/2010
 1545 Regular Programs 10 Yes 370 07/09/2010
 2789 Toy Planes 27 Yes 56 08/18/2010
 1627 What if I get a 0 Yes 53 05/19/2009
 1543 What if I get a 0 Yes 442 08/19/2008
 11 Movie Selections 0 Yes 951 09/09/2008

Operator Panel
 Switch to admin panel
 VISITORS/CHATS
 TICKETS
 KNOWLEDGE

Without answers: 4
 Not published: 24
 Total Articles: 111
 Not published: 87
 Chat session started at 11:24:25 AM
 Please be patient while you are being connected with an operator ...
 You are now chatting with Brian
 Brian: Hello and thank you for your interest in AllSaleOnline, how may I help you today?
 Visitor: How much is shipping on the computers?
 Brian: I see your looking at the computers that is on sale. With that deal, the shipping is free.
 Visitor: Okay thank you very much
 Anything else I can help you with?
 Send

General
 Nav History
 Call History
 Custom1 Sales Dept Inet
 Custom2 John Doe
 Custom3 John.Doe@allsaleonline.com
 Current Page All Sale Online Home Page
 Page Title Computers
 Referrer http://www.allsaleonline.com/Computers/...
 Country United States
 Region Massachusetts
 Zip Boston
 Postal Code 02101
 Free Code 617
 Language en-us-3
 IP 193.104.100.100
 Host Name 5-168374-100-100-11
 IP Address 193.104.100.100
 Browser Firefox/5.0

62010 AllSaleOnline.com powered by Livelihood WebSite Builder
 Total Articles: 111 | Total Views: 21800
 Live! powered by Livelihood WebSite Builder
 Account # 1, 10 operator licenses
 View 130 of 111
 Add article
 Live! powered by Livelihood WebSite Builder

FIG. 4a

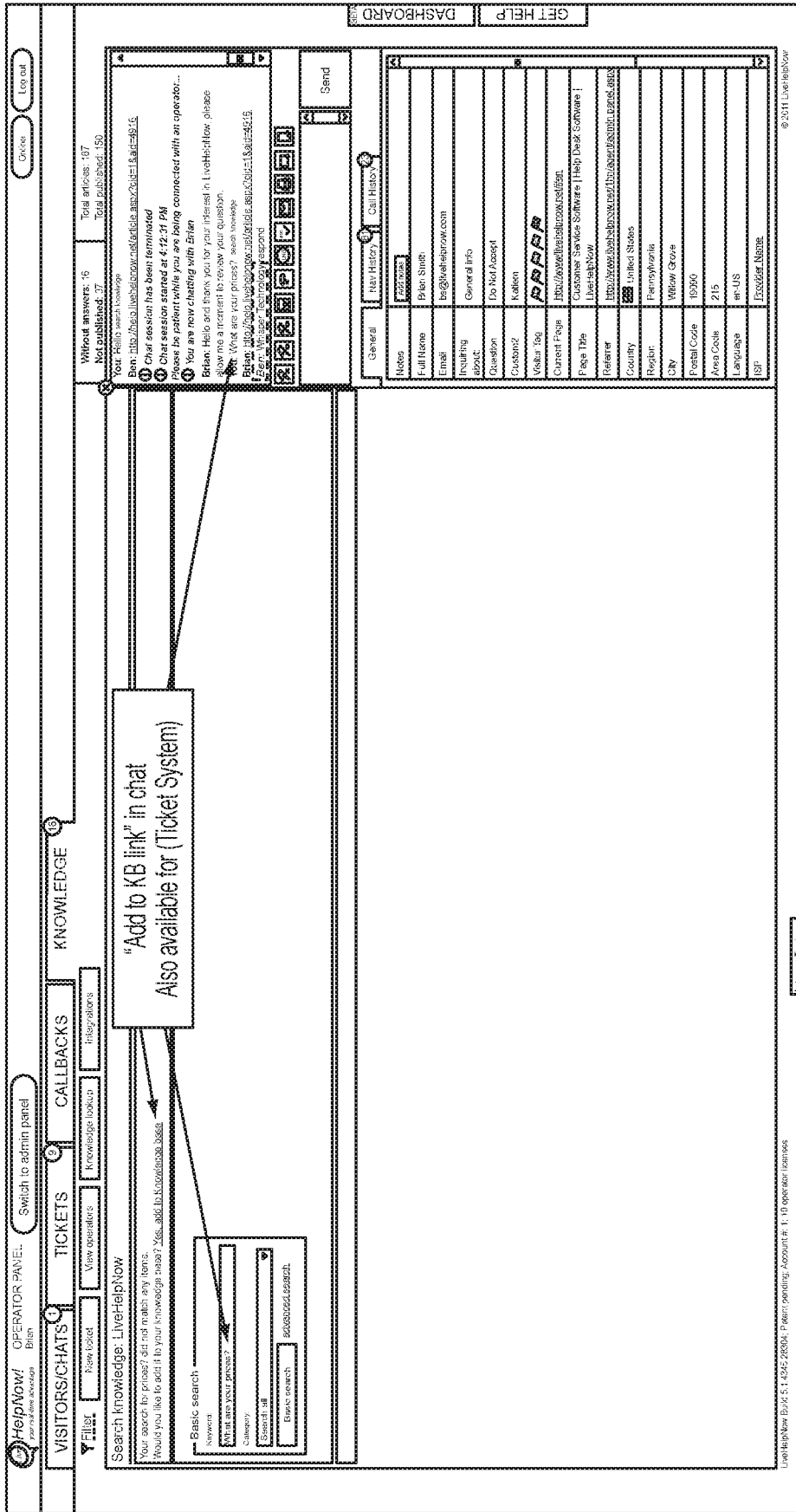


FIG. 4b

HelpNow! OPERATOR PANEL
Switch to admin panel

LOG OUT

VISITORS/CHATS

17

TICKETS

0

CALLBACKS

0

KNOWLEDGE

1

VIEW OPERATOR

KNOWLEDGE LOOKUP

INSPIRATIONS

ADD ARTICLE FROM

KB LINK

Article ID	Title	Order	KB Link	Category	Surveys	Billings / Pricing	Installation	Live Chat System, Usage	Live Chat System, Chat Windows	General Questions	General Questions	Chat Buttons	Live Chat System, Features	Advanced	General Questions	Live Chat System	Live Chat System	Live Chat System	Installation	Live Chat System	Live Chat System	Surveys	General Questions, Live Chat System, Ticket system, Support system, Callback Request	General Questions	Live Chat System	Installation	Live Chat System	Live Chat System, Features, Usage	Live Chat System, Chat Buttons	Free Trial	Customization, Advanced	Article, New, Published, Deleted
13185	What are your prices?	0		Surveys	395	12/14/2011																										
4816	Live HelpNow pricing	1	✓	Billings / Pricing	2120	12/14/2011																										
1627	Installation on WordPress	1	✓	Installation	24	10/20/2011																										
12103	Live HelpNow Secondary Whisker Technology	2	✓	Live Chat System, Usage	30	12/09/2011																										
12810	Chat Session Timeout	0	✓	Live Chat System, Chat Windows	16	12/09/2011																										
13043	Chat Buttons	0	✓	General Questions	10	12/09/2011																										
13042	Forgot Password	0	✓	General Questions	18	12/09/2011																										
11425	Adding chat button when all operators are offline	0	✓	Chat Buttons	174	12/01/2011																										
12854	Live HelpNow Brochure	0	✓	Advanced	13	12/01/2011																										
11426	Perform an action in a custom code before chat launch	0	✓	General Questions	584	11/29/2011																										
12825	How to secure a Live HelpNow Rescaler	0	✓	Live Chat System	770	11/29/2011																										
3374	Dynamic chat invitation	40	✓	Live Chat System	447	11/29/2011																										
3520	How to add a chat button to a page	1	✓	Installation	1206	11/29/2011																										
1715	Invitation to chat and flash objects	1	✓	Live Chat System	447	11/29/2011																										
4952	Adding the site with auto invitation rescaler	24	✓	Live Chat System	883	11/29/2011																										
1736	Customize invitation to chat	4	✓	Live Chat System	13	11/29/2011																										
2574	How to enable/disable automatic chat invitation	2	✓	Live Chat System	244	11/18/2011																										
1712	Live Chat Auto Invitation	1	✓	Live Chat System	5	11/09/2011																										
12768	Post chat survey	0	✓	Surveys	66	11/04/2011																										
10586	Account Makeover Sites	0	✓	General Questions, Live Chat System, Ticket system, Support system, Callback Request	321	10/14/2011																										
11581	Site information	0	✓	General Questions	71	10/14/2011																										
12279	Time Stamps	0	✓	Live Chat System	476	10/08/2011																										
1542	What are the Software Requirements for running the	0	✓	Installation	158	10/05/2011																										
12269	Chat Tagging explained	0	✓	Live Chat System, Features, Usage	171	10/05/2011																										
3116	Precing Live HelpNow chat button to user list	29	✓	Live Chat System, Chat Buttons	2	10/05/2011																										
12170	Feed	0	✓	Free Trial	158	10/05/2011																										
12130	Live HelpNow Live Chat code breakdown (for geeks)	0	✓	Customization, Advanced	171	10/25/2011																										
12112	Live HelpNow Article Software Download	0	✓	Article, New, Published, Deleted																												

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SQL Server Management Studio

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FIG. 4C

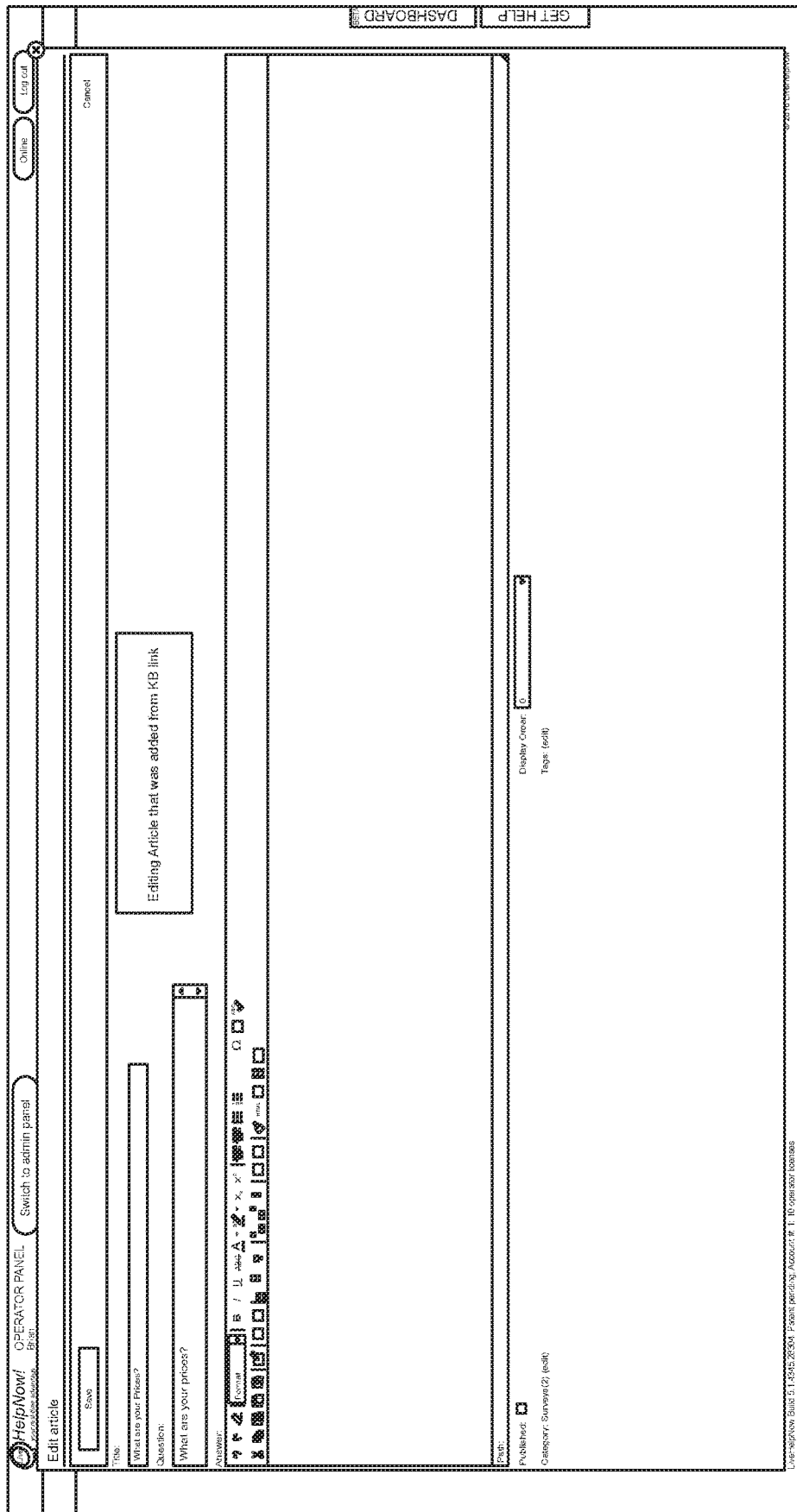
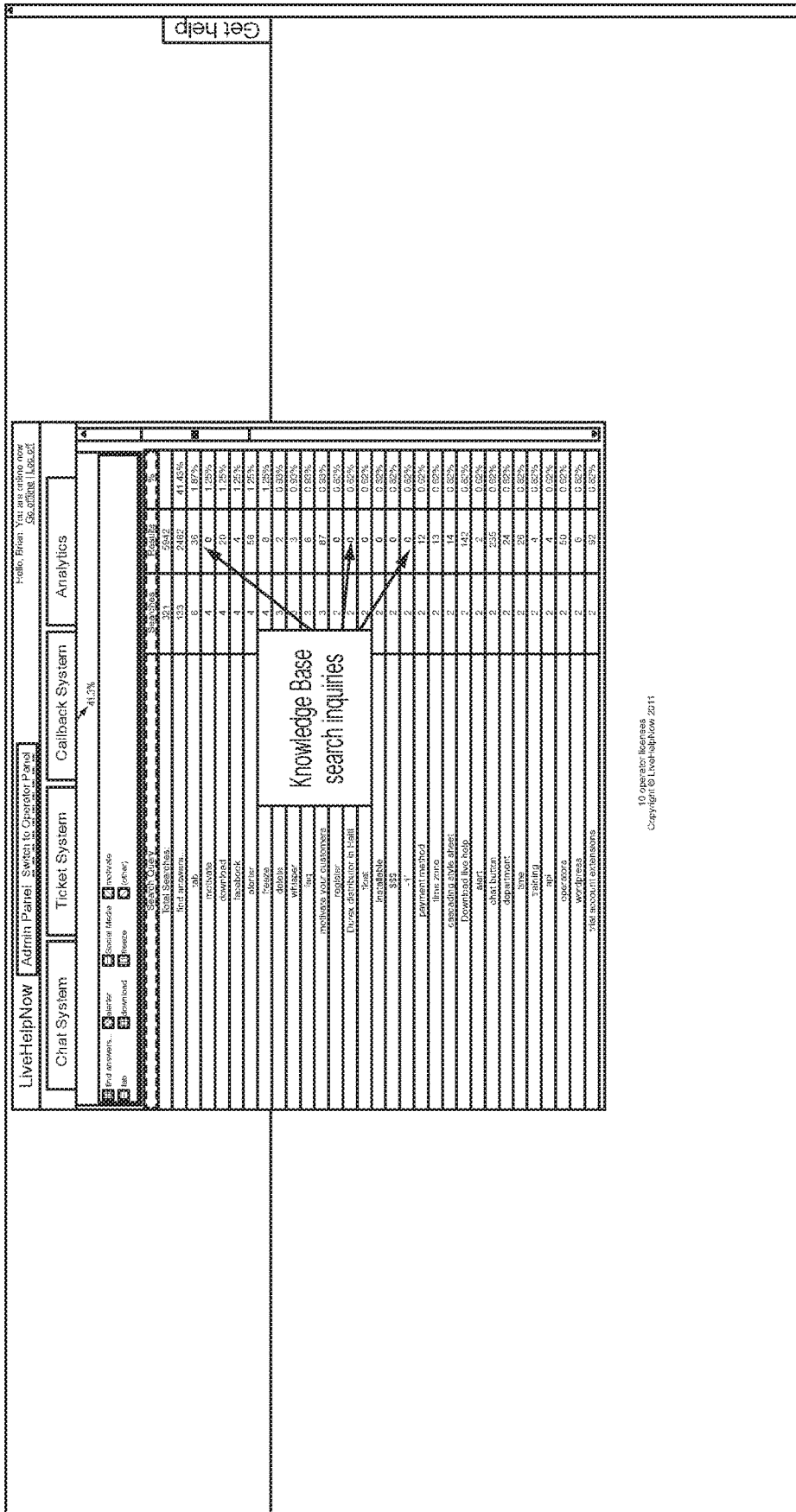


FIG. 4d



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FIG. 4e

LiveHelpNow | Main Operator Panel (Brian)
OPERATOR PANEL
Switch to admin panel

LiveHelpNow!
Logout

VISITORS/CHATS

Filter

New ticket

TICKETS

View operators

Knowledge

SaaS/FAQ

KNOWLEDGE

Add to knowledge

Assign to: administrator

Department: Help Desk

Category: General edit

Reopen

Add to knowledge

Assign to: administrator

Department: Help Desk

Category: General edit

New ticket

Ticket ID: 12049

Status: Closed

Priority: High edit

Date Created: Dec 16 2010 9:17 AM EST

Created by: 495598be-23e8-479a-b775-13-1-3037762

Account #:

Additional Document: Screenshot

Subject:

the live row help tab

Question/Issue:

I just signed up for the paid service. I like to have the icon between 666-666-666 and expand or do you recommend installing it on the right hand side of the page where there is no text?

Knowledge base intelligent growth. With this feature you are able to add articles right into your knowledge base by clicking on a "add to KB" link in your chat session and your tickets.

Assigned to: administrator

Department: Help Desk

Category: General edit

Assigned to you: 0

Open tickets: 19

Open and unassigned: 9

Open and assigned: 10

Assign: Yes anyway you want.

Visitor: Is there a contact or is it month to month? #addtoadminsystem

Brian: no contract.

Visitor: sources like the solution to go with. #addtoadminsystem

Visitor: Thanks. I need to draft a proposal and get approval, thanks for the help. (I'll email, will it send me a transcript?) #addtoadminsystem

Brian: Okay, we will. Have a great day.

Visitor: you to. #addtoadminsystem

Chat session has been terminated.

Send

General

Notes: #addtoadminsystem

Customer: livehelpnow.com

Visitor tag: #addtoadminsystem

Current Page: #addtoadminsystem

Page Title: LiveHelpNow

Referrer: Direct Hit

Country: United States

Region: California

City: Los Angeles

Postal Code: 90001

Area Code: 323

Language: en-us

ISP: Proxad, Name

Host Name: cpe-75-84-190-8.socal.res.llnwd.net

IP Address: 75.84.190.9

Browser: #addtoadminsystem

Ticket ID	From	Status	Subject	Body	Priority	Category	Assigned	Ack'd	Date Created
12049	Joe@tratt.com	Working	Feature request	Hi, I have an article -- add it, please. If your programmers are sitting around with nothing to do, displaying Dear Michael, Please let me. If it is possible, that you or the staff with Edward Pleasman about customizing the knowledgebase web page.	High	General	administrator	Yes	08/15/2010
9179	Joe@tratt.com	Working	chat survey results		High	General	administrator	Yes	08/05/2010
1661	Marin (marin@emella.com)	Working	Thanks Integration		Medium	Support	administrator	Yes	03/04/2010
15796	Michael (michael@madaddress.com)	Waiting for response	Outsource Knowledgebase Web page		High	Support	administrator	No	11/24/2010
88308	Robert	Waiting for	Change Support System	Can you create an Change Support System	Low	General	administrator	Yes	11/29/2011

View 1-31 of 230

Nav History

Call History

Assigns to you: 0

Open tickets: 19

Open and unassigned: 9

Open and assigned: 10

Assign: Yes anyway you want.

Visitor: Is there a contact or is it month to month? #addtoadminsystem

Brian: no contract.

Visitor: sources like the solution to go with. #addtoadminsystem

Visitor: Thanks. I need to draft a proposal and get approval, thanks for the help. (I'll email, will it send me a transcript?) #addtoadminsystem

Brian: Okay, we will. Have a great day.

Visitor: you to. #addtoadminsystem

Chat session has been terminated.

Send

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10:18 AM

FIG. 4f

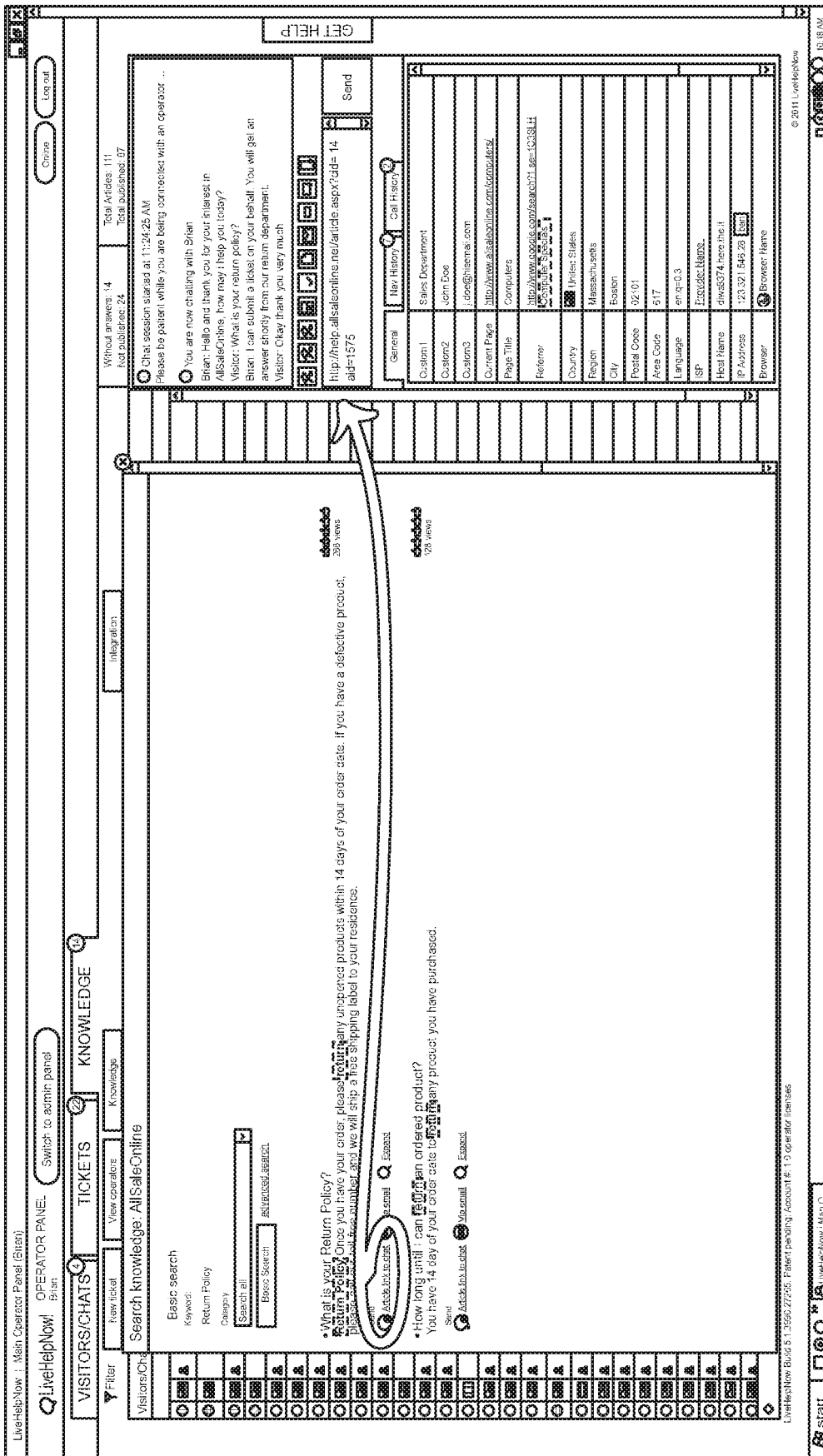


FIG. 4g

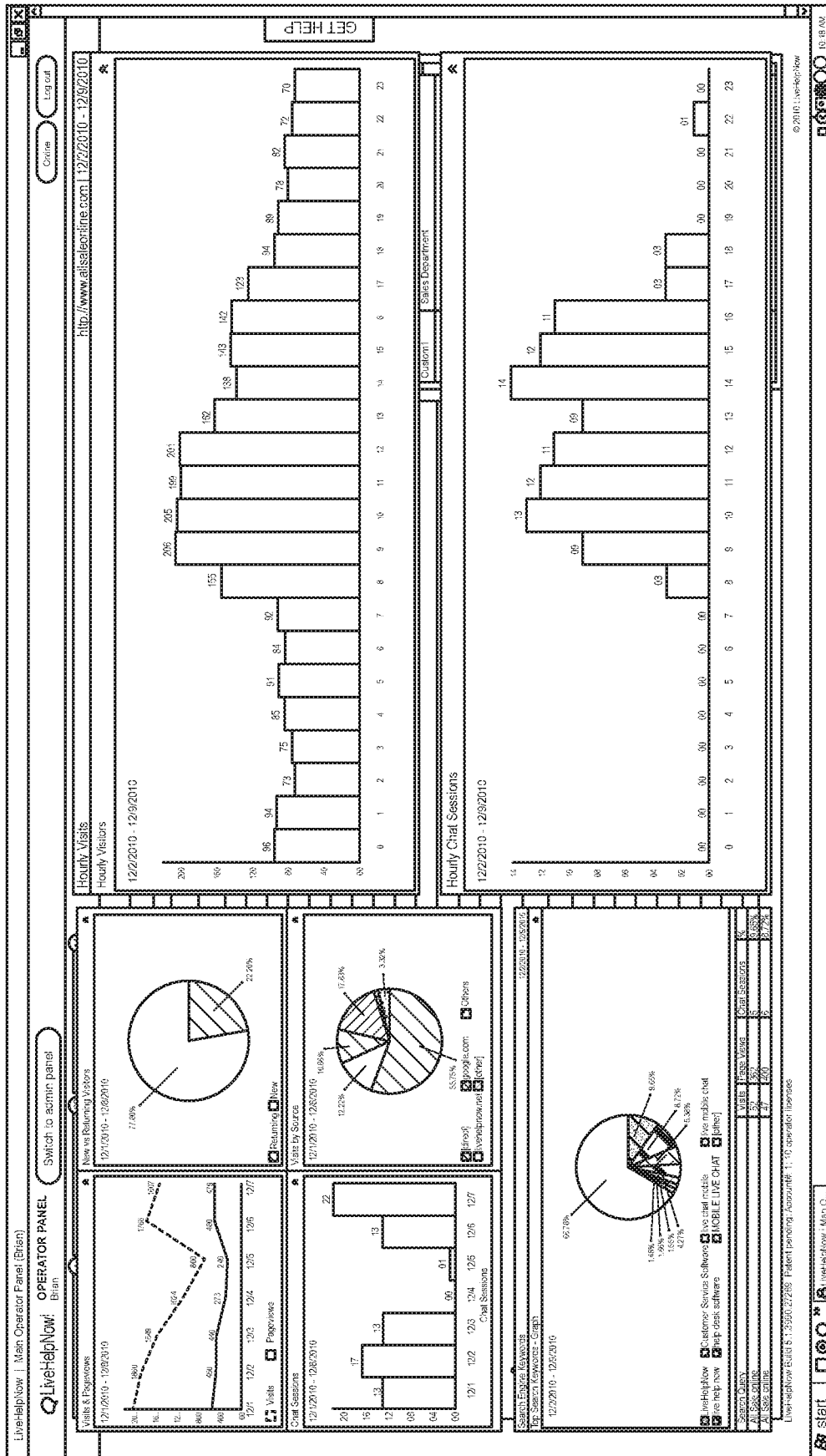


FIG. 4h

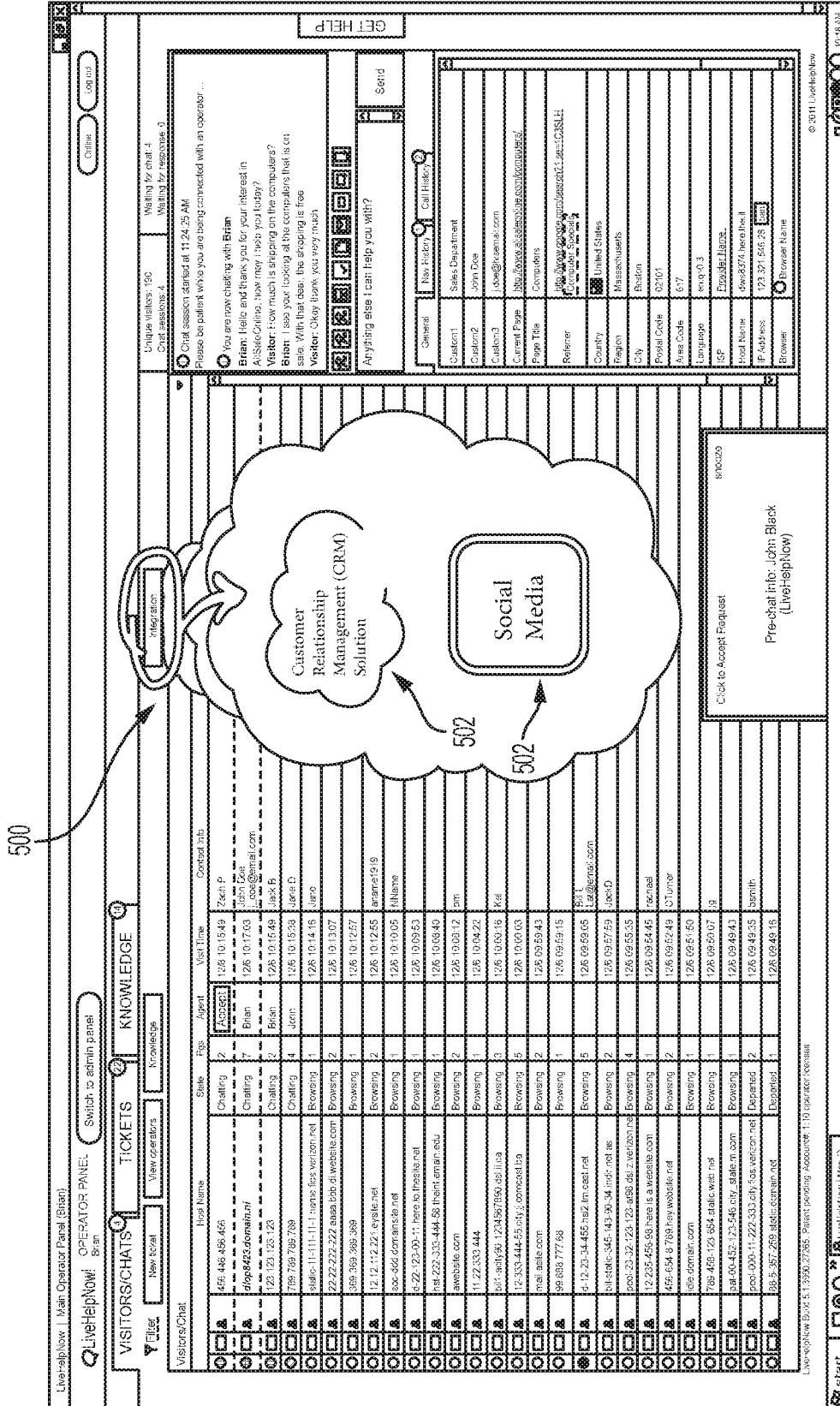


FIG. 5

HelpNow! OPERATOR PANEL: Switch to admin panel | Ben

VISITORS/CHATS | TICKETS | CALLBACKS | KNOWLEDGE

11:30:36
11:30:52 Ben: Hello and thank you for your interest in LiveHelpNow, please allow me a moment to review your question.
11:30:59 Ben: Bonjour, et merci de m'etre 'interessé par LiveHelpNow, s'il vous plait laissez-moi un moment pour revoir votre question.
11:31:45
11:38:37 You: Question
11:38:38 Ben: Answer
11:38:37 Chat session has been terminated
14:13:54 Chat session started at 2:13:41 PM
14:14:10 Please be patient while you are being connected with an operator...
14:14:28 Ben: Hello and thank you for your interest in LiveHelpNow, please allow me a moment to review your question.
14:17:18

14:18:11 Ben: The request sent
14:18:44 The request declined
14:20:52 Ben: <http://www.livehelpnow.com/faq/faq-how-to-use-livehelpnow.aspx?cat=1&subcat=1&articleid=1&articleurl=faq-how-to-use-livehelpnow.aspx>
14:23:43
14:23:51 Ben: Hello and thank you for your interest in LiveHelpNow, please allow me a moment to review your question.
14:23:51 Ben: Hello ? LiveHelpNow
14:24:49
14:28:43 You: Question
14:28:48 Ben: Answer
14:30:03 You: Question
14:33:32 Ben: Answer
15:09:22 Ben: <http://help.livehelpnow.com/faq/faq-how-to-use-livehelpnow.aspx?cat=1&subcat=1&articleid=1&articleurl=faq-how-to-use-livehelpnow.aspx>
15:29:57 Chat session has been terminated

608 Call History (Chat transcript opened)

604 Call History box with Click to view link

602

Without answers: 77
Total published: 36
Total articles: 188
Total published: 150

Ben: <http://help.livehelpnow.com/faq/faq-how-to-use-livehelpnow.aspx?cat=1&subcat=1&articleid=1&articleurl=faq-how-to-use-livehelpnow.aspx>
Chat session has been terminated
Chat session started at 4:12:31 PM
Please be patient while you are being connected with an operator...
You are now chatting with Ben
Ben: Hello and thank you for your interest in LiveHelpNow, please allow me a moment to review your question.
You: What are your prices? [Send money](#)
Ben: <http://help.livehelpnow.com/faq/faq-how-to-use-livehelpnow.aspx?cat=1&subcat=1&articleid=1&articleurl=faq-how-to-use-livehelpnow.aspx>
You: [Send money](#)

606

GET HELP DASHBOARD

Chats - 11	General	Next History	Call History
13 Dec 2011 14:20:49	605Z IN VIEW	605Z IN VIEW	605Z IN VIEW
13 Dec 2011 15:21:11	605Z IN VIEW	605Z IN VIEW	605Z IN VIEW
06 Dec 2011 11:16:13	605Z IN VIEW	605Z IN VIEW	605Z IN VIEW
05 Dec 2011 14:37:22	605Z IN VIEW	605Z IN VIEW	605Z IN VIEW
02 Dec 2011 12:08:19	605Z IN VIEW	605Z IN VIEW	605Z IN VIEW
28 Nov 2011 11:12:36	605Z IN VIEW	605Z IN VIEW	605Z IN VIEW
28 Nov 2011 11:02:53	605Z IN VIEW	605Z IN VIEW	605Z IN VIEW
23 Nov 2011 15:15:15	605Z IN VIEW	605Z IN VIEW	605Z IN VIEW
16 Nov 2011 13:11:45	605Z IN VIEW	605Z IN VIEW	605Z IN VIEW
07 Nov 2011 09:40:21	605Z IN VIEW	605Z IN VIEW	605Z IN VIEW
05 Nov 2011 07:49:07	605Z IN VIEW	605Z IN VIEW	605Z IN VIEW
Tickets - 4			
09 Dec 2011 12:16:44	#269782	605Z IN VIEW	605Z IN VIEW
01 Dec 2011 17:19:49	#249889	605Z IN VIEW	605Z IN VIEW
18 Nov 2011 13:26:25	#238401	605Z IN VIEW	605Z IN VIEW
26 Oct 2011 14:12:58	#203106	605Z IN VIEW	605Z IN VIEW

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FIG. 6

700

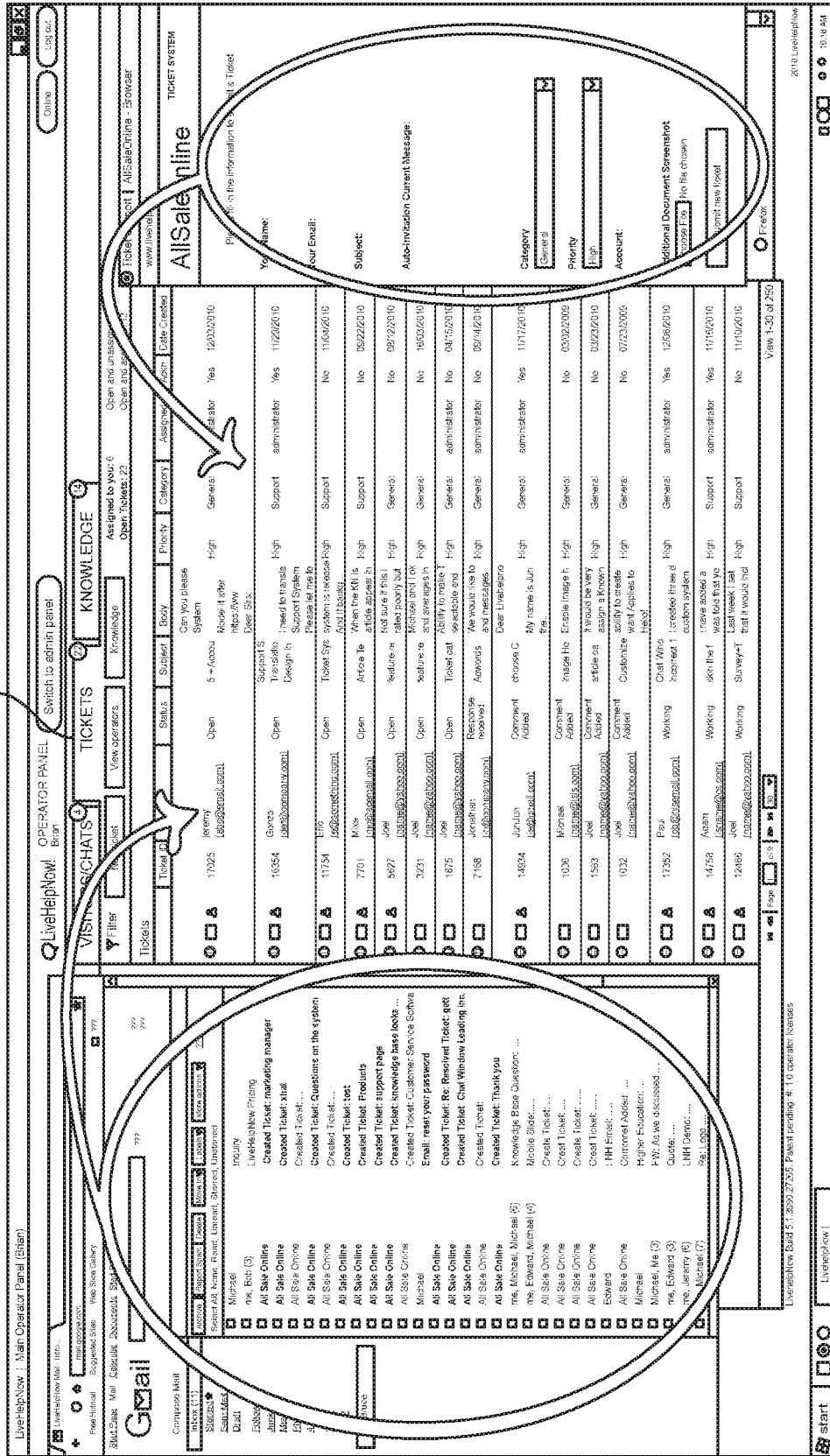


FIG. 7a

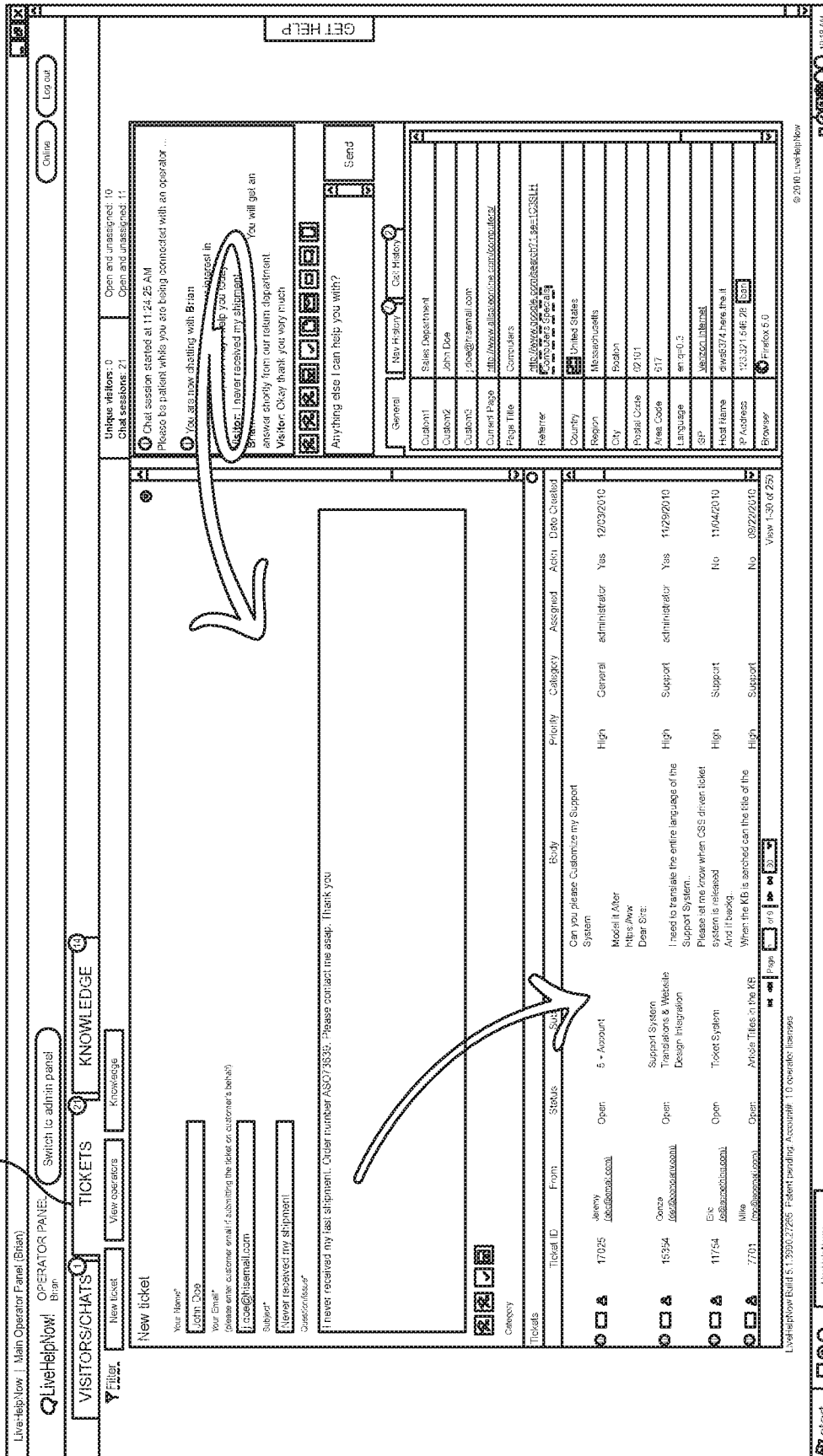


FIG. 7b

800

OPERATOR PANEL Switch to admin panel

LOG OUT

VISITORS/CHATS new list

TICKETS View operators

CALLBACKS Knowledge setup

INTEGRATIONS

KNOWLEDGE

197

Without answers: 16
Not published: 37
Total published: 150

Chat Tagging (Open)

Article ID	Title	Order	Public	Rating	Views	Edited	Category
1195	What are your prices?	0	No	★★★★★	0	12/14/2011	Surveys
4916	LiveHelpNow pricing	1	Yes	★★★★★	3285	12/14/2011	Billing / Pricing
1527	Installation on WordPress	1	Yes	★★★★★	2120	12/14/2011	Installation
12125	LiveHelpNow proprietary Whitizer/Technology	2	Yes	★★★★★	94	12/09/2011	Live Chat System, Usage
12210	Chat Session Timeout	0	Yes	★★★★★	20	12/09/2011	Live Chat System, Chat windows
13043	Chat Buttons	0	Yes	★★★★★	18	12/09/2011	General Questions
13642	Forgot Password	0	Yes	★★★★★	10	12/09/2011	General Questions
14625	Hiding chat button when all operators are offline	0	Yes	★★★★★	197	12/02/2011	Live Chat System, Features
12954	LiveHelpNow Brochure	0	Yes	★★★★★	16	12/02/2011	Chat Buttons
11426	Perform an action in a custom code before chat launch	0	Yes	★★★★★	174	12/01/2011	Advanced
12825	How to become a LiveHelpNow Reseller	0	Yes	★★★★★	13	12/01/2011	General Questions
3374	Dynamic chat invitation	40	Yes	★★★★★	584	11/30/2011	Live Chat System
3261	Trigger chat invitation	11	Yes	★★★★★	406	11/30/2011	Live Chat System
1715	Invitation to chat and base objects	1	Yes	★★★★★	776	11/30/2011	Installation
4952	Loading the code with auto invitation on/off	24	Yes	★★★★★	447	11/30/2011	Live Chat System
1739	Customer invitation to chat	4	Yes	★★★★★	1298	11/30/2011	Live Chat System
2874	How to enable/disable automatic chat invitation	2	Yes	★★★★★	447	11/30/2011	Live Chat System
1712	Live Chat Auto Invitation	1	Yes	★★★★★	883	11/29/2011	Live Chat System
12788	Post chat survey	0	Yes	★★★★★	13	11/29/2011	Surveys
18586	Account Message Slides	0	Yes	★★★★★	244	11/18/2011	General Questions, Live Chat System, Ticket System, Support system, Callouts, Request
11961	Wire information	0	No	★★★★★	5	11/09/2011	General Questions
12379	Time stamps	0	Yes	★★★★★	66	10/14/2011	Live Chat System
1543	What are the Software Requirements for running the	0	Yes	★★★★★	831	11/04/2011	Installation
12260	Chat Tagging explained	0	Yes	★★★★★	71	11/03/2011	Live Chat System, Features, Usage
3118	Forcing LiveHelpNow chat button to load last	29	Yes	★★★★★	476	11/03/2011	Live Chat System, Chat Buttons
12110	test	0	No	★★★★★	2	10/26/2011	Free Trial
12150	LiveHelpNow Live Chat code breakdown (for sales)	0	Yes	★★★★★	195	10/25/2011	Customization, Advanced
12117	LiveHelpNow Agile Software Download	0	Yes	★★★★★	131	10/25/2011	Agent, New, user, registration

View 1-30 of 188

SQL Server Management Studio

GET HELP DASHBOARD

General: Home History Call History

Name: Brian Smith

Full Name: Brian Smith

Email: bsmith@livehelpnow.com

Thinking about: General Info

Question: Do Not Accept

Custom?: None

Make Tags: RRRRR

Current Page: http://www.livehelpnow.com/

Page Title: Customer Services Software | Help Desk Software | LiveHelpNow

Subpage: http://www.livehelpnow.com/helpdesk/identification.html

Country: United States

Region: Pennsylvania

City: Willow Grove

Postal Code: 19099

Area Code: 215

Language: en-US

ASP: Franklin Dimes

Without answers: 16
Not published: 37
Total published: 150

Chat session has been terminated
Please do not chat with Brian
You are now chatting with Brian
Brian: Hello and thank you for your interest in LiveHelpNow, please email me if you have any questions.
Your email has been added to our contact list.
Brian: Hello, I have a question about your software.
Brian: I have a question about your software.

Log In/Out
Sales Inquiry
Billing Issue
Demo
Up-sell / Cross-sell
Learning Center
General Question
Technical Question
Technical Issue
Billing Question
Clear All Categories

FIG. 8a

802

HelpNow! OPERATOR PANEL [Switch to admin panel](#)

View operators Knowledge about Integrations

CALLBACKS

TICKETS

KNOWLEDGE

Online [Log out](#)

Take articles: 188
Total published: 150

Chat logging (closed with icon(s))

What are your prices? 12/14/2011 0 0
 Live chat system 12/14/2011 326 0
 Installation on WordPress 12/14/2011 2120 0
 Live chat system, Usage 12/09/2011 94 0
 Live chat system, Chat windows 12/09/2011 30 0
 General questions 12/09/2011 18 0
 General questions 12/09/2011 10 0
 Chat buttons 12/09/2011 467 0
 Live chat system, Features 12/09/2011 18 0
 General questions 12/09/2011 171 0
 General questions 12/09/2011 13 0
 Live chat system 11/09/2011 40 0
 Live chat system 11/09/2011 406 0
 Installation 11/09/2011 770 0
 Live chat system 11/09/2011 447 0
 Live chat system 11/09/2011 260 0
 Live chat system 11/09/2011 447 0
 Live chat system 11/09/2011 983 0
 Surveys 11/09/2011 13 0
 General questions, Live chat system, Support system, Callback Request 11/09/2011 244 0
 General questions 11/09/2011 5 0
 Live chat system 11/09/2011 66 0
 Installation 11/09/2011 821 0
 Live chat system, Features, Usage 11/09/2011 476 0
 Live chat system, Chat buttons 10/08/2011 2 0
 Free Trial 10/08/2011 68 0
 Customization, Advanced 10/08/2011 131 0
 Admin, New visitor notification 10/08/2011 131 0

Chat Session

Chat session has been terminated
 Chat session started at 4:12:31 PM
 Please do not chat while you are being connected with an operator.
 You are now chatting with Brian
 Brian: Hello and thank you for your interest in Livehelpnow, please allow me a moment to review your question.
 You: What are your prices?
 Brian: Hello, we have a special offer for you. Please contact us at 1-800-441-4918.
 Brian: What are your prices?
 Brian: Hello, we have a special offer for you. Please contact us at 1-800-441-4918.

Send

General

Full Name: Brian Smith
 Email: bsmith@livehelpnow.com
 Phone: 555-555-5555
 Country: United States
 Region: Pennsylvania
 City: Harrisburg
 Postal Code: 17101
 Area Code: 717
 Language: en-US
 ISP: Comcast

Navigation

Home | About Us | Contact Us | Privacy Policy | Terms of Service | Helpdesk | Feedback

FIG. 8b

Livehelpnow.com 5.1.0.52/2014; Admin: Admin; Admin: # 1; 10 person licenses

HelpNow! OPERATOR PANEL Switch to admin panel

VISITORS/CHATS View operators Knowledge Search CALLBACKS KNOWLEDGE

Tickets

Ticket ID	From	Status	Subject	Body	Priority	Category	Assigned	Acks	Date Created
268947	Brian	Open	Pricing	What is your current pricing?...	High	General	bruce	Yes	12/14/2014
268932	eml	Open	Reports for brand LTR	Forwarded message from LTR...	High	Support	bruce	No	12/12/2011
268434	eml	Open	Social Media Analytics	Hi, I've already looked at this knowledge base and it doesn't seem to have what I need...	High	Support	bruce	No	12/12/2011
268908	eml	Open	Project Management (Maximized)	We would very much like to have the ability to include calltags in the CRM...	High	Support	bruce	No	12/12/2011
268908	eml	Open	Project Management (Maximized)	Entertainment Set View Access' settings for a user being use G...	Medium	Support	bruce	No	12/12/2011
268908	eml	Open	Project Management (Maximized)	Hi, I would like to make a request for a custom report - mostly an error...	High	Support	bruce	No	12/12/2011
268908	eml	Open	Project Management (Maximized)	Hi, We have an issue with the printer to make the system send a print...	Medium	Support	bruce	No	12/12/2011
268908	eml	Open	Project Management (Maximized)	Hi, Do you have any update on when set up for the printer will be resolved...	High	Support	bruce	No	12/12/2011
268908	eml	Open	Project Management (Maximized)	Last week I had the email ticket system so that I could include links L...	High	Support	bruce	No	12/14/2014
268908	eml	Open	Project Management (Maximized)	We have dropped a Javascript tag (script src="http://...")...	High	Support	bruce	No	12/14/2014
268908	eml	Open	Project Management (Maximized)	PRO Assignment Review: Please contact the custom...	Medium	Support	bruce	No	12/14/2014
268908	eml	Open	Project Management (Maximized)	Please have sales contact me regarding your application...	Medium	Support	bruce	No	12/14/2014
268908	eml	Open	Project Management (Maximized)	Dear Sir, I am very interested to see the features of your software...	High	Support	bruce	No	12/14/2014
268908	eml	Open	Project Management (Maximized)	I would like to know about the two launchers or website plus w...	High	Support	bruce	No	12/14/2014
268908	eml	Open	Project Management (Maximized)	Dear Sir, my system subject Portuguese speak back to customer contacts...	High	Support	bruce	No	12/14/2014
268908	eml	Open	Project Management (Maximized)	Hi, the list of Help Provider there is an operator in UK...	Medium	Support	bruce	No	12/14/2014
268908	eml	Open	Project Management (Maximized)	Ref to ticket ticket 268394, forwarded your instructions and action...	High	Support	bruce	No	12/14/2014
268908	eml	Open	Project Management (Maximized)	Hi, everytime I login to the CRM, just in few secs it goes offline...	High	Support	bruce	No	12/14/2014

View 1-30 of 250

HelpNow! OPERATOR PANEL Switch to admin panel

VISITORS/CHATS View operators Knowledge Search CALLBACKS KNOWLEDGE

Tickets

Assigned to you: 1
Open and assigned: 2
Open tickets: 10

Whenever modal session is not assigned to you, click for more info.

Operator via e-mail. Is there something which would notify us that there was an attempt to a chat? View operators

Ben: Yes, there is a report in Admin panel -> Analytics called 'dropped chat session'.

You, ok, but we need to run this report to see those, it would not notify you, is that correct? View operators

Ben: Yes, that's correct.

Ben: It would be best to sign out whenever chat is going to be left unattended, otherwise customers will be self handling and it could potentially damage your company's reputation.

General

Full Name: Mark F

Email: m.f@ambushment.com

Trailing About: Technical Info

Question: Where can we get the chat ringing line and if no one is taking the call to get a text form to fill out

Custom 1: helen@row.com

Visitor tag: *****

Current Page: chat/help/faq/faq.html

Page Title: Chat Session Timeout

Referer: Chat Session Timeout

Country: Canada

Region: British Columbia

City: Vancouver

Area Code: since US

Language: English

IP: 192.168.1.1

© 2011 Vertiphone

FIG. 9

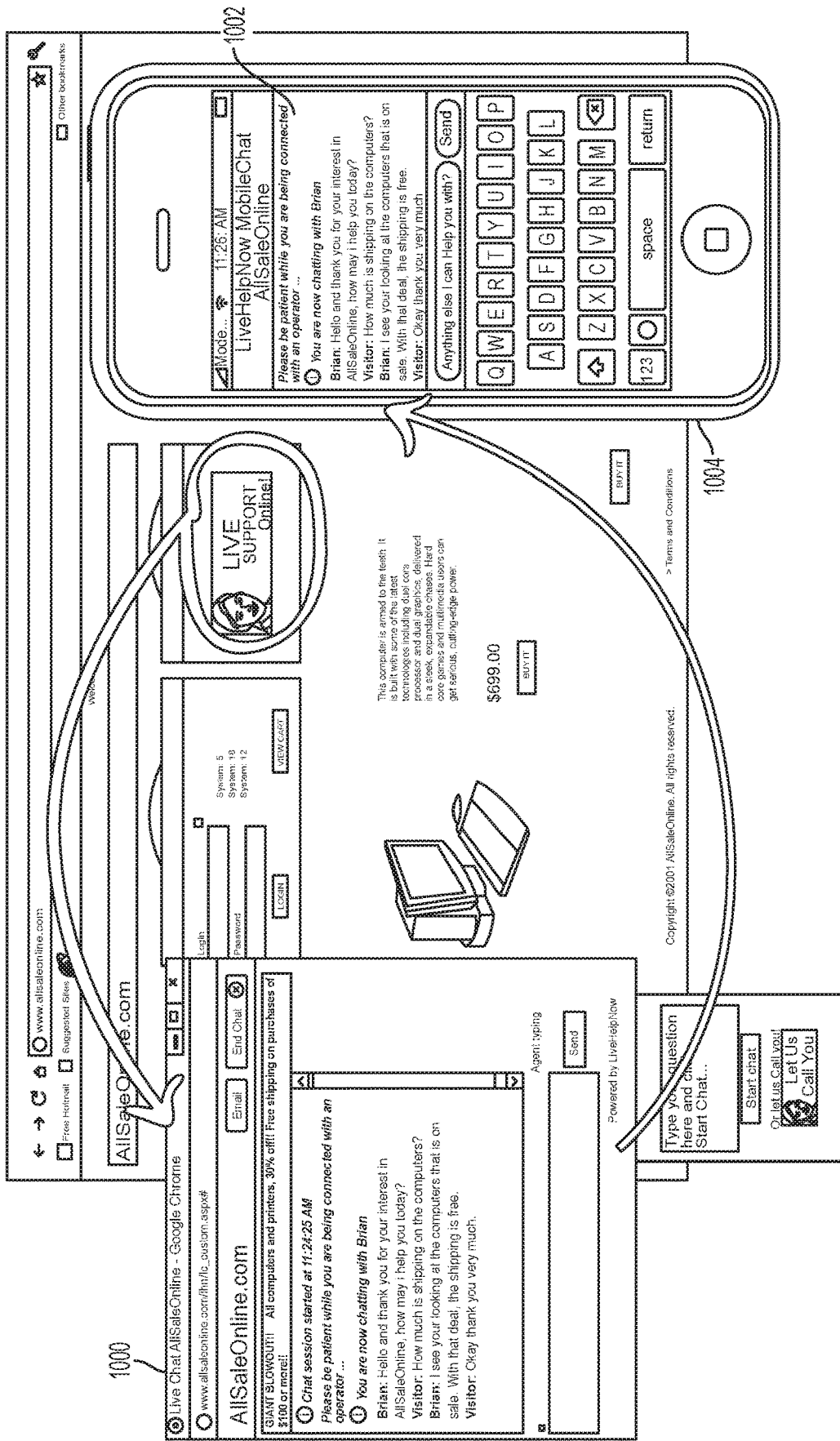


FIG. 10

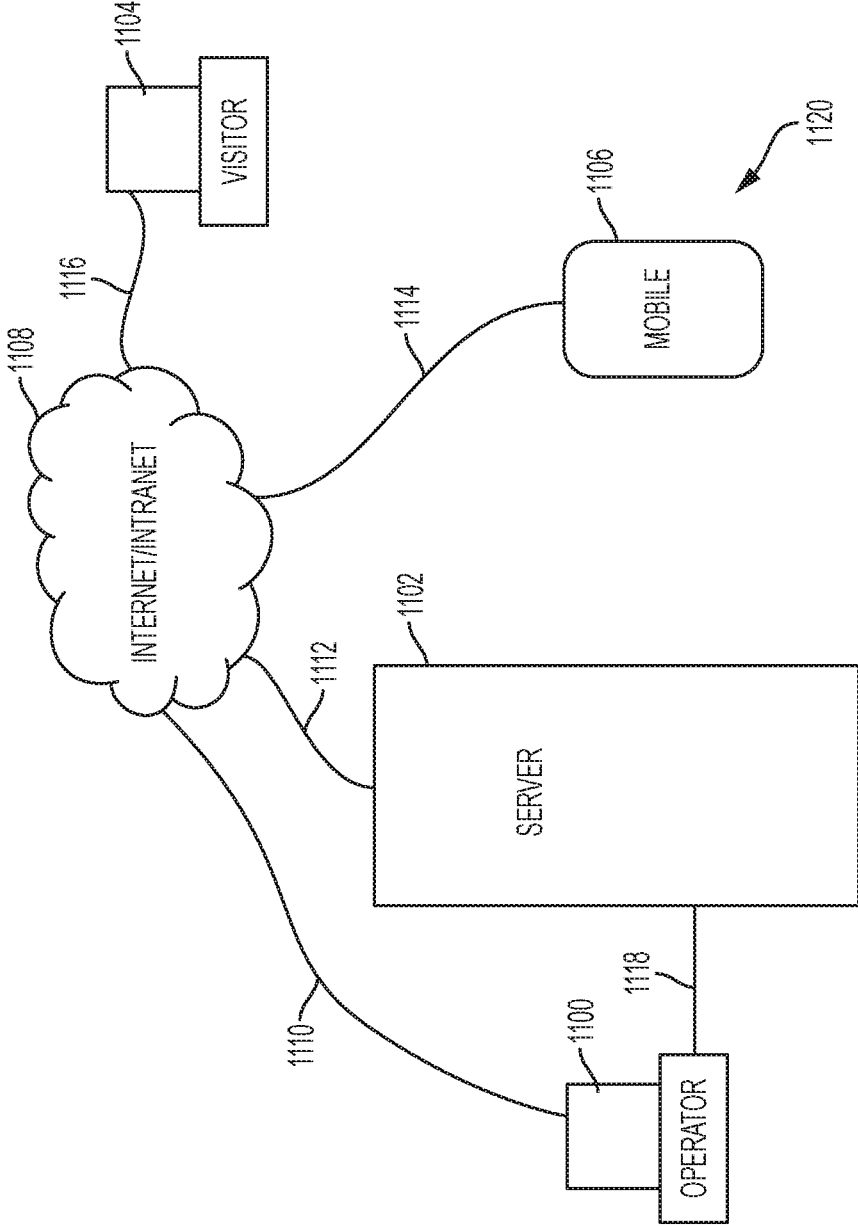


FIG. 11

**METHOD, SYSTEM AND APPARATUS FOR
ESTABLISHING AND MONITORING
SESSIONS WITH CLIENTS OVER A
COMMUNICATION NETWORK**

**CROSS-REFERENCE TO RELATED
APPLICATION**

[0001] This application is a continuation application of U.S. patent application Ser. No. 15/420,893, filed Jan. 31, 2017, which is a continuation application of U.S. patent application Ser. No. 14/880,353, filed Oct. 12, 2015 and issued as U.S. Pat. No. 9,584,375 on Feb. 28, 2017, which is a continuation application of U.S. patent application Ser. No. 13/328,691, filed Dec. 16, 2011 and issued as U.S. Pat. No. 9,178,950 on Nov. 3, 2015, which claims benefit under 35 U.S.C. § 119(e) of U.S. provisional patent application Ser. No. 61/424,486 filed Dec. 17, 2010, the disclosure of which (including all of the attachments filed therewith on Dec. 17, 2010) is hereby incorporated by reference in its entirety.

BACKGROUND OF THE INVENTION

1. Field of the Invention

[0002] The invention is generally in the field of web-based computing and communication, and provides systems and methods for real-time communication between website operators and visitors to a website including monitoring, gathering, managing and sharing of information.

2. Discussion of the Background of the Invention

[0003] Providing requested information to users via the Internet is well known. In many instances, the information is provided in response to a user's request for information, such as requests for information from customers entering a retailer's website and seeking information about a product advertised on the retailer's website. Conventionally, a response to such a request is not communicated back to the customer in real-time but via, for example a reply email sent much later, with the only alternative for receiving real-time communication or support is calling the retailer directly.

[0004] Accordingly, one of the drawbacks of conventional web-based customer support is the delay in response. In addition, conventionally, visitors to a retailer's web-site are not engaged in a live real-time interaction with the retailer as would be the case in a brick-and-mortar store, which may decrease the retailer's chances for promoting and selling its products or services. Exemplary, non-limiting embodiments of the present invention address at least the forgoing drawback of conventional web-based systems.

SUMMARY OF THE INVENTION

[0005] Exemplary embodiments of the present invention address at least the above drawbacks and/or disadvantages and provide at least the advantages described below.

[0006] An exemplary embodiment of the present invention provides system and method allowing an operator to simultaneously chat with a visitor to the operator's website while responding/submitting tickets/emails and searching through the company knowledge base articles for information.

[0007] Another exemplary embodiment of the present invention provides system and method allowing implemen-

tation of a whisper technology, or ability for operator to communicate a message to another operator directly in the active chat session, this message will remain hidden to the visitors/customers.

[0008] Yet another exemplary embodiment of the present invention provides system and method for facilitating billboards, or an ability to display a series of scrolling advertising messages to visitors/customers within the chat window during active chat sessions.

[0009] Yet another exemplary embodiment of the present invention provides system and method for knowledge base intelligent growth which allows operators to add articles directly into the knowledge base module by clicking on a link in a chat session and within ticket entries.

[0010] Yet another exemplary embodiment of the present invention provides system and method for API Integration, which provides capability to pick up real-time information from a system's website visitor by seeing the content of a visitor's shopping cart or by passing information from the systems' server into the visitor's information located in the operator's panel.

[0011] Yet another exemplary embodiment of the present invention provides system and method that include multiple chat windows, which facilitates the ability to create and brand multiple chat windows and selectively link all or some them to the same account.

[0012] Yet another exemplary embodiment of the present invention provides system and method that include chat tagging, which facilitates the ability to tag each chat session and group thusly tagged chat sessions, for example, by any selected or assigned categories.

[0013] Yet another exemplary embodiment of the present invention provides system and method including parent-child ticketing for project management, which allows an unresolved ticket to be broken into subordinate tickets to facilitate management of complex tasks.

[0014] Yet another exemplary embodiment of the present invention provides system and method including lead scoring, which assigns a percentage score to each unique website visitor based on a combination of identifiable visitor data and specific visitor actions.

[0015] Yet another exemplary embodiment of the present invention provides system and method including mobile live chat between an operator/agent and a client/customer.

BRIEF DESCRIPTION OF THE DRAWINGS

[0016] A more complete appreciation of the present invention and many of the attendant advantages thereof will be readily obtained as the same becomes better understood by reference to the following detailed description when considered in connection with the accompanying drawings, wherein:

[0017] FIGS. 1a-1g are illustrative examples of graphical user interfaces and underlying computer-implemented functional modules facilitating multitasking according to exemplary embodiments of a system and methodology of the present invention.

[0018] FIGS. 2a-2c are illustrative examples of graphical user interfaces and underlying computer-implemented functional modules facilitating a whisper feature according to exemplary embodiments of a system and methodology of the present invention.

[0019] FIG. 3 is an illustrative example of a graphical user interface and underlying computer-implemented functional

modules facilitating a billboard feature according to exemplary embodiments of a system and methodology of the present invention.

[0020] FIGS. 4a-4h are illustrative examples of graphical user interfaces and underlying computer-implemented functional modules facilitating knowledge base features according to exemplary embodiments of a system and methodology of the present invention.

[0021] FIG. 5 is an illustrative example of a graphical user interface and underlying computer-implemented functional modules facilitating a third-party system integration feature according to exemplary embodiments of a system and methodology of the present invention.

[0022] FIG. 6 is an illustrative example of a graphical user interface and underlying computer-implemented functional modules facilitating a call history feature according to exemplary embodiments of a system and methodology of the present invention.

[0023] FIGS. 7a and 7b are illustrative examples of a graphical user interface and underlying computer-implemented functional modules facilitating management of input received from website visitors according to exemplary embodiments of a system and methodology of the present invention.

[0024] FIGS. 8a and 8b are illustrative examples of a graphical user interface and underlying computer-implemented functional modules facilitating a chat tagging feature according to exemplary embodiments of a system and methodology of the present invention.

[0025] FIG. 9 is an illustrative example of a graphical user interface and underlying computer-implemented functional modules facilitating task assignment and management features according to exemplary embodiments of a system and methodology of the present invention.

[0026] FIG. 10 is an illustrative example of a graphical user interface and underlying computer-implemented functional modules facilitating a mobile connectivity feature according to exemplary embodiments of a system and methodology of the present invention.

[0027] FIG. 11 is an illustrative block diagram of a system and system components implementing functional modules facilitating features and services provided according to exemplary embodiments of systems and methodologies of the present invention illustrated in the non-limiting examples of FIGS. 1a-10.

DETAILED DESCRIPTION OF EXEMPLARY EMBODIMENTS

[0028] Exemplary embodiments of the present invention are described below with reference to the drawing figures showing illustrative examples of structure and functionality through screen captures of a user interface at different stages or modes of operation. Such exemplary implementations are not intended to limit the scope of the present invention, which is defined in the appended claims.

[0029] Thus, the matters defined in the following description, such as a detailed construction as well as certain terminology and elements, are provided to assist in a comprehensive understanding of the invention not to limit the scope thereof. Accordingly, those of ordinary skill in the art will recognize that various changes and modifications of the embodiments described herein can be made without depart-

ing from the scope and spirit of the invention. Also, well-known functions or constructions are omitted for clarity and conciseness.

[0030] Exemplary embodiments of the present invention provide methods, systems and apparatuses for monitoring and conducting real-time communication over a communication network using computer implemented web-based interactive sessions with visitors to a website through features (which are described in more detail below) such as live chat, email-ticket queue support, and self-service (internal and external) knowledge base.

[0031] According to exemplary implementations of the present invention real-time interactive communication and support incorporate a computerized live chat system according to embodiments of the present invention installed with any website or Internet/Intranet application, providing at least the benefit of answering client/customer inquiries via a live chat session on a computer (for example, PC, Mac, or mobile communication device). Further, exemplary implementations for the present invention provide for incorporating billboard advertising along with a live chat session with a visitor to a website where a visitor can be a client/customer of the website's owner, agent or operator.

[0032] Thus, exemplary embodiments and/or implementations of the present invention relate to novel techniques that organizations can use for their website operators/agents to provide support to clients/customers via a computerized real-time interactive sessions such as live chat, and others in accordance with exemplary embodiments of the present invention as follows.

[0033] An exemplary embodiment of the present inventions provides system and method allowing an operator to simultaneously chat with a visitor to the operator's website while responding/submitted tickets/emails and searching through the company knowledge base articles for information.

[0034] Referring to FIG. 1, an example of a graphical user interface according to an embodiment of the present invention provides a main operator panel 100 exemplifying multitasking. An operator can monitor activity of visitors and/or chats in real time. For example, the panel provides for chatting 108 with multiple clients/customers 102 concurrently, with, for example, tickets 104, emails and search or update, and/or updating the company knowledge base 106 simultaneously. The live chat enables file transmission, chat transfer and remote assistance with greater ease than traditional systems. The operator panel features a public API which allows for full integration with third-party systems.

[0035] According to an exemplary implementation, the ability to chat with visitors/customers is provided to operators simultaneously as they use any or every software module including the ticket, callback, and knowledge base modules.

[0036] For example, as an operator replies to a ticket using the ticket module, the chat window remains on-screen so that an ongoing chat session can be maintained while answering tickets. Tickets can also be created on the fly as an operator chats with a visitor/customer using the "New ticket" button. Within the "New ticket" window there is a link provided that allows operators to transfer the contents of the current live chat session into the body of the ticket with one click. The chat window remains in the same location across the operator panel in all modules, allowing the operator to multi-task.

[0037] According to another example, operators can manage multiple chat sessions within the visitors/chats module using color-coded status icons that indicate whether a visitor/customer is currently browsing (gray), waiting for chat (red), waiting for operator response (yellow), operator waiting for visitor response (green), or has previously chatted/has been invited to chat by an operator (blue). During active chat sessions the waiting for operator response (yellow) & operator waiting for visitor response (green) icons are utilized to focus an operator's attention on visitors/customers who are waiting for the operator's response, allowing the operator to switch between chats efficiently and multitask.

[0038] According to yet another example, knowledge base articles are created using a built-in rich text editor and content management system. Articles may include text, hyperlinks, images, and video content and are published in a question and answer format. Knowledge base articles can be organized by category, can be searched by operators, and can be published online for visitors/customers to browse or stored as private articles for operators to use internally. All knowledge base articles can be searched in real time by operators using a "knowledge lookup" button accessible from any module in the operator panel. The knowledge base articles presented to operators in the "knowledge lookup" window after a running a search can quickly be linked to visitors/customers engaged in a chat session using the "Article link to chat" link located below each article excerpt. This allows operators to give visitors/customers quick access to expert knowledge so they can handle multiple difficult inquiries at the same time.

[0039] According to yet another example, operators also have the ability to search the knowledge base directly within active chat sessions and tickets. Every message a visitor/customer sends to an operator in a chat session can be looked up in the knowledge base using a "search knowledge" link that is appended to visitor/customer responses. This "search knowledge" link is also available to operators as they respond to visitor/customer tickets. This functionality serves to speed up the support process, allowing operators to quickly enter a query into the knowledge base without typing out any text.

[0040] Referring to FIGS. 1b-1g, according to an exemplary implementation of the present invention, the following features are provided as part of a user interface:

- [0041]** 1. Operator Panel—location of chat window (visitors/chats tab).
- [0042]** 2. Location of the chat window (tickets tab).
- [0043]** 3. "New ticket" button location.
- [0044]** a. "Get from chat" link.
- [0045]** 4. Location of the chat window (knowledge tab).
- [0046]** 5. Knowledge base text/content editor.
- [0047]** 6. "Knowledge lookup" button location.
- [0048]** 7. Knowledge lookup window.
- [0049]** a. "Article link to chat" link.
- [0050]** b. Article link inserted into the chat window.
- [0051]** 8. Show the "search knowledge" link in the chat window and the ticket window.

[0052] Another exemplary embodiment of the present inventions provides system and method allowing implementation of a whisper technology, or ability for operator to communicate (or, "whisper") a message to another operator directly in the active chat session, this message will remain hidden to the visitors/customers. Whisper technology is a coaching tool which may be used to train newly hired

operators more quickly than traditional methods would allow. It also provides the ability for expert operators to "chime in" on the chats of less experienced operators who, for example, may not have the skills required to answer complex visitor/customer inquiries in full detail.

[0053] Referring to FIG. 2a, an example of a graphical user interface providing an exemplary implementation of whisper technology module 200, according to an embodiment of the present invention, which allows a silent (without alerting website's visitor) connection of a coach 204 with operators/agents 202 in real time while the operator/agent is on a chat with a visitor (for example a client/customer) 206. A non-limiting advantage of the whisper feature is to facilitate training of an operator/agent during a live chat session with minimal interjection from the coach/trainer

[0054] According to an exemplary implementation, any operator can send a whisper to another operator by selecting a chat session that is not assigned to them and typing a message into the chat box then sending it. The operator receiving a whisper will see the text from the message included in-line with the messages normally sent between the operator and the visitor/customer in the chat box.

[0055] According to yet another exemplary implementation, whisper messages are highlighted to distinguish them from other messages, and a "respond" link is appended to every whisper so that the operator receiving whispers can easily reply to the operator sending whispers using an "internal chat window".

[0056] Referring to FIGS. 2b and 2c, according to an exemplary implementation of the present invention, the following features are provided as part of a user interface:

- [0057]** 1. Receiving a whisper (highlighted text and the respond link).
- [0058]** 2. Responding to a whisper (internal chat window).

[0059] Yet another exemplary embodiment of the present inventions provides system and method for facilitating billboards, or an ability to display a series of scrolling advertising messages to visitors/customers within the chat window during active chat sessions.

[0060] Referring to FIG. 3, an example of a graphical user interface provides a billboard advertising panel 300 for live chat between an operator/agent and a client/customer, according to an exemplary embodiment of the present invention. Further, exemplary implementations of the present invention provide for incorporating billboard advertising along with live chat with a client/customer. For example, a billboard live chat window advertising panel provides up to 10 rotating advertising messages to client/customers waiting for live chat session to be accepted or for the agent to respond, according to an exemplary implementation of the present invention.

[0061] In an exemplary implementation, billboard messages are text-based, but they may also include clickable hyperlinks. Clickable "Banner ads" with custom graphics may also be displayed in place of text-based Billboard messages.

[0062] As illustrated in FIG. 3, according to an exemplary implementation of the present invention, certain features provided as part of a user interface include billboard messages 300 in a chat window 302. These messages including, for example, a text based portion with a link, and implemented as a banner ad.

[0063] Yet another exemplary embodiment of the present inventions provides system and method for knowledge base intelligent growth which allows operators to add articles directly into the knowledge base module by clicking on a link in a chat session and within ticket entries. This visitor/customer-generated content grows the knowledge base and adds to its utility.

[0064] Referring to FIG. 4a, an example of a graphical user interface providing for knowledge base information **400** between an operator/agent and a client/customer, according to an exemplary embodiment of the present invention. Exemplary implementations of the present invention provide for decreasing a company's customer call volume by publishing searchable and brandable frequently asked questions (FAQ)/knowledge base. For example, customers can find answers without initiating a customer service inquiry by accessing knowledge base **402**. The knowledge base can grow directly from live chat sessions, tickets and/or information added manually according to exemplary implementations of the present invention

[0065] According to an exemplary implementation, knowledge base intelligent growth is available to operators using the chat and ticket modules. Clicking the "add to knowledge base" link creates a knowledge base article with the content from the chat session or ticket copied into it. The new knowledge base article can then be edited and published onto a website or stored for internal purposes using the built in content management system in the knowledge module.

[0066] According to another exemplary implementation, administrators have the ability to generate reports that compile data generated by the system which can allow for to the intelligent growth of the knowledge base. The system tracks every search term used in visitor/customer knowledge base queries along with the total number of times each search term has been entered. The number of results found for each search term query is also displayed. When there are no results returned by a search term, this output is highlighted in a "knowledge base search term report".

[0067] Referring to FIG. 4h, an example of a graphical user interface provides access to the reports related to live chat between an operator/agent and a client/customer, according to an exemplary embodiment of the present invention. For example, exemplary implementations of the present invention provide for real-time monitoring chat sessions/tickets in progress, and further provide for reporting from website traffic analysis to operator/agent productivity.

[0068] According to yet another exemplary implementation, the system also has the ability to automatically email reports to a specific administrator/operator containing the results from the "knowledge base search term report" so that the operator can intelligently maintain and expand their knowledge base to meet visitor/customer self-service needs more effectively over time.

[0069] Referring to FIGS. 4b-4e, according to an exemplary implementation of the present invention, certain features provided as part of a user interface include:

[0070] 1. "Add to Knowledge Base (KB) link" in chat.

[0071] 2. Newly added knowledge base article in the knowledge tab.

[0072] 3. The same KB article opened in the content management system.

[0073] Referring to FIG. 4f, another example of a graphical user interface providing for adding articles into a knowl-

edge base directly from a live chat session between an operator/agent and a client/customer, and/or from a ticket, according to an exemplary embodiment of the present invention, allows an operator to click on "Add to Knowledge" button to add a link from a chat session and/or a ticket.

[0074] Referring to FIG. 4g, an exemplary implementation of a graphical user interface provides for searching of a knowledge base while conducting live chat between an operator/agent and a client/customer, according to an exemplary embodiment of the present invention. For example, an operator can search the knowledge base associated with an exemplary system of the present invention, and provide that searched information to a client/customer while engaged in a live chat session.

[0075] Yet another exemplary embodiment of the present inventions provides system and method for API Integration, which provides capability to pick up real-time information from a system's website visitor by seeing the content of a visitor's shopping cart or by passing information from the systems' server into the visitor's information located in the operator's panel.

[0076] Referring to FIG. 5, an example of a graphical user interface providing for live chat between an operator/agent and a client/customer where the operator panel can integrate **500** with third party systems **502** via a public API (non-limiting examples of such third party systems include Salesforce and Facebook), according to an exemplary embodiment of the present invention.

[0077] Yet another exemplary embodiment of the present inventions provides system and method for generating and maintaining a history of past activity (or call history), where, for example, when selecting a visitor/customer in the visitor grid, viewing a ticket, or viewing a callback, the operator has the ability to see all previously submitted tickets, chat sessions and callbacks for the selected visitor/customer.

[0078] According to an exemplary implementation, when a visitor/customer entry in the visitor grid, ticket module, or callback module is selected by an operator the call history for that visitor/customer automatically becomes accessible using the "call history tab" located under the chat window.

[0079] According to another exemplary implementation, when an operator selects the call history tab, a history of every interaction on record with the currently selected visitor/customer is listed. This list can include, for example, chats, tickets and callbacks.

[0080] According to yet another exemplary implementation, entries in call history list the date and time of every past interaction with the current visitor/customer and links are provided to view the archived chats, tickets and callback entries associated with the call history entries.

[0081] According to yet another exemplary implementation, call history is generated by searching a customer database for the visitor/customer IP address, email address, host name, and cookies from previous sessions.

[0082] Referring to FIG. 6, according to an exemplary implementation of the present invention, certain features provided as part of a user interface in an exemplary implementation of a call history feature according to an embodiment of the present invention include:

[0083] 1. An operator panel **600**, with the call history tab **602** showing a number of chat and ticket records **604**. (In an illustrative, non-limiting example, the cursor should be resting over a "click to view" link **606**.)

[0084] 2. An opened call history entry, showing an archived transcript. (608)

[0085] Yet another exemplary embodiment of the present inventions provides system and method that include multiple chat windows, which facilitates the ability to create and brand multiple chat windows and selectively link all or some them to the same account. This allows one company/set of operators to service multiple web sites/brands or to present a different window to visitors/customers depending on the department selected.

[0086] Referring to FIGS. 7a and 7b, example of user interfaces provide for managing tickets 700, according to an exemplary embodiment of the present invention. For example, exemplary implementations of the present invention provide for assigning, queuing and prioritizing customer inquiries arriving via email or web page. Other exemplary implementations of the present invention provides for an email-ticket management system to facilitate organization of emails. Yet other exemplary implementations of the present invention provide for responding to a visitor's inquiry even if unable to do so while in a live chat by creating a follow-up ticket on behalf of the client/customer (visitor) for other agents/operators/departments to responds.

[0087] According to an exemplary implementation, each website can have its own unique branding and the chat window for each website can reflect this branding. Each company department can have its own priorities and the chat window that department utilizes can be customized to reflect those priorities.

[0088] According to another exemplary implementation, chat windows can be added and modified within the administrative portion of the operator panel. Each chat window can exist on its own and can be tied to any number of click-to-chat buttons, internal departments, and online domains.

[0089] Yet another exemplary embodiment of the present invention provides system and method that include chat tagging, which facilitates the ability to tag each chat session and group thusly tagged chat sessions, for example, by any selected or assigned categories.

[0090] According to an exemplary implementation, operators are given the option to tag each chat session as they chat with the visitor/customer. The chat tags can be used to, for example, group similar chats together for later review. For example, a company may utilize a "shipping issue" tag to track the effectiveness of their shipping department and log recurring problems so that they can be addressed more completely.

[0091] According to another exemplary implementation, operators with administrative privileges can decide what categories can be used to tag chats, and also decide in what order the tags can be displayed to operators.

[0092] According to yet another exemplary implementation, chat tags can be displayed to operators in a sliding tab to the left of the chat window. The sliding tab interface can stay visible to the operator until at least one tag is selected for each chat to encourage operators to assign a tag to every chat session. After at least one tag is selected, the operator can minimize the sliding tab. The chat tags selected for a chat session can be represented by colored labels on the minimized sliding tab that correspond to the colors of the chat tag labels on the maximized sliding tab.

[0093] Non-limiting examples of categories that can be used according to exemplary implementations of certain

embodiments of the present invention include sales inquiry, recurring issue, product/feature request, satisfied customer, and unsatisfied customer.

[0094] Referring to FIGS. 8a and 8b, according to an exemplary implementation of the present invention, certain features provided as part of a user interface include:

[0095] 1. Chat tags UI open 800 next to the chat window (with a tag marked).

[0096] 2. Chat tags UI closed 802 (with same tag marked).

[0097] Yet another exemplary embodiment of the present inventions provides system and method including parent-child ticketing for project management, which allows an unresolved ticket to be broken into subordinate tickets to facilitate management of complex tasks. Referring to FIG. 9, for example, an original (or "parent") ticket can be broken into subordinate (or "child") tickets which can then be assigned to other operators to delegate tasks.

[0098] According to an exemplary implementation, in order to resolve a parent ticket, every child ticket created must be resolved. For example, operators can have the ability to break up an unresolved ticket, or tickets, into child tickets. Operators can also manage projects by, for example, creating a new "parent" ticket and assigning "child" ticket or tickets to other operators.

[0099] According to another exemplary implementation, "child" tickets can be required to be resolved in a selectable specific order. In such a non-limiting example, if "child" tickets are to be resolved in a specific order, then the creator of the parent ticket can assign this order when the parent ticket is created.

[0100] According to yet another exemplary implementation, email notifications can be automatically sent out by a ticket module to the operators assigned to "child" tickets when a "parent" ticket is created, and to the creator of a "parent" ticket whenever a "child" ticket is resolved. If, as in the example described above, the "child" tickets must be resolved in a specific order, then email notifications to operators assigned to "child" tickets are delayed until after each one has been resolved.

[0101] Yet another exemplary embodiment of the present inventions provides system and method including lead scoring, which assigns a percentage score to each unique website visitor based on a combination of identifiable visitor data and specific visitor actions. For example, a high score can indicate that visitor is a qualified lead, where qualified leads are deemed as more likely to make a purchase. In another non-limiting example, qualified leads' contact information can be passed on to a sales department.

[0102] According to an exemplary implementation, a website visitor's can be given a percentage score determined by, for example, assigning values to the visitor's data and actions in a website environment. For example, a visitor may receive 20 percentage points because the visitor is located within a certain geographical region (for example, the United States), and another 20 points when they a visitor submits contact information (for example, in order to receive further communications such as advertising or technical information). In such non-limiting exemplary situations, a lead score can be calculated and assigned to each visitor.

[0103] According to another exemplary implementation, operators can customize the scores associated with different visitor actions and characteristics. For example, in a percentage scoring scheme, when a visitor's score reaches 100

percent that visitor can be considered as a qualified lead and that visitor's contact information is passed along to, for example, a sales department along with a percentage breakdown indicative of how that visitor reached 100 percent and was deemed as qualified.

[0104] Yet another exemplary embodiment of the present inventions provides system and method including mobile live chat between an operator/agent and a client/customer. Referring to FIG. 10, an example of a graphical user interface 1000 provides for mobile live chat 1002 between an operator/agent and a client/customer using a mobile device 1004.

[0105] The above-described exemplary embodiments may be implemented as sets of instructions, including program modules to perform various operations on a computing device, stored on non-transitory computer-readable media. The media may also include, alone or in combination with the program instructions, data files, data structures, and the like. The media and program instructions may be those specially designed and constructed for the purposes of the present invention, or they may be of the kind well-known and available to those having skill in the computer software arts. Examples of non-transitory computer-readable media include magnetic media such as hard disks, floppy disks, and magnetic tape; optical media such as CD-ROM disks and DVD; magneto-optical media such as optical disks; and hardware devices that are specially configured to store and perform program instructions, such as read-only memory (ROM), random access memory (RAM), flash memory, and the like. Other media may include a transmission medium such as optical or metallic lines, wave guides, and so on, including a carrier wave transmitting signals specifying the program instructions, data structures, and so on. Examples of program instructions include both machine code, such as produced by a compiler, and files containing higher level code that may be executed by the computer using an interpreter.

[0106] Referring to FIG. 11, a system 120 illustrating an exemplary implementation of non-limiting embodiments of the present invention can include a computing device 1100 for use by an operator agent connected directly or indirectly 1118 to a server 1102, or connect 1110 via the Internet/Intranet 1108 (which includes but not limited to a wide area network or local area network). Visitor can use a computing device 1104 to connect 1116 to the server 1102 via the Internet/Intranet 1108. A live chat session between a visitor using computing device 1104 and an operator using computing device 1100 is established and conducted as describe above in the exemplary embodiments illustrated in the non-limiting examples of FIGS. 1a-10. In addition, either an operator or a visitor can connect to the Internet/Intranet 1108 using a mobile device 1106 to perform a live chat session as illustrated, for example, in FIG. 3. All of the connections 1110, 1112, 1114, 1116 and 1118 can be wired or wireless (such as Wi-Fi, Bluetooth, Radio Frequency (RF), cellular, and others) as known and understood in the art. The described hardware devices may be configured to act as, or store on their respective non-transitory computer readable media, one or more software modules in order to perform the operations of the above-described embodiments of the present invention as illustrated in the examples of FIGS. 1a-10.

[0107] Although exemplary embodiments of the present invention have been disclosed for illustrative purposes, those skilled in the art will appreciate that various modifi-

cations, additions, and substitutions are possible, without departing from the scope of the present invention. For example, non-limiting features of various embodiments of the present invention can include:

- [0108] 1. File transfer: While Chatting/Responding to tickets ability to send or receive a file from visitors.
- [0109] 2. Navigation History: Real-time tracking of website pages visitors have seen and are currently on.
- [0110] 3. Multiple domains: Ability to service unlimited websites from the same account.
- [0111] 4. Department routing: Ability to route chat sessions and tickets/emails by department.
- [0112] 5. Real-time Monitoring: Ability to monitor all chat sessions/tickets in progress real time.
- [0113] 6. Customization: Real time customization/branding of customer facing windows with immediate "go-live".

Therefore, the present invention is not limited to the above-described embodiments, but is defined by the following claims, along with their full scope of equivalents.

I claim:

1. A system for instantiating and conducting a chat session between an operator of a website and a visitor over a communication network, the method comprising:

a first computing device configured to selectively activate a first window frame by an operator instantiating at least one chat session for receiving real-time first data input from the operator and second data input from the visitor; and

a second computing device configured to selectively instantiate the at least one chat session by a visitor for receiving real-time the first data from the operator and the second data from the visitor,

wherein, during the chat session, instantiate interactive information exchange between the operator and a third party,

wherein an interactive information exchange instantiated between the operator and a third party, the first data from the operator, and the second data from the visitor are selectively displayed in the first window frame of the first computing device,

without providing access to the interactive information exchange on the second computing device.

2. The system of claim 1, wherein the chat session comprises live and interactive information exchange between the operator and the visitor.

3. The system of claim 1, wherein the first computing device is further configured to selectively activate a third window frame on the first computing device of the operator for monitoring a plurality of chat sessions, wherein the monitoring comprises generating a chat session status indicator to indicate at least one of: a visitor waiting to instantiate a chat session, a visitor waiting for response from the operator, an operator waiting for response from the visitor, an idle chat session where input from a visitor has not been provided for a predetermined period of time, and prior chat session of a visitor.

4. The system of claim 1, wherein the server is further configure to:

monitor a plurality of chat sessions; and
generate and managing a knowledge base, said knowledge comprises stored information indicative of prior chat sessions and data exchanged during the chat sessions.

5. The system of claim 4, wherein the first computing device is configured to instantiate a graphical user interface for accessing the knowledge base during a chat session.

6. The system of claim 5, wherein the accessing comprises at least one of:

- selectively adding information to the knowledge base;
- selectively searching for information previously stored in the knowledge base;
- selectively retrieving information from the knowledge base; and
- selectively displaying information retrieved from the knowledge base.

7. The system of claim 1, wherein the server is further configured to provide billboard messages including at least one of a text-based message, graphical display, and a clickable hyperlink, wherein the billboard messages comprise a window advertising panel associated with the chat session.

8. The system of claim 1, wherein the first, second and third window frames are provided via at least one of the Internet, an intra-net and an application programming interface (API).

9. The system of claim 6, wherein the selectively adding information to the knowledge base comprises retrieving information from the at least one of data input during a chat session and a ticket generated in connection with a prior or current chat session.

10. The system of claim 1, wherein the first computing device is further configured to manage emails from visitors to the website, and generate or view tickets associated with respective chat sessions.

11. The system of claim 1, wherein the first computing device is further configured to selectively activate a third window frame for monitoring a plurality of chat sessions, wherein the monitoring comprises providing a status indicator for each of the plurality of chat sessions.

12. The system of claim 11, wherein the generating of the chat session status indicator comprises color coding uniquely indicative of the at least one of: the visitor waiting to instantiate a chat session, the visitor waiting for response from the operator, the operator waiting for response from the visitor, the idle chat session, and the prior chat session.

13. A method for establishing and monitoring sessions with clients over a communication network, the method comprising:

- conducting at least one chat session between a first party and a second party;

- selectively activating a first window frame on a first computing device of the first party instantiating the at least one chat session for receiving real-time first data input from the first party and second data input from the second party;

- during the chat session, instantiating interactive information exchange between the first party and a third party without providing access to the interactive information exchange to the second party; and

- selectively displaying the interactive information exchange between the first party and the third party, the first data from the first party, and the second data from the second party in the first window frame.

14. The method of claim 13, further comprising:

- monitoring a plurality of chat sessions; and
- generating and managing a knowledge base, said knowledge base comprises stored information indicative of prior chat sessions and data exchanged during the chat sessions.

15. The method of claim 14, further comprising selectively accessing the knowledge base,

- wherein the accessing comprises at least one of:

- selectively accessing the knowledge base during the chat session;

- selectively adding information to the knowledge base;
- selectively searching for information previously stored in the knowledge base;

- selectively retrieving information from the knowledge base; and

- selectively displaying information retrieved from the knowledge base indicative of the at least one of: the visitor waiting to instantiate a chat session, the visitor waiting for response from the operator, the operator waiting for response from the visitor, the idle chat session, and the prior chat session.

16. The system of claim 12, wherein the monitoring comprises providing a status indicator for each of the plurality of chat sessions.

17. The system of claim 14, wherein the generating of the chat session status indicator comprises color coding uniquely indicative of the at least one of: the visitor waiting to instantiate a chat session, the visitor waiting for response from the operator, the operator waiting for response from the visitor, the idle chat session, and the prior chat session.

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