

1st steps upon receipt of your live chat server

Upon deploying your server, you received 3 things from us;

- a) Hyperlink to the web based server management console including the default administrator username and password.
- b) The installation Javascript which your customers will use to insert in their websites.
- c) A download link to your branded live chat client software for Windows. (If you ordered mobile apps and/or the web based chat client for your server, you will find the download links to those as well.)

Creating your 1st live chat customer

Go to your Administration console and click on the “GROUPS” tab. There is a default Group called “Main”.

Use this “Main” group to create a new account. Do that by entering an account name, username and password. Hint: It is suggested that you name the account by the domain name of your customer. So the account name will look like something like this: xyzshop.com. (If the customer will have more than 1 domain on the account, pick the main domain)

Once the new account has been created, it will appear in the accounts list in a new line with a new ID. You will have to go through the settings and configure this new account.

In the first column, you will see the “Details”. Click on the “Details” and enter the Name, Email, Phone numbers.

In the second column, you will see the Domains. Click and enter the domain(s) the operators of this account will chat on.

In the 3rd column, Set the parameters by adding account expiry date and number of operators who can access this account at any given time. Check the “Allow campaigns” tab if you want to allow the account to use the Campaign code feature of Promptchat. Promptchat supports 2x ways of tracking website visitors.

- No tracking = This is used for high traffic websites when it is not important to see in real-time the visitor list (you can save server resources when this is used)
- Pulling = means a real-time list of visitors will be shown in the visitor’s grid. (this is the common usage method)

If you own the Chat Center system, you can enable the account to be shown and managed by an external Chat Center account. Otherwise leave it blank.

In the 4th column you will see the Configurations added on the account. Each account must have minimum 1x configuration. You can configure configurations in the Administration menu inside the Windows chat client software. It is ideal for you to create a few configurations to be ready so that your customers don’t need to start from scratch upon receipt of their live chat account. For example you can create a configuration called: English language chatbox, French language chatbox, black chatbox, small white chatbox etc....



You should have a “default configuration in the system already. You can make changes to this configuration in the master default account.

In the 5th Column you can create and manage the Chat Operator credentials which are assigned to this account.

There are various methods you can install the live chatbox.

Please see detailed instructions for script installation on the Promptchat website here;

<http://promptchat.com/installation/> All you need to do is replace the “Promptchat.org” hyperlink in the shown scripts with the hyperlink of your chat server installation. All the rest is the same.

You can also create Online account generator forms. Similar to what you see here: <http://promptchat.com/start-free-live-chat-software-trial/>

In order to create your own Generator click on the Generators tab in your Admin Panel.

You will be able to pick a template account which the generator will use for all newly created accounts through the generator form. You can edit in HTML all the text in the generator. When finished at the bottom of the page you will see a Script. Insert this script into an IFrame of the HTML of the website you will be inserting this Online Account Generator form. If you need help with this, feel free to contact us for the account generator HTML we use. You can just edit that text and no need to edit html.

Here is an example generator script including the IFrame tags:

```
<center><iframe
src="http://promptchat.org/PC40/Administration/AccountRegistration?Code=d97bfbfd01c1df7fd59bca5e408ecaa93" width="670"
height="600" frameborder="0"
scrolling="no"></iframe></center><script
type="text/javascript">Promptchat_NotifyForEvent("account
registrations");</script></p><div class="clr"></div>
```

That’s all you need to be able to create and login to a newly created account.

Make sure the Javascript is in the website of the corresponding domain(s).

For Help – please contact Promptchat Support on info@promptchat.com