
Visitor Chat^{v1.2.2} User Manual

Thank You

Thank you for choosing ClientEngage Visitor Chat. This guide will provide you with a one-stop support document that helps you make your first steps with ClientEngage Visitor Chat.

This manual will guide you through the installation process and provide you with an overview of the core functionalities of ClientEngage Visitor Chat.

About ClientEngage Visitor Chat

The ClientEngage Visitor Chat is a fully-featured real-time chat for your websites. A clear and simple web-based administration allows you to conveniently chat with your visitors. And best of all: Visitor Chat comes with a Windows-based client out-of-the-box. Without having to visit the Visitor Chat's admin-interface you will be notified from your Windows tray and can start chatting straight away!

By including one single snippet of JavaScript, this interactive and engaging Chat can be used on any website – whether you are using Wordpress, Joomla! or plain HTML.

The Visitor Chat will give put you at your clients' and visitors' fingertips at those times when they have burning questions – turning your prospects into your future paying customers. Not around for 16 hours of the day? No problem! Visitor Chat will go into enquiry-mode and collect all enquiries in an easily navigable format where you can mark enquiries as read/unread to stay on top of things.

Moreover, the chat system presents you with up-to-date information on the people you talk to: where have they come from? What page are they on? Which browser and OS are they using? What time is it at their end? Visitor Chat answers all of those questions for you.

www.ClientEngage.com



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1. About ClientEngage Visitor Chat

The ClientEngage Visitor Chat is a fully-featured real-time chat for your websites. A clear and simple web-based administration allows you to conveniently chat with your visitors. And best of all: Visitor Chat comes with a Windows-based client out-of-the-box. Without having to visit the Visitor Chat's admin-interface you will be notified from your Windows tray and can start chatting straight away!

By including one single snippet of JavaScript, this interactive and engaging Chat can be used on any website – whether you are using Wordpress, Joomla! or plain HTML.

The Visitor Chat will give put you at your clients' and visitors' fingertips at those times when they have burning questions – turning your prospects into your future paying customers. Not around for 16 hours of the day? No problem! Visitor Chat will go into enquiry-mode and collect all enquiries in an easily navigable format where you can mark enquiries as read/unread to stay on top of things.

Moreover, the chat system presents you with up-to-date information on the people you talk to: where have they come from? What page are they on? Which browser and OS are they using? What time is it at their end? Visitor Chat answers all of those questions for you.

With ClientEngage Visitor Chat you will get to the heart of what your visitors/clients think.

1.1. Functionality Overview

Fully-Featured Chat for your Website

- Non-intrusive chat for your websites
- Clear administrator chat-interface
- View additional metadata of your visitors (pages they are on, referrers, and more)
- Unlimited number of administrators
- Easy to translate

Windows-based client included

- Don't want to keep a browser window open all day long?
- You are notified of new visitors in real-time and can start chatting straight through the Windows-based client
- The chat disappears to your system tray until you have a visitor opening the chat

Adaptable Templates & Translations

- Have a chat that fully blends with the look and feel of your website
- Comes with four pre-defined colour schemes
- You can create an unlimited number of new chat styles and you have full control over the CSS
- All visitor-facing texts can be easily changed

Easy Integration & Use

- Simple copy & paste integration of your feedback survey into **any** website: just copy a brief JavaScript code into the respective site's HTML template
- Automated installation script – no extensive knowledge of PHP/MySQL necessary
- Detailed handbook with installation & use instructions
- Extensible: the system is developed with the CakePHP MVC framework and features a clean architecture. This means that, if you have web-development experience, the system is easily extensible

2. System Requirements

In order to be able to use ClientEngage Visitor Chat, you must fulfil the following system requirements:

- Apache 2 HTTP Server
- Preferably with `mod_rewrite` enabled
- PHP with a version of greater than `PHP 5.2.8`
- MySQL with a version of greater than MySQL 5 (i.e. with InnoDB support)
- Preferably a subdomain/domain for use with ClientEngage Visitor Chat
- Safe mode: off
- Enough server-resources for the number of concurrent chatters you expect
- Finally, the PHP PDO extensions have to be installed (PDO & PDO MySQL)

Furthermore, you have to ensure that the following directories, as well as their subdirectories and the files contained therein, are writable:

- Temporary Directory: `app/tmp/`
- Configuration Directory: `app/Config/`
- Upload Directory: `app/uploads/`

A note on server performance:

This chat system employs AJAX technologies and does not rely on WebSockets for its communication. This means that anyone can run Visitor Chat, as long as your server fulfils the requirements outlined below. However, this also means that this system is not intended for heavy-duty use: so don't build the next Facebook and try to have 10m people use this at once. That being said, on average server-specifications, there is nothing stopping you from having 10-15 concurrent conversations.

System requirements of the Windows-based client:

- .NET4 Framework (will be installed if not already available)
- Windows XP, Windows Vista, Windows 7, Windows 8

3. Updating from an Earlier Version

3.1. Updating Procedure

If this is your first time installing ClientEngage Visitor Chat, please continue reading on page 6.

If you are updating from an earlier version of ClientEngage Visitor Chat, then please follow the following steps:

1. **[Important]** Create a **full** backup of your system-files **and** database
2. Upload the contents of the directory “ClientEngage UPDATE” on the server into the same directory where you have installed ClientEngage Visitor Chat; do **not** use the “ClientEngage System” directory
3. Overwrite all files and folders when prompted
4. You have to ensure that the following directories, **as well as subdirectories and all files and directories contained therein**, are writable:
 - Temporary Directory: `app/tmp/*`
 - Configuration Directory: `app/Config/*`
5. Point your browser to the URL of your ClientEngage Visitor Chat installation
6. Finally, follow the on-screen instructions and perform the one-click update
7. After the installation has finished, you can remove write-permissions from the `Config-` directory

In the unlikely case that the update progress was unsuccessful, please replace the whole application directory and database with the backup you created.

Furthermore, please note that you will need to merge any custom code back into the system since the ClientEngage Visitor Chat interface as well as codebase will be reset to the current development state. If you wish to keep your own custom translations please refer to section 3.2.

Important: after installing the update, navigate to “Administration → Settings” and configure any new configuration settings. Even if you do not change anything, it is **important** that you click “Save”.

Finally, uninstall & reinstall the Windows-based client when you update ClientEngage Visitor Chat. Please first uninstall the old version here: Control Panel → Software, **then** install the new version.

3.2. Keeping Your Custom Translation Files

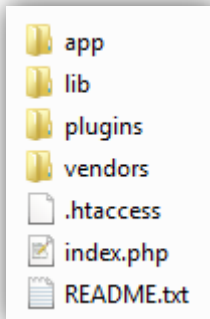
Since you may have added your own custom translations of the ClientEngage Visitor Chat, or you may have adapted the existing translation files, you need to perform the following steps so as to be able to keep your changes:

1. Do **not** overwrite the Locales directory in “app/Locale” with the one in the “ClientEngage UPDATE” directory (you can do this by deleting it from the update directory before moving “ClientEngage UPDATE” to your server)
2. After finalising the update, simply open each of the translation files, such as “app/Locale/deu/LC_MESSAGES/default.po” with Poedit and select “Catalog -> Update from POT file”
3. Next, please select “app/Locale/default.pot”; you can now update any new translation strings that were added since the last version of ClientEngage Visitor Chat

4. Installation

4.1. System Upload

Upload the contents of the directory “ClientEngage System” to your webserver. You should now have the following directory structure on your webserver:



For best results you should run ClientEngage Visitor Chat under a domain or subdomain. If you wish to do this, then you should point (*not* redirect) your domain to the following directory: `SERVERDIR/app/webroot/`.

If you are using an Apache server, you can accomplish this by setting the “DocumentRoot” directive to the aforementioned directory. If you do not have access to your server’s configuration, your domain management interface should provide you with a setting that allows you to point your domain/subdomain to this directory.

It is recommended to run ClientEngage Visitor Chat from a domain/subdomain pointed to the webroot directory, since this keeps all of the system’s files outside of the document root.

4.2. Setting File/Directory Permissions

You have to ensure that the following directories, **as well as subdirectories and all files and directories contained therein**, are writable:

- Temporary Directory: `app/tmp/*`
- Configuration Directory: `app/Config/*`

After the installation has finished, you can remove write-permissions from the `Config`-directory.

4.3. Accessing the Automatic Installation Tool

You can now access ClientEngage Visitor Chat by navigating your browser to your ClientEngage Visitor Chat installation, such as: `http://chat.example.com`

If you do not encounter any errors, please carry-on reading at 4.4.

If you see an error *and* are using GoDaddy as your webhost, please perform [this change](#) on your “app/webroot/.htaccess” file. If you do *not* use GoDaddy and you receive an Internal Server Error, then it is likely that your webserver (mod_rewrite) is not correctly configured. In this case, please use a text-editor (such as Notepad++) to open the following file: `app/Config/rewrite-core.php`

Next, please change line 16 from this:

```
// Configure::write('App.baseUrl', env('SCRIPT_NAME'));
```

To this:

```
Configure::write('App.baseUrl', env('SCRIPT_NAME'));
```

Finally, please delete the `.htaccess` files in the following directories:

- `ROOT/.htaccess`
- `ROOT/app/.htaccess`
- `ROOT/app/webroot/.htaccess`

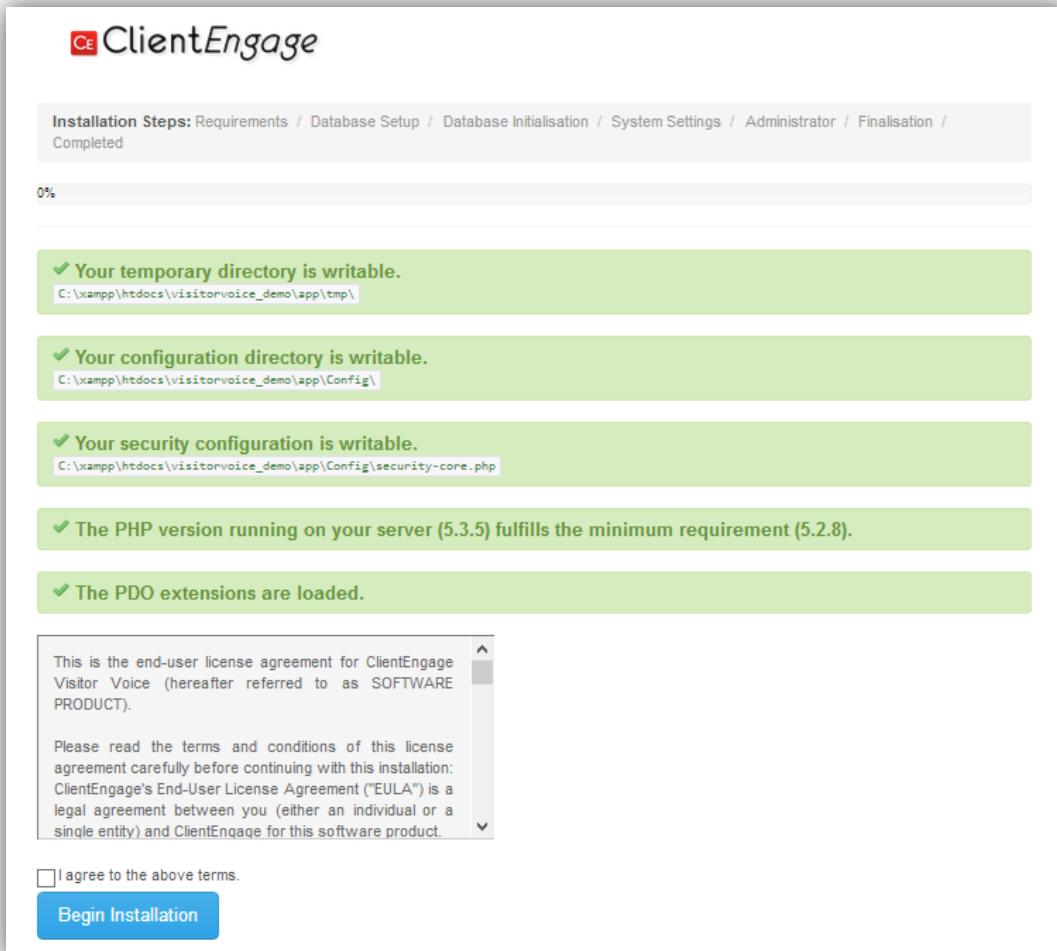
Now, please access the installation tool under the following address:
<http://chat.example.com/index.php>

If you use this method, your ClientEngage Visitor Chat installation will always be available under the aforementioned address.

4.4. Installation Procedure

You can now access ClientEngage Visitor Chat by navigating your browser to your ClientEngage Visitor Chat installation, such as: <http://chat.example.com>

You should now see the following screen:

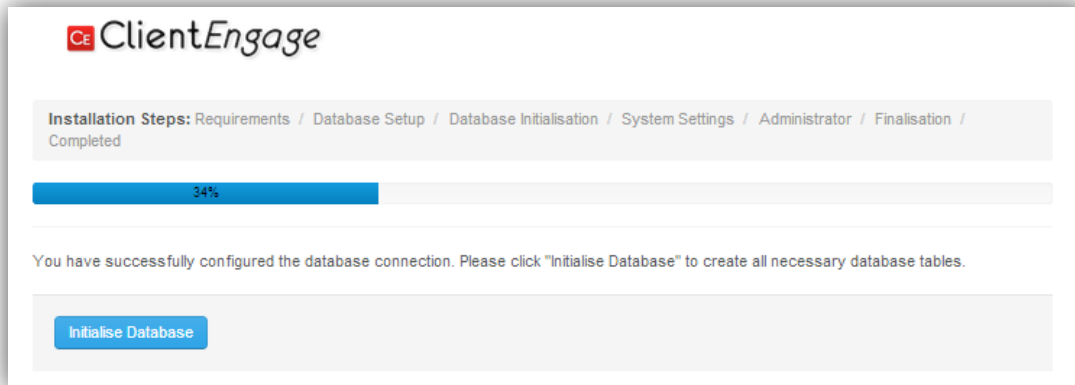


If your system fulfils the requirements, you can commence the installation process after reading and accepting the end-user license agreement.

In the next screen, please enter your database details (the port is optional). It is important that you create the database before entering your details (Collation: "utf8_unicode_ci"):

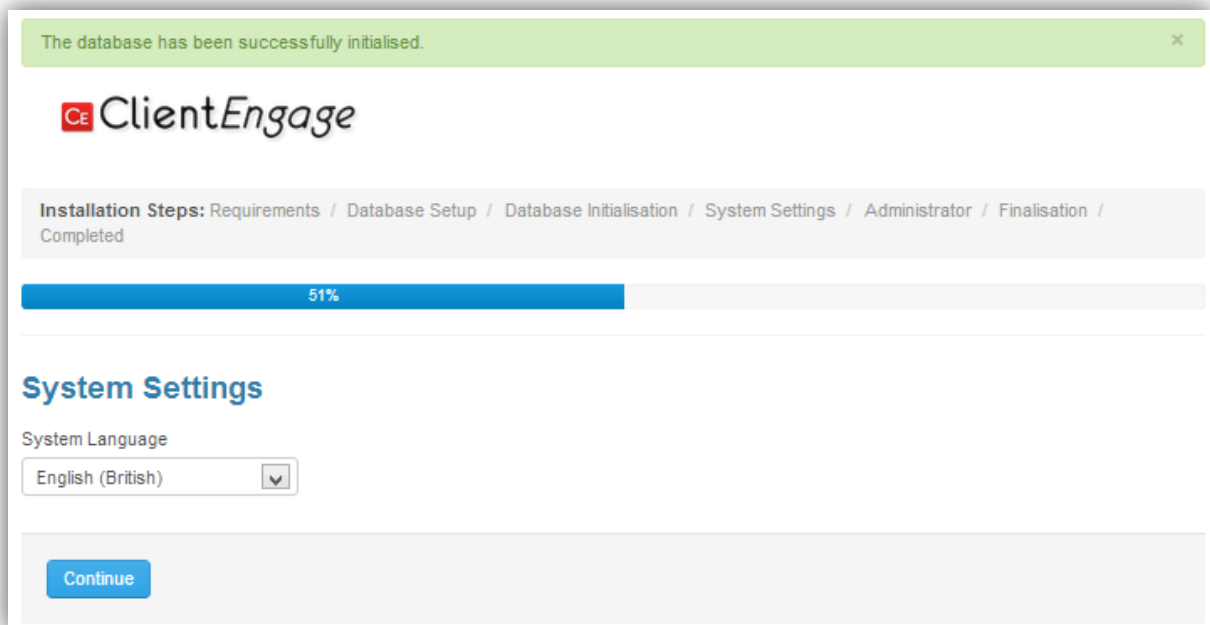
| | |
|------------------------|---|
| Database Host | <input type="text" value="localhost"/> |
| TCP Port / UNIX Socket | <input type="text" value="Optional"/> |
| Database Username | <input type="text"/> |
| Password | <input type="password"/> |
| Database Name | <input type="text" value="clientengage"/> |
| Table Prefix | <input type="text" value="ce_"/> |

Click "Continue". If the details you entered are correct, you will see the following screen:



Click "Initialise Database" and wait for the process to finish.

Now, select your language setting and click "Continue":



You can now create your administrative user in the following form:

The screenshot shows the 'Administrator Settings' form within the installation process. At the top, a progress bar indicates 68% completion. The breadcrumb trail reads: 'Installation Steps: Requirements / Database Setup / Database Initialisation / System Settings / Administrator / Finalisation / Completed'. The form contains the following fields:

- Username ***: Input field containing 'John Doe'.
- Email ***: Input field containing 'john@clientengage.com'.
- Password ***: Input field with masked characters '****'.
- Confirm Password ***: Input field with masked characters '****'.

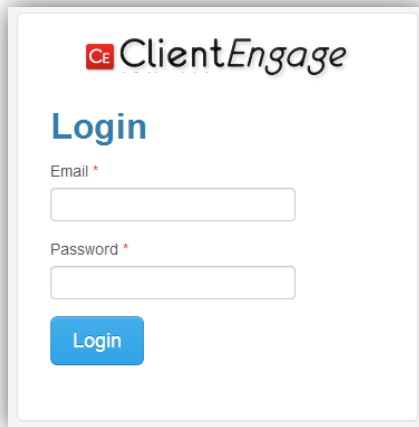
A blue button labeled 'Finalise Installation' is located at the bottom of the form.

Please ensure that you remember the email address and password you choose – you will need these to log into the system. Click “Finalise Installation” when you are done”.

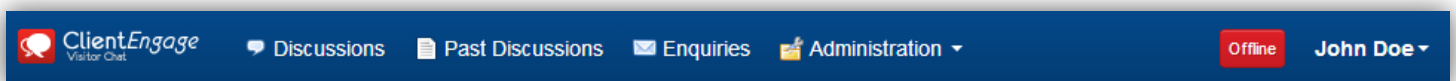
You have now reached the final step of the installation process:

The screenshot shows the final step of the installation process. A green notification banner at the top states: 'The administrator has been created.' Below this is the ClientEngage logo. The breadcrumb trail is: 'Installation Steps: Requirements / Database Setup / Database Initialisation / System Settings / Administrator / Finalisation / Completed'. A progress bar shows 85% completion. A blue button labeled 'Perform Final Configurations' is visible at the bottom.

Click “Perform Final Configurations” and wait for the process to finish. If the installation process was successful, you will be automatically redirected to your log-in screen. The login will always be accessible at <http://chat.example.com/login/>. Please type in the email address and password of the administrator you created during the installation process:



After logging-in successfully, you will see the administration panel and you can begin using ClientEngage Visitor Chat to gather invaluable feedback from your visitors:



The first thing you should do is to navigate to “Administration → Configuration” in order to perform any necessary configurations before you start using ClientEngage Visitor Chat.

4.5. Changes to Database Credentials

If you change your database login information, then you have to reflect these changes in the following file: “app/Config/database.php”.

4.6. Windows-based Client Installation

Simply double-click the installer’s EXE file (ClientEngage Visitor Chat.exe) and follow the installation instructions. If the correct .NET Framework is not installed on your machine, Visitor Chat will download and install it for you. If you are updating from an earlier version, uninstall the old one **first**.

After the installation, you will be asked to provide your Envato purchase-details. After you have activated the Windows-based client, you simply need to enter your credentials:

Simply start the Windows-based client and enter your credentials. First, you need to get the API-Endpoint from your system’s configuration section in “Administration → Configuration”.

Simply paste the Endpoint-URL and type your ClientEngage Visitor Chat email and password.

5. Using ClientEngage Visitor Chat

5.1. Including the Chat on your Website

Simply navigate to “Administration → Configuration” and copy the JavaScript snippet. Now, please insert it into the website where you wish to use the Visitor Chat. If you are using jQuery, please insert it **after** you include jQuery – if jQuery is not available on your website, Visitor Chat will automatically include it.

5.2. System Configuration

The main system configuration contains three settings: one for your default timezone and one for selecting the system’s interface language. If you wish to translate ClientEngage Visitor Chat into a different language, then please refer to section 6.1.

The next setting allows you to select your custom Chat-style – this will be used across all pages where you have included the Visitor Chat code.

Finally, you can easily change all translations (texts, buttons, error messages, etc.) that are displayed to your visitors.

5.3. Creating new Chat Styles

Simply navigate to “Administration → Chat Styles” and click “New Style”. It is helpful, if you simply copy one of the default styles and then change it to suit your needs.

You can use the variable placeholder {BaseURL}, which points to the webroot of your Visitor Chat installation: “http://chat.example.com/” – you can use this placeholder to refer to any CSS background-image properties.

5.4. Going “On-Line”

In the main navigation menu, simply click the “Offline” button. You are now on-line and your visitors will see that the chat is currently active. All active chat sessions will be shown in the “Discussions” section of your website.

You can change between discussions, simply by changing your current discussion-tab. On the right-hand side you are shown a range of different information about your visitors.

In case a visitor has manually exited the chat or timed out (after 15 minutes of inactivity) a small “X” icon will be shown – this enables you to clear-out finished discussions.

If you wish to go offline, you simply need to click the “Online” button in your main menu. If you are online, your visitors will be shown the Enquiry-form instead of the live-Chat sign-up form.

5.5. Using the Windows-based Client

Simply start the Windows-based client and enter your credentials. First, you need to get the API-Endpoint from your system's configuration section in "Administration → Configuration".

Simply paste the Endpoint-URL and type your ClientEngage Visitor Chat email and password.

If you minimise the client, it will be placed in your system tray. You will be notified of any new chats through a Balloon-Tooltip as well as a non-intrusive notification sound. When minimised, the client will check for any new messages with a 10-second interval – this will be increased to a 3-second interval whilst you are in an active chat-session.

Similarly to the web-based client, you can rotate through all active discussions via a tab-control.

5.6. Reviewing Past Discussions

Under "Past Discussions" you can find a paginated list of all your past discussions for future reference. You can sort by a variety of fields to make it easier for you to find the right discussion you are looking for.

By clicking on "View" you can see all of the respective discussion's details.

5.7. Enquiries

If you are offline, your chat will display an enquiry form for your visitors through which they can send you an Enquiry consisting of their name, email address and a 750-character long message.

The Enquiries section contains a list of all enquiries that were sent by your visitors whilst you were offline. Once you have viewed an enquiry, it will be marked as read. However, you can easily change the status of an enquiry back to "unread". Moreover, in the "View" dialog, you can see a wide range of information about the visitor, as well as the actual enquiry.

5.8. General Information

The minimised chat will check for new messages in a 10-second interval. If you or your visitors are actively chatting, then the interval is usually 2 seconds. However, if there have been extended periods of inactivity, the interval slowly increases to 10-second intervals until there is new activity (at which point the interval increases to 2 seconds again).

Rest assured that ClientEngage Visitor Chat will always make sure that the ideal update-intervals are used.

If a visitor is not currently taking part in a chat session, the system will ping your chat-server every 15 seconds to check if any administrators are currently available.

6. Extending ClientEngage Visitor Chat

6.1. Translating ClientEngage Visitor Chat

You can easily translate ClientEngage Visitor Chat into your own language by performing the following steps:

1. Create a folder with your language's code within "app/Locale/yourcode/"; you need to use the three-letter locale-code which you can find [here](#) (the code on the left)
2. Next, create the following subfolder: „app/Locale/yourcode/LC_MESSAGES/“
3. Open Poedit (www.poedit.net), select "File -> New catalog from POT file" and select "app/Locale/default.pot"
4. You can now translate all the strings used within the application and save the file as "app/Locale/yourcode/LC_MESSAGES/default.po" repeat the same process for "cake.po" to translate time-specific strings
5. Repeat the same process by opening "cake.pot" and saving it next to your newly created "default.po" (you should have cake.po and default.po in your LC_MESSAGES directory)
6. Now open "app/Lib/GlobalClasses.php" and add your language around line 200, your language code is the index of the array item and the display-name is the value
7. Finally, please go to "Administration → Configuration" and select your language

I am always looking for user-contributed translations of ClientEngage Visitor Chat. If you have translated the system into a language that is not yet part of the default languages, please consider sharing your translation with me. To reciprocate, I can offer you an attribution with backlink on the item page. Please get in touch via email: contact@clientengage.com

6.2. Customising HTML-Templates

Are there certain areas of the system which you would like to change in terms of their layout? You can easily adapt any visual aspect of the system by amending the template files. You can find individual "pages" in "app/View/AREANAME/PAGENAME" and the main layouts in "app/View/Layouts/".

However, please be advised that any custom changes to the default layout will be lost if you decide to upgrade ClientEngage Visitor Chat in the future. Therefore, it is advisable that you keep a list of all your custom changes to enable you to merge them back into the system after updating. Furthermore, there are free merge-utilities which may be able to help you in this respect.

7. Helpful Resources

If your system fulfils the minimum requirements, then you should have no problems in running ClientEngage Visitor Chat. However, some developers may wish to adapt ClientEngage Visitor Chat. There are some helpful resources that may help you accomplish this.

First and foremost, you should have good knowledge of general web development practices and, in particular, PHP 5. You may also wish to check-out the documentation of the amazing PHP Framework on basis of which ClientEngage Visitor Chat is built: CakePHP.

The best place to learn about CakePHP is to visit <http://www.cakephp.org> and, in particular, the documentation under <http://book.cakephp.org>.

Please note that, currently, ClientEngage Visitor Chat uses CakePHP 2.3.2 – this is subject to change with future revisions and additions to Visitor Chat.

8. When Encountering Problems

If you encounter any problems whilst using ClientEngage Visitor Chat, please first ensure the following:

1. Did you **recursively** set your write permissions for the respective folders that need it?
2. Does your system fulfil the minimum requirements?
3. If you receive upload-errors, what is your server settings' max-upload and post size?
4. Are you using GoDaddy as your webhost? Then please follow [these instructions](#).
5. If your system *does* fulfil the minimum requirements, then please do get in touch through the CodeCanyon author profile (i.e. the e-mail form). You will receive a response as soon as possible to propose a solution.
6. Furthermore, please also keep an eye on Visitor Chat's FAQ section on CodeCanyon – this is where common questions will be answered over time.

9. Feedback is Welcome

Do you have any feedback, praise or a particular problem? Do you have great ideas for future additions to ClientEngage Visitor Chat? Then please do send these through ClientEngage's CodeCanyon profile or email these to contact@clientengage.com. I am always on the lookout for clients' input to make future offerings even better. After all – I want all my clients to be delighted with their purchases.

10. Third Party Components: Credits

This application was made possible with the help of various third party components. For a list of attributions, please see below.

CakePHP

This application was built using the amazing CakePHP framework.

License: MIT License

Path: `lib\Cake\LICENSE.txt`

Website: <http://www.cakephp.org>

Twitter Bootstrap

Many of this application's visual aspects were made possible by using the Twitter Bootstrap framework.

License: Apache License v2.0

Path: `app\webroot\css\bootstrap\LICENSE`

Website: <http://twitter.github.com/bootstrap/>

jQuery

Many aspects of the user interaction logic use jQuery.

License: MIT License

Path: `app\webroot\js\jquery\MIT-LICENSE.txt`

Website: <http://jquery.com/>

famfamfam Icons

A subset of the amazingly brilliant famfamfam icon set was included in this application.

License: Creative Commons Attribution 2.5 License

Path: `app\webroot\img\icons\readme.txt`

Website: <http://www.famfamfam.com/>

jQuery blockUI plugin

blockUI provides some great functionality to prevent form re-submissions.

License: MIT License

Path: `app\webroot\js\jquery\plugins\MIT-LICENSE.txt`

Website: <http://malsup.com/jquery/block/>

CryptoJS 3.1

License: New BSD License

Path: `https://code.google.com/p/crypto-js/wiki/License`

Website: <https://code.google.com/p/crypto-js/>

Codemirror

License: MIT-Style License

Path: `app\webroot\js\codemirror\LICENSE`

Website: <http://codemirror.net/>

php-user-agent

License: MIT License

Path: `app\Vendor\php-user-agent\LICENSE`

Website: <https://github.com/ornicar/php-user-agent>

jsmin-php

License: MIT License

Path: `app\Vendor\jsmin\jsmin.php`

Website: <https://github.com/rgrove/jsmin-php>
