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Real Dialogue Getting Started Manual

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Introducing Real Dialogue

Welcome to Real Dialogue, an application that enables you to monitor Visitors as they navigate through your web site, and then prompt a live discussion with any visitor. The Visitor is not required to download any software in order to participate in a conversation with you, the NetRep. When a Visitor is engaged by a NetRep, a conversation interface is displayed on the Visitor's browser. Visitor's can then converse with sales or service representatives as they continue to navigate normally through the site.

Real Dialogue can be custom configured to support your specific corporate goals. Your presence can be completely hidden until you, the NetRep, initiate a conversation with the Visitor. Other configurations allow for the Visitor to request a conversation with a NetRep acting as a customer service representative, support service technician or sale representative, depending on the Visitor's needs.

About this Guide

Before you begin to use Real Dialogue. Be sure to read this guide for installation instructions and other important information. This guide contains the following information:

- An overview of the basic architecture of Real Dialogue.
- Web site design issues and configurations.
- Instructions for installing the server components of Real Dialogue.
- Instructions for installing the Client component of Real Dialogue.

System Requirements

Server (Redirection or Local Installation)

To install and use Real Dialogue you need the following hardware and software:

- A Pentium 166Mhz or faster PC
- Microsoft Windows NT Server 4.0, with service pack 3, or later.
- Microsoft's Internet Information Server 3.0 or later.
- At least 64 MB of RAM available for the application.
- A Paging file at least 128 MB in size.
- A hard disk with at least 25 MB of free space.
- 10 Mbit ethernet connection to the Internet

Real Dialogue performance improves, on very busy web sites or with a local installation configuration, with more RAM, faster CPUs, and faster hard drives.

Client Application

To install and use Real Dialogue you need the following hardware and software:

- A Pentium 100Mhz or faster PC
- Microsoft Windows 95 or Windows NT.

- At least 32 MB of RAM.
- A hard disk with at least 5 MB of free space.
- A 10 Mbit Ethernet or 28.8 kbs connection to the Internet.
- Sound Card (Improved audio notification of a request for contact)

Real Dialogue package contents

The Real Dialogue software package contains the following items:

- The *Getting Started* manual (This manual)
- The Real Dialogue CD-ROM
- A Registration Card

Registration

We are confident that you will find that the Real Dialogue suit of products will greatly increase your Web Sites profitability/usefulness. So we can continue to provide you with the highest-quality software, offer technical support, and keep you informed of new developments, please register your copy by filling out and returning the inclosed warrantee registration card.

About Real Dialogue products and services

For more information about Real Dialogue products and services, you can use Real Dialogue's Home Page. To open the Real Dialogue Home Page, from the world Wide Web, use URL <http://www.real-dialogue.com>.

Architectural Overview

Components

NetRep Client

The NetRep client application allows the NetReps to manage and communicate with up to five Visitors simultaneously. It maintains a list of all the Visitors on the web site and a list of the Visitors the NetRep has presently Engaged. It also provides the following capabilities to the NetRep:

- Review Click History
- Send predefined or custom messages

Browser

The Visitor's browser will receive a custom frame set when they are Engaged. The frames will contain both sides of the conversation and the current page that the Visitor was viewing at the time they were Engaged. The Visitor will be able to perform the following actions:

- Review both sides of the conversation
- Send a Message
- Move about the site normally

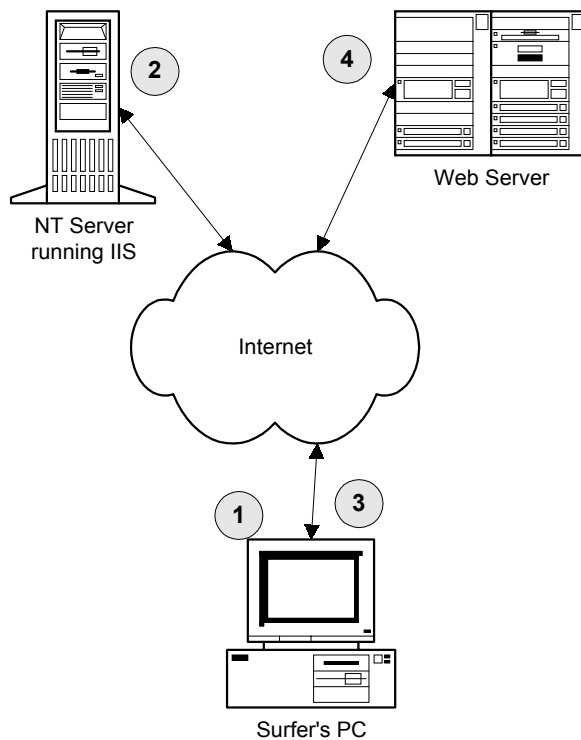
Depending on how the system is configured the Visitor may have the ability to Release themselves if they no longer want to be Engaged.

Configuration

Real Dialogue has two basic configurations, Redirection and Local Installation. Redirection is primarily used when the web site that Real Dialogue is to be installed on is not using Microsoft's Internet Information Server. The Local Installation is for web sites running on Windows NT and using Internet Information Server.

Redirection

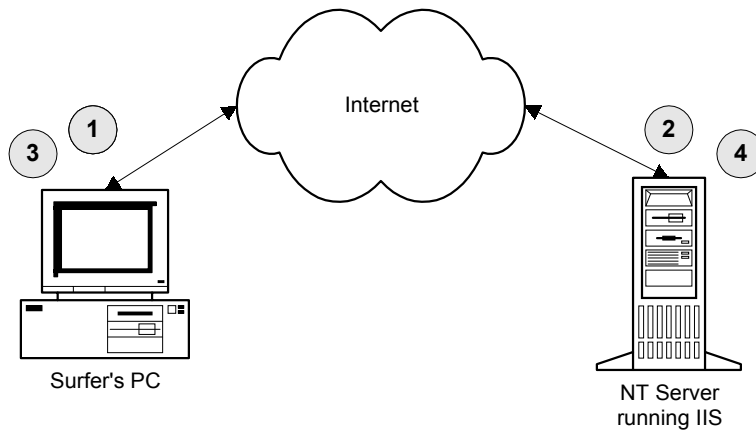
Real Dialogue is installed on an NT server running IIS [Netscape Server, for Windows NT and Solaris, support will soon be available]. All the Real Dialogue components will be installed locally on the NT server. The web site will be hosted by another server. The two servers need not be on the same LAN, they can be connected over the Internet. The server hosting the web site can be running any operating system and web server software package. The primary machine accessed by the Visitor will be the NT server. The NT server will return a frame set to the Visitor's browser that will request the content pages from the web server hosting the site.



1. The Visitor's request for a page is sent to the NT server running IIS and Real Dialogue.
2. The server returns a frame set to the Visitor's browser.
3. The frame set, in turn, requests the content pages from the other, and primary, web server.
4. The Web server returns the content page to the Visitor's browser and displays it in the appropriate frame.

Local Installation

Real Dialogue is installed on the server hosting the web site that will be using Real Dialogue. The server must be running Windows NT and Microsoft's Internet Information Server [Netscape Server, for Windows NT and Solaris, support will soon be available]. This configuration requires less hardware and is easier to install and manage.

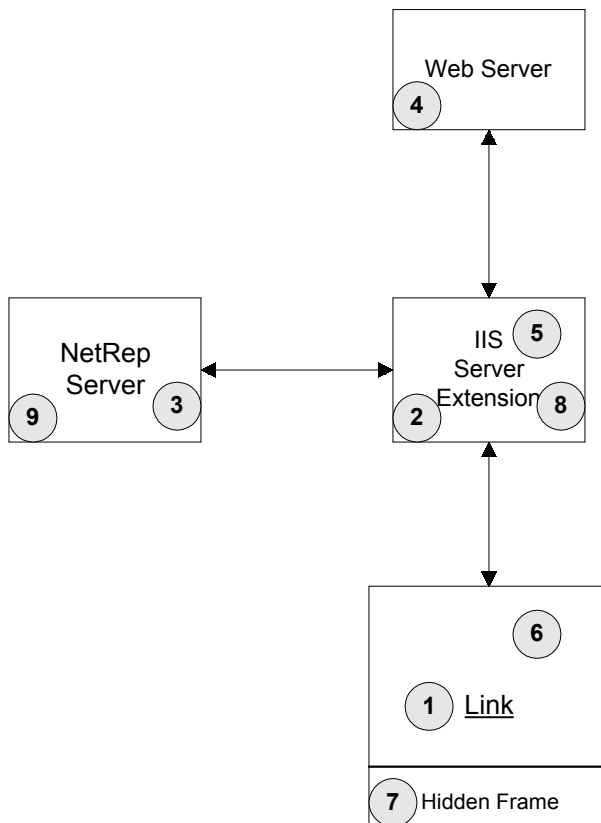


appropriate frame.

1. The Visitor's request for a page is sent to the NT server running IIS and Real Dialogue.
2. The server returns a frame set to the Visitor's browser.
3. The frame set, in turn, requests the content pages from the server.
4. The server returns the content page to the Visitor's browser and displays it in the

Process Flow

The process demonstrated here is the same for Redirection or the Local Installation configurations. The only difference is that in the Redirection configuration the Web Server is running on a different server than the NetRep Server and IIS Server Extension.



- (1) A Visitor to the website clicks on a LINK to request a new page. The link has been modified to direct that request to the IIS Server Extension, passing the URL of the page requested and a unique ID identifying the Visitor as parameters.
- (2) The IIS Server Extension splits the request into two parts. One part goes to the Web Server and requests the website page. The other part is sent to the NetRep Server, which handles Visitor tracking and conversations.
- (3) If the Visitor is engaged in a conversation, the NetRep Server returns that conversation to the IIS Server Extension; otherwise the Visitor's movements are updated in the NetRep Server.
- (4) The Web Server returns the website page to the IIS Server Extension.
- (5) The Server Extension combines the website page and the conversation (if any) into a single document and returns that to the Visitor's browser, along with a hidden "heartbeat" function.
- (6) The Browser displays the new page (containing its own modified links).
- (7) The Heartbeat function periodically sends a short message to the Server Extension, indicating the Visitor is still on the site.
- (8) The Heartbeat is passed on to the NetRep Server by the Server Extension.
- (9) The NetRep Server manages information on all the website's Visitors and updates that information for each NetRep client logged into the Netrep Server.

Web Site Design

Real Dialogue needs to be integrated with your web site.

Installation and Starting Real Dialogue

This section describes how to install the software included on the Real Dialogue software package. You must install the software from the Real Dialogue CD-ROM onto your hard drive; you can not run the program from the CD-ROM.

Installing the server components of Real Dialogue

Use the following procedures to install Real Dialogue on your server.

To Install Real Dialogue for a Re-direction Configuration

To Install Real Dialogue for a local Configuration

Start Real Dialogue

Installing the Client Application

Installing Sample Sites

Test the Installation