# CONVERSATIONS
# Admin Training Guide

## WELCOME TO CONVERSATIONS!

As an Admin of Conversations, we want to provide you with the toolkit needed to successfully navigate Conversations' reporting and customization. This Training Guide will assist you in the why, the what, and the how in working as an Admin in Conversations!

**Join our Live Workshop!**

We wanted to make our Guide as interactive as possible!
The following icons will appear throughout this Guide, so we wanted to introduce you to them here!

### Home

Click the home button to navigate back to the Table of Contents (located on the next page). From the Table of Contents, you will be able to quickly view new sections.

### How-To Quicklist

Look for the how-to quicklists for a brief summary of specific features within Conversations!

### Play a Video!

When you see this icon, follow the link to watch a video!

### Best Practices

How to is important, but we didn't want to leave out the strategy!

### Check Your Knowledge

We've set up knowledge checks along the way for you to test your know-how!

ADMIN

# Home
# Table of Contents

## CLICK THE TITLES TO NAVIGATE TO THAT SECTION



**Click each section above to dive directly into a topic,**
**or start scrolling ⏬ to explore all that Conversations has to offer!**

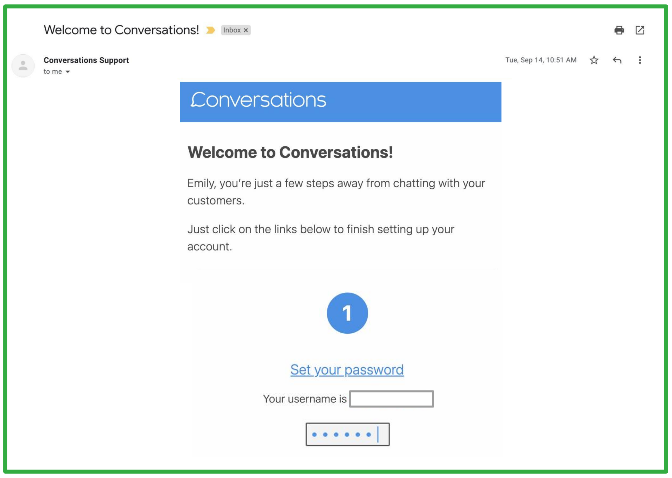

# Logging in to Conversations

Meet Josephine! Josephine is the new Manager at her Dealership, DI Motors, and has just been set up with a login for Conversations.

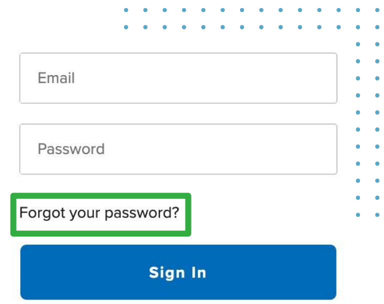
We'll walk Josephine through the entire process... starting with logging in!

Conversations can be accessed by navigating to: https://conversations.dealerinspire.com/ on Google Chrome.

When you are registered as a user, you should have received an activation email to set your password.




If you ever forget your password, click **"Forgot your password?"** to reset it.




You will receive an email from Conversations with instructions on how to reset your password.

If you need to get someone set up with a username, email Conversations Support at: conversationssupport@dealerinspire.com

## How-To Login

1. Navigate to conversations.dealerinspire.com
2. Enter your email address as a username
3. Enter the password you set up
4. Reset your password as needed

## Best Practice

Bookmark the URL ☆ conversations.dealerinspire.com

... to easily navigate back each time you log on!

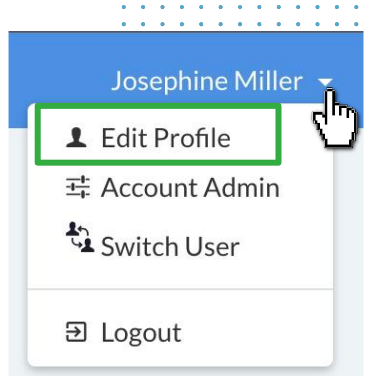
Chrome is the recommended browser!

ADMIN

# Profile Set Up

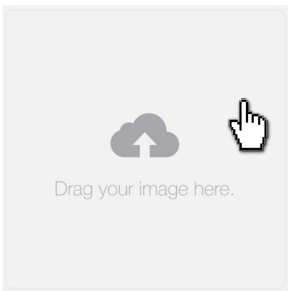
Josephine is now logged in to Conversations! 🎊

Now she needs to make sure to set up her profile and do the initial setup if she wants to receive chats from customers.



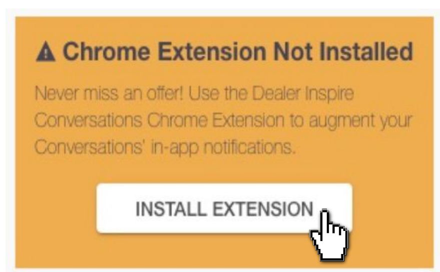

1. Click your name in the upper right-hand corner and select **Edit Profile**

2. Upload a picture of yourself by dragging and dropping an image from your desktop or by clicking the image and uploading from your computer



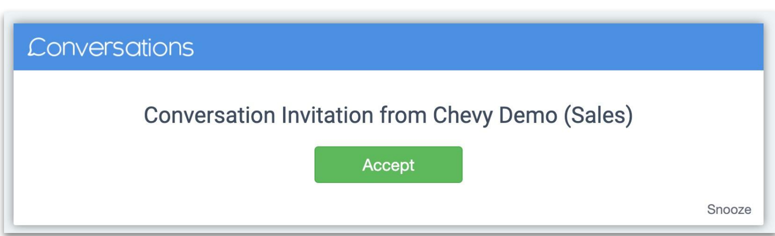

**Recommended Image Size**
Images 140px square or greater will look best, but **222px square is preferred**

3. The next step is to install the **Chrome Extension** so that you can get notified when customers are looking to chat on your site
   - This is only for desktop, not for mobile




4. Once you've installed your extension, **refresh the screen** on your profile

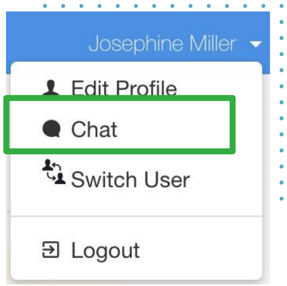
Once you see ✅ **Extension Installed** you're all set to receive notifications like the one below, when customers are looking to chat on your site:

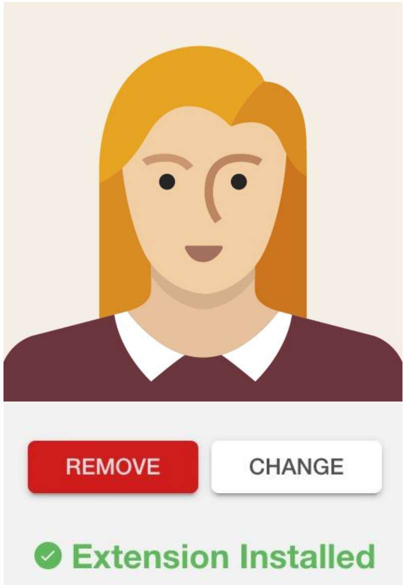




# Setting up to Receive Chats

5. Once your picture is uploaded and you see the Extension Installed like Josephine to the right, click your name in the top right-hand corner again, now click "🗨 **Chat**"




6. You will only be able to **receive chats from the Chat screen**, not while in Edit Profile or Account Admin

Finally, set your availability to **Available**.

- 🟢 **Available** - will receive all incoming chats/transfers
- 🟡 **Away** - blocks new customer Conversations, you can receive transfers and internal chats
- 🔴 **Do Not Disturb** - will block all incoming chats and transfers

⚠️ Note: If you or a member of your team are  still not receiving chats, as an Admin check:

1. That everyone is set up on a Team
2. That your Team Hours are appropriately set

### How-To Set Up to Receive Chats

1. Click your name in the upper right-hand corner, then choose "Profile"
2. Upload a photo and save changes
3. Install the **Chrome Extension**
4. Refresh page
5. Flip to the "Chat" screen
6. Make sure you're set to **Available**

### Best Practice

It might seem like a simple step, but adding that profile picture **helps customers feel like they're talking to a real-live person**!

They'll be more likely to chat with you, and **less likely to bounce** from your site!



## CHECK YOUR KNOWLEDGE

It's time to check your knowledge to see how you're doing!

1. To log into Conversations, head to...
   - a. conversations.dealerinspire.com
   - b. di.conversations.com
   - c. dealerinspire-conversations.com
   - d. conversations.com
2. If you want to receive incoming chats, you need to be...
   - a. set to Away
   - b. in Account Admin
   - c. on the Chat screen
   - d. logged out of Conversations
3. Which status will block all customer chats but allows internal chats and transfers?
   - a. Available
   - b. Away
   - c. Do Not Disturb
   - d. Offline

## REVIEW

What we covered in this section:

**Getting Started**

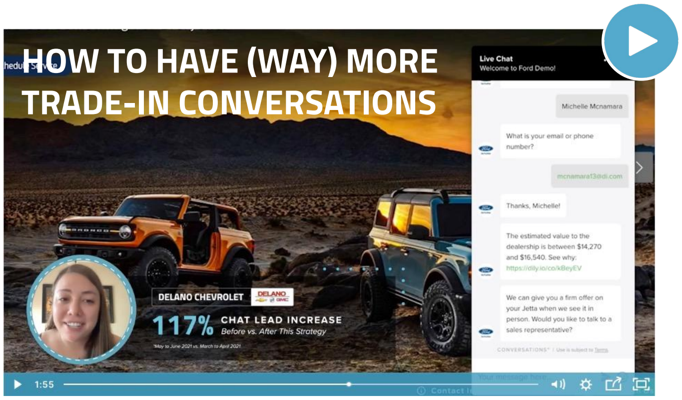
- **Logging in to Conversations**
- **Profile Set Up**
- **Setting up to Receive Chats**

Check your answers at the bottom of the page... how'd you do?

*"I got them all right!"*
🟢 Move on to the next section

*"I missed one."*
🟡 It might be good to review what you missed

*"I missed at least two, if not all of them."*
🔴 Review the content linked above



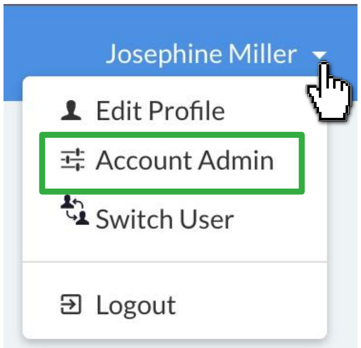

Answers: 1-A, 2-C, 3-B

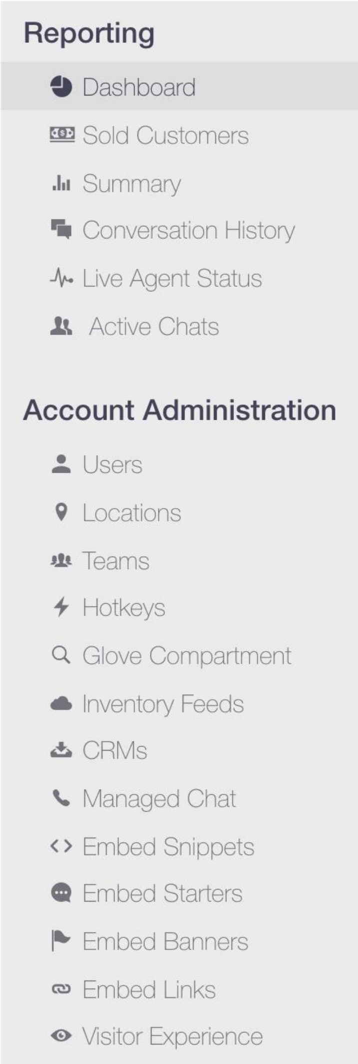
# Reporting: Overview

Josephine can answer chats from the Chat Screen, but if Josephine is looking to make edits or access reporting, she will need to switch to Account Admin. From here, she has a lot of reporting, edits, and customizations to work with.

When you first login to Conversations, it will take you to your Chat screen. To toggle to the Account Admin side of Conversations:

Click your **name** in the top right corner > **Account Admin**




Once in Account Admin, you will see the following tabs listed on the left, broken down by Reporting and Account Administration:

**Reporting**

- Dashboard
- Sold Customers
- Summary
- Conversation History
- Live Agent Status
- Active Chats

**Account Administration**

- Users
- Locations
- Teams
- Hotkeys
- Glove Compartment
- Inventory Feeds
- CRMs
- Managed Chat
- Embed Snippets
- Embed Starters
- Embed Banners
- Embed Links
- Visitor Experience

**Best Practice**

⚠️ Remember that **you will not receive chats unless you are in the Chat Screen**.

So if you flip to Account Admin or Edit Profile, make sure to flip back to Chat if you want to receive chats!

ADMIN

# Reporting: Dashboard

To start off, Josephine will see a high-level overview of all of her associated dealership within the Dashboard. She can dive deeper into a specific location, or view trends across her dealerships.

In the Dashboard, you will see a high-level summary of chats for your dealership, rolling for the last 24 hours.


**Hover your cursor over the graph to get more information about the number of chats by hour.**

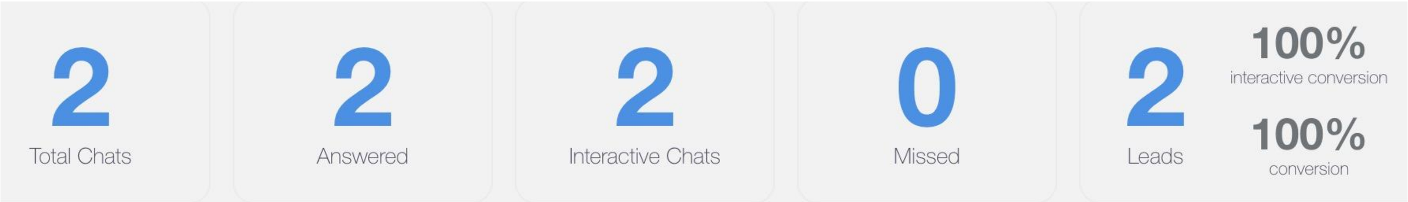
**Multiple locations will show up here if you are associated with more than one dealership. Click "View Dashboard" to drill down to view the dashboard for that dealership.**

**See Percentage of Chats answered today, Average Conversation Length, and Average Visitor Wait Time**

ADMIN

# Reporting: Dashboard

At the top of the Dashboard, you will see Total Chats, Answered Chats, Interactive Chats, Missed Chats, and Leads (broken into interactive Conversions and Conversions).



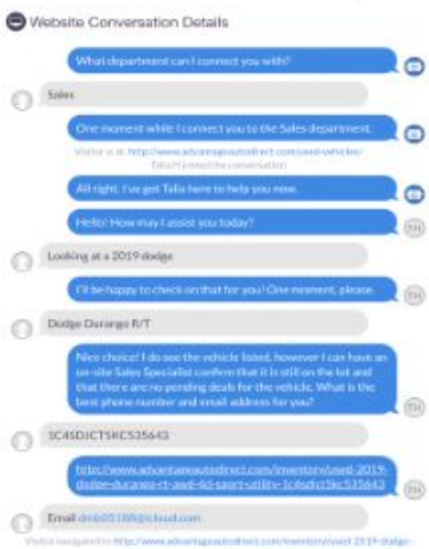

## What is an Interactive Chat?

An Interactive Chat occurs when a visitor has sent at least one message to an Agent after escalation.

An escalation happens when the visitor is passed to an agent. Some clients have managed chat, some don't. This is when the chat is handed off to a real person. (Dealership Agent or Managed Chat Agent)

**Non-Interactive Chat Example**


**Interactive Chat Example**




## How we Calculate Conversion Rates

Lead Info Received / Total Connected Chats = Conversion Rate %
Lead Info Received / Total Interactive Chats = Interactive Conversion Rate %

This counts for any chats that have had responses from any visitor after the chat is picked up by a dealership or managed chat agent, or escalated from AnaBot.

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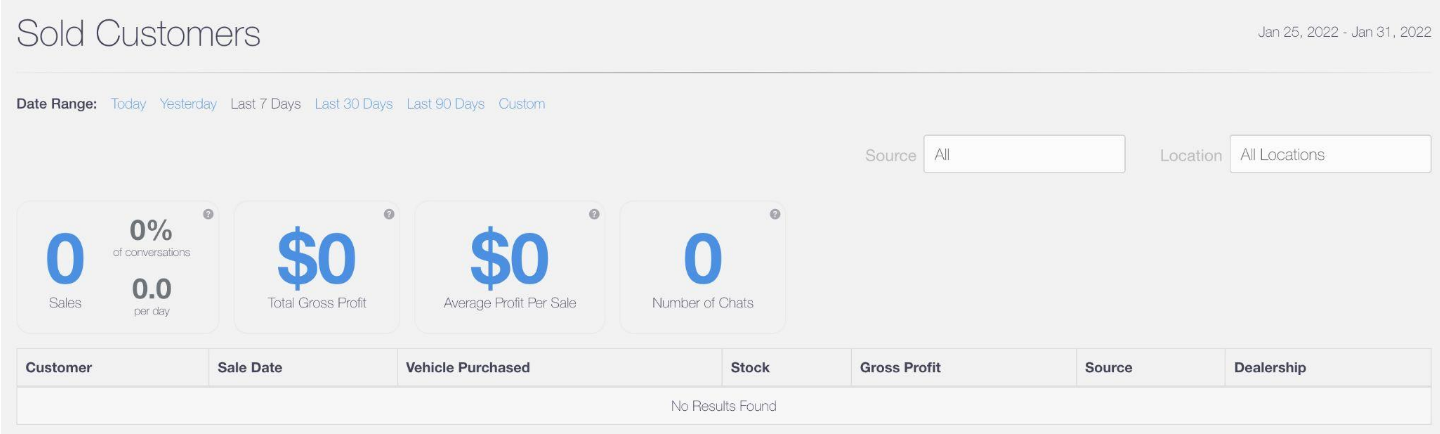
# Reporting: Sold Customers

Josephine can connect her dealership's DMS to see how leads are being converted into sales in the Sold Customers tab.

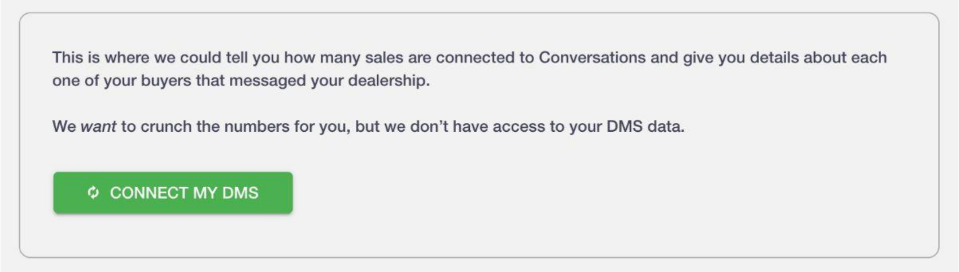
The Sold Customers tab will show you an overview of your leads and how those are converting to actual sales. This will populate if you have your DMS (dealer management system) connected.

On this screen, you can:

1. Select your date range (Today, Yesterday, Last 7 Days, Last 30 Days, Last 90 Days, or Custom)
2. Sort by Source and Locations




🚩 Note, if you do not have your DMS connected, you will see a green button that says **Connect my DMS**. Reach out to your Performance Manager to help you get this connected.





# Reporting: Summary

Much like the Dashboard, the Summary will provide Josephine with a specific dealership's overview of everything from total chats all the way to leads. From here she can even view how different teams and agents are performing.

Here you'll see:

- **Total Chats**
- **Answered Chats**
- **Interactive Chats**
- **Missed Chats** - a chat that has not been picked up after 7 seconds and the customer closes the chat
- **Leads**
  - Interactive Conversion %
  - Conversion %
  - Leads per Day

You can even sort by Team and Location!

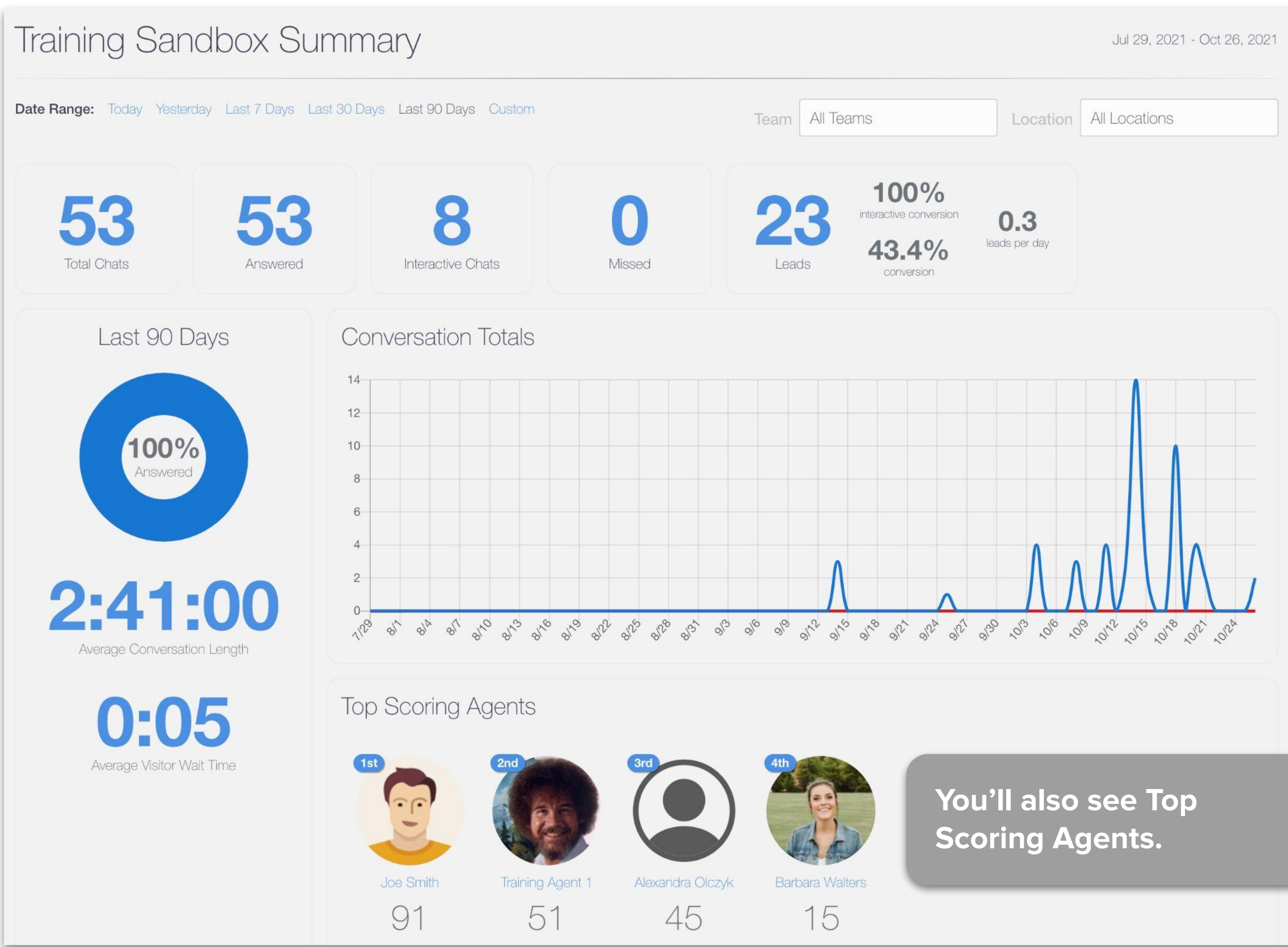
ADMIN

# Reporting: Summary

### How are Agent Scores Calculated?

For your selected date range, you will see Agent scores.

| | |
|---|---|
| **10 points** | • Appointment - agent message has the word ‘appointment’ in it<br>• Contact information received |
| **5 points** | • Visitor message received - points every time a visitor responds |
| **1 point** | • For Attachments - sent any item from the Glove Compartment |




You’ll also see Top Scoring Agents.

ADMIN

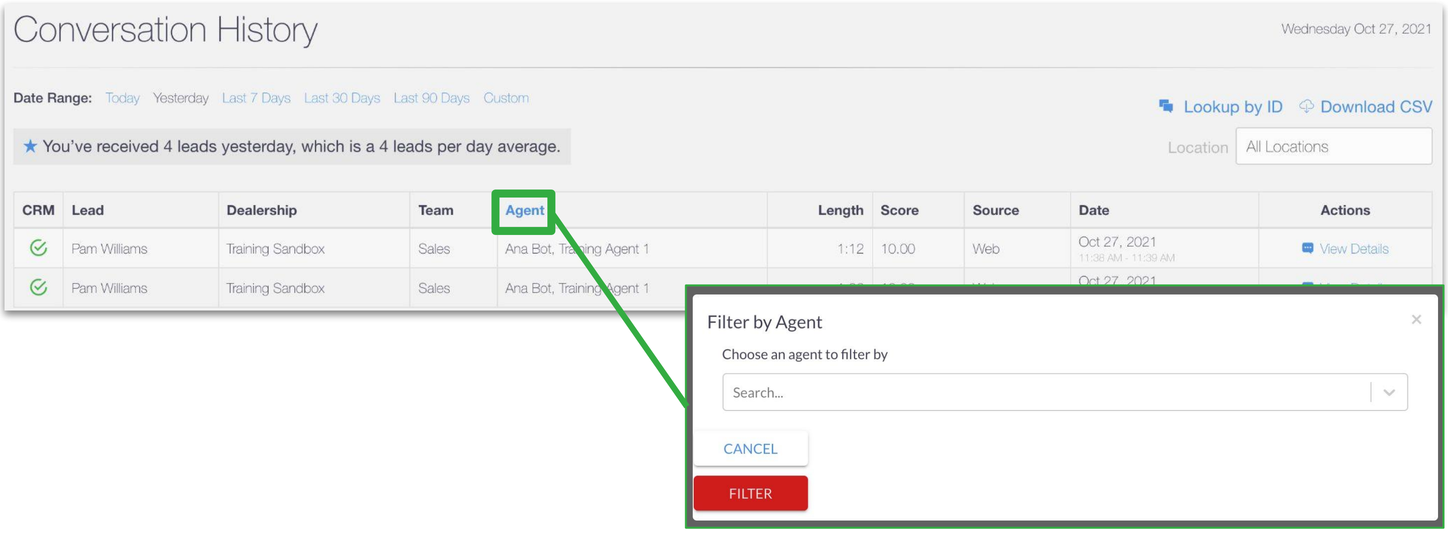
# Reporting: Conversations History

Josephine needs to review a Conversation that one of her Agents had last week. She has the ability to review chat transcripts from Conversations History. She can even export this data for her own records if need be.

Conversation History allows you to review chats that have already ended.

## Conversation History Functionality

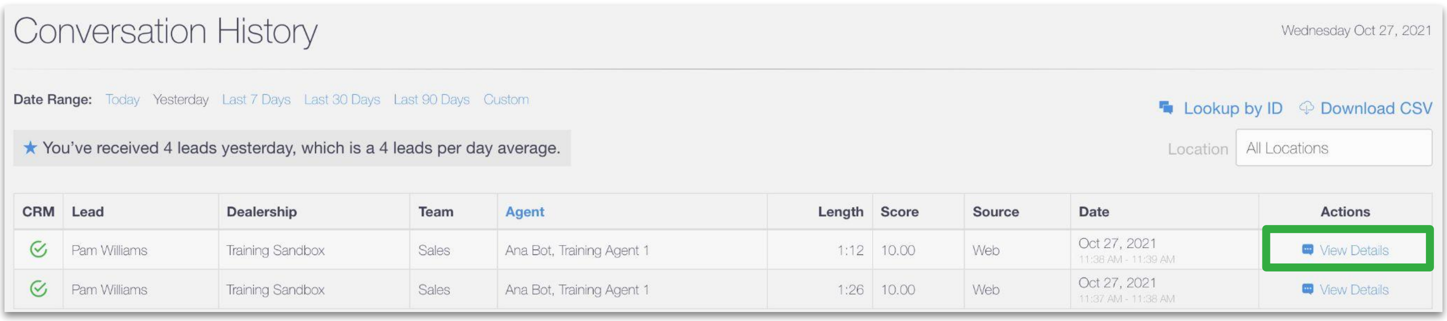
- You can sort by a specific date range
  - Today
  - Yesterday
  - Last 7 Days
  - Last 30 Days
  - Last 90 Days
  - Custom
- ★ You will also see the number of leads you've received and the average leads per day
- Lookup a Conversation by the ID
- Download the data CSV
- Lookup chats by Location
- Sort by Agent
  - Click Agent
  - Search for a specific Agent name
  - Click Filter
  - If no chats exist for that user, it will return, "No Results Found"
- Click View Details to review the chat
  - We'll go into more detail on the next page





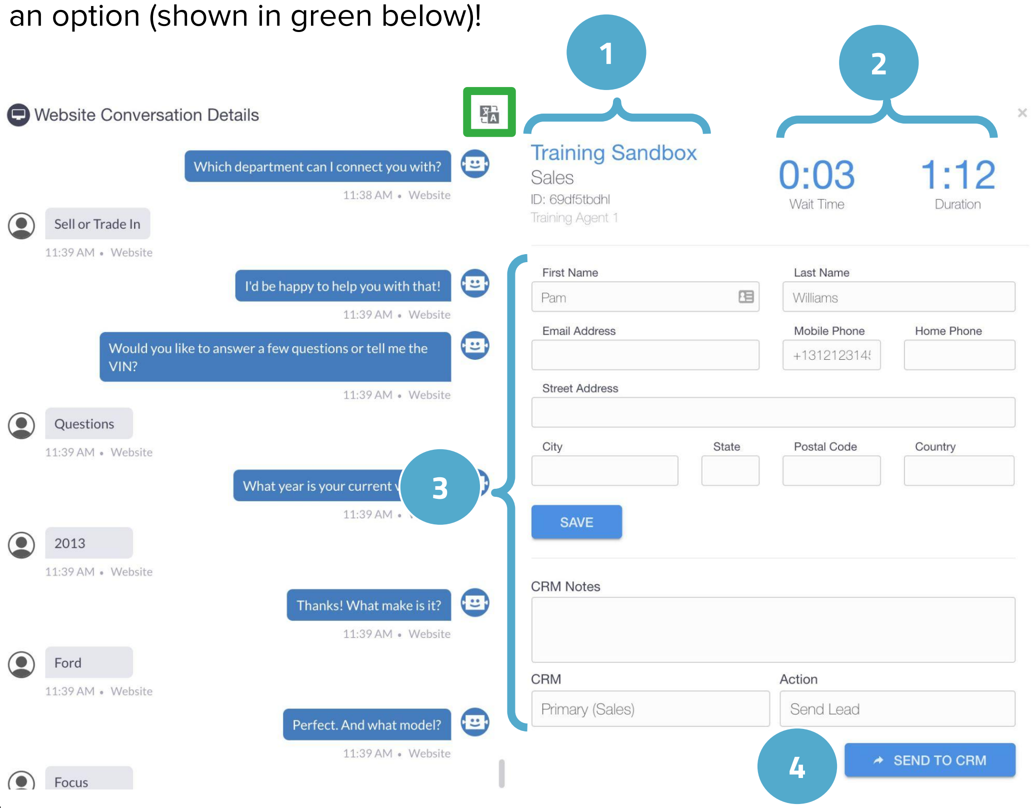
# Reporting: Conversations History

To review a chat's history, click **View Details**




| CRM | Lead | Dealership | Team | Agent | Length | Score | Source | Date | Actions |
|---|---|---|---|---|---|---|---|---|---|
| ✓ | Pam Williams | Training Sandbox | Sales | Ana Bot, Training Agent 1 | 1:12 | 10.00 | Web | Oct 27, 2021<br>11:38 AM - 11:39 AM | View Details |
| ✓ | Pam Williams | Training Sandbox | Sales | Ana Bot, Training Agent 1 | 1:26 | 10.00 | Web | Oct 27, 2021<br>11:37 AM - 11:38 AM | View Details |

You can review the entire Conversation with that customer from this screen. Notice that In-Chat Translation is an option (shown in green below)!




You will see the...

1. Website, Team Name, Conversation ID #, Agent
2. Wait Time and Duration of the chat
3. The Lead Form (which can be changed / updated)
4. An Option to Send to the CRM


# Reporting: Live Agent Status

Josephine wants to check to see which of her team is currently online, and who is in an active chat. She can do this in the Live Agent Status tab. This way she can keep tabs on how her team is performing, and ensure that the right people are answering chats.

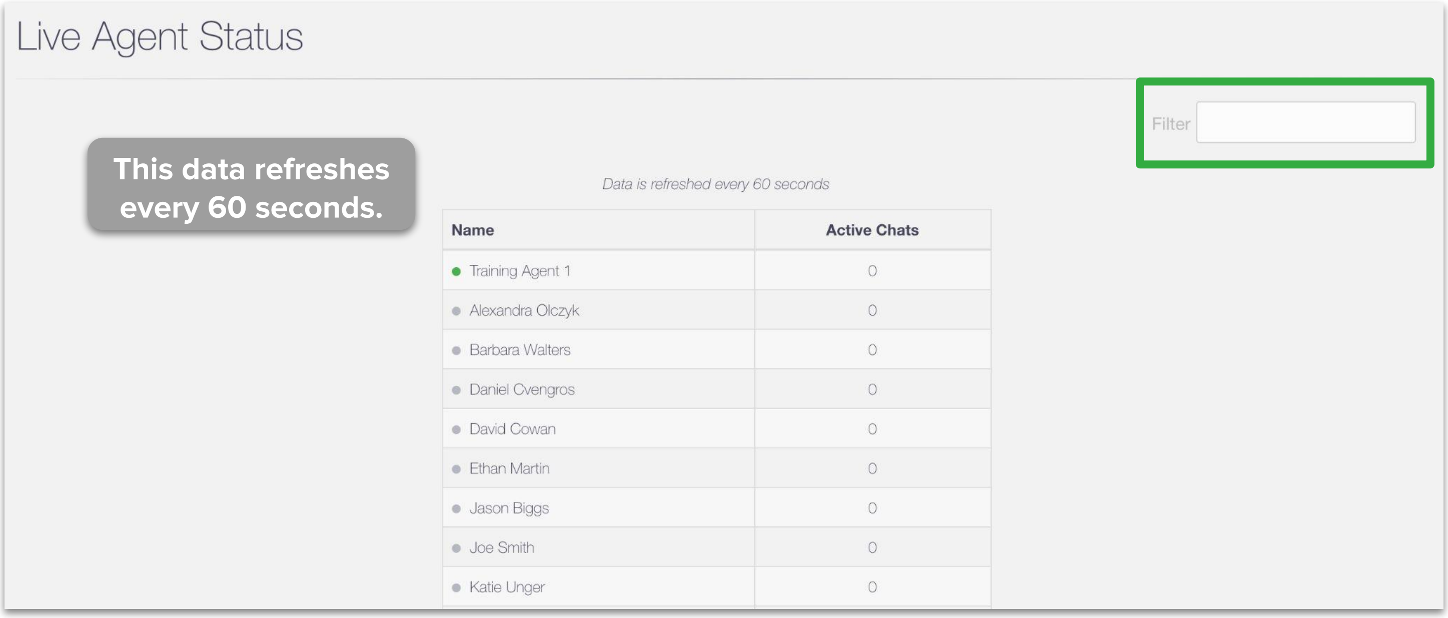
Within the Live Agent Status tab, you can view all Agents associated with your dealership. You will be able to see who is:

- **Available**
- **Away**
- **Do Not Disturb**
- **Offline**

**Best Practice**

If a coworker says they're not receiving chats, check here to see if they're set to Available!

This screen also provides you with the ability to filter by Agent by typing in the box below, and you can see the number of active chats that each Agent is currently in.




| Name | Active Chats |
|---|---|
| Training Agent 1 | 0 |
| Alexandra Olczyk | 0 |
| Barbara Walters | 0 |
| Daniel Ovengros | 0 |
| David Cowan | 0 |
| Ethan Martin | 0 |
| Jason Biggs | 0 |
| Joe Smith | 0 |
| Katie Unger | 0 |

ADMIN

# Reporting: Active Chats

She noticed that one of her Agents is currently in three different chats. She spoke to that Agent and they mentioned that they could use a hand. Josephine can go into Active Chats and take over that chat from the Agent by using Boss Mode.

Active Chats will show you all of the chats that are currently happening on your site, or on any site in your group.

You can sort by location by clicking in the box that says **All** in the top right corner.

For each active chat, you will see the:

1. dealership name
2. name of the customer (if no name has been added to the lead form, it will say Unknown)
3. total Chat Time
4. source of the conversation
5. option to View Chat Details

Active Chats

Location: All

| 1 Dealership | 2 Name | 3 Chat Time | 4 Source | 5 View Chat |
|---|---|---|---|---|
| Chevy Canada Demo | Byrson Schwab | 70:08:24 | Sms | View Details |
| Chevy Canada Demo | John smith | 70:13:00 | Sms | View Details |
| Hyundai Demo | Todd DealerInspire | 73:22:19 | Web | View Details |
| Honda Demo | Unknown | 92:25:31 | Web | View Details |
| VW Canada | JC SMP | 139:20:19 | Sms | View Details |
| VW Canada | Jennifer Orillia | 166:37:05 | Sms | View Details |

Clicking into View Details will allow you to see the conversation happening live on your site and will be where you can takeover the chat using Boss Mode.

We will go into Boss Mode in more detail on the next page.


# Reporting: Boss Mode

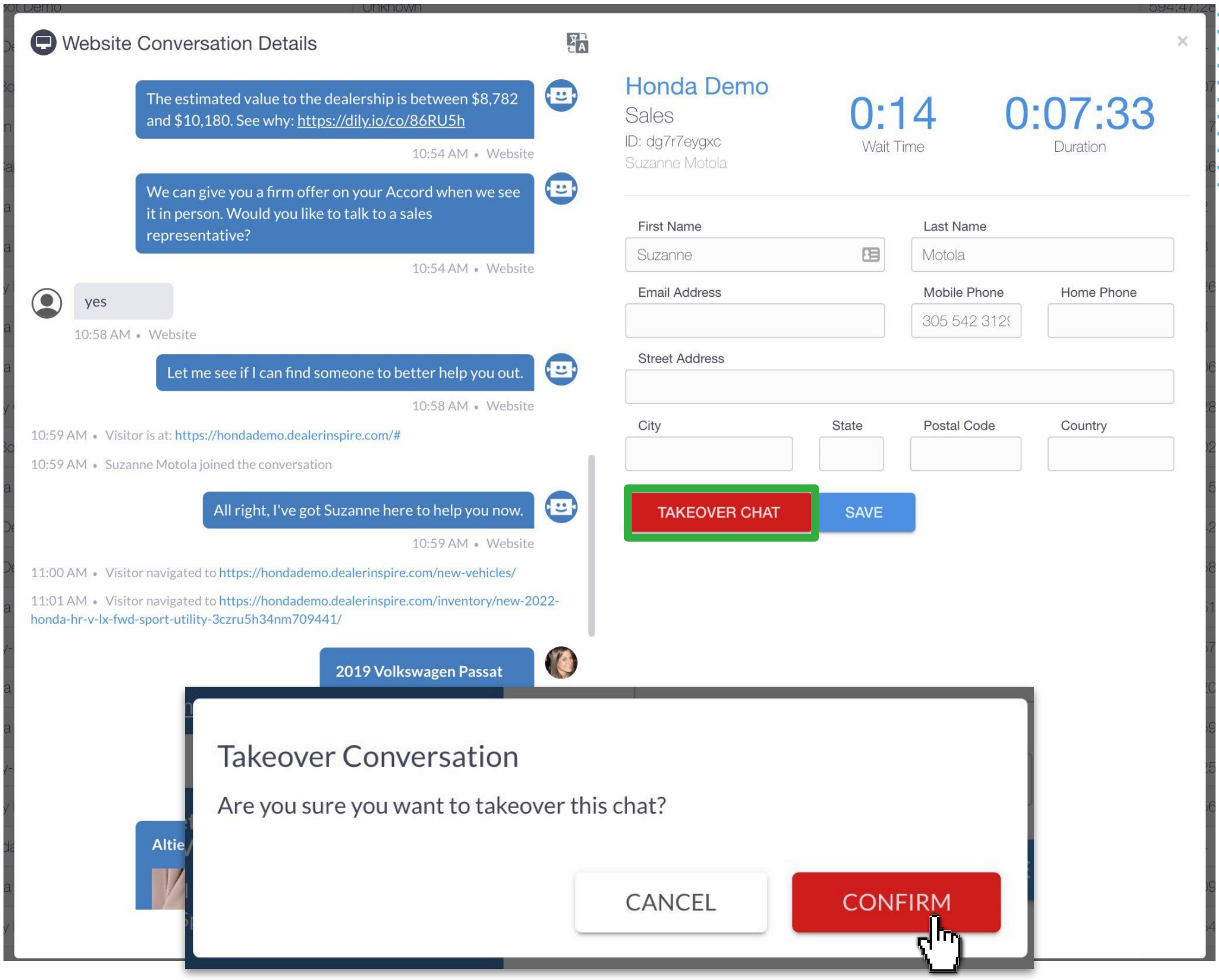
## Boss Mode

Boss Mode is the ability for Admins to take over chats that are happening on their site. Only Admins can take over Chats. Admins can take over for Agents at their dealership (internal) and Call Center Agents (external), but cannot take over for other Admins.

## How to Use Boss Mode


Click...

1. View Details
2. Takeover Chat
3. Confirm

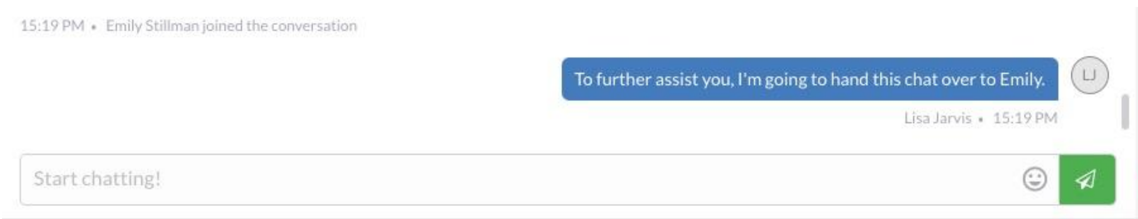


# Reporting: Boss Mode

### Taking over the Chat

Taking over a chat will automatically toggle you to the Chat screen where you are taken into the chat you just took over. There will be a message in the chat saying, *“[Your Name] joined the conversation”.*

Conversations will also automatically send a message from the other Agent saying, *“To further assist you, I’m going to hand this chat over to [Your Name]”.*




At this point, the other Agent can leave the chat by clicking on the **red X**.

### Other Things to Note

- Boss Mode works within Facebook as well

**Best Practice**

This is a great opportunity for a dealership admin to hop in and close a deal, confirm an appointment or even just secure that overall excellent experience.

We also know that someone might prefer specific details or have information that the call center may not, Boss Mode is a great way to let that admin user hop in and complete a chat the way they want to!

## CHECK YOUR KNOWLEDGE

It’s time to check your knowledge to see how you’re doing!

1. How do you flip to Account Admin?
   a. Your Name > Account Admin
   b. Your Name > Chat
   c. Your Name > Profile
   d. Status > Account Admin

2. Which section shows a *high-level* summary of chats for your dealership for the last 24 hours?
   a. Dashboard
   b. Sold Customers
   c. Conversations History
   d. Boss Mode

3. To view information in the Sold Customers tab, you need to have what connected?
   a. Your CRM
   b. Your Dealership’s YouTube Channel
   c. Your DMS
   d. Your Modern Retailing Solution

4. In Conversations History, how can you review a past conversation?
   a. Click Edit
   b. Click Export
   c. Click Review
   d. Click View Details

5. Where can you utilize Boss Mode?
   a. In Live Agent Status
   b. In Active Chats
   c. In Conversations History
   d. In the Dashboard

## REVIEW

What we covered in this section:

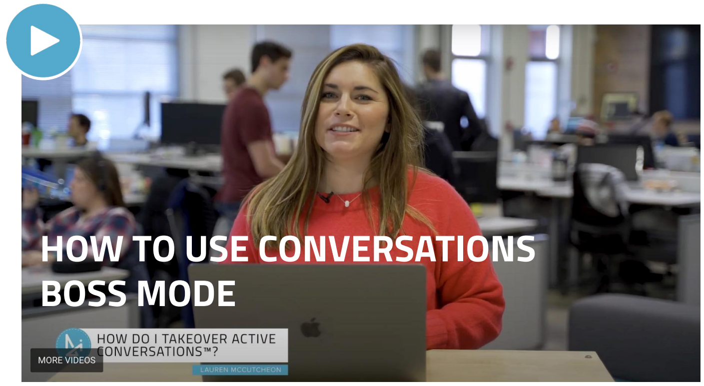
**Reporting**
- **Overview**
- **Dashboard**
- **Sold Customers**
- **Summary**
- **Conversations History**
- **Live Agent Status**
- **Active Chats**
- **Boss Mode**

Check your answers at the bottom of the page… how’d you do?

*“I got them all right!”*
🟢 Move on to the next section

*“I missed a few.”*
🟡 It might be good to review what you missed

*“I missed most, if not all of them.”*
🔴 Review the content linked above




Answers: 1-A, 2-A, 3-C, 4-D, 5-B



# Account Admin: Users

As an Admin, Josephine has the ability to add additional users to Conversations. She can even set those users to be additional Admins if need be.

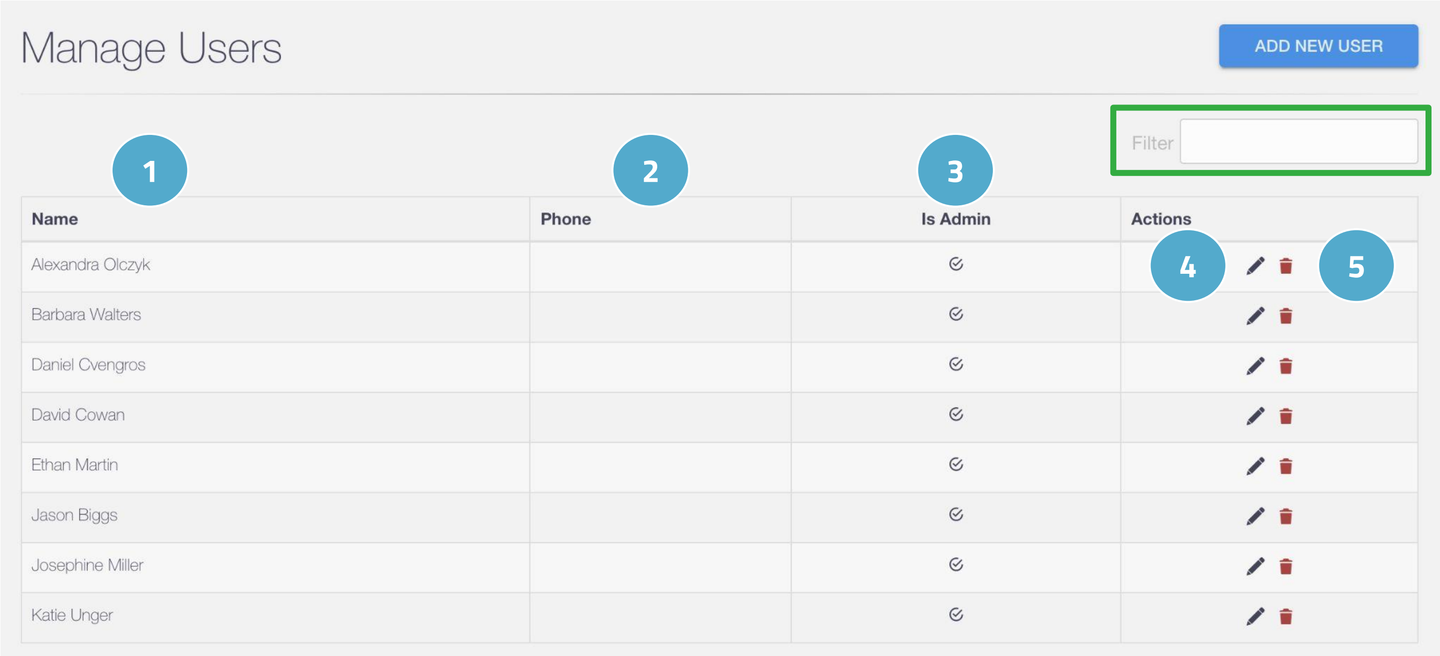
If someone leaves the dealership, she can easily remove users as well.

The Users tab will list all individuals that have a login for Conversations.

Here you will see:

1. The user's name
2. Their phone number (if they have one added)
3. A checkmark ☑ to denote if they are an Admin (if there is no checkmark, then they are an Agent)
4. The black pencil will allow you to edit a specific user
5. The red trash can will allow you to delete users

You also have the ability to search for a specific user using the Filter box



Manage Users

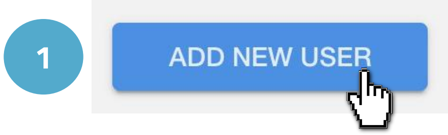
ADD NEW USER

Filter

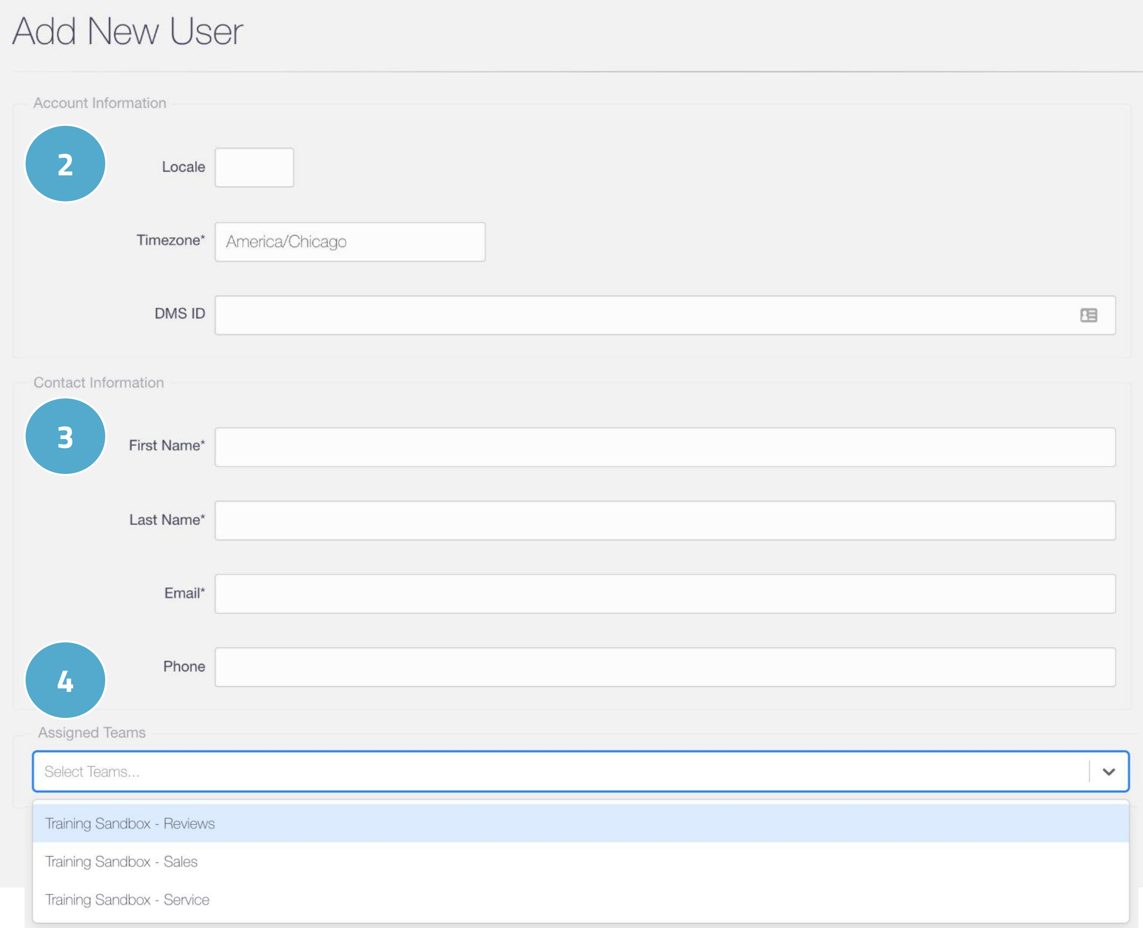
| Name | Phone | Is Admin | Actions |
|---|---|---|---|
| Alexandra Olczyk | | ✓ | ✎ 🗑 |
| Barbara Walters | | ✓ | ✎ 🗑 |
| Daniel Cvengros | | ✓ | ✎ 🗑 |
| David Cowan | | ✓ | ✎ 🗑 |
| Ethan Martin | | ✓ | ✎ 🗑 |
| Jason Biggs | | ✓ | ✎ 🗑 |
| Josephine Miller | | ✓ | ✎ 🗑 |
| Katie Unger | | ✓ | ✎ 🗑 |

# Account Admin: Users

## How to Create a New User



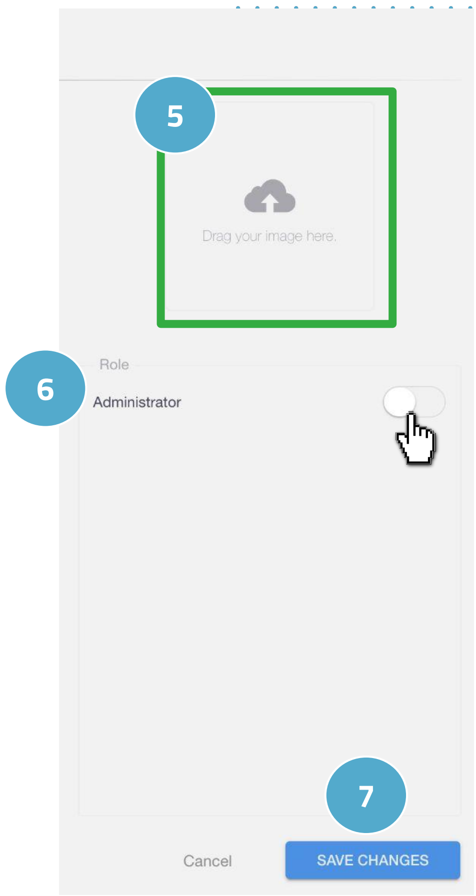

1. Click **Add New User**
2. Fill out the Account Information
   - **Locale** (English, French, Spanish)
   - **Timezone**
   - **DMS ID** - Depending on your CRM, this can potentially help Conversations leads get assigned to the agent who spoke with that customer. You may need to contact your CRM provider to get that set up properly.Fill out the Contact Information
   - First Name, Last Name, Email, Phone Number
3. Assign that user a Team by clicking in the box and selecting the appropriate team



# Account Admin: Users

From here, you only have a few more steps:

5. You can add a picture (or have the user do this themselves in their profile)
   - click in the gray box to upload a picture from your desktop
   - or drag and drop an image into the box
6. Click the toggle on if you'd like to make them an Admin
7. Click **Save Changes**




### How-To Add a User

1. Click Users
2. Select Add New
3. Fill out the first/last name and email
4. Assign Teams
5. Fill out any additional information you would like (like making them an Admin)
6. Click Save Changes

ADMIN

# Account Admin: Locations

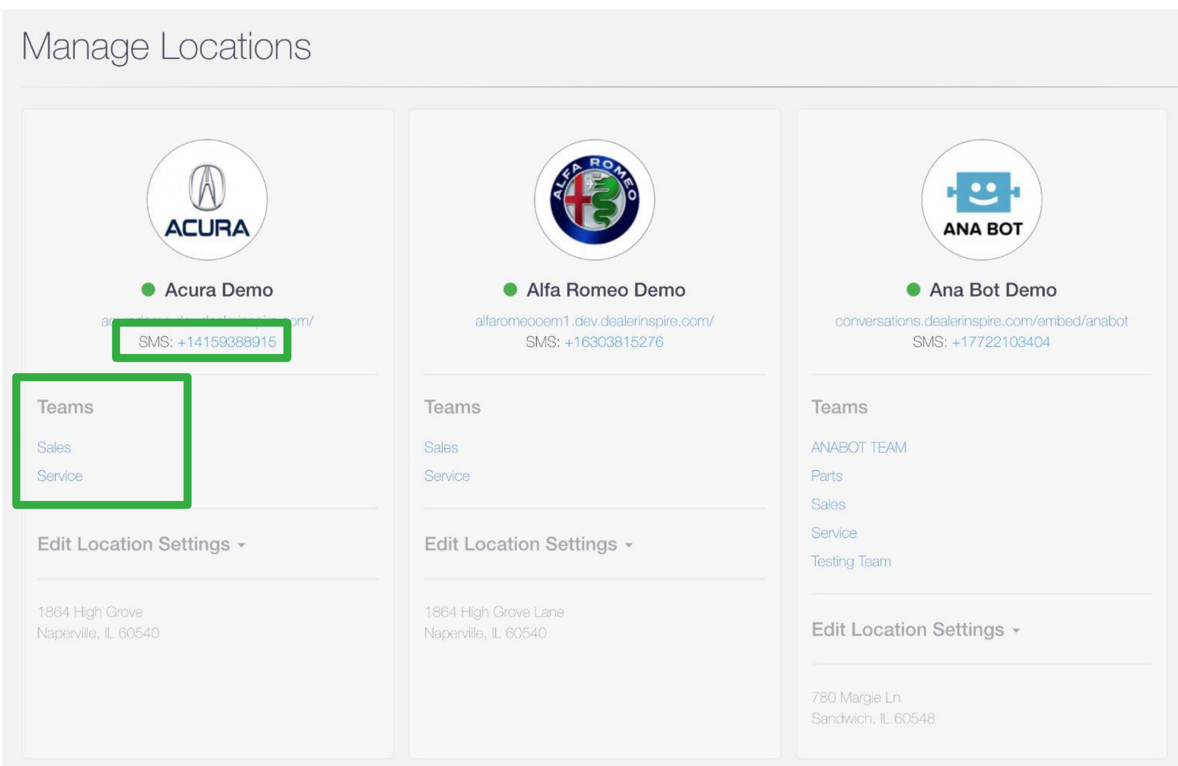
Josephine has multiple locations at her Dealership. To quickly manage and see details about each dealership, she can access that within the Locations tab.

If you have multiple locations, you can manage them all under the Locations tab.

Here, you can see the SMS number for each location and the teams that are assigned to that location.

If you share this SMS number with customers and they...

- call it → it will ring your dealership's main line
- text it → it will notify you in Conversations and start a new chat

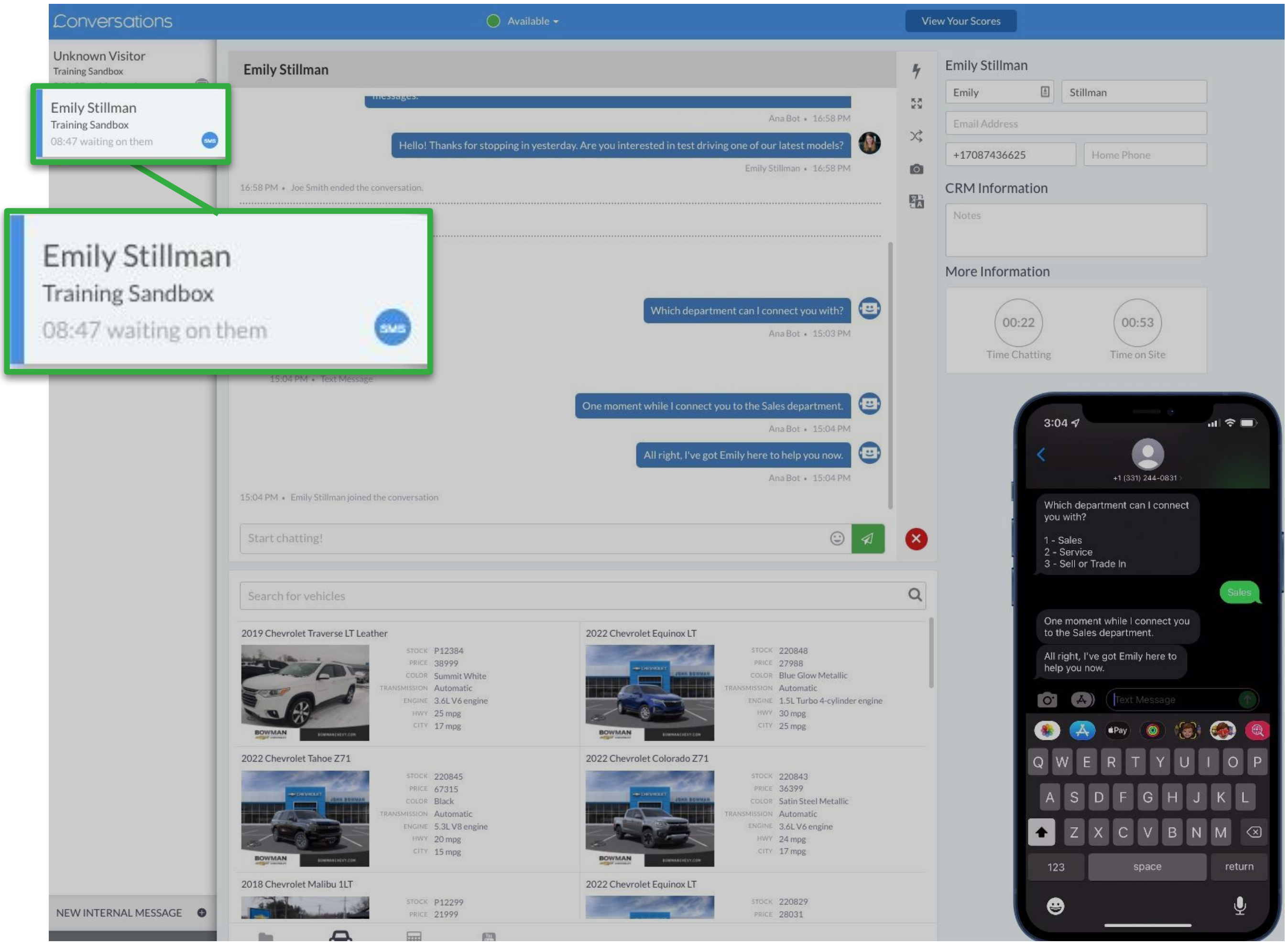



We'll go into more detail on the next page on what it looks like when a customer texts the SMS number listed for each location.

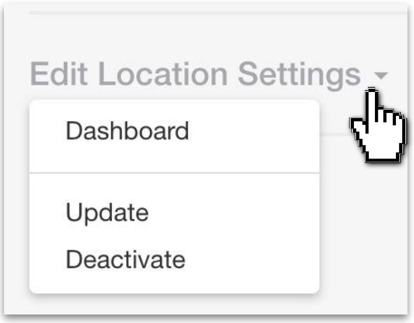
# Account Admin: Locations

## Sending a Text to the SMS Number

When the customer texts the SMS number listed in Locations, available Agents will be notified that a customer is looking to chat. The icon on the left hand side will also display an SMS rather than a desktop.




## Edit Location Settings

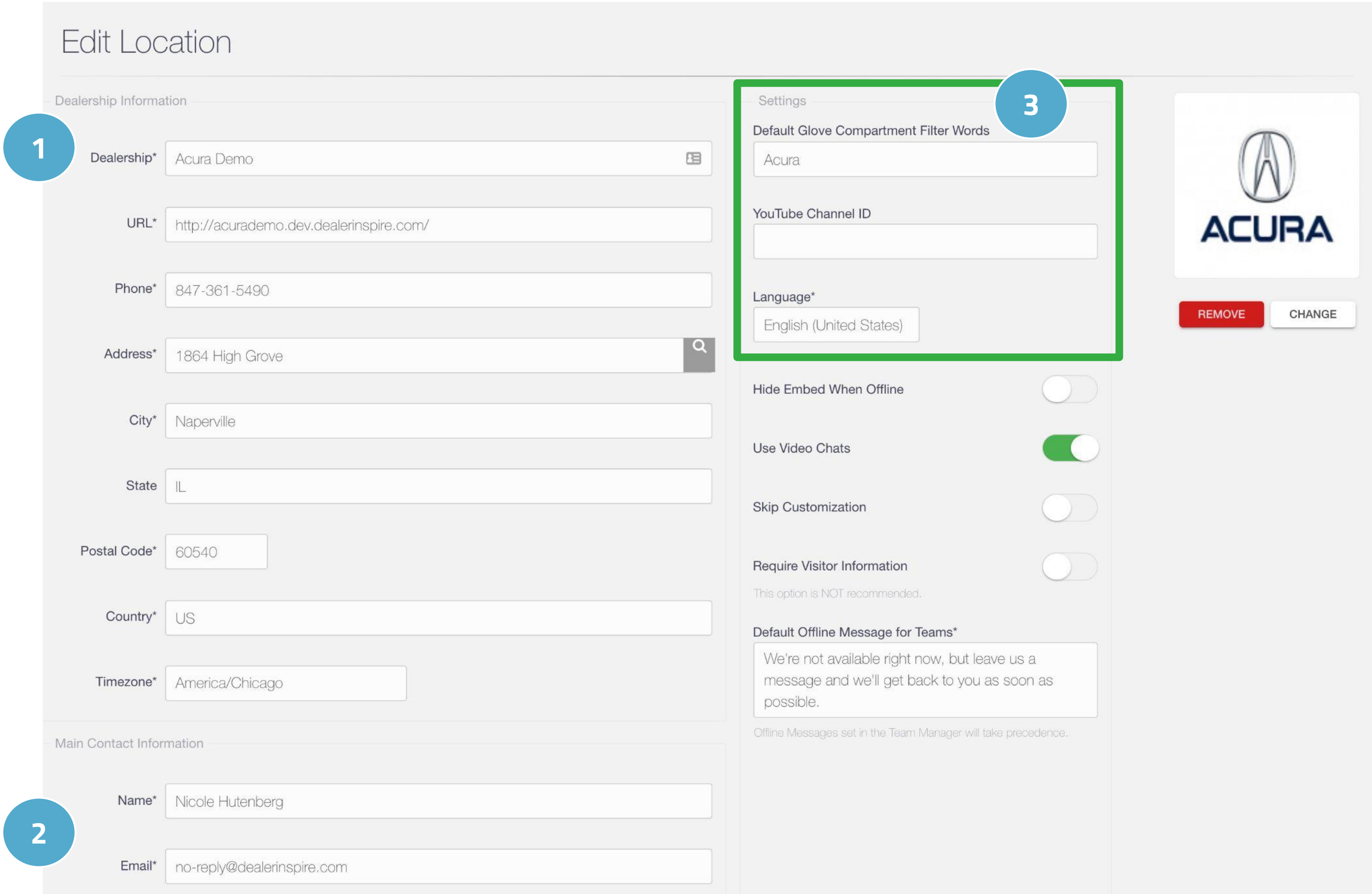



Click the dropdown arrow ▾ next to Edit Location Settings to access:

- the **Dashboard** for that specific location
- the option to update additional location settings
- the option to deactivate this location

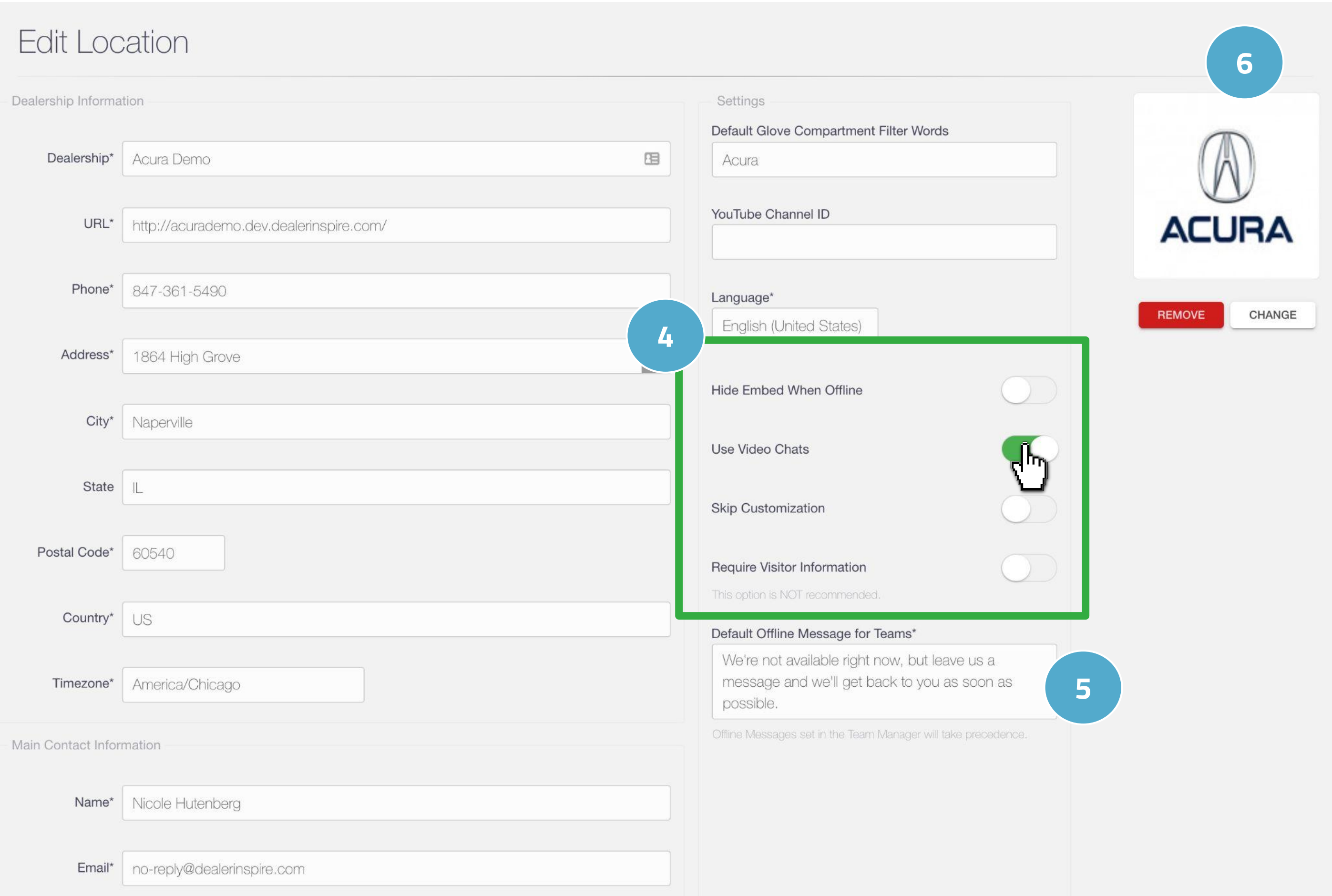


# Account Admin: Locations




1. After clicking the Update option, you can edit your dealership's:
   - name
   - URL
   - phone number
   - address
   - city
   - state
   - postal code
   - country
   - timezone
2. At the very bottom of the screen, you can update the Main Contact Information for that location, including Name and Email Address.
3. Under Settings, you can set:
   - **Default Glove Compartment Filter Words –** for your team to quickly find relevant files/resources in the Glove Compartment
   - **Youtube Channel ID** – if your dealership has a Youtube Channel (This will sync up with the Glove Compartment)
   - **Language** – set the default language for that location

# Account Admin: Locations



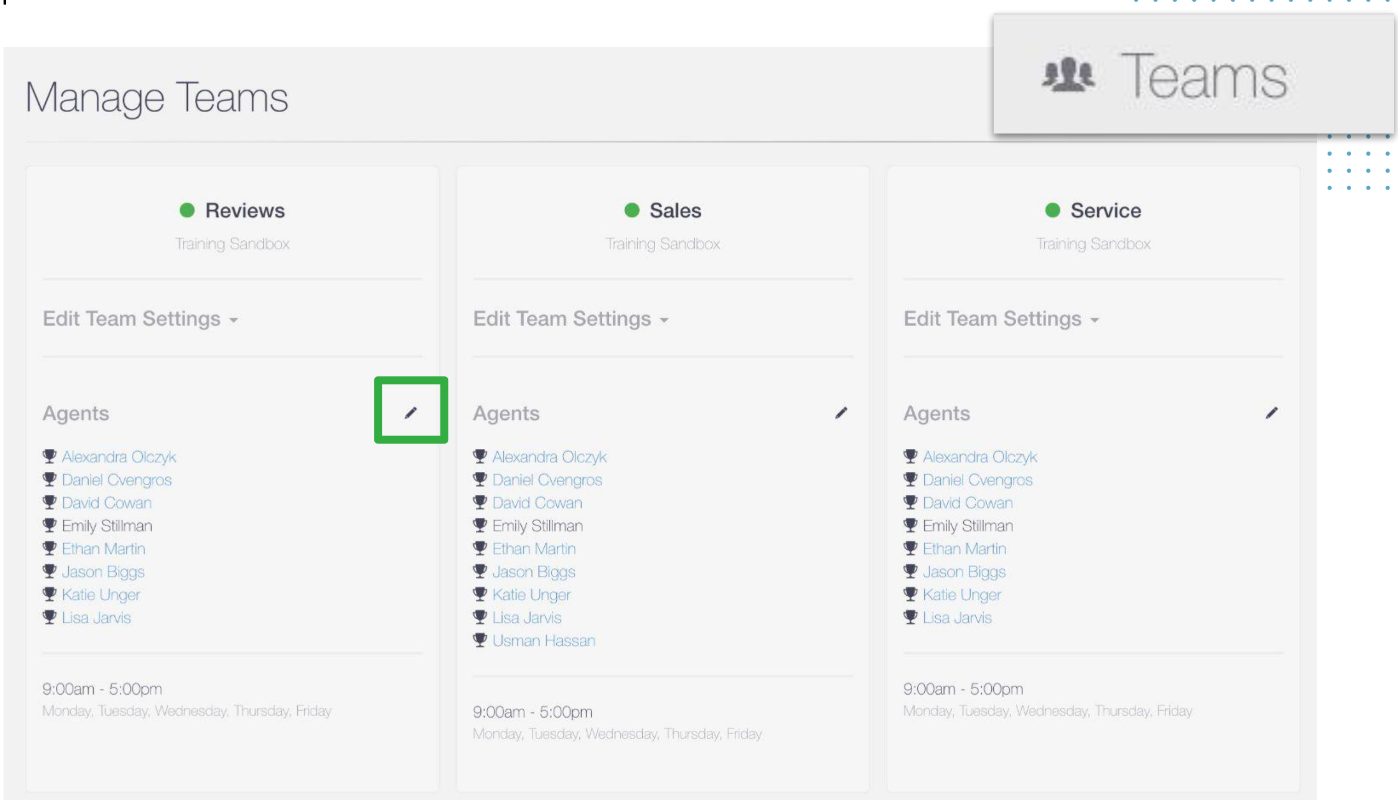

4. The toggle switches on the right side also allow you to adjust the following settings:
   - **Hide Embed When Offline** – this will hide the Conversations embed on your website if there is no one online to chat with a customer
   - **Use Video Chats** – this will allow you to determine if your agents will have the option to video chat with customers
   - **Skip Customization** – this will hide the lead form that appears to customers while they're waiting for an agent to answer their initial chat
   - **Require Visitor Information** – this requires customers to provide their contact information before they are connected with an agent (This option is NOT recommended, because it frequently causes customers to abandon the chat)
5. You also have the ability to set a **Default Offline Message for Teams**
6. On the far right, you can change/remove the image for that location



# Account Admin: Teams

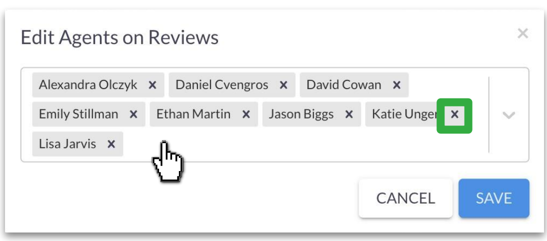
Josephine wants to set up a new team to reach out to customers after they've made a sale. To set up this new team, which she calls "The Review Team," she can do that from the Teams tab. She can even quickly add multiple users to this team without having to individually go into each user's information under the Users tab.

Here you can manage all of your teams and quickly assign individuals to a specific team or remove them from a team as well.




## How to Assign/Remove Multiple Users from Teams

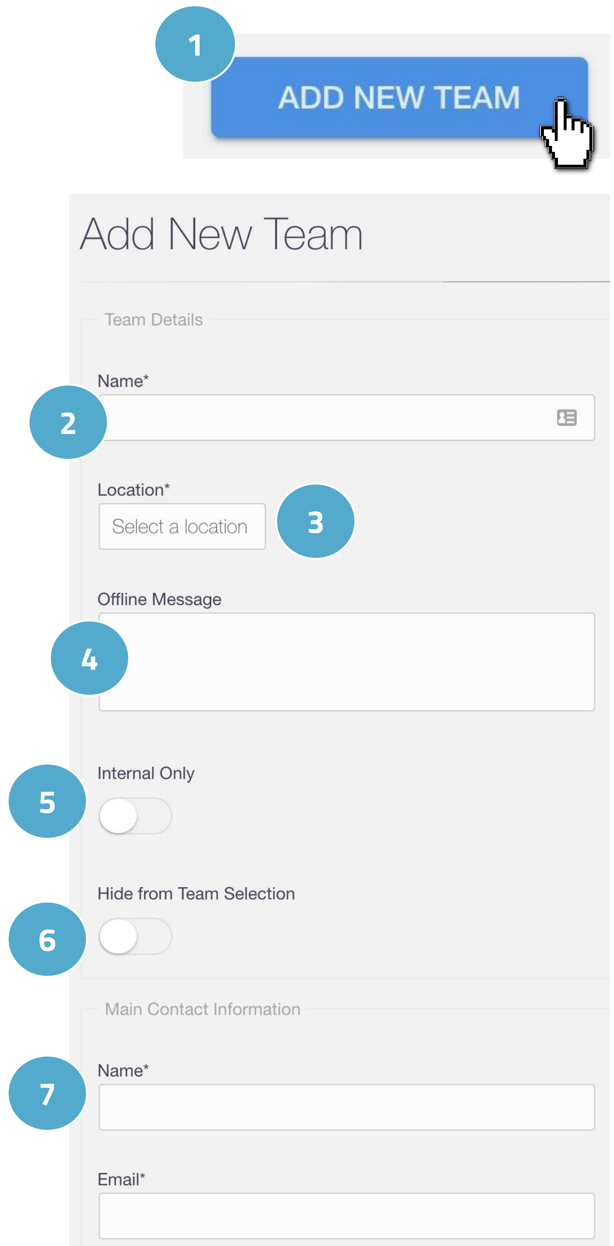
1. Click the Pencil Icon next to Agents for a given team
2. This will allow you to edit Agents on that team
3. Click into the box to get a dropdown menu of available Agents not on that team and select the Agents to add them to the team
4. To remove an Agent, click the X next to their name
5. Save any changes when you're done




# Account Admin: Teams

## How to Create a New Team

1. Click on **Add New Team**
2. Enter the **Name** (Team Name)
3. Choose the **Location** (Dealership Location)
4. Create an **Offline Message**
5. You can turn on the **Internal Only*** toggle switch
6. You can turn on the **Hide from Team Selection** toggle switch
7. Set the Main Contact Information - this is the person who will receive chat transcripts for this team
   a. List one or multiple names (separated by commas)
   b. List one or multiple emails (separated by commas)




If you do create a new team and would like to assign a CRM to your team to ensure that you receive your leads, please see our section on **CRMs**.

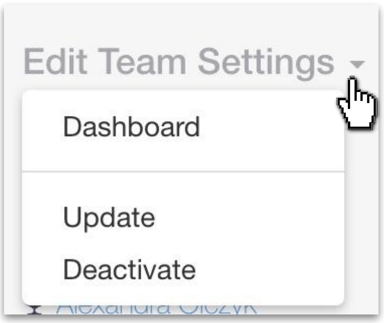
## *Internal Teams

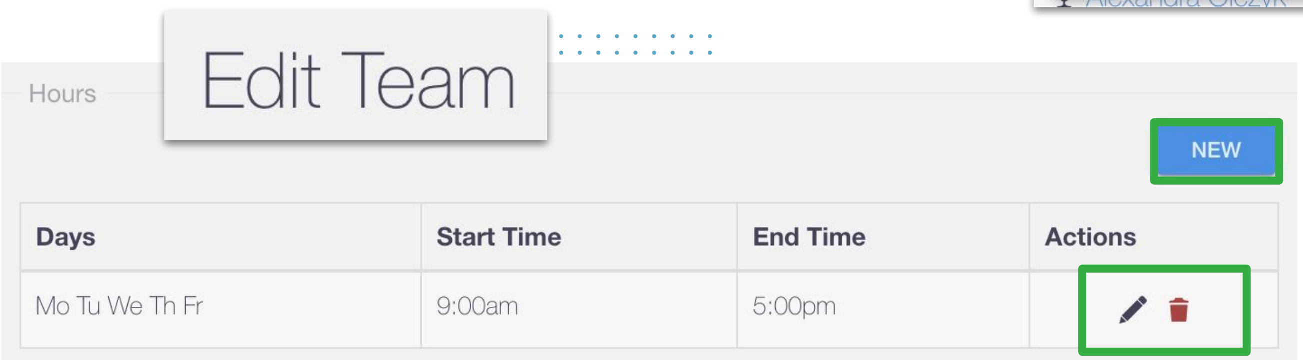
- These are teams that can be created within Conversations that are not visible to the customer
- Members of Internal Teams can use features such as Outbound SMS and have chats transferred to them, but will not be answering new incoming chats


# Account Admin: Teams

Clicking the dropdown arrow next to **Edit Team Settings** will show you a few options:

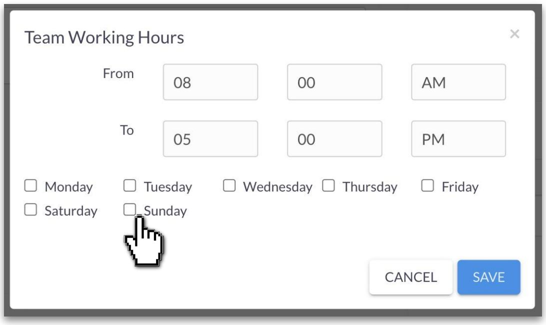
1. **Dashboard** - This will take you to the Dashboard for that Team
2. **Update** - Choose this to update things like Team Hours, Closed Dates, and everything included in the initial Team Setup shown on the previous page
3. **Deactivate** - Click to deactivate the Team




## Updating a Teams Hours

To access the team hours, click **Edit Team Settings**, then **Update**




**Hours** is where you will set the available hours for that team

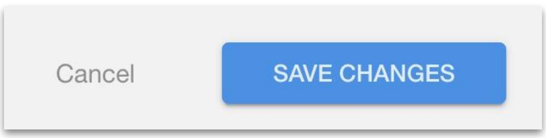
- Click **New** to add a new set of hours
  - Add your times and select your dates
  - Save your changes
- Click the pencil to edit an existing set of hours
  - Update your times and dates
  - Save your changes
- Click the trash can icon to delete an existing set of hours

**Best Practice**

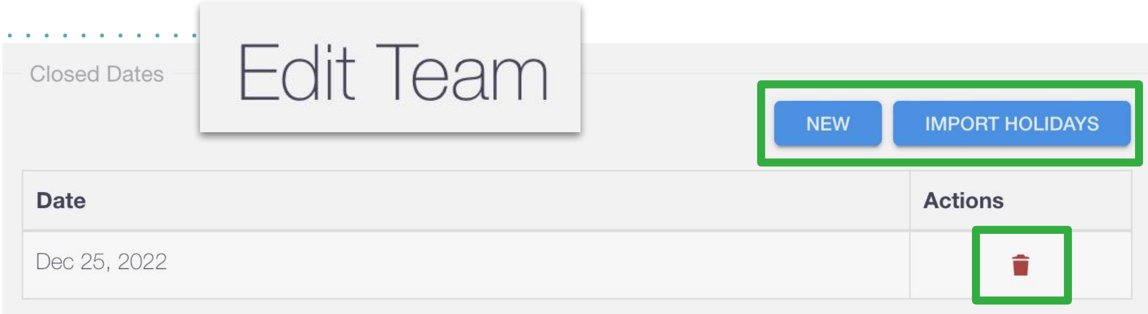
Setting Team Hours is very important in ensuring that your team is receiving chats!

Don't forget this step as part of your setup.

When you're done making edits to the Team's Hours, click **Save Changes**




# Account Admin: Teams

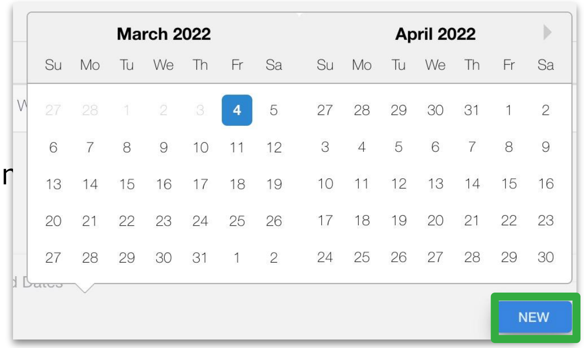



## Updating a Teams Closed Dates

To access the team hours, click **Edit Team Settings**, then **Update**

**Closed Dates** is where you can note any days where this team will not be available

- Click **New** to add these individually
  - A calendar will appear for you to select your individual closed dates
  - Then select **New**
- Click **Import Holidays** to select from a list of common holidays
  - This will display a list of holidays that you can select for your dealership
  - Scroll to the bottom of the window and click **Save** when you have all all of your holidays you want to import selected
- Click the trash can icon to delete an existing closed date



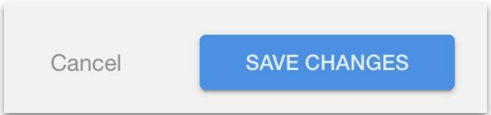


**Best Practice:**

If, for example, your dealership is closed every Sunday, you do not have to add a Closed Date for every Sunday!

Instead, simply do not set available hours for Sunday.

When you're done making edits to the Team's Closed Dates, click **Save Changes**



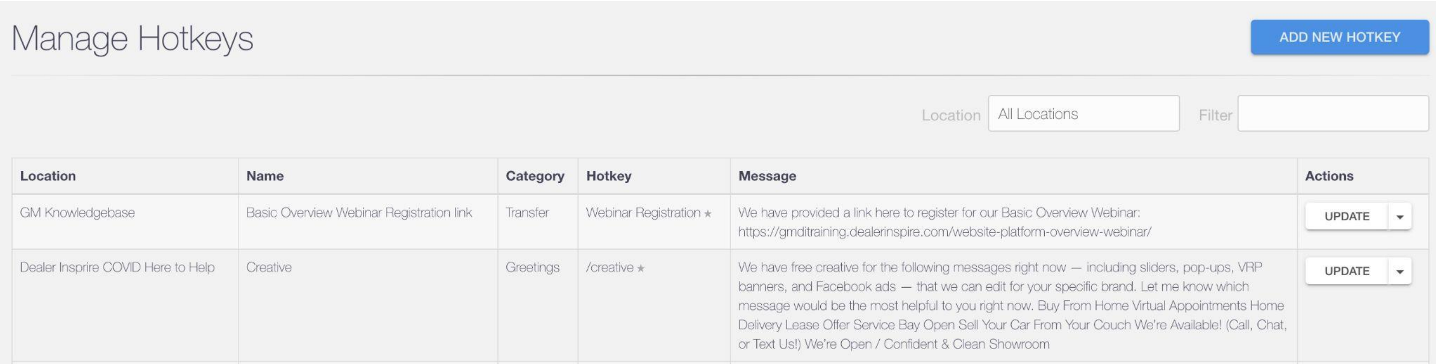

# Account Admin: Hotkeys

Josephine wants to make sure that her team is running efficiently and that customers are not bouncing from their site. She can set up Hotkeys (templated responses) for her team to use to keep chats moving smoothly, and to make sure the correct information is always shared with the customer!

## What are Hotkeys?

Hotkeys are templated responses for things that agents will be saying often.


Admins can create Hotkeys for their team and help create a cohesive experience for your customer, while allowing your team to answer chats effectively and efficiently!




| Location | Name | Category | Hotkey | Message | Actions |
|---|---|---|---|---|---|
| GM Knowledgebase | Basic Overview Webinar Registration link | Transfer | Webinar Registration ★ | We have provided a link here to register for our Basic Overview Webinar: https://gmditraining.dealerinspire.com/website-platform-overview-webinar/ | UPDATE |
| Dealer Inspire COVID Here to Help | Creative | Greetings | /creative ★ | We have free creative for the following messages right now — including sliders, pop-ups, VRP banners, and Facebook ads — that we can edit for your specific brand. Let me know which message would be the most helpful to you right now. Buy From Home Virtual Appointments Home Delivery Lease Offer Service Bay Open Sell Your Car From Your Couch We're Available! (Call, Chat, or Text Us!) We're Open / Confident & Clean Showroom | UPDATE |

Existing Hotkeys they will be listed in the table below, showing:

- **Location –** which dealership has access to this file
- **Name –** the brief description of your Hotkey
- **Category –** an assigned category like Sales/General
- **Hotkey –** the shortcode of your Hotkey
- **Message –** this is the content of your Hotkey, aka what is actually sent in the chat to the customer
- **Actions –** includes Update and Deactivate

*Note: A star ★ next to the Hotkey will denote that that Hotkey is a favorite.*

**Best Practice**

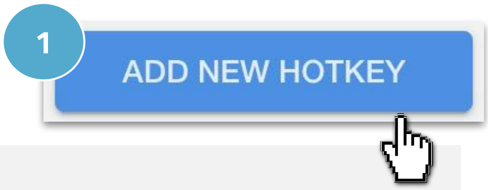
Work with your team to establish Hotkeys that work for everyone!

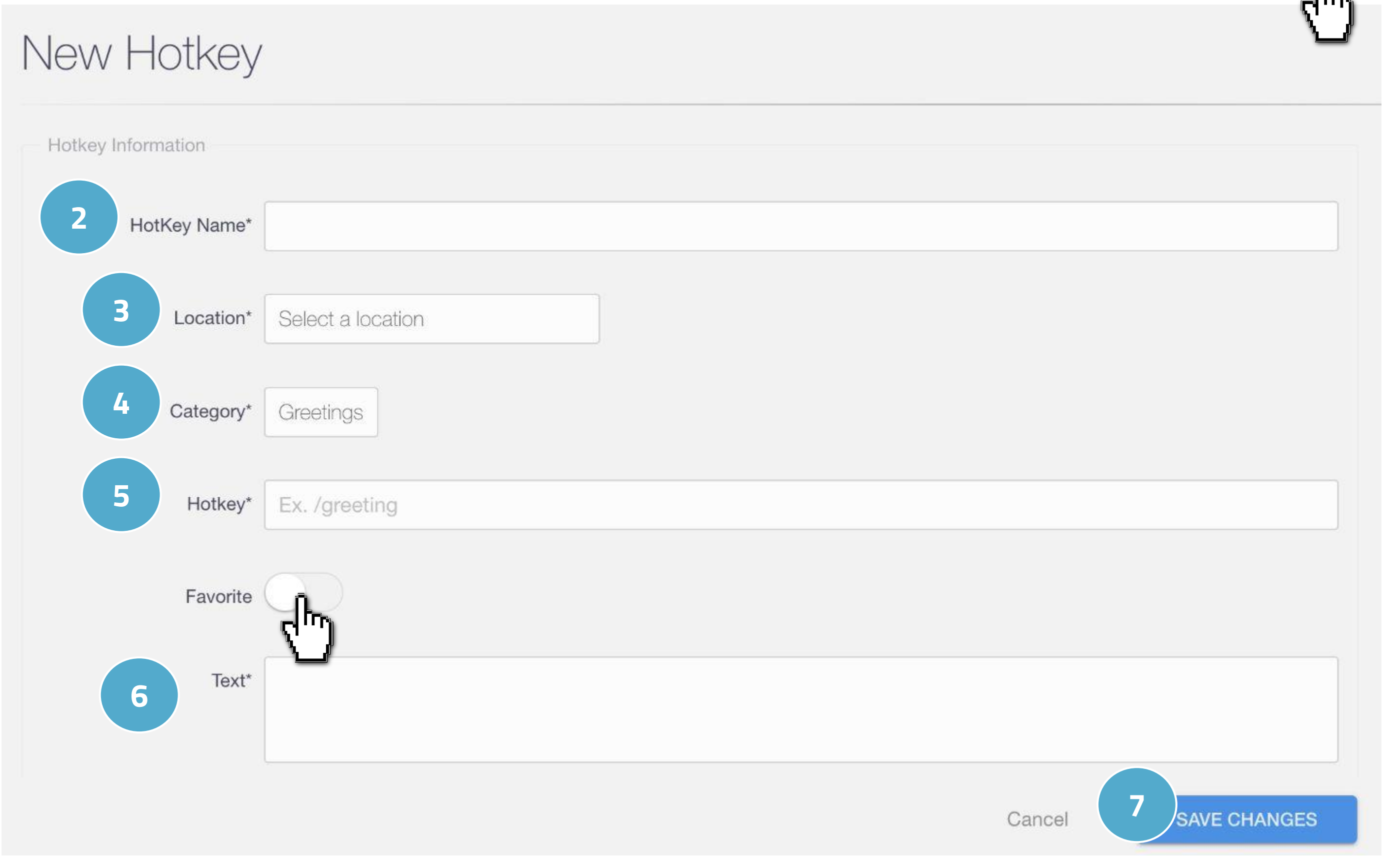
They're customizable for your team in order to make chats more effective, so make sure you're having that conversation!

# Account Admin: Hotkeys

## How to Create a Hotkey

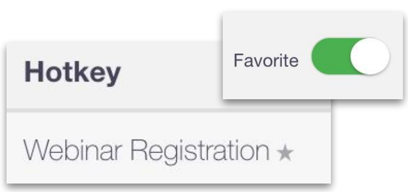
1. Click **Add New Hotkey**
2. Name your new Hotkey
3. Select your dealership location from the dropdown menu
4. Hotkeys can be organized into different categories. Select from the existing options, or add your own
5. In the Hotkey field, enter in the typing shortcut your Agents can send instead of searching through the list
6. Type in your desired message
7. Click **Save Changes**




You can toggle the Favorite on to signal to your team that this is a Hotkey that they should be using!

Favorited Hotkeys will be listed with a star ★ on the previous screen.




# Account Admin: Hotkeys

## What are Variables

Don’t be afraid to use the Variables listed to the right within your Hotkey.

This will pull the relevant information that matches the the Agent sending it, the dealership the Agent is sending from, or the location as well.

### Variables

The following variables can be placed in a hotkey and they will be replaced with the proper values upon use:

<<agentName>> First and last name of the agent

<<agentEmail>> Agent email address

<<agentPhoneNumber>> Agent phone number

<<dealershipName>> Dealership name with dealership group

<<locationName>> Dealership name only

<<dealershipPhoneNumber>> Dealership phone number

## How to Use Variables

Just copy and paste the red text from the Variables section

In our example, if Josephine were to send the Hotkey, Conversations would populate her relevant information.

Text* Hello! My name is <<agentName>> and you can reach me at <<agentPhoneNumber>>! I look forward to hearing from you.

Variables allow you to create a few Hotkeys that are applicable to multiple Agents, so you don’t need to create Hotkeys for each person!

## CHECK YOUR KNOWLEDGE

It's time to check your knowledge to see how you're doing!

1. Who can make a user an Admin?
   a. Another Admin
   b. Any Agent
   c. Only DI employees
   d. All of the above

2. Where do you input a dealership's YouTube channel ID?
   a. In Users
   b. In Locations
   c. In Teams
   d. In Hotkeys

3. If your dealership is closed every Sunday, how would you show this for your team?
   a. Select every Sunday as a Closed Date
   b. Update Team Hours to show that Sunday is off
   c. Create a separate Team for Sundays
   d. Push chats to another team for just Sunday

4. What is a Hotkey?
   a. A fast-selling car
   b. A file you can upload
   c. A type of user like Admin and Agent
   d. A templated response

5. What do variables do?
   a. Bulk deletes Hotkeys
   b. Removes the info. from a Hotkey
   c. Allows Agents to create their own Hotkeys
   d. Pulls in the relevant information within a Hotkey

## REVIEW

What we covered in this section:

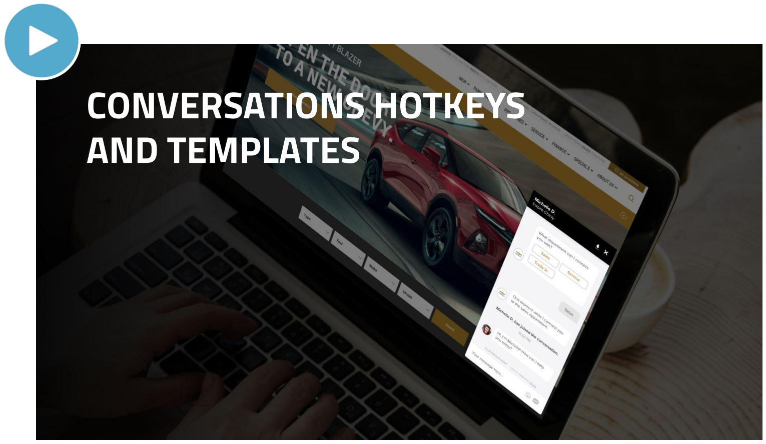
**Account Admin**
- **Users**
- **Locations**
- **Teams**
- **Hotkeys**

Check your answers at the bottom of the page… how'd you do?

*"I got them all right!"*
🟢 Move on to the next section

*"I missed a few."*
🟡 It might be good to review what you missed

*"I missed most, if not all of them."*
🔴 Review the content linked above




*Answers: 1-A, 2-B, 3-B, 4-D, 5-D*



# Account Admin: Glove Compartment

Josephine wants to set up some takeaways for her Agents to send to customers. Specifically, she wants to set up a flyer with their most recent incentive, and a video walkthrough that they made of their service bay. This can be uploaded to the Glove Compartment for Agents to send while chatting.

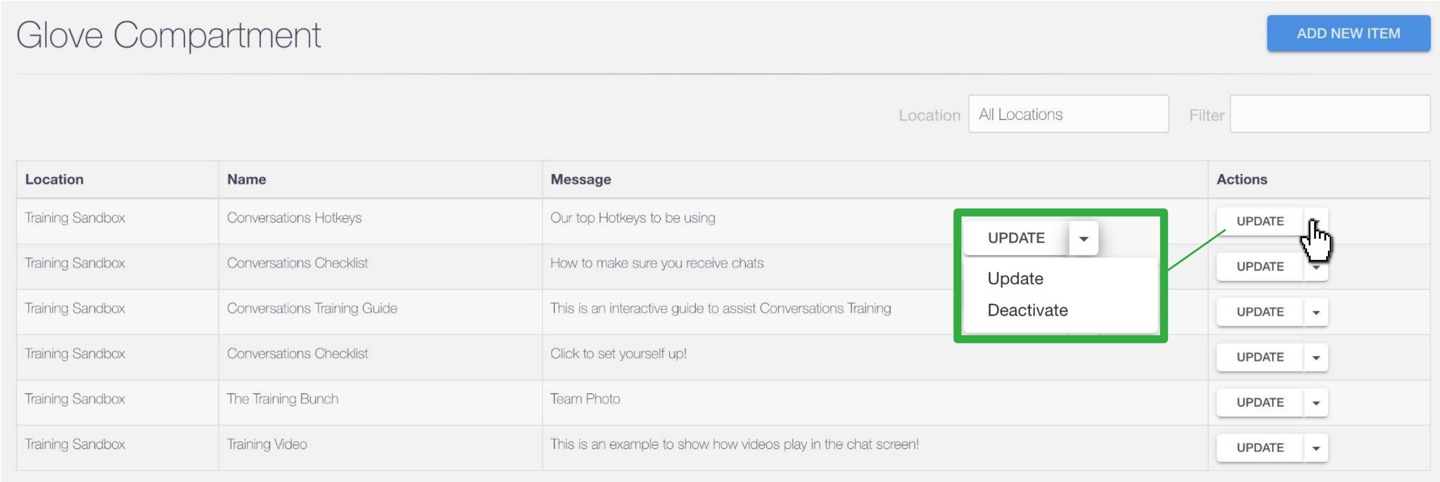
## What is the Glove Compartment?

The Glove Compartment is a staple of Conversations that allows users in a chat to drag and drop common elements of a chat such as vehicle information, promotion videos, lease information and other informations directly into the chat without having to open up other tools to find assets.

As an Admin, you can load the Glove Compartment with all of your best resources!

When you add resources to your Glove Compartment, they will be listed in the table below, showing:

- **Location –** which dealership has access to this file
- **Name –** name of the file
- **Message –** briefly describes what that file is
- **Actions –** includes Update and Deactivate



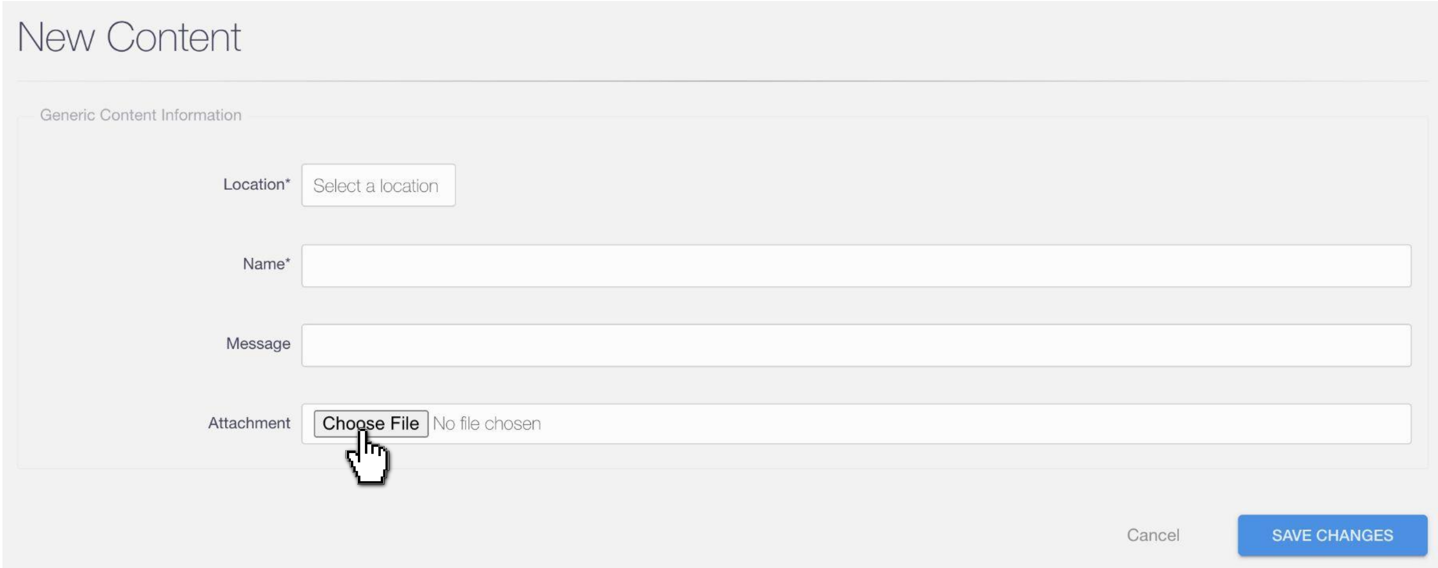

| Location | Name | Message | Actions |
|---|---|---|---|
| Training Sandbox | Conversations Hotkeys | Our top Hotkeys to be using | UPDATE |
| Training Sandbox | Conversations Checklist | How to make sure you receive chats | UPDATE |
| Training Sandbox | Conversations Training Guide | This is an interactive guide to assist Conversations Training | UPDATE |
| Training Sandbox | Conversations Checklist | Click to set yourself up! | UPDATE |
| Training Sandbox | The Training Bunch | Team Photo | UPDATE |
| Training Sandbox | Training Video | This is an example to show how videos play in the chat screen! | UPDATE |


# Account Admin: Glove Compartment

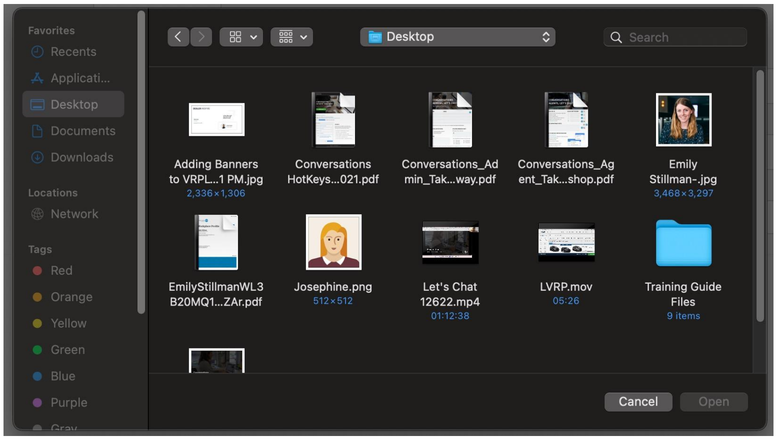
## How to Add to the Glove Compartment

As an Admin, you will need to upload items to the Glove Compartment for Agents to be able to send to customers. To do this:

1. Click **Add New Item**
2. Choose the **Location** - this is which dealership will have access to the file
3. Give your File a **Name**
4. Add a Brief **Message** to describe your file
5. Click **Choose File** to upload the Attachment


6. **Select a File** from your computer
7. **Save Changes**




### Best Practice

- PDFs are great to send over for customers to have a takeaway!
- Videos must be in .mp4 format
- Images are also a great way to share coupons with customers!


# Account Admin: Inventory Feeds

Josephine wants to double check that her inventory feed is showing up in the backend. Although this is run by Dealer Inspire, she wants to know where it is in case she needs to make a change to her inventory feed provider.

The Inventory Feeds tab is where you will find your dealership's inventory feed information.

This will be set up for you before Conversations goes live on your site, so you will not need to make any edits to this area.

## Manage Feeds

ADD NEW FEED

Location: All Locations    Filter:

| Location | Name | URL | Actions |
|---|---|---|---|
| Acura Demo | Acura Demo | http://acurademo.dev.dealerinspire.com//dealer-inspire-inventory/inventory_feed/?format=json | UPDATE |
| Alfa Romeo Demo | Alfa Romeo of Demo | http://alfaromeooem1.dev.dealerinspire.com//dealer-inspire-inventory/inventory_feed/?format=json | UPDATE |
| Anytown CDJR Demo | Anytown CDJR Demo | http://fcastandard1.dev.dealerinspire.com//dealer-inspire-inventory/inventory_feed/?format=json | UPDATE |
| Audi Demo | Audi | https://audidemo.dev.dealerinspire.com/dealer-inspire-inventory/inventory_feed/?format=json | UPDATE |
| Online Shopper | Austin Subaru | https://onlineshopper.dealerinspire.com/dealer-inspire-inventory/inventory_feed/?format=json | UPDATE |
| Cars.com | Chevy | http://chevydemo.dev.dealerinspire.com/dealer-inspire-inventory/inventory_feed/?format=json | UPDATE |
| Chevy Demo | Chevy | http://chevydemo.dev.dealerinspire.com/dealer-inspire-inventory/inventory_feed/?format=json | UPDATE |
| Chevy Canada Demo | Chevy Canada Demo | http://chevycanadademo.dev.dealerinspire.com//dealer-inspire-inventory/inventory_feed/?format=json | UPDATE |
| FCA Canada Demo | FCA Canada OEM RFP Demo | http://fcacanadaoemrfp.dev.dealerinspire.com//dealer-inspire-inventory/inventory_feed/?format=json | UPDATE |
| Ford Demo | Ford | https://forddemo.dev.dealerinspire.com/dealer-inspire-inventory/inventory_feed/?format=json | UPDATE |

← 1 2 3 →

If you need to make a change to your inventory feed provider,
please email: **conversationssupport@dealerinspire.com**

ADMIN

# Account Admin: CRMs

Much like the Inventory Feed, if Josephine is interested in seeing details about her CRMs, she can review that information as an Admin in Conversations.

Under the CRMs tab, you will find a list of all of your locations and team, and the CRM address associated with each one.

This will be set up for you before Conversations goes live on your site, so you will not need to make any edits to this area.

## Manage CRMs

ADD NEW CRM

Location: All Locations    Filter:

| Name | Type | Location | Team | Email Address | Actions |
|---|---|---|---|---|---|
| ANABOT TEAM | Email | Ana Bot Demo | ANABOT TEAM ★ | bsabatino@dealerinspire.com | UPDATE |
| Customer Support - Drivers Ed To Go | Email | Drivers Ed To Go | Customer Support ★ | caitlin@dealerinspire.com | UPDATE |
| Ford Sales | Email | Ford Demo | Sales ★ | noreply@dealerinspire.com | UPDATE |
| Ford Service | Email | Ford Demo | Service ★ | noreply@dealerinspire.com | UPDATE |
| Here to Help | Email | Honda Demo | Here to Help ★ | noreply@noreply.com | UPDATE |
| Hyundai Demo | Email | Hyundai Demo | Service ★ | noreply@dealerinspire.com | UPDATE |
| Hyundai Demo Sales | Email | Hyundai Demo | Sales ★ | noreply@dealerinspire.com | UPDATE |
| INFINITI Parts/Service | INFINITI Parts/Service | INFINITI Demo | Sales ★ | | UPDATE |
| INFINITI Sales | INFINITI Sales | INFINITI Demo | Sales | | UPDATE |
| Infiniti Sales | INFINITI Sales | INFINITI Demo | Sales ★ | | UPDATE |

← 1 2 3 4 5 6 7 8 9 →

If you need to make a change to your CRM address, please email:
conversationssupport@dealerinspire.com



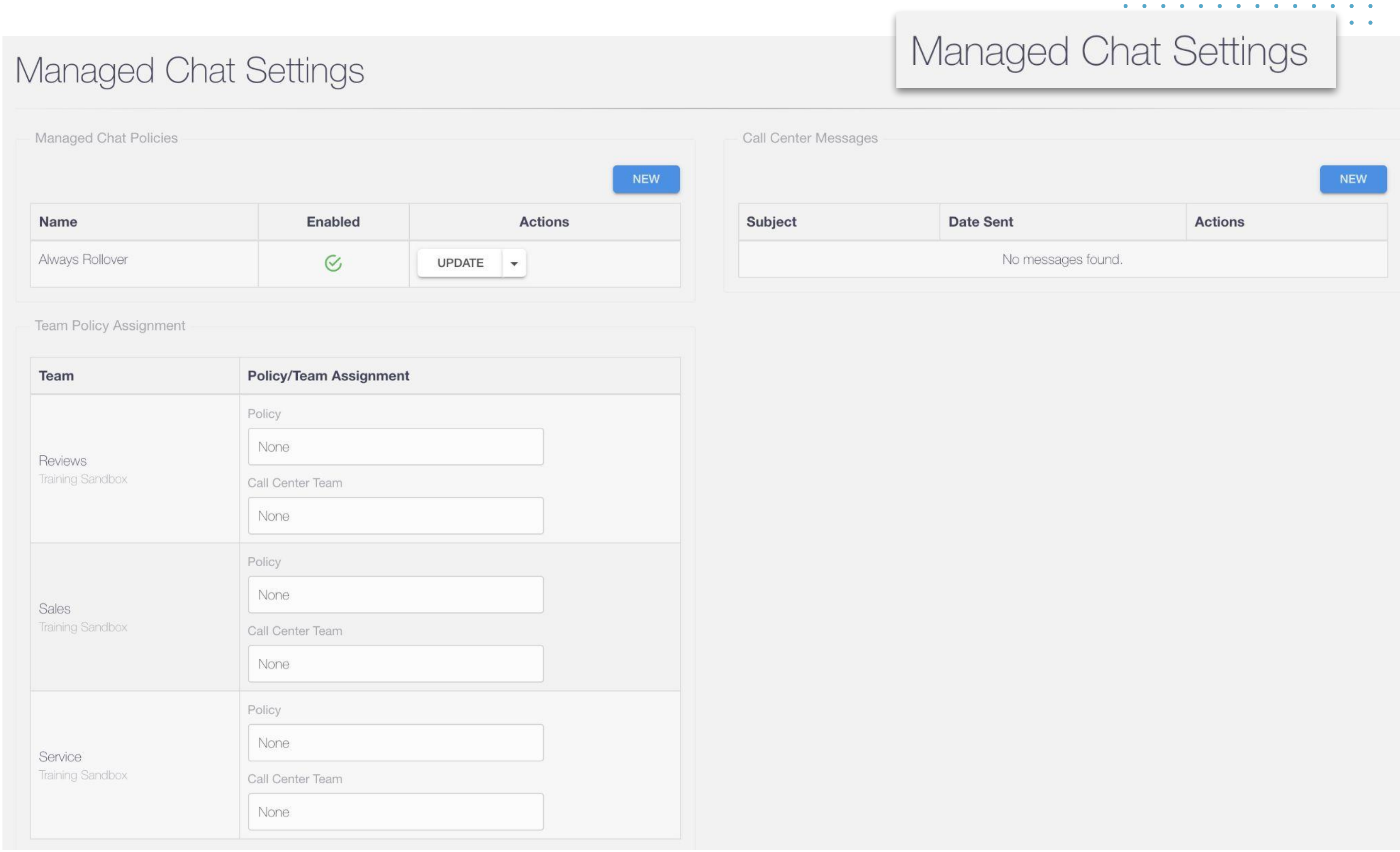
# Account Admin: Managed Chat

Josephine will be using a hybrid approach to answering chats, meaning that both her team and the Call Center Agents will answer chats on behalf of her dealership. She will need to set up rules to give her dealership a chance to answer before it rolls over to the Call Center and set up messaging for the Call Center as well!

Conversations' Managed Chat service allows you to use our call center to help you answer your incoming chats!

For more information about Managed Chat pricing and packages, please contact your Performance Manager or reach out to **conversationssupport@dealerinspire.com**

Within the Managed Chat tab, you can create rules determining when chats will go to the call center, and when they will be answered by agents at your dealership.



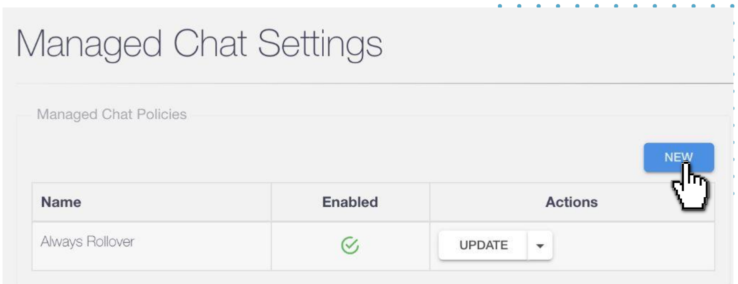
ADMIN

# Account Admin: Managed Chat

## How to Add a New Managed Chat Policy

To add a new rule...

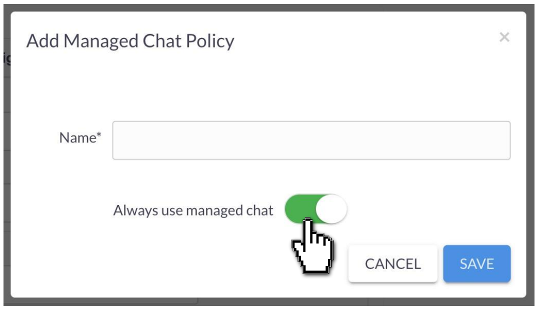
1. Click New
2. Give your rule a Name
3. Toggle the appropriate switches to build your rule as you wish

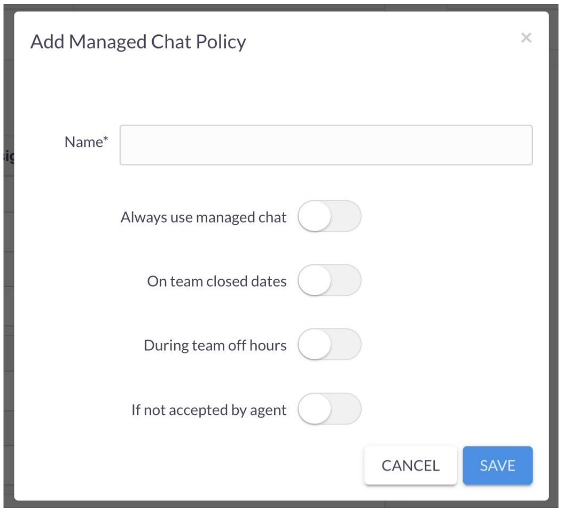



**Toggles**:

- **Always Use Managed Chat** – when turned on, this will cause all of your incoming chats to go directly to the call center. You will also notice that when this is turned on, the other rule options disappear
- **On Team Closed Dates** – on dates when the customer's selected team is not available, chats will go directly to the call center
- **During Team off Hours** – chats that come in outside of a team's available hours will go directly to the call center
- **If not Accepted by Agent** – dealership agents will have an opportunity to answer chats themselves. If no one responds within a specified number of seconds, the chat will roll over to the call center. We recommend selecting a maximum of 20 seconds.

The default when you add a new rule will have **Always use managed chat enabled**, but you can see the other options by turning this off.

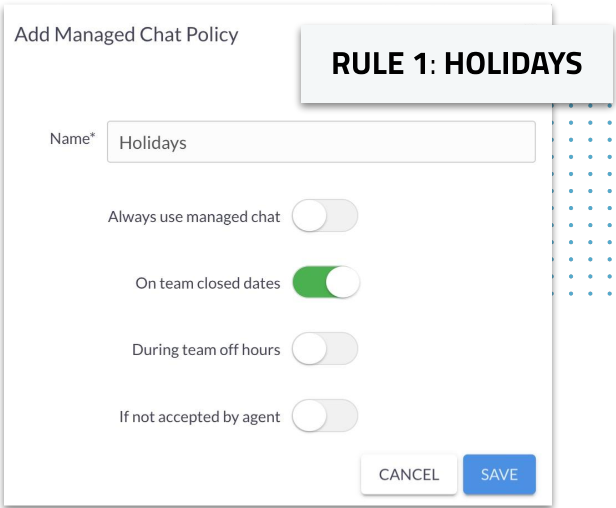


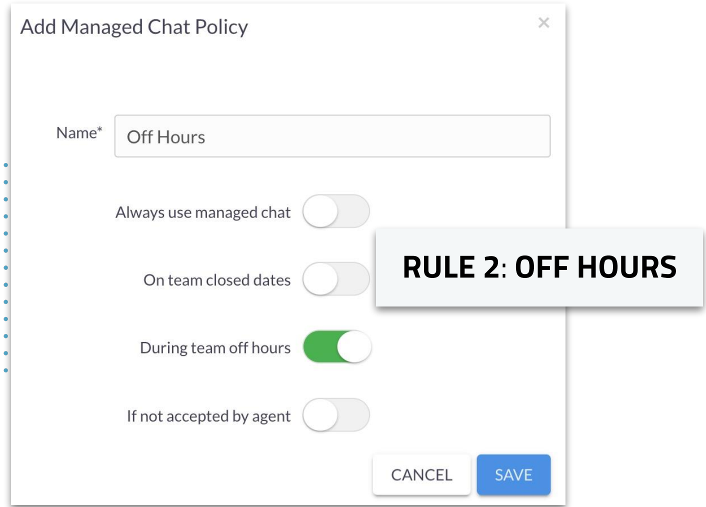



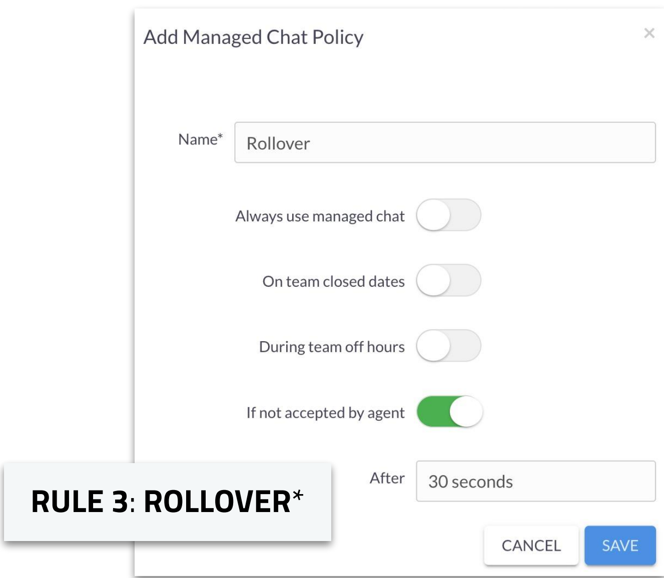

*Note: Team hours and closed dates can be adjusted within the **Teams** tab. For detailed instructions on how to do this, please see our document titled "Admin Overview – Conversations Settings."*

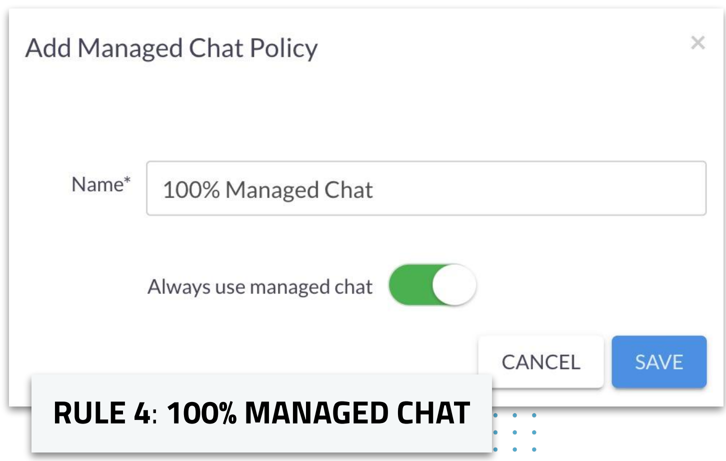

# Account Admin: Managed Chat

## Popular Managed Chat Rules




*You can set chats to rollover after 10, 15, 20, 25, 30, 45, 60 seconds if not accepted by one of your agents.

## Managing Existing Rules

- If you wish to edit an existing rule, click the dropdown arrow and then **Update**
- From this menu, you can **Disable** a Rule or **Deactivate** it as well



# Account Admin: Managed Chat

## How to Assign Your Policy

The next step is to apply your rule to teams at your location. Under “Team Policy Assignments,” you will see a list of all of your different teams.

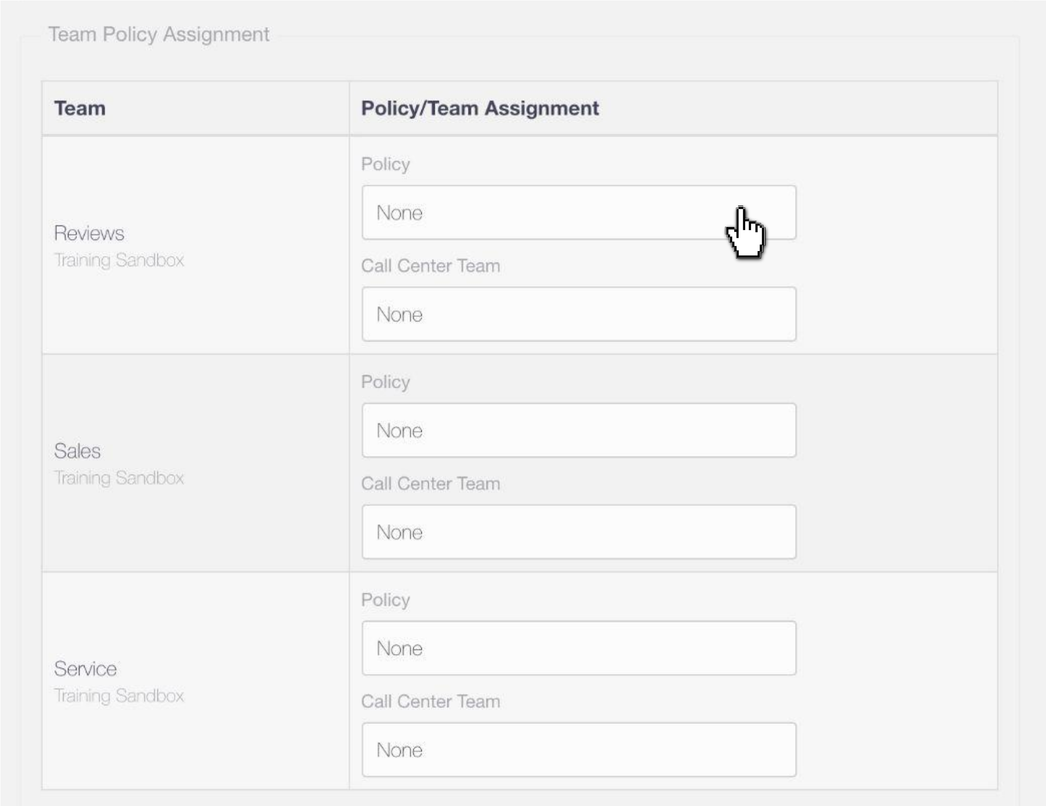
**To assign a rule to a particular team:**

1. Click the box under **Policy**
2. Select the name of your desired rule
3. Choose a Call Center Team

    This will always be “DI Call Center – Location 1.”

You can create as many different rules as you like, but only one Managed Chat rule can be assigned to each team.

*Note: You must assign the rule to a specific team in order for the settings to be applied.*



Team Policy Assignment

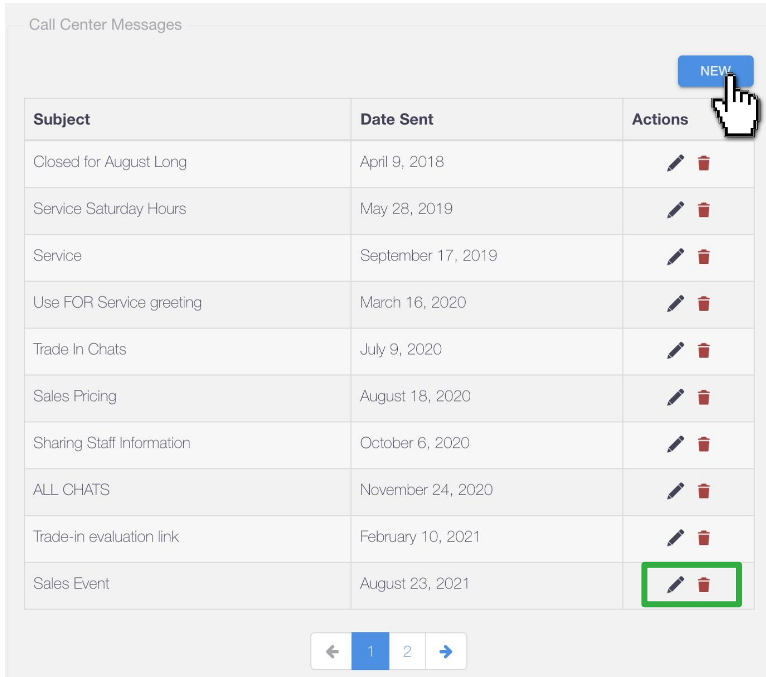
| Team | Policy/Team Assignment |
|---|---|
| Reviews<br>Training Sandbox | Policy<br>None<br>Call Center Team<br>None |
| Sales<br>Training Sandbox | Policy<br>None<br>Call Center Team<br>None |
| Service<br>Training Sandbox | Policy<br>None<br>Call Center Team<br>None |

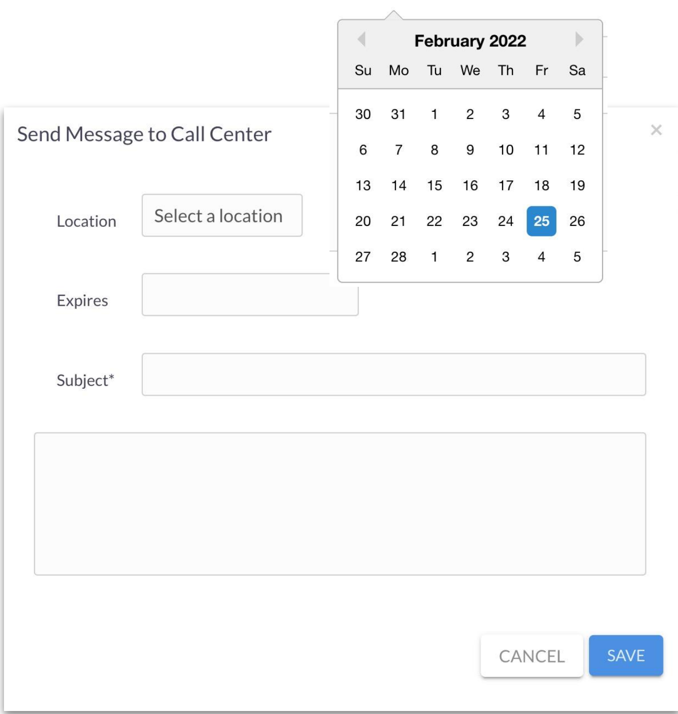

# Account Admin: Managed Chat

## Call Center Messages

The Call Center Messages area allows you to send notes to the call center.

This is a great way to alert them to special events you have going on at your dealership, weather-related closures, or any other information that you want them to be aware of.




## How to Create a New Call Center Message

1. Click **New**
2. Select your **dealership location** from the dropdown menu
3. Give your message an expiration date if you'd like to - select from the calendar pop-up
4. Give your message a subject (just like you would with an email)
5. Add the text of your message
6. Click **Save** to make your message visible to the Call Center team

Click the **pencil icon to edit** an existing message or the **trash can icon to delete** one (shown in green above).

## CHECK YOUR KNOWLEDGE

It's time to check your knowledge to see how you're doing!

1. What allows users in a chat to drag and drop common elements of a chat like files or videos?
   a. The Glove Compartment
   b. The Inventory Feed
   c. The CRM
   d. Managed Chat
2. Who should you reach out to if you have questions on your Inventory Feed or CRM?
   a. The Training Team
   b. Your PFM
   c. Conversations Support
   d. Your PM
3. What can you do in Managed Chat?
   a. Create Rules for when to roll chats over to Call Center Agents
   b. Assign Rules to Teams
   c. Create Messages for Call Center Agents to pass along to shoppers
   d. All of the Above

## REVIEW

What we covered in this section:

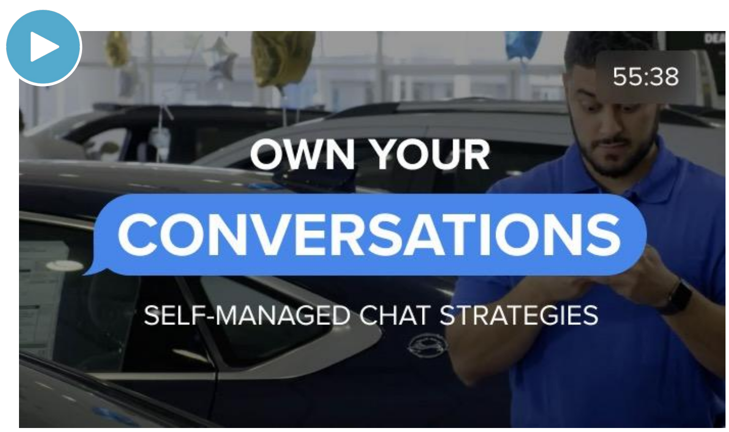
**Account Admin**
- **Glove Compartment**
- **Inventory Feeds**
- **CRMs**
- **Managed Chat**

Check your answers at the bottom of the page... how'd you do?

*"I got them all right!"*
🟢 Move on to the next section

*"I missed one."*
🟡 It might be good to review what you missed

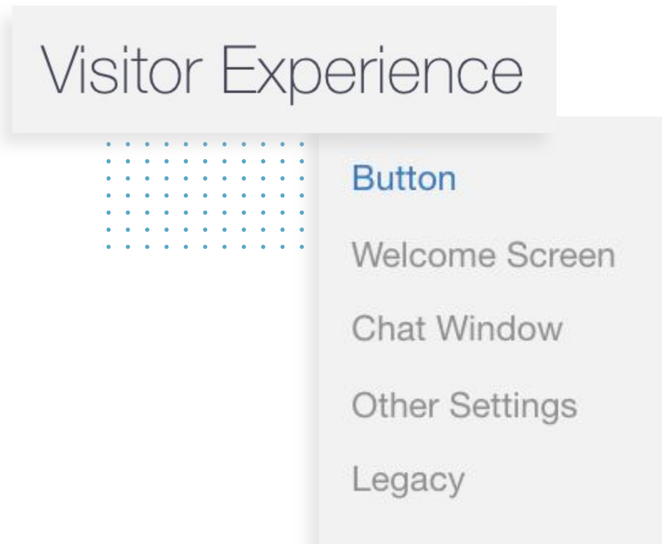
*"I missed two, if not all of them."*
🔴 Review the content linked above




Answers: 1-A, 2-C, 3-D

# Account Admin: Visitor Experience

As an Admin in Conversations, Josephine wants to make sure the Conversations Chat tool presents a visually and logistically appealing experience for the customer. In the Visitor Experience settings, she can customize all sorts of key functions and features.

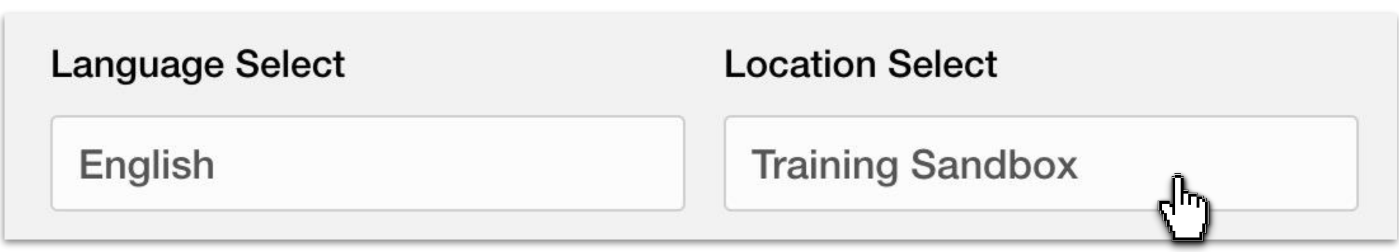



In the Visitor Experience section, there are key features to customize the user's experience, and gives Admins the freedom to customize visual details like what color the chat icon is, where it will appear on the page for the shopper on your site, and more!

You'll find functions like:

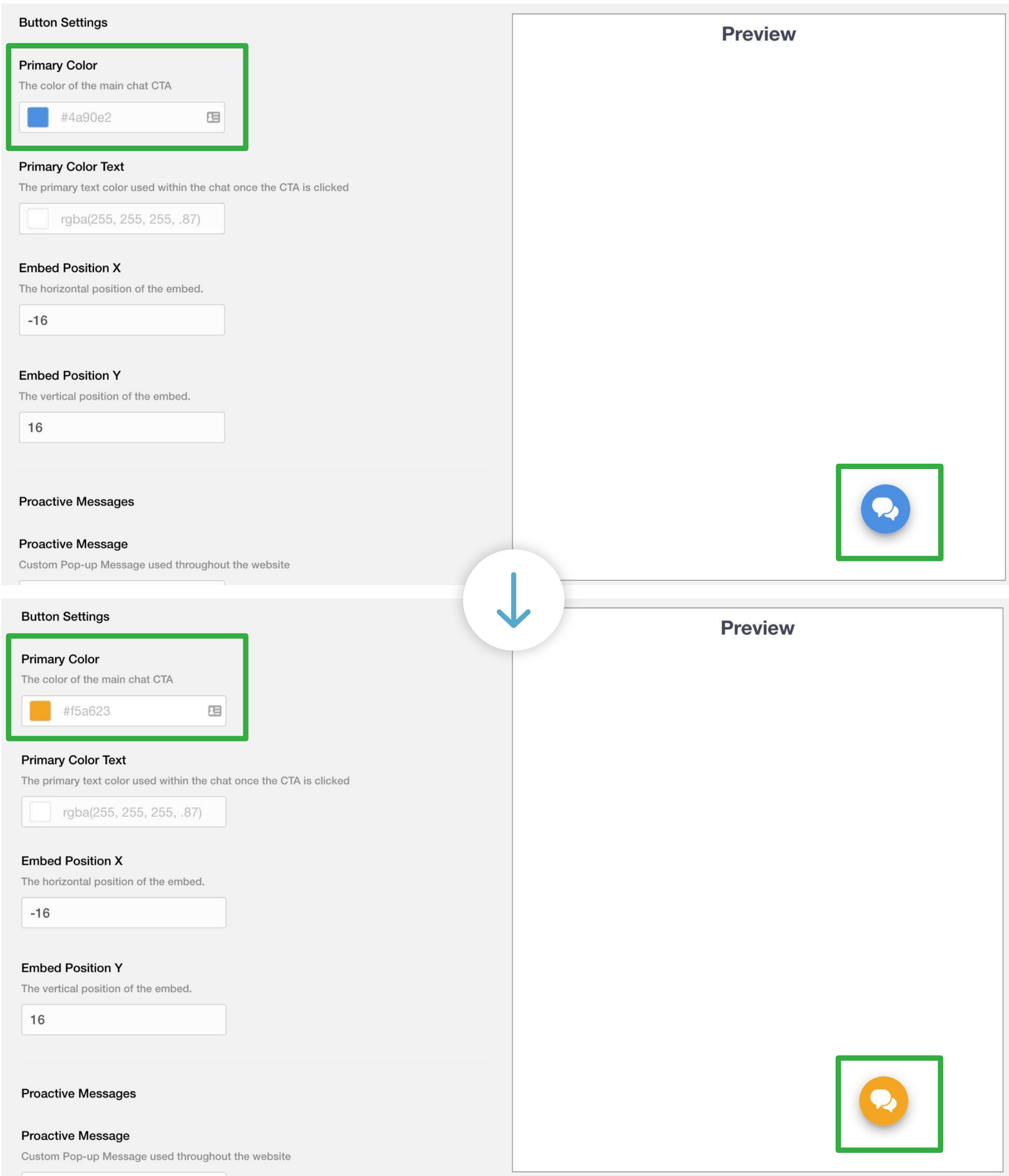
- Button
- Welcome Screen
- Chat Window
- Other Settings
- Legacy

Within the Visitor Experience tab, toggle between preferred **Languages** and the different **Locations** (if you are managing multiple dealerships) in the top right before you make any updates for each of the functions above!




## Preview

While in the Visitor Experience, you'll be able to preview your changes in the live preview to the right:




Example Shown Above: Updated Primary Color immediately displays in Preview

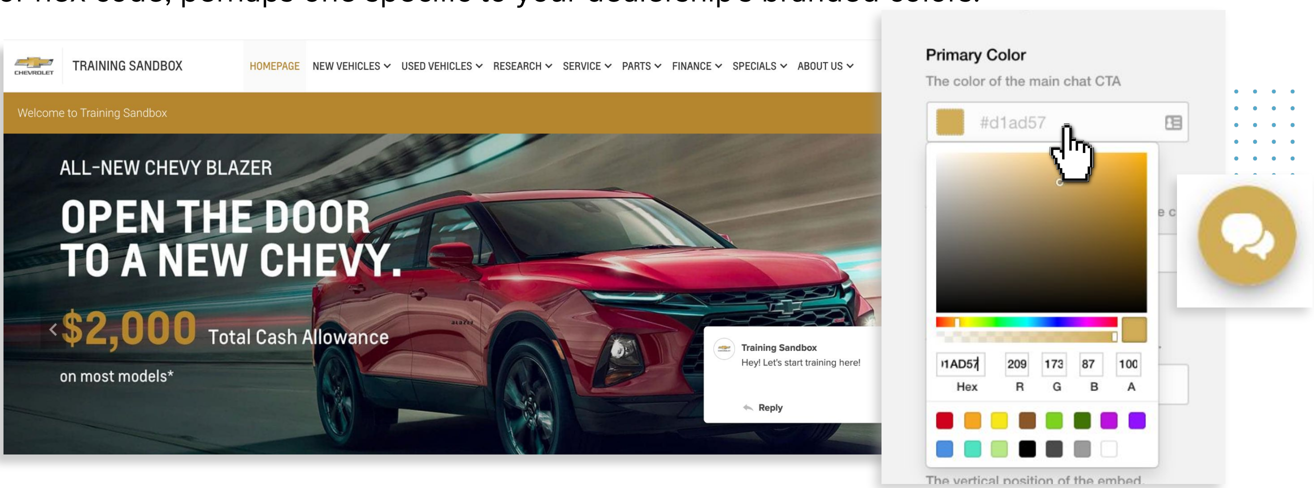
# Visitor Experience: Button

Josephine wants to change the color of the CTA button and how that looks for shoppers on her website. The Button tab under Visitor Experience takes admins  to Button Settings, where admins can customize details that determine how the chat looks and feels for shoppers.

## Primary Color

Within the button settings, you can change the primary color of the CTA and Chat Icons to whatever color fits your palette. The color will continue to be shown throughout the conversation.

Click into the Primary Color box to choose a color that is saved within the color window, or type in a color hex code, perhaps one specific to your dealership's branded colors!

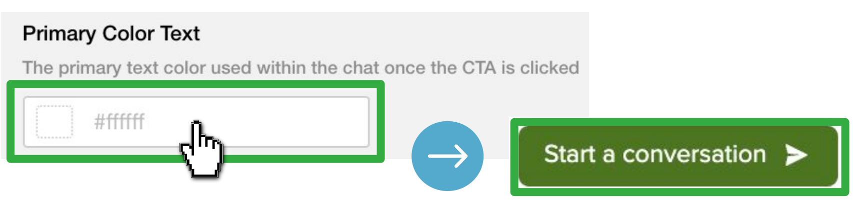



## Primary Text Color

You can also change the color of text on the CTAs and icons within the chat.

- Click into the white box and select a color or provide a hex code

For instance, if you change the color to green, but black text is too difficult to read... change it to white to make it easier to read!




### Best Practice

High contrast between the text color and background color is best for easy readability for your shopper!

# Visitor Experience: Button

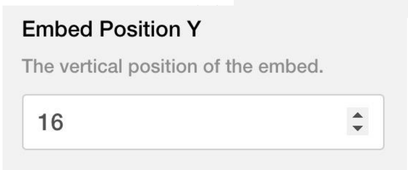
## Embed Position X and Embed Position Y

CALL TO ACTION

Admins can even customize where the chat icon falls on the chat pop-up screen!

With the **Embed Position X** and **Embed Position Y** functions, you can move the Call To Action Icon left or right ↔ (the X-axis) or up or down ↕ (the Y-axis).

1. Hover your mouse over the white box
2. Select the up/down arrows to change the value
3. This will move the embed icon up/down or left/right

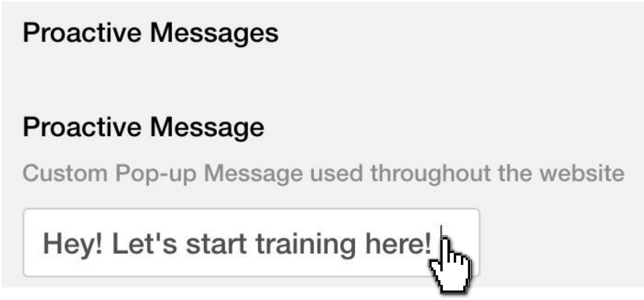




## Proactive Messages

Proactive Messages offer you the ability to customize an automatic pop-up message to draw your shopper's attention to the chat feature.

You can change this to something like:

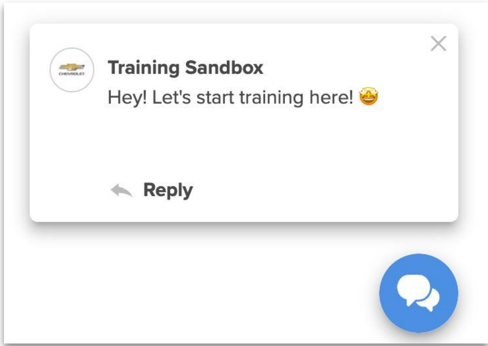
*"Hello! Have questions? We're here!"*




### How to Add an Emoji to Your Proactive Message

To add an emoji:

1. Right click in the white box where your Proactive Message is
2. Select **Emoji & Symbols**
3. Choose your desired emoji


PROACTIVE MESSAGE

**Best Practice**

Keep your proactive message short, sweet, and to the point! But make sure you're staying on brand!


# Visitor Experience: Button

## Popup Delay

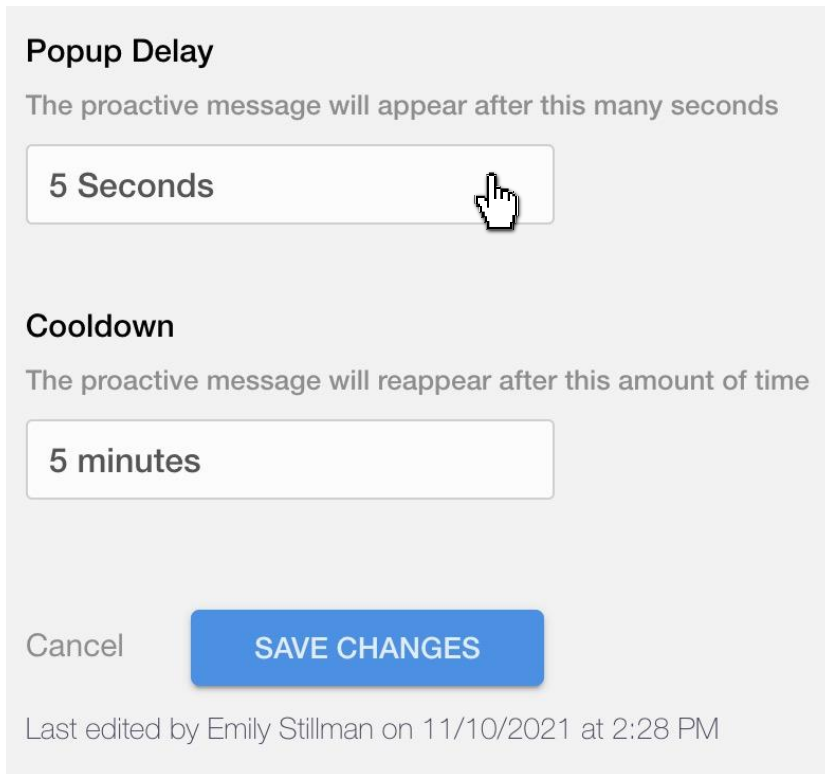
You can also decide how many seconds pass before the popup hits their screen. Choose from **1 second** to **10 seconds** before the popup shows up for the shopper.

## Cooldown

Similarly, if they minimize the pop-up chat message, you can use Cooldown set to a time delay. This time delay states how long it will take before the pop-up will reappear.

Your Cooldown Time choices include:

- 30 seconds
- 1 minute
- 2 minutes
- 5 minutes
- 10 minutes
- 15 minutes
- 24 minutes




## Saving Your Changes

After you've made all of your changes in the Button section of the Visitor Experience, don't forget to save your changes by clicking **Save Changes**.

Below the Save button, it will even show:

- The last person to edit these settings
- The date and time that those settings were saved

**Best Practice**

It may be best to set a cooldown that is a bit longer! You don't want your shoppers feeling frustrated by the popup message!

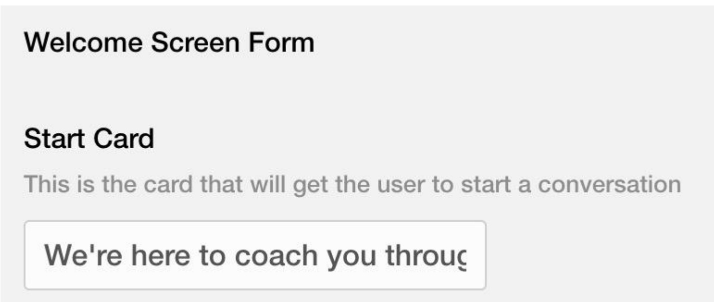
ADMIN

# Visitor Experience: Welcome Screen

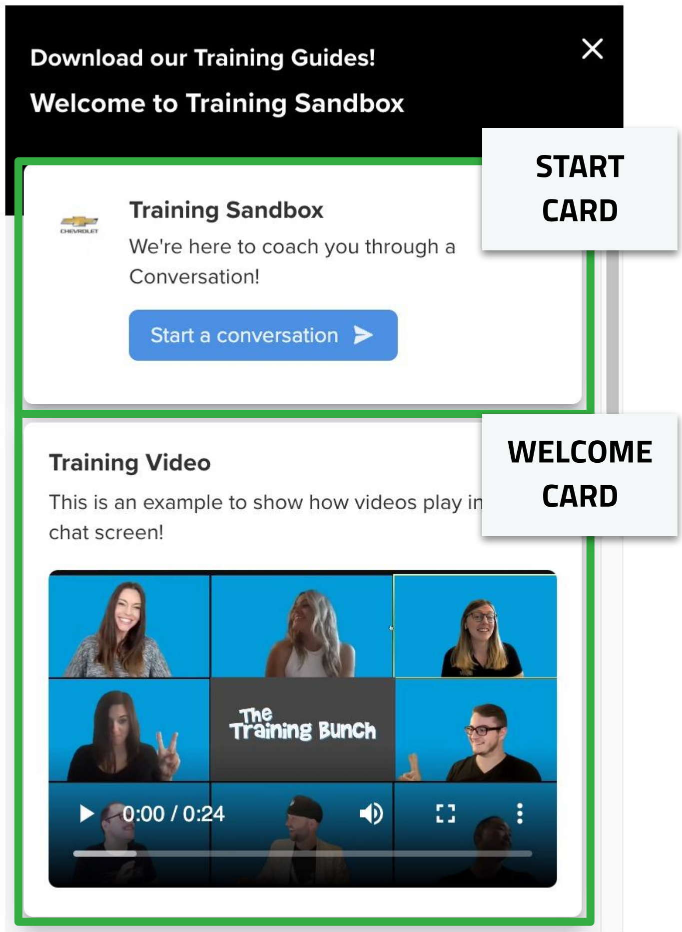
Part of customizing the look and feel of Conversations means setting up Welcome Cards. The Service Bay video she added to the Glove Compartment would be a great way to get people asking about how to schedule an appointment. She's decided to add it as a Welcome Card to get people interested in chatting further about Service.

## Start Card

The start card is welcome text located above the "Start a conversation" CTA. Don't forget that you can edit the features and see the preview in realtime in the preview window to the right.



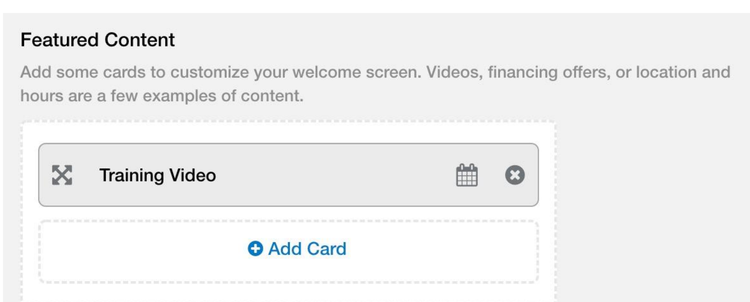

### Preview




## Featured Content

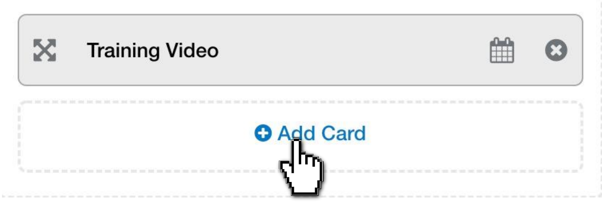
Featured Content allows you to customize the visual experience for the customer within your opened chat window.

We call these **Welcome Cards**, which show up for shoppers before starting a conversation. These might spark questions or conversations.




# Visitor Experience: Welcome Screen

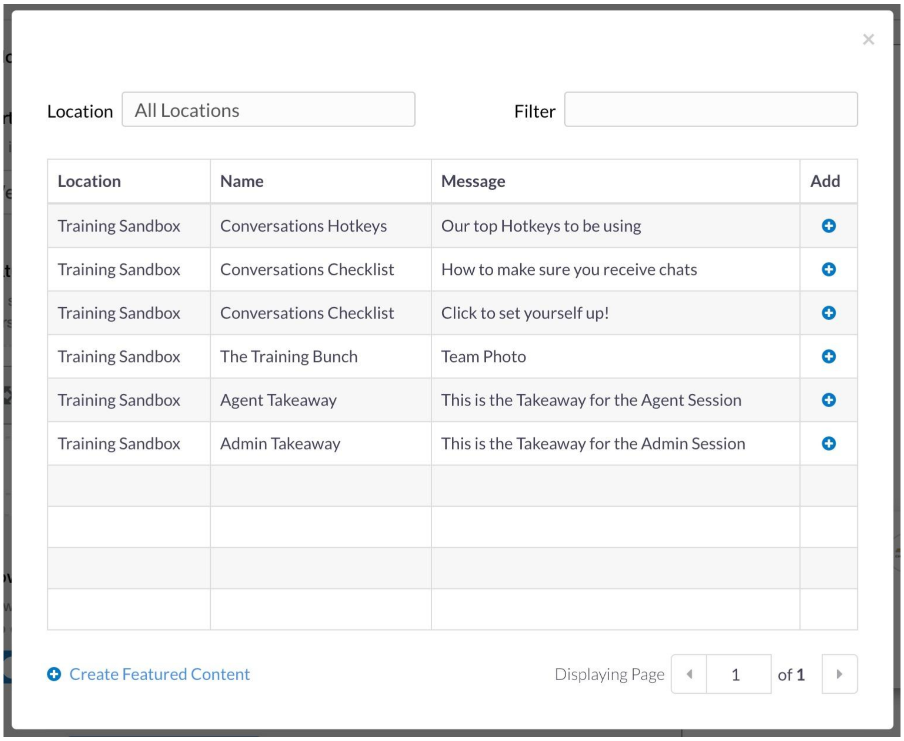
## How to Add a Welcome Card




You can add Welcome one of two ways: 1) by first uploading your content to the Glove Compartment or 2) by adding it directly to Featured Content.

To add a Welcome Card from previously created Glove Compartment files:

1. Click **Add Card:** this will open up a window of items within your Glove Compartment*
2. Add a card by clicking the **plus icon (+)** on the right in the display window




| Location | Name | Message | Add |
|---|---|---|---|
| Training Sandbox | Conversations Hotkeys | Our top Hotkeys to be using | |
| Training Sandbox | Conversations Checklist | How to make sure you receive chats | |
| Training Sandbox | Conversations Checklist | Click to set yourself up! | |
| Training Sandbox | The Training Bunch | Team Photo | |
| Training Sandbox | Agent Takeaway | This is the Takeaway for the Agent Session | |
| Training Sandbox | Admin Takeaway | This is the Takeaway for the Admin Session | |

*Note: you can filter by location or keywords*

### Best Practice

Create 2-3 Welcome Cards (in Featured Content) to have on display for your dealership. We recommend:

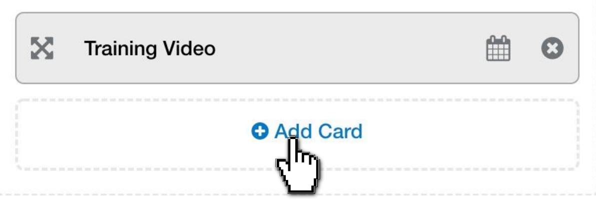
1. A card to reflect your special offers
2. A welcome video for your dealership (.mp4 format)
3. Sales event promotion


# Visitor Experience: Welcome Screen

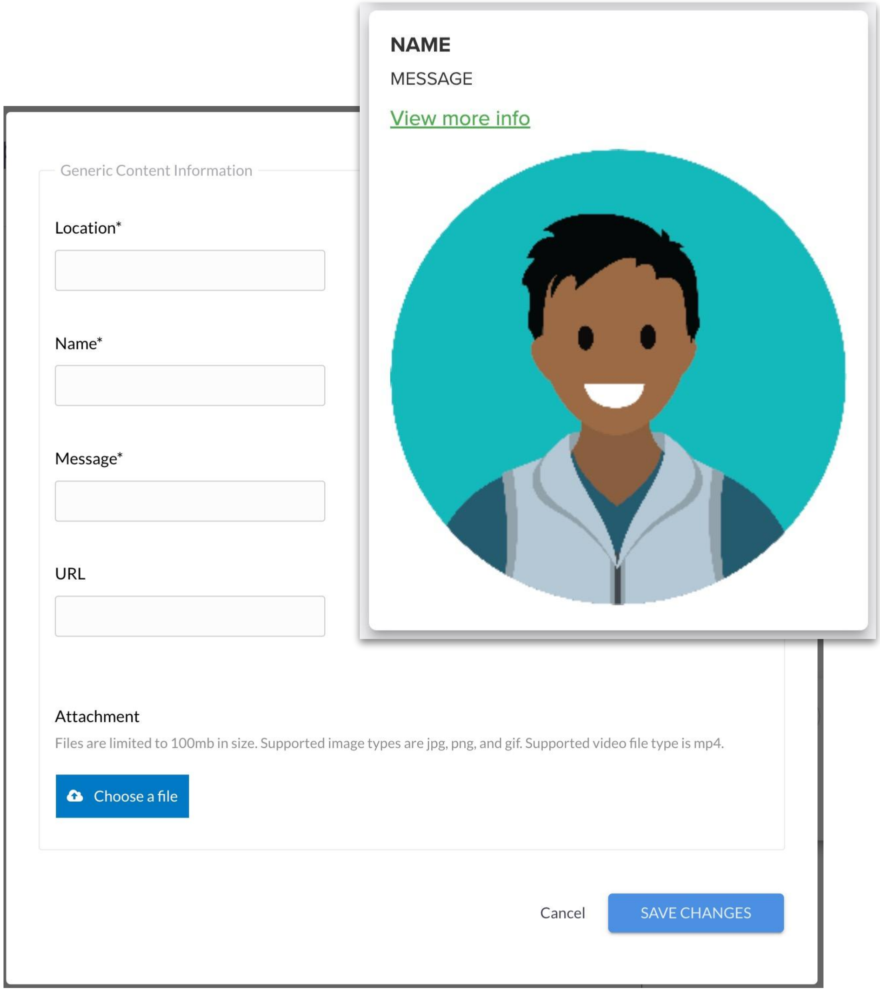
## How to Add a Welcome Card

To add a Welcome Card directly from the Visitor Experience:

1. Click **Add Card:** this will open up a window of items within your Glove Compartment*
2. Add a card by clicking **Create Featured Content** in the bottom left below your list of Glove Compartment files








3. Choose/Fill Out the following:
   a. Location
   b. Name
   c. Message
   d. URL - to make your Welcome Card clickable
   e. Attachment

In the example (shown left) you can see the Name, Message, and attachment (an image).

If you have a URL included, it will link to the image but you will also the text: View more info. This is also hyperlinked to give your shopper the cue to click!

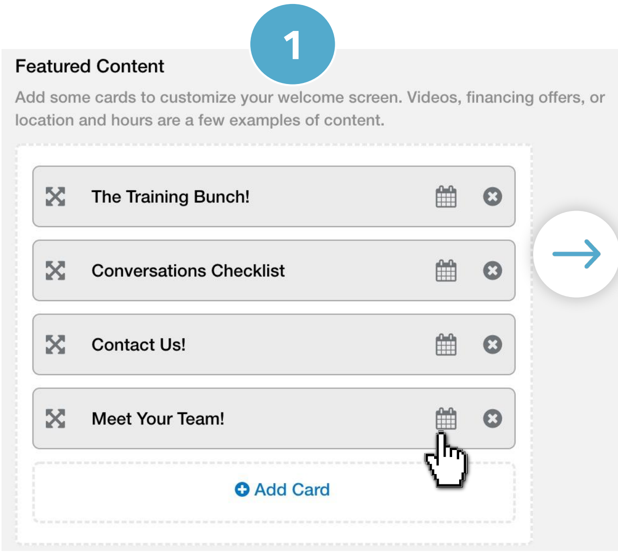
4. Click **Save Changes**

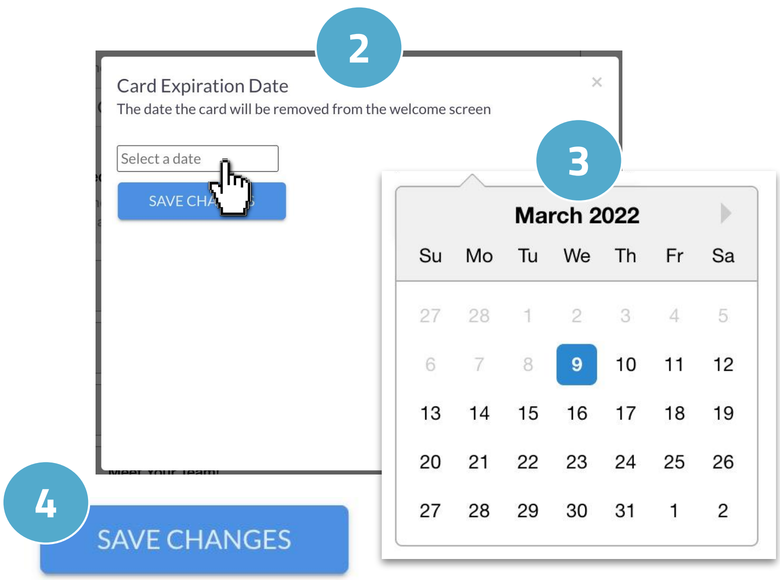


# Visitor Experience: Welcome Screen

## How to Add an Expiration Date to a Welcome Card

1. Click the **Calendar icon**
2. Click the white box that says **Select a date**
3. **Choose a date** from the calendar that appears
4. **Save Changes**




Once saved, you will see red text with the expiration date:


### Best Practice

Create a Welcome Card with your most recent incentive!

This can link out to a page with more information or take them directly to a VDP. Set the Welcome Card to expire when the incentive expires!

## How to Remove an Expiration Date

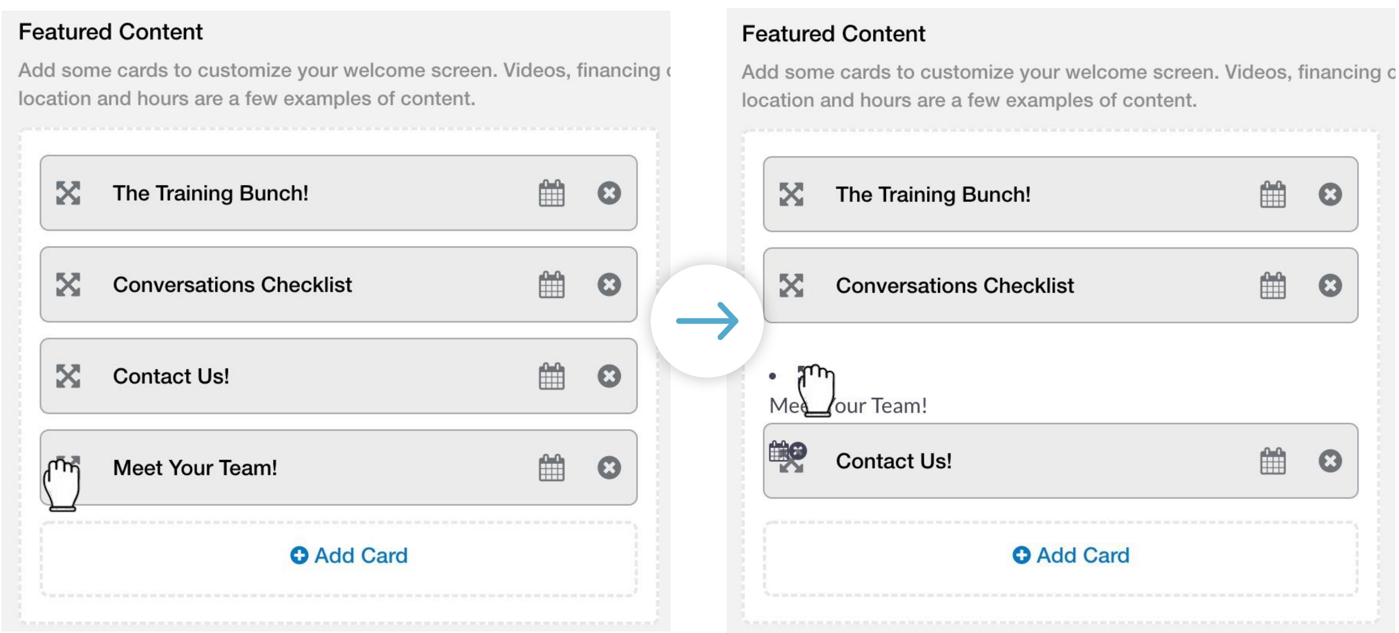
If you would like to remove an expiration date, click the calendar icon once again, and press the X to remove the expiration date.

# Visitor Experience: Welcome Screen

## How to Rearrange Welcome Cards

You can rearrange the order in which your Welcome Cards appear in the Chat for shoppers. To do this:

1. **Hover** over the arrows icon
2. **Click, drag and drop** the existing cards in the featured section to put them in your preferred order

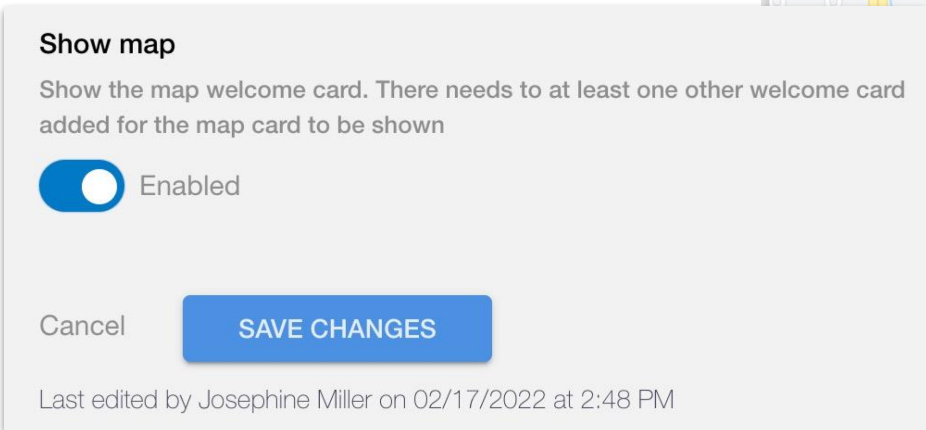


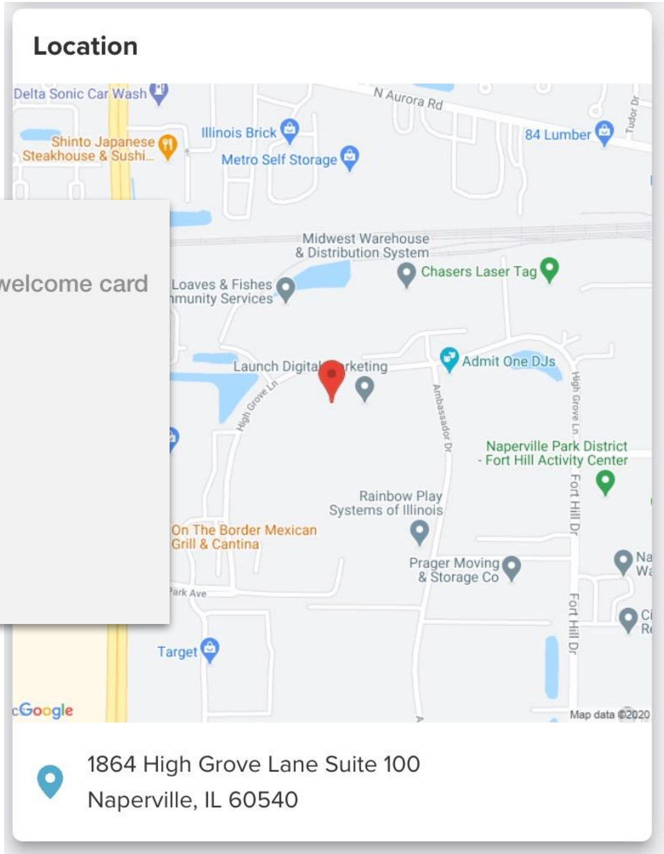

# Visitor Experience: Welcome Screen

## How to Turn the Map On/Off

You can toggle the map function on/off to show or hide the map location of your dealership below your Welcome Cards.

- To enable the map, switch the toggle on
- To disable the map, switch the toggle off




As with every other section of the Visitor Experience, when you are done making changes, press **Save Changes**.

### How-To Add a Welcome Card

1. Click Add Card under Featured Content
2. Select a File from the Glove Compartment and click the Plus

**or**

1. Click Add Card under Featured Content
2. Click Create Featured Content
3. Fill out the Location, Name, Message, URL (optional), Attachment
4. Save Changes

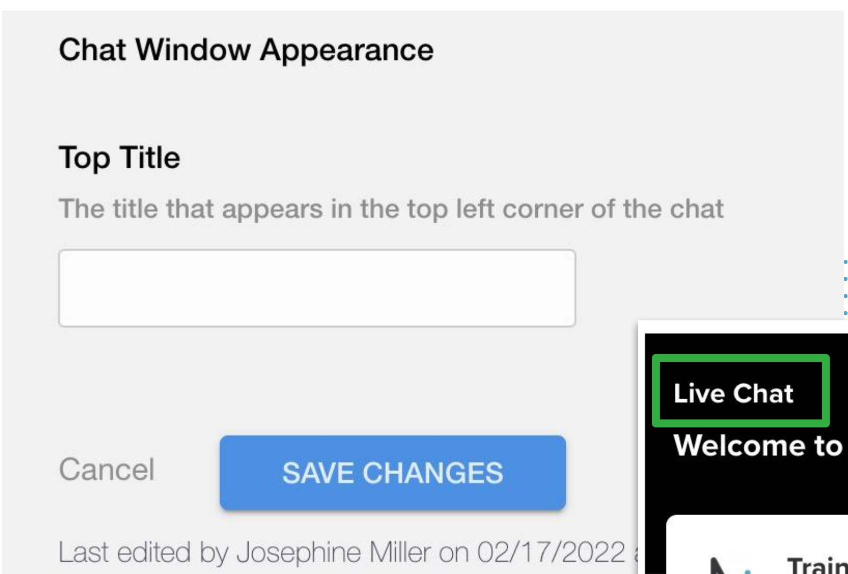

# Visitor Experience: Chat Window

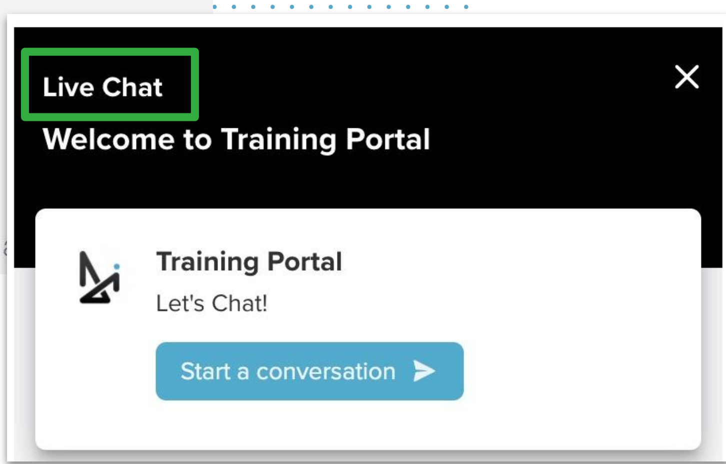
Josephine wants to edit the title that appears at the very top of the Chat Window when shoppers open the the Chat initially. Within the Visitor Experience, she can customize the Top Title in the Chat Window section.

In Chat Window, you can update the Top Title that appears for customers within the Chat WIndow for the shopper..

- To add a Top Title, click and type in the white box
- Leaving this field blank will default the Top Title to “Live Chat”

Remember to save your changes!




DEFAULT TOP TITLE


# Visitor Experience: Other Settings

As an admin, Josephine can utilize Other Settings to fine tune extra details to make the Conversations chat experience more efficient and user friendly, for Josephine and for the shopper!

In the **Other Settings** section, an admin can toggle various fields like: adjusting the Ana Bot, opting for the option to send a user to mobile and more.

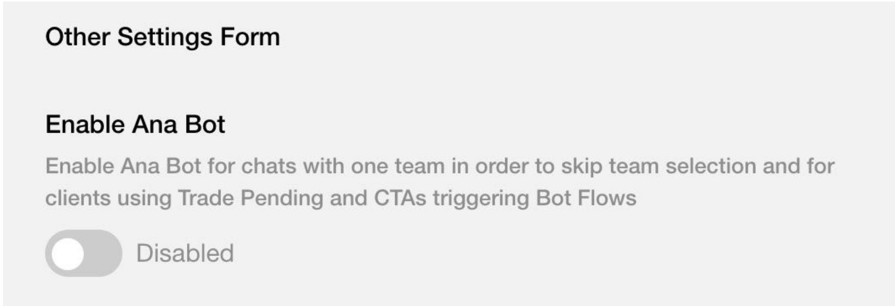
## Enable Ana Bot

You can enable Ana Bot, your chatbot assistant, here.

When enabled, Ana Bot will ask for:

- First and Last Name
- Email or Phone Number
- A brief message

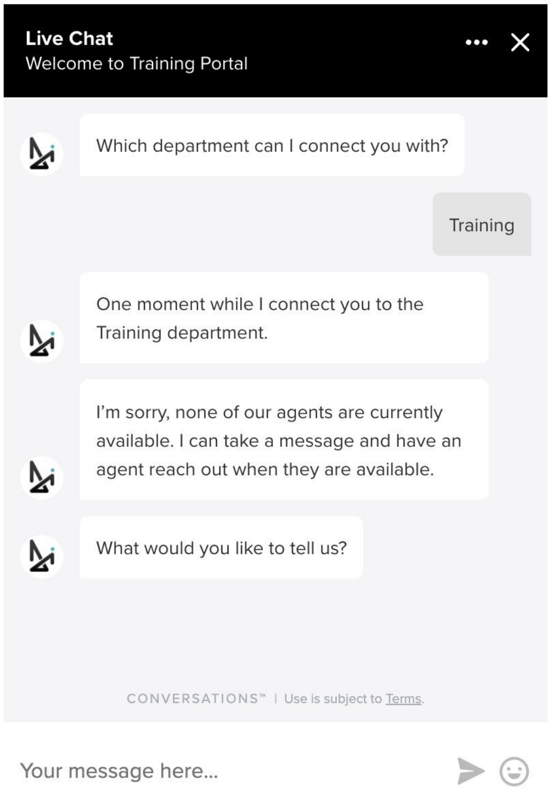
... if an Agent is unavailable.




If Ana Bot collects at least 3 pieces of information, it will be sent to your CRM. This will be shown in Conversation History.

Chats that only reach Ana Bot will be listed in Conversation History, just like chats that are accepted by clients.

If Ana Bot is disabled, it will just ask for a message without collecting information.




# Visitor Experience: Other Settings

## Send to Mobile

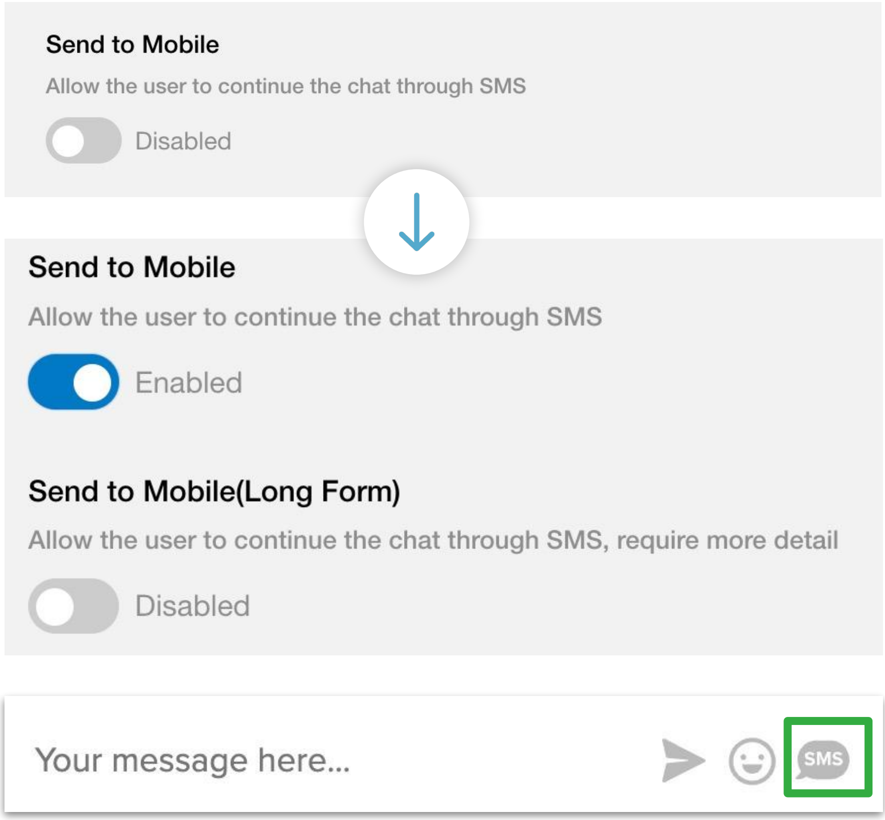
When enabled, this will allow the customer to click **SMS**, enter their phone number, and continue the conversation through SMS.

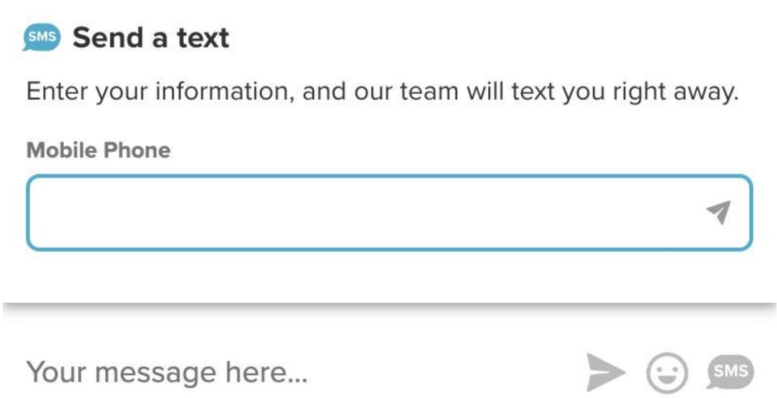
Above the Message Field, a shopper will be asked to input their Mobile Phone Number.

## Send to Mobile (Long Form)

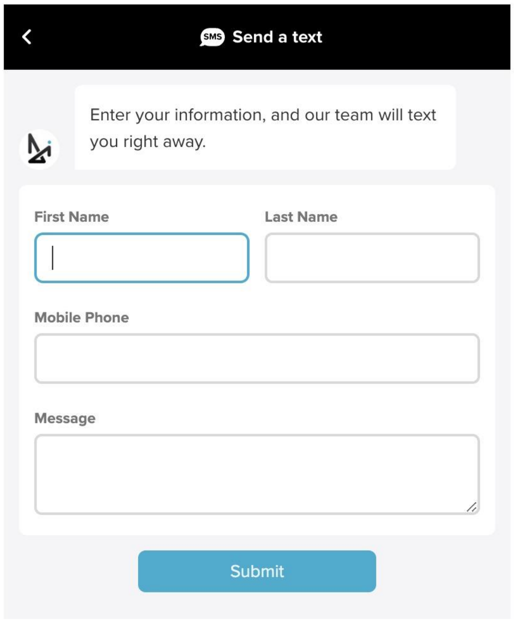
When Send to Mobile is enabled, you will receive the option to enable the Send to Mobile (Long Form).

The long form, when enabled, will ask for First Name, Last Name, Mobile Phone Number, and a brief Message.




SEND TO MOBILE

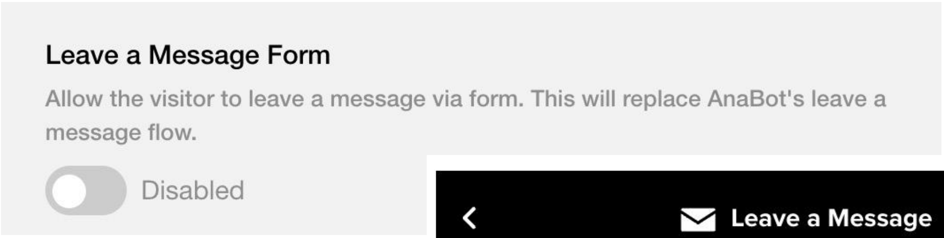


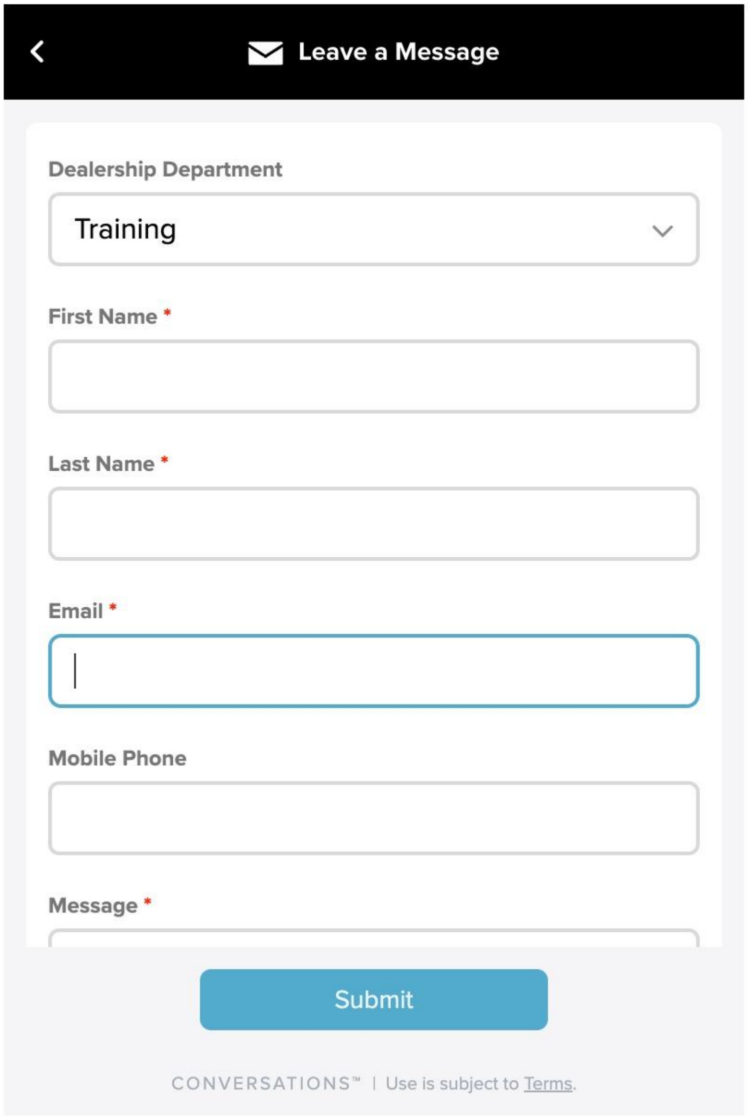

SEND TO MOBILE (LONG FORM)


# Visitor Experience: Other Settings

## Leave a Message Form

The Leave a Message Form allows the visitor to leave a message via a form. This will replace Ana Bot's leave a message flow.




The form will ask for:

1. Which Department they wanted to talk to
2. Their First Name
3. Their Last Name
4. Their Email
5. Their Mobile Phone Number (*optional*)
6. A brief message

Then they will click **submit**.

ADMIN

# Visitor Experience: Other Settings

## Lead Gate

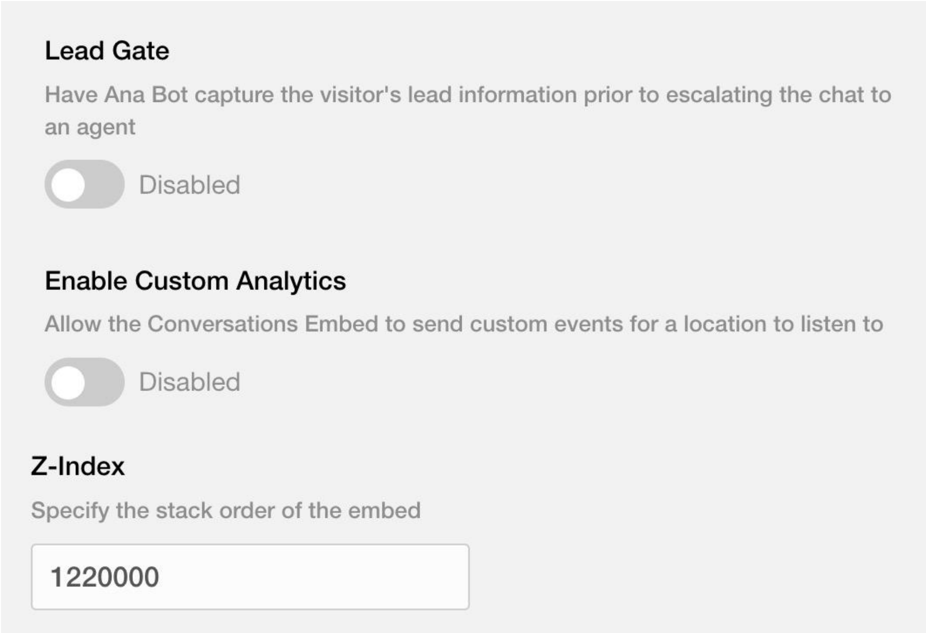
The Lead Gate will have Ana Bot capture the visitor’s lead information prior to escalating the chat to an Agent.

## Enable Custom Analytics

Enable Custom Analytics allows the Conversations Embed ot send custom events for a location to listen to.

## Z-Index

This is where you can specify the stack order of the embed.




**Best Practice**

While you can enable the Lead Gate, we do not recommend this. Shoppers are likely to abandon the chat if they have to provide information before reaching an Agent.

ADMIN

# Visitor Experience: Other Settings

## DDC CTA Text

Write the text that will show on a Dealer.com CTA in this field.

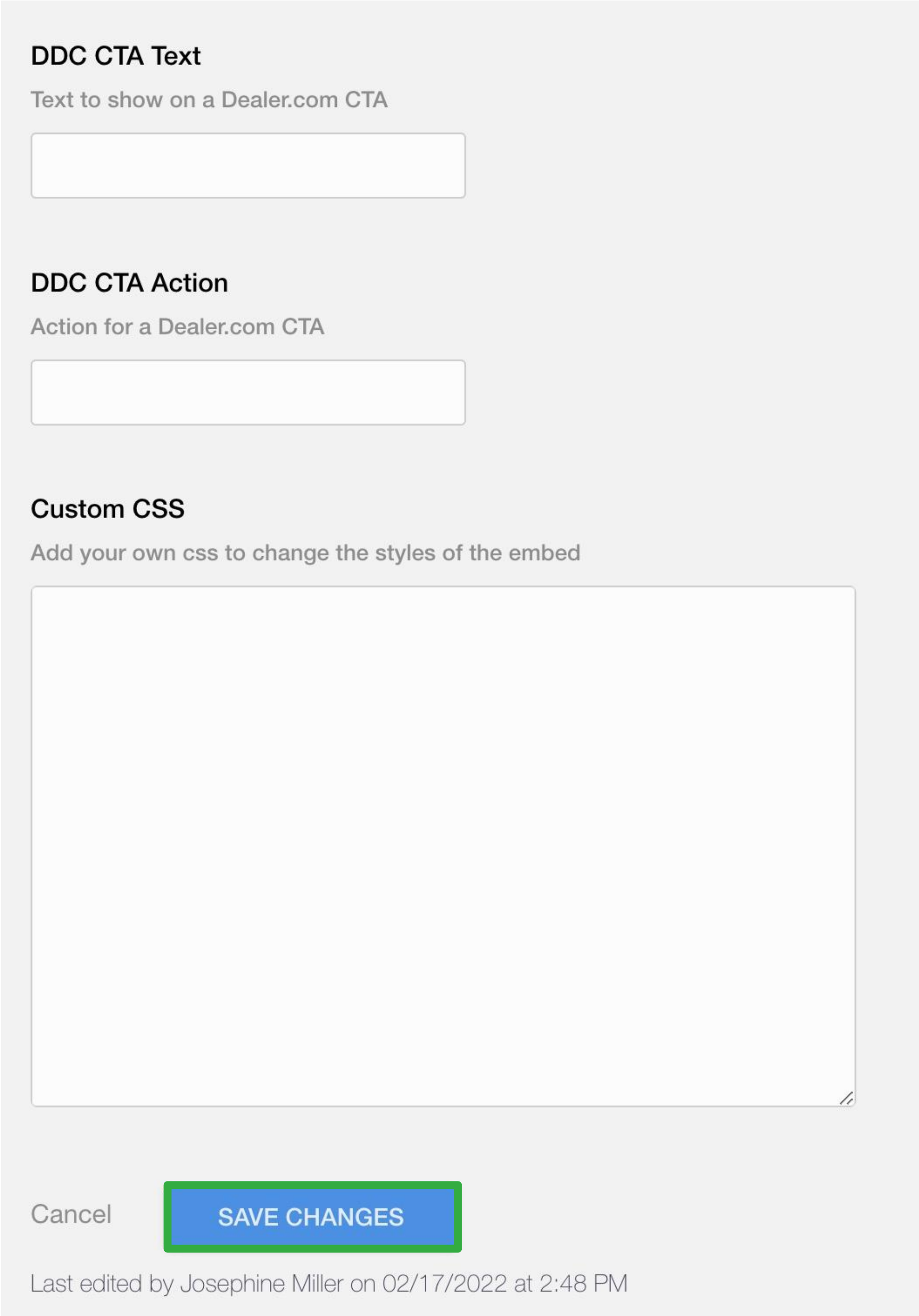
## DDC CTA Action

Add an action for a Dealer.com CTA in this field.

## Custom CSS

If you're code savvy and would like to add your own custom CSS into Conversations, you can add that in the Custom CSS field.

Don't forget to, as always, **save any changes** you're making as you go along.

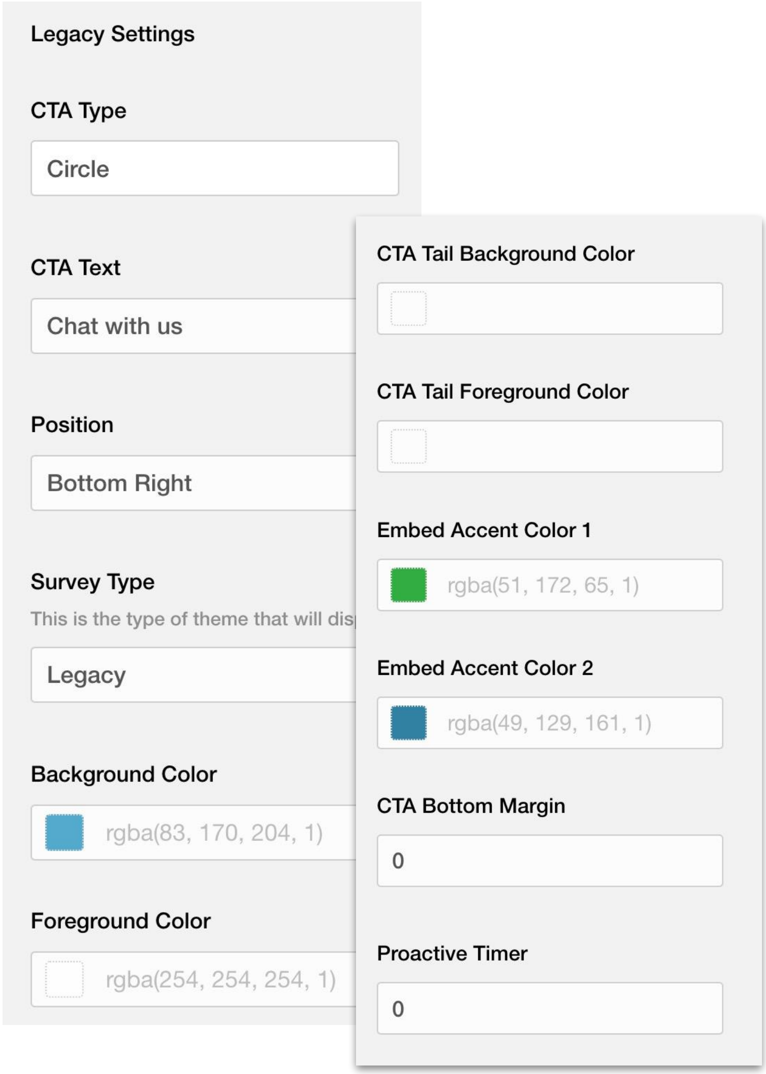



# Visitor Experience: Legacy

Josephine is a newer client to Conversations, so she does not need to worry about Legacy settings that appear in the Visitor Experience. However, let's explore what's in this tab to learn more!

The Legacy section is only for older versions of Conversations. In this section of Conversations, Josephine would be able to update the following:

- CTA Type:
  - Circle with Tail
  - Circle
  - Tab
  - None (for developers)
- CTA Text
- Position:
  - Bottom Left
  - Bottom Right
  - Left
  - Right
- Survey Type: This is the type of theme that will display after the chat is over
  - Legacy
  - GM
- Background Color
- Foreground Color
- CTA Tail Background Color
- CTA Tail Foreground Color
- Embed Accent Color 1
- Embed Accent Color 2
- CTA Bottom Margin
- Proactive Timer

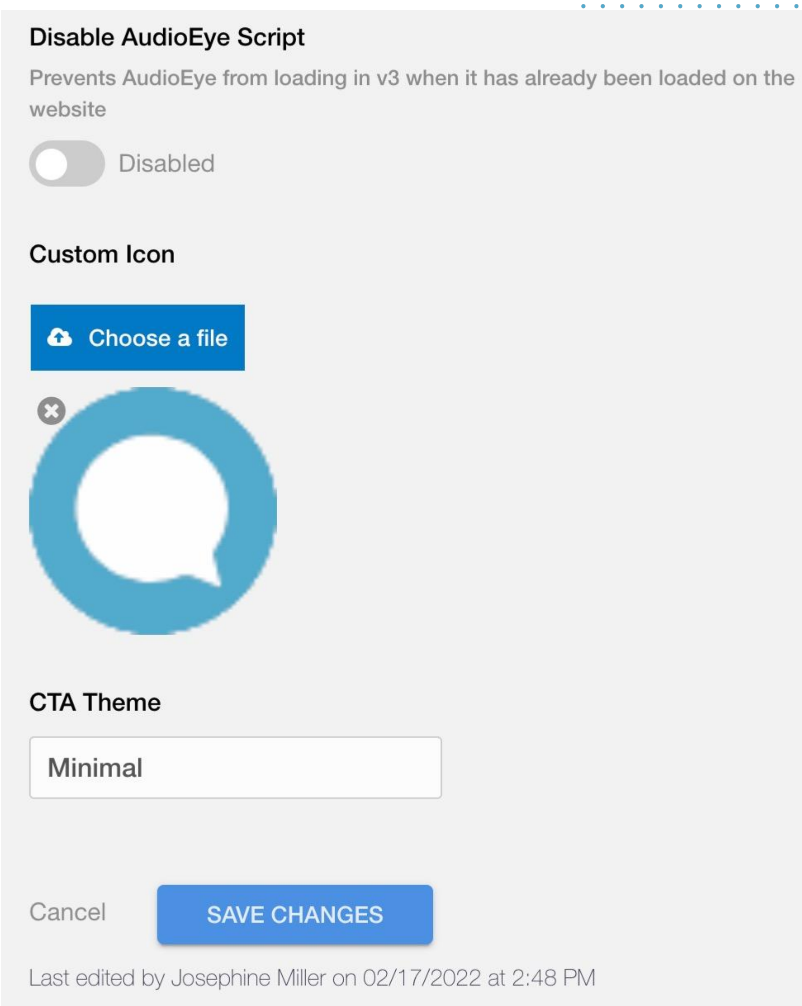




# Visitor Experience: Legacy

You can also adjust:

- Disable AudioEye Script: Prevents AudioEye from loading in v3 when it has already been loaded on the website
- Custom Icon
- CTA Theme




## CHECK YOUR KNOWLEDGE

It's time to check your knowledge to see how you're doing!

1. What do you see below the Save Changes button within the Visitor Experience?
   a. Which location made the last edits
   b. Who made the last edits and when they were saved
   c. A log of when you last logged in
   d. None of the above
2. How long of a Popup delay can you set?
   a. 1-10 seconds
   b. 1-10 minutes
   c. 1-24 seconds
   d. 1-24 minutes
3. If you have a Welcome Card hyperlinked, what will the text say to alert customers that it's clickable?
   a. Click to open in a new window
   b. Click here
   c. Click to view more
   d. View more info
4. What does the Top Title default to?
   a. Live Chat
   b. We're Here for You
   c. Let's Chat
   d. Have a Question?
5. What does Send to Mobile's short form ask for?
   a. Email
   b. Mobile Phone Number
   c. First Name
   d. Last Name

## REVIEW

What we covered in this section:

**Account Admin**

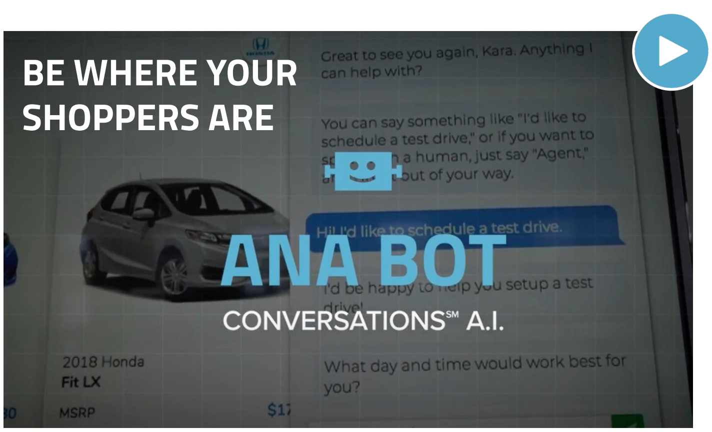
**Visitor Experience**

Check your answers at the bottom of the page… how'd you do?

*"I got them all right!"*
🟢 Move on to the next section

*"I missed a few."*
🟡 It might be good to review what you missed

*"I missed most, if not all of them."*
🔴 Review the content linked above




Answers: 1-B, 2-A, 3-D, 4-A, 5-B


## CONGRATULATIONS!

Josephine is set up to answer chats, even as an Admin. She has her bases covered in terms of reporting and setting up her dealership for success with Conversations customization.

She can add users, update teams and settings, upload to the Glove Compartment, takeover chats, and even customize the look and feel of Conversations for her customers!

## LEARN MORE!

### LEARN ABOUT MOBILE

You can also answer chats on your mobile device! We have the Conversations Mobile app for iOS and Android.

If you were answering chats on desktop and need to switch to Mobile, the Mobile app allows you to answer on-the-go without missing a beat!

### LEARN ABOUT AGENT

If you are an Agent, you can answer chats and have access to some of the backend of Conversations.

Check out our Training Guide on Conversations: Agents in Training Camp or in the GM Knowledgebase today! We'll walk you through logging in, setting up your profile, and answering chats effectively!

### REACH A TRAINER!

Have a question or looking for additional resources or training?

Reach out to a Trainer!

Email us at trainers@dealerinspire.com and someone will reach out!