



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!



Home

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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

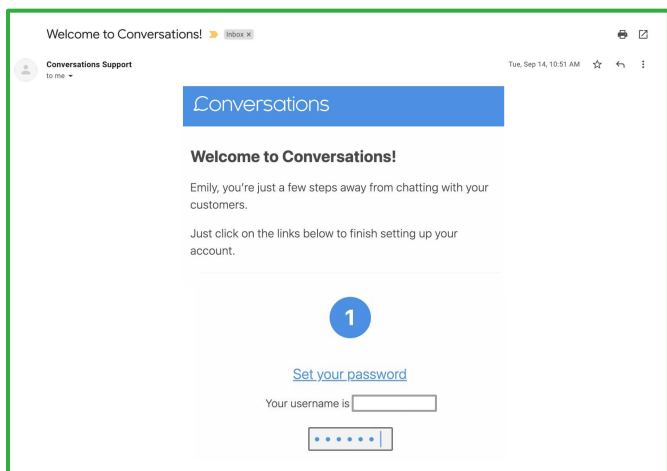


Meet Josephine! Josephine is the new Manager at her Dealership, DI Motors, and has just been set up with a login for Conversations.

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: conversationsupport@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!



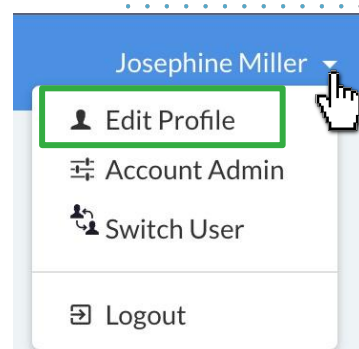
Profile Set Up



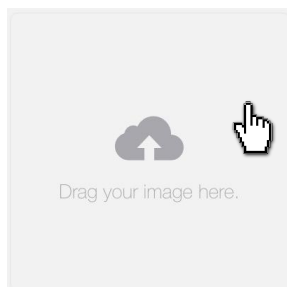
Josephine is now logged in to Conversations! 🎉

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



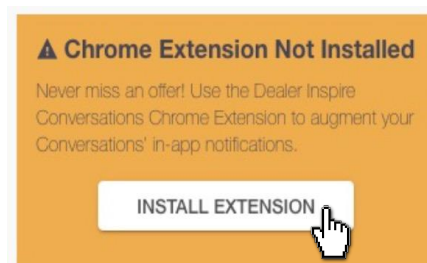
Recommended Image Size

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

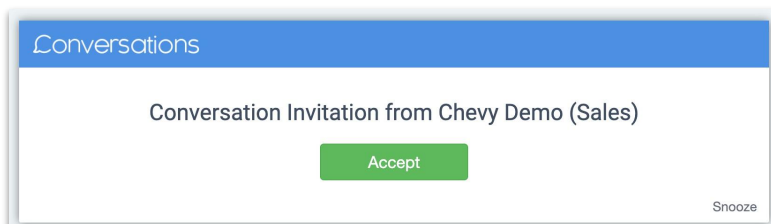
3. The next step is to install the **Chrome Extension** so that you can get notified when customers are looking to chat on your site

- This is only for desktop, not for mobile


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

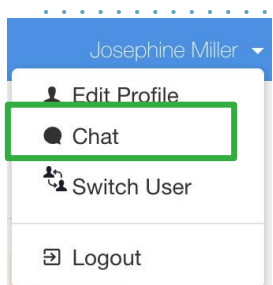


Once you see **Extension Installed** you're all set to receive notifications like the one below, when customers are looking to chat on your site:

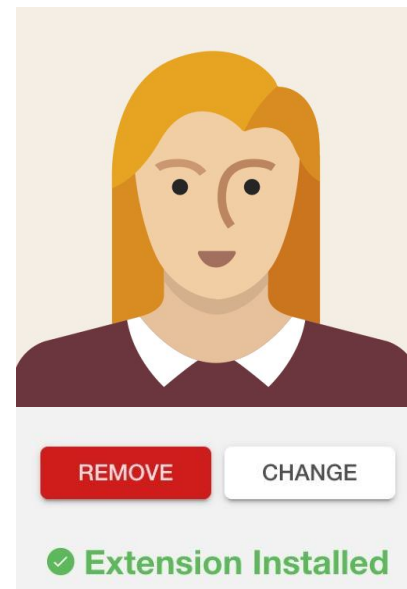


Setting up to Receive Chats

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

HOW TO HAVE (WAY) MORE TRADE-IN CONVERSATIONS

117% CHAT LEAD INCREASE
Before vs. After This Strategy

DELANO CHEVROLET

Live Chat
Welcome to Ford Demo!

Michelle Monemara

What is your email or phone number?

michele@delano.com

Thanks, Michelle!

The estimated value to the dealership is between \$14,270 and \$16,540. See why: [https://my.ford.com/leadgen/](#)

We can give you a firm offer on your Jetta when we see it in person. Would you like to talk to a sales representative?

1:55



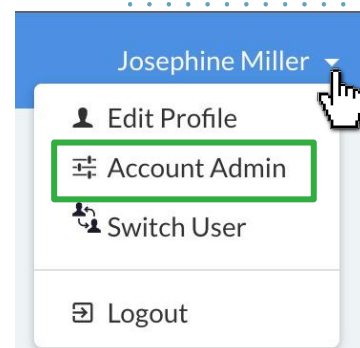
Reporting: Overview



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

Reporting

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Account Administration

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- 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!





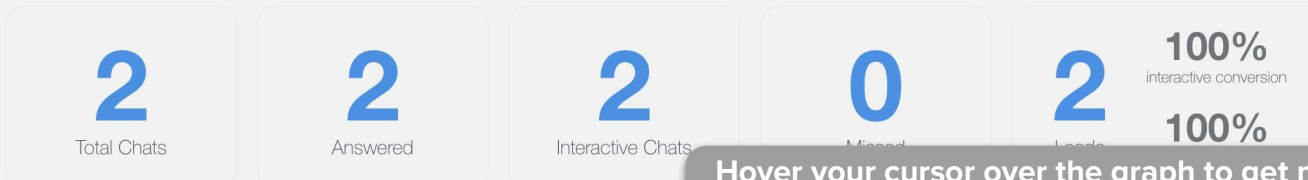
Reporting: Dashboard



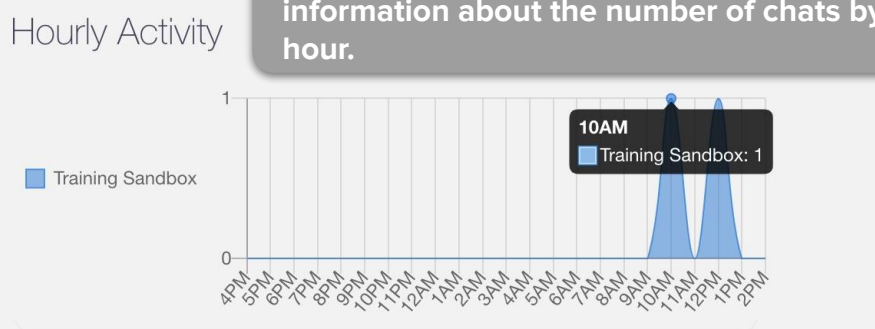
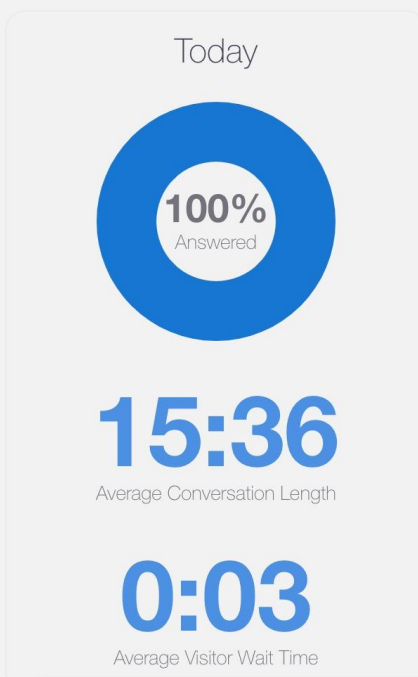
To start off, Josephine will see a high-level overview of all of her associated dealership within the Dashboard. She can dive deeper into a specific location, or view trends across her dealerships.

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

Training Sandbox Dashboard



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



Locations

- Training Sandbox ●

[View Dashboard](#)

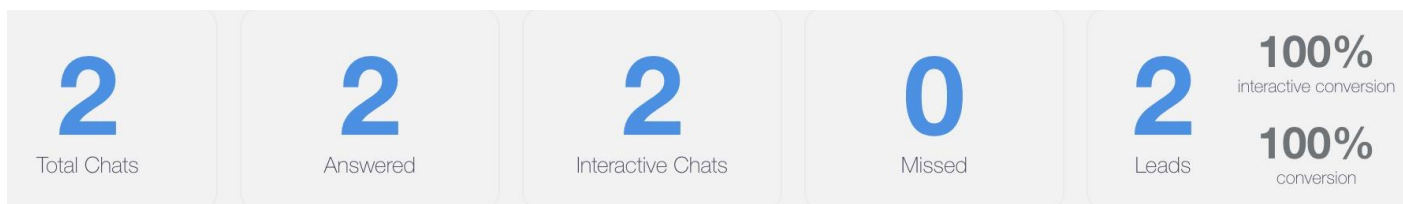
Multiple locations will show up here if you are associated with more than one dealership. Click "View Dashboard" to drill down to view the dashboard for that dealership.

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



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?

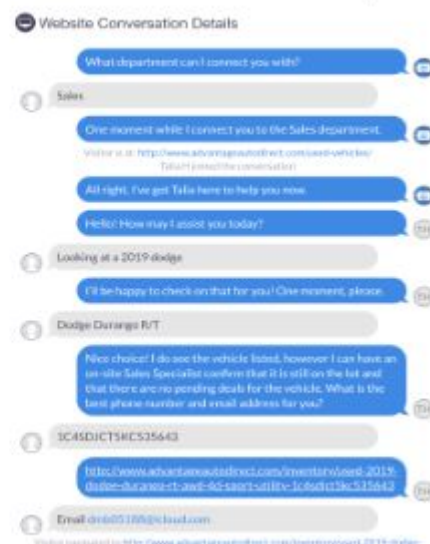
An Interactive Chat occurs when a visitor has sent at least one message to an Agent after escalation.

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.



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

Sold Customers

Jan 25, 2022 - Jan 31, 2022

Date Range: [Today](#) [Yesterday](#) [Last 7 Days](#) [Last 30 Days](#) [Last 90 Days](#) [Custom](#)

Source: Location:

0 Sales

0% of conversations

0.0 per day

\$0 Total Gross Profit

\$0 Average Profit Per Sale

0 Number of Chats

Customer	Sale Date	Vehicle Purchased	Stock	Gross Profit	Source	Dealership
No Results Found						

▶ 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.

This is where we could tell you how many sales are connected to Conversations and give you details about each one of your buyers that messaged your dealership.

We want to crunch the numbers for you, but we don't have access to your DMS data.

[CONNECT MY DMS](#)



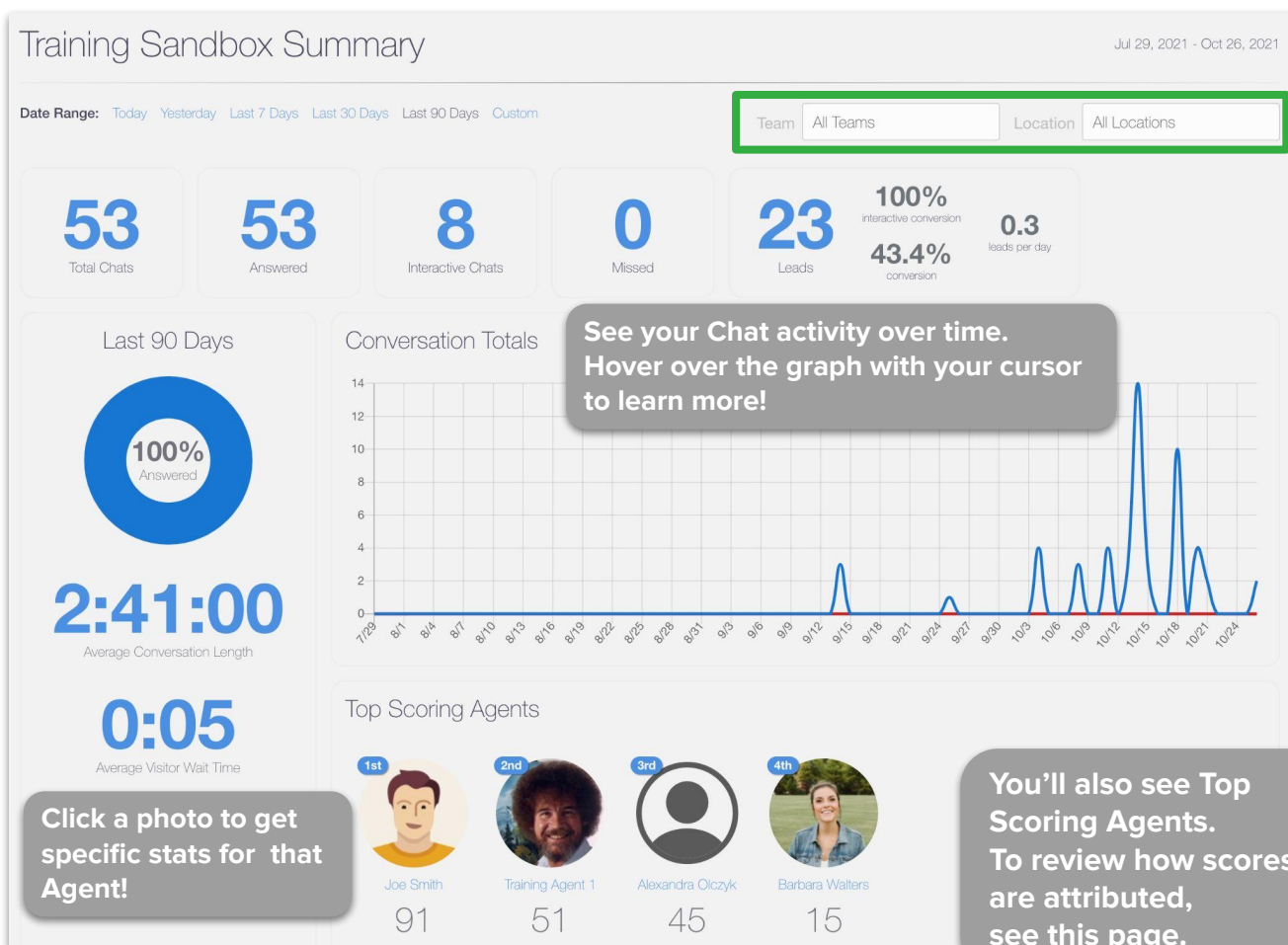
Reporting: Summary



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!



Reporting: Summary

How are Agent Scores Calculated?

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

10 points	<ul style="list-style-type: none"> Appointment - agent message has the word 'appointment' in it Contact information received
5 points	<ul style="list-style-type: none"> Visitor message received - points every time a visitor responds
1 point	<ul style="list-style-type: none"> For Attachments - sent any item from the Glove Compartment

Training Sandbox Summary Jul 29, 2021 - Oct 26, 2021

Date Range: [Today](#) [Yesterday](#) [Last 7 Days](#) [Last 30 Days](#) [Last 90 Days](#) [Custom](#) Team: Location:

53

Total Chats

53

Answered

8

Interactive Chats

0

Missed

23

Leads

100%
interactive conversion

43.4%
conversion

0.3

leads per day

Last 90 Days

100%
Answered

2:41:00
Average Conversation Length

0:05
Average Visitor Wait Time

Conversation Totals

Top Scoring Agents

1st

Joe Smith

91

2nd

Training Agent 1

51

3rd

Alexandra Olczyk

45

4th

Barbara Walters

15

You'll also see Top Scoring Agents.



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

Conversation History Wednesday Oct 27, 2021

Date Range: [Today](#) [Yesterday](#) [Last 7 Days](#) [Last 30 Days](#) [Last 90 Days](#) [Custom](#)

★ You've received 4 leads yesterday, which is a 4 leads per day average.

[Lookup by ID](#) [Download CSV](#)

Location

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 11:36 AM - 11:39 AM	View Details
✓	Pam Williams	Training Sandbox	Sales	Ana Bot, Training Agent 1				Oct 27, 2021	

Filter by Agent ×

Choose an agent to filter by

[CANCEL](#)

[FILTER](#)



Reporting: Conversations History

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

Conversation History Wednesday Oct 27, 2021

Date Range: [Today](#) [Yesterday](#) [Last 7 Days](#) [Last 30 Days](#) [Last 90 Days](#) [Custom](#) [Lookup by ID](#) [Download CSV](#)

★ You've received 4 leads yesterday, which is a 4 leads per day average. Location:

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 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 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)!

Website Conversation Details

Which department can I connect you with?

Sell or Trade In

I'd be happy to help you with that!

Would you like to answer a few questions or tell me the VIN?

Questions

2013

Ford

Focus

What year is your current...

Thanks! What make is it?

Perfect. And what model?

1 Training Sandbox
Sales
ID: 69cdf5tdhnl
Training Agent 1

2 0:03 Wait Time | 1:12 Duration

3 First Name: Pam, Last Name: Williams
Email Address, Mobile Phone: +131212314, Home Phone
Street Address
City, State, Postal Code, Country
SAVE

CRM Notes

CRM: Primary (Sales), Action: Send Lead

4 SEND TO CRM

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.

Live Agent Status

This data refreshes every 60 seconds.

Data is refreshed every 60 seconds

Filter

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



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
1	2	3	4	5	All
Dealership	Name	Chat Time	Source	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

View Details

The screenshot displays the 'Website Conversation Details' interface. On the left, a chat history shows messages from a visitor and a sales representative. The main area shows the current chat with 'Honda Demo' (Sales, ID: dg7r7eygxc, Suzanne Motola). The chat duration is 0:14 (Wait Time) and 0:07:33 (Duration). Below the chat, there are input fields for customer information: First Name (Suzanne), Last Name (Motola), Email Address, Mobile Phone (305 542 312), Home Phone, Street Address, City, State, Postal Code, and Country. At the bottom of the chat area, there are two buttons: 'TAKEOVER CHAT' (highlighted with a red border) and 'SAVE'. A modal dialog titled 'Takeover Conversation' is overlaid on the bottom, asking 'Are you sure you want to takeover this chat?' with 'CANCEL' and 'CONFIRM' buttons. A hand cursor is pointing at the 'CONFIRM' button.

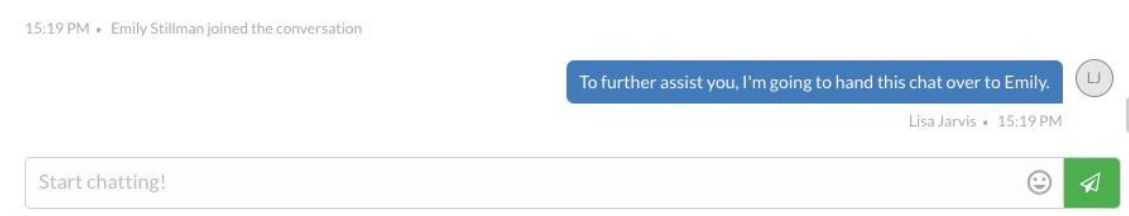


Reporting: Boss Mode

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!"

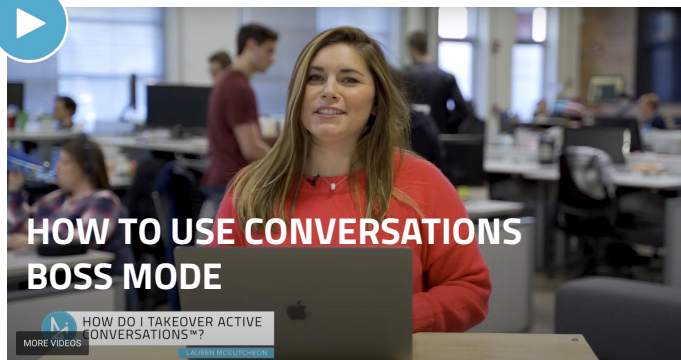
● Move on to the next section

"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

1	2	3	4	5
Name	Phone	Is Admin	Actions	
Alexandra Olczyk		☑	✎	🗑
Barbara Walters		☑	✎	🗑
Daniel Cvengros		☑	✎	🗑
David Cowan		☑	✎	🗑
Ethan Martin		☑	✎	🗑
Jason Biggs		☑	✎	🗑
Josephine Miller		☑	✎	🗑
Katie Unger		☑	✎	🗑



Account Admin: Users

1

ADD 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

Add New User

Account Information

2 Locale

Timezone*

DMS ID

Contact Information

3 First Name*

Last Name*

Email*

4 Phone

Assigned Teams

Select Teams...

- Training Sandbox - Reviews
- Training Sandbox - Sales
- Training Sandbox - Service



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**

The screenshot shows a user profile form with three numbered callouts: 5, 6, and 7. Callout 5 points to a gray box with a cloud upload icon and the text "Drag your image here." Callout 6 points to a toggle switch next to the "Role" field, which is currently set to "Administrator". Callout 7 points to the "SAVE CHANGES" button at the bottom right of the form. The "Cancel" button is visible at the bottom left.



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



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

Manage Locations

<div style="text-align: center;">  <p>ACURA</p> </div> <p style="text-align: center; color: green;">● Acura Demo</p> <p style="text-align: center;">ar... SMS: +14159388915</p> <div style="border: 2px solid green; padding: 5px; margin: 5px 0;"> <p>Teams</p> <p>Sales</p> <p>Service</p> </div> <p style="text-align: center;">Edit Location Settings ▾</p> <p style="font-size: small;">1864 High Grove Naperville, IL 60540</p>	<div style="text-align: center;">  <p>ALFA ROMEO</p> </div> <p style="text-align: center; color: green;">● Alfa Romeo Demo</p> <p style="text-align: center;">alfaromeoem1.dev.dealerinspire.com/ SMS: +16303815276</p> <p>Teams</p> <p>Sales</p> <p>Service</p> <p style="text-align: center;">Edit Location Settings ▾</p> <p style="font-size: small;">1864 High Grove Lane Naperville, IL 60540</p>	<div style="text-align: center;">  <p>ANA BOT</p> </div> <p style="text-align: center; color: green;">● Ana Bot Demo</p> <p style="text-align: center;">conversations.dealerinspire.com/embed/anabot SMS: +17722103404</p> <p>Teams</p> <p>ANABOT TEAM</p> <p>Parts</p> <p>Sales</p> <p>Service</p> <p>Testing Team</p> <p style="text-align: center;">Edit Location Settings ▾</p> <p style="font-size: small;">780 Margie Ln Sandwich, IL 60548</p>
---	---	---

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.

The screenshot displays the 'Conversations' interface. At the top, it shows 'Unknown Visitor' and 'Emily Stillman' (Training Sandbox) with a status of '08:47 waiting on them'. A green box highlights this contact card, and a larger, detailed view of the same card is shown below it. The chat history shows messages from Ana Bot and Emily Stillman. A smartphone screenshot on the right shows a text message from the same contact with a 'Sales' response.

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

Edit Location Settings ▼

Dashboard

Update

Deactivate



Account Admin: Locations

Edit Location

Dealership Information

1

Dealership* Acura Demo

URL* http://acurademo.dev.dealerinspire.com/

Phone* 847-361-5490

Address* 1864 High Grove

City* Naperville

State* IL

Postal Code* 60540

Country* US

Timezone* America/Chicago

Main Contact Information

2

Name* Nicole Huttenberg

Email* no-reply@dealerinspire.com

Settings

Default Glove Compartment Filter Words

Acura

YouTube Channel ID

Language*

English (United States)

Hide Embed When Offline

Use Video Chats

Skip Customization

Require Visitor Information

This option is NOT recommended.

Default Offline Message for Teams*

We're not available right now, but leave us a message and we'll get back to you as soon as possible.

Offline Messages set in the Team Manager will take precedence.



REMOVE

CHANGE

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

Edit Location

Dealership Information

Dealership* Acura Demo

URL* http://acurademo.dev.dealerinspire.com/

Phone* 847-361-5490

Address* 1864 High Grove

City* Naperville

State* IL

Postal Code* 60540

Country* US

Timezone* America/Chicago

Main Contact Information

Name* Nicole Huttenberg

Email* no-reply@dealerinspire.com

Settings

Default Glove Compartment Filter Words
Acura

YouTube Channel ID

Language*
English (United States)

Hide Embed When Offline

Use Video Chats

Skip Customization

Require Visitor Information
This option is NOT recommended.

Default Offline Message for Teams*
We're not available right now, but leave us a message and we'll get back to you as soon as possible.

Offline Messages set in the Team Manager will take precedence.

ACURA

REMOVE CHANGE

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.

The screenshot displays the 'Manage Teams' interface. At the top right, there is a 'Teams' header with a group icon. Below it, three team cards are visible: 'Reviews', 'Sales', and 'Service'. Each card has a 'Training Sandbox' label and an 'Edit Team Settings' dropdown. The 'Agents' section for each team lists several users with a pencil icon for editing. A green box highlights the pencil icon in the 'Reviews' team's 'Agents' section.

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

The screenshot shows the 'Edit Agents on Reviews' dialog box. It contains a list of user names with X icons for removal. A green box highlights the X icon next to 'Katie Unger', and a mouse cursor is pointing at it. The dialog also has 'CANCEL' and 'SAVE' buttons at the bottom right.



Account Admin: Teams

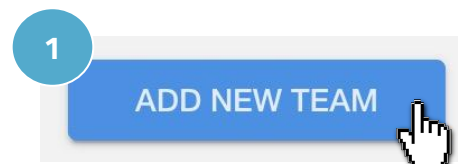
How to Create a New Team

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



Add New Team

Team Details

Name*

Location*

Offline Message

Internal Only

Hide from Team Selection

Main Contact Information

Name*

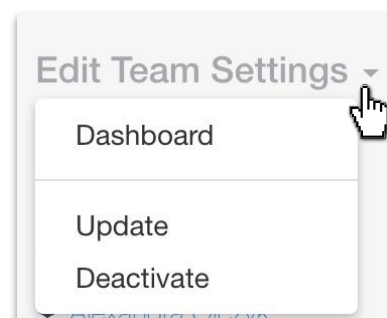
Email*





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



Hours			
Edit Team			
Days	Start Time	End Time	Actions
Mo Tu We Th Fr	9:00am	5:00pm	 

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

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

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.



Account Admin: Teams

Closed Dates

Edit Team

NEW

IMPORT HOLIDAYS

Date	Actions
Dec 25, 2022	<div style="border: 2px solid green; display: inline-block; width: 20px; height: 20px; background-color: #f00; border-radius: 50%;"></div>

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 of your holidays you want to import selected
- Click the trash can icon to delete an existing closed date

March 2022
April 2022

Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
27	28	1	2	3	4	5	27	28	29	30	31	1	2
6	7	8	9	10	11	12	3	4	5	6	7	8	9
13	14	15	16	17	18	19	10	11	12	13	14	15	16
20	21	22	23	24	25	26	17	18	19	20	21	22	23
27	28	29	30	31	1	2	24	25	26	27	28	29	30

NEW

Import Holidays

- Daylight Saving Time starts - Mar 13, 2022
- St. Patrick's Day - Mar 17, 2022
- Easter Sunday - Apr 17, 2022
- Tax Day - Apr 18, 2022
- Easter Monday - Apr 18, 2022
- First Day of Asian Pacific American Heritage Month - May 1, 2022
- Cinco de Mayo - May 5, 2022
- Mother's Day - May 8, 2022
- Memorial Day - May 30, 2022
- First Day of LGBTQ+ Pride Month - Jun 1, 2022
- Juneteenth - Jun 19, 2023
- Independence Day - Jul 4, 2023
- Labor Day - Sep 4, 2023
- First Day of Hispanic Heritage Month - Sep 15, 2023
- Columbus Day - Oct 9, 2023
- Indigenous Peoples' Day - Oct 9, 2023
- Halloween - Oct 31, 2023
- First Day of American Indian Heritage Month - Nov 1, 2023
- Daylight Saving Time ends - Nov 5, 2023
- Election Day - Nov 7, 2023
- Veterans Day (substitute) - Nov 10, 2023
- Veterans Day - Nov 11, 2023
- Thanksgiving Day - Nov 23, 2023
- Native American Heritage Day - Nov 24, 2023
- Christmas Eve - Dec 24, 2023
- Christmas Day - Dec 25, 2023
- New Year's Eve - Dec 31, 2023

CANCEL

SAVE

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

Cancel

SAVE CHANGES

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.



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!

Manage Hotkeys ADD NEW HOTKEY

Location Filter

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**

1

ADD NEW HOTKEY



New Hotkey

Hotkey Information

2 HotKey Name*

3 Location*

4 Category*

5 Hotkey*

Favorite

6 Text*

Cancel **7 SAVE CHANGES**

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

Hotkey Favorite

Webinar Registration ★

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."

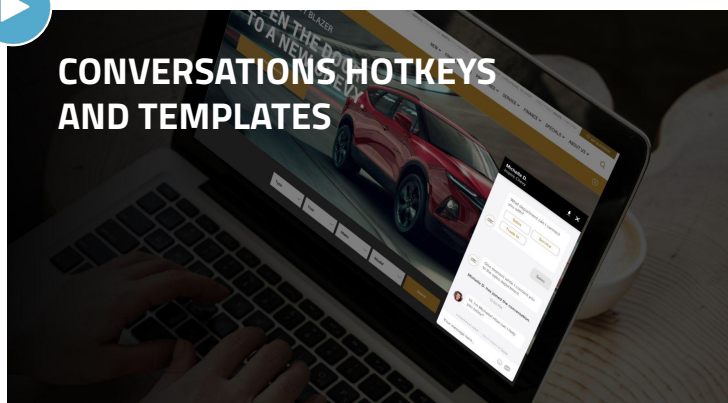
It might be good to review what you missed

"I missed most, if not all of them."

Review the content linked above



CONVERSATIONS HOTKEYS AND TEMPLATES



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

Glove Compartment				ADD NEW ITEM
Location		All Locations	Filter	
Location	Name	Message	Actions	
Training Sandbox	Conversations Hotkeys	Our top Hotkeys to be using	UPDATE	UPDATE
Training Sandbox	Conversations Checklist	How to make sure you receive chats	Update	UPDATE
Training Sandbox	Conversations Training Guide	This is an interactive guide to assist Conversations Training	Deactivate	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



New Content

Generic Content Information

Location*

Name*

Message

Attachment No file chosen

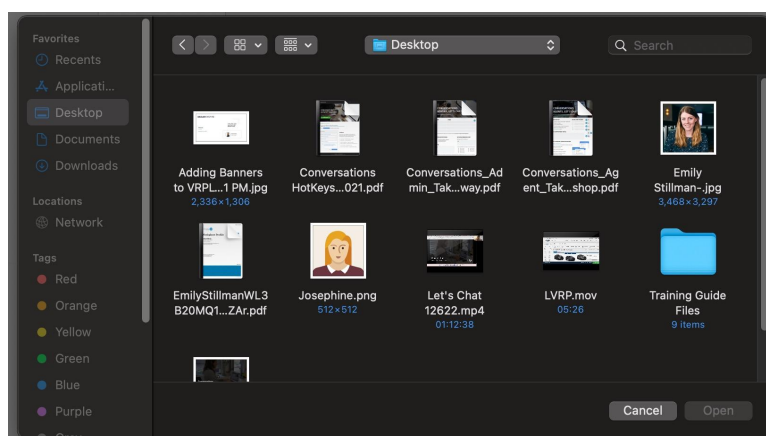
Cancel

SAVE CHANGES

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

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://alfaromeocoem1.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





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 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 ▼

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 conversationsupport@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.

Managed Chat Settings

Managed Chat Settings

Managed Chat Policies

NEW

Name	Enabled	Actions
Always Rollover	<input checked="" type="checkbox"/>	UPDATE ▼

Call Center Messages

NEW

Subject	Date Sent	Actions
No messages found.		

Team Policy Assignment

Team	Policy/Team Assignment
Reviews Training Sandbox	Policy <input type="text" value="None"/> Call Center Team <input type="text" value="None"/>
Sales Training Sandbox	Policy <input type="text" value="None"/> Call Center Team <input type="text" value="None"/>
Service Training Sandbox	Policy <input type="text" value="None"/> Call Center Team <input type="text" value="None"/>

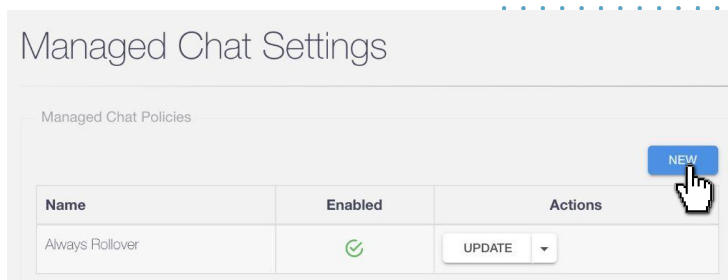


Account Admin: Managed Chat

How to Add a New Managed Chat Policy

To add a new rule...

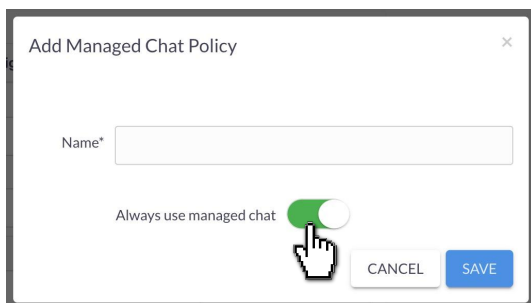
1. Click New
2. Give your rule a Name
3. Toggle the appropriate switches to build your rule as you wish



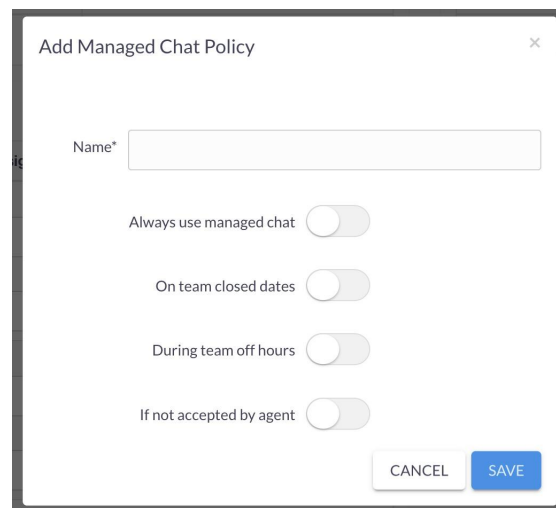
Toggles:

- **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

Add Managed Chat Policy

RULE 1: HOLIDAYS

Name* Holidays

Always use managed chat

On team closed dates

During team off hours

If not accepted by agent

CANCEL SAVE

Add Managed Chat Policy

Name* Off Hours

Always use managed chat

On team closed dates

During team off hours

If not accepted by agent

CANCEL SAVE

RULE 2: OFF HOURS

Add Managed Chat Policy

Name* Rollover

Always use managed chat

On team closed dates

During team off hours

If not accepted by agent

After 30 seconds

CANCEL SAVE

RULE 3: ROLLOVER*

Add Managed Chat Policy

Name* 100% Managed Chat

Always use managed chat

CANCEL SAVE

RULE 4: 100% MANAGED CHAT

*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

UPDATE

Update

Disable

Deactivate





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 Training Sandbox	Policy <input type="text" value="None"/>  Call Center Team <input type="text" value="None"/>
Sales Training Sandbox	Policy <input type="text" value="None"/> Call Center Team <input type="text" value="None"/>
Service Training Sandbox	Policy <input type="text" value="None"/> Call Center Team <input type="text" value="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.

Call Center Messages

Subject	Date Sent	Actions
Closed for August Long	April 9, 2018	 
Service Saturday Hours	May 28, 2019	 
Service	September 17, 2019	 
Use FOR Service greeting	March 16, 2020	 
Trade In Chats	July 9, 2020	 
Sales Pricing	August 18, 2020	 
Sharing Staff Information	October 6, 2020	 
ALL CHATS	November 24, 2020	 
Trade-in evaluation link	February 10, 2021	 
Sales Event	August 23, 2021	 

← 1 2 →

Send Message to Call Center

Location

Expires

Subject*

February 2022

Su	Mo	Tu	We	Th	Fr	Sa
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	1	2	3	4	5

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!"

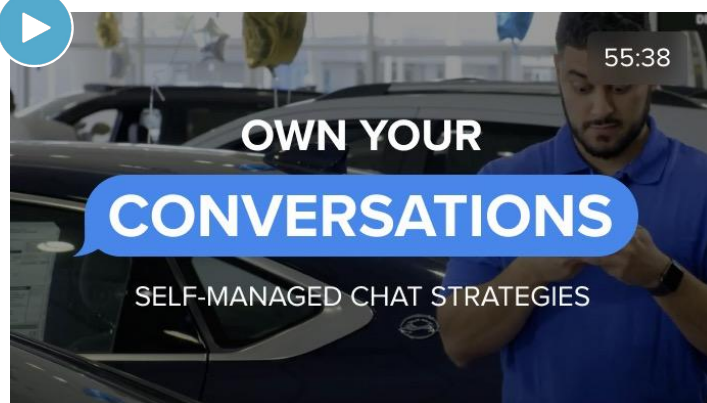
Move on to the next section

"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



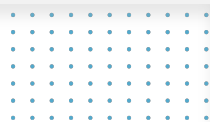


Account Admin: Visitor Experience



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.

Visitor Experience



Button

Welcome Screen

Chat Window

Other Settings

Legacy

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!

Language Select

English

Location Select

Training Sandbox





Account Admin: Visitor Experience



Preview

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

The image displays two side-by-side panels, each representing a different state of the Account Admin interface. The left panel is titled 'Button Settings' and contains several configuration options. The 'Primary Color' option is highlighted with a green box and shows a blue color swatch with the hex code #4a90e2. Below it, the 'Primary Color Text' is set to rgba(255, 255, 255, .87). The 'Embed Position X' is -16 and the 'Embed Position Y' is 16. The right panel is titled 'Preview' and shows a blue chat icon in the bottom right corner, also highlighted with a green box. A downward arrow between the two panels indicates a transition. The bottom panel shows the 'Primary Color' updated to orange (#f5a623) and the 'Preview' window showing an orange chat icon, demonstrating that the changes are reflected in real-time.

Example Shown Above: Updated Primary Color immediately displays in Preview



Visitor Experience: Button

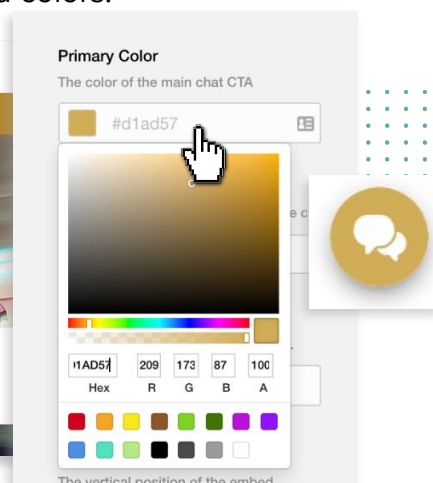
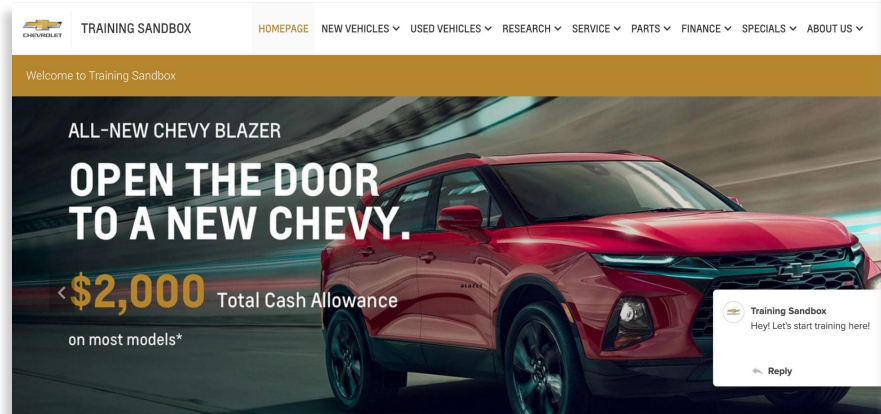


Josephine wants to change the color of the CTA button and how that looks for shoppers on her website. The Button tab under Visitor Experience takes admins to Button Settings, where admins can customize details that determine how the chat looks and feels for shoppers.

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!

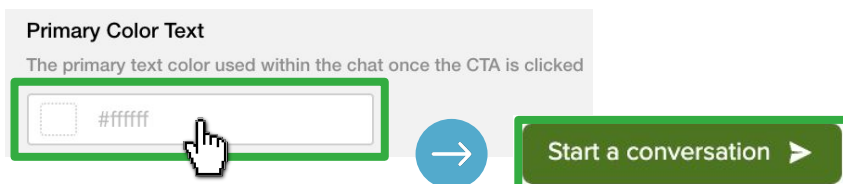


Primary Text Color

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

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



CALL TO ACTION

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

Embed Position X

The horizontal position of the embed.

-16

Embed Position Y

The vertical position of the embed.

16

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!"

Proactive Messages

Proactive Message

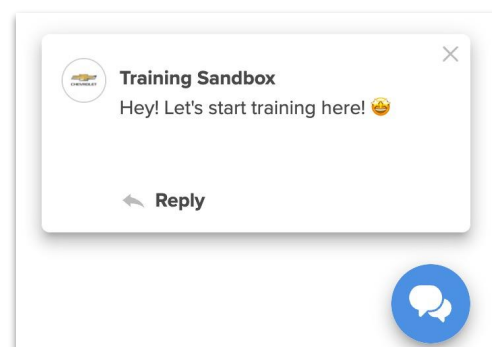
Custom Pop-up Message used throughout the website

Hey! Let's start training 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

Popup Delay

The proactive message will appear after this many seconds



Cooldown

The proactive message will reappear after this amount of time

Cancel

SAVE CHANGES

Last edited by Emily Stillman on 11/10/2021 at 2:28 PM



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!



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.

Welcome Screen Form

Start Card

This is the card that will get the user to start a conversation

We're here to coach you throug

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.

Preview

The preview window displays a chat interface with two cards:

- Start Card:** A card with a Chevrolet logo, the text "Training Sandbox", "We're here to coach you through a Conversation!", and a blue button labeled "Start a conversation" with a right-pointing arrow.
- Welcome Card:** A card titled "Training Video" with the text "This is an example to show how videos play in chat screen!". Below the text is a video player showing a grid of video thumbnails. The central thumbnail is titled "The Training Bunch" and shows a group of people. The video player includes a play button, a progress bar showing "0:00 / 0:24", and volume and full-screen icons.

Featured Content

Add some cards to customize your welcome screen. Videos, financing offers, or location and hours are a few examples of content.

✕ Training Video

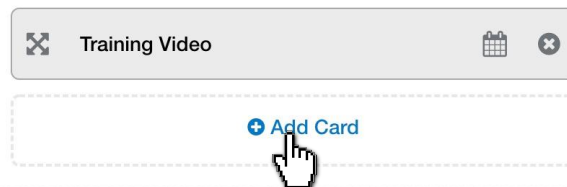
+ Add Card



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	+

Location: All Locations Filter:

Displaying Page 1 of 1

[+ Create Featured Content](#)

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

Training Video

+ Add Card

+ Create Featured Content

NAME
MESSAGE
[View more info](#)



Generic Content Information

Location*

Name*

Message*

URL

Attachment
Files are limited to 100mb in size. Supported image types are jpg, png, and gif. Supported video file type is mp4.

Cancel

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 see the text: [View more info](#). This is also hyperlinked to give your shopper the cue to click!

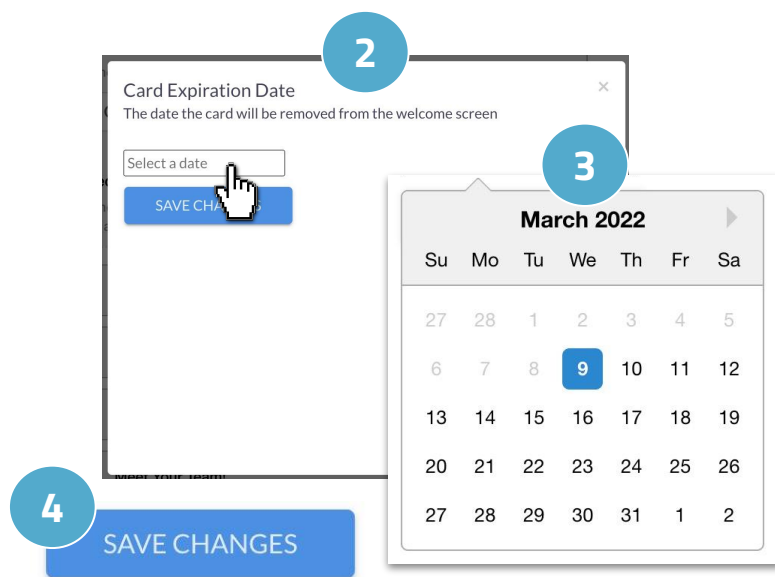
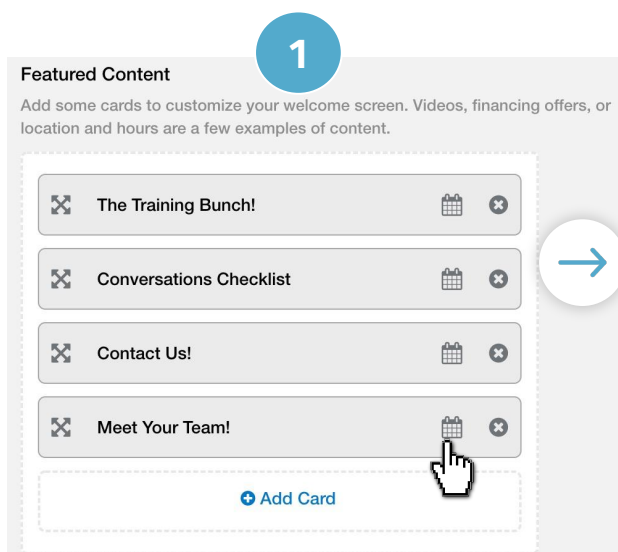
4. Click **Save Changes**



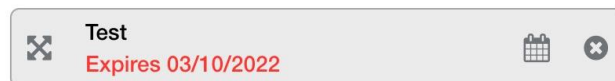
Visitor Experience: Welcome Screen

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

The diagram shows two panels of the 'Featured Content' section. The left panel shows the initial order of cards: 'The Training Bunch!', 'Conversations Checklist', 'Contact Us!', and 'Meet Your Team!'. A hand icon is shown hovering over the 'Meet Your Team!' card. A blue arrow points to the right panel, which shows the result after the 'Meet Your Team!' card has been moved to the second position, below 'Conversations Checklist'. The 'Contact Us!' card is now in the third position. Both panels include an 'Add Card' button at the bottom.

Featured Content
Add some cards to customize your welcome screen. Videos, financing c
location and hours are a few examples of content.

- The Training Bunch!
- Conversations Checklist
- Contact Us!
- Meet Your Team!

+ Add Card

Featured Content
Add some cards to customize your welcome screen. Videos, financing c
location and hours are a few examples of content.

- The Training Bunch!
- Conversations Checklist
- Meet our Team!
- Contact Us!

+ Add Card

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

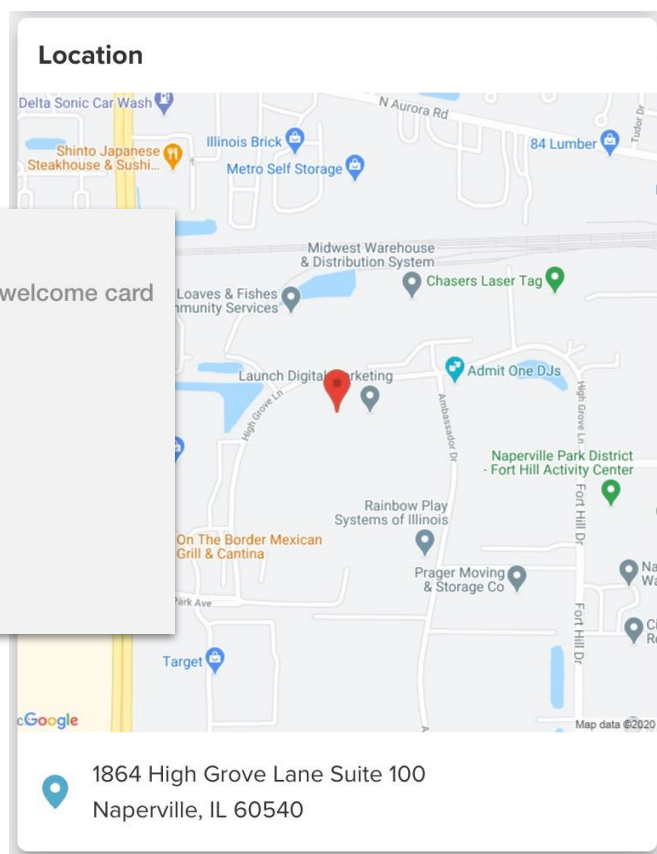
Show map

Show the map welcome card. There needs to at least one other welcome card added for the map card to be shown

Enabled

Cancel SAVE CHANGES

Last edited by Josephine Miller on 02/17/2022 at 2:48 PM



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!

Chat Window Appearance

Top Title

The title that appears in the top left corner of the chat

Cancel

SAVE CHANGES

Last edited by Josephine Miller on 02/17/2022

Live Chat



Welcome to Training Portal



Training Portal

Let's Chat!

Start a conversation ▶

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.

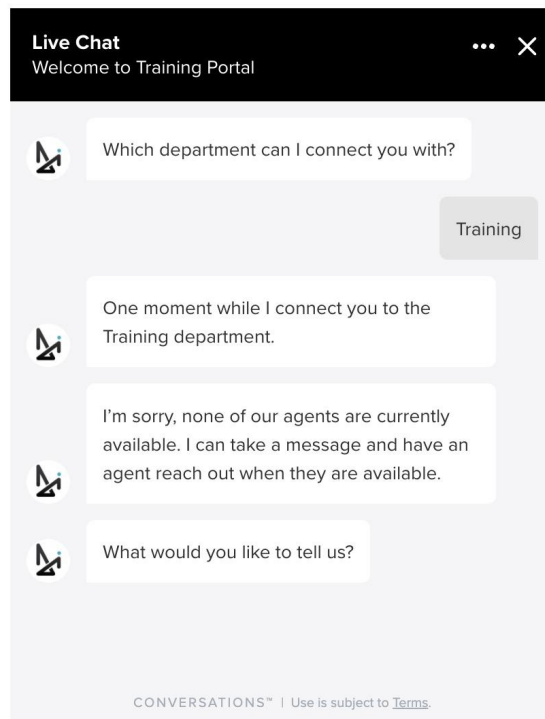
If Ana Bot is disabled, it will just ask for a message without collecting information.

Other Settings Form

Enable Ana Bot

Enable Ana Bot for chats with one team in order to skip team selection and for clients using Trade Pending and CTAs triggering Bot Flows

Disabled



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 a text

Enter your information, and our team will text you right away.

Mobile Phone

Your message here...



SEND TO MOBILE

Send to Mobile

Allow the user to continue the chat through SMS



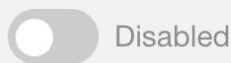
Send to Mobile

Allow the user to continue the chat through SMS



Send to Mobile(Long Form)

Allow the user to continue the chat through SMS, require more detail



Your message here...



<
SMS Send a text

Enter your information, and our team will text you right away.

First Name

Last Name

Mobile Phone

Message

Submit

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.

Leave a Message Form

Allow the visitor to leave a message via form. This will replace AnaBot's leave a message flow.

Disabled

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**.

< Leave a Message

Dealership Department

Training

First Name *

Last Name *

Email *

Mobile Phone

Message *

Submit

CONVERSATIONS™ | Use is subject to [Terms](#).





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 to send custom events for a location to listen to.

Z-Index

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

Lead Gate

Have Ana Bot capture the visitor's lead information prior to escalating the chat to an agent

Disabled

Enable Custom Analytics

Allow the Conversations Embed to send custom events for a location to listen to

Disabled

Z-Index

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.





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.

DDC CTA Text

Text to show on a Dealer.com CTA

DDC CTA Action

Action for a Dealer.com CTA

Custom CSS

Add your own css to change the styles of the embed

Cancel

SAVE CHANGES

Last edited by Josephine Miller on 02/17/2022 at 2:48 PM



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

Legacy Settings

CTA Type

CTA Text

Position

Survey Type
This is the type of theme that will display

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


Disable AudioEye Script

Prevents AudioEye from loading in v3 when it has already been loaded on the website

Disabled

Custom Icon

 Choose a file



CTA Theme

Cancel

Last edited by Josephine Miller on 02/17/2022 at 2:48 PM





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

BE WHERE YOUR SHOPPERS ARE

Great to see you again, Kara. Anything I can help with?

You can say something like "I'd like to schedule a test drive," or if you want to speak to a human, just say "Agent," but of your way.

Hi! I'd like to schedule a test drive.

I'd be happy to help you setup a test drive.

2018 Honda Fit LX
MSRP \$17,000

What day and time would work best for you?

ANA BOT CONVERSATIONSSM A.I.

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!

