



CONVERSATIONS

Agent Training Guide



WELCOME TO CONVERSATIONS!

As an Agent of Conversations, we want to provide you with the toolkit needed to successfully answer chats. This Training Guide will assist you in the why, the what, and the how in working as an Agent answering chats 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 want 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 Summary

Look for our How-To's 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 THE TITLES TO NAVIGATE TO THAT SECTION

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Logging in to Conversations

DEALER INSPIRE

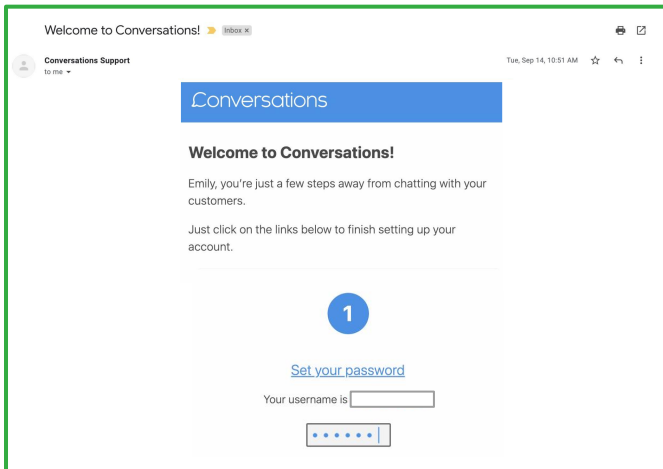


Meet Joe! Joe is a new dealer at his Dealership, DI Motors, and has just been set up with a login for Conversations.

We'll walk Joe 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!



Setting up to Receive Chats

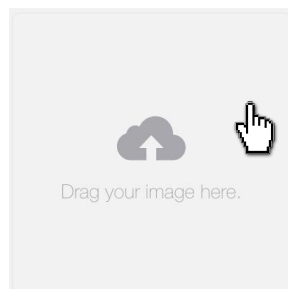
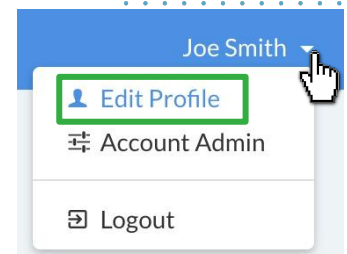
DEALER INSPIRE



Joe is now logged in to Conversations! 🎉

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

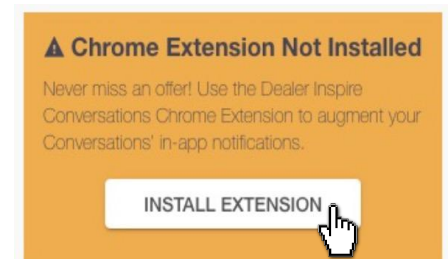
1. Click your name in the upper right-hand corner and select **Edit Profile**
2. Upload a picture of yourself by dragging and dropping an image from your desktop or by clicking the image and uploading from your computer



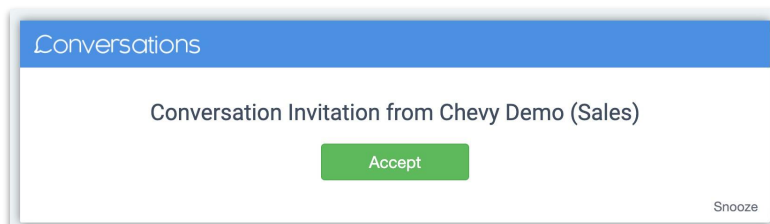
Recommended Image Size

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




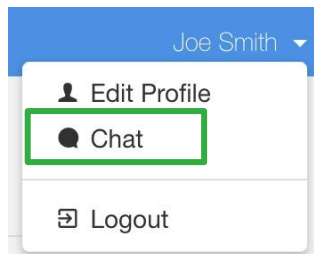
Once you see **Extension Installed** you're all set to receive notifications like the one below, when customers are looking to chat on your site:



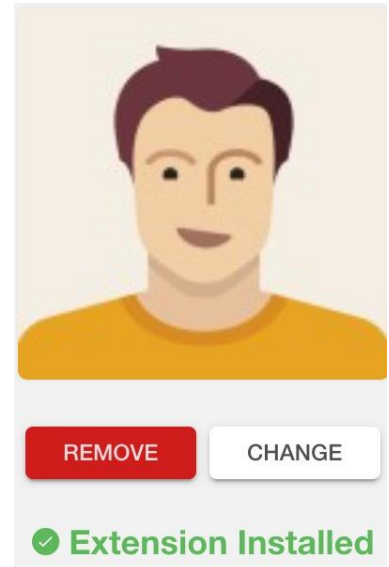
Setting up to Receive Chats

DEALER INSPIRE




5. Once your picture is uploaded and you see the Extension Installed like Joe 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're still not receiving chats, ask an Admin to check:

1. That you're 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!

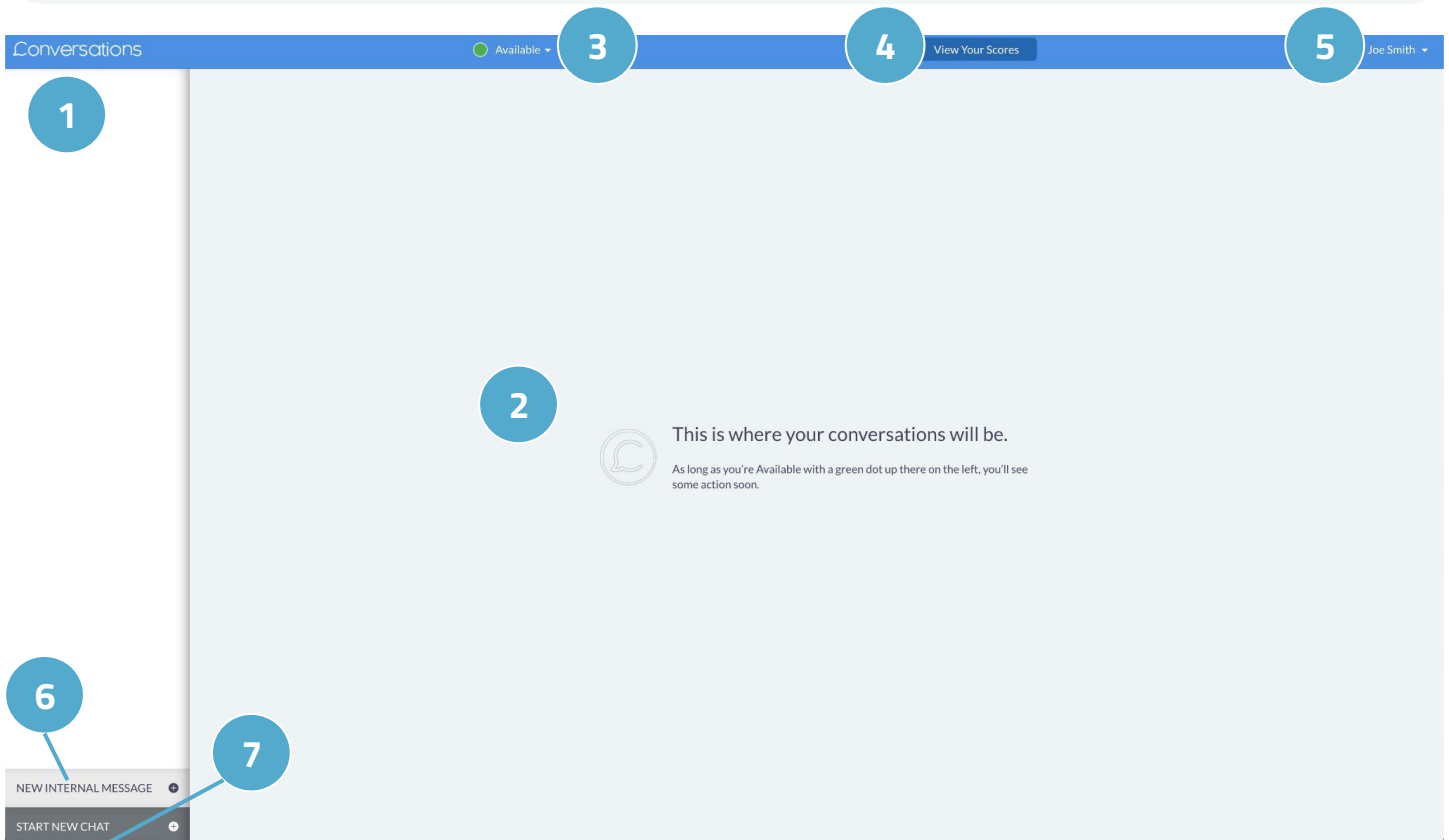


The Conversations Dashboard

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Joe is logged in, set up his profile, and is set to receive chats. Now he needs a quick tour of the Conversations Dashboard before he gets to answering chats!



1. **The Side Chat Bar** - This is where your incoming and current chats will be listed
2. **Customer Chat Window** - When you click into a chat (1), you will be able to interact with the customer here
3. **Status Bar** - Set your availability here
4. **View Your Scores** - See how your points compare to other Agents
5. Click **Your Name** to Toggle between views in Conversations
6. **Internal Message** - Start an Internal Message between you and another Agent/Admin
7. **Outbound SMS** - Follow up on a previous chat or add a new contact to follow up on a lead from another source

Now we'll go into each section a bit more in depth.



Side Chat Bar and Customer Chat Window

DEALER INSPIRE

The screenshot displays the Dealer Inspire interface. On the left is the 'Conversations' side chat bar, which lists three chat sessions: 'Unknown Visitor Chevy Demo' (16:11 waiting on them), 'Unknown Visitor Chevy Demo' (43:23 waiting on them), and 'Aman Sengar Hyundai Demo' (00:15 waiting on you). The main chat window is titled 'Unknown Visitor' and shows a conversation with 'Ana Bot'. The chat history includes messages from 'Emily Stillman' and 'Ana Bot' at 13:29 PM and 9:50 AM. The chat window also displays a 'Start chatting!' button and a search for vehicles section. The search results show four vehicles: 2019 Chevrolet Silverado 1500 LT Trail Boss, 2019 Chevrolet Corvette Grand Sport 1LT, 2019 Chevrolet Equinox LS, and 2019 Jeep Wrangler Unlimited Rubicon. On the right side of the chat window, there is a form for 'Unknown Visitor' with fields for First Name, Last Name, Email Address, Mobile Phone, and Home Phone. Below the form is a 'CRM Information' section with a 'Notes' field and a 'More Information' section with two circular timers: '16:11 Time Chatting' and '3646:15:49 Time on Site'.

1. The Side Chat Bar

New chats that have not been accepted yet will appear in green (shown above). You will see...

- If the customer name is available, or if the agent has collected that information, it will display on each tab. If no information is available it will be labeled **"Unknown Visitor."**
- If you have multiple locations, you will be able to identify what site the customer is coming from.
- Each customer has a timer underneath their location. If you are waiting on them, it will show you how long you have been waiting for. If the customer is waiting for you to answer, the timer will change from **grey** to **red** and a second notification will pop up after the customer has been waiting for 1 minute.
- An icon telling you how they're viewing your site, whether on desktop or on mobile

2. Customer Chat Window

When you click into a chat on the left, the chat screen will populate in the center screen.



Status Bar, Scores, and Name

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3

- Available
- Away
- Do Not Disturb

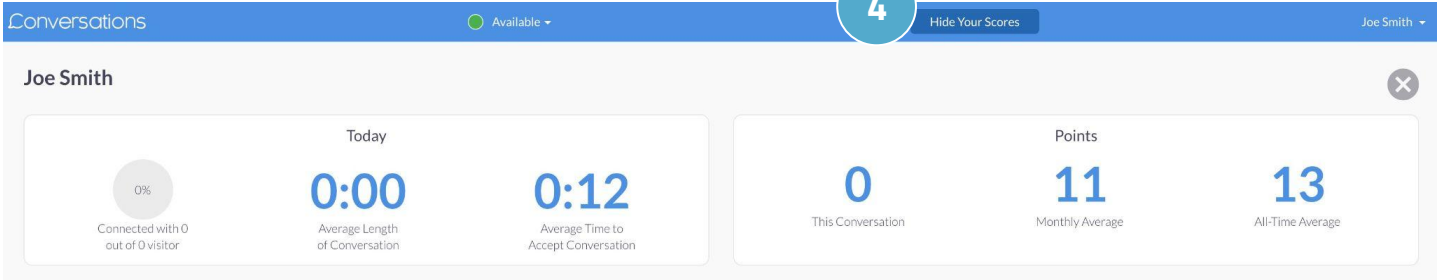
3. Status Bar

Available → You will receive all incoming chats/transfers

Away → You will only receive internal transfers

Do Not Disturb → You will block all incoming chats

4



4. View Your Scores

Keep track of your Scores, and don't be afraid to get competitive!

View Your Scores will show you...

- the percentage of visitors you've connected with
- the average length of your Conversations
- the average time to accept Conversations
- your points for...
 - this Conversation
 - the month (on average)
 - all time (on average)

5. Click **Your Name** to toggle between:

- Your Chat Screen
- Profile
- Account Admin
- Logging Out

5

Joe Smith ▾

- Edit Profile
- Account Admin
- Logout

How are Agent Scores Calculated?

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



New Internal Message

DEALER INSPIRE

The screenshot displays the Dealer Inspire interface. On the left, a chat window titled 'Unknown Visitor' shows a conversation with 'Ana Bot'. The chat history includes messages from 'Emily Stillman' and 'Ana Bot'. A 'Sales' button is visible. Below the chat, there is a search bar for vehicles and a list of vehicle models. On the right, a sidebar contains a search bar and a list of team members. A green box highlights the 'NEW INTERNAL MESSAGE' button in the bottom left corner and the team member list on the right.

6 NEW INTERNAL MESSAGE

Search

- Adrian Reyes-Alicea
- Akin Oni-Orisan
- Alana Erickson
- Alec Seperack
- Alecia Wilson
- Alex Drath
- Alex Fernandez
- Alexis Dirks
- Alyssa Haygood
- Andrew Hernandez
- Angelica Payton
- Ann Larson
- Anthony Rizzo
- Barrett Morrill
- Bernicia Williams
- Bobby Keim
- Brandon Ford
- Brent Williams

6. New Internal Message

Internal messaging resides in the bottom left corner.

To initiate a new internal message, just search for a team member in the list and click on their name.

You will quickly be able to see who is **Available**, **Away**, in **Do Not Disturb**, and who is offline (grayed out).

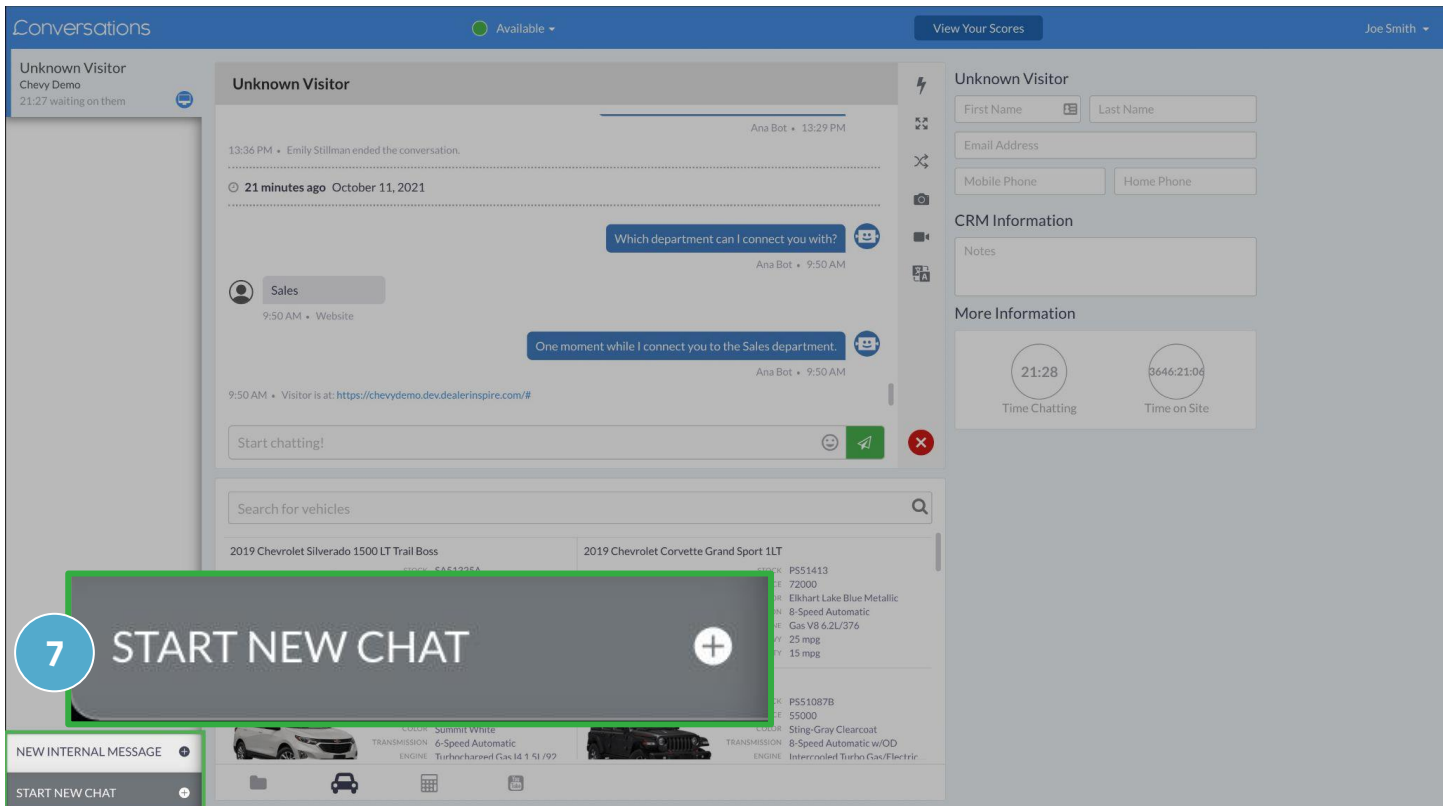
The chat will show up in your Chat Window, and you will have access to the following tools during your 1-on-1 chat: Hotkeys, Upload an Image, and In-Chat Translation (shown right).

(For more information on what these tools do, check out our section on the [Chat Toolbar](#)).



Outbound SMS

DEALER INSPIRE



7. Outbound SMS

Outbound SMS allows you to initiate text message Conversations with your customers, straight from Conversations on desktop or mobile.

The customer will receive a standard opt-out text, but otherwise it will work just like a typical Conversations chat. You and your team can use all of the same features and tools that you would in a regular chat.



How-To Send an Outbound SMS

1. Start New Chat
2. Select or Create Customer
3. Choose a Department to send the text from
4. Type and Send Your Message



Best Practice

1. Have a phone number for a customer from another source? Create the lead and follow up directly in Conversations!
2. Use Outbound SMS + Hotkeys to ask sold customers for reviews!

For a more in-depth how-to, see the next page...

Outbound SMS

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How-To Send an Outbound SMS

1. From the Chat Screen, select Start New Chat
2. Select Your Customer
 - a. If the customer is already a contact in Conversations, you can simply search for their name, and then click “New Text.” (See A below)
 - b. If the customer is not yet in the list, click “Create New Customer” and add in the customer’s contact information to start a new chat. (See B below)

Emily Stillman
Training Sandbox
00:15 waiting on them



Prospective Customer

Prospective Customer

NEW TEXT

Sales Training Sandbox

Service Training Sandbox

lzimmer@dealerinspire.com

CREATE CUSTOMER

A

First Name

Last Name

Phone

Email

Country

United States

SAVE

Cancel

B

3. After you’ve clicked “New Text,” you will be prompted to choose the department that your message is regarding. (Shown above in A)
4. Next, type and send your message. This will bring you to the chat screen, so you can continue chatting and sharing resources with the customer.

All the usual Conversations tools are available to you, except for Live Video because your visitor can’t engage in live video through SMS.

- There will be a standard **“Opt Out” message** sent to your customer, as in the following example:
- If the customer chooses to opt out of the texts, you will receive an error message if you attempt to message them again in the future.

Get things started!

Send a message to Emily Stillman from Sales.

Enter your message here

Hi there. This is a message from Inspire Toyota Demo. Msg & data rates may apply. Reply STOP to stop all messages.

Hello! Your car is ready for pick up!



Answering a Chat

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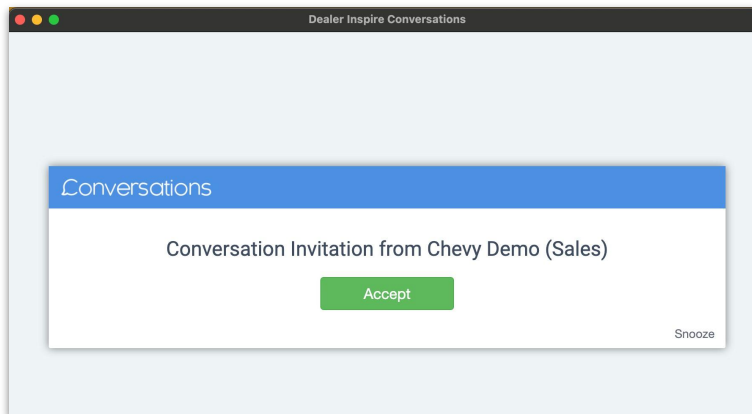
Joe feels pretty comfortable navigating the Conversations Dashboard, and is now ready to receive chats.

Let's take a look at the process of answering a chat now that a customer → is looking to chat on the DI Motors website!



The customer will be greeted by a basic bot that invites them to choose a team to chat with. This is why being set up as a part of a team is so important!

All available members of the selected team will then receive a notification. Chats are first come, first serve, so the first person to click '**Accept**' will claim the Conversation and begin chatting with the customer.

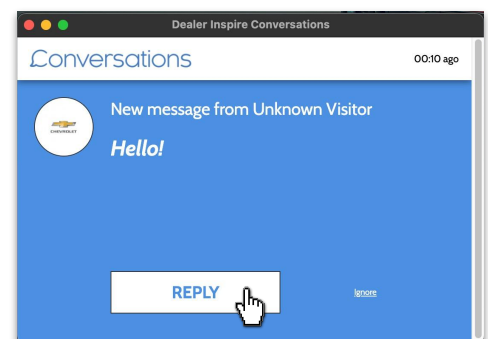
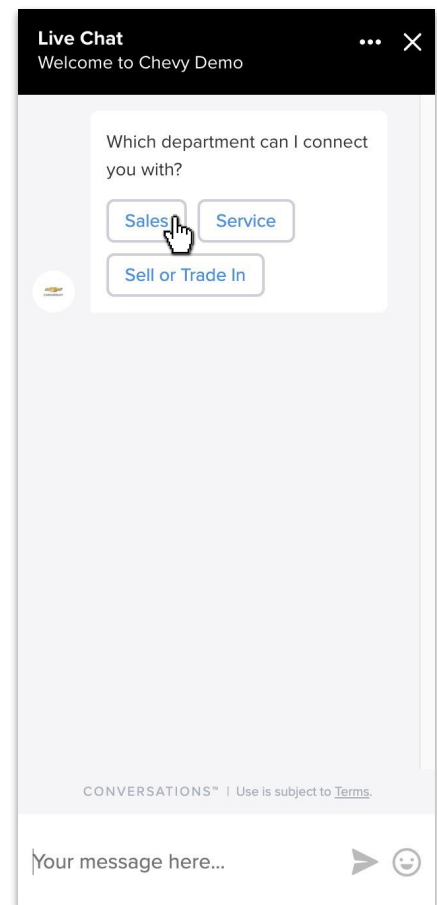


NOTE: It is important to ensure that you have installed your [Chrome Notifications Extension](#), because this will ensure that you receive large pop-up notifications for incoming chats.

REMINDER MESSAGES

This notification will pop up in the bottom right hand corner of the screen after the visitor has been waiting on your response for a minute and every time you receive a new message from the visitor.

This message will appear as a pop-up regardless of what tab you are in.



AnaBot Trade-In Flow

DEALER INSPIRE



Joe notices that on the customer's end they are prompted to choose between the teams that are set up: Sales and Service, but that there is another option for "Sell or Trade In". He wants to know more about what happens when a customer clicks this and is curious when that might lead to a sale!

If the customer chooses the "Sell or Trade In" option, they will be prompted respond how they would like to value that Trade In. The customer can choose to answer questions about their vehicle or simply provide their VIN.

QUESTIONS

AnaBot will ask:

1. What year is your current vehicle?
2. What make is it?
3. What model?
4. What trim?
5. How many miles/kilometers are on it?


Then the customer will be given an estimate (including a link to Trade Pending - Ex: <https://dily.io/co/Mof7TY>) and be asked if they would like to talk to a sales representative.

- If they respond with "yes", an Agent will be notified
- If they respond with "no", the chat will be ended

VIN

If the customer selects to provide the VIN, they will may be asked some additional questions to narrow down the vehicle, but it will provide them with a similar estimate, powered by Trade Pending. They will also be asked, once an estimate is provided, if they would like to speak to a sales representative.

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



Download our Training Guides! ... X
Welcome to Training Sandbox

What year is your current vehicle?

2013

Thanks! What make is it?




Ford

Perfect. And what model?

Focus

The 2013 Ford Focus came in a couple different trims. Which is yours?

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

Your message here...   

Questions Flow Example





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. Incoming chats...
 - a. only go to Admins
 - b. are first come, first served for all Agents on that team
 - c. will be automatically accepted
 - d. are assigned to Agents, round-robin
4. Within Outbound SMS, you can...
 - a. create a new customer within Conversations
 - b. send a text even after a customer opts out
 - c. live video chat
 - d. only message existing customers


REVIEW

What we covered in this section:


[Logging in to Conversations](#)
[Setting up to Receive Chats](#)
[Conversations Dashboard](#)
[Answering a Chat](#)

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


"I got them all right!"

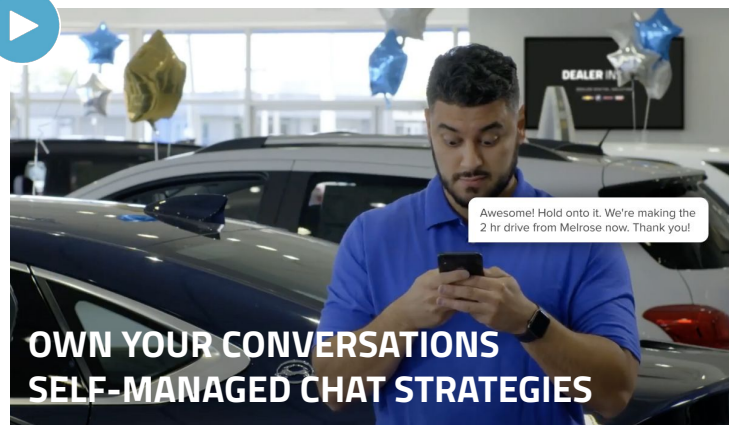
 Move on to the next section

"I missed 1-2."

 It might be good to review what you missed

"I missed 3-4."

 Review the content linked above



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



Chat Toolbar

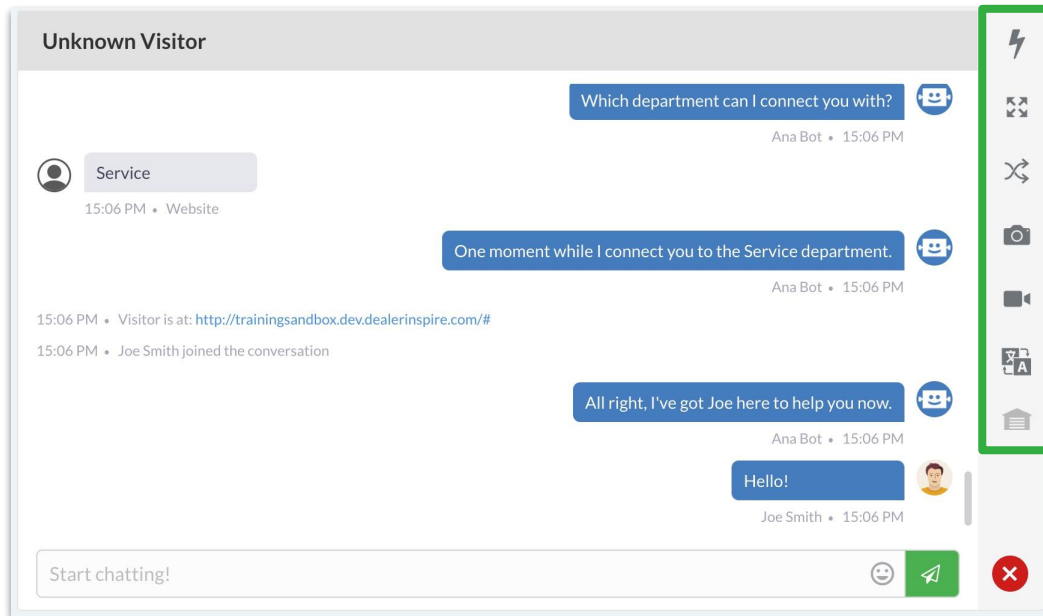
DEALER INSPIRE










Joe is getting better at navigating Conversations and knows how to answer chats. Now, to use all the functionalities Conversations offers, Joe will master the Chat Toolbar.

The Chat Toolbar is comprised of multiple functions to take chats to the next level.

The Chat Toolbar, shown below in green, is located to the right side of the chat conversation and offers 5 functions to increase the efficiency, accuracy, and effectiveness of your chats!



The Chat Toolbar is comprised of:

-  — **Hotkeys**
-  — **Explode to Text**
-  — **Transfer**
-  — **Upload Image**
-  — **Live Chat**
-  — **In-Chat Translation**
-  — **Online Shopper Garage**



Best Practice

Not every tool within the Chat Toolbar will work for every chat!

Establish with your team when to use each one to maximize efficiency!



Chat Toolbar: Hotkeys

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Joe is in a hurry, but wants to stay professional and concise with the customer he's chatting with. He also wants to keep customers from bouncing from DI Motors' site!

In order to ensure quick, accurate, and personable responses, Joe can use the Hotkey function to populate templated responses.

What is a Hotkey?

Hotkeys are templated responses you can use to start a conversation or keep one going. Hotkeys ensure quick response-time and professional, fool-proof starters. These are customizable to fit the needs of the dealership, but must be created by an Admin in the backend.

To Send a Hotkey

1. Click on the Lightning Bolt icon on the Chat Toolbar
2. If there are many Hotkeys, you can search by category or by using keywords
3. Select message to populate it within your chat send bar

The screenshot shows the Dealer Inspire chat interface. On the left, a chat window for 'Pam Williams' is visible, showing a message from 'Sales' at 9:13 AM. The main area displays a list of hotkeys under the 'GENERAL' category. A hand cursor is pointing at the hotkey 'Hello, I'm Joe Smith and I'm here to help you today. Hi'. Below the list, the chat send bar is populated with the selected hotkey text: 'Hello, I'm Joe Smith and I'm here to help you today'. The send bar also includes a smiley face icon and a green send button.



Chat Toolbar: Hotkeys

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A Shortcut to Hotkeys

You can also access Hotkeys by adding a forward slash (/) into the “Start Chatting!” box. Hotkeys will appear above.

Hello, I'm Joe Smith and I'm here to help you today.

Hi = shortcut to type after the forward slash / to search for this Hotkey

Certified	Great! That vehicle is certified. There are many benefits that come with our certified program. Would you like to learn more?
Hi	Hello, I'm Joe Smith and I'm here to help you today.
Huge Selection	We have a huge selection of those vehicles. Check out this link.
Perfect Choice	I have the perfect vehicle for you!
We Can Get It	Even though you don't see it on our lot, we have a few en route and can trade for one even quicker. Would you like the vehicle this week?
Yes, It's Avail...	Awsome! That vehicle is available. Are you available to stop in?

😊
➤

As you begin writing your selected shortcut, options will populate above the chat, shown above.

Click or use the keyboard \updownarrow to select the Hotkey you want to use, then press Send.



How-To Send a Hotkey

Option 1:

1. Select the Lightning Bolt to access Hotkeys
2. Search for your Hotkey
3. Select the Hotkey you want to send

Option 2:

1. Type / in the chat to access Hotkeys
2. Option to type the keyword to pull up your desired Hotkey
3. Select the Hotkey you want to send



Best Practice

Establish Hotkeys that you will use as a team!

Clearly define when each Hotkey should be sent, that way you can effectively handle chats!

Looking for a hot Hotkey? → **Check these out!**



Chat Toolbar: Explode to Text

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Explode to Text offers Joe the ability to quickly and accurately fill in the lead form to the right of the chat box.

Explode to Text is useful for efficiently adding contact information into your CRM lead form while also ensuring accuracy of spelling when adding the name, phone number, and email address.

This feature puts individual boxes over each word. When the box is clicked, a drop-down menu appears.

Click on which category reflects the word in the box:

- First Name
- Last Name
- Email
- Mobile Phone
- Home Phone

Unknown Visitor

13:46 PM • Visitor is at: <https://hondademo.dealerinspire.com/#>

13:46 PM • Joe Smith joined the conversation

All right, I've got Joe here to help you now.

Ana Bot • 13:46 PM

Hello my name is Pam Williams My
 number is 111-111-1111 And the best
 email address is pwilliams@happycustomer.com

Start chatting!

Unknown Visitor

Joe Smith • 8:03 AM

Hello My name is Pam Williams My
 number is 111-111-1111
 pwilliams@pwilliams.com

8:04 AM • Website

First Name
 Last Name
 Email
 Mobile Phone
 Home Phone

Start chatting!



Chat Toolbar: Explode to Text

DEALER INSPIRE

Once clicked in the Chat Window, the fields will automatically populate into the Lead Form to save their contact information.

We clicked the box next to Pam, and selected “First Name”. For Williams, we selected “Last Name”. Note how “Unknown Visitor” turns into “Pam Williams”.

Lead Form

Before

Unknown Visitor

First Name	Last Name
Email Address	
Mobile Phone	Home Phone

CRM Information

Notes

More Information

After

Pam Williams

Pam	Williams
pwilliams@pwilliams.com	
1111111111	Home Phone

CRM Information

Notes

More Information



Best Practice

If you sense the customer is hesitant to share information, continue offering them help for now.

Subtly request later in the conversation that they share information in the case that you might be able provide more assistance to them in the future.



How-To Use Explode to Text

1. Select the Explode to Text icon
2. Select the box to fill into the Lead Form
3. Choose the category of that information (First Name, Last Name, Email, etc...)
4. To close Explode to Text, select the icon once again



Chat Toolbar: Transfer

DEALER INSPIRE



The customer reached out to Joe in Sales, but actually needs to talk with Barbara in Service. Using the Transfer feature, Joe will transfer the chat to Barbara to answer the customer's questions. If he wanted to just loop Barbara into the current conversation, he can do that, too!

When clicking the Transfer button, a list of other agents from your dealership, sorted by department will populate below the chat where the Glove Compartment is located.

- The Agents will be listed by...
 - Dealership (if you have multiple dealerships within your group)
 - Team
- All Agents that are set to Available or Away will appear in this list, under the word **Shout**

By clicking **Shout**, Conversations will send an alert to all available Agents. The first to accept will be looped in!

When you send a Transfer, you will receive a notification in the top, right-hand corner of the screen notifying you that your Transfer Request has been sent. (below)

Transfer Request Sent

Successfully sent transfer request to Barbara Walters. Please wait for their response.

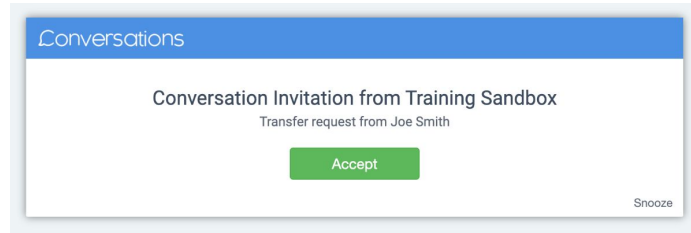
The screenshot displays the Dealer Inspire chat interface. At the top, the contact name is "Pam Williams". The chat history shows a message from the website at 14:47 PM, a status update at 14:48 PM, and a question from "Ana Bot" at 15:12 PM: "Which department can I connect you with?". The response from "Service" at 15:12 PM is: "One moment while I connect you to the Service department." Another status update at 15:12 PM indicates the visitor is at a specific URL. A final message from "Ana Bot" at 15:12 PM says: "All right, I've got Joe here to help you now." Below the chat window, a "Transfer Conversation" panel is visible, showing a list of agents under "Sales" and "Service" departments, with "Shout" and "Barbara Walters" listed under each. A green notification banner at the top left of the chat area reads: "Transfer Request Sent Successfully sent transfer request to Barbara Walters. Please wait for their response."



Chat Toolbar: Transfer

DEALER INSPIRE

The Agent/Agents will be alerted, and prompted to accept the Invitation.

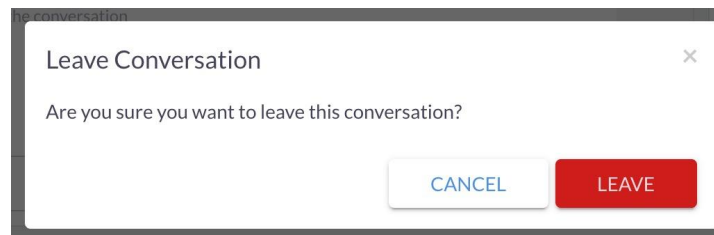


The person who accepts the invitation will be brought into the chat. You will be notified within the chat when someone joins successfully.

14:42 PM • Barbara Walters joined the conversation

Start chatting!

Once the other Agent/Admin joins the chat, you can stay in the 3-way chat, or you can leave by clicking the . When you or the other Agent/Admin leaves, the conversation with the customer will continue as a two-way chat.



The remaining Agent will be notified when the other Agent leaves the chat.

15:46 PM • Joe Smith left the conversation.

Start chatting!



How-To Transfer a Chat

1. Click the Transfer icon
2. Select the Agent to loop them In (or Shout to ping all Agents)
3. They will be notified to join
4. You can leave the Conversations by clicking the red once they join



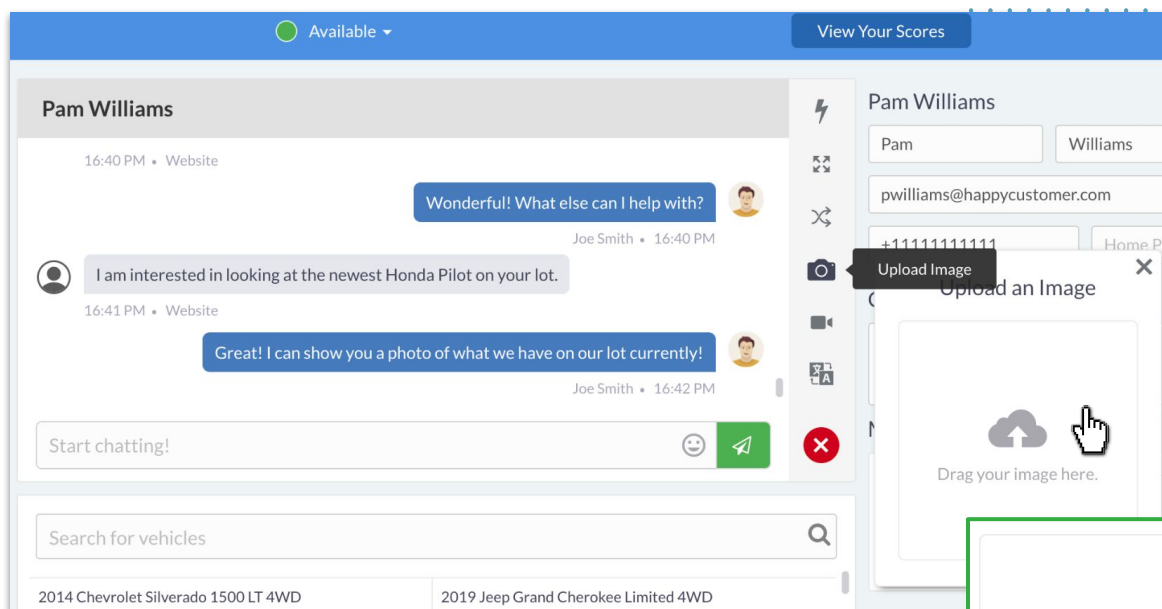
Chat Toolbar: Upload an Image

DEALER INSPIRE

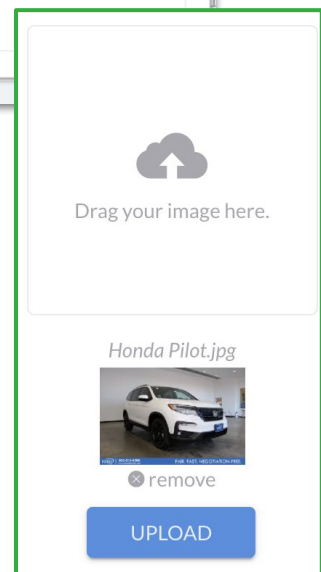


The customer Joe is chatting with requested a photo of a car from the dealerships' lot. Using the Upload an Image feature in the Chat Toolbar, Joe can quickly send a photo directly from his computer, straight to the customer!

1. Click the **Upload an Image** icon to drag a file from your desktop into the box, or click on the box and upload a file from your computer



2. Once the image populates (shown right), click upload
3. The image will attach to the chat (below)
4. Click the green **Send** button



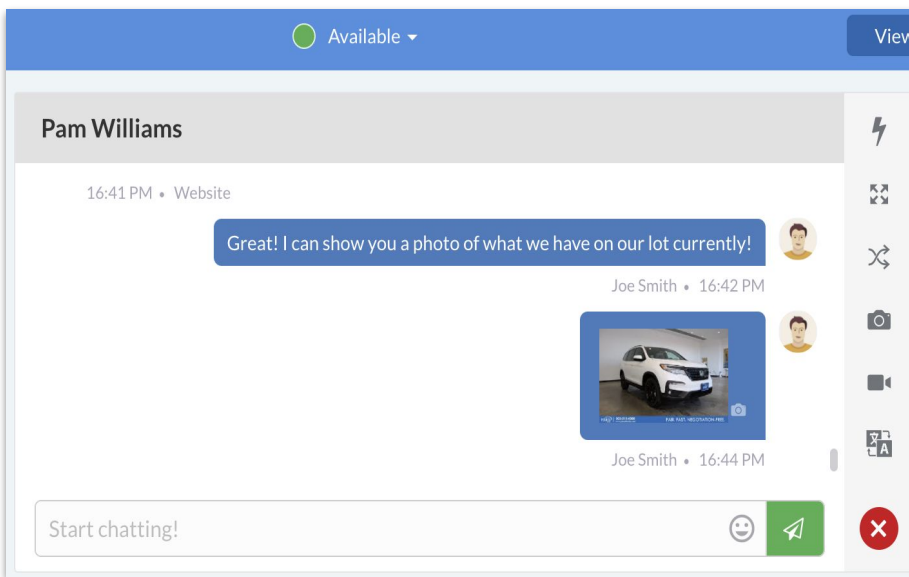
Chat Toolbar: Upload an Image

DEALER INSPIRE

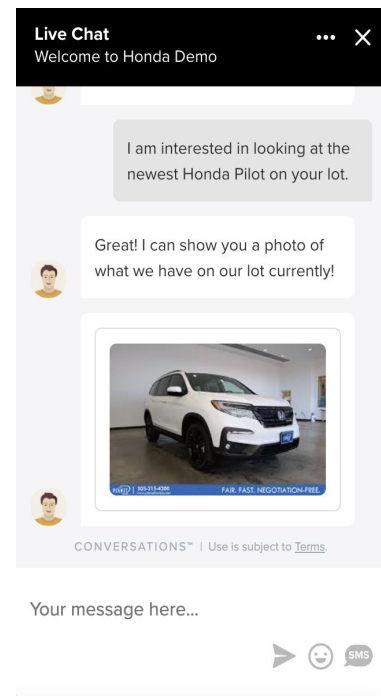
Once this picture is sent, the Agent and Customer will both see the image populate in their chat.

See below for a preview of how images populate in chats.

Agent View



Customer View



How-To Upload an Image

1. Click the Upload an Image icon
2. Drag and drop an image or click to upload from your computer
3. The image will populate
4. Click Upload
5. The image will attach to the chat
6. Send



Best Practice

For images that haven't been loaded into the Glove Compartment by an Admin, using the Upload an Image feature is a great workaround for Agents!



Chat Toolbar: Live Chat

DEALER INSPIRE



Joe can take his conversation to the next level with the Live Chat feature in the Chat Toolbar. Live Chat allows Joe (the dealer) to initiate a live video conversation with the customer. So, Joe can create a more personalized experience with that face-to-face interaction.

1. Click on the **Live Chat** video icon
 - This will open up your video chat to the right and shift the lead form down
2. Click **Request Live Video** (right)
3. The first time you request a live video, you must enable your computer microphone and camera

REQUEST LIVE VIDEO or CANCEL

Unknown Visitor

First Name Last Name

Email Address

+13121231452 Home Phone

CRM Information

Notes

conversations.dealerinspire.com/chat

...ersations.dealerinspire.com wants to

Use your microphone

Use your camera

Block Allow



Best Practice

If the customer is able to, use Live Chat to build that face-to-face connection. 😊

Just because you are communicating remotely does not mean that you can't have a semi-traditional meet and greet! Just ask them if they would like to live video chat with you first!



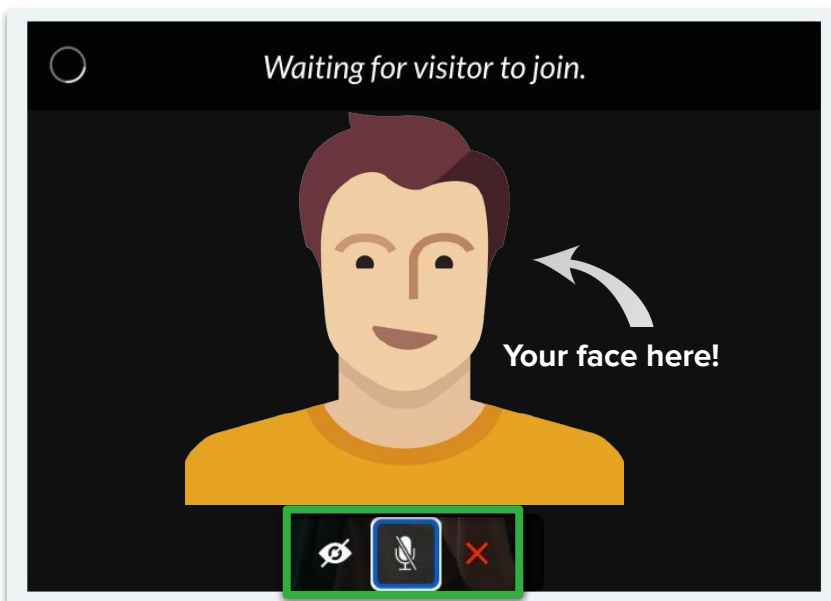
Chat Toolbar: Live Chat

DEALER INSPIRE

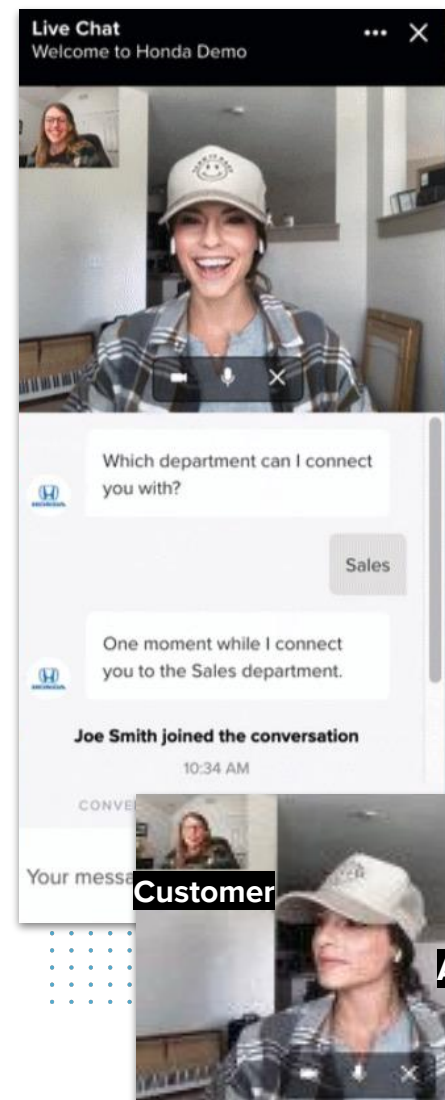
On the customer's end, they will receive an invitation to your video request. Once they accept by clicking Start Video, the video chat will begin at the top of the chat.

4. The Agent will be able to turn their camera and microphone on/off within the chat screen, and can end the video chat by pressing the red **X** (below)

Agent View



Customer View



How-To Start a Live Chat

1. Click Live Chat in the Chat Toolbar
2. Click Request Live Video
3. Enable Camera/Microphone for the first use
4. Wait for the customer to join by clicking Start Video
5. Enjoy the face-to-face interaction! 😊
6. End by pressing the **X**



Chat Toolbar: In-Chat Translation

DEALER INSPIRE



Joe is communicating with a customer who is a native German speaker. To connect with the customer accurately and appropriately, Joe will use the In-Chat Translation tool - where all this messages will translate to German, and the customer's messages will translate to English! Now he can capture that lead despite the language barrier!

With In-Chat Translation, an agent and customer are able to communicate effectively even when speaking different languages!

We will continue with our German example to show you how to use In-Chat Translation in your chats!

The customer just sent this message →

Guten Morgen! Ich suche ein neues Auto. Was für EVs haben Sie?

1. Select the **In-Chat Translation** icon
2. The In-Chat Translation will recognize which language the customer is speaking (to a percent of certainty). Select the language and click Translate.

Translate Chat

Select a language

Cancel TRANSLATE

→

Translate Chat

✓ Select a language

German — (100%)

Cancel TRANSLATE

You can also hover your cursor over the translated text to see the original.



Guten Morgen! Ich suche ein neues Auto. Was für EVs haben Sie?

Good morning! I'm looking for a new car. What kind of EVs do you have?



Chat Toolbar: In-Chat Translation

DEALER INSPIRE

Note: You can always toggle back to see the original by selecting the icon once again and choosing **Show Original**.

When the In-Chat Translation is enabled, an **orange circle** will appear on the icon.

You can turn this feature off by clicking the icon, then the Show Original button. When In-Chat Translation is off, the **orange circle** will disappear.

This tool does not just translate what the customer sends you, but it will also translate your response from your native language into the selected foreign language. See the example below.

Agent View

We have a wide variety of EVs. One moment. I'll send one over to you.

Joe Smith • 15:24 PM

Start chatting!



Customer View

Download our Training Guides! ... X

Welcome to Training Sandbox

Sales

One moment while I connect you to the Sales department.

Joe Smith joined the conversation

10:03 AM

All right, I've got Joe here to help you now.

Guten Morgen! Ich suche ein neues Auto. Was für EVs haben Sie?

Wir haben eine Vielzahl von Elektroanbietern. Einen Moment. Ich schicke dir eins rüber.

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

Your message here...



How-To Translate Your Chats

1. When you see a foreign language, click the In-Chat Translation icon
2. Select the language
3. Click Translate
4. Type a response in your primary language





CHECK YOUR KNOWLEDGE

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

- What shortcut can you use to access Hotkeys?
 - + (plus sign)
 - / (forward slash)
 - = (equals sign)
 - @ (at)
- What happens when you start a live chat?
 - You automatically show up on the customer's screen.
 - The chat ends and switches to video on your phone.
 - The customer will need to refresh.
 - The customer is prompted to start a video chat.
- What does the orange circle next to In-Chat Translation mean?
 - Translation is off
 - Translation needs to buffer
 - Translation is broken
 - Translation is on
- Which feature allows you to easily collect customer info for your lead form?
 - Transfer
 - Hotkeys
 - Explode to Text
 - Live Chat
- Where are images uploaded from in the Upload an Image tool?
 - Your computer
 - The cloud
 - The Glove Compartment
 - Your phone

REVIEW

What we covered in this section:

Chat Toolbar

Hotkeys

Explode to Text

Transfer


Upload an Image

Live Chat


In-Chat Translation

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


"I got them all right!"

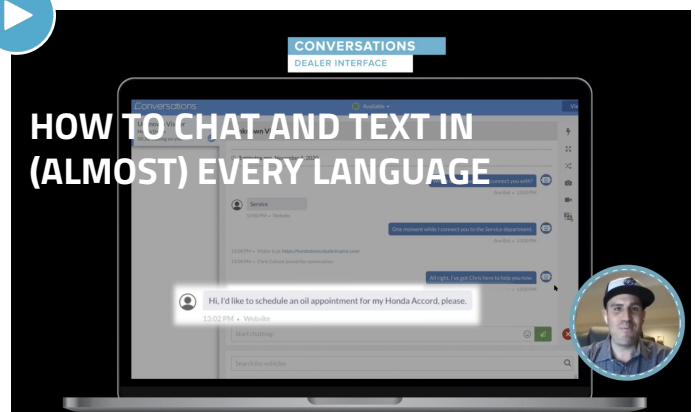
 Move on to the next section

"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-D, 3-D, 4-C, 5-A



Glove Compartment: Overview



Joe has been chatting with his customer, Billy Bobson, and it's clear that they are looking for more information on a specific vehicle. Joe has the ability to send over vehicle information, videos, PDFs, incentives, accolades, brochures, and even Youtube videos... all within Conversations!

The Glove Compartment facilitates sales while having a Conversation with your customer. You have access to a variety of resources from inventory, incentives to YouTube videos and more.

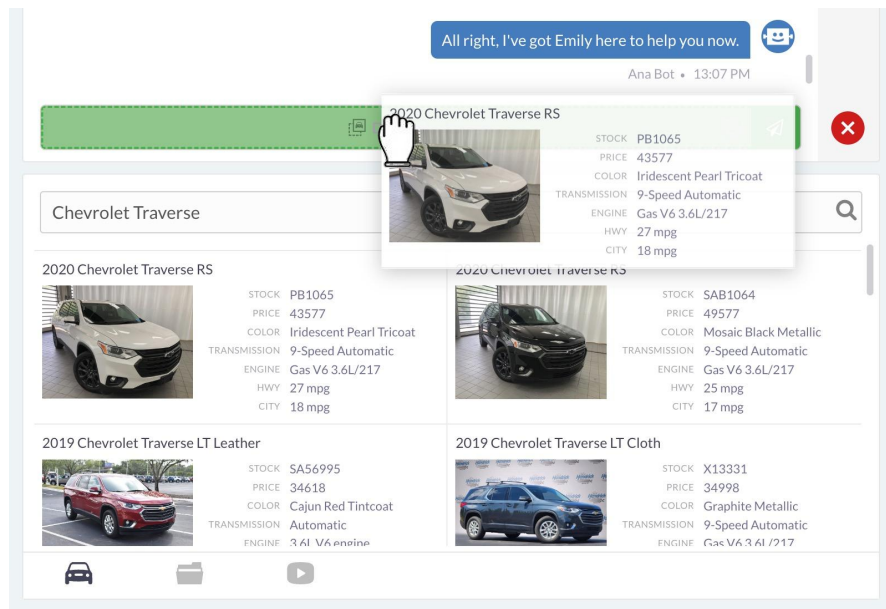
What you'll find in the Glove Compartment:

(It's more exciting than new registration and old maps, we promise!)

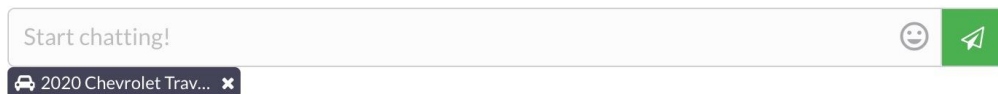
- **Inventory**
- **Files**
- **YouTube**

DID YOU KNOW?

Everything within the Glove Compartment is Click, Drag, and Droppable!



They will look like attachments when dropped into the “Start Chatting” box! Just hit Send!



⚠ Note: All files that you would like to have access to within the Glove Compartment must be uploaded into Conversations by an Admin at your dealership.



Glove Compartment: Inventory



Joe is talking with a customer who wants to see a used RAV4 from their lot. Because his website inventory feed is integrated with Conversations, he can use the Inventory feature in the Glove Compartment to send the customer cars from their lot in real time.



Your vehicle inventory feed is integrated into Conversations, so you can easily let customers know what you have in stock. We update it every hour to ensure you have the most current information available.

You can search various terms to find the exact vehicle your customer is looking for:

- Year
- Make
- Model
- Color
- Stock number
- VIN

— just about anything!

When you've found a vehicle to share, just click and drag it into the message of the Conversation.

All right, I've got Emily here to help you now. Ana Bot • 13:07 PM

2020 Chevrolet Traverse RS

Chevrolet Traverse

2020 Chevrolet Traverse RS

2019 Chevrolet Traverse LT Leather

2020 Chevrolet Traverse RS

2019 Chevrolet Traverse LT Cloth

Vehicle	Stock	Price	Color	Transmission	Engine	HWY	CITY
2020 Chevrolet Traverse RS	PB1065	43577	Iridescent Pearl Tricoat	9-Speed Automatic	Gas V6 3.6L/217	27 mpg	18 mpg
2019 Chevrolet Traverse LT Leather	SA56995	34618	Cajun Red Tintcoat	Automatic	3.6L V6 engine		
2020 Chevrolet Traverse RS	SAB1064	49577	Mosaic Black Metallic	9-Speed Automatic	Gas V6 3.6L/217	25 mpg	17 mpg
2019 Chevrolet Traverse LT Cloth	X13331	34998	Graphite Metallic	9-Speed Automatic	Gas V6 3.6L/217		



Glove Compartment: Files



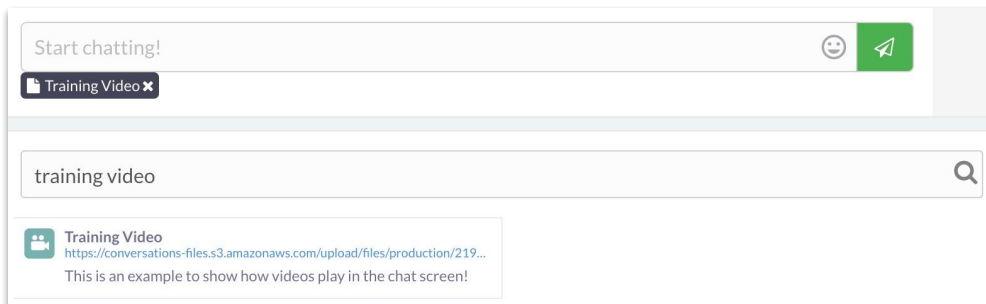
Joe is talking with a customer who is interested in a car on their lot, but wants to read up on more information about the vehicle. Joe can provide the customer with files -- in this case, a .pdf of specs on the vehicle.



In the File section of the Glove Compartment, you will have access to a variety of information such as vehicle accolades, incentives, brochures, etc.

These files might be accolades, images, promos, videos, deals, awards. Basically, any takeaway you would like your customers to have!

You can search, drag and drop into the Start Chatting box!



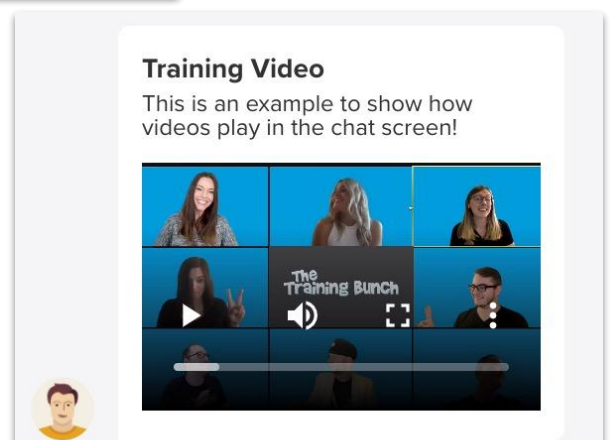
Supported File Types

- .pdf
- .mp4
- jpg

Videos sent from Files will play within the chat screen for the customer. See the example to the right of what a customer sees when a video is sent.

Images will also appear directly in the chat screen for the customer. PDFs will open in a new tab when clicked.

Clicking a PDF will not end the chat for the customer.



Customer View of Video When Sent



Glove Compartment: YouTube



Joe will use the YouTube feature in the Glove Compartment to send the customer some specifically dealer-branded material. YouTube videos from your dealership channel are a great way to deliver a different, unique type of media for your customer.

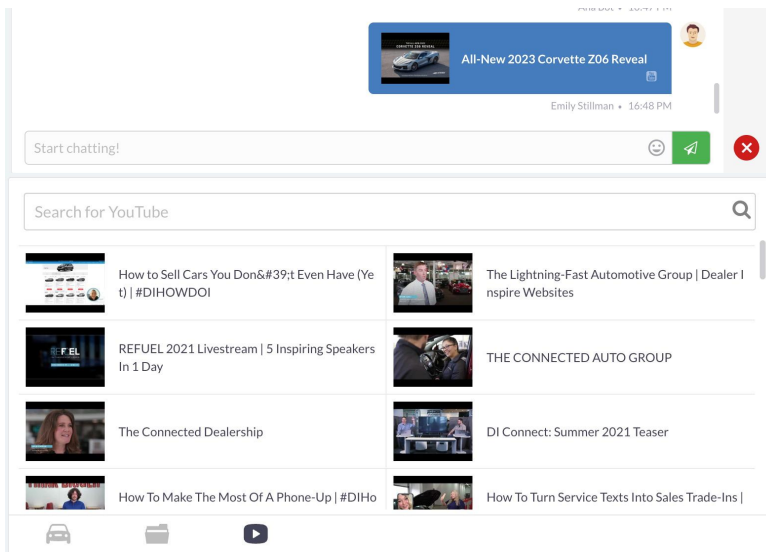


Conversations can also be integrated with your dealership's YouTube channel, so you can share any video on your channel with your customers.

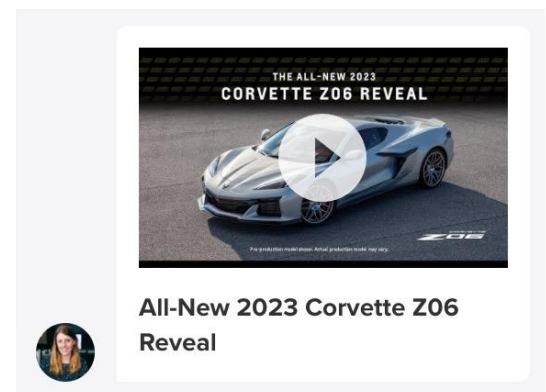
Just click and drag the video into the message area of your Conversation.

The customer can click on the video and it will open in a new tab, leaving their Conversations window open.

Agent View



Customer View



Best Practice

If you have a Youtube channel for your dealership, fill it up with videos showing customers what they can expect working with you!

Send those brand promises like what it's like to walk the lot with a Salesperson.





CHECK YOUR KNOWLEDGE

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

1. Which file types can be sent from the Glove Compartment?
 - a. .pdf's
 - b. .mp4's
 - c. .jpg's
 - d. all of the above
2. What happens when you send over a Youtube video?
 - a. It will not play, but can be copied and pasted.
 - b. When clicked, it will open and play in a new tab.
 - c. It will play with no sound.
 - d. It will automatically play.
3. Which of the following is true of the Glove Compartment?
 - a. Everything is click, drag, and droppable!
 - b. Everything has to be copied and pasted into the chat.
 - c. You cannot send vehicles.
 - d. Only Admins can send files.


REVIEW

What we covered in this section:


[Glove Compartment](#)
[Inventory](#)
[Files](#)
[Youtube](#)

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

"I got them all right!"

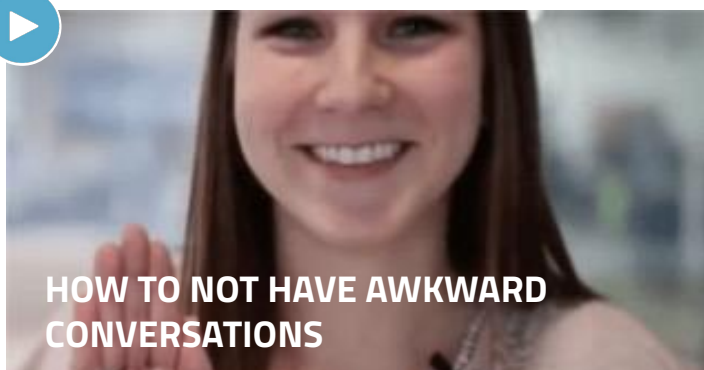
 Move on to the next section

"I missed 1-2."

 It might be good to review what you missed

"I missed 3-4."

 Review the content linked above

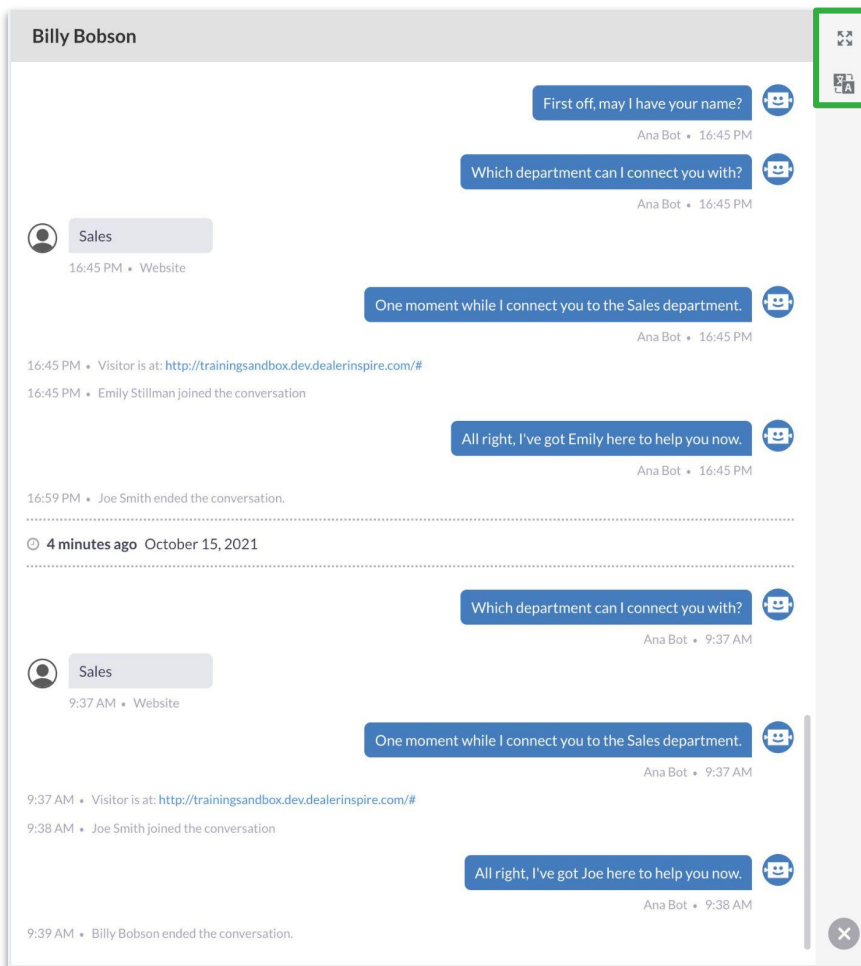


Ending a Chat



Joe's customer has not responded in a while, and he's looking to end the chat so that the Lead form will save to the CRM. We'll walk through what ending the chat looks like for Joe, why it's important for saving to the CRM, and how the customer can end a chat.

When you are looking to end a conversation, press the large red **X** in the Chat Window, shown below.



Pressing the **X** will end the conversation, and you will no longer be able to chat with the customer.

You will, however, still be able to:

1. See the conversation's history
2. Use the **Explode to Text** feature to fill out the lead form (**highlighted to the left**)
3. Translate the conversation using the **In-Chat Translation Tool** (**highlighted to the left**)

Behind the Curtain

Wonder what it looks like on the customer side?

Keep reading for a look into what the customer sees when they end a chat!



Saving to the CRM



The customer has been inactive for a long time, so Joe has ended the chat.

For Joe to save this lead to the CRM, he needs to check that the lead form has at least 3 pieces of information and click **Save to CRM**.

Ending a chat will display the Save to CRM button below your lead form. After the chat has ended, click the button with at least **3 pieces of information** filled out: First Name, Last Name, and either Email or Phone Number.

On the previous page, we showed that the Explode to Text and In-Chat Translation tools were still available once the chat was ended. This is to allow you to fill out the lead form, even after the chat ends.

You have the option to fill in any **CRM Notes**, which allows you to fill out notes for the conversation.

Note that each time this shopper initiates a chat or you reach back out via Outbound SMS, you will have the option to submit new CRM Notes.

You can select the CRM you would like to save to, here it defaulted to the team that my shopper reached out to, "Primary (Sales)".

Click **Save To CRM** and you will see a notification that the Lead has been sent. Note that the Save To CRM button has also changed to a green **Saved to CRM** button.



Consumer Details

First Name

Billy

Last Name

Bobson

Email

Phone

+13121231452

CRM Notes

Notes

Primary (Sales)

SAVE TO CRM



Best Practice

Conversations will send the lead as many times as the button is clicked. Your **CRM's de-duplication business rules** should recognize the lead as a duplicate, and append the info to the existing lead instead creating a new one.



When a Customer Ends a Chat



Joe has been chatting with his customer, but the customer is ready to end the chat. We'll take you behind the scenes so you can see what the customer sees when they're ending the chat.

For the Customer, when they are ready to end the chat, they will...

1. Choose the three dots ... in the top right corner
2. Click **X End Chat**
3. Answer that they're sure they want to end the chat
4. Be prompted to take a survey
 - Anything less than the **Green Smiley** gets flagged for the main person receiving chat transcripts for your team at the dealership
 - Who the transcripts are sent to is set up in the backend of Conversations by an Admin



5. After they take the survey, they will click **Close Conversation**, and they can even start a new one



Best Practice

Set a person at the dealership to follow up on Conversations that got flagged!

This is your chance to create some brand loyalty!

Download our Training Guides! ... X
Welcome to Training Sandbox
videos pl **X End Chat**

↓

End Chat

Would you like to end the conversation?

End

Cancel

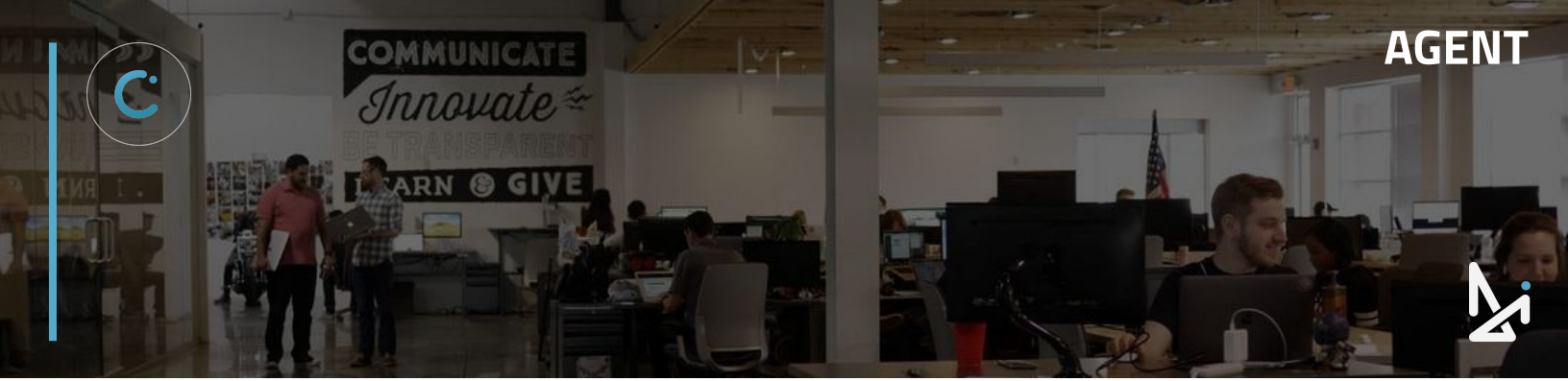
↓

How would you rate your conversation with Training Sandbox?

↓

Close Conversation





CHECK YOUR KNOWLEDGE

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

1. When a chat is ended...
 - a. the customer will see a survey
 - b. you can still message the shopper
 - c. all tools in the Toolbar are still accessible
 - d. you will no longer be able to read the Conversation
2. For a lead to send to the CRM at the time the chat ends, you need...
 - a. 4 pieces of information
 - b. 3 pieces of information
 - c. the first and last name
 - d. to have the entire form filled out
3. When a customer wants to end a chat...
 - a. they click the three dots in the top, right-hand corner
 - b. they click the X in the top, right-hand corner
 - c. they navigate to a different page
 - d. they call the dealership and initiate the end-chat sequence

REVIEW

What we covered in this section:


Ending a Chat

Saving to the CRM


When a Customer Ends a Chat

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


"I got them all right!"

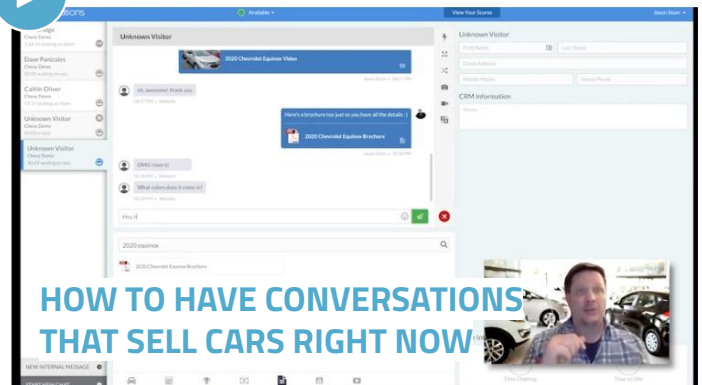
 Move on to the next section

"I missed one"

 It might be good to review what you missed

"I missed 2-3."

 Review the content linked above



Account Admin for Agents



Even though Joe is an Agent, he can still access some of the reporting in the backend of Conversations by navigating to Account Admin. Here he will be able to see various dashboards and access different reporting.

Navigate to the backend by clicking your name in the top, right-hand corner and select **Account Admin**.

Here you will be able to access the following sections:

- My Profile
- Dashboard
 - This will be the page you are defaulted to
- Conversation History
- Summary Report
- Live Agent Status

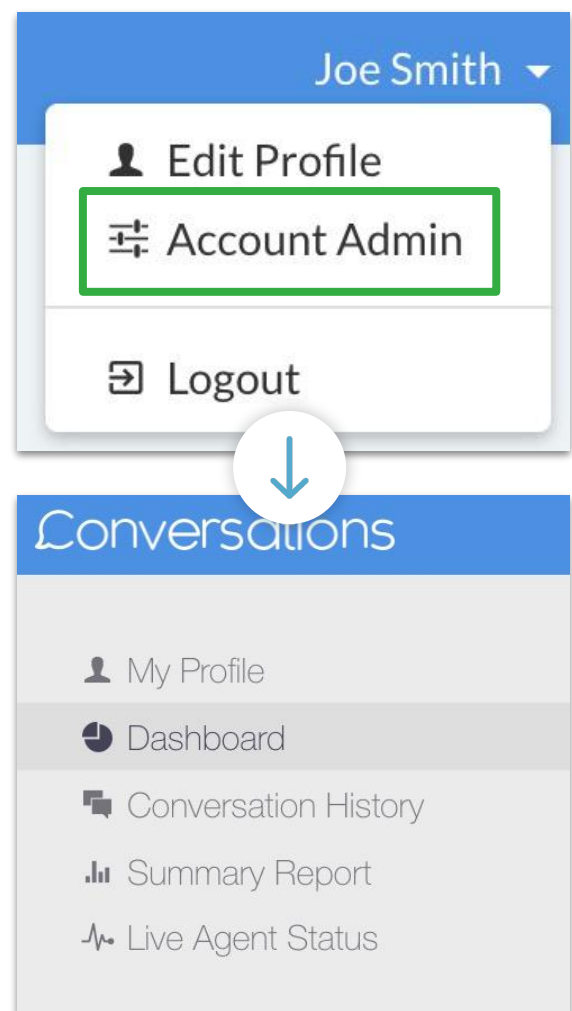
In the upcoming pages, we will go into depth on each section.



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!



Account Admin: My Profile



Joe wants to make sure that all of the information in his Profile is correct.

From here, he can make updates to his name, contact information, profile picture, and even settings like password, main language, and timezone.

Within My Profile, you can:

1. Change your...
 - a. Password
 - b. Locale (English, Spanish, French)
 - c. Timezone
2. Update your profile picture by clicking...
 - a. Your existing picture
 - b. Remove
 - c. Change

3. Change your...
 - a. First Name
 - b. Last Name
 - c. Email
 - d. Phone Number

Don't forget to save your changes as you make updates!

Edit Profile

Account Information

Username TrainingAgent_1

Password [CHANGE MY PASSWORD](#)

Locale

Timezone* America/Chicago

2



REMOVE

CHANGE

Extension Installed

Contact Information

First Name* Training Agent

Last Name* 1

Email* olczykalexandra@gmail.com

Phone

3

Cancel

SAVE CHANGES



Account Admin: Dashboard



Joe wants to see the number of chats for the last 24 hours on his site.

He can head into the Dashboard and view a high level overview of the chats on his site.

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

Training Sandbox Dashboard

2

Total Chats

2

Answered

2

Interactive Chats

0

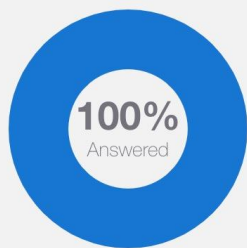
Missed

2

Leads

100%
interactive conversion
100%

Today

**15:36**

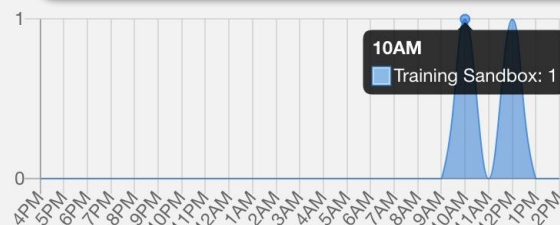
Average Conversation Length

0:03

Average Visitor Wait Time

Hourly Activity

Training Sandbox



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

Locations

Training Sandbox

[View Dashboard](#)

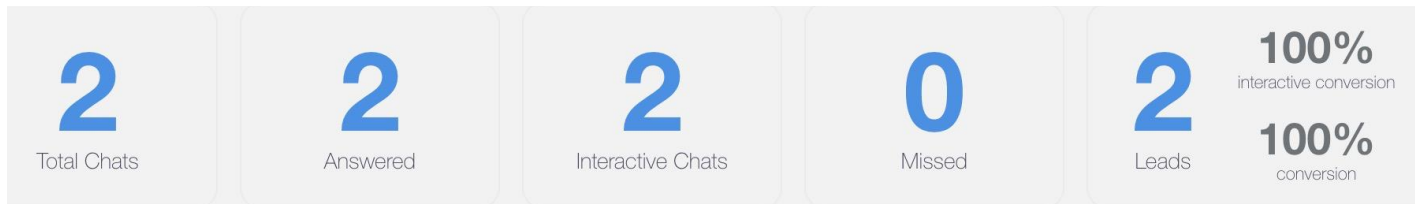
Multiple locations will show up here if you are associated with more than one dealership. Click "View Dashboard" to drill down to view the dashboard for that dealership.

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



Account Admin: 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?

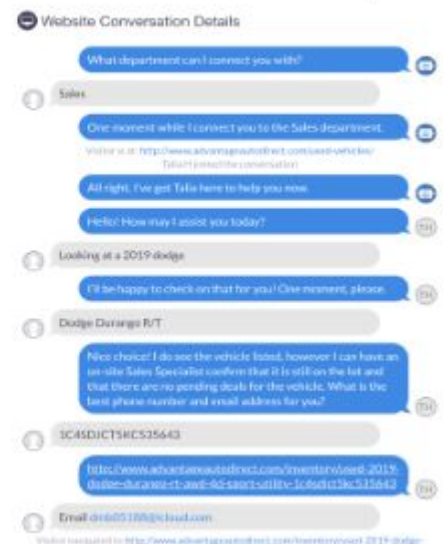
An Interactive Chat occurs when a visitor has sent at least one message to an Agent after escalation.

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.



Account Admin: Conversation History



Joe needs to review a Conversation he had yesterday because it did not send over the the CRM automatically. He will need to manually send the lead over to the CRM. Joe can even follow up on leads using the Conversation History!

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

Lookup by ID Download CSV

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

Location All Locations

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 11:35 AM - 11:39 AM	View Details
✓	Pam Williams	Training Sandbox	Sales	Ana Bot, Training Agent 1					

Filter by Agent

Choose an agent to filter by

CANCEL
 FILTER



Account Admin: Conversation 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

All Locations

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	<div>View Details</div>
	Pam Williams	Training Sandbox	Sales	Ana Bot, Training Agent 1	1:26	10.00	Web	Oct 27, 2021 11:37 AM - 11:38 AM	<div>View Details</div>

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

What year is your current vehicle?

2013

Ford

Focus

Thanks! What make is it?

Perfect. And what model?

Training Sandbox
Sales
ID: 69df5tbdhl
Training Agent 1

0:03 Wait Time
1:12 Duration

First Name: Pam
Last Name: Williams
Email Address:
Mobile Phone: +1312123141
Home Phone:
Street Address:
City:
State:
Postal Code:
Country:
SAVE

CRM Notes:
CRM: Primary (Sales)
Action: Send Lead

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



Account Admin: Summary Report



Joe wants to view the same information from the Dashboard, but he wants to look at the last 90 days, or another date range, instead of the last 24 hours. The Summary Report will allow him to customize the date range to view this data.

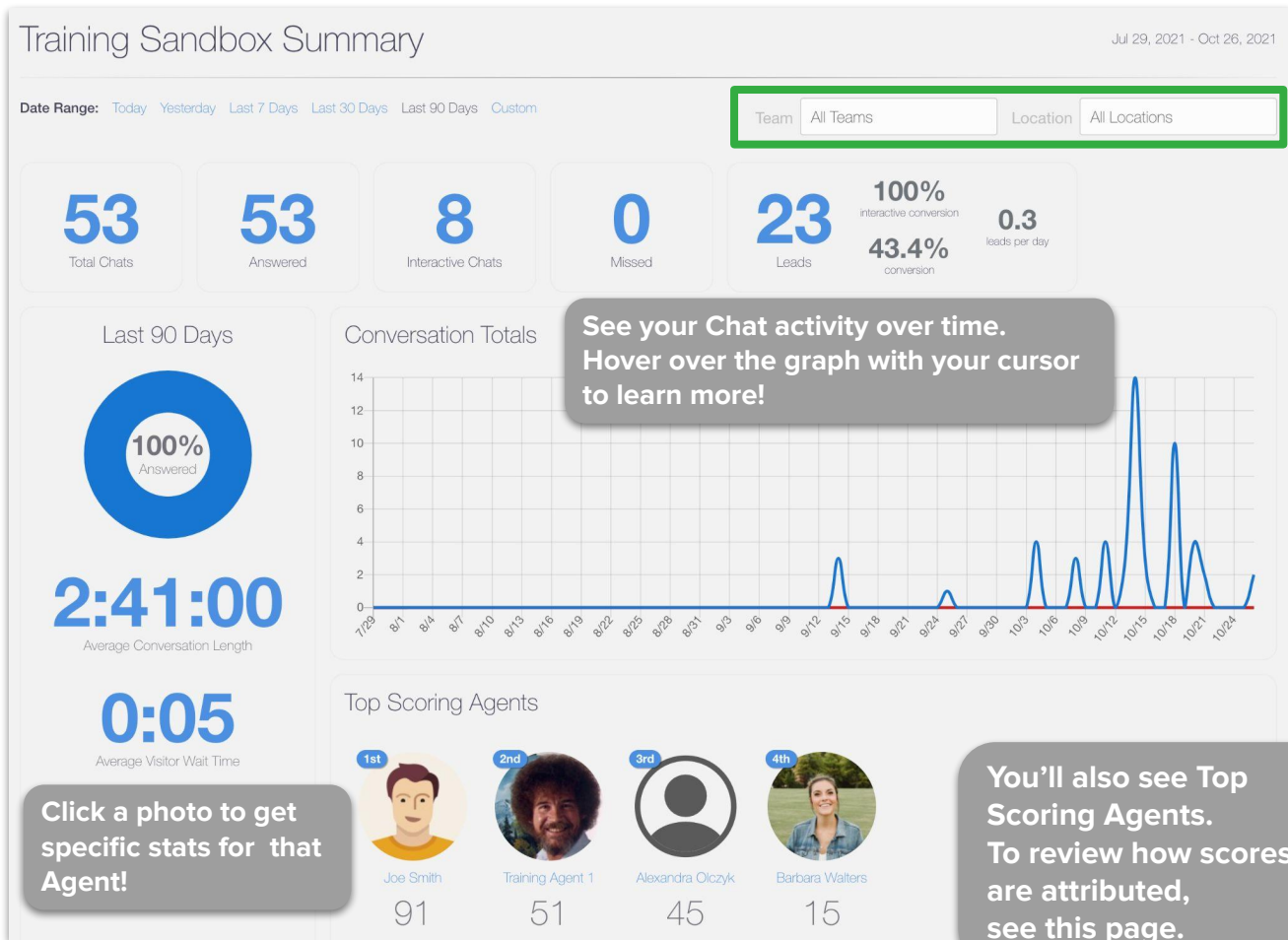
Here you'll see:

- **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!



Account Admin: Live Agent Status



Joe is curious to know which of his coworkers are also online to receive chats. He can even check here to see how many active chats each person has. He might use this information to inform his decision on who to transfer his next chat to.

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





CONGRATULATIONS!



Joe has all he needs to answer chats and capture leads for his dealership! He even got a sneak-peek at reporting in the backend, even though he's not an Admin!

He can answer chats, utilize the Chat Toolbar, send from the Glove Compartment, start an Outbound SMS, send an internal message, and save to the CRM.

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 Admin

If you are an Admin, you can answer chats just like an Agent, but have access to additional features in the backend.

As an Admin, you will have the ability to add users, access reporting, take over chats, and even customize the look and feel for the customer chatting on your site!

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!

