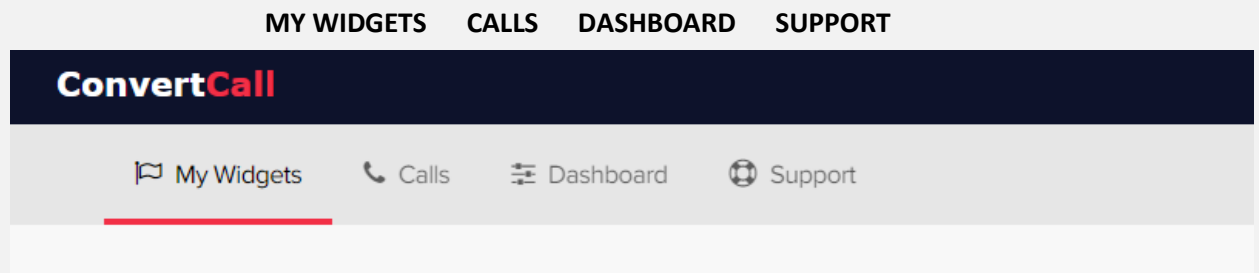


ADDING & EDITING WIDGET

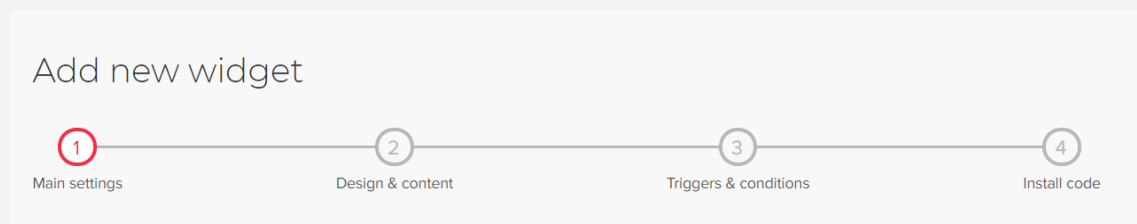
The **MENU** of the ConvertCall is very simple and well structured. It has 4 main parts:

- My Widgets
- Calls
- Dashboard
- Support



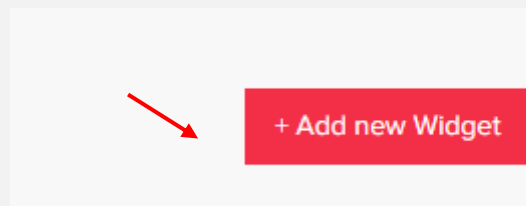
“MY WIDGETS” is the part where you add and design the widget itself as well as set the conditions and triggers of the widget. It has the submenu which includes the following parts:

- Main settings
- Design & content
- Triggers & conditions
- Install code

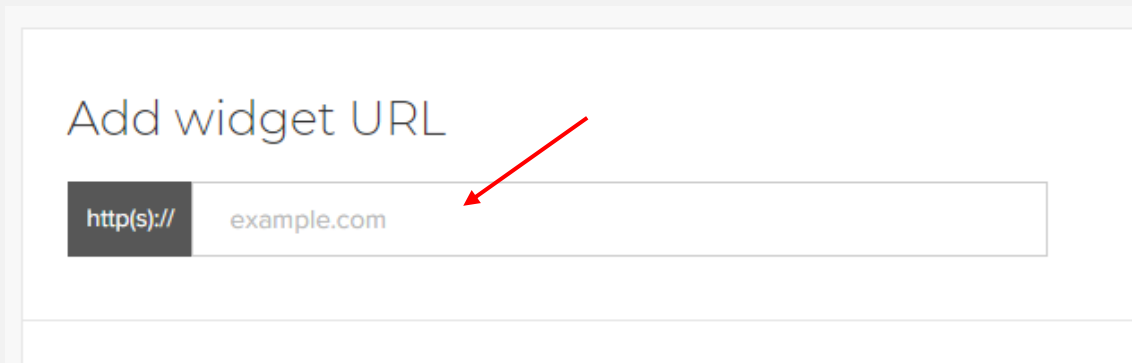


Main settings

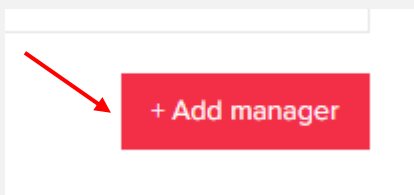
To create a new widget, please click on **“Add new Widget”** button:



1. To begin with please add the website address where the widget will be installed:



2. Then click on “Add manager” button:



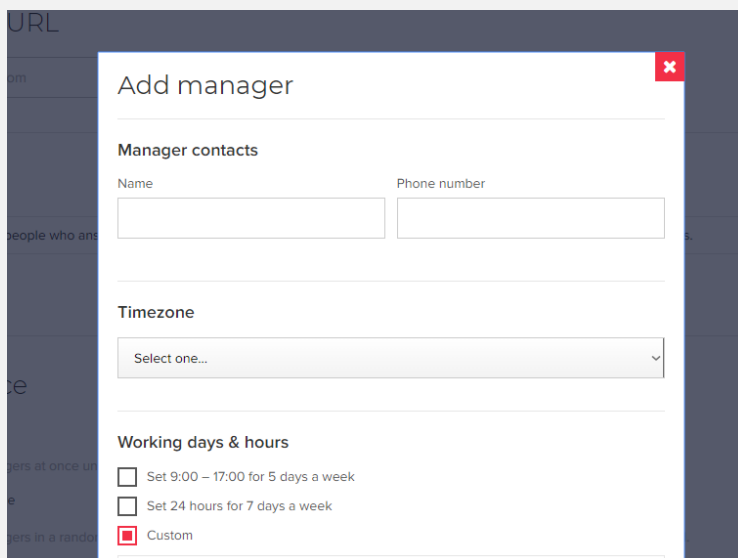
You can add, edit, disactivate or delete the managers.

** Call managers are people who answer the calls by ConvertCall system.*

** Call managers can receive calls only during their working hours.*

When adding the manager, the following information can be set:

- Name
- Phone number
- Time zone
- Working hours (can be customized)



When you added the manager, please confirm his/her number by clicking on the link “Verify” near the manager’s number:

Tania

[Redacted] | Verify

On

Mon

9:00

17:00

You will receive the SMS with the **confirmation code** to be entered in the following window:

You will receive a SMS with verification code from us. You will be asked to input a validation code and submit it using below form:

Code

Verify

After that the manager's contact will be activated and he will receive the phone calls.

Do not forget to save the changes after you set the manager, please use **"Save &continue"** button on the very bottom of the page:

quality for end user

Save & continue

3. To set the way the calls will follow each other please use the **"Call sequence"** option. There are 3 possibilities to choose from:
 - a) **At the same time**
The system calls all managers at once until one of them answers a call.
 - b) **In a random sequence**
The system calls all managers in a random sequence: with 5-10 seconds delay. After one of the managers answers a call, the dialing is ended.

c) **In a sequence**

This option offers you as well 2 possibilities to set the sequence:

Manually

You set the order of the managers choosing who the system will call first, if he is not available then it will dial the second from the list and exc.:

The screenshot shows a configuration window titled "Call sequence". It contains three radio button options: "At the same time", "In a random sequence", and "In a sequence". The "In a sequence" option is selected. Below these options are three descriptive paragraphs. The first paragraph describes the "At the same time" option. The second paragraph describes the "In a random sequence" option. The third paragraph describes the "In a sequence" option. Below the paragraphs is a dropdown menu labeled "Choose sequence type" with "Manually" selected. Below the dropdown menu is a label "Choose managers that system will call to:" followed by a label "First manager" and a dropdown menu with "Manager name" selected.

By ranking

The system calls all managers in sequence from higher to lower rate: with 5-10 seconds delay. After one of the managers answers a call, the dialing is ended.

4. **"Time to call back"** is the part of the menu where you set the callback time: from 8 to 59 sec.

*We recommend you to set the callback time between 25 and 27 sec.

The screenshot shows a configuration window titled "Time to call back". It contains a label "Promise to call back to client through:" followed by a numeric input field with the value "27s" and a spinner button. Below the input field is a horizontal slider bar with a red vertical marker indicating the current value.

5. **"Retry failed calls"** option allows you to provide a callback even if the client did not answer straight away or the manager did do either for any reason, or in both these cases. You can set up to 10 attempts with different time interval.

Retry failed calls

+ Add attempt

Define that call is failed if:

Manager didn't answer ▼

Retry failed calls on the next working day:

Yes ▼

6. **“Call recording”** gives you the possibility to record the phone calls provided by your managers. Client will be warned about call recording.

7. **“Country codes to display in widget”**

There are 2 options to choose from:

- a) **Display all**
- b) **Display selected**

Setting the **“Display all”** option you will make all the country codes visible for the client on the widget. There is a possibility to make one or few particular country visible first from the entire list.

With the option **“Display selected”** only the country codes of your choice will be visible for the website visitors:

Country codes to display in widget

Display all

On ☒

Select primary code(s) in the list:

 +1 United States of America ▼

Display selected

Off ☐

Select codes in the list:

Select code (3 countries selected) ▼

Select primary code in the list:

 +358 Åland Islands ▼

8. If you want to receive notifications about the actions made by website visitors with the widget there is an option called **“Email(s) for notifications”**.

You can add several email addresses for different types of notifications:

Email(s) for notifications

Provide email(s) of people who will receive notifications about actions with this widget

☒ Schedule a call for another time

☒ Immediately after the conversation started

☒ Immediately after the end of the conversation

☒ The customer or operator did not pick up the phone

☒ The old friend popped in

☒ Schedule a call for another time

☒ Immediately after the conversation started

☒ Immediately after the end of the conversation

☒ The customer or operator did not pick up the phone

☐ The old friend popped in

9. To follow up on the callback provided or if you did not manage to join the potential client, not to lose him you should activate the **“After calling SMS to visitor”** where you can add the customized text of the message:

Aftercalling SMS to visitor



Clients will receive an SMS with the information of the manager

From

ConvertCall

Length: 4 - 11 characters

Successful Calls

Thank you for contacting us on [Widget Name]. I was happy to consult you & learn about your needs. My contact number is [Manager Number] Best regards, [Manager Name].

-36 characters remaining

Unsuccessful Calls

[Widget Name] tried to call you but couldn't get through :(You can contact us by this number [Manager Number]

20 characters remaining

Click to insert placeholders for your call manager details

Manager Name Manager Number Widget Name

After setting everything in this part of the submenu, please use "Save &continue" button to proceed with "Design & content" of the widget:

quality for end user

Save & continue

Design & content

When you are done with the main settings let's look at the **"Design & content"**.

There are 2 main parts:

- a) Form design & content
- b) Button design & content

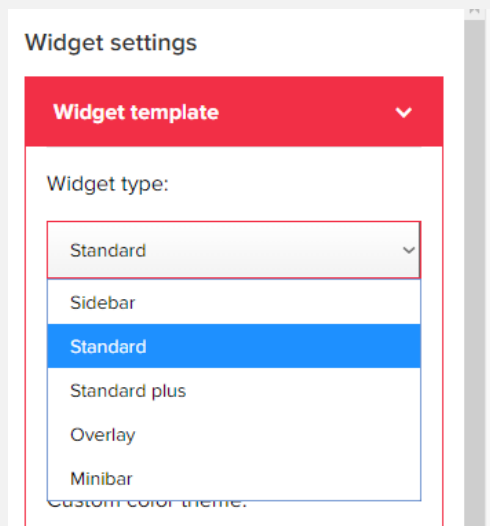
Form design & content

In the **"Form design & content"** there is a widget form editor to personalize the form itself and the text in it. In the editor you can update the **"Widget template"** and **"Widget content"**.

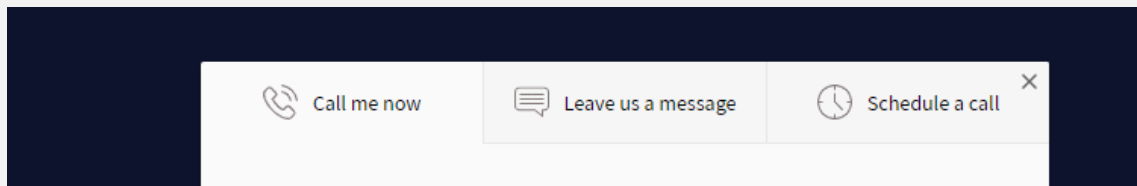
There are 5 **"widget types"** to choose from:

- Standard
- Sidebar
- Standard Plus
- Overlay
- Minibar

Widget template



Standard template is set by default. The structure of the widget is very simple and has 3 main parts:



The widget templates differ in size and the menu layout. Standard Plus template has an option to add the background photo, for example. The template choice makes it possible for you to personalize your widget. By choosing the template in a dropdown you can see the exact way it will look on your website.

Next option is **"widget color"**, here you can either choose from the existing colours or add the customized one to suit your website colour, for example.

"Button shape" offers you the following button design options:

Button shape:

Not Rounded

Not Rounded

Slightly Rounded


Fully Rounded

Widget content

In the “Widget content” you have access to the following settings:

1. You can upload the picture, which will be either the photo of the manager or the logo of the company:

Or choose sample photo



Manager name

2. The next step will be to update the text loaded in the form. This is the great option to personalize the text itself as well as the text of the button for every part of the widget. You can write in any language, moreover for your convenience we have created the default text templates as an example:

Widget texts:

English

Call now

Message

Schedule

Out of office

Success

Two step form

On

Text

Have a questions? Would you like tc

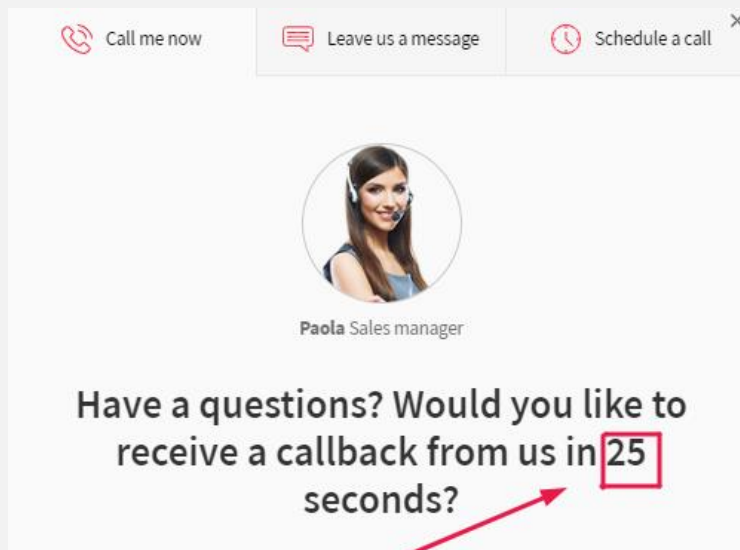
Button text

Let's look at each tab separately:

“Call me now”

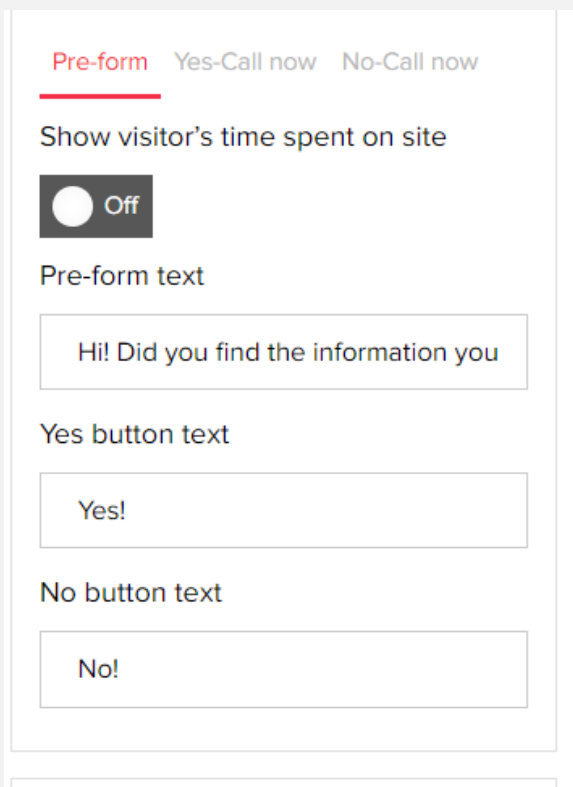
This is the tab where the website visitor can request the free callback.

**Do not forget to set the callback time in seconds which was set already in the “Main settings” as well:*




The screenshot shows a widget with three tabs at the top: "Call me now" (active), "Leave us a message", and "Schedule a call". Below the tabs is a circular profile picture of a woman wearing a headset, with the text "Paola Sales manager" underneath. The main text of the widget reads: "Have a questions? Would you like to receive a callback from us in 25 seconds?". The number "25" is highlighted with a red square, and a red arrow points to it from below.


The “Call now” button has an option to activate the **“Pre-form”** tab by switching on the **“Two step form”**. The **“Pre-form”** will help you to capture the website visitor and involve him in requesting the callback.



The screenshot shows the configuration settings for the "Pre-form" tab. At the top, there are three tabs: "Pre-form" (active), "Yes-Call now", and "No-Call now". Below the tabs, the settings are as follows:

- Show visitor's time spent on site:** A toggle switch is currently turned "Off".
- Pre-form text:** A text input field containing "Hi! Did you find the information you".
- Yes button text:** A text input field containing "Yes!".
- No button text:** A text input field containing "No!".





JOHN SMITH Sales manager

Hi! Did you find the information you need on our site?

Yes!

No!

“Message us”

In this tab the client can leave his contact details to be reached later, it can happen when the manager is not available or the client does not want to request the callback.

English ▼

Call now

Message

Schedule

Out of office

Success

Text

Drop us a message! We'll definitely get

Button text

Message us

Name input

On ☒

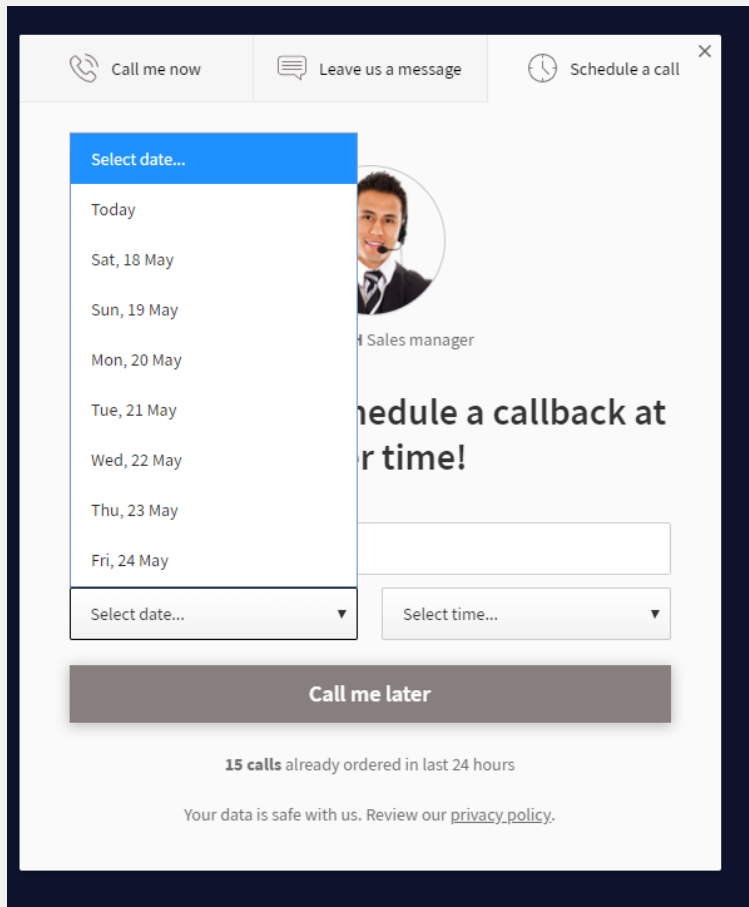
Phone input

On ☒

“Schedule a call”

The tab where the client can request the callback at a convenient date and time.

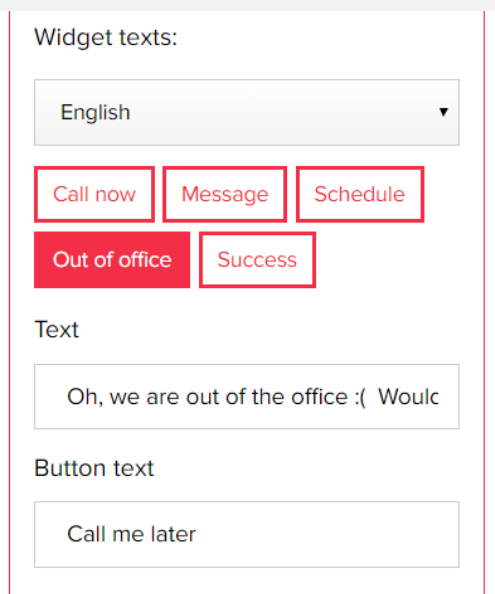
Date and time will be substituted based on the work schedule of the manager set in the “Main settings”. The customer will be dialed automatically at a specified time:



The screenshot shows a web interface for scheduling a call. At the top, there are three tabs: "Call me now" (with a phone icon), "Leave us a message" (with a speech bubble icon), and "Schedule a call" (with a clock icon). The "Schedule a call" tab is active. Below the tabs, there is a dropdown menu labeled "Select date..." which is open, showing a list of dates from "Today" to "Fri, 24 May". To the right of the date dropdown is a circular profile picture of a man in a suit and headset, with the text "Sales manager" below it. Below the profile picture, the text "Schedule a callback at your time!" is visible. There are two input fields: one for the date (which is the dropdown menu) and one for the time (labeled "Select time..."). Below these fields is a large grey button labeled "Call me later". At the bottom, there is a status message: "15 calls already ordered in last 24 hours" and a link to the "privacy policy".

“Out of office”

The tab that has similar function with the “Schedule a call” tab, it appears out of the manager’s working hours.



The screenshot shows a configuration panel for the "Out of office" widget. It has a title "Widget texts:". Below the title is a dropdown menu labeled "English". There are five buttons arranged in two rows: "Call now", "Message", and "Schedule" in the first row; "Out of office" and "Success" in the second row. Below the buttons is a section labeled "Text" with a text input field containing the text "Oh, we are out of the office :(Would". Below that is a section labeled "Button text" with a text input field containing the text "Call me later".

“Success “

It appears when any of the actions from the tabs below was fulfilled by the client, the text per each part “Call now”, “Message” or “Schedule” can be customized accordingly.

Widget texts:

English ▼

Call now Message Schedule

Out of office Success

Call now Message Schedule

Out of office

Text

Thanks for your time! I was happy to

Moreover, after setting these parts you can invite your website visitors to join your **Social Media Accounts**:

Social inviting

On ●

Text

Let's become friends:

Facebook On ●

Twitter On ●

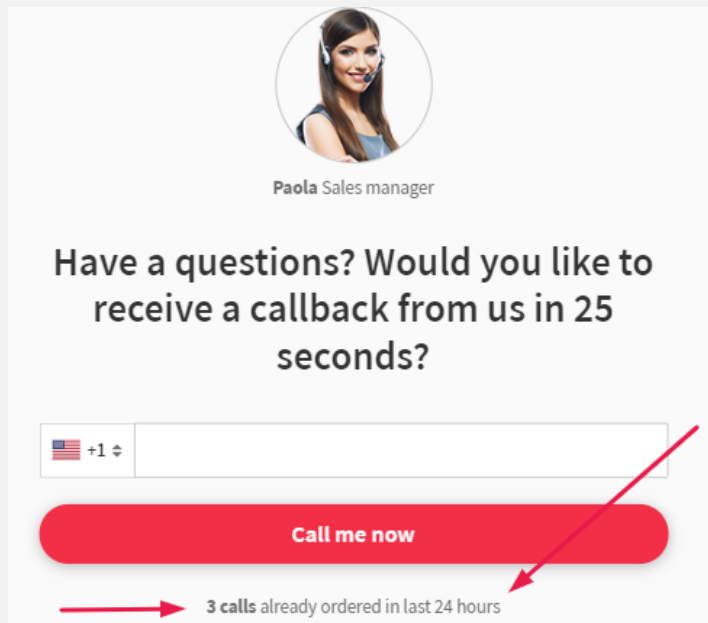
Instagram On ●

YouTube On ●

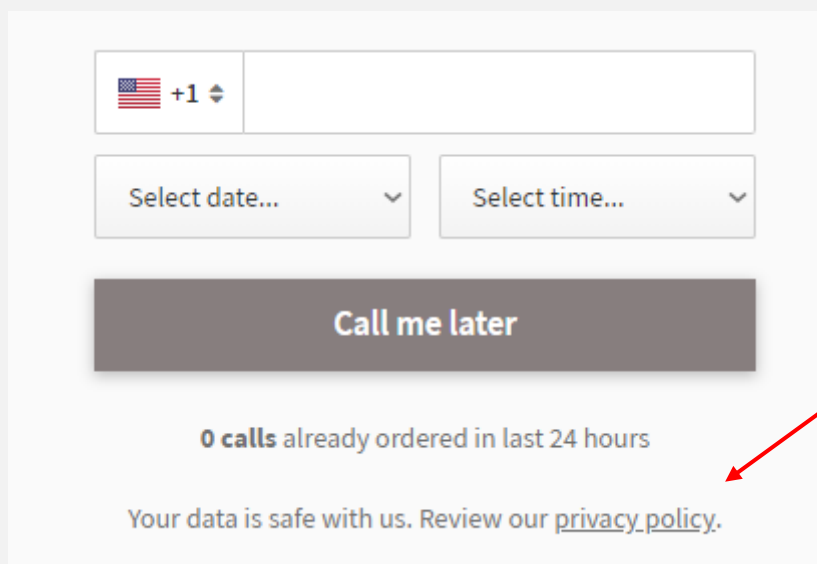
“Other settings”

There are as well the so-called “Other settings” which allow you:

1. To set timer for the callback and add the personalized text, “**Show timer**”
2. To give the visitor opportunity to rate the service quality after the callback, “**Show call rate**”- customer ratings are collected in the statistics of calls and determine the rating of managers.
3. “**Show call stats**”- social proof function shows real data of the widget activity on the calls ordered in the widget, you can set the display for a day, 7 days and 30 days:



4. “**Show Data protection**” – here you can set the link to the website security policy:



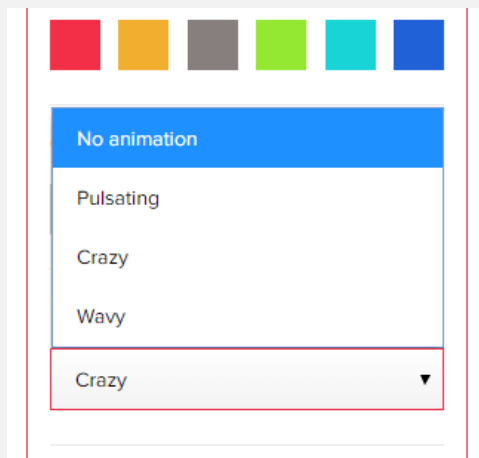
5. “**Close widget clicking on background**”- When enabled, it is possible to close the widget when you click on the background of the website.
6. “**Show Powered by ConvertCall**”- enable / disable branding

“BUTTON DESIGN & CONTENT”

In the “**Button design & content**” you get access to “**Button settings**” where you can update “**Button template**” and activate the “**Tooltip settings**”.

Within “**Button template**” you can modify:

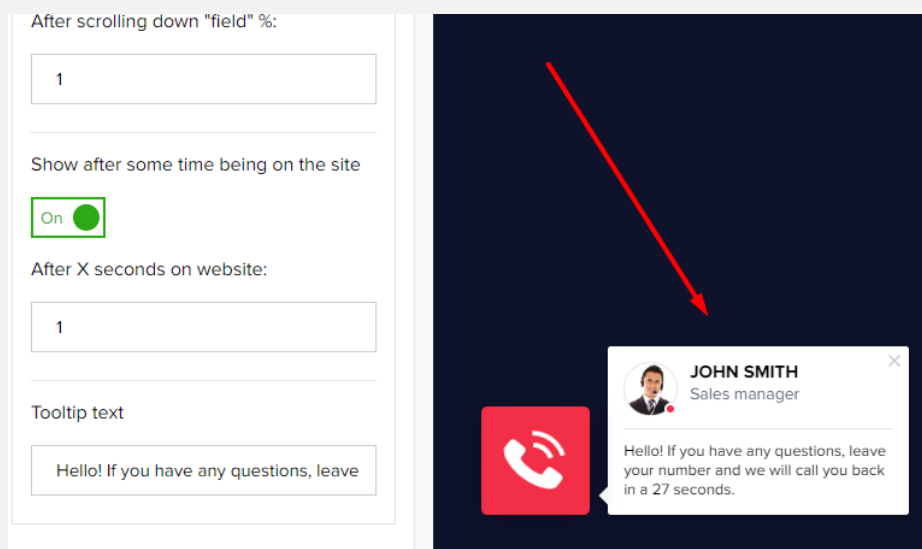
- **Button position** - right or left of the site
- **Button type** - square or round with an icon choice also
- **Button size** - large, medium, small
- **Button color theme** - the ability to choose any color for the button
- **Button animation** - setting up button animation



As well as Close Callback button.

Tooltip set in the “**Tooltip settings**” can be shown when certain actions are taken by the visitor. The tooltip will be visible when the following options are “ON”:

- Show when hovering over button
- Show when scrolling down the site
- Show after some time being on the site
- After X seconds on website

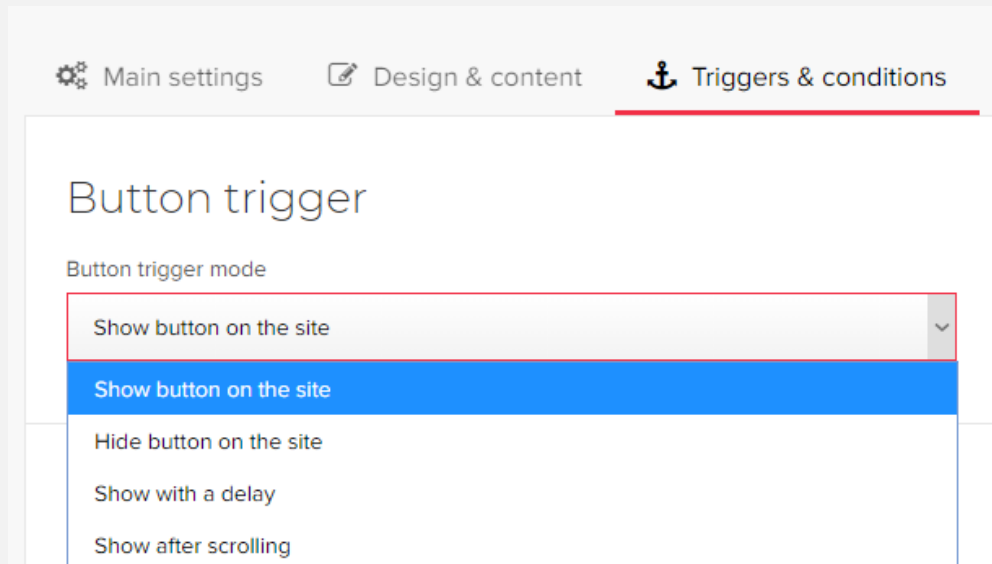


You can modify the tooltip text as well.

“Triggers & conditions”

When we are happy with the design of the widget and we are ready to set the triggers for the widget we need to go to “**Triggers & conditions**”.

In the “**Button trigger**” part you can set the “**Button trigger mode**”:

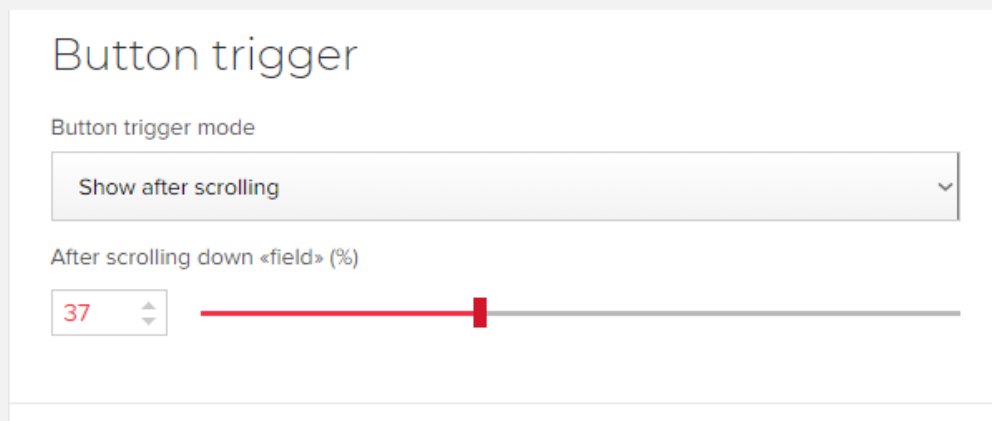


Button trigger

Button trigger mode

- Show button on the site
- Show button on the site
- Hide button on the site
- Show with a delay
- Show after scrolling

“**Show with a delay**” and “**Show after scrolling**” require additional information to be entered:



Button trigger

Button trigger mode

Show after scrolling

After scrolling down «field» (%)

37

“**Night mode**” On/Off option

When the option is ON, widget is shown after working hours so the client can schedule a callback for later.

“**Widget's display settings**” On/Off option, here we you can set mode of the widget, meaning the way the widget occurs on the website. There are following mode type to choose from:

Widget's display settings

On ☒

Widget trigger mode

- Aggressive
- Aggressive
- Moderate
- Rare
- Manual mode
- Only new visitors

The display mode determines how many times the window pops up for the visitor on the website:

“Aggressive” - the window is shown every time the visitor enters the website.

“Moderate” - the window is shown no more than once a day.

“Rare” - the window is shown no more than once a week.

“Only new visitors” mode will make the widget visible only to the new visitors.

“Manuel mode” allows you to set the personalized behavior of the widget:

Widget's display settings

On ☒

Widget trigger mode

- Manual mode

Show widget to 1 visitor with periodicity...

3 time(s) in 1 hour(s)

“Widget triggers”:

After turning on Widget’s display settings, a number of widget triggers are activated. Let’s look at each of them separately:

- **After X seconds on website**

The trigger display the form of the widget by the time of the visitor on the website

- **After browsing X pages on website**

This is an opportunity to set the widget to be displayed, based on the number of pages spent by the visitor on the website

- **After X seconds of inactivity on website**

This trigger when it is set, is responsible for displaying the widget at a certain time when the visitor is not active on the site, that is, when he does not perform absolutely any actions on the pages with the widget

- **After clicking on external link**

When enabled, the widget will appear when you click on any external link on the website

- **After exit-intent not earlier than X seconds being on website**

The widget appears when the visitor tries to exit the website (is applied only to large screens (desktop), since this setting records the movement of the visitor's mouse outside the tab

Widget triggers

- ☒ After X seconds on website
15
- ☒ After browsing X pages on website
1
- ☒ After X seconds of inactivity on website
18
- ☒ After clicking on external link
- ☒ After exit-intent not earlier than X seconds being on website
24
- ☒ Display exit-intent widget even if visitor had seen it before

** If there are more than one active setting in this list, then the display of the widget form will depend on the trigger whose settings were the first to respond to the visitor's actions on the website.*

“Display widget only on specific pages” give you possibility to add or disactivate the widget on specific pages. If both of these settings are disabled, the widget form will be displayed on all pages of the site by default.

Display widget only on specific pages

Don't display widget on following pages or page sections:

On

Display widget only on following pages or page sections:

Off

+ Add link

“Trigger widget on mobile devices” option when switched on enable the widget on all mobile devices. When enabled, all configured triggers from the list will apply to mobile devices:

Trigger widget on mobile devices

On

Trigger widget for mobile visitors.

“Custom codes”

1. Call from the forms on the website

If **“Call from the forms”** is enabled, then your website forms will be integrated with the callback widget. When the user submits the form where the phone will be specified, the widget will automatically make a callback.

You can set the form name by specifying `data-magic-form-label="name"` in the form tag. The name of the form will be announced in a greeting before connecting to the client.

2. Trigger widget upon click

You need to call the widget when you click on your button "Request a call" (or any other link or button on your site)?

To do this, you need to link this button with the HTML tag and set `href="#callbackwidget"`.

For example, `Request a call`.

Custom codes

Call from the forms on the website

- ☒ Disabled
- ☐ Enabled for all website forms
- ☐ Enabled for certain website forms that have a class `lb-magic-form`

When calling from a form

Show widget's form ▼


i If "Call from the forms" is enabled, then your website forms will be integrated with the callback widget. When the user submits the form where the phone will be specified, the widget will automatically make a callback. You can set the form name by specifying `data-magic-form-label="name"` in the form tag. The name of the form will be announced in a greeting before connecting to the client.


Trigger widget upon click


i You need to call the widget when you click on your button "Request a call" (or any other link or button on your site)? To do this, you need to link this button with the HTML tag and set `href="#callbackwidget"`. For example, `Request a call`.


"Install code"

In the **"Install code"** section you get access to the code that should be installed on every page of your website in the end of body tag. The widget code is unique for each added widget / website:

 Main settings

 Design & content

 Triggers & conditions

 Install code

Widget code

Place this code on every page of your website in the end of **body** tag.

```
<script type="text/javascript" async src="https://account.convertcall.app/static/widgets/widget-4d52115abd1a47c09a76e913d382d6ca.js"></script>
```

Copy code

Check code

You can send code directly to your IT as well:

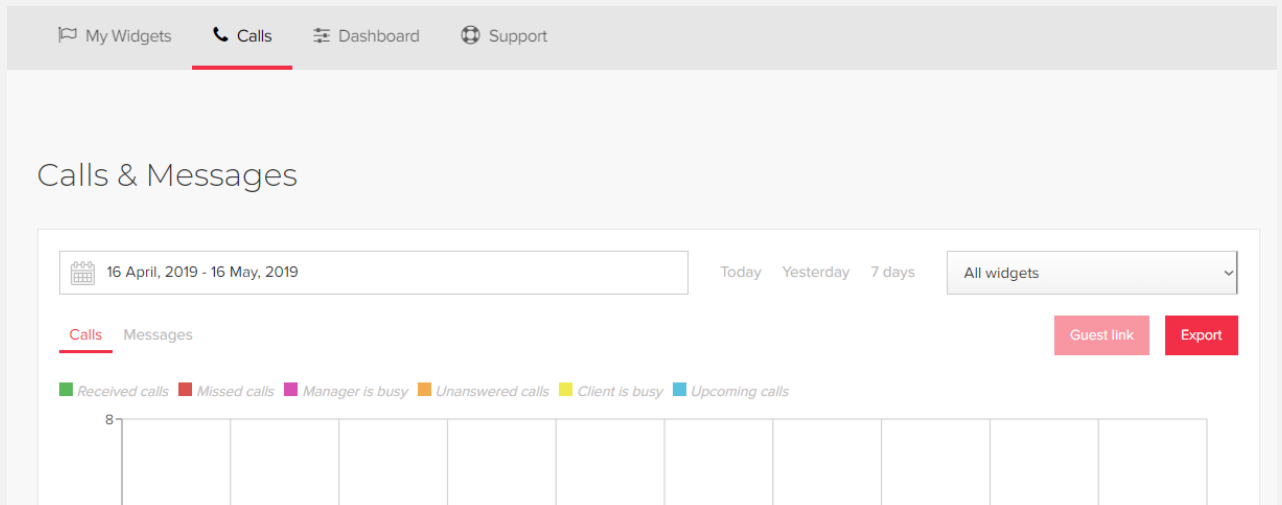
Send code to developer

Send instruction to install widget to your developer:

Send

"CALLS"

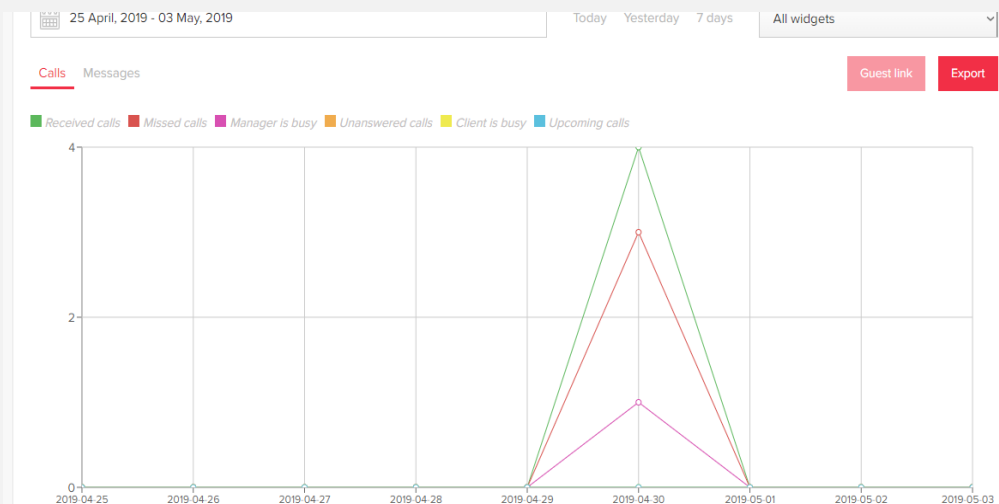
All the data regarding the calls and messages received is available in the **"CALLS"** menu:



In this part of the menu you will see the statistic of the following:

- Received calls
- Missed calls
- Manager is busy
- Unanswered calls
- Client is busy
- Upcoming calls
- Messages

You get the general information in the form of a graphic:



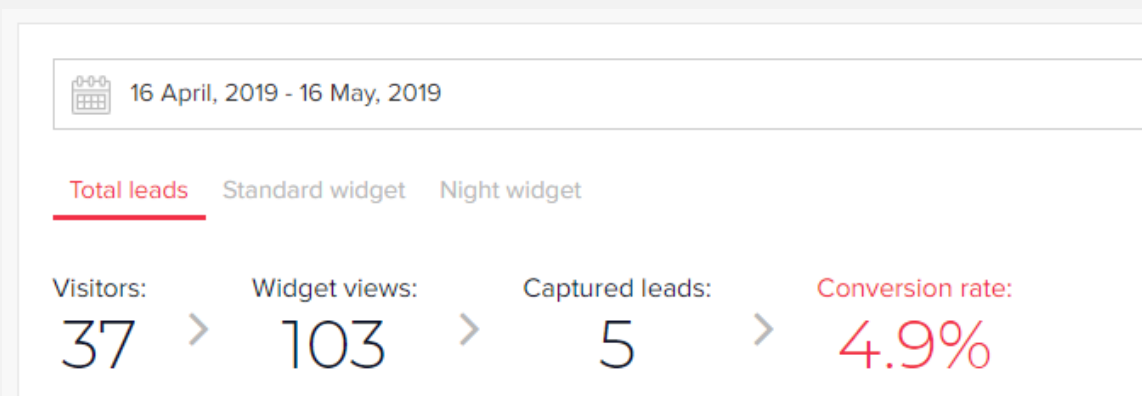
The complete information for each call is available above, here you can see all the call details, such as the website where the widget is installed, date of the call, the time, call status, exc:

Nº	Site ↓	Date ↓	Time (+02:00)	Name ↓	Contacts ↓	Status ↓	Manager ↓	Rate ↓	Source ↓	Region ↓	Record
1	encotec.es	2019-04-30	13:55	—	34687241233	Missed calls	—	—	—	Málaga, AN, Spain	—

“DASHBOARD”

In the “**DASHBOARD**” Menu you obtain the important information regarding the widget traffic. You get the statistics regarding:

- Visitors
- Widget views
- Captured leads
- Conversion rate



The details of the “captured visitors” the triggers set for the widget is available as well:

<p>⏱ After X seconds</p> <p>views: 44 > captured: 1 > conversion rate: 2.3%</p>	<p>🔍 After browsing X pages</p> <p>views: 8 > captured: 0 > conversion rate: 0%</p>	<p>👤 Exit-intent</p> <p>views: 22 > captured: 0 > conversion rate: 0%</p>
<p>🔄 Returning visitors</p> <p>views: 0 > captured: 0 > conversion rate: 0%</p>	<p>👤 Button click</p> <p>views: 29 > captured: 2 > conversion rate: 6.9%</p>	

“SUPPORT”

Please contact us via “**SUPPORT**” menu by submitting the form:

My Widgets

Calls

Dashboard

Support

Contact us

Welcome to ConvertCall Customer Success!

We're available 6:00 AM – 6:00 PM PT, Monday through Friday.

We do our best to respond to each request with a personalized reply within **24 business hours.**

Your ConvertCall account email

What do you need help with?

Select one...

Subject

Message

Message

Upload File

Max file size 10MB.

or write to support@convertcall.app