Virtual Spirits control panel V5

Tutorial

let's get started

Document version 5.4

In this guide, you'll learn how to:

1. Design my chat agent

2. FAQ and scripts of my chat agent

3. The "Live" area

4. Change my chat agent settings

5. Get reports for my chat Agent

1. Design my chat agent

Agent Design allows you to change and modify the way your chat agent appears to your visitors.
We highly recommend you to design your chat agent in order for it to match your website's design.

1. Login to your control panel and go to "Design"
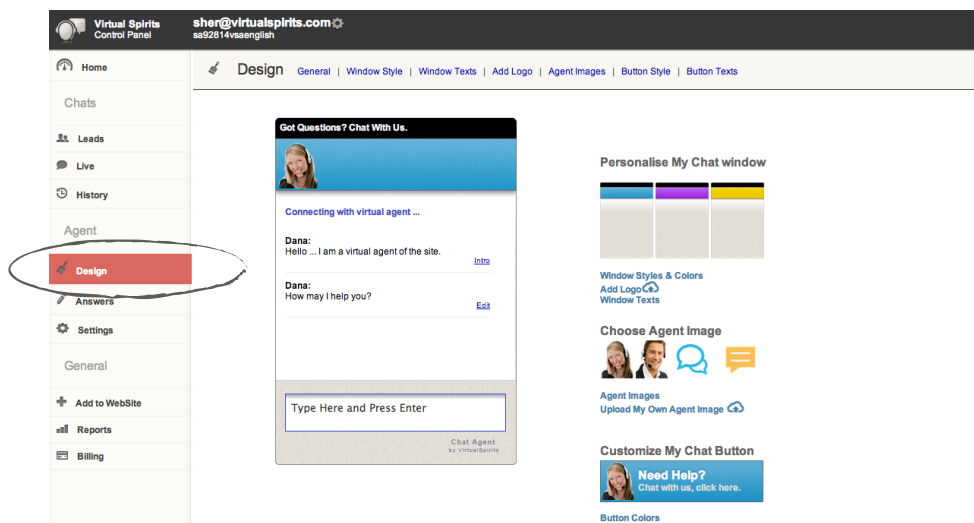
How can I change my Agent's Window Style?

1. In "Design" click on "Window Style"
2. click on the style you want to use from the "Window Style & Color" templates.

How can I change the Window Text?

Window Text refers to all the text on the chat window, this option allows you to change all the text that appears on the chat window. We highly recommend you to test different text to see what gets you the best results.
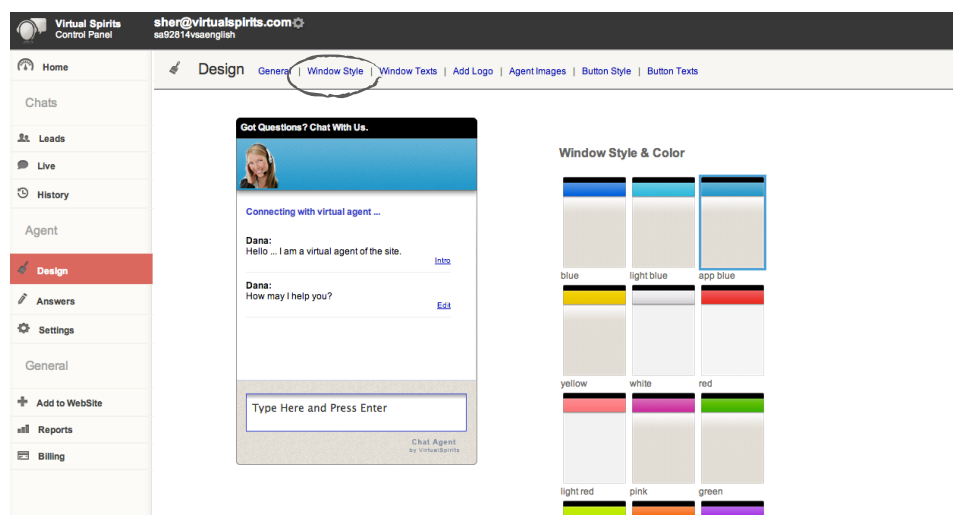
1. In "Design" click on "Window Text" then change the window text by editing the default text. Below you can see all the fields you can change and their location on the chat window.
2. Click on "Save Changes" when you finish.

Change Window Texts

Agent Display Name
Dana

Agent Writing Notice
Dana is typing ...

Chat Header/Title
Got Questions? Chat

Connecting Message
Connecting with virtu

Textbox "Type Here"
Type Here and Press

Chat Footer/Bottom
My company

Save Changes

Got Questions? Chat With Us.

Connecting with virtual agent ...

Dana:
Hello ... I am a virtual agent of GoodFlowers

Intro

Dana is typing ...

Type Here and Press Enter

My company   Chat Agent
                                              by VirtualSpirits

How can I change the Button's color?

Button Style refers to the button background color as well as the text color.

1. **In "Design" click on "Button style"** and then click on the style you wish to change.
2. **Customize colors-** this option allows you to customize your own color, to do so click on EDIT. This will allow you to change the button text color as well.
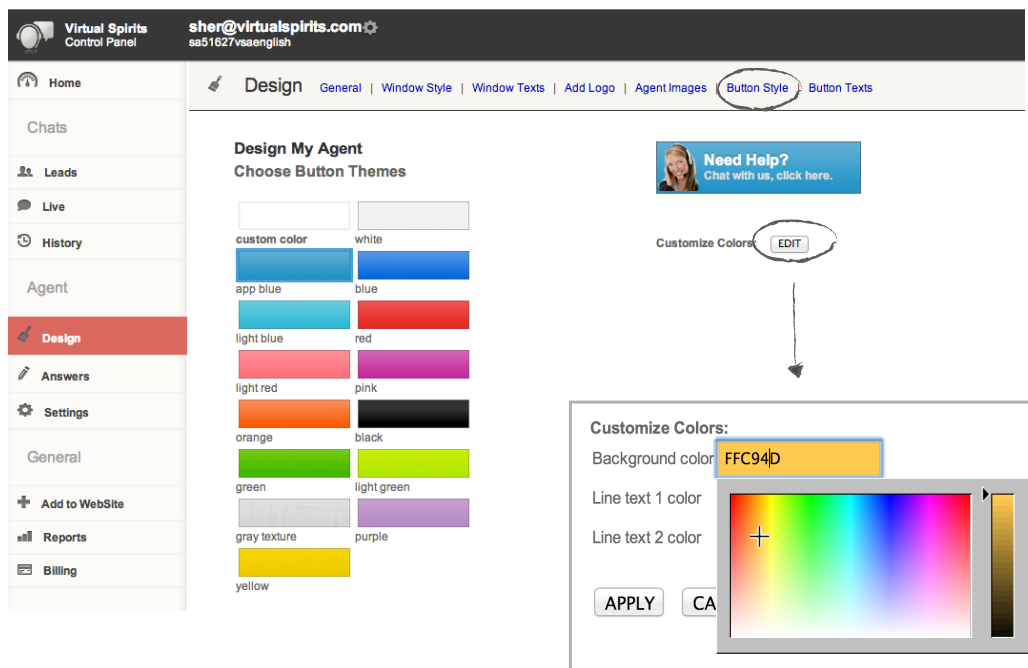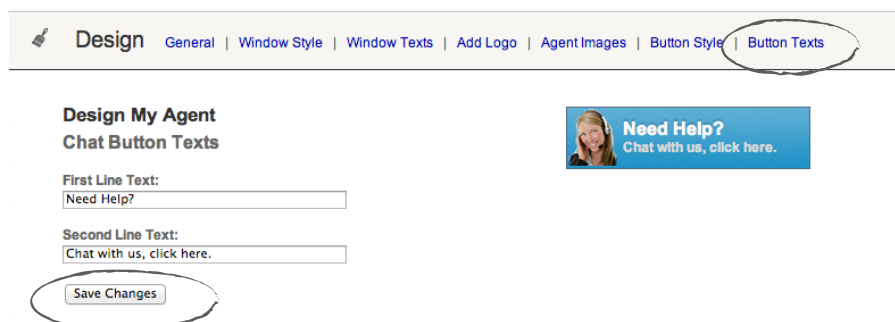

How can I change the Button's text?

Button text refers to all the text on the chat button.
We highly recommend you to test different text to catch the eye of your visitors.

1. In "Design" click on "Button text" then change the window text as you wish.
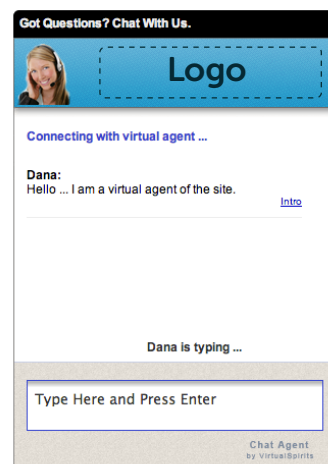2. Click on "Save Changes" when you finish.

How to add my company LOGO

The Company LOGO option allows you to add your company LOGO to the chat window and remove it at any time, this will make your chat part of your website and your company.

1. In "Design" click on "Add logo"
2. Upload your logo by clicking on "Choose File"
   The logo must be a JPG, JPEG, PNG, or GIF extensions.
   Maximum logo size: 50KB.
3. Click on "Upload Picture" and view your logo. (you can remove it at any
   time by clicking on "none")

How to change the agent's image

Agent Images refers to the picture/icon that appears on the top left side of the chat window. You can choose the agent's picture/image from the list or upload your own

1. In "Design" click on "Agent Images" .
2. Upload your own picture- by clicking on "Choose File"
   The picture must be a JPG, JPEG, PNG, or GIF extensions.
   Maximum picture size: 50KB.
3. Click on "Upload File" and view your picture.

2. FAQ and scripts of my chat agent

When you first start using your chat agent, you will notice it tries to get the contact information from your visitors by default sentences that were tested on over 10,000 websites.

How can my chat agent provide the relevant information to my visitor?

The questions you see below are the FAQs we found from our customers in different industries, **we highly recommend you to answer these questions in order for the chat agent to provide this important information to your visitors.**

As soon as you provide the relevant information to your chat agent, your agent will provide the given answer to your visitor's question, regardless of how they word the question.

1. Login to your control panel and go to "Answers"
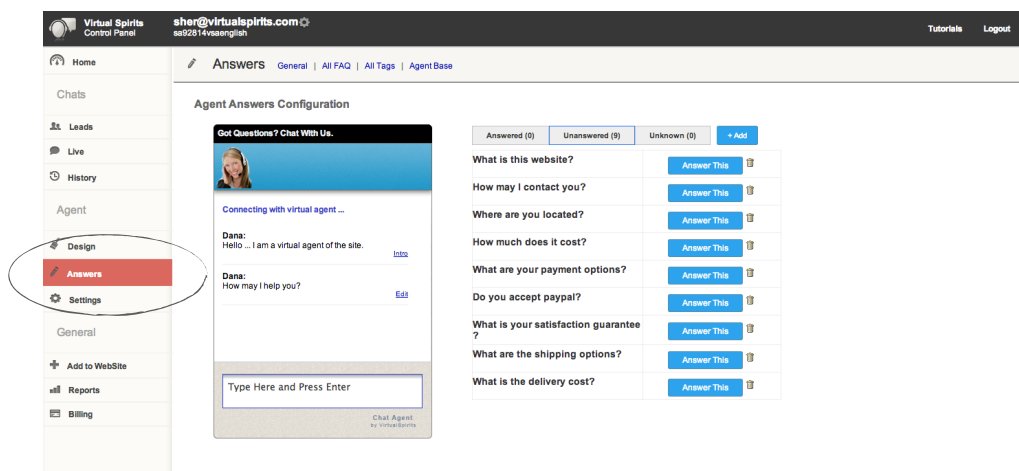
2. Provide the relevant information to your chat agent knowledge base by clicking on: "Answer This" next to each question.

How to change my Agent's Introduction?

Introduction refers to the way your agent approachs your visitors.
By default the introduction starts with an open question: "How may I help you?" Asking an open question in the agent introduction has proven to increase the visitors usage of the chat agent.

1. Login to your control panel and go to "Home" It will allow you to see the agent's responses the same way as your visitors see it.

2. click on "intro"
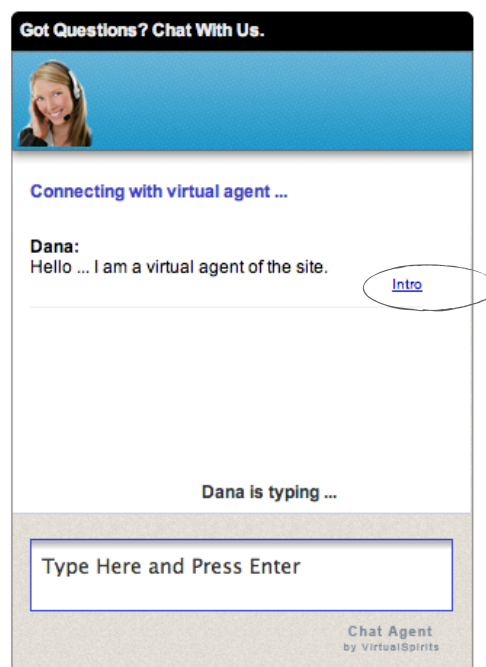
3. Click on "Edit This Response" to edit your new introduction. As you see the introduction contains the greeting sentence and an open question.
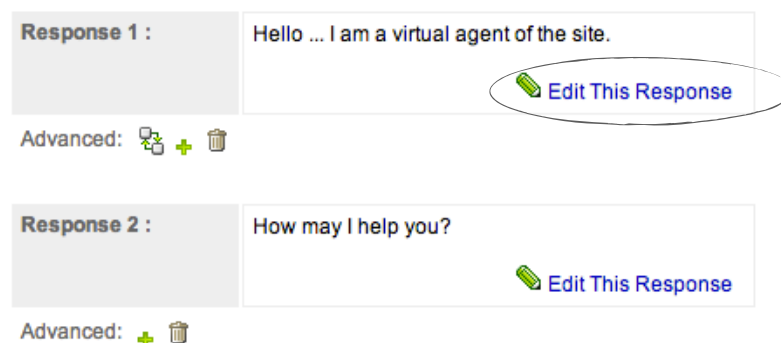
Follow-Up Questions

Follow-up questions, refers to the information you wish to get from your visitors after they leave their Phone number/Email address.

By default your chat agent asks the user 2 questions after the lead is generated (phone number/email address):
1. "Please type in your name"
2. "Feel free to provide further details.."

1. Login to your control panel and go to "Home", there you can see your agent responses the same way as your visitors see it.
2. click on "Edit" next to the question you wish to change.

Got Questions? Chat With Us.

Thank you. I've saved your phone number.

Edit

Dana:
Please type in your name.

Edit

visitor:
Josh

Dana:
Feel free to provide further details ...

Edit

Type Here and Press Enter

Chat Agent
by VirtualSpirits
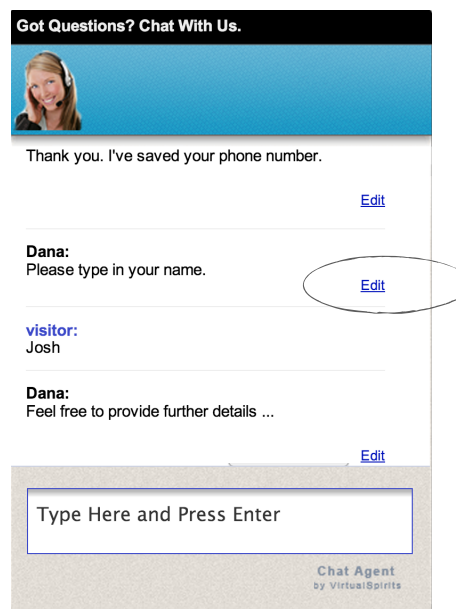
3. Edit the relevant text.
   NOTE: In some of the responses you'll see some code lines (circled below) this should not be changed, change ONLY the text .

Response 1 : Please type in your name.
((context:skipleadgeneration))

✎ Edit This Response

Advanced:

Response 2 : Feel free to provide further details ...
((context:skipleadgeneration))

✎ Edit This Response

Advanced:

Response 3 : ((context:skipleadgeneration))

Edit Response 1 :

Please type in your address
((context:skipleadgeneration))

Save   Cancel
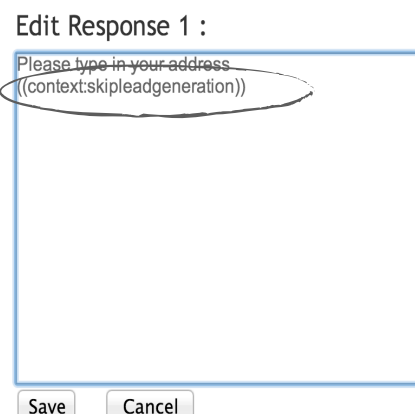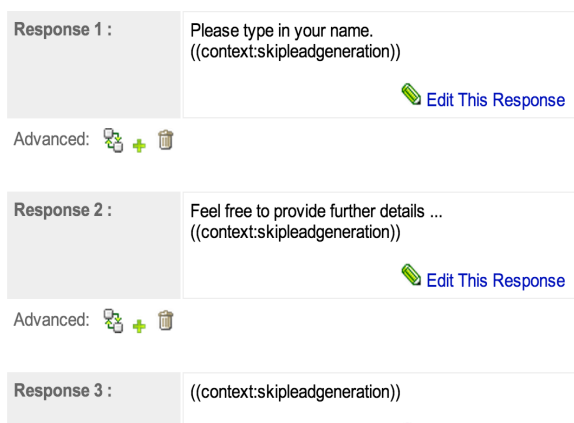
Tags

Tags are labels that you must add to a FAQ so that your agent can understand what is the intended meaning of that FAQ and when it should use it to answer a visitor's question. This technique is similar to tagging videos, photos, emails on Youtube , Facebook or Gmail.

You must add for instance tags "price" and "shipping" to an FAQ like "What is the cost of shipping?" Later if a visitor asks anything about shipment fees he/she will get that FAQ.

Each tag is a group of keywords and you can add/remove/change them. So for instance the tag "price" should contain keywords "price, cost, pricing, fee, rate"

Note: the automated chat agent comes with all the popular tags already configured, and recommends on its own relevant tags when you create a FAQ.

To view the tags your agent knows:

1. Log in to your control panel and go to "answer"

2. Click on "All Tags", then you'll see all the Tags your agent knows.

Example: *If you added the Tag "buy" to your question, such as" How can I buy this?" . No matter how the visitor word this question, as long as your visitor used one of the words that are in the Tag "buy" the agent will provide the relevant answer to you visitor. For example, if the user asked: "where can I place an order?" the agent will provide the answer that you provide to the question "How can I buy this" because "place an order" includes in the Tag "buy"*

How to create a new Tag?

Create new Tags for keywords that are relevant to your business.

For example: if I have a website that sales flowers , I must add a tag called "flowers" which can includes: flower,flowers,rose,roses

1. Go to "answer".
2. Click on "All Tags".
3. Click on "Create New Tag"

4. Click on "Save Changes" when you're done.

Tag Name

Type name for the tag, for instance **scuba diving**

flower

Tag Keywords (e.g. Synonyms)

flower
flowers
rose
roses
-wedding flowers

Type seperate keywords one per line, for instance
scuba
diving
deep sea
snorkeling
snorkel

Type negative keywords with "-", for instance
-sky diving

Save Changes

3. The "Live" Area

This software allows both automated chat + live chat features.
In order to use the live chat features you need to go to "Live" area which displays
chats in real-time. While on this page the system will enable you to intervene in live
chats with your visitors.All active visitors chats are displayed including the text that
is entered by the visitors.

You can start to chat live by clicking on "live chat" button next to each visitor.
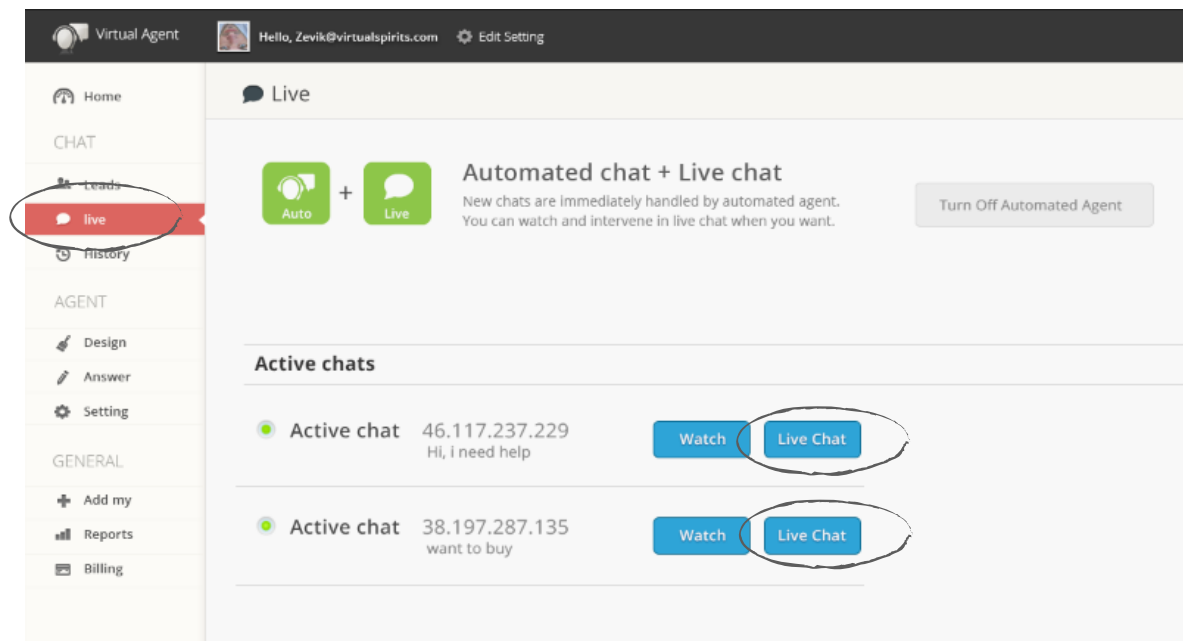
Switching Between Modes

While you are in the "Live" area of the control panel you can switch between
the "Automated chat + Live chat" and "Live chat only" using the relevant
button. This will change the mode for any new chats. Furthermore, when you
leave this "Live" area or log-off, the system understands you are no longer
available to chat live and it will reactivate the automated agent.
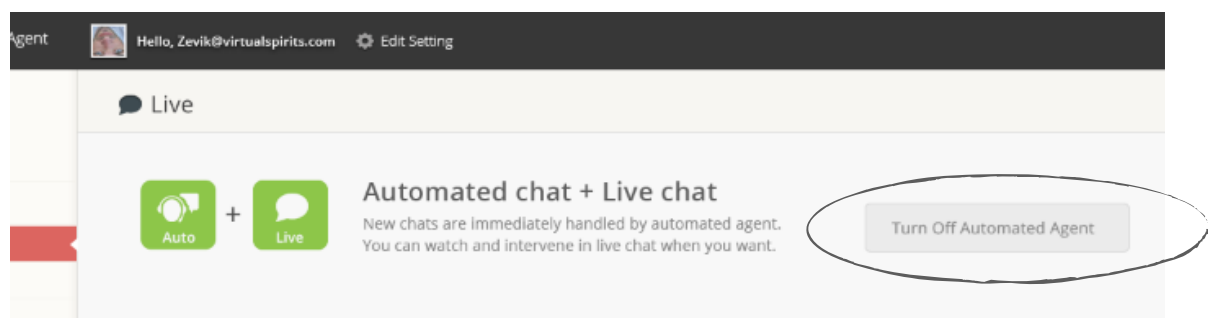
Automated Chat + Live Chat

This default mode means that your Automated Agent is turned on and it engages all your visitors automatically. You can watch the chats between visitor and agent in real-time and decide if you want to start a live chat. As soon as you click on "Live Chat" you are starting to chat with this specific visitor instead of the automated agent. The automated agent continues to chat with your other visitors while you are personally handling the visitor you selected for live chat.
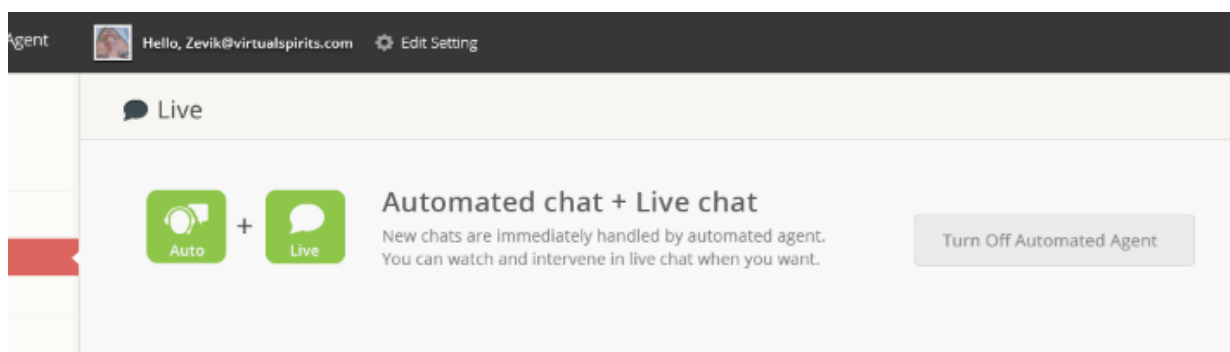
Live Chat Only

You can choose to turn off the automated agent by pressing on the button. This brings you to "Live Chat Only" mode in which the automated agent no longer chats with any new visitor. All new chats must now be handled by you personally or they will not receive any answers. This mode can be used when you decide you do not want the automated chat agent to handle any of the visitors.
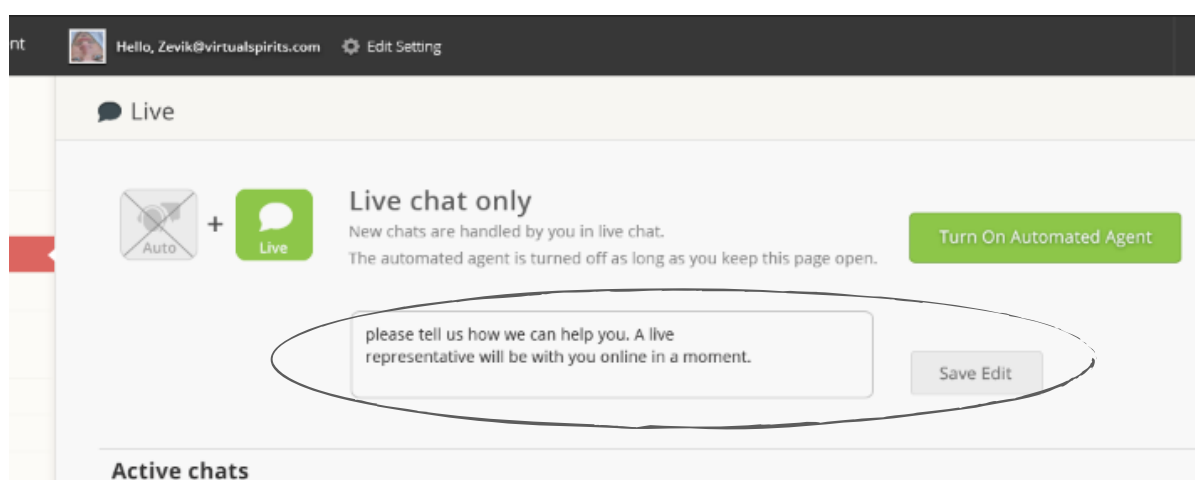
TIP: You can personalize the message prompted to the visitor in "Live Chat only" mode from the textbox in this page.

4. Change my chat agent settings

How to change the chat positioning on my website?

Chat window / button position refers to the location on your page which the chat appears to your visitors, by default the chat location is on the left side, we found it to be the best location based on the conversion rate.

On some websites, the navigation bar or other things are located on the left side as well, those sites can change the chat positioning.

1. Login to your control panel and go to "Setting"
2. Click on "Positioning" this will allow you to change the chat window position and the button position based on your website needs
3. After you finish changing click "save changes"

How to add or change the email address that receives the leads

Every time your agent generates a lead for you, the lead is stored in your control panel and sent to your email address, the default email address is the one you opened the account with. You can change this address or add as many email addresses to receive the leads.

1. In "Setting" , then click on "Email For Leads"
2. Insert as many email addresses as you wish,
   NOTE: separate the different email addresses with " ; " no space.
3. Click on "Save Changes".
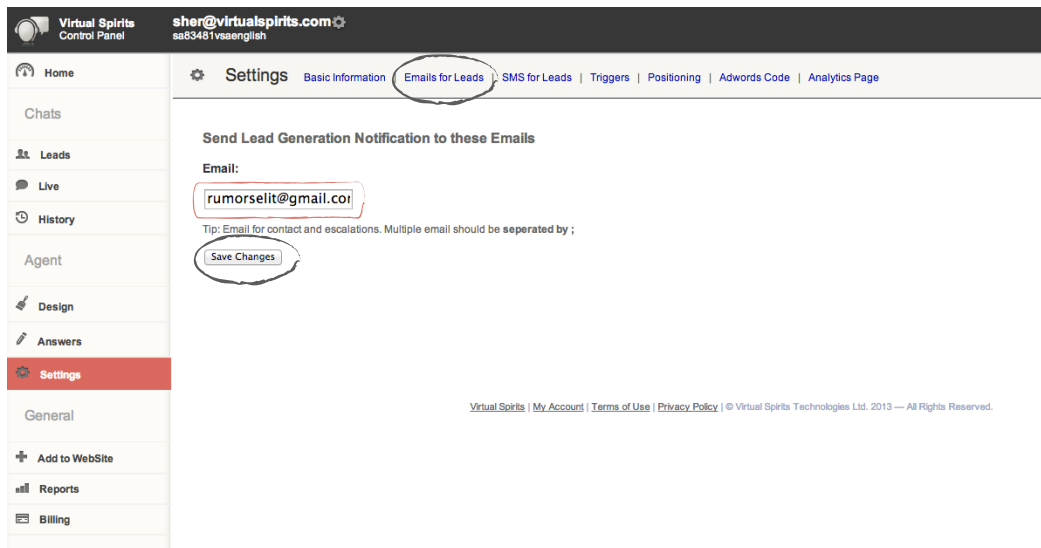
How to add Adwords code for google conversion on Lead Generation

Every time your agent generates a lead we will load this code for you. Note: It can take up to 48 hours in your AdWords statistics.

1. In "Setting" , then click on "AdWords Code"
2. Copy & Paste your AdWords code into the text field.
3. Click on "Save Changes".
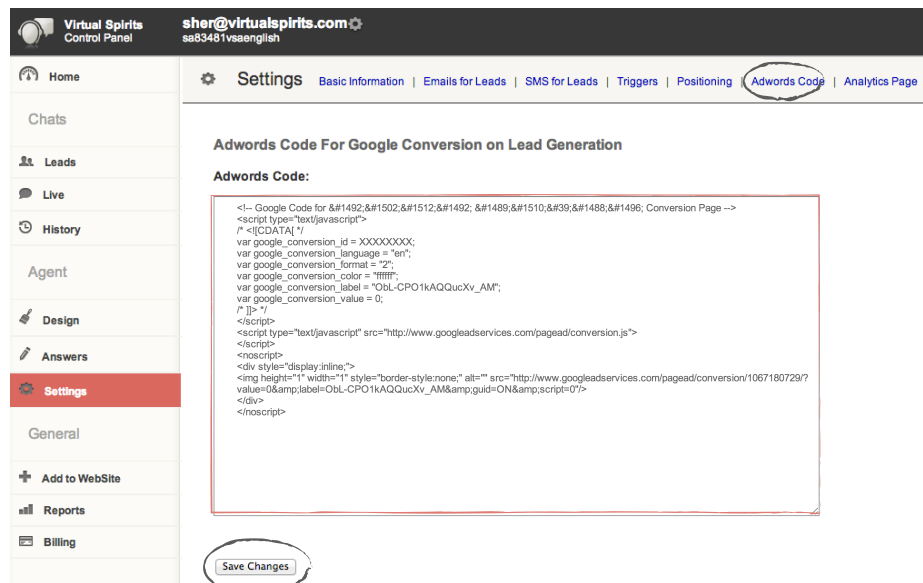
How to add Google conversion code to Lead Generation?

Every time your agent generates a lead we will load your thank you page that contains your Google Analytic code.
NOTE: We won't show this page to your visitors.

1. In "Setting" , then click on "Analytics Page"
2. Copy & Paste your "thank you page" URL.
3. Click on "Save Changes".
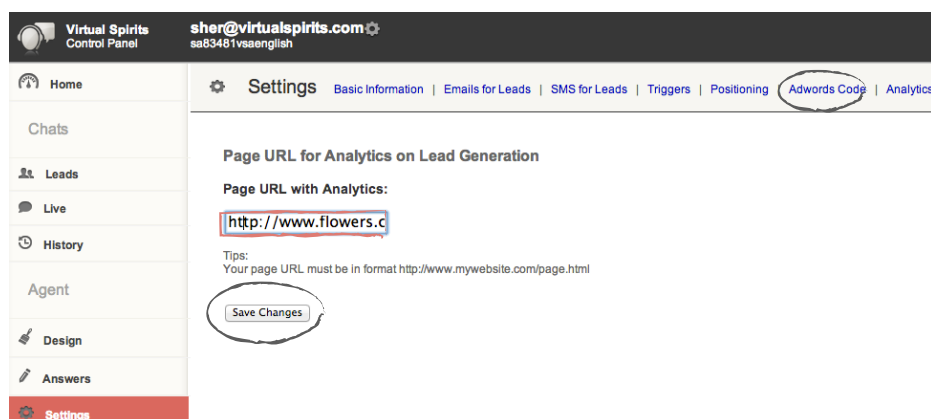
How to change the triggers?

Triggers refers to the different ways in which your chat agent automatically opens to the visitors.

Timed Trigger- The chat window opens automatically after the user is on the page (Timer Second).

Exit Trigger- When the user exits the page the chat opens automatically, the exit trigger is activate after (Minimal Seconds)

1. In "Setting" , then click on "Triggers"
    Status: This allows you to enable or disable the trigger.
    Timer Second: This allows you to change the timer of the Timed Trigger.
    Minimal Seconds: This allows you to set when the Exit trigger
    becomes active.
2. Click on "Save Changes" when you're done.

NOTE: The triggers are aimed at engaging your visitors when they arrive at the site. This means that they will not trigger the same again on a second or third visit. That is why if you have changed the triggers and you want to see the effect on your website yourself, you will have to clear your browsing history and cookies!
If you do not do that, you are not seen by the agent as a first time visit, and the trigger will not be as you configured above.
Pay attention that by clearing cookies, you will be logged out the control panel. So be patient when you are testing the triggers.

How to change the window Dialogue text?

Window dialogue is part of the Exit trigger. It allows you to block the user by showing a message that leads the user for action. If the user clicks "OK" the chat window will open and push the user for action.

1. In "Setting" , then click on "Triggers"
   Status: This allows you to enable or disable the trigger.
2. Click on "Save Changes" when you're done.
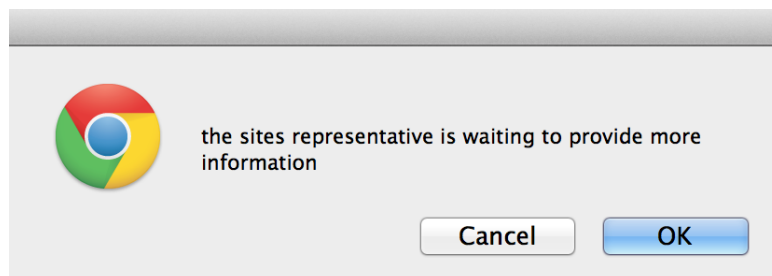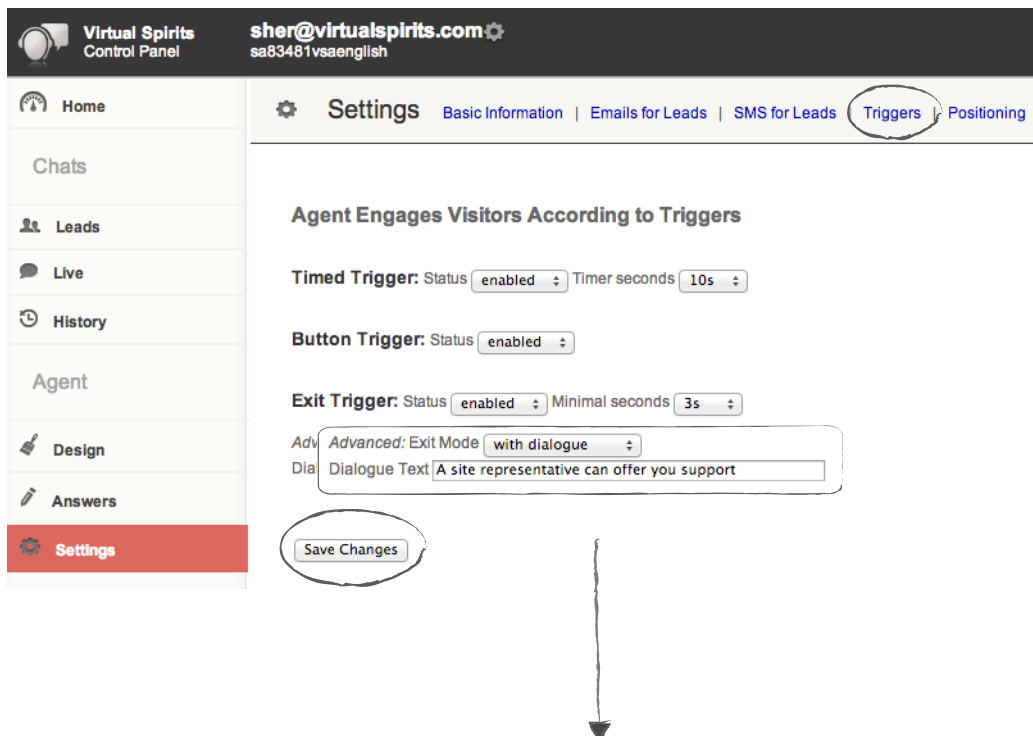
NOTE: You can remove the dialogue window at any time by changing the "Exit Mode" to: without dialogue.

5. Get reports for my chat Agent

Where can I find the reports?
Virtual Spirits reports are the detailed and informative lists of the leads that your agent generated for you, as well as statistic information related to your chat agent.

1. Login to your control panel and go to "Reports"
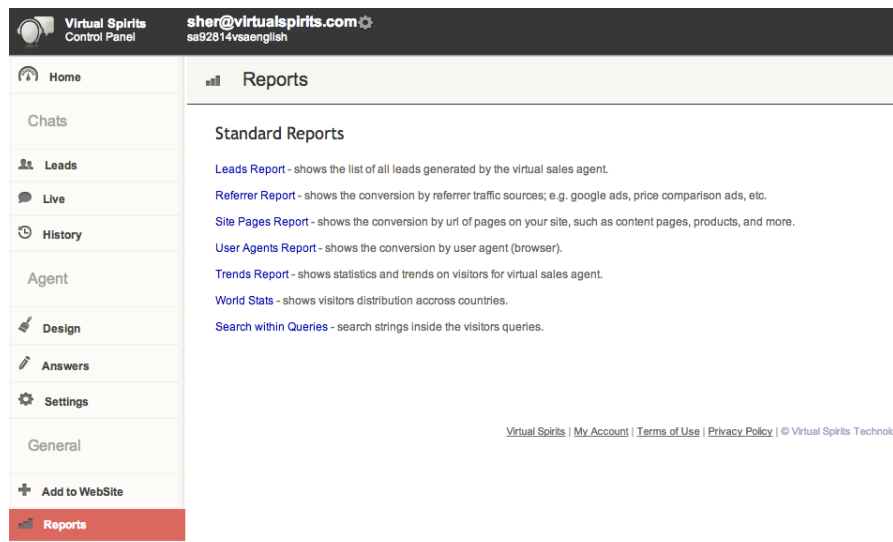
How can I export my leads to an excel file?

Leads Report provides all the information regarding the leads your agent generated for you.

View- allows you to generate the leads for: today, last 2 days, last 7 days and by month.
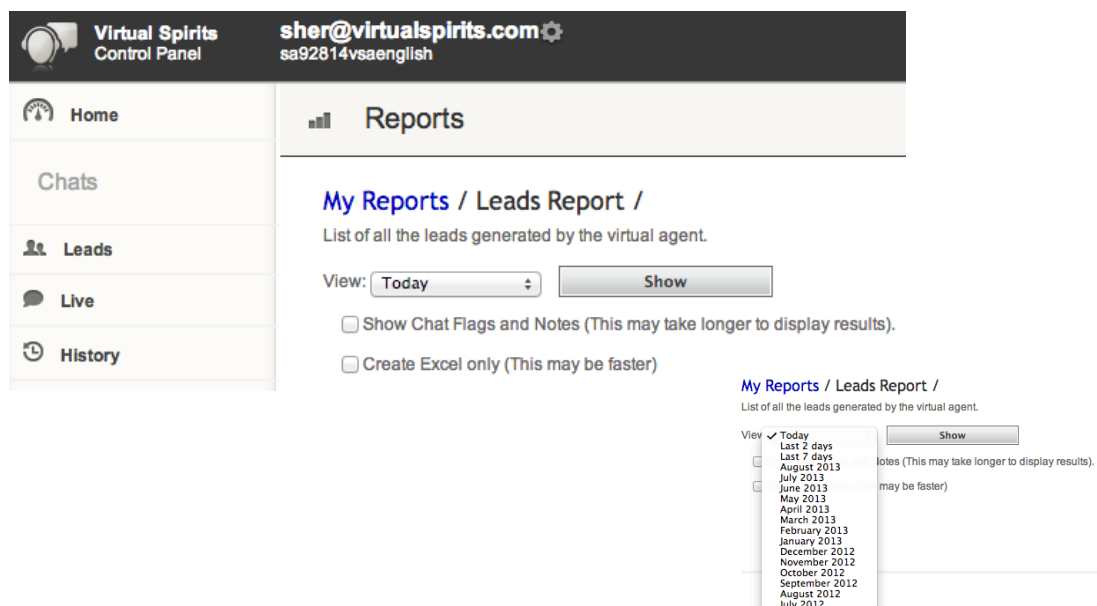
How can I know how many visitors chat with my Agent?

Trends Report provides you information and statistics regarding the way your visitors are using the chat agent.
Unique to Chat- Shows you how many unique visitors view the chat window.
Real- Shows you how many visitors chat with your agent
Conversion All- Shows you how many leads your agent generated.

This report can show you the improvements your agent had based on the changes you made

Example 1: How to check if my new introduction is better than the old one?
Introduction refers to the way the agent approachs your visitors, so if you created a great introduction you will see that the Real increased because your introduction made the visitors start chatting with the agent.

Example 2: How can I check if my new button text/design is better than the old one?
Button text and design are what your visitor sees on your site, if your button is more attractive more visitors are going to press on it which will increase your Unique to Chat.

Date	Unique to Chat	Real	ratio%	Conversion All	ratio%
1-5-2013	474	58	12.2%	53	91.4%
2-5-2013	359	54	15%	32	59.3%
3-5-2013	2	0	%	0	%
5-5-2013	196	28	14.3%	21	75%
6-5-2013	249	39	15.7%	24	61.5%
7-5-2013	84	12	14.3%	12	100%
8-5-2013	177	34	19.2%	26	76.5%
9-5-2013	245	48	19.6%	30	62.5%
10-5-2013	54	13	24.1%	11	84.6%
11-5-2013	1	0	%	0	%
12-5-2013	459	66	14.4%	39	59.1%
13-5-2013	87	22	25.3%	13	59.1%
14-5-2013	176	26	14.8%	16	61.5%
16-5-2013	141	31	22%	24	77.4%
17-5-2013	108	14	13%	9	64.3%
18-5-2013	1	1	100%	1	100%
19-5-2013	578	68	11.8%	52	76.5%
20-5-2013	245	37	15.1%	26	70.3%
21-5-2013	290	36	12.4%	22	61.1%
22-5-2013	513	69	13.5%	51	73.9%
23-5-2013	400	62	15.5%	35	56.5%
Total	4839	718	14.8%	497	69.2%

In summary

Over the course of this tutorial, we hope you've enjoyed learning about how to configure the automated chat agent and use the various options at your disposal.

Use these features to make your automated chat agent smarter and you'll find that it is the best companion for growing your business, save money and get more customers.

If you have additional questions we are here to help you.

Send us an email: **support@virtualspirits.com**