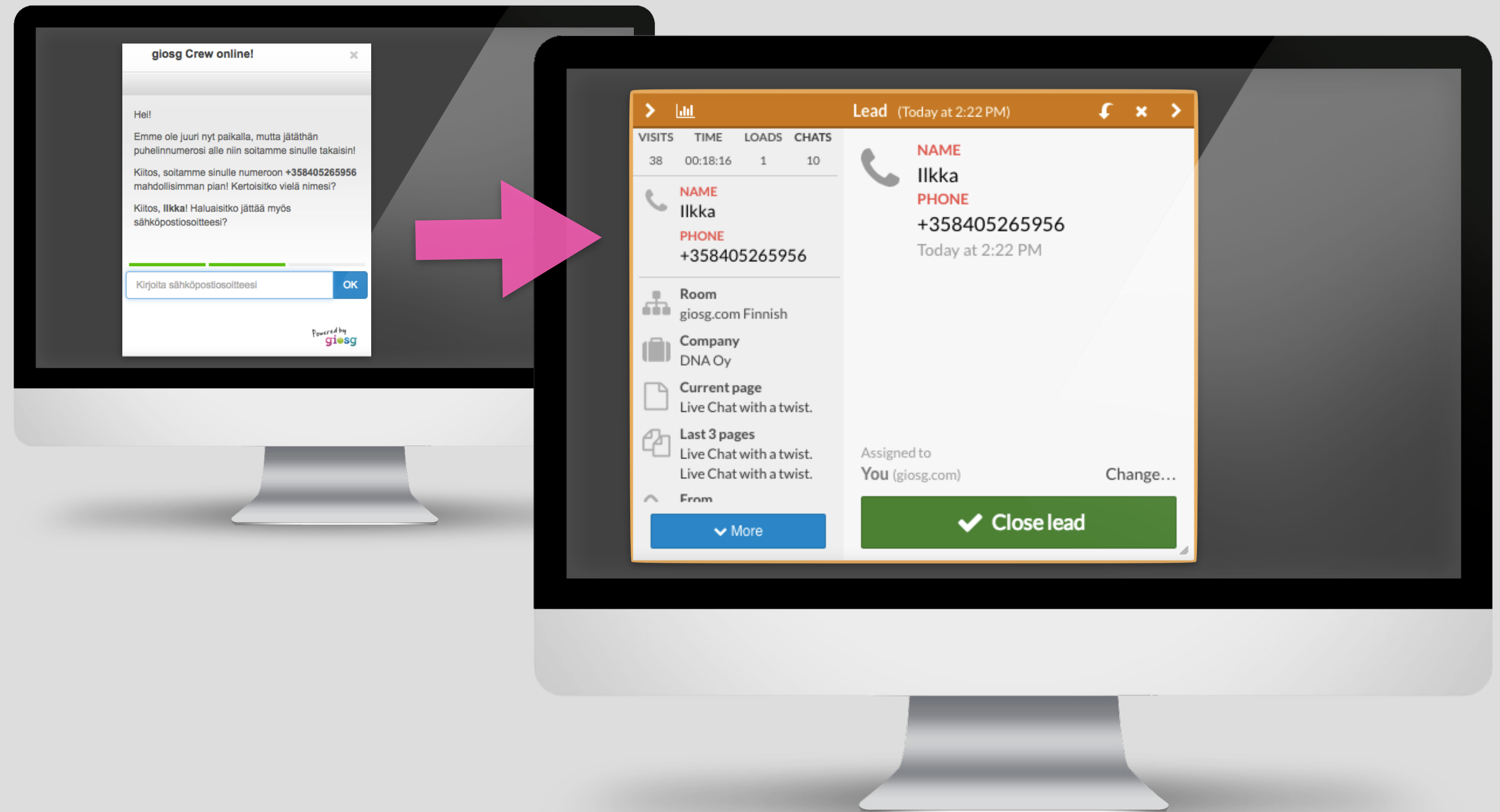


giosg LEAD CALL Manager user guide



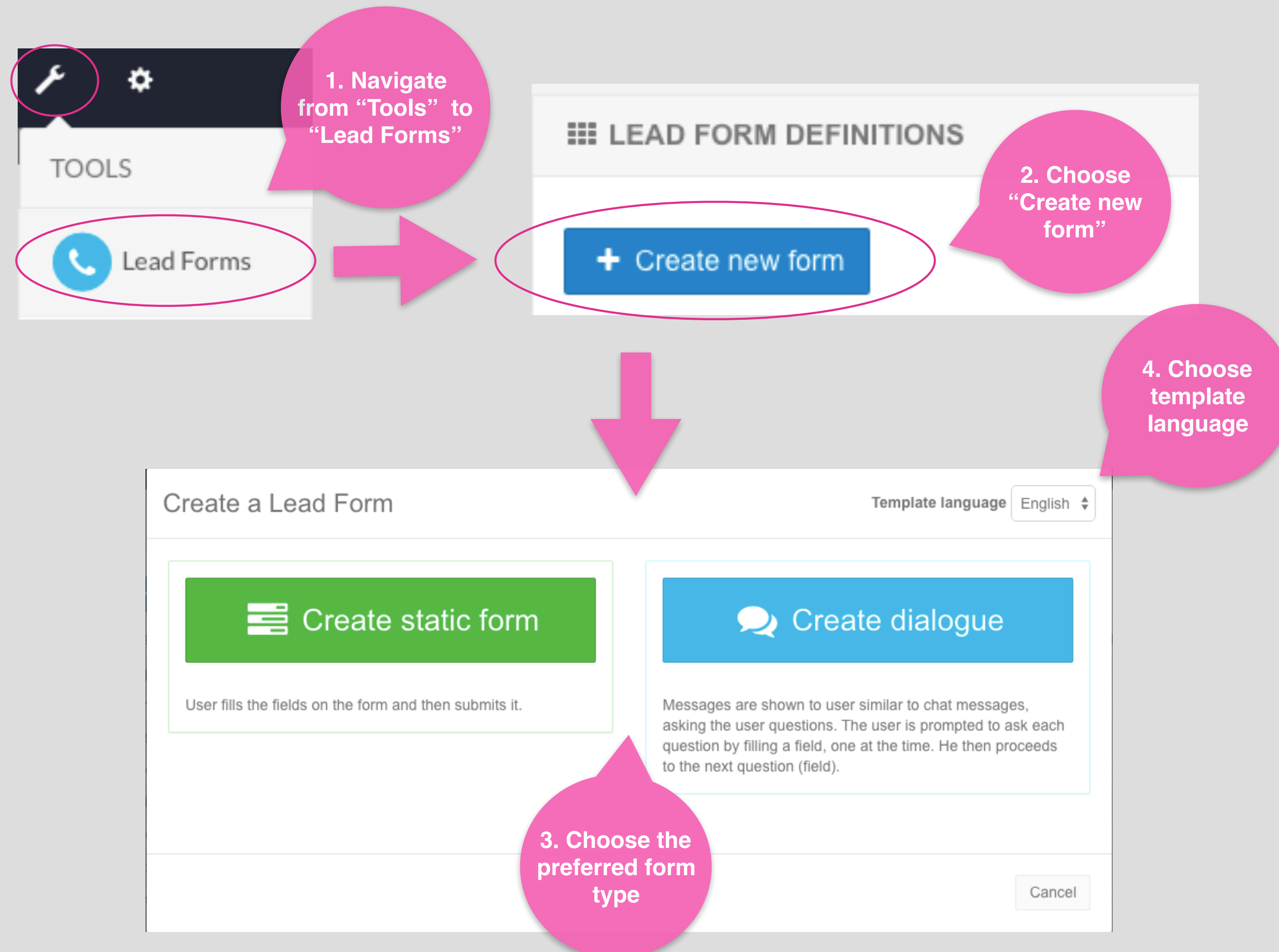
Giosg LEAD CALL

- Giosg LEAD CALL collects your customers' contact information from your website
- Giosg LEAD CALL greets your customers automatically when chat resources are unavailable and collects their contact details



Creating lead forms

- You can create new lead forms & edit existing ones on the Lead Forms tab from tools menu
- Choose the form type: Static form asks all the questions in one window and dialogue asks the questions one at a time



Here you can change the form type

Look & feel

giosg

Close

← Back

New Lead Form: test

Business Information

User Interface

Look & feel

Data

Form

Dialog

General form customization

▶ Form body

▶ Form contents

▶ Message loading indicator

▶ Form item

▶ Strong message

▶ Link

▶ Image

▶ Input field label

☒ Use default styling (recommended)

By selecting this option your visitors will always see a properly styled form. Also, your stylesheet will get automatically updated whenever this feature is updated.

☐ Define custom styling (advanced)

Only for advanced use! This option allows you to specify custom CSS properties for the different components of the form. The omitted components will use their default styling. Note that by selecting this option you take responsibility of maintaining the stylesheet yourself when the "Dialog" component is updated.

After saving this form, you can configure your rules to use it!

Save and continue editing

✓

Save and close

You can customise CSS properties for different components of the form (advanced styling)



**Finally, save
& close the
form**

Creating a rule for the lead form

- The lead form needs a rule to define when it's shown on the pages
- You can also create a separate “Chat-button” for the lead form
- Directing leads to an e-mail address is also done with rules, contact giosg support for this

The screenshot shows the 'Create new rule' interface. It is divided into three main sections: 'AT THESE ROOMS...', 'WHEN THIS CONDITION MATCHES...', and 'PERFORM THIS ACTION...'. A pink arrow points from the 'WHEN THIS CONDITION MATCHES...' section to the 'PERFORM THIS ACTION...' section.

Annotations:

- Select the room/domain where the lead form is available:** Points to the 'AT THESE ROOMS...' section.
- Name and enable the rule:** Points to the 'SETTINGS' section on the right.
- You can use e.g. “Operators online presence” condition.** Points to the 'WHEN THIS CONDITION MATCHES...' section.
- Select “Show a Lead Form” action and select the Lead Form you want to use for this room:** Points to the 'PERFORM THIS ACTION...' section.

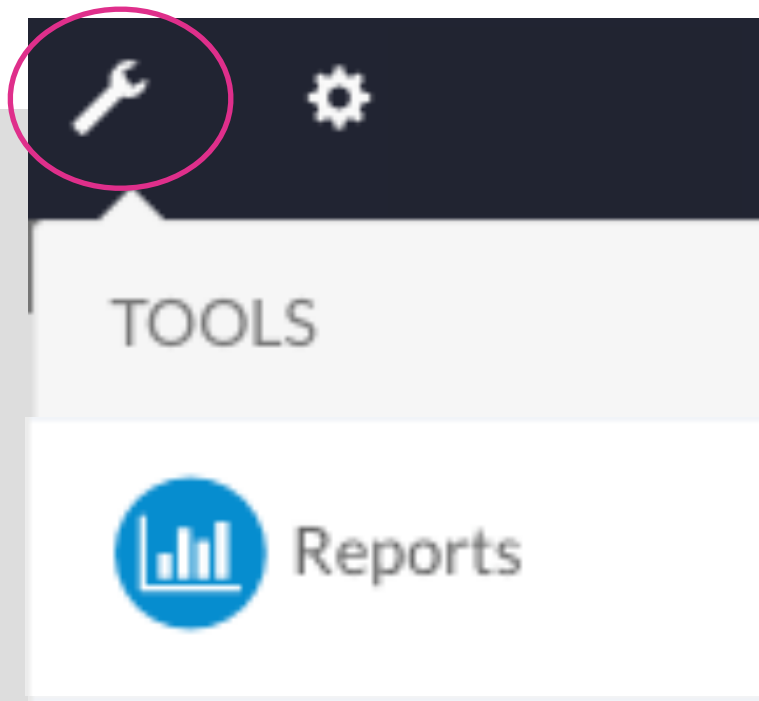
Form Details:

- AT THESE ROOMS...:** Includes a search bar with 'test' and a checkbox 'Use this rule in all rooms'.
- WHEN THIS CONDITION MATCHES...:** Includes a dropdown for 'Operator online presence', a 'When' dropdown, and a dropdown for 'all operators are offline'.
- PERFORM THIS ACTION...:** Includes a dropdown for 'Show a Lead Form' and a dropdown for 'demo'.
- SETTINGS:** Includes a 'Name' field, an 'Enabled' toggle, and checkboxes for 'Rule can match only once on a page', 'Rule can match only once in session', and 'Rule can match only once for visitor'.

Buttons: '+ Add new condition', '+ Add another action', and 'Save changes'.

Lead amount reporting

You can follow the lead amount from the "leads"-tab in reporting



Choose the timeframe

Choose which room's lead amount you wish to view

May 28 2016 - Jun 3 2016

giosg.com FIN









✓ Make default room

LEADS



Lead amounts are shown for each day of the selected timeframe

Lead reporting

	Real Time
	Daily statistics
	Sales
	Leads
	Operators ▶
	Visitors ▶
	Rules Beta
	Exports

Under
Exports you can
export lead
reporting

Choose from which Lead Form you want the report

Choose the timeframe

Choose which room's lead reporting you wish to export

EXPORT REPORTS

Available exports

- Chat logs >
- Total statistics >
- Leads >

Choose Lead Forms to export ✕ all

- ☒ Lead Form, returns from form page
- ☒ Lead form demo for blog (PV)

Download

[CSV](#) [XLSX](#) [TXT](#)

Choose the file format and the download begins

Thank you!

Visit our pages and we
can continue
discussion:

www.giosg.com

A black and white photograph of four women sitting on a concrete staircase. The woman on the far left is sitting on the lowest step, leaning against the wall, wearing a light-colored button-down shirt and dark pants. The woman next to her is sitting on the second step, wearing a dark sweater and dark pants. The woman in the back is sitting on the third step, wearing a dark top and dark pants. The woman on the right is sitting on the fourth step, wearing a dark sweater, light-colored jeans, and glasses. A large, colorful logo 'giosg' is overlaid in the center of the image, with the 'g' on the left in pink, 'i' in purple, 'o' in green, 's' in blue, and 'g' on the right in green. The staircase has a metal railing with a chain-link fence on the right side.

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