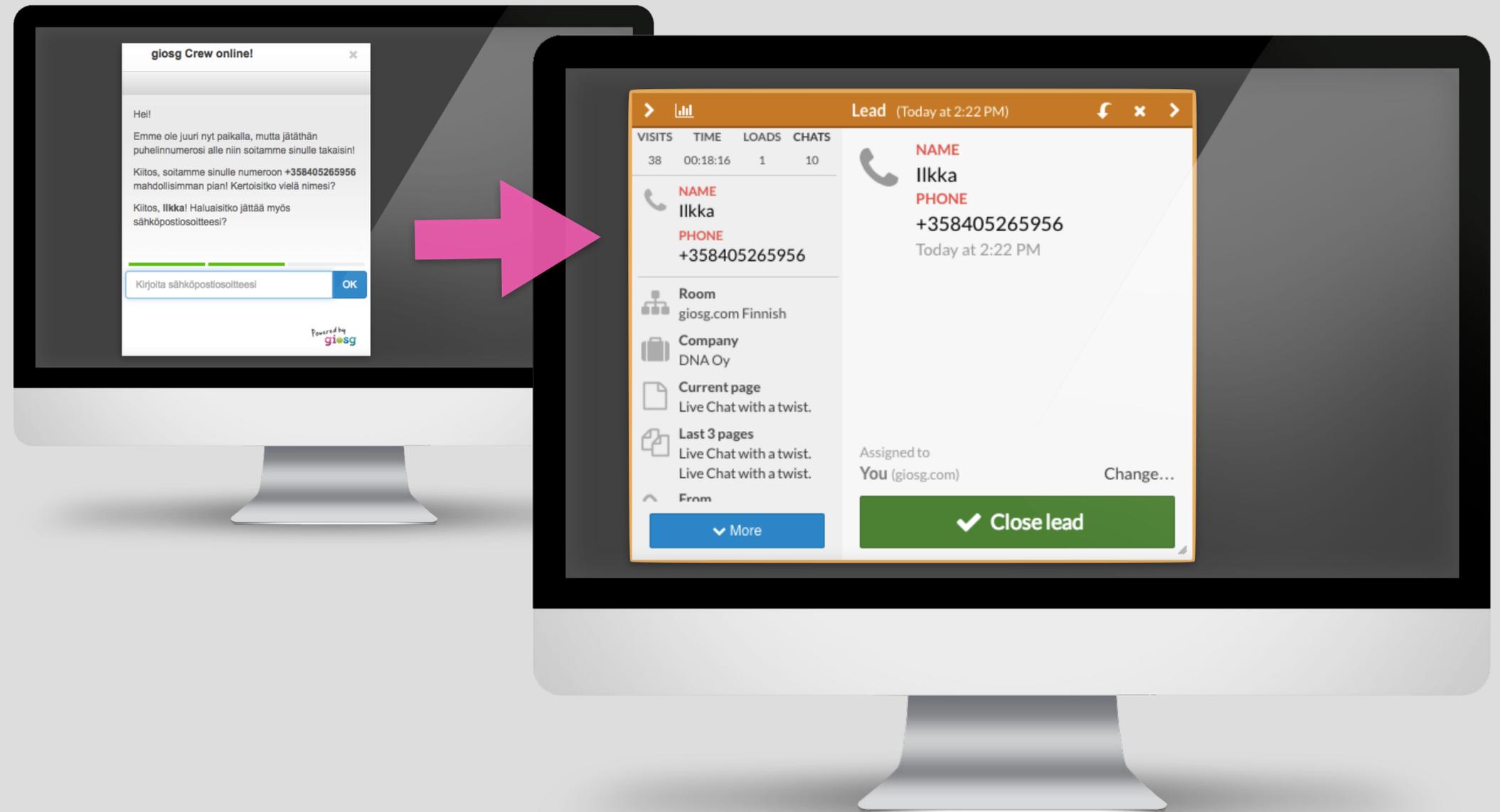


# giosg LEAD CALL user guide



# 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



# Customer leaves contact information

- Giosg LEAD CALL asks customers for contact information (e.g. phone number, name & e-mail)
- Contact information is asked either one by one or all in a single window

**Contact Us** ×

Hi there!

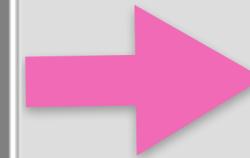
Unfortunately all of our personnel are currently unavailable. Please give us your contact information and we will contact you shortly!

First, please give your phone number. Starting with your country code.  
(Example +44)

**Your phone number**

Type your phone number

giosg



**Contact Us** ×

(Example +44)

Thank you! If you would like to give your name, please write it here.

Thanks! Finally, please type in your email address.

Thank you very much! We will contact you shortly!

giosg

# Picking up leads

- The lead is shown on the swim lane as a golden bubble that moves to the right end of the swim lane.
- The lead-card opens up when you click on the bubble.

The screenshot displays the Giosg interface. At the top right, the 'giosg' logo is visible. The main area shows a swim lane with a dropdown menu on the left containing options like 'Show all rooms', 'demo.giosg.com', 'facebook.com', 'giosg.com FIN', 'giosg.com UK', 'giosg.com WORLD', and 'test'. The swim lane itself has a header 'giosg.com FIN' with a notification icon and the number '15'. A golden bubble with a telephone icon and the number '17' is positioned at the right end of the swim lane. A pink callout bubble labeled 'New lead' points to this bubble. Below the swim lane, a lead card is open, showing contact information for 'Anna' (PHONE: +3584412345, NAME: Anna, EMAIL: anna@giosg.com) and room information (demo.giosg.com). The card also shows the lead is assigned to 'You (giosg.com)' and has a 'Close lead' button. A pink arrow points from the bubble to the lead card, and a pink callout bubble labeled 'By clicking the lead the lead's information will open' points to the lead card.

Show all rooms ▲ giosg.com FIN 15

Show all rooms  
demo.giosg.com  
facebook.com  
giosg.com FIN  
giosg.com UK  
giosg.com WORLD  
test

Lead (Today at 1:59 PM)

Lead information  
PHONE  
+3584412345  
NAME  
Anna  
EMAIL  
anna@giosg.com

Room  
demo.giosg.com

Company  
Suomi Communications Oy

Lead page  
Businexx - World leader in business!

Assigned to  
You (giosg.com) Change...

More Close lead

New lead

By clicking the lead the lead's information will open

# Transferring leads to a colleague

- Choose “Change” to open up a list of colleagues
- You can assign leads to a colleague by choosing a name from the list
- The lead is assigned to your colleague

The screenshot displays the Giosg CRM interface for a lead. The lead information is shown in a sidebar on the left and a main panel on the right. The lead is currently assigned to "You (giosg.com)". A "Change..." button is visible, which opens a dropdown menu of colleagues. A pink callout bubble points to the "Change..." button with the text "Transfer lead to a colleague". A pink arrow points from the "Change..." button to the dropdown menu, which lists several colleagues: Toni Siikala US, Greg Hardwick, Aleksi Hirvonen, Sam Yaple, Roy Hu, John Smith, Tuire Vataja, Pete Pättiniemi, Ida Vaenerberg, Nick Mellor, Kalle Mäkelä, Jenni Pajukoski, Antti Tapio, and Immo Salonen. The "Close lead" button is visible at the bottom of the lead information panel.

Lead information

PHONE  
+3584412345

NAME  
Anna

EMAIL  
anna@giosg.com

Room  
demo.giosg.com

Company  
Suomi Communications Oy

Lead page  
Businexx - World leader in business!

Assigned to  
You (giosg.com)

Change...

Close lead

information

PHONE  
+3584412345

NAME  
Anna

EMAIL  
anna@giosg.com

Room  
demo.giosg.com

Company  
Suomi Communications Oy

Lead page  
Businexx - World leader in business!

Assigned to  
You (giosg.com)

Change...

Close lead

Transfer lead to a colleague

Toni Siikala US

Greg Hardwick

Aleksi Hirvonen

Sam Yaple

Roy Hu

John Smith

Tuire Vataja

Pete Pättiniemi

Ida Vaenerberg

Nick Mellor

Kalle Mäkelä

Jenni Pajukoski

Antti Tapio

Immo Salonen

# Transferring leads to a colleague

- You can also transfer leads back to yourself:
- Choose take lead to myself

Lead (Today at 1:59 PM)

Lead information

**PHONE**  
+3584412345

**NAME**  
Anna

**EMAIL**  
anna@giosg.com

Room  
demo.giosg.com

Company  
Suomi Communications Oy

Lead page  
Businexx - World leader in business!

Assigned to  
**Ida Vaenerberg** (giosg.com) Change...

Take lead to myself

Lead (Today at 1:59 PM)

**PHONE**  
+3584412345

**NAME**  
Anna

**EMAIL**  
anna@giosg.com

Today at 1:59 PM

Assigned to  
**You** (giosg.com) Change...

Close lead

# Searching for previous leads

- Click on magnifying glass symbol
- Open the lead's info by clicking on the timestamp

Lead (Today at 1:59 PM)

Lead information

**PHONE**  
+3584412345

**NAME**  
Anna

**EMAIL**  
anna@giosg.com

**Room**  
demo.giosg.com

**Company**  
Suomi Communications Oy

**Lead page**  
Businexx - World leader in business!

Assigned to  
**You** (giosg.com) [Change...](#)

More

Close lead

Jutta Giosg

My open leads

10/09/2014

Today at 12:55 PM

Today at 12:55 PM

Today at 12:58 PM

Today at 1:44 PM

Today at 1:45 PM

Today at 1:57 PM

Leads taken by others

Today at 1:57 PM

Today at 1:45 PM

Today at 1:44 PM

Today at 12:58 PM

Today at 12:55 PM

Today at 12:55 PM

10/09/2014

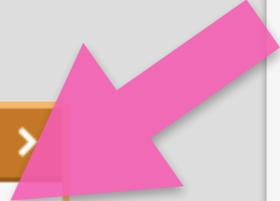
My closed leads

Today at 12:32 PM

10/09/2014

10/09/2014

Choose the lead you wish to view



**Thank you!**

Visit our pages and we  
can continue  
discussion:

[www.giosg.com](http://www.giosg.com)



giosg