

Get started

Store Teams | Getting Started

Get set up for success with Virtual Shopping.

Welcome to Virtual Shopping!

To help you get set up and started seamlessly, we've put together the following pages to guide you through the process and introduce you to the main tools you'll be using to access Virtual Shopping. Check them out!

(1) [Download the Store App](#)

(2) [Take a tour of the Store App](#)

(3) [How to chat with online shoppers](#)

(4) [How do shoppers experience Virtual Shopping?](#)

We recommend reading through the sections in order, starting with making sure you're going to the right place to download the Store App.

Download the Store App

Your key to Virtual Shopping: The Store App

The Store App is a mobile app that allows you to connect directly with online shoppers in the same way you would with shoppers in real life.

Offer advice to online shoppers, make recommendations for products you think they'll love, and generate sales through the connections you make.

We'll take you through the set-up process and take a look at the main parts of the app so that you're familiar with it all and ready to go!

Download the Store App

The Store App is available on both Android and iOS devices.

Please use the following links to go to the correct App Store or Play Store page to download the Store App directly. This is so that you download the correct app from the Klarna family of apps.

[Store App for iOS](#)

[Store App for Android](#)

Once you've downloaded the app, you'll need to enter your unique 7-digit invitation code. Your manager will give this code to you.

Take a tour of the Store App

Getting started

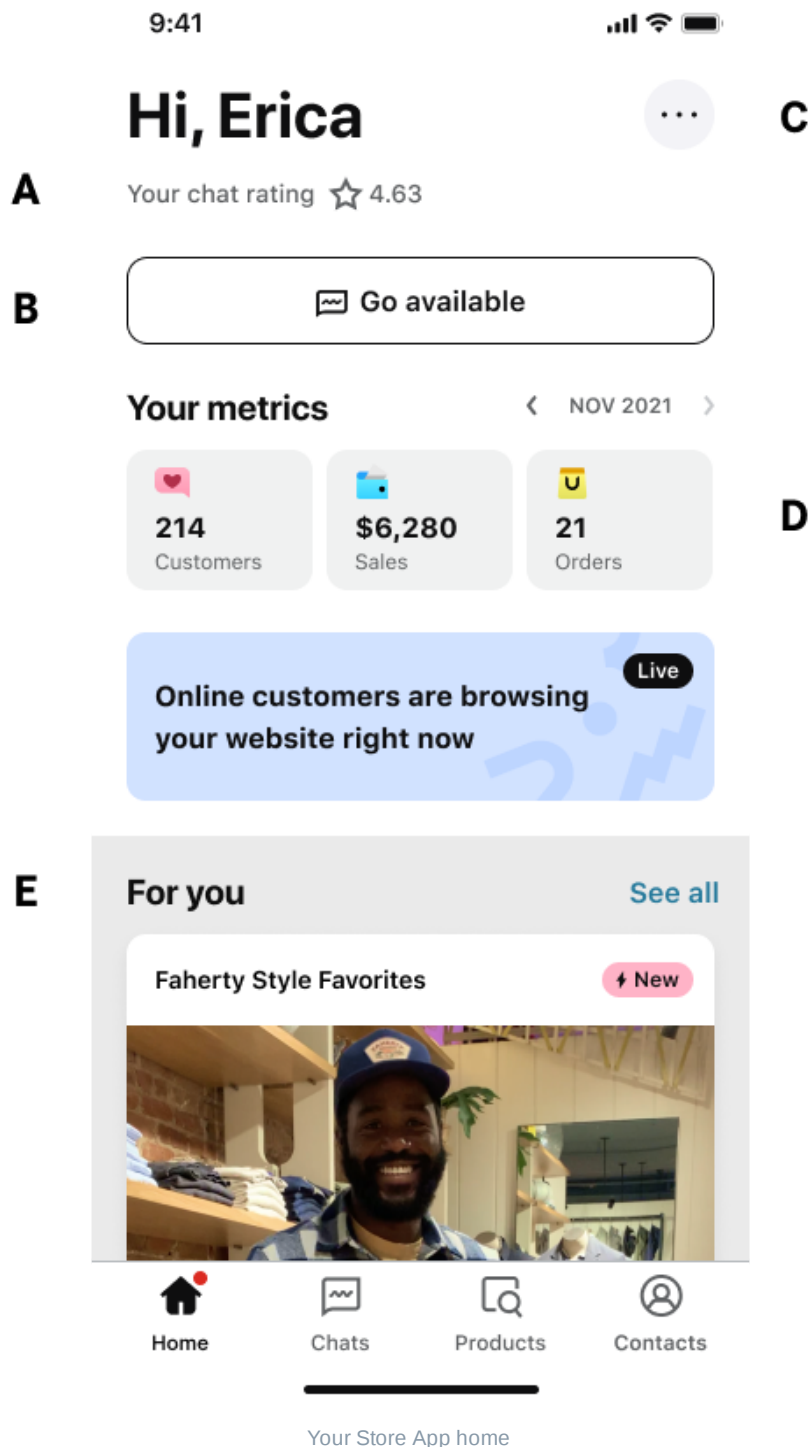
First things first, you'll need to set up your profile so that online shoppers know who they're chatting with.

Once you've been guided through the setup process, you'll be taken through the main features of the Store App, including video calling, product sharing, and contacts (no spoilers here).

We'll then give you a chance to take part in a practice chat. This gives you a chance to get familiar with the interface in which you'll be messaging with online shoppers before you dive in for real. You'll be able to repeat this demo chat at any time from the main app menu in case you need a refresher.

Let's take a look at the different parts of the Store App...

Store App home



This is what you'll see whenever you open the Store App. It's your mission control, so let's break it down:

A – Your average star rating. At the end of every chat, shoppers are able to rate their experience with you out of five. This will give you a rough idea of how you're doing at a glance.

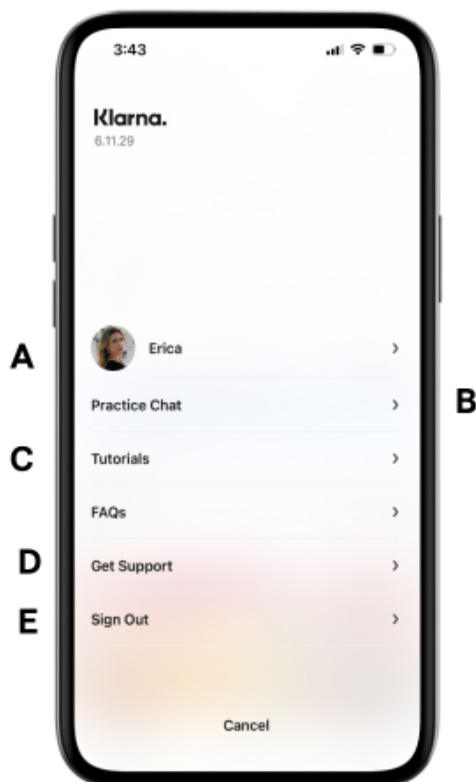
B – Your current availability status. If you've available and ready to chat with online customers (and give them your full attention!), tap this button to go available. You'll start receiving incoming chat requests. Then, when you're no longer available, tap again to set yourself as unavailable.

C – Tapping the three dot icon opens a menu where you can access other parts of the Store App. Here, you can repeat the practice chat, access support in case of issues, and edit your account details.

D – Get a quick overview of your progress with Virtual Shopping. You can also see your numbers for previous months.

E – Here you'll see the latest news, training tips and important updates surrounding Virtual Shopping.

Menu



From Store App home, if you tap on the three dots in the top right corner, you'll open your menu. Here's what you'll find under this menu:

A – Your profile. Change your profile picture and edit your personal details. Remember – any shoppers you chat with will see your picture. It helps the experience feel more personal and reassures them that they're talking to you, a real human! We recommend choosing a professional and clear headshot for this reason.

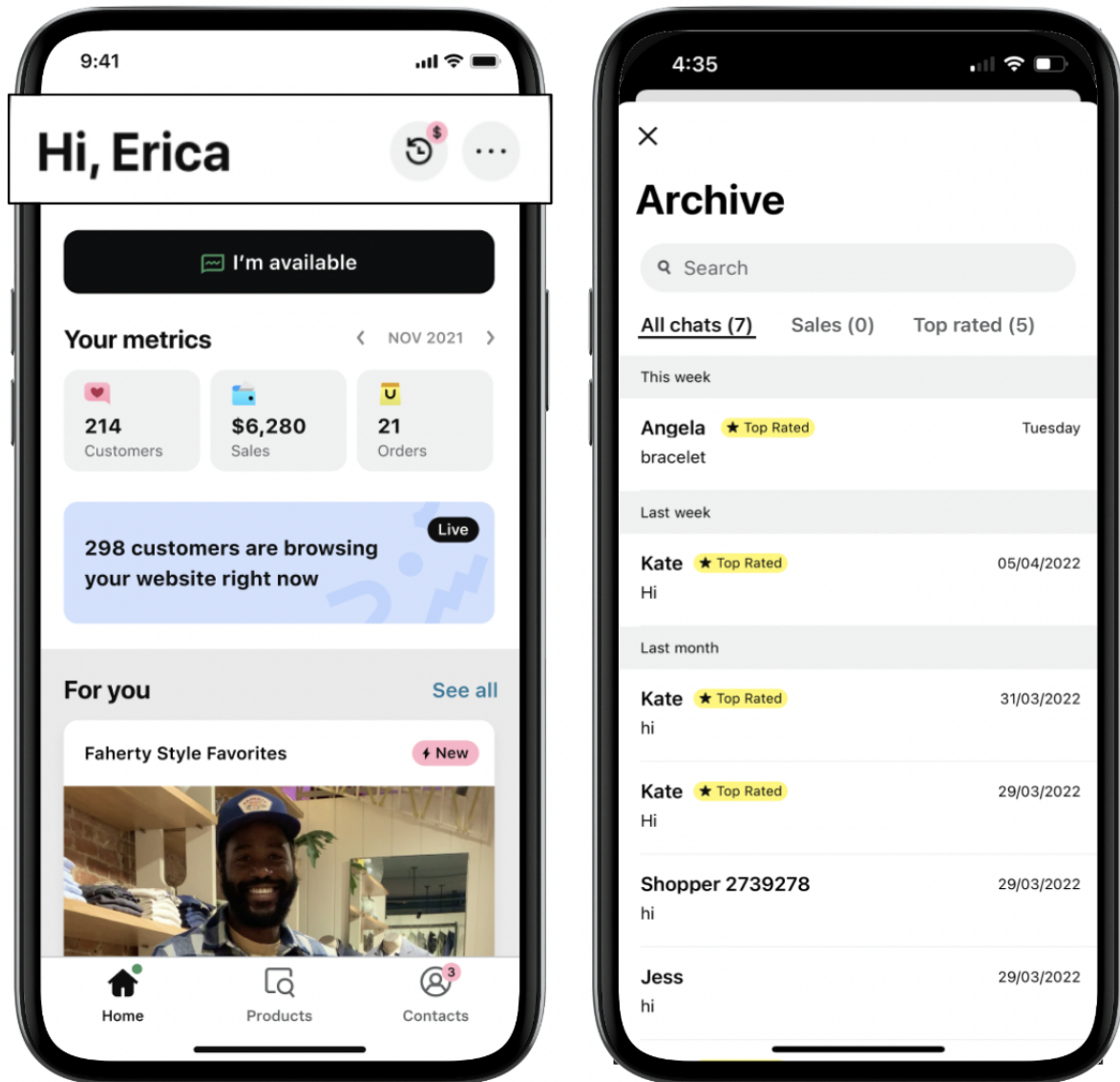
B – Practice Chat. When you first get your account in the Store App set up, you'll have a chance to complete the practice chat to get familiar with the chat interface. If you ever want to try it out again, you can do so from here so that you feel confident.

C – FAQs. If you have a question, you may be able to find an answer quickly here, in addition to tips on Virtual Shopping best practices and details on resolving any technical issues you face.

D – Get Support. Of course, if you can't find the answer you're looking for or otherwise need support, this is where you can come to get in touch with our Customer Support team, e.g. for any issues with your account or the app.

E – Sign Out. Finally, this is where you can securely sign out of your account.

Archive of past chats

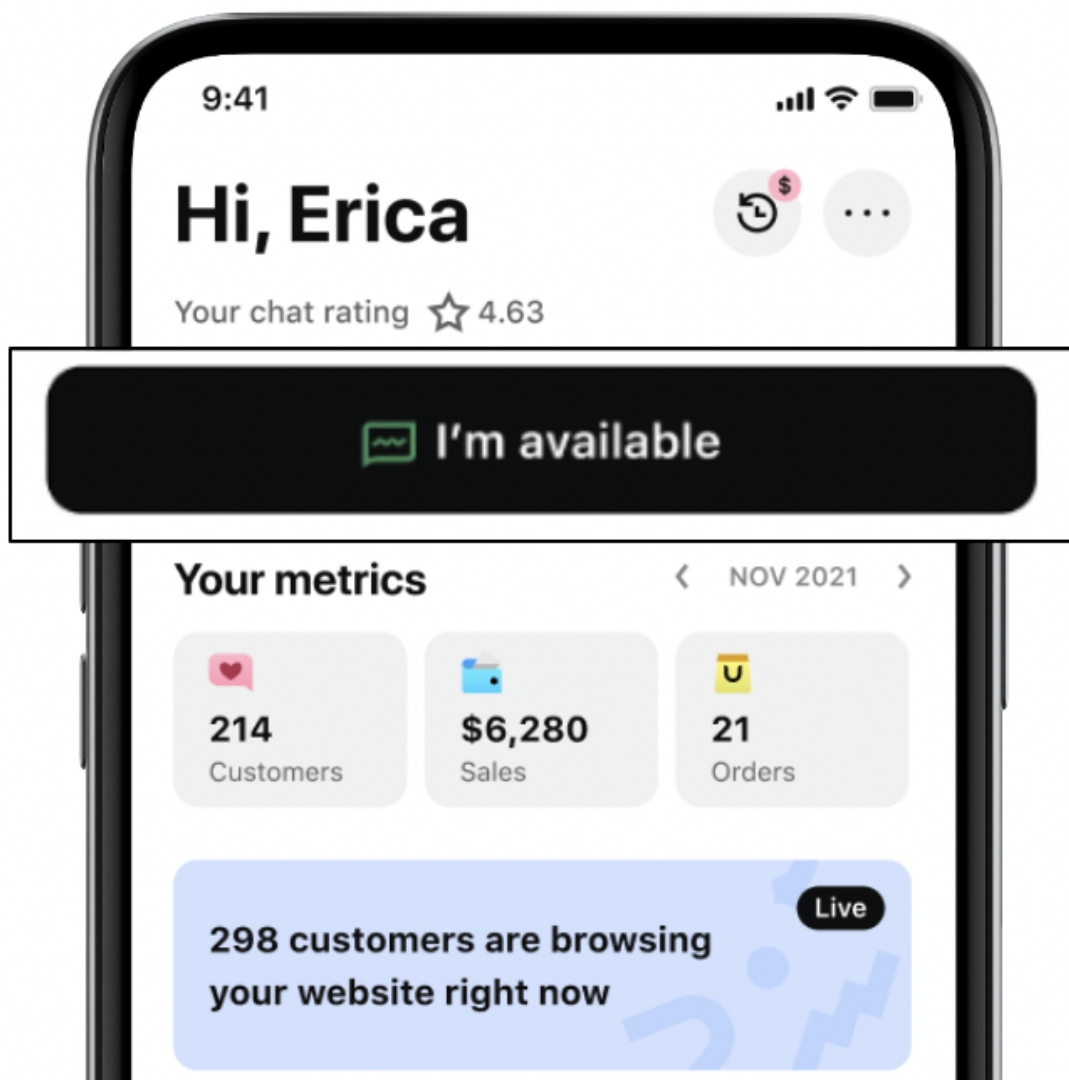


Next to the menu on Store App home, you'll see the archive icon. Here, you can see all of your past completed Virtual Shopping chats.

With the different views, you can see an overview of all your chats, chats that resulted in a sale, and your highest-rated conversations.

How to chat with online shoppers

Setting yourself as available for chats



You're in control of when you receive incoming chat requests from online shoppers.

From the Store App home, you can set yourself as "Available" by tapping the button shown in the image above. It's important to only go available in the Store App when you're able to give Virtual Shopping your full attention. That way, online shoppers will always receive a response and won't be left either waiting or without assistance.

If you're currently not available, simply tap again to go unavailable, and you'll no longer receive incoming chat requests, for example, when things are especially busy on the shop floor.

Claiming chats

10:00



X Decline



Incoming Chat

5 team members are also available
right now



Claim

C

A

B

When you're available, you'll receive notifications whenever a customer begins a chat. In the Store App, you'll see a countdown screen, which gives you a limited amount of time to Claim the chat. This screen will also let you know if you've spoken with this particular shopper previously.

A – When you open the Store App, you'll see the countdown screen. If you don't claim the time before the timer runs out, the request will move on to other colleagues.

B – Tap the "Claim" button to start the chat with the shopper.

C – If you're now busy, choose "Decline" in the top left corner. Remember – if you're not able to accept chats currently, it's best to set yourself as unavailable from the Store App home screen.

Declining chats

10:00



X Decline



Incoming Chat

5 team members are also available
right now



X Decline chat

 Decline and go unavailable

When you decline a chat, you'll have two options:

Decline chat: This will just decline the current chat, which will be sent to other available people in your team. If you decline three requests in a row, you'll automatically be made unavailable.

Decline and go unavailable: This will decline the current chat and make you unavailable, e.g. if you're now busy in-store and can no longer accept chats.

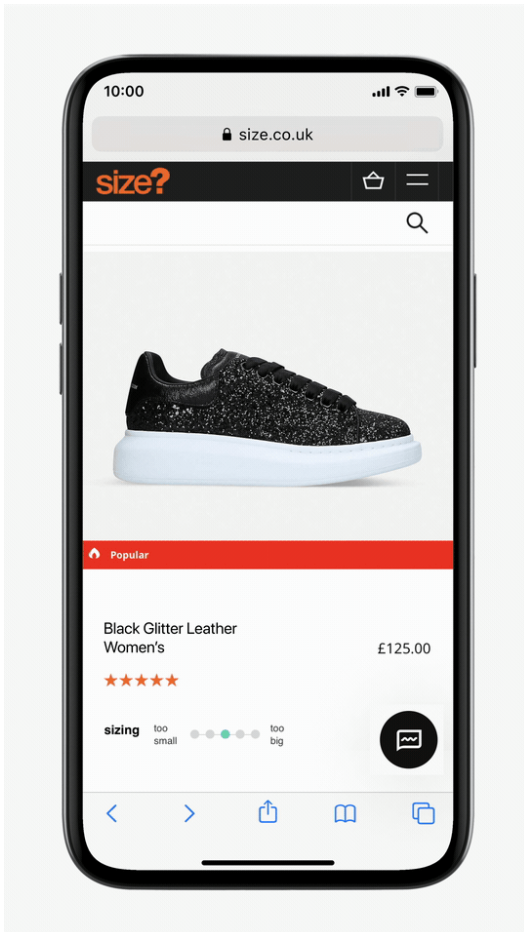
How you're assigned chats

Multiple available people in your team will receive the same incoming chat request at the same time. This increases the chance that it'll be quickly claimed and the shopper won't be kept waiting. So, occasionally, a colleague may accept a chat before you have the chance to claim it.

If no one who sees a chat request claims it in time, it will become a "Missed chat". The shopper will be able to leave a message. Ideally, we want to avoid "missed chats", as it keeps shoppers waiting, which is why it's important to go unavailable if you're no longer able to accept incoming chat requests.

How do your shoppers experience Virtual Shopping?

How do shoppers experience Virtual Shopping?



Whereas product experts and store teams mainly use the Store App, shoppers experience Virtual Shopping directly from the retailer's website.

When Virtual Shopping is set up, shoppers can tap or click the Virtual Shopping chat icon in the lower right corner of the screen from selected pages on the website. This initiates a chat request, which teams accept through the Store App so that online shoppers and experts are connected.

Store Managers | Getting Started

Welcome to Virtual Shopping!

As a Store Manager, your main priorities will be getting your team set up on the Store App and ready to chat. You'll also get access to the Dashboard, where you'll be able to manage your team and track performance.

(1) Why Virtual Shopping?

(2) Onboarding your teams

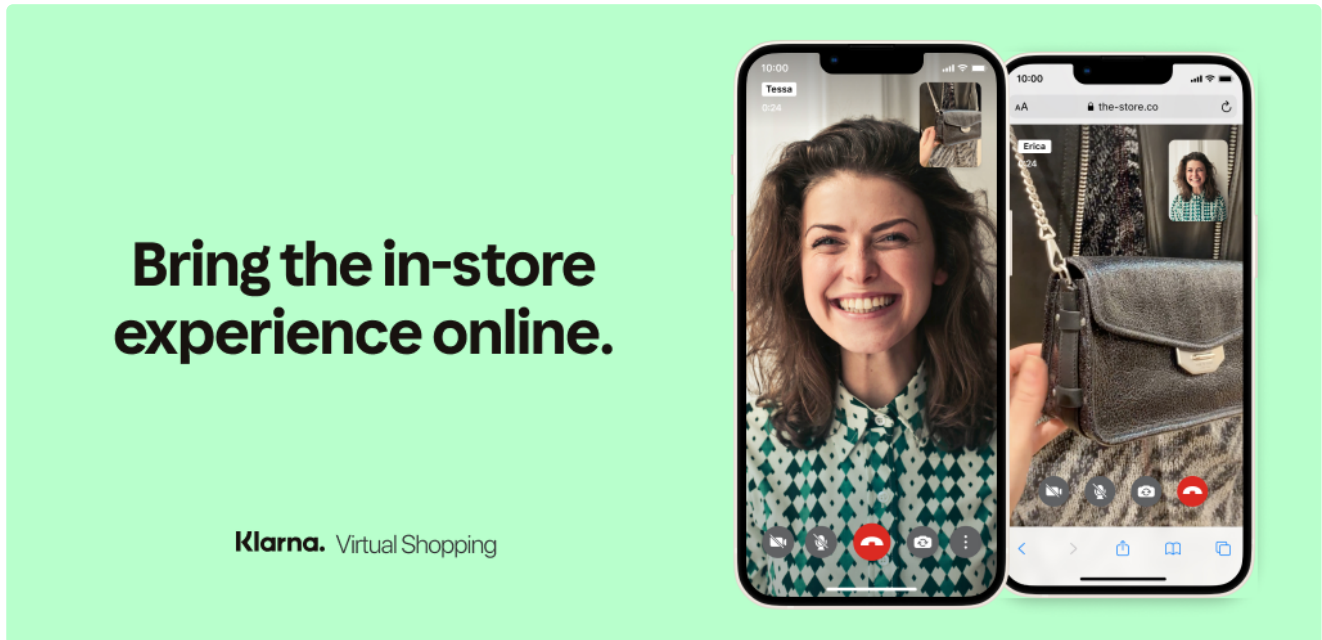
(3) Using the Dashboard

(4) Online sales attribution

We recommend reading through the sections in order to get an overview of using the Store App and the Dashboard.

Why Virtual Shopping?

Achieving your goals with Virtual Shopping



Klarna Virtual Shopping allows your teams to connect with online customers the same way they do with shoppers in-store. They can offer advice, make product recommendations, and generate sales.

*Tip: For retailers using **Virtual Shopping for Shopify**, Virtual Shopping will only appear when your team is available.*

The potential of Virtual Shopping

According to new findings from [Klarna's Shopping Pulse Report](#), shoppers' preferences for online shopping continue to increase despite restrictions lifting in physical stores worldwide. Yet overall consumers still favor shopping in physical stores because of the social interaction and level of customer service they offer.

Unlike shopping in-store, the online experience does not allow consumers to see a product up close, touch, or try on items, making it hard to tell if products are true to size, fit, or color.

According to the Pulse Report, Consumers today are looking for the same level of assistance when shopping online, with over three-quarters (78%) of US shoppers believing that online retailers need to invest in new technology to create more personalized services (45%) and product recommendations (40%).

What do I need to do as a manager to get started with Virtual Shopping?

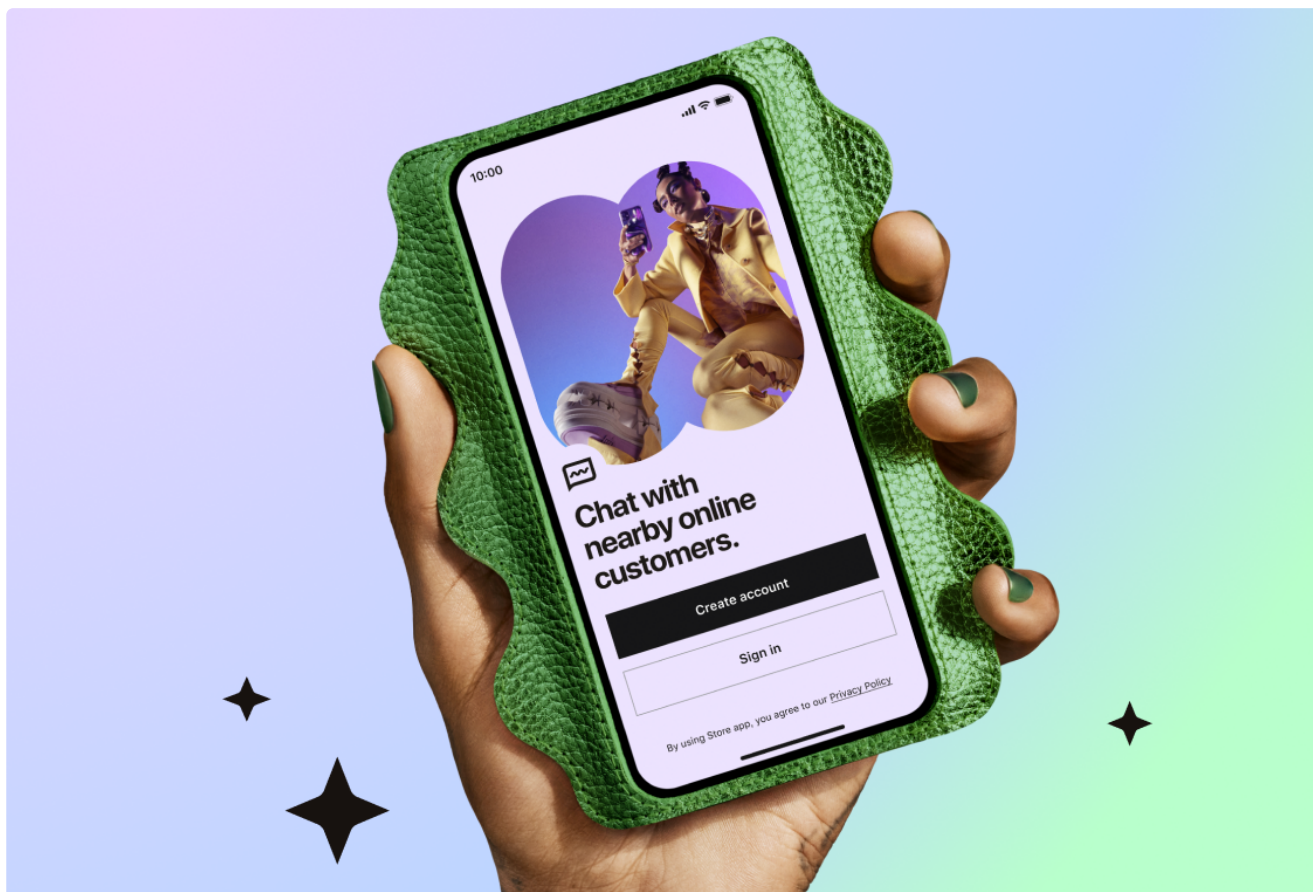
As a Virtual Shopping Manager, your role is to coach your team on this new service and ensure they are providing the best possible customer experience.

In this section, you'll learn about how to coach your teams on Virtual Shopping, monitor performance, deal with different situations, and learn some best practices.

Onboarding your teams

Set up and coach your Virtual Shopping-ready team

Download the Store App



The Store App is available on both Android and iOS devices.

Please use the following links to go to the correct App Store or Play Store page to download the Store App directly. This is so that you and your team download the correct app from the Klarna family of apps.

[Store App for iOS](#)

[Store App for Android](#)

After downloading the app, each member of your team will need to enter your retailer's unique 7-digit invitation code.

You'll find this code by logging onto the Virtual Shopping Dashboard, and going to Settings followed by Accounts overview.

*Tip: Using **Virtual Shopping for Shopify**? Find your retailer code on the main page of your Virtual Shopping dashboard on Shopify.*

Introduction & Practice Chat

Once they've created their individual profiles, your team will be taken through an introduction to Virtual Shopping and a practice chat. Here, they'll get a chance to demo going available, accepting a chat, and using all Virtual Shopping messaging features. You can find out more about these steps in the Using the Store App section.

Tip: Still need to brush up? Your team can always return for another Practice Chat via the side menu on the home screen.

Getting confident

We recommend that you sit with your team when they are having their first chat with a customer to give them confidence and support. This is essential to help your team get comfortable with going available and accepting chats on a regular basis.

Tip: You can make sure your teams go available regularly by ensuring Hero is part of their daily routine. For example, setting Virtual Shopping-related KPIs and including them on your floor plan are great ways to do this.

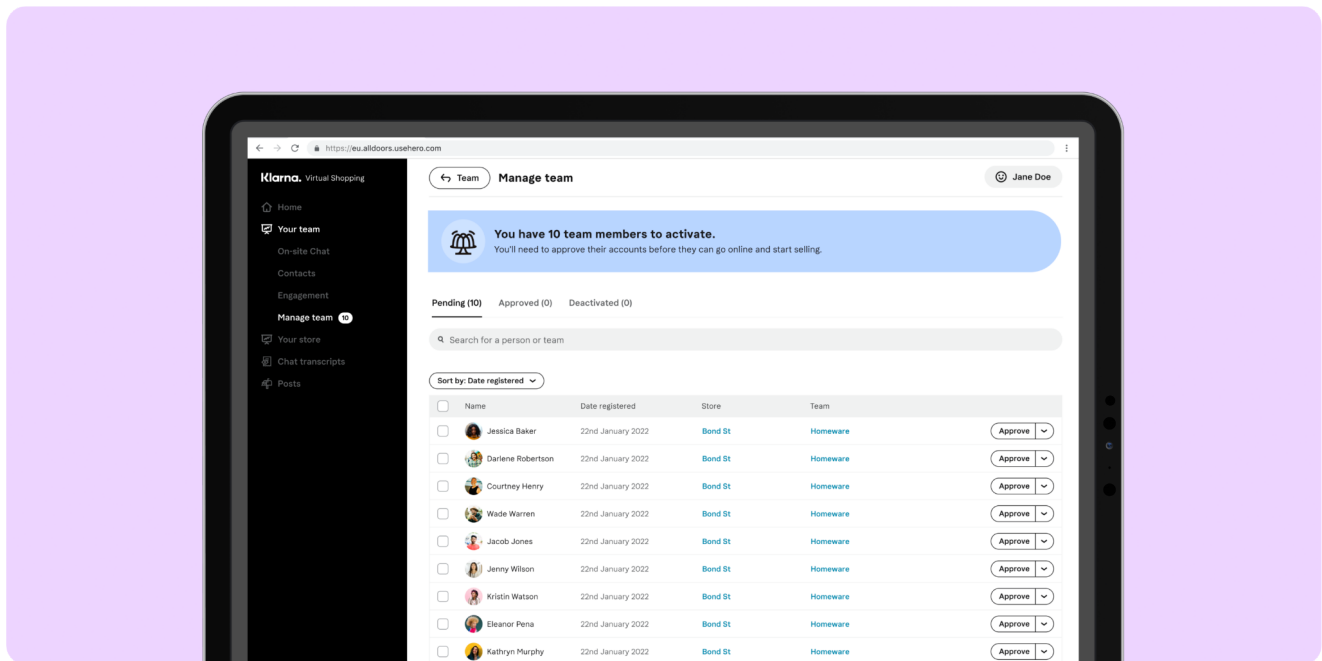
Coaching your team

When your business starts using Virtual Shopping, you'll be given access to the **Dashboard**. Here, you can track team performance metrics, like availability, sales, and star ratings. In addition, you can export the chats of individual team members. By reading through these with your team, you can coach them on how to deliver the best experience on Virtual Shopping.

Using the Dashboard

Getting access

The Dashboard gives you a range of tools and insights to manage Virtual Shopping interactions and their performance.



Track performance and manage your team.

Here, you can access the following sections:

Analytics

Track KPIs, expert usage, performance trends, chat transcripts, and more.

Manage team

Approve pending team members' access to the Store App, deactivate inactive product experts, etc.

Manage Stores

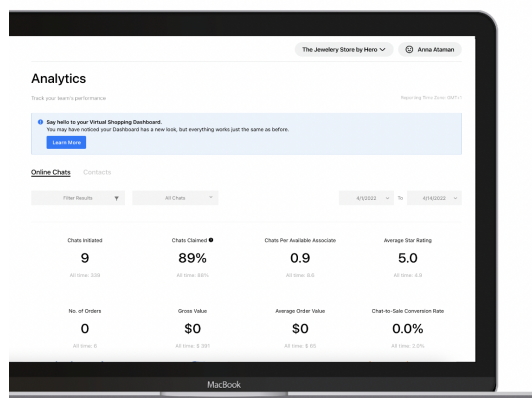
Update, add/change stores and store hours.

Settings

Customize elements of the on-site chat, Store App, and overall account settings in one central location.

*Tip: Using **Virtual Shopping on Shopify**? You'll have access to the Dashboard through the Shopify console. This is where you'll be able to customize the Virtual Shopping experience, track performance, and manage your team, so we recommend checking out Dashboard as soon as you've installed it.*

Tracking performance on Dashboard

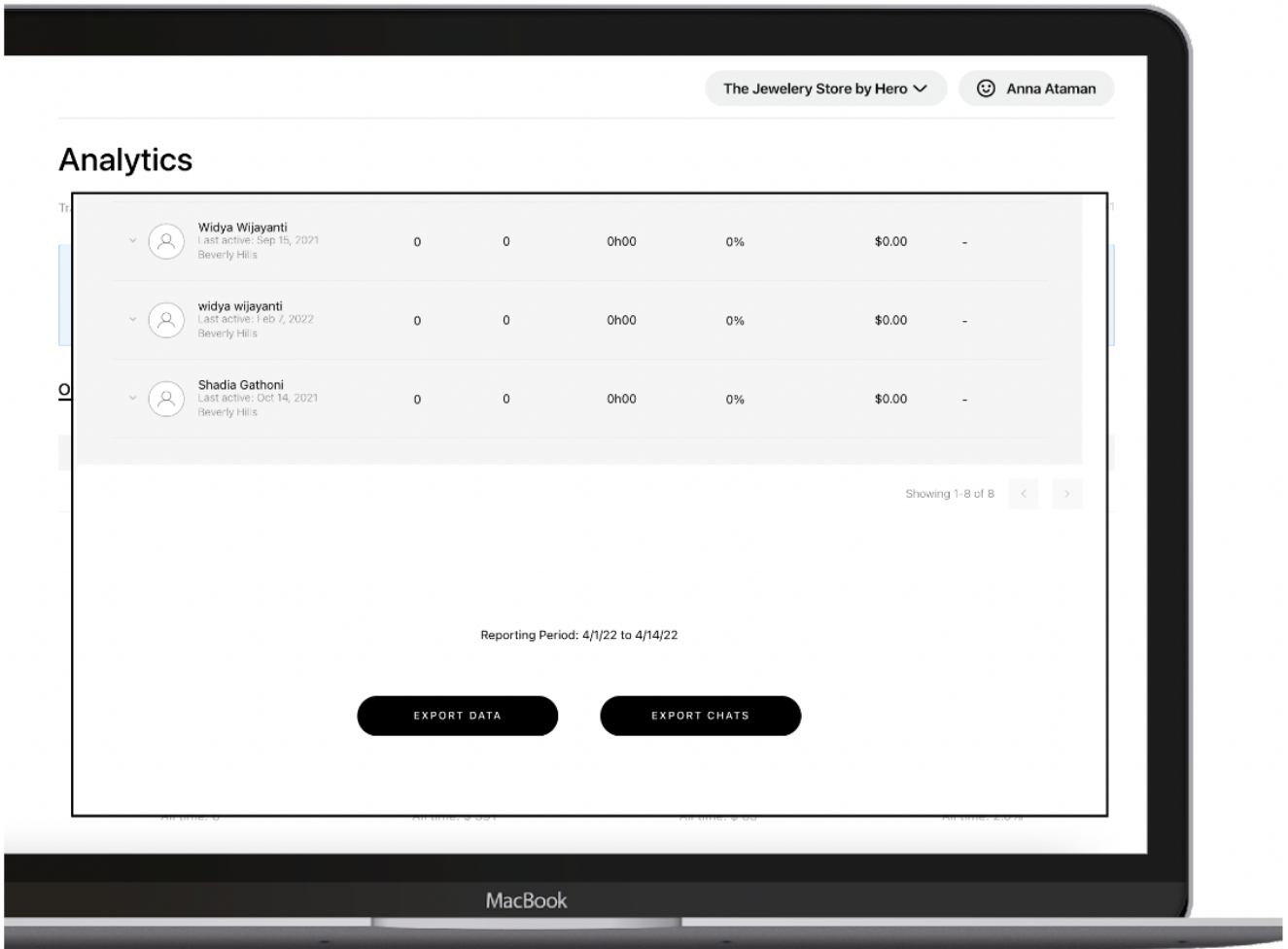


Filter by time period, store, & chat type.

Under the Analytics section, you will be able to track top KPIs, and team performance and have access to data and chat exports in real-time.

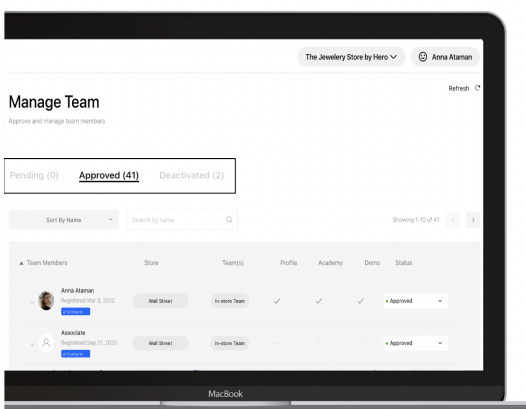
Review performance for specific trends and highlights by filtering to specific store locations, chat types, and time periods.

You'll also be able to export transcripts for your entire team or individual product experts directly in the Dashboard. Transcripts are complete with product links, photos, and videos.



More detailed information about individual performance metrics can be seen when you “Export Data.”

Manage your team



The Manage Team section of the Dashboard is where you can manage who has access to the Store App.

Here, you will be able to approve, deactivate, and reactivate Product Expert profiles as you see fit.

Online sales attribution

Default and premium sales tracking

Once a customer starts a conversation on your website through Virtual Shopping, we track their activity on the website for the next 30 days by default. This means that anything that they purchase is attributed back to the associate they spoke to last. Associates will be notified and can track their performance on the app's home screen.

Tip: Premium and Enterprise retailers may adjust the 30-day window after installation by reaching out to support.

Merchant HQ | Getting Started

Welcome to Virtual Shopping!

Here, we'll outline the steps required to get you operationally ready for Virtual Shopping and ensure a seamless integration. We'll take a look at considerations across your team, and finally what you'll need to consider when it comes to the shopper-facing side of your new Virtual Shopping experience.

(1) Why Virtual Shopping?

(2) Get operationally ready for Virtual Shopping.

(3) Get HQ ready.

(4) Get Store Managers ready.

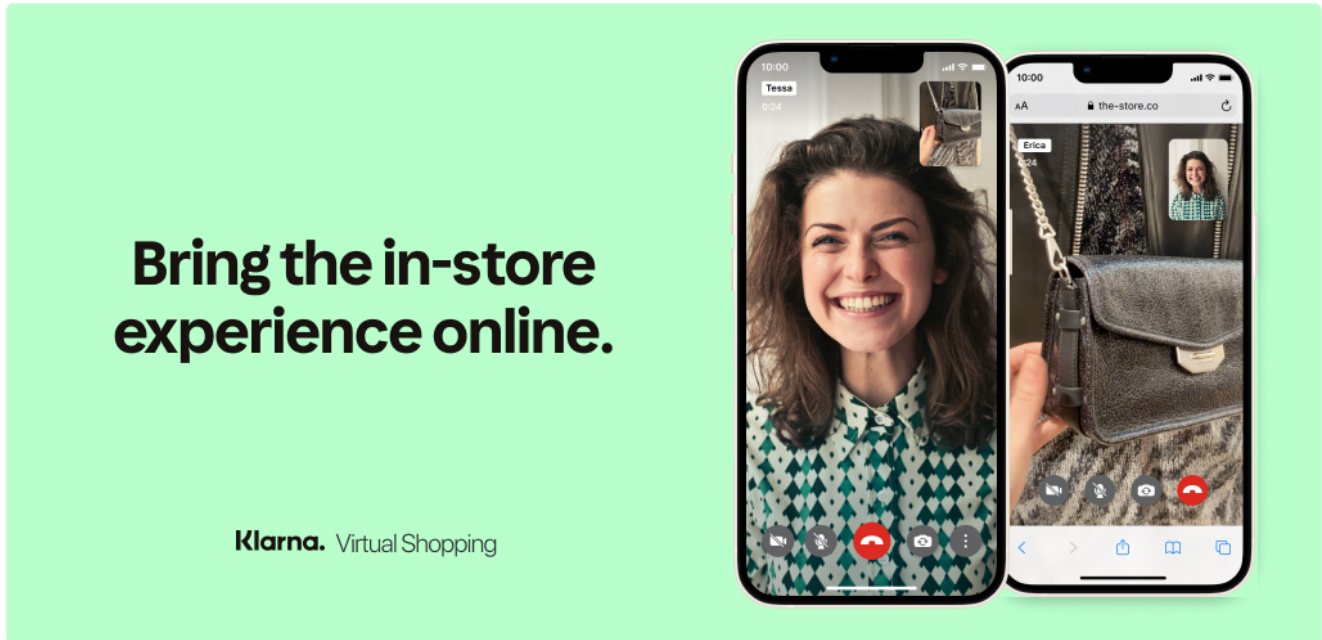
(5) Get Store Teams ready.

(6) Get your website ready.

We recommend reading through the sections in order, discussing questions with your team and formalizing your thoughts and responses to questions into an action plan.

Why Virtual Shopping?

Achieving your goals with Virtual Shopping



Klarna Virtual Shopping allows your teams to connect with online customers the same way they do with shoppers in-store. They can offer advice, make product recommendations, and generate sales.

The potential of Virtual Shopping

While online shopping has risen to new heights in recent years, in-store shopping remains the dominant channel, accounting for nearly [80%](#) of global retail sales in 2021. According to new findings from [Klarna's Shopping Pulse Report](#), consumers favor shopping in physical stores because of the social interaction and level of customer service they offer.

Unlike shopping in-store, the online experience does not allow consumers to see a product up close, touch, or try on items, making it hard to tell if products are true to size, fit, or color. Consumers today are looking for the same level of assistance when shopping online, with over three-quarters (78%) of US shoppers believing that online retailers need to invest in new technology to create more personalized services (45%) and product recommendations (40%).

Ready to take our online shopping experience to the next level?

To help you get set up for success with Virtual Shopping, we've put together steps to make the integration process smooth

Get operationally ready for Virtual Shopping

Define your key goals for Virtual Shopping

Here are some examples of objectives and KPIs that Virtual Shopping can impact:

- Generate leads.
- Drive in-store traffic.
- Increase web traffic and chat volume.
- Enhance your customer experience.
- Reduce returns.
- Increase omnichannel sales.
- Improve customer satisfaction and overall feedback.
- Increase e-commerce conversion.
- Increase average order value (AOV).
- Empower your team of product experts.

Review Virtual Shopping use cases and choose your launch strategy.

When setting out an operational launch strategy with Virtual Shopping, it's essential to take into account your KPIs, business model, and other evolving industry trends. This will influence the type of launch and give you an idea of how best to get your teams ready.

To give you a brief overview of the types of launches we typically offer:

Managed Launch: You'll have a dedicated Klarna launch team working alongside you throughout the whole launch process.

Supported Launch: You'll maintain complete control over the timeline and integration of Virtual Shopping without a dedicated Klarna launch team. This can be completed in as few as 4 days.

Shopify Launch: For smaller Shopify merchants (not available for headless Shopify merchants) with 100k site visits or less per month. A lightweight, self-serve integration without a dedicated launch team.

Throughout the launch process, your dedicated success manager will be on hand to support you and help ensure you reach your full potential with Virtual Shopping!

Next, we'll look at what you'll need to prepare when it comes to different teams in your company.

Get HQ ready.

Set up stores, devices, commission, data sharing, and clienteling.

One of the keys to success with Virtual Shopping is stakeholder alignment. It may be necessary to consider changes such as:

- Having some of your team be dedicated to Virtual Shopping.
- Getting new devices for the team.
- Introducing Virtual Shopping into sales goals.
- Adding commission as an extra motivational boost.
- Considering a new clienteling solution.

Changes can be hard – the first 90 days are key for initial adoption. Consider introducing Virtual Shopping first in stores with a higher level of adaptability, e.g. with a general manager in place, less than x in sales, x% clienteling.

Before going live, you'll need to decide:

- Which stores to go live with.
- Which experts to go live with.
- Which mobile devices experts will need.
- Whether or not to give commission for Virtual Shopping sales.
- Who in your team needs access to Dashboard.
- Which settings to use initially for the Store App.

What do we recommend?

Add saved replies in your brand's voice to empower your experts, including answers to common questions from shoppers.

Think about who should be responsible for managing Store App account approvals, setting opening hours, and chat settings from the Virtual Shopping Dashboard.

Decide whether your team will access the Store App on personal or company devices, in-store or remotely.

Roster your teams based on peak hours.

Include sales made as a result of Virtual Shopping interactions in existing sales goals to motivate your team and encourage adoption.

Be transparent and communicate how Virtual Shopping fits your specific brand.

Set up internal planning and alignment sessions to review Virtual Shopping metrics, and identify what's working well and where improvement is needed. This will be especially important in the early stages to get the most ROI.

Get Store Managers ready.

Scheduling, performance management, motivating staff.

While product experts will need some training to familiarize themselves with the Store App to connect with shoppers directly, managers need to take care of scheduling, monitoring their teams' performance, and keeping their teams motivated.

Before going live, managers will need to:

- Decide on scheduling and consider rostering experts based on the busiest times.
- Undertake training to become familiar with Dashboard.
- Monitor performance for their team, including shopper ratings and feedback.
- Plan how to manage and balance in-store sales with Virtual Shopping sales.

What do we recommend?

Encourage managers to think about incorporating Virtual Shopping into their teams' daily huddles and routines, including their break schedule.

Ask managers to also consider how Virtual Shopping fits into their physical space, for example, if there's a specific area where experts should message online shoppers.

Ask managers to train experts on Virtual Shopping best practices, including keeping availability up-to-date in the Store App to avoid missing any chats.

Implement a specific POS code ahead of time to track any sales from Virtual Shopping that may be completed in-store.

Get Store Teams ready.

Setting up a Store App profile, training, and best practice.

Creating a shopper-facing profile

After downloading the Store App, product experts will need to enter a 7-digit code unique to your retailer. You can find this to share with your team by logging onto the Virtual Shopping Dashboard and going to Settings, followed by Accounts overview.

They'll then need to enter their profile details, including a display picture so that shoppers can see whom they are chatting with. Following this, they'll be guided through training in-app while they wait for their account to be approved so that they can start claiming chats.

Training

Experts are given the option between [live training](#), quick in-app guides, or detailed "how to" guides depending on their preference and learning style to become Store App professionals in no time! Getting started with Virtual Shopping also serves as the perfect time to refresh the team on your brand standards throughout the sales journey.

Best Practice

During chats with shoppers, experts can use saved replies, which you can add and edit in the Dashboard. They should also consider any personalized saved replies they may wish to use in their own chats, for example, a personalized intro about how they can help.

Additionally, they should be familiar with chatting with the appropriate tone of voice, which questions to ask, and the full range of features at their disposal in the Store App.

Day-to-day Virtual Shopping

Experts should never jeopardize the in-store experience. That's why we emphasize that they should only go available when they are actually able to give their full attention to the Store App in a way that is not distracting to in-store shoppers.

Work devices, a dedicated Virtual Shopping seating area or section of the shop floor may help with this.

Get your website ready.

Virtual Shopping display, customer service, and marketing.

Last (and definitely not least), you'll need to consider how Virtual Shopping should look on your shopper-facing website. Consider the following questions:

Where do you want the chat to display?

Are there limitations of where the onsite chat should never be visible to the shopper? Do you have an existing customer service tool on your site?

When do you want the chat to display?

Should Virtual Shopping be displayed even if an expert isn't available in real-time?

How do you want the chat to look?

What color should the On-site Chat button be? How do you want to refer to your experts in shopper-facing contexts?

Are you able to dedicate resources to Virtual Shopping marketing collateral?

If so, where? Through email, or your social channels, for example?