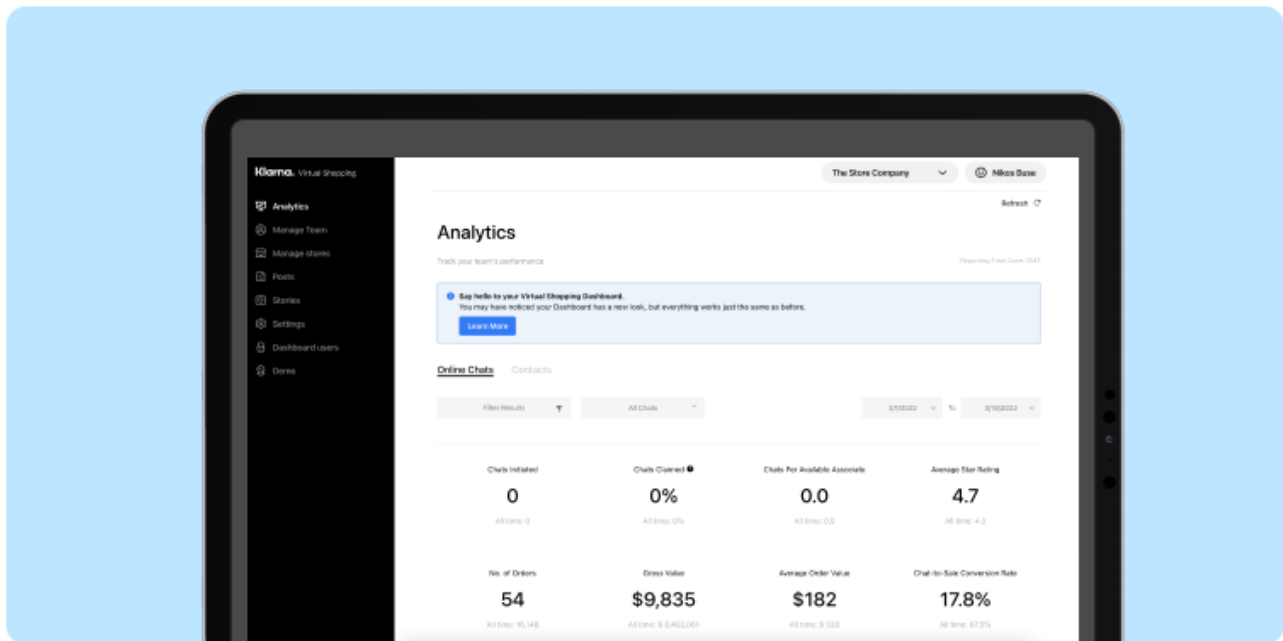# Settings Guide

Configure the Virtual Shopping experience in Dashboard

Welcome to your guide to changing settings in the Dashboard ⚙️

The Dashboard gives you powerful control over your Virtual Shopping experience. To help you perfect your setup, we've put together this simple guide that explains each adjustment you can make and top tips on how to get the best out of every setting.

There are three types of settings, which change different aspects of the experience:
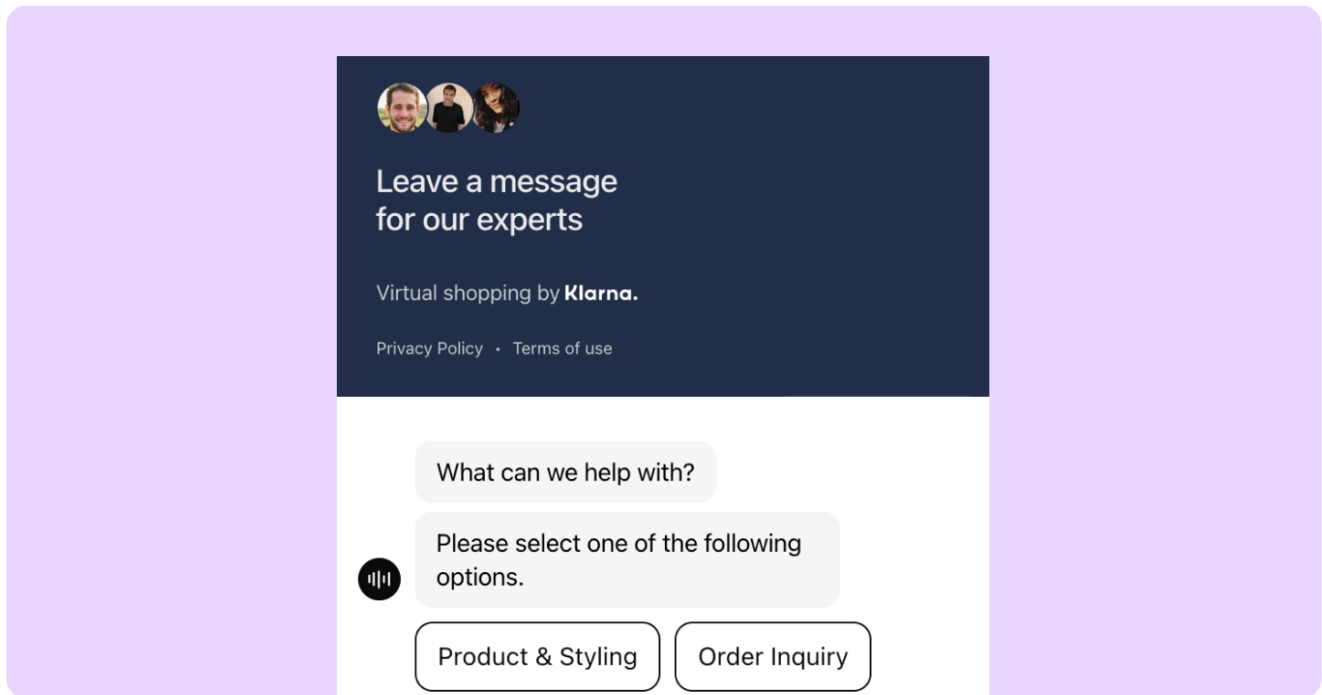
📄 On-site chat

📄 Store App

📄 Account

On-site chat

On-site Chat overview

Configuring On-site Chat 💬

From **Chat Settings**, you can change how shoppers experience the Virtual Shopping On-site Chat feature.

Check out each section for more details on the different aspects of On-site Chat that you can customize:

📄 Supported languages

📄 Custom theme

📄 Photo and video sending

📄 Privacy policy URL

📄	Terms and conditions URL

📄	Customize text

You can go beyond how On-site Chat looks to shoppers and change the rules for when it is displayed, for example, if it's outside of your opening hours, or no one in your team is available on the Store App. Learn more about how to edit display settings here:

Broken link

Supported languages

Setting the right language 🌎

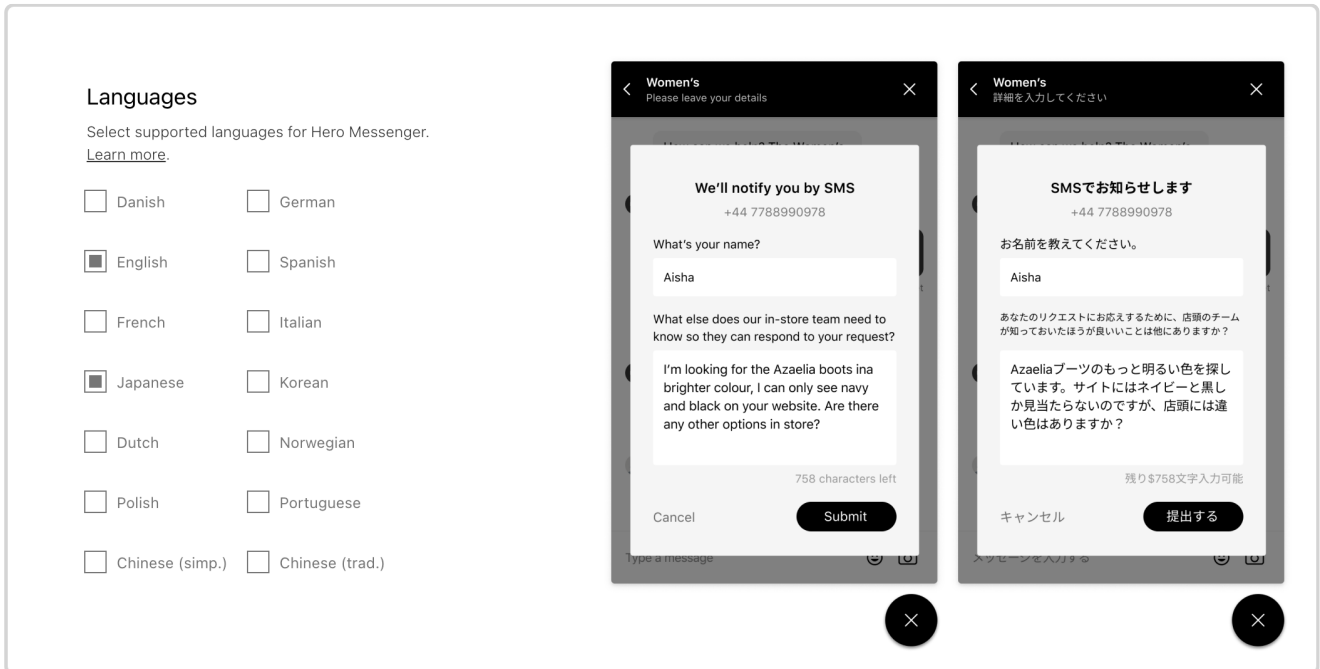An example of On-site Chat in English and Japanese.

Language configuration lets you set the language that On-site Chat displays.

When a shopper lands on a webpage, they will see On-site Chat in the language in the preference hierarchy that the shopper has set for their web browser.

You can select any of our available languages to be available. Where a shopper's browser is in a language that you haven't selected or that otherwise isn't supported, they'll see Virtual Shopping in the default language, English.

> ✅ For a consistent experience, we recommend adding supported languages to match the languages your store team members are likely to use in a chat.
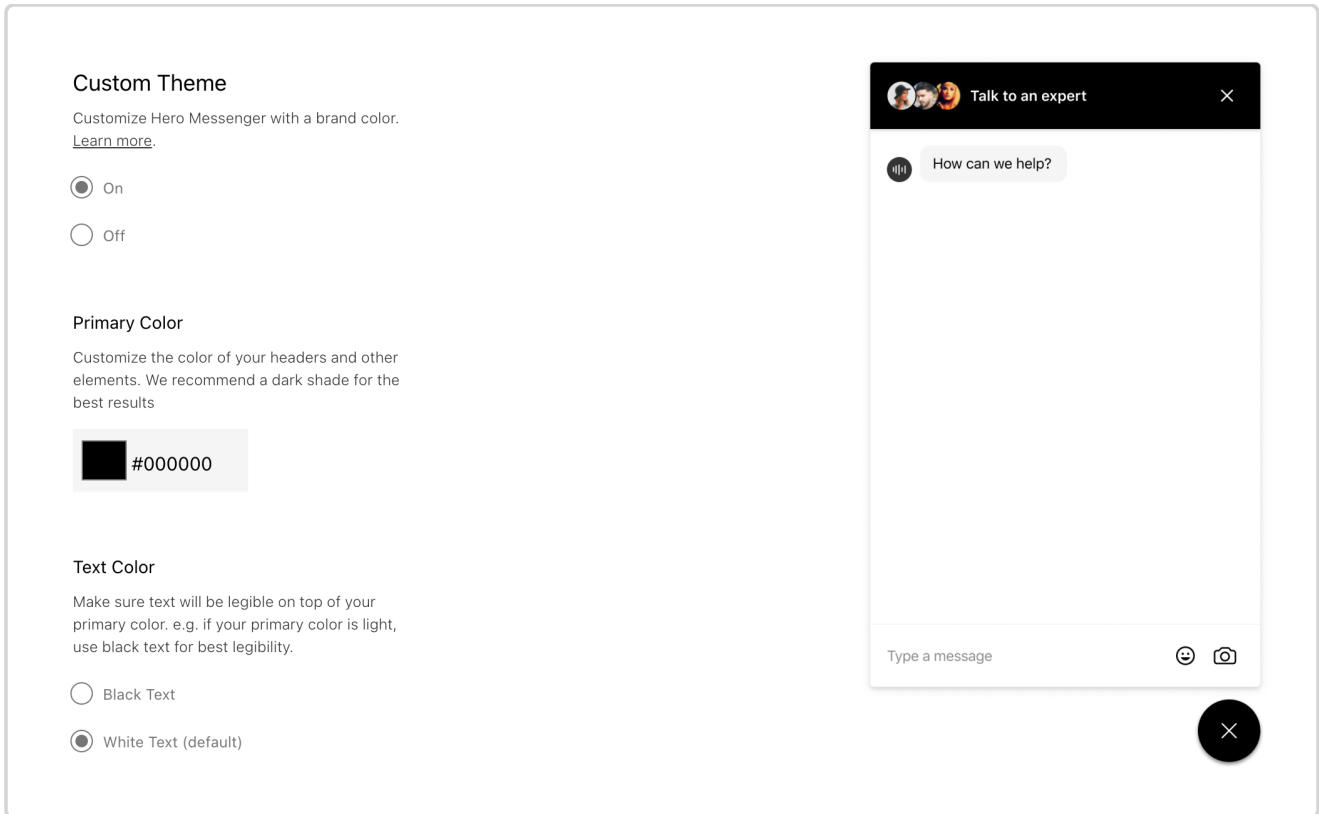
Which languages are supported?

Currently, On-site Chat and the Store App are available in the following languages:

English, Danish, German, Spanish, Finnish, French, Italian, Japanese, Korean, Dutch, Norwegian, Polish, Portuguese, Swedish, Chinese (Traditional), and Chinese (Simplified).

Custom theme

Setting the colors of On-site Chat 🌈

Under **Custom Theme**, you can customize the primary color and text color of On-site Chat. By switching Custom Theme on, you will be prompted to choose a primary color for the chat plugin. Note: the secondary color is always white.

To set your preferred color:

1. Enter a hexadecimal code value in the text input field.
2. Click on the square next to the input color to bring up your browser's color picker tool. You can then set the color via RGB, HSL, the eyedropper tool, or a sliding scale.

If you have set a primary color, you'll also be prompted to choose black or white for your header text. This is the text in the bar at the top of On-site Chat. Make sure to choose whichever option has more contrast with your chosen background color to keep it legible.

> ✅ In most cases, we recommend using the default colors for On-site Chat (black and white) as it tends to provide a consistent look and feel

Photo and video sending

Letting shoppers send photos and videos 📹
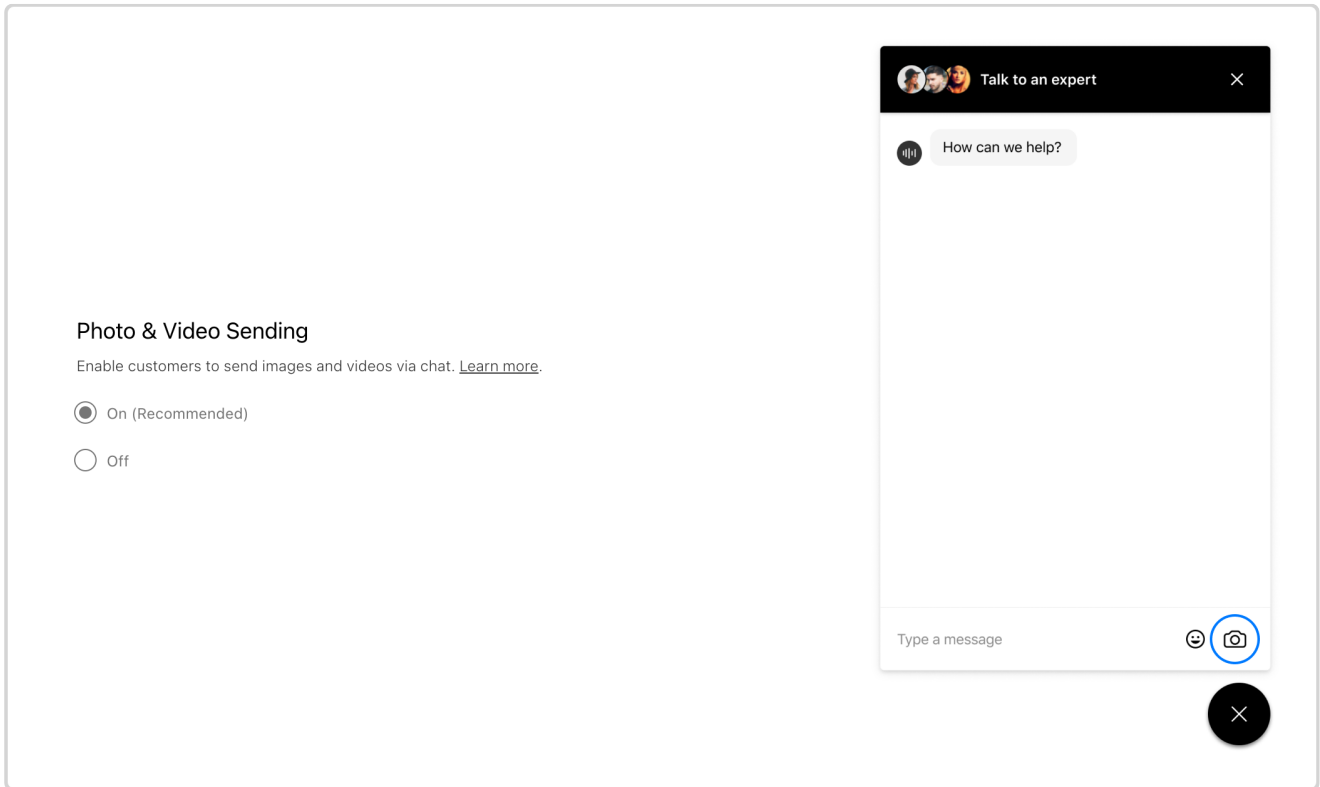
The **Photo & Video Sending** setting lets you determine whether shoppers can send media files such as pictures and videos to store teams during a chat.

> ⓘ When this option is switched on, you'll need to also make sure photo sharing is switched on for the Store App on your team's devices.

During a chat, shoppers will often ask for context-specific advice. To share that context, shoppers may choose to send teams pictures or videos of other items in their wardrobe, a piece of furniture in their home, and much more.

By switching this setting on, you can give shoppers the ability to send store teams photos or brief videos over the On-site Chat. If this setting is switched off, shoppers will not have this option.

Regardless of whether this is on or off, experts will always be able to send videos and photos from the Store App to the shopper. This setting only applies to shoppers sending media to experts.

In most cases, we recommend switching on photo and video sending, but this will not always be the best choice for you. To learn more about this setting, please contact your Customer Success Manager.

Privacy policy URL

Linking shoppers to your privacy policy
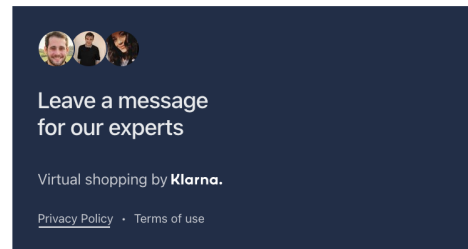
Here, you can set the URL to which shoppers will be directed if they click on the privacy policy link in the On-site Chat plugin. This is displayed to shoppers at the beginning of a chat.
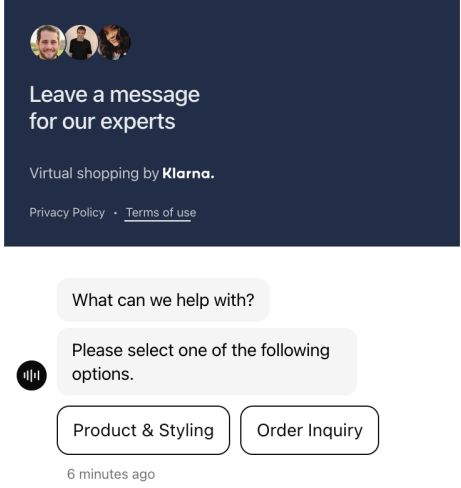
Simply copy and paste the URL for your Privacy Policy into the text field.

Terms and conditions URL

Linking shoppers to T&Cs 📜
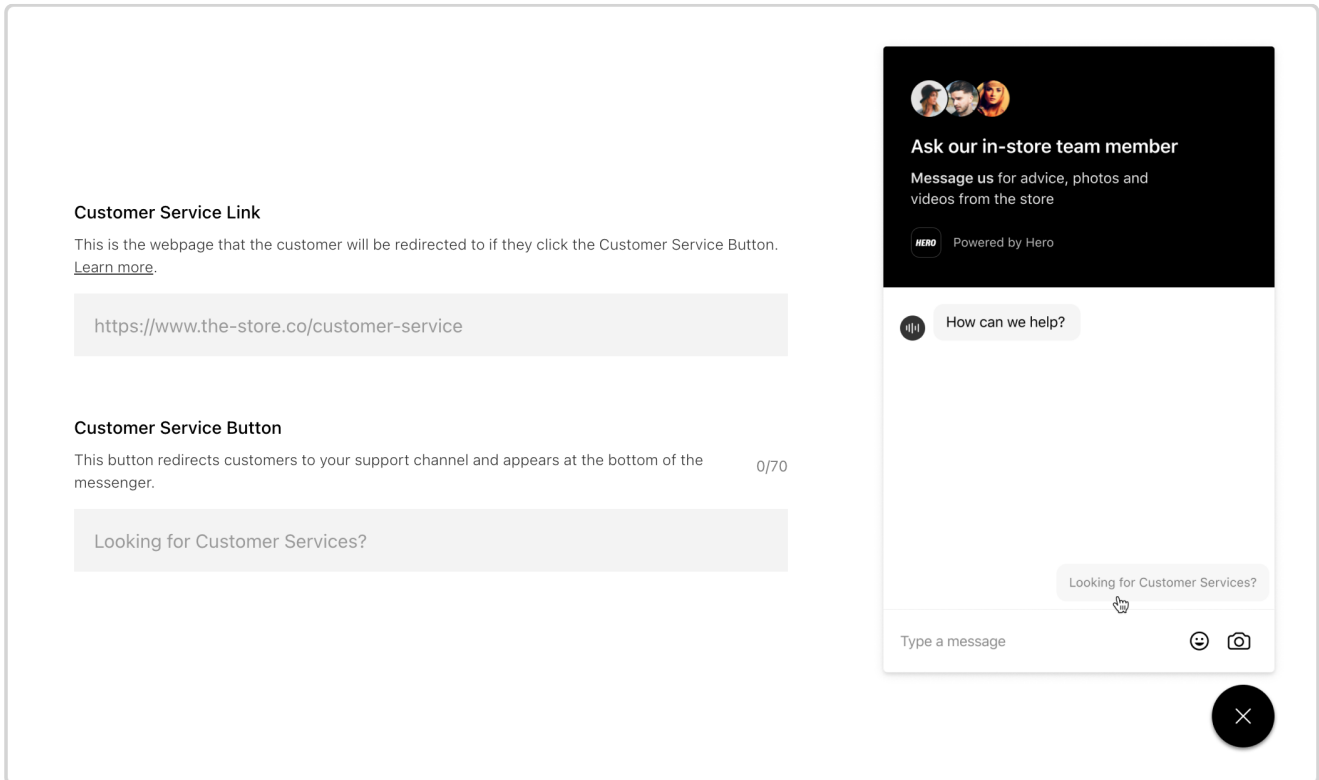
Here, you can set to which URL shoppers will be directed if they click the Terms & Conditions link in the On-site Chat plugin. This is displayed to shoppers at the beginning of a chat.

Simply copy and paste the URL for your Privacy Policy into the text field.

> ⓘ In many cases, we recommend using the Terms & Conditions configuration but this setting is optional. To learn more about this setting please contact your Customer Success Manager.

Customer service URL

Redirecting shoppers to Customer Service 💁

In the **Customize Text** tab of **On-site Chat Settings**, you can set up a redirect link to your customer service, so that your store teams can focus on sales and shoppers can get help from the right person if they have a customer service query.

If you've chosen to customize the On-site Chat text, you'll be prompted to add a link to your customer service at the base of this page.

The customer service link consists of two text input fields, both of which you will need to fill in to set up a customer service redirect.

1. The URL where you would like customer service queries to be redirected.
2. The text that you would like to use to indicate to shoppers that this is where they go for customer service-based queries.

Shoppers who click on the link in On-site Chat will be automatically redirected in their browser so that they can speak to your support teams through your customer service solution.

We highly recommend you link to your customer services page and use on-brand copy. This will help ensure that your shoppers' queries are answered quickly and correctly by support while your product experts can focus on sales-related chats.

Customize text

Customizing shopper-facing text in On-site Chat 🔤

In the **Customize Text** tab under the **On-Site Chat Settings**, you can customize the strings that appear in On-site Chat, including terms to describe your store teams, first messages, and links to customer service.

Here you can select whether to use all default text or add custom text to provide a more branded Virtual Shopping experience.

Default text

Once you have completed the retailer creation flow, On-site Chat will automatically begin using default text. This is the standard and recommended Virtual Shopping copy.

Custom text

If you choose to customize the text, you will need to update the custom text for each language you have set the plugin to use. Settings will pull in the languages you enabled in Supported Languages. If no additional languages have been added, the default language will be English.

> ⚠️ Custom text may not appear straight away in the On-site Chat plugin unless you clear your browser's cache.

Here is a full list of text that you can customize, along with character limits for each string:

Term	Custom Text	Example	Character Limit
Header - title (expanded)	`header.title`	Ask our in-store team	50
Header - body bold	`header.introduction.askStrong`	Message us	50
Header - body normal	`header.introduction.askNormal`	For advice, photos and videos from the store	150
Welcome message (available)	`message.initial.starter.available.multiple` and `message.initial.starter.available.single`	How can we help?	40
Welcome message (busy)	`message.initial.starter.busy.multiple` and `message.initial.starter.busy.single`	How can we help? Our team is busy in-store right now, but they'll get back to you if you leave a message	170
Welcome message (closed)	`message.initial.starter.closed.multiple` and `message.initial.starter.closed.single`	How can we help? The store is closed right now, but they'll get back to you if you leave a message	170
Customer Services link	`linkText.customerService`	Looking for customer services?	70
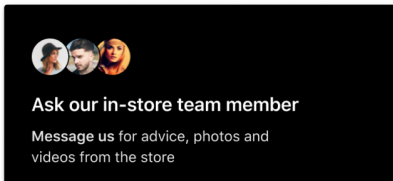
Once complete, you will need to save any new changes.

Any fields left blank will revert to the default copy.

> ⚠ It is not possible to add line breaks in your customized text, as this can break the layout of the On-site Chat.
>
> It is also not possible to customize or change the font, size, color, weight, and style.

Manage where On-site Chat displays

What is "Manage Display"?

Manage Display is a feature within Dashboard that allows you and your team to easily configure where and when Virtual Shopping On-site Chat appears on your website. You can also see at-a-glance where Virtual Shopping is currently appearing in your website.
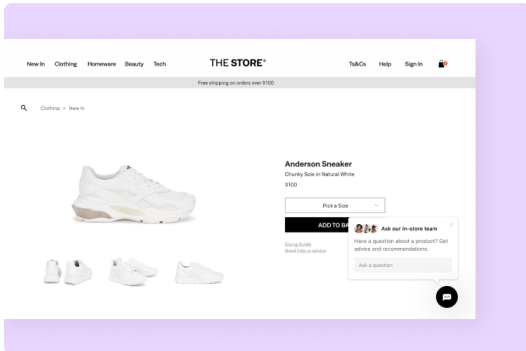
Within the Manage Display feature, you and your team have the option to use our "simple mode", for team members of any technical ability to configure how Virtual Shopping appears, or "advanced mode", for technical teams that want to apply more complex rules for how Virtual Shopping displays.

> ⚠️ Advanced mode and simple mode for your display settings cannot be used together. Using simple mode will override your advanced mode settings, and vice versa.

Getting started configuring your display settings

During your launch you will be provided with a Google Sheet for you to add your preferred rules.

> ⓘ When first implementing On-site Chat, the Javascript code snippet must be added to every page of your website including the checkout confirmation page, apart from sensitive checkout pages which are optional. This is important so that chats can follow shoppers from page to page and sales are tracked correctly.

While Virtual Shopping can apply rules to 90,000 URLs via Advanced Mode, we do not recommend supplying long lists of URLs because this can impact how quickly the chat loads.

Please note without either any display rules in place, the On-site Chat icon will display everywhere on the website where the tag is deployed.

When will I need to use this feature?

You will need to use this feature any time you want to adjust on which pages the On-site Chat displays. This could be during the launch of a new product, when running tests on your home page, and more.

Learn more about Manage Display

Check out the following pages for in-depth details on how to use each of the different modes to manage where On-site Chat displays on your site:

	Using Simple Mode

	Using Advanced Mode

Store App

Store App overview

Configuring the Store App 📱
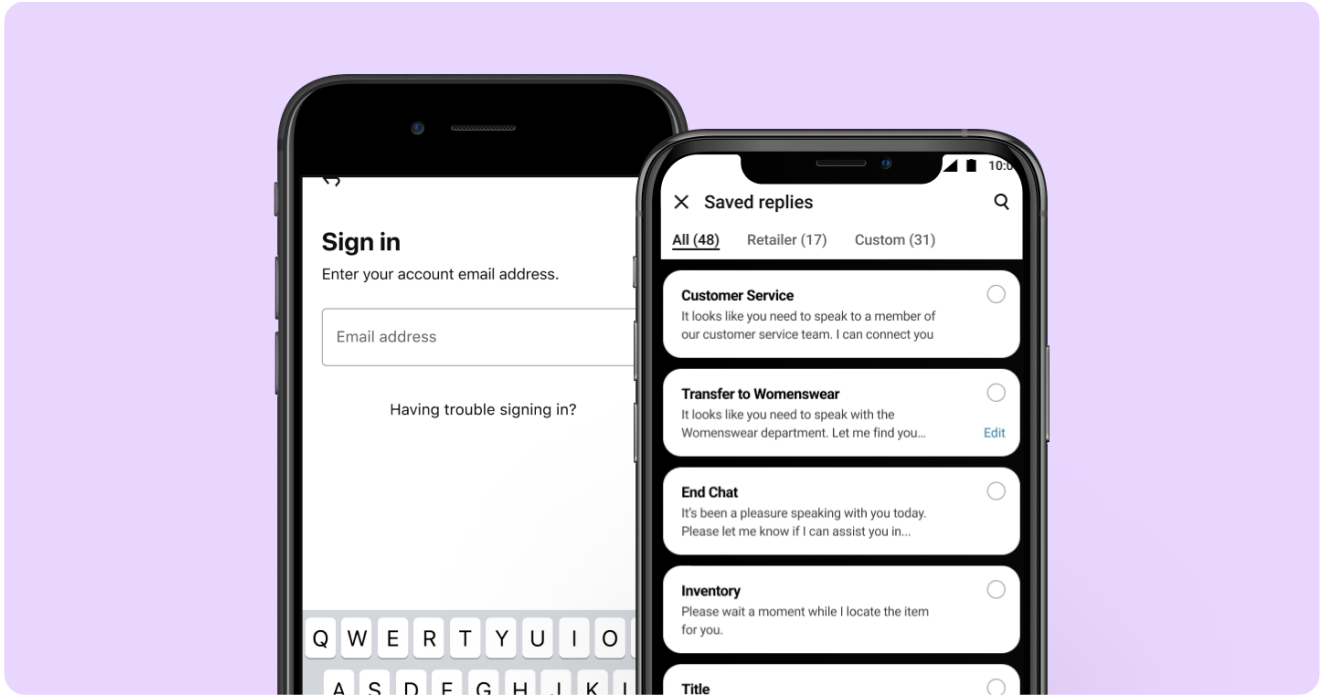
Under **Mobile Settings**, you can change how store teams experience the Store App. Jump in to learn about each setting:

📄 Employee ID

📄 Saved Replies

📄 Simultaneous Chat

Employee ID

Setting Employee IDs input during sign up 🏷️
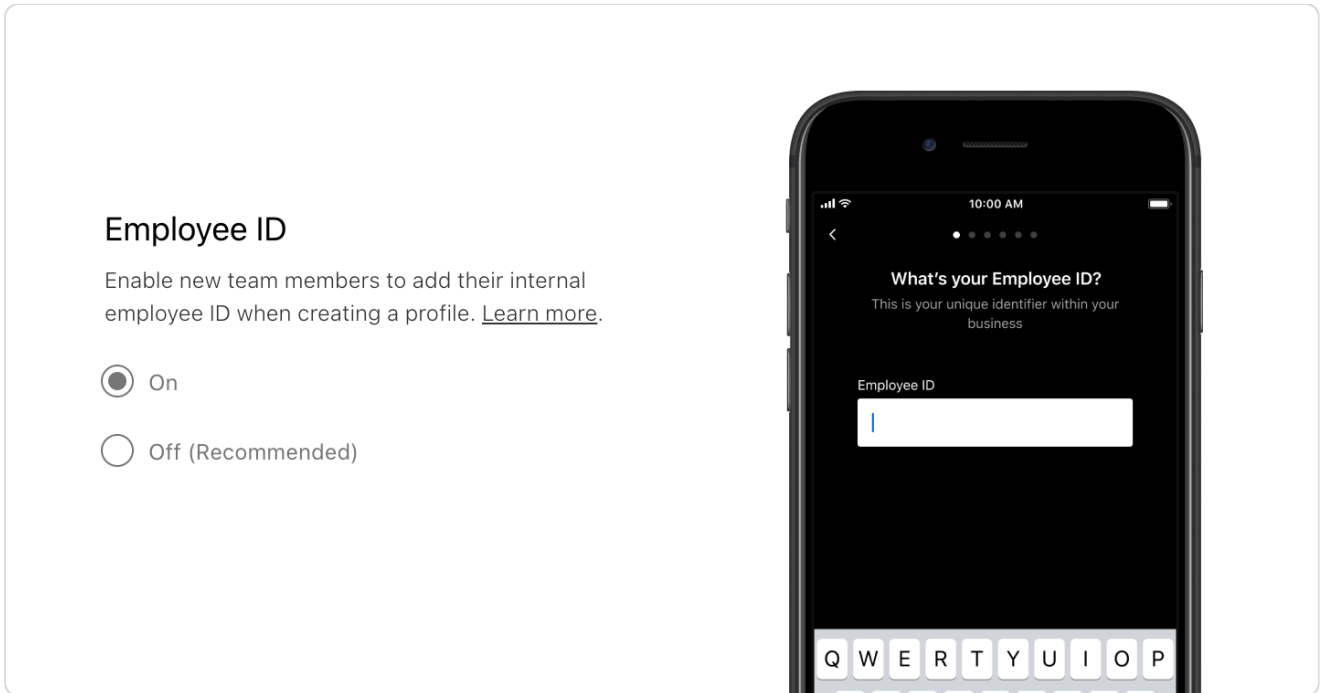
Here, you can choose whether you want your team members to input their Employee ID number when registering on the Store App.

They'll be prompted to input their ID as part of the onboarding flow, and their account and performance will be tracked against this ID for the duration of time that they use the Store App.

> ✓ In most cases, we recommend switching off the Employee ID configuration, unless needed in a specific circumstance.
>
> To learn more about this setting please contact your Customer Success Manager.

Saved Replies

How to add new Saved Replies 💾
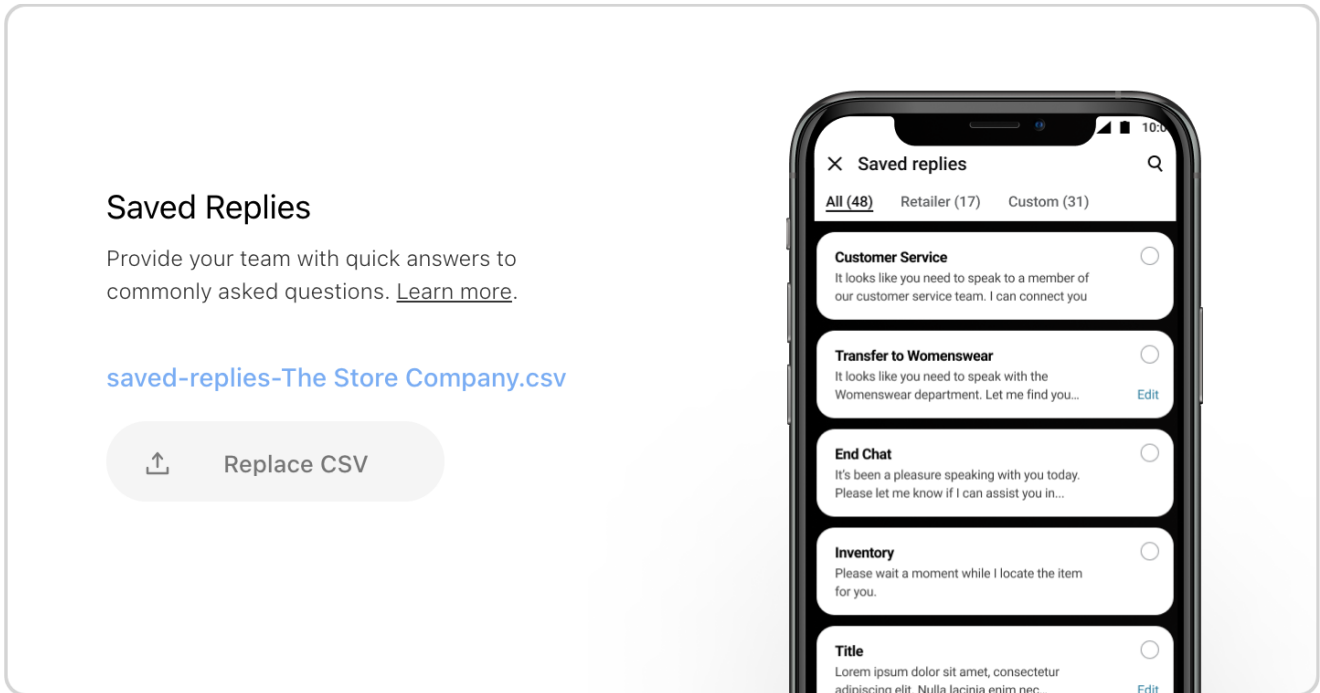
Add Saved Replies for your store teams to use in the Store App. These are pre-written replies that can address frequently asked questions from shoppers in a complete and on-brand way.

Changing any Saved Replies will apply across all departments, and overwrites any current saved replies.

To add a new Saved Reply:

1. Open the Saved Replies file you intend to upload in Excel.
2. Confirm the file does not have any extra headers, all headers are correctly formatted, no extra lines are included and that no titles are duplicated.
3. Save the file as a CSV
4. To double-check check the file is correct, you can open it in TextEdit to make sure there are no empty lines. If there are, simply delete them, and save.
5. Go to the **Mobile Configurations** for your chosen retailer.
6. Click **Upload CSV** and select your file.
7. Save Changes

> (i) Saved Replies must be uploaded in the correct format:
>
> - CSV file
>
> - Headers in line 1: ONLY Title, Body
>
> - No empty lines
>
> - No extra columns
>
> - No duplicated titles
>
> If you're editing the document in Notepad or TextEdit, make sure that any entries with commas are wrapped in quotation marks, e.g.: Greeting, "Hello, how can I assist you today?"

```
Title,Body
Greeting,"Hello, how can I assist you today?"
```

Example good file:

📎	Saved Replies - Template.csv 1KB
	Text

Good Saved Reply Template

Common errors in files:

```
Title,Body
Greeting,"Hello, how can I assist you today?"
Greeting2,"Hello, how can I assist you today?"
,,
,,
,,
,,
,,
,,
,,
```

Empty Lines

	A	B	C	D	E
1	Tajtl	Bodi			
2	Greeting	Hello There!			
3	Introduction	My name is Ivan.			
4	Goodbye	Farewell.			
5					
6					
7					
8					
9					

Misspelled Headers

	A	B	C	D
1	Title			
2	Greeting			
3	Introduction			
4	Goodbye			
5				

Missing Header - 'Body'

	A	B	C	D	E
1	Title	Body	Lorem		
2	Greeting	Hello There!	Ipsum		
3	Introduction	My name is	Dolor		
4	Goodbye	Farewell.	Blah		
5					
6					
7					
8					

Extra Header

	A	B	C	D	E
1	saved-replies-Adidas staging				
2	Title	Body			
3	Greeting1	Hello, how can I assist you today?			
4					
5					
6					

Headers not in Line 1

Empty template with an extra header

Duplicate Titles

Wrap the body in quotes if it contains a comma

> ⓘ When copying text from another program such as PowerPoint, odd characters can come through. It's important to check the replies in the preview before saving.

Personalized Saved Replies

Product experts using the Store App are also able to add their own personal Saved Replies, for example, a response to a question in their own voice. They can do this directly in the Store App, and these Saved Replies are only accessible by them, i.e. they're not added to the team's base of all Saved Replies.

Simultaneous Chat

It's possible for store teams to be in more than one active chat at a time. Learn more about Simultaneous Chat:

How Simultaneous Chat works

Frequently asked questions

How Simultaneous Chat works

Service more shoppers simultaneously.
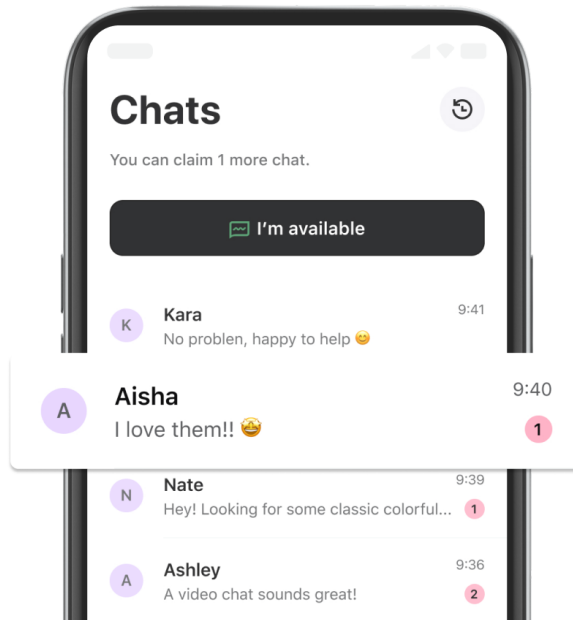
Simultaneous Chat unlocks the opportunity for product experts to service more shoppers simultaneously.

Better coverage and fewer missed chats mean opening the chance to service more customers and, ultimately drive more sales.

In a nutshell, this means:
  Fewer missed sales opportunities.
  Boosted product expert efficiency.
  Service more shoppers with fewer staff.

Simultaneous Chat is the new default chat experience for product experts, but you can change the maximum number of chats (3 is the default).

Just go to the **Store App Settings** section in the Dashboard.

Frequently asked questions

Can simultaneous chat be switched off?

In short, no. However, all merchants can decide the maximum number of chats their experts can have. That means you can select a maximum number of 1 chat, and maintain a 1:1 connection between one expert and one shopper.

What maximum number of simultaneous chats is the default, and why?

The default max number of chats is 3 but the maximum of 20. Based on our learnings during the beta, this is the sweet spot for most merchants. They benefit from increased chat coverage without becoming stressful for experts.

What should experts do if the max chat number is too high to cope with?

The max chat number is only ever the max potential number. Suppose you, for example, have 2 chats that take lots of focus and time. In that case, experts can set themselves to unavailable and only receive further chats once they are ready for more.

What number of chats should we set as the maximum?

The answer to this depends on several factors, including chat demand and team size. So far, in the beta, we have seen a sweet spot of 3-5 chats. But this is something your team will need to experiment with.

How do we change the maximum number of chats?

Go to the Virtual Shopping Store App settings section in the Dashboard. The default is set to a maximum of 3 chats. The maximum number will be 20. The minimum number is 1.

How does the combination of video calling and simultaneous chat work?

You can only be in one video call at a time. However, you'll now see banners while in a video call to support ease of use. But these banners can't be clicked; they are simply notifications of new incoming chats. This shows when actions are occurring in other chats, so product experts can choose to wrap up a video call.
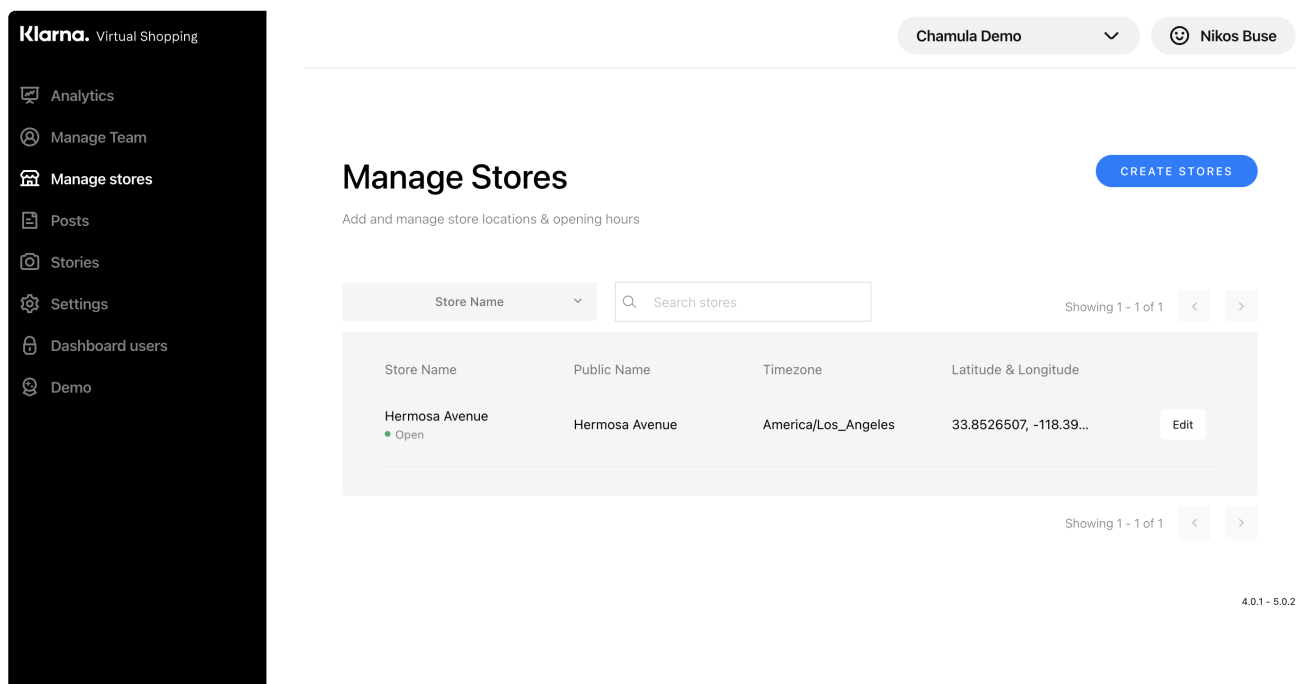
Management Tools

Manage Stores Index

Easily update and Manage Store Settings

The **Manage Stores Index** lets Store Managers and Head Office users see the basic details and status of their stores in one location. This page is also the starting point for creating new store locations on Virtual Shopping, and for editing any existing store locations.

Here, you can see each of your stores, complete with basic information including stores' current status (open or closed), the timezone they're in, and the latitude and longitude of their physical location.

To quickly see a store's opening hours, you can hover over the current status under the store name.

> ⓘ The tool will only work for users with the right level of access permissions. Currently, all users with Manage Team permissions also have access to Manage Stores.
>
> To request changes to permissions for Dashboard users, contact your Virtual Shopping account manager.

Manage Stores Index FAQ

What's the difference between store name and public name?

The public name is the name that customers will see for your store. "Store Name" or "Internal Name" is the name that your in-store experts will see when they see store details in the app.

How quickly do updates to store settings updates go live?

Store settings updates should be present within the Store App and On-site Chat within 5 minutes of changing the settings in the Dashboard.

Who can use this feature?

This feature will initially be made available to all users with Manage Team permissions. Any other individual with Dashboard access can be given Manage Stores if requested.

Can I add new user permissions?

To have new Manage Stores users added to your account, please speak with Support or your PST.

I am unfamiliar with these time zones. How do I find the right timezone for each store?

When creating a store, your store's timezone will be applied automatically. You simply need to enter your store's address on the Create Store page, and then select the matching address that appears in the dropdown below. Once that's done, your timezone will be set based on the Google Places API.

Account

Account overview

Configuring your Virtual Shopping account 🏢
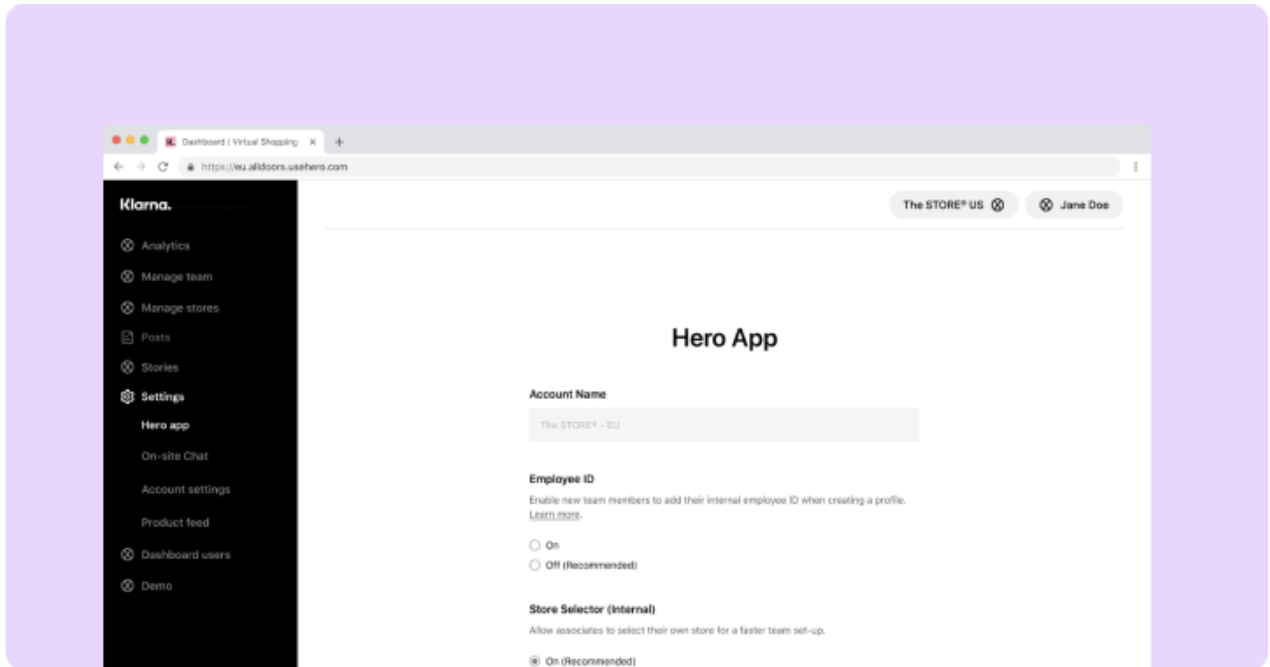
From **Account Settings,** you can make changes to your product feed, team and store set-up, and more:

📄 Product Feed

📄 Currency

📄 Time zone

📄 Team availability

📄 Out of operating hours

Left Message SMS sender ID

Left Message expired URL
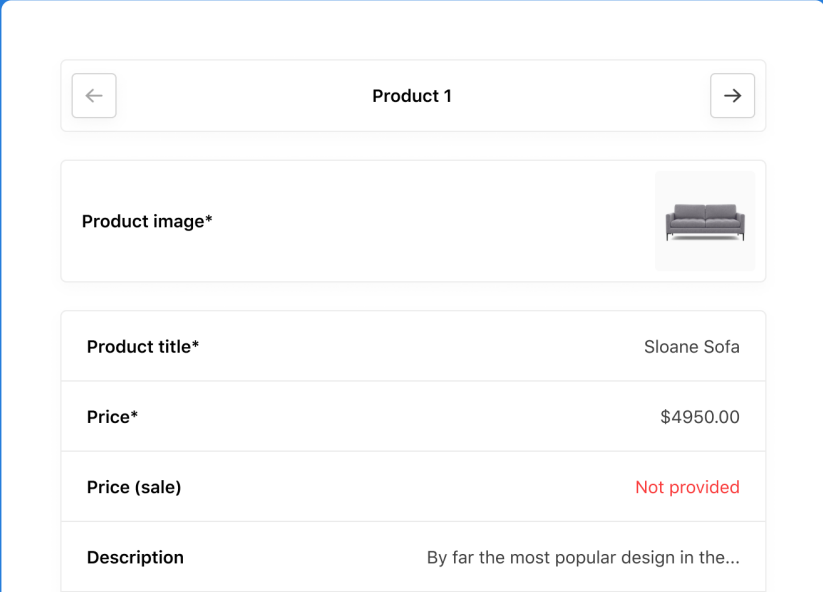
Department settings

Adding a new department

Product Feed

Empowering product recommendations 👕

The Product Feed makes it possible for your team to share product recommendations with shoppers.

We'll walk you through each step to set up your Product Feed.

> ⓘ The tool will only work if your Product Feed meets the following criteria:
>
> - CSV-format(comma-separated, tab-separated, or pipe-separated values format)
> - Hosted on a publicly-available URL
> - Include all required fields (as set out in the 'Must Have' fields)
>
> If your Product Feed does not meet these criteria, get in touch with us. If you have already set up your Product Feed, you won't need to use this tool.

How to set up your Product Feed

In just a few steps, you can ensure that your feed is being indexed and updated on a regular basis, using whatever schedule works best for you.

> ⓘ To index your Product Feed, you will need access to the Dashboard Settings. If you do not have access, get in touch with your account manager to request access.

Step 1. Initial setup 🏁

Invite code	Application ID	
		Showing 1-2 of 2
HND1938	b3fbc536-ec10-45ff-9178-583a495c47f4	⚙ Edit
HND1283	b3fbc536-ec10-45ff-9178-583a495c29x3	⚙ Edit

1. **Go to Settings and click on the 'Edit' button.** From there, select the Product Feed option in the Settings menu. Here, you will see an overview of the 3 steps to set up your feed. Now you can move into the setup flow.

Product Feed link

Add your Product Feed link in CSV format. Check out our CSV template as an example.

> e.g. www.the-store.co/api/ProductFeed

CSV Product Feed type

Select your Product Feed type

- ⦿ Comma-separated
- ◯ Tab-separated
- ◯ Pipe-separated

2. **Add the URL for your Product Feed** and choose whether it is organized in a comma-separated, tab-separated, or pipe-separated format.

Product Feed index rate

Set how frequently each day the Product Feed will be re-indexed. This will be based on how often you update it.

1x daily (every 24 hours)

Index time

Set when the first indexing of the day should happen. We recommend picking a time after your feed is updated.

First index time

09:00

Timezone

BST

3. **Choose how often Virtual Shopping tries to update the Product Feed to the Store App.** The frequency should align with how often you update or change your Product Feed so that what product experts and shoppers see during a chat mirrors what appears on the website. You can select an index frequency between 1x and 4x per day and set the time at which they would like the first index.

Decimal separator

Does your Product Feed use points or commas within numbers? If you're unsure, take a look at a price from your feed to see.

◉ Decimal point
   e.g. 100.00

○ Decimal comma
   e.g. 100,00

Double quote wrapping

Are values within your Product Feed enclosed (i.e. "wrapped") between double quote marks?

◉ Yes, double quote wrapping is used
   e.g. description: "Our model is 5'11"" and wears a size medium."

○ No, double quote wrapping is not used
   e.g. description: Our model is 5'11" and wears a size medium.

4. **To ensure fields map correctly, choose whether your feed uses decimal points or decimal commas** (i.e 100.00 or 100,00) for pricing or whether you use double quote wrapping (i.e " or ') for item descriptions in the Product Feed.

Importing attributes

This may take a minute, so don't refresh the page or it might not work.
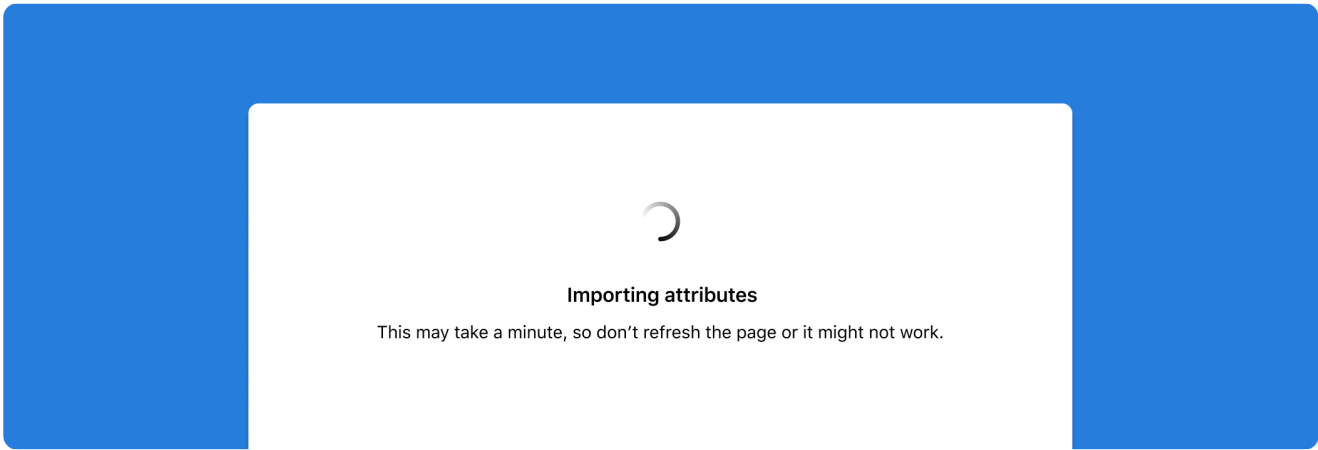
Initial setup is complete! You'll see a message that says: 'Importing attributes'. If any of the information you input in step 1 needs to be changed, you'll be notified at this stage and pointed back to this first step to make adjustments.

Step 2. Attribute mapping 🗺️

Now it's time to match the attributes in your Product Feed to Virtual Shopping's required and pre-defined attributes.

At this stage, you can set up Virtual Shopping to describe particular Product IDs or SKUs differently from the way they appear in your actual Product Feed. Having this flexibility should help you provide the best possible Product Feed experience for product experts – and prevent accidental or incorrect matches.

1. The tool will alert you about the number of attributes that were grabbed from your feed, all of which will be added to drop-downs on the page.

Attribute mapping

We found 20 attributes from your Product Feed and mapped them out in the dropdowns below. Take a look at each one to make sure they've been mapped correctly.

Product ID (required)

Your product's unique identifier, sometimes known as an SKU

| id | ⌄ |

Item Group ID

ID for a group of products that come in different versions (variants)

| item_group_id | ⌄ |
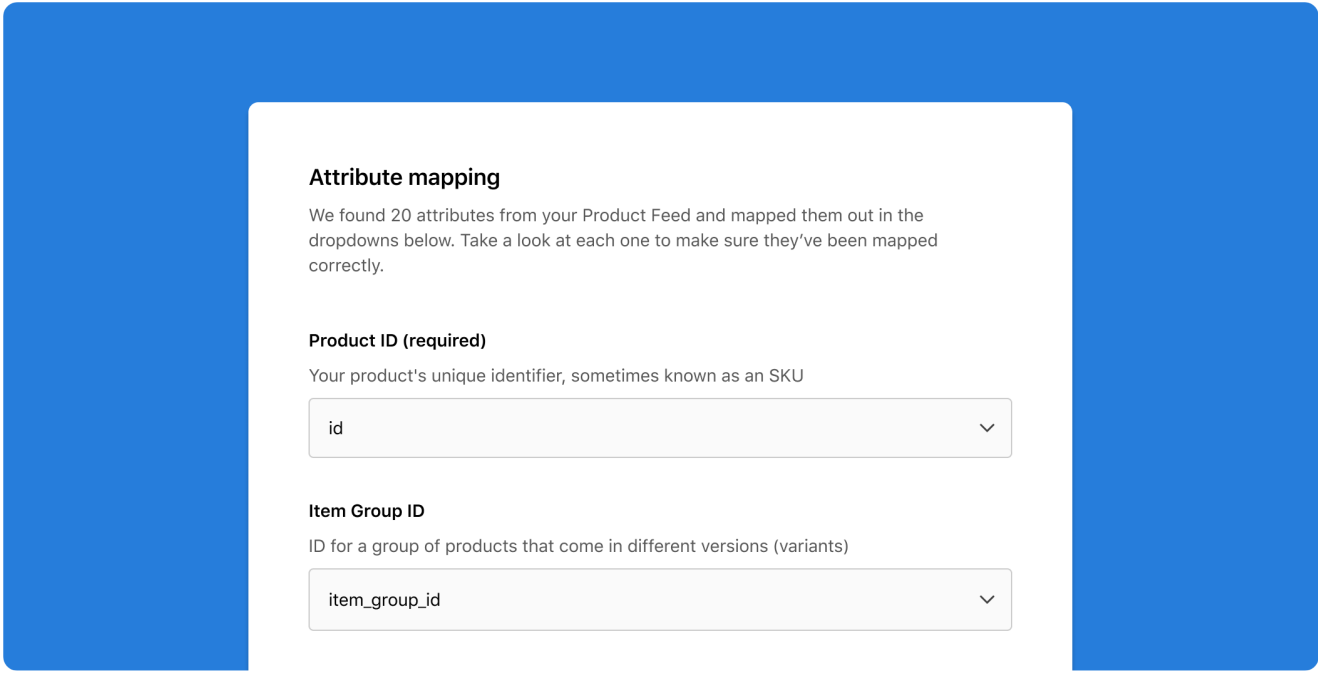
2. Review each attribute field, and select from the drop-down header from the feed that matches the Virtual Shopping attribute.

All headers from your Product Feed will appear in the drop downs so you can easily match headers to attributes.

> ⚠ Once an entry on the dropdown has been used, it cannot be reused for another field.

3. Enter a value for each field marked as 'required'. You'll need to enter values for each required field to proceed to the final setup step.

> ✓ We recommend that you fill out all additional fields, if possible. The more information you can provide, the better the experience will be for product experts and shoppers.

Step 2 is complete! Now you can finish setup by previewing how your Product Feed will appear to product experts*.*

Step 3. Product preview 🔭

To finish, you can preview what the Product Feed experience will look like for product experts and shoppers. This makes it easy to see if you will need to change any of the field mappings you made in the previous step.

1. **Review the first 9 products using the arrow buttons on the screen to confirm mappings are correct.** For each product, you will want to confirm that the product title, price, description, SKU Code, and URL are all correct.

Product preview

Take a look at your product feed to make sure the attributes have been mapped correctly

←	Product 1	→

Product image*	

Product title*	Sloane Sofa
Price*	$4950.00

2. **Now you can compare what the product preview is displaying against the information displayed on your website.** Click on the product URL located at the bottom of the table and open the URL in a new tab, so you can compare.

Price*	$4950.00
Price (sale)	Not provided
Description	By far the most popular design in the...
Product SKU code	274-239-191
Product URL	https://www.the-store.co/sofas/sloane

3. **If you need to make any changes, simply head back to Step 2** by tapping the back arrow on the top of the screen.

Add Product Feed

Product preview

Take a look at your product feed to make sure the attributes have been mapped correctly
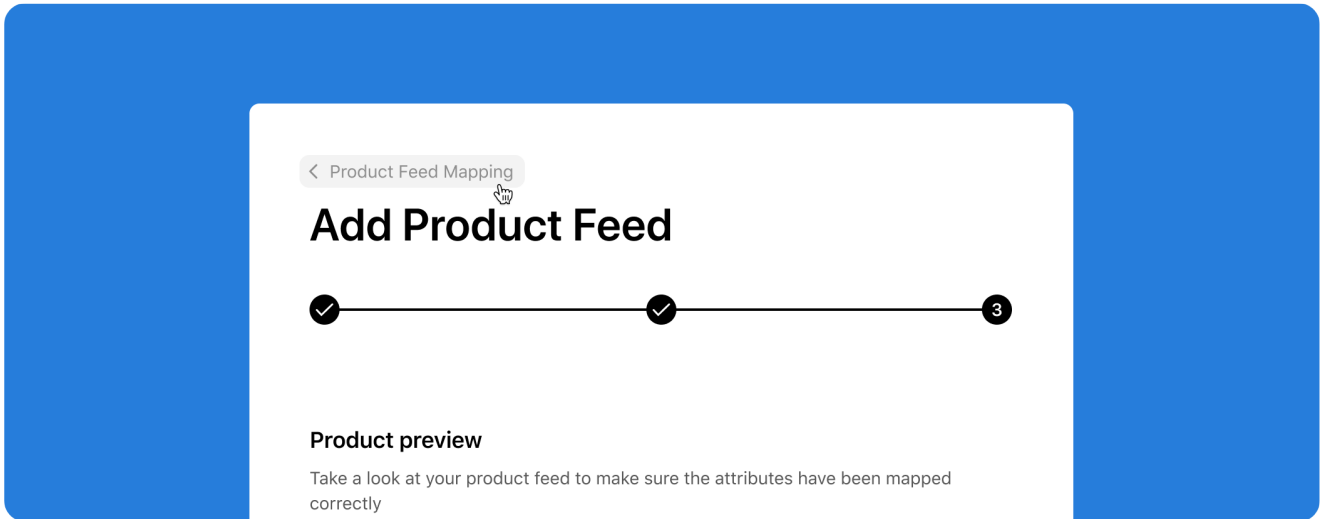
4. **If all fields look correct, select 'Finish'.**

Super! Your Product Feed set-up is complete and its first indexing has begun. Once indexing is complete, you'll receive a confirmation email.

> ⓘ While the feed is indexing, you won't be able to make any changes to mappings. If you need to make a change, you will be able to do so after receiving your email confirmation that indexing has finished.

Managing your Product Feed and Solving Issues 💁‍♂️

After initial setup, if there are issues with your Product Feed feed you will receive alerts on its status. These alerts are there to notify you of any issues so you can quickly take steps to fix them.

Your Product Feed

⚠ **Minor errors detected**
Your Product Feed is operational, but there are some minor issues.
Check the error report for more details.
Indexed: 11 Feb 2019 13:59pm

[Download report]
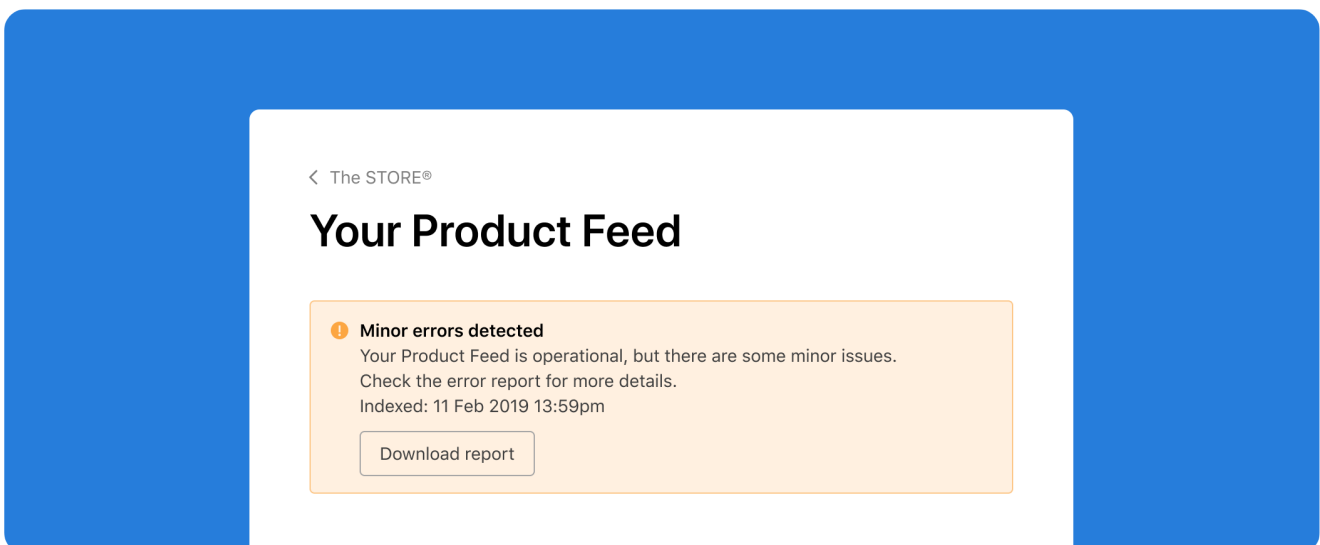
Currency

Setting Currency $
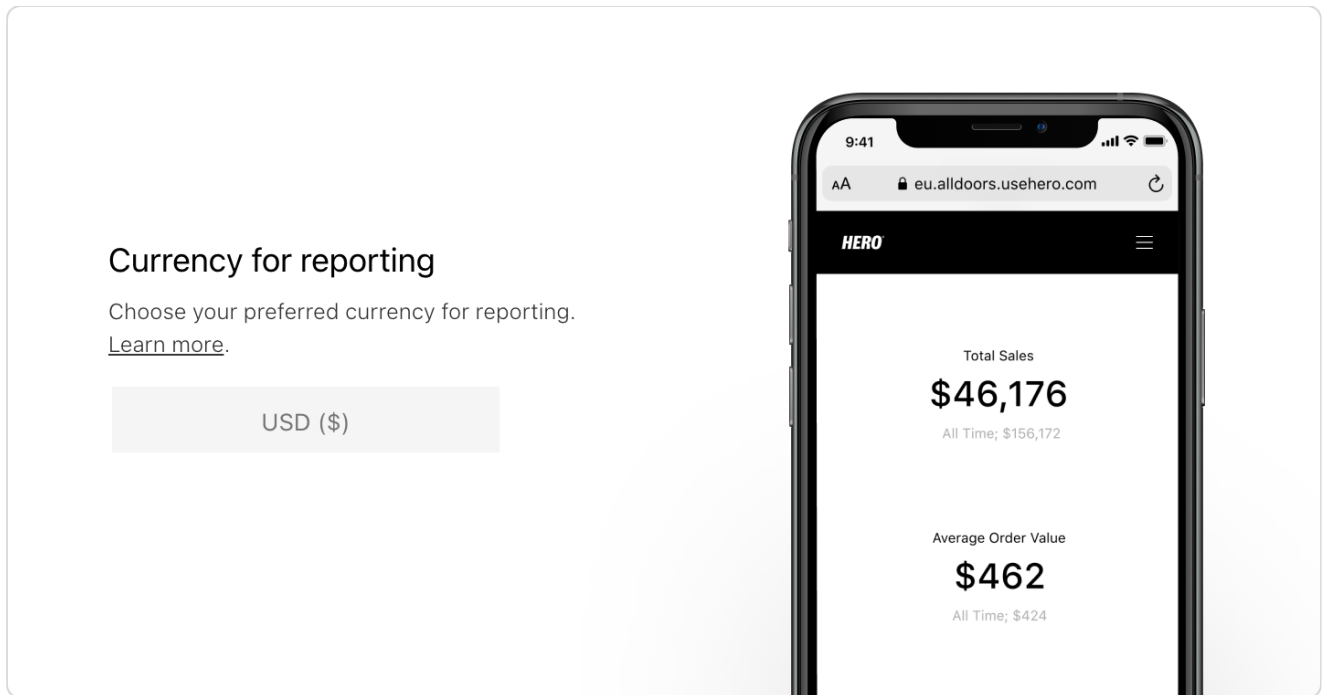
The currency selector enables a user to determine which currency is used for reporting across Virtual Shopping, from Dashboard to the Store App.

Select the currency for the dashboard. Currencies are denoted by three-letter alpha-3 codes together with their currency symbol, e.g. USD, $.

> ✓ We recommend you select the currency that reflects how your headquarters tracks sales. For global organizations, this will mean that Virtual Shopping reports are applicable to the widest range of geographies.

Time zone

Setting your time zone 🎛️

The Time Zone selector lets you set the time zone for your data reporting in the Dashboard.

To set a time zone for reports, you should select a time zone from the dropdown on the Account Settings page. Time zones are listed in Internet Assigned Numbers Authority (IANA) or Time Zone Database format to ensure the best possible accuracy at all times. You can check for your time zone here.

> ✅ We recommend you set the time zone that reflects the time zone of your headquarters. For global organizations, this will mean that Hero reports are applicable to the widest range of geographies.

Contacts

Giving your teams access to Contacts ✉
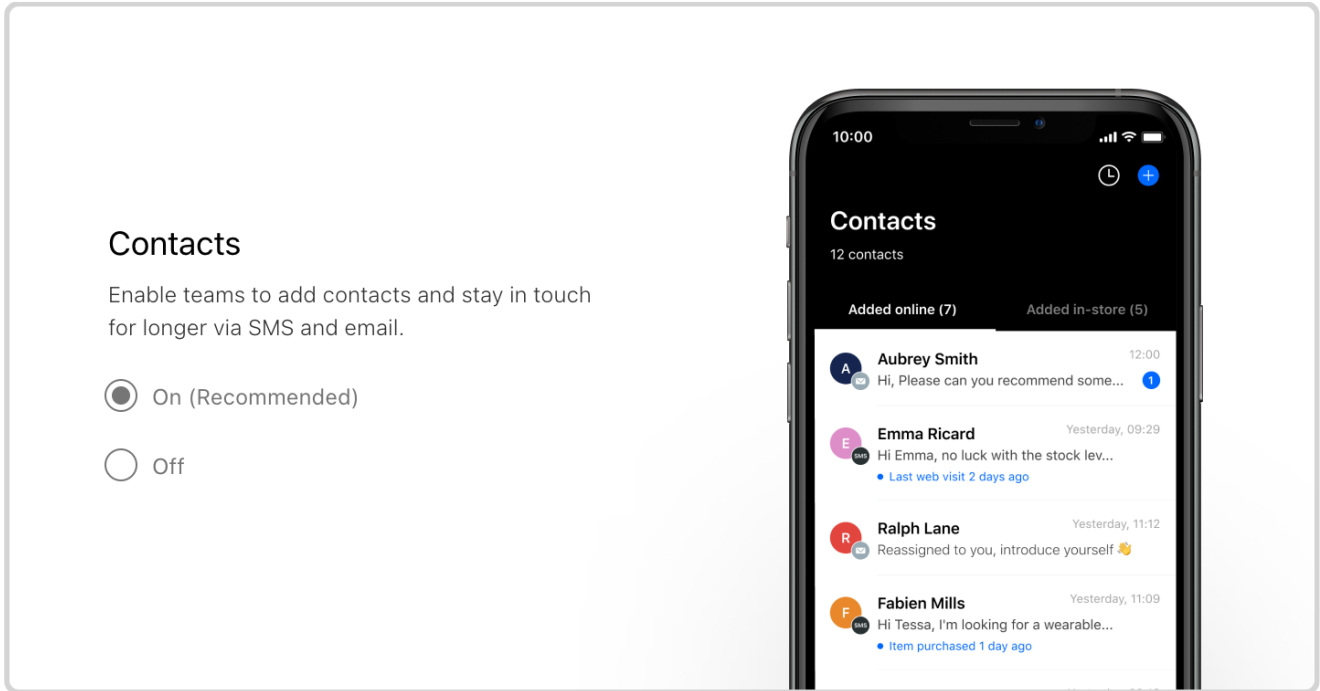
Contacts empowers your store teams to keep the conversation going over email, text, or WhatsApp to drive repeat sales.

With Contacts switched on, it will appear for all teams the next time they launch the Store App.

Switching Contacts off will turn off the feature for all store teams and they will be unable to keep in touch with shoppers after their initial chat.

> ✅ We recommend switching Contacts on. For more information on what setting is best for you, please contact your Customer Success Manager.

Team availability

Setting Virtual Shopping to appear based on your team's availability 🌓

You can set On-site Chat to either always appear regardless of your team's availability, or only appear when at least one expert in your team is available to chat.

> ✅ We usually recommend switching this on. To discuss which is the best setting for you, please speak with your Customer Success Manager.

Out of operating hours

Setting Virtual Shopping to appear based on operating hours 🕐

Here you can set whether the On-site Chat plugin will always appear or only when your teams are online.

By allowing shoppers to leave a message at any time, the plugin will show when your teams are busy and when they are offline outside of operating hours.

This will apply even if you've selected to only show the plugin when your teams are available in the previous setting.

> ✓ We recommend letting shoppers leave a message when your teams are busy or not working so that your shoppers always have a way to get in touch. If you need help working out the best setting for you, please speak with your Customer Success Manager.

Left Message SMS sender ID

Setting the name shoppers see in lead responses 👥
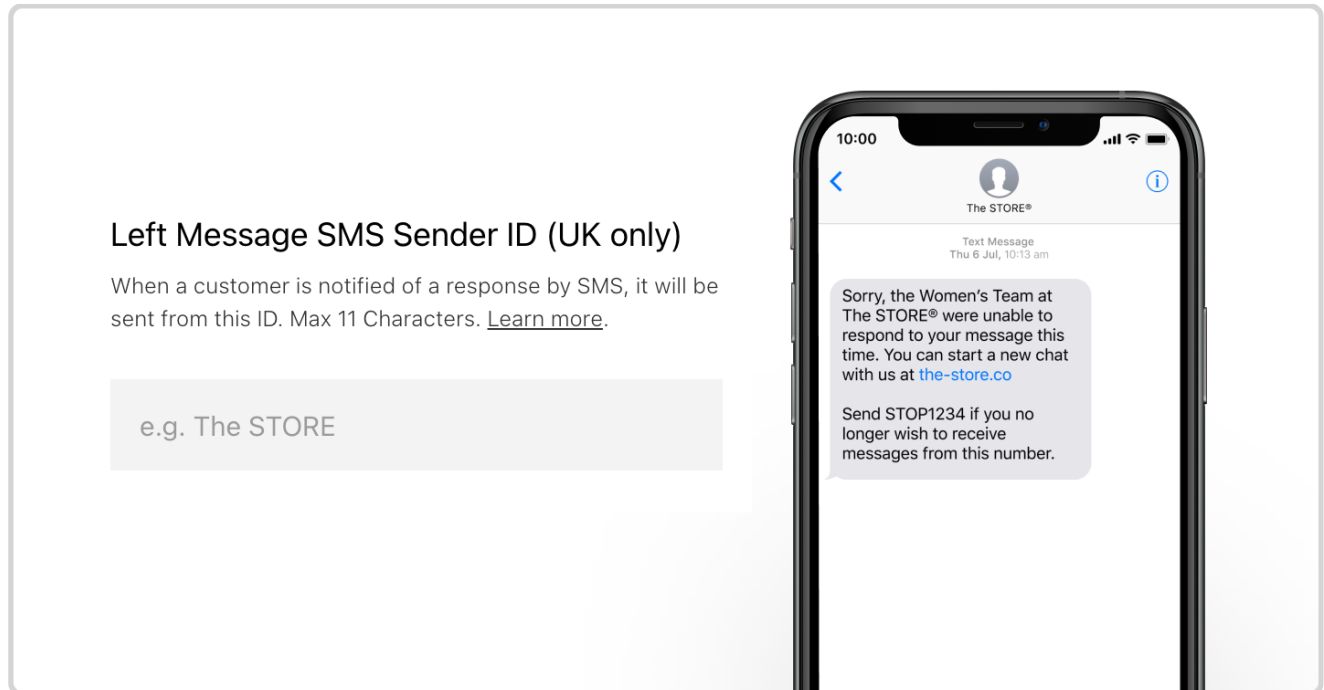
You can determine the name from whom responses to lead messages will be sent.

> ⚠️ This feature is currently only available in the United Kingdom.

The Get Notified Sender ID is the contact name that a shopper will see when they receive a response to a lead query. This name will appear instead of a random multi-digit code and is usually best set as your brand name.

To set a Sender ID, users should input a name for their brand between 3 and 11 characters. This name will then appear on all lead responses.

> ✅ Where possible, we recommend you add a Left Message SMS Sender ID to make the experience feel more branded. We also recommend you add the name of your organization or an abbreviation as this will help shoppers know what to expect from this interaction.

Left Message expired URL

Setting where to send shoppers if their lead query expires 🔗
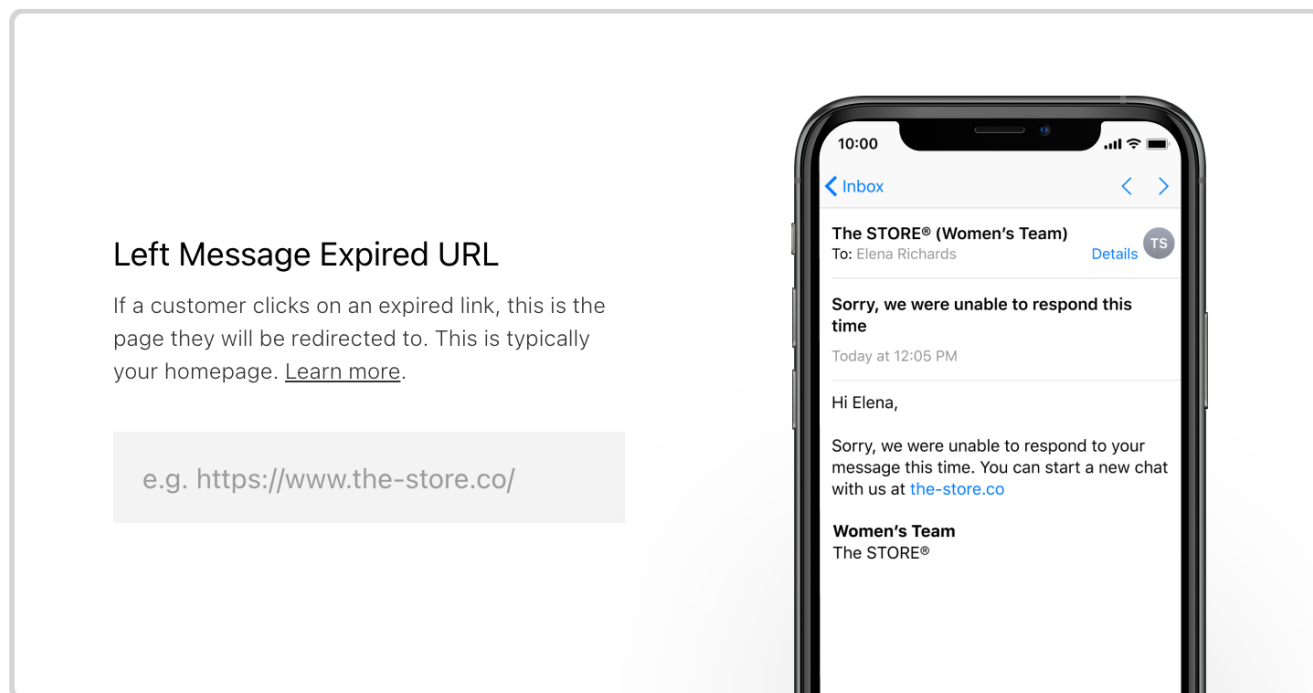
If a team member does not respond to a lead message within 48 hours, the message will expire. In this case, the shopper will receive a message explaining that their chat has expired with a link to direct them as to what to do next.

You can input the URL for directing shoppers when they receive this expiration message.

> ✅ We recommend you enter your homepage as the Left Message Expired URL as this is usually the most relevant place to send a shopper at this point, regardless of the nature of their lead query.

Department settings

Key information on your departments 🏬 ℹ️

Department Settings provides you with an overview of currently-enabled departments. This is where you can edit any details related to each department.

Department Settings provides you with an overview of the all the departments in your organization, and includes key information about each department, specifically:

1. Department name
2. Number of team members in each department
3. Department ID

You can also edit the department's name to repurpose a department if you need to change how you structure teams on Virtual Shopping.
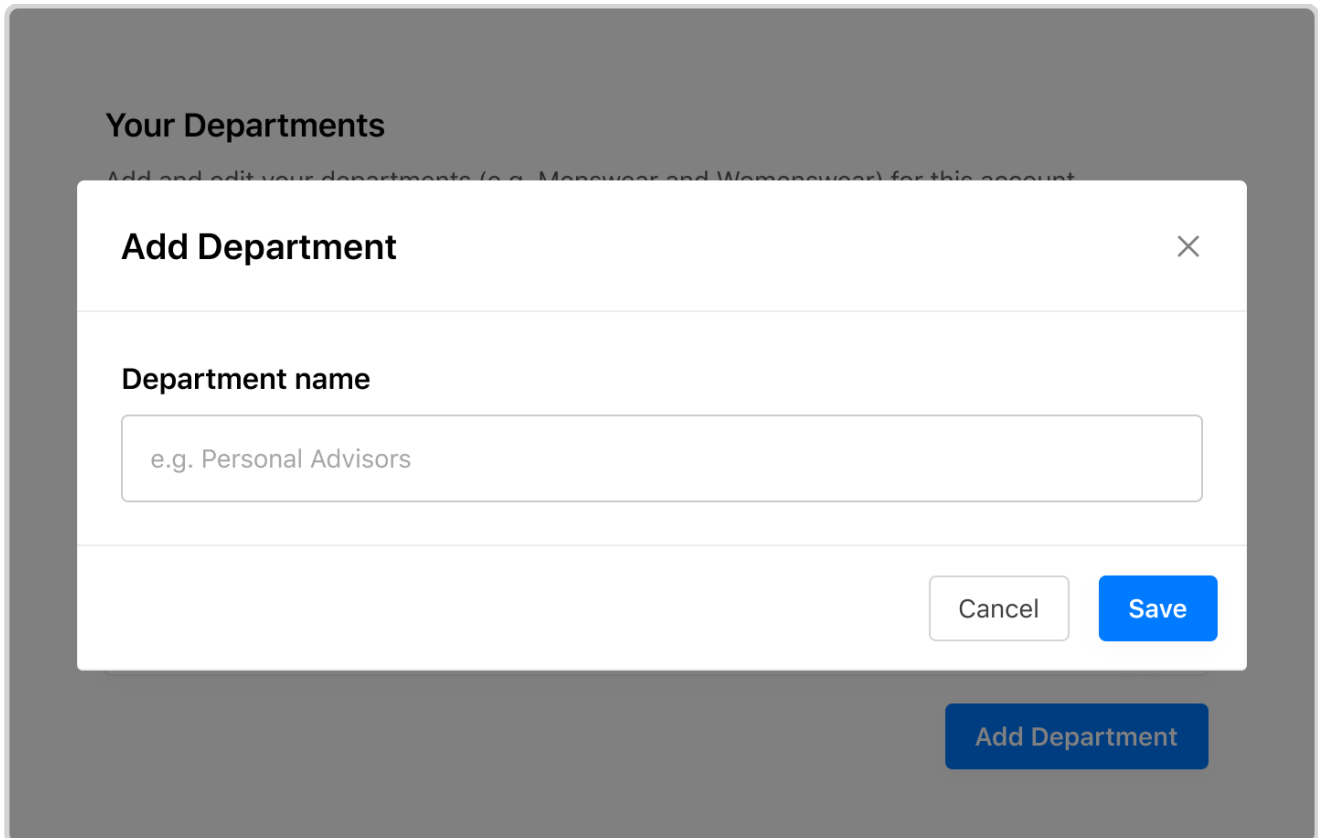
You will need the department ID if you want to implement department filtering, detailed in our technical implementation docs.

⚠ It is not possible to deactivate a department in these settings. If you need to do this, please contact Support or your Customer Success Manager.

Adding a new department

Add new departments in Virtual Shopping 🏬 ➕

You can set up new departments in Virtual Shopping to route shoppers to different store teams.

The department creation flow is found under **Department Settings**.

To create a new department:

1. Select 'Add Department' at the bottom of the Department Settings page.
2. Use the text input modal to enter a department name.
3. Fill in the drop-down format and select an appropriate Product Feed for the department in question.
4. Select 'Finish'.

> ⚠️ Because this process can have implications for your data, the team, and the shopper experience, we recommend you go through this process with your Customer Success Manager.

Zendesk integration

One place for Virtual Shopping and Zendesk chats 🗣️
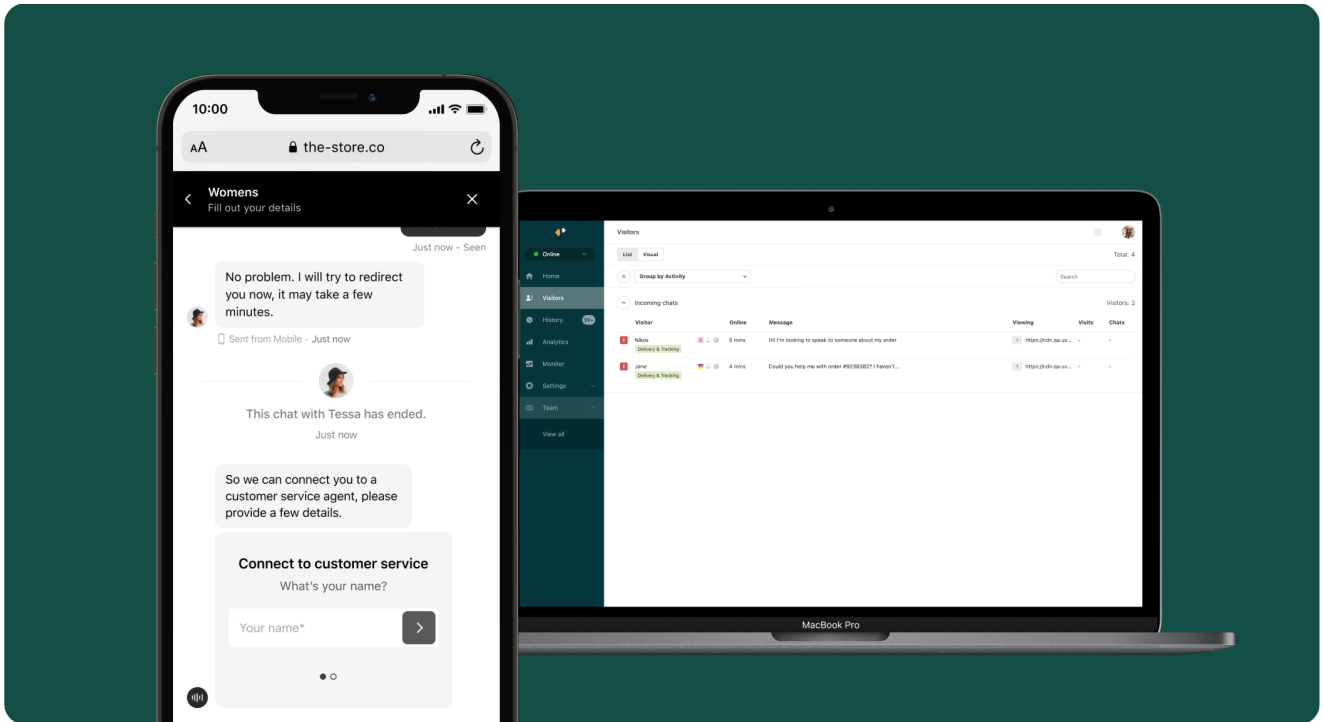
Virtual Shopping integrates seamlessly with Zendesk Chat. By switching on this integration, your shoppers can chat directly with your Customer Service teams without needing to leave their Virtual Shopping online chat.

With this integration switched on, you can help shoppers get the support they need quickly, save your team time and streamline your website experience.

In this guide, you'll learn:

✅ How shoppers can move from a Virtual Shopping chat to a Customer Service chat
✅ What the shopper experience looks and feels like
✅ Which Zendesk features are available to shoppers within the Virtual Shopping chat

To get started, jump straight in:

📄 How shoppers start a Zendesk chat

📄 User journey example

Activating your Zendesk integration

Added features overview

Frequently Asked Questions

How shoppers start a Zendesk chat

Starting customer service chats

Shoppers can start a chat with Zendesk Customer Service teams from within a Virtual Shopping chat in 2 ways: via the Needs Selector or by being transferred by an expert using the store app.

The Needs Selector
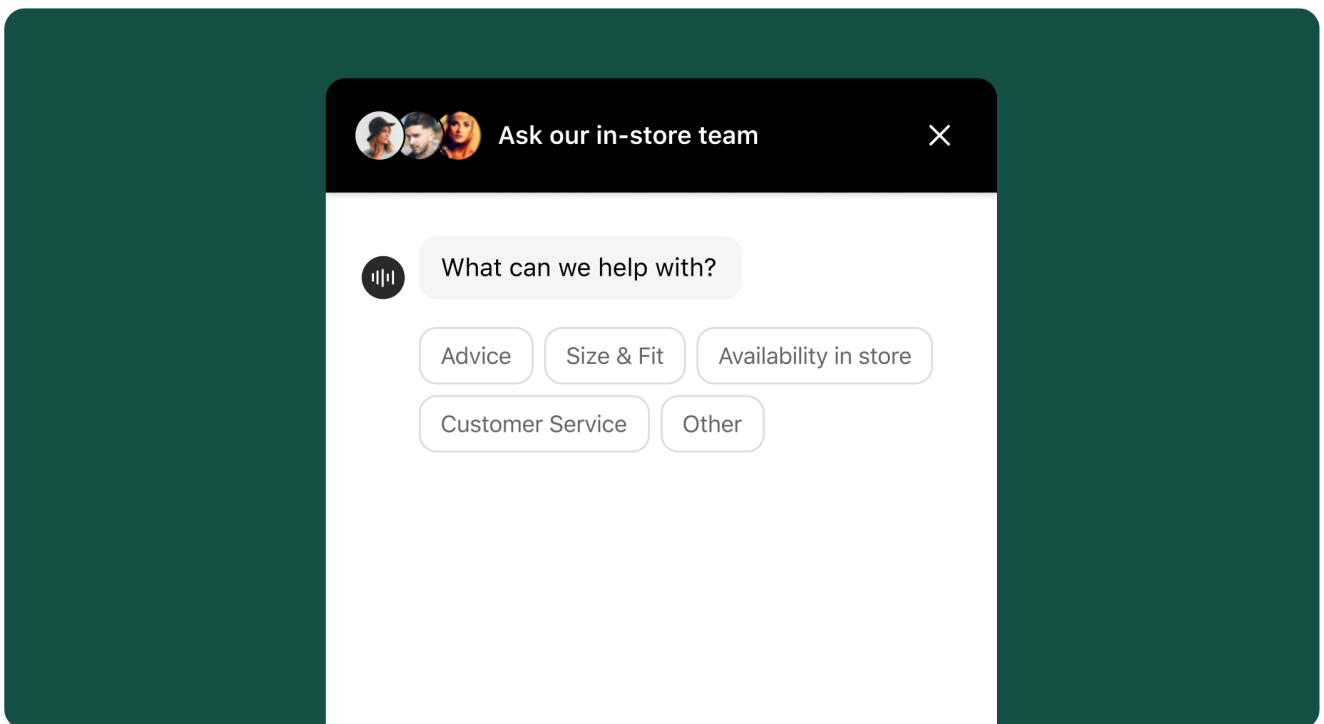
When a shopper is shown the Needs Selector in an online chat, they can select the 'Customer Service' option to start a dialogue with a Zendesk Customer Service team.

Review a common user journey here:

> 📄 User journey example

The in-app transfer menu
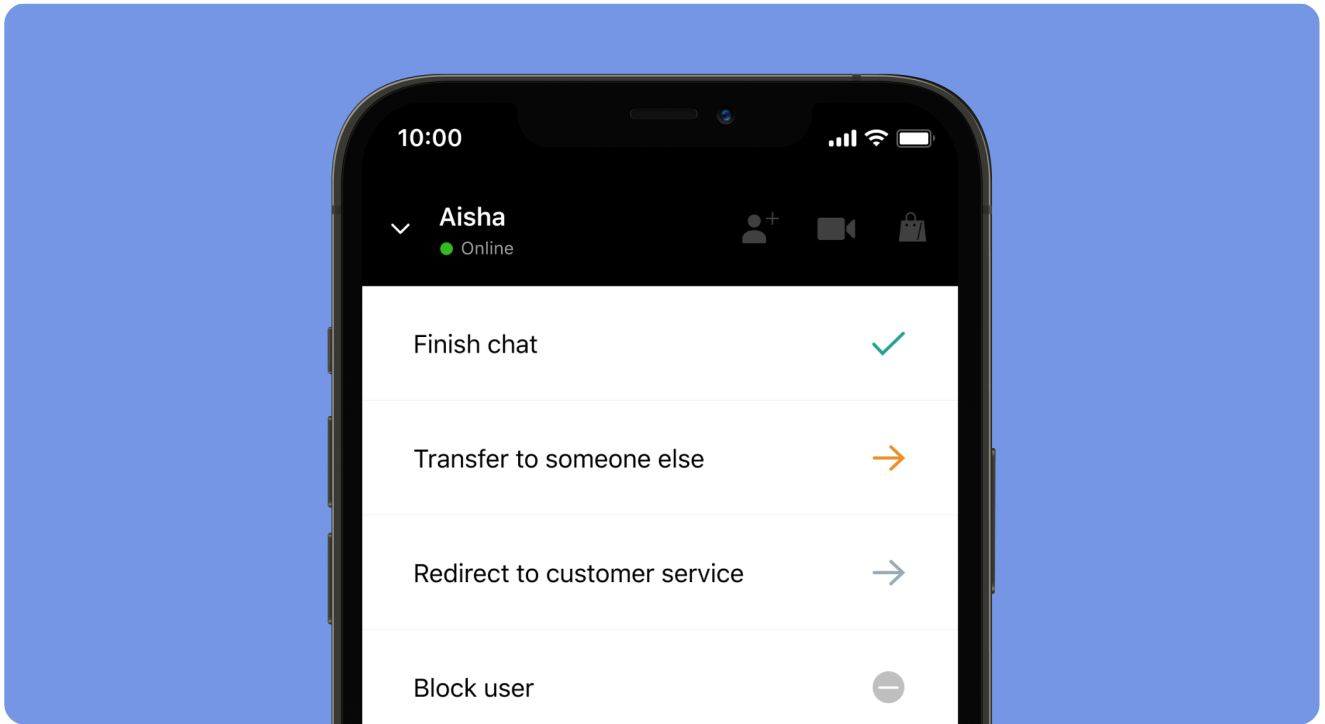
The in-app transfer menu makes it possible for experts to divert shoppers to Zendesk Customer Service teams. This menu is available once your Zendesk integration has been switched on and the Virtual team has switched on the 'transfer menu'.

Experts can then select 'Redirect to Customer Services' from the transfer menu to pass shoppers over to your Customer Service team.

User journey example
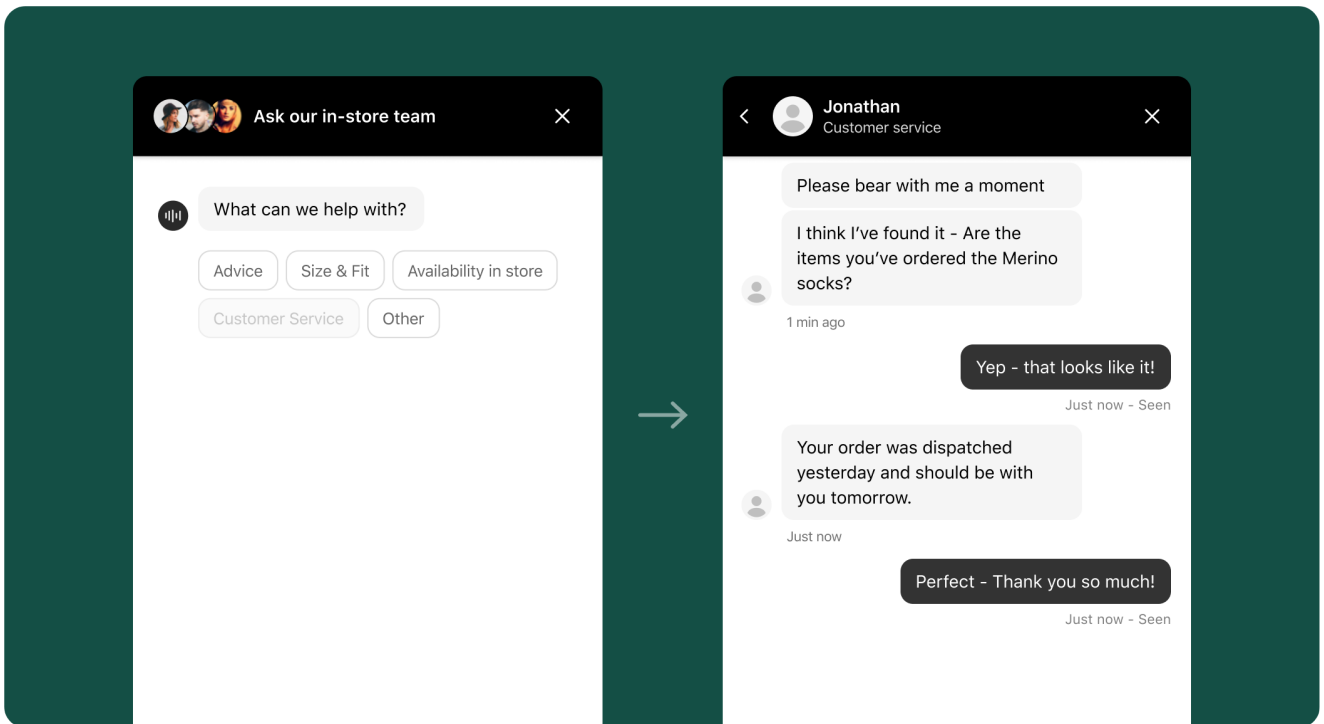
Here is a step-by-step example of the journey a shopper may take from opening a Virtual Shopping chat to starting a conversation with your Customer Service team:

Step 1: the shopper selects the 'Customer Service' option from the Needs Selector in the Plugin
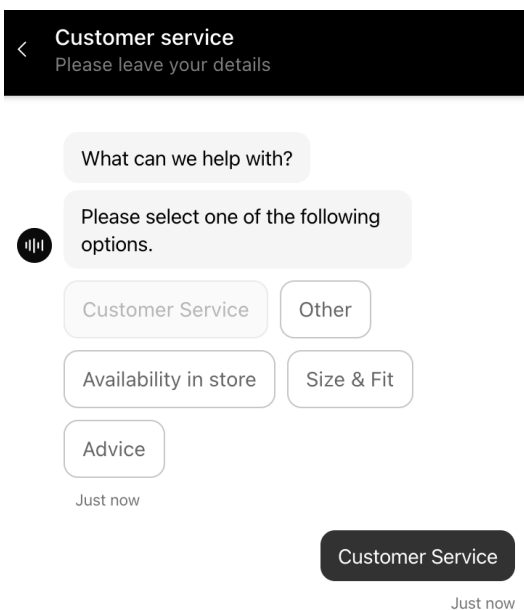
Step 2: The Zendesk Customer Service form appears within the Virtual Shopping online chat. The shopper must submit their name and email address before they can begin a chat with Customer Service teams.

Customer Service

1 minute ago

Customer Service

2 minutes ago

So we can connect you to a Customer Service agent, please provide a few details.

So we can connect you to a Customer Service agent, please provide a few details.

Connect to Customer Service

What's your full name?

Tim

>

1 minute ago

Connect to Customer Service

What's your email address?

Tim.bedwell@sayhero.c

>

1 minute ago
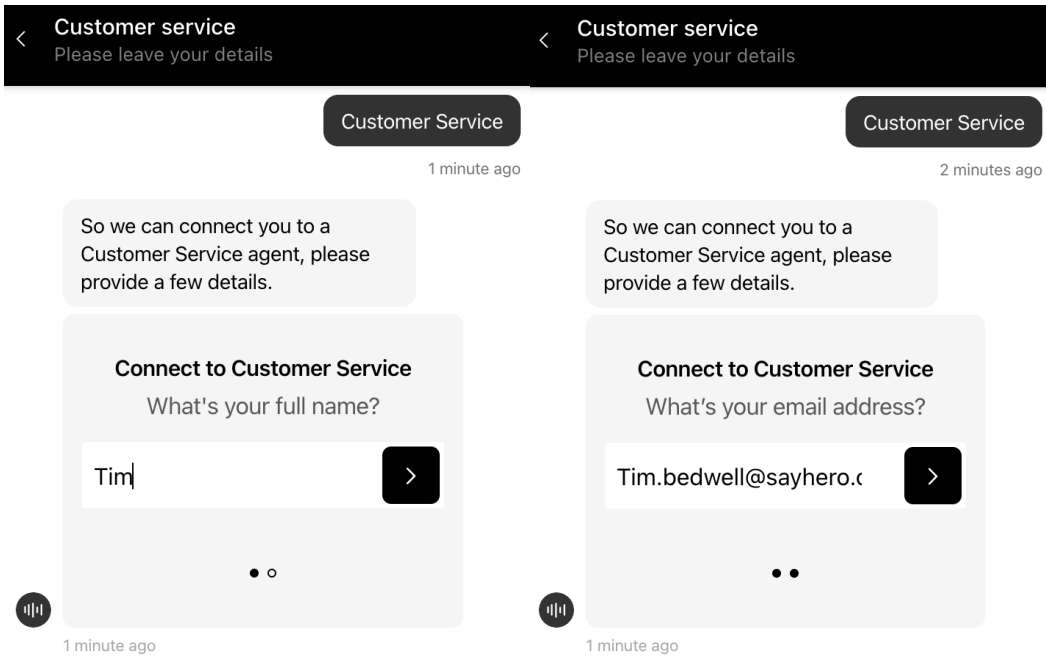
Step 3: Your Zendesk Customer Service Team selector is shown

Customer Service
Select an option

Please select a Customer Service team from the list below.

Delivery & Tracking

Returns, Refunds & Faulty Products

Just now
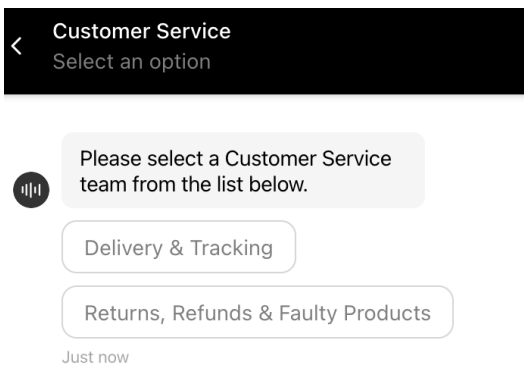
Step 4: The shopper selects the most relevant Customer Service team for their enquiry

Delivery & Tracking

Please select a Customer Service team from the list below.

Delivery & Tracking

Returns, Refunds & Faulty Products

Just now

Delivery & Tracking

Just now

How can we help?

Just now
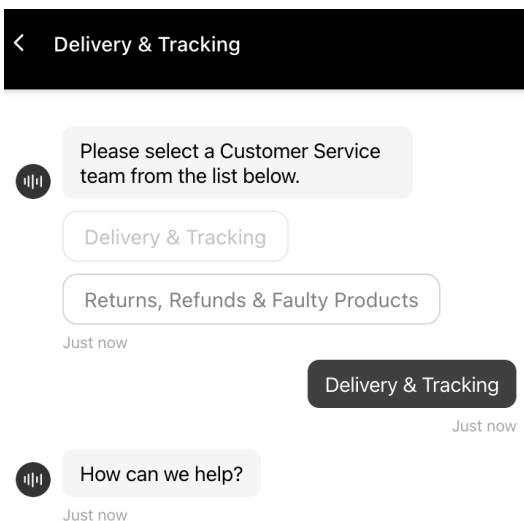
Step 5: If the Customer Service team is currently busy, the shopper may be held in a queue. The Shopper is informed of their position in the queue.

Delivery & Tracking

Returns, Refunds & Faulty Products

1 minutes ago

Delivery & Tracking

Just now

How can we help?

Just now

Can you help me with the delivery date for my order, please?

Just now

Thanks. We're waiting for an agent to become available.
You're next in line.
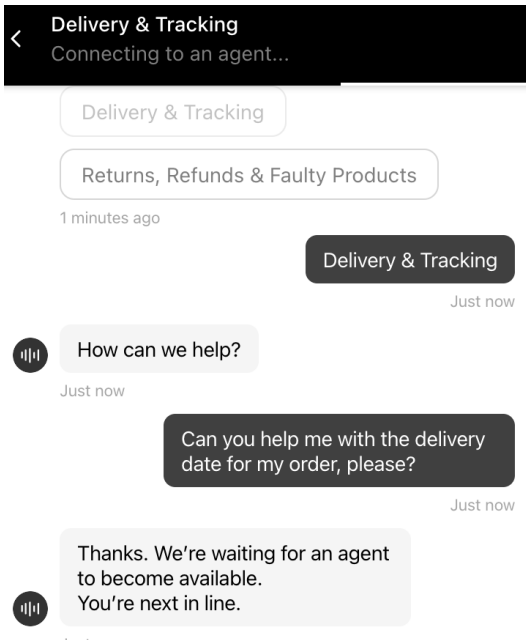
Step 6: The shopper is informed when a Customer Service agent joins the chat

< Hero One
Delivery & Tracking

2 minutes ago

Can you help me with the delivery date for my order, please?

1 minutes ago

We're waiting for an agent to become available.
You're next in line.

1 minutes ago

Hero One from the Delivery & Tracking team joined this chat

Just now

Hi Tim! Can you let me your order number and I'll review the delivery status, please?

Just now
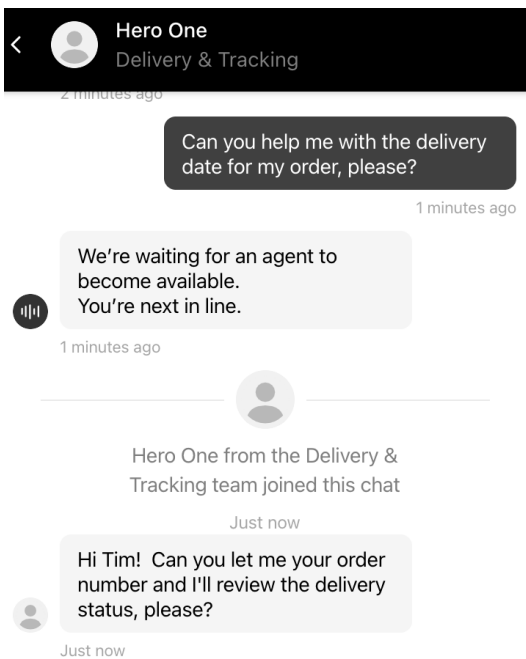
Step 7: When the chat reaches its natural conclusion, the Customer Service agent ends the chat. At this stage, the shopper can rate the chat and click on the 'back to previous chat' button to begin a new chat if they wish

No, that's everything. Thank you.

1 minutes ago

Great, i'll close this conversation now. Thanks for contacting us!

Just now

Hero One from Delivery & Tracking team finished the chat

Just now

How was your conversation with Hero One?

👍 👎

Just now

Back to previous chat
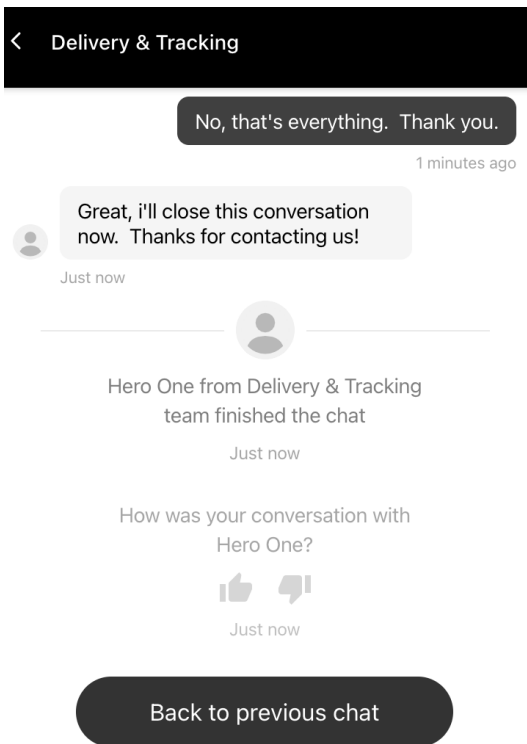
Step 8: on clicking the 'back to previous chat' button, the shopper is presented with the Needs Selector menu where they can select a Need to begin a new chat

4 minutes ago

Still need help with this query? Visit our customer service page for further assistance.

New Chat

Please select one of the following options.

Customer Service   Other

Availability in store   Size & Fit

Advice

Just now
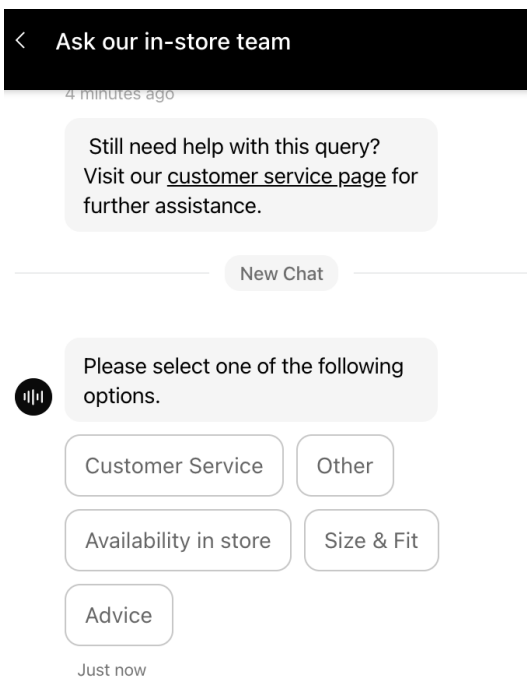
Step 9: After a Customer Service chat has ended, the shopper receives an email containing the transcript of the conversation for their personal records

HERO <support@herotesting.zendesk.com>   5:25 PM (0 minutes ago)
to me ▾

Your request (1390) has been updated. To add additional comments, reply to this email.

Tim test
2 Sep 2021, 17:25 BST

Chat started: 2021-09-02 04:20 PM UTC

(04:20:55 PM) Tim: Can you help me with the delivery date for my order, please?
(04:21:37 PM) *** Hero One joined the chat ***
(04:22:10 PM) Hero One: Hi Tim! Can you let me your order number and I'll review the delivery status, please?
(04:22:47 PM) Tim: Yes, my order number is: 12345
(04:23:03 PM) Hero One: Thanks Tim! Checking the status now.
(04:23:27 PM) Hero One: Okay, i can see your order is due for delivery tomorrow (03/09/21).
(04:23:40 PM) Tim: Great, thank you.
(04:23:51 PM) Hero One: Is there anything else i can help with?
(04:24:04 PM) Tim: No, that's everything. Thank you.
(04:24:49 PM) Hero One: Great, i'll close this conversation now. Thanks for contacting us!
(04:25:02 PM) *** Hero One left the chat ***

📎 Watch an example user journey   122MB
Binary

Activating your Zendesk integration

Simple steps to switch on

It's easy to switch on the Zendesk Integration with Virtual Shopping. To get started, follow these simple steps here.

Added features overview

Smooth transitions between Virtual Shopping and Customer Service

To ensure customer service chats progress smoothly, we have added features to support Zendesk functionality and the overall experience. Check these out below:

Shopper queue – 'Message me later'

As a shopper you can be held in a queue to speak to a Customer Services team. For every 10 minutes, a shopper is held in a queue, Virtual Shopping will raise a message in the chat to ask them whether they'd rather leave a message to be contacted later or continue in the queue.

If the shopper chooses to wait in the queue, they will be informed of their position until they are served by an agent from the Customer Service team they selected.
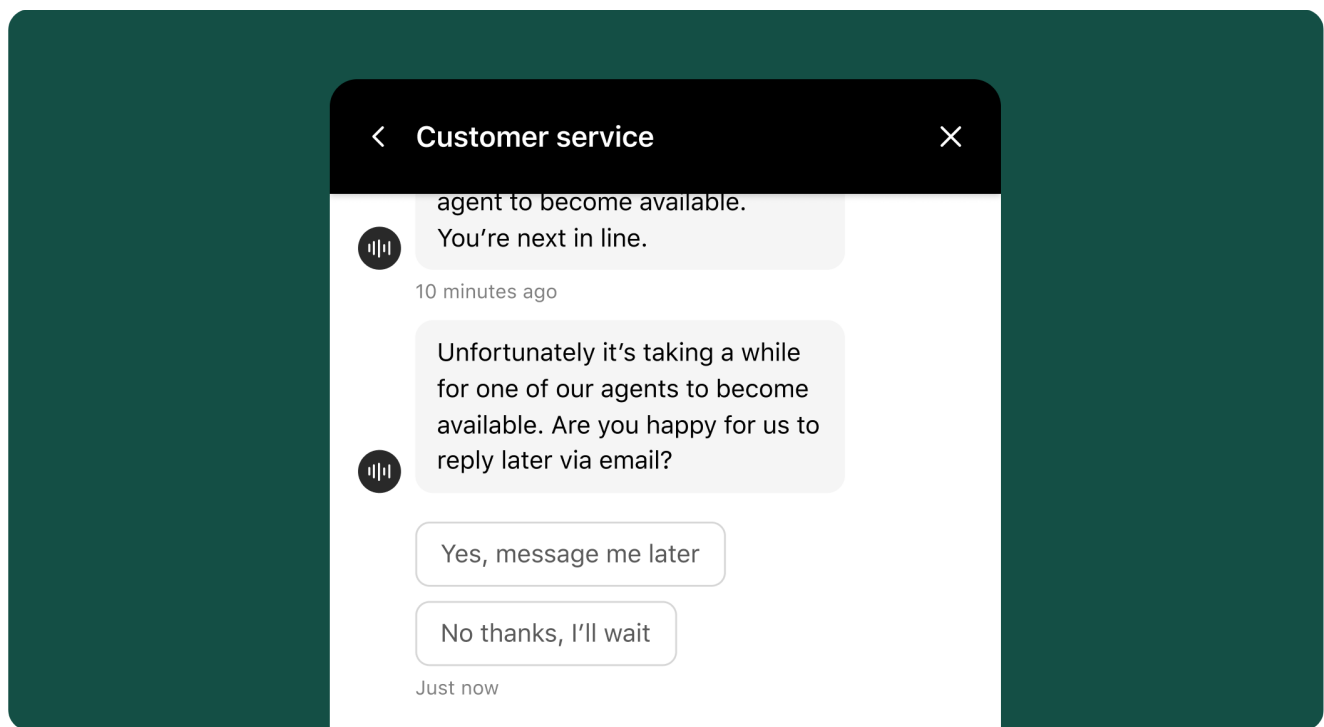
📎 Watch 'Message me later' in action   22MB
Binary

Returning to Virtual Shopping from a Customer Service chat

Shoppers in a Customer Service chat can click on the back arrow in the message header to return to a Virtual Shopping chat. This allows them to refer back to that chat in case there were details discussed there with the Product Expert that would help inform their chat with the Customer Service team.

Please note the shopper won't be able to start a new Virtual Shopping chat until their active Customer Service chat is complete. Therefore, when a shopper returns back to their previous chat they will see a 'Continue chat' button in the chat flow that refers them back to complete the Customer Service conversation.
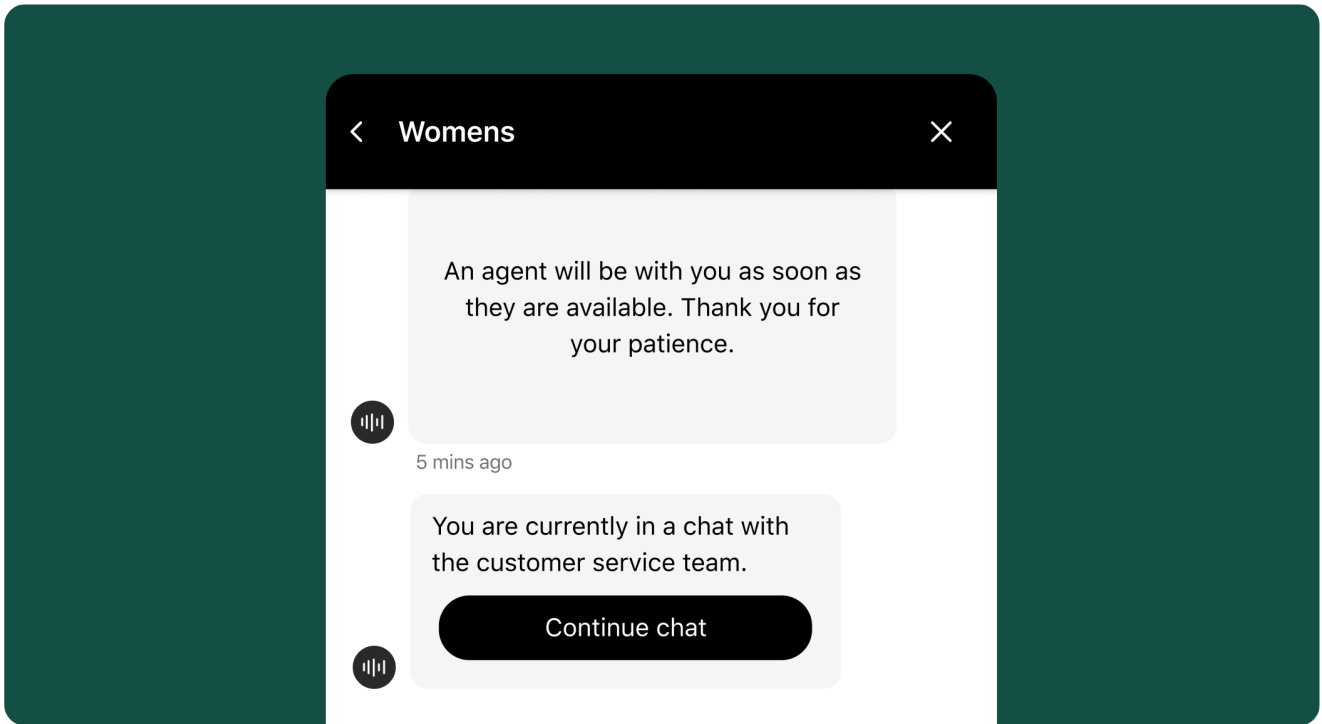
	See how the' Continue' button works 154MB
📎	Binary

Banning Visitors

If and when required, agents can ban shoppers from having chats with Customer Service teams. To do this, the Customer Service agent selects 'Ban Visitor' from the 'Actions' menu in the Zendesk Agent dashboard.

If a banned shopper tries to continue a previous Customer Service chat or start a new one from a Virtual Shopping chat, they will see a loading spinner on the screen with the text 'Sorry, we weren't able to connect you. Please try again later or visit our customer service page.'
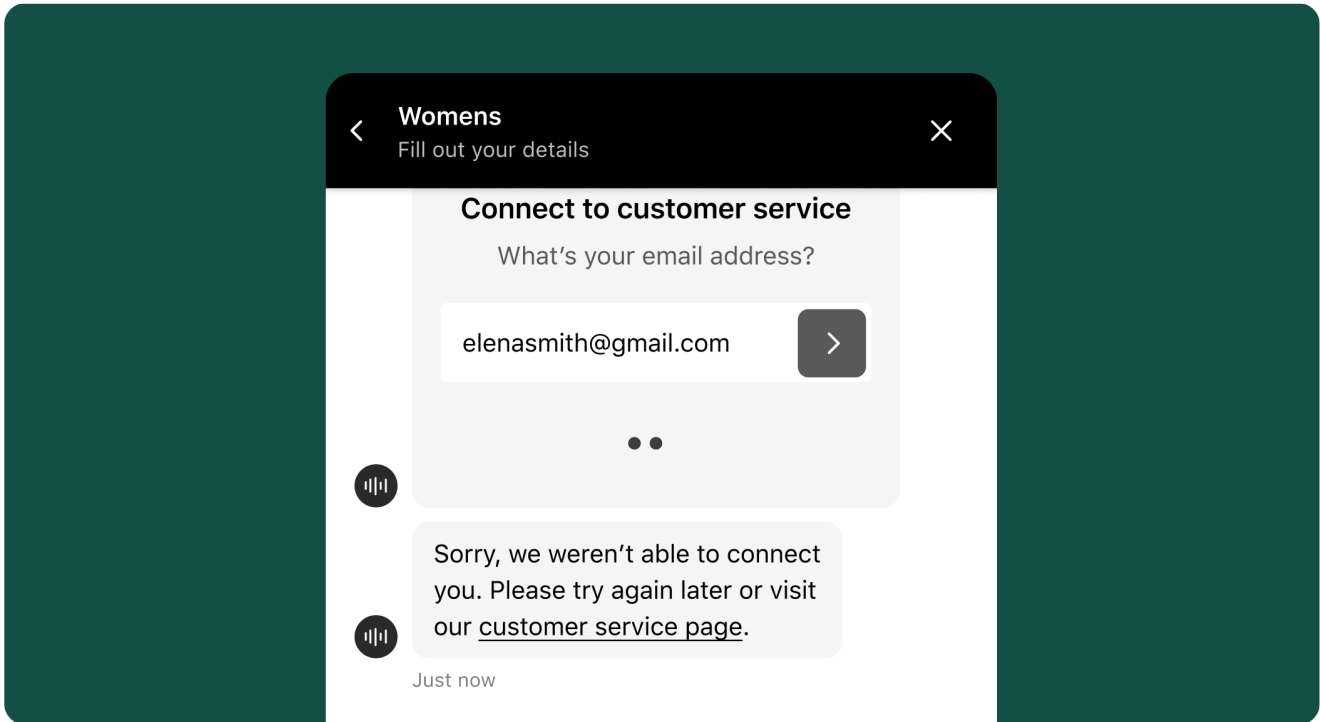
Zendesk timeout - reconnection

Zendesk chats can timeout if a shopper doesn't action features in the flow immediately. For example, if a shopper initially delays clicking on the 'leave a message' button to leave a message for a Customer Service team, but tries to do this again 20-30 minutes later, the chat button can be unresponsive as the Zendesk chat has timed out.

This is why we have added the means to reconnect to the Zendesk SDK in the background without the shopper needing to take any action. In this way, shoppers can complete the action when ready.

After a chat has been ended by a Customer Service agent, the shopper will receive the transcript of the chat to the email address they supplied and can respond to the Customer Service agent via email, or they can restart a new Customer Service chat from the Plugin.

Shoppers in multiple chats at the same time

Shoppers can start Customer Service chats with different teams at the same time. They can do this in an active chat by clicking on the chat header to the message inbox where they can click on the 'Start a new chat' button and then select 'Customer Service' from the Needs Selector.
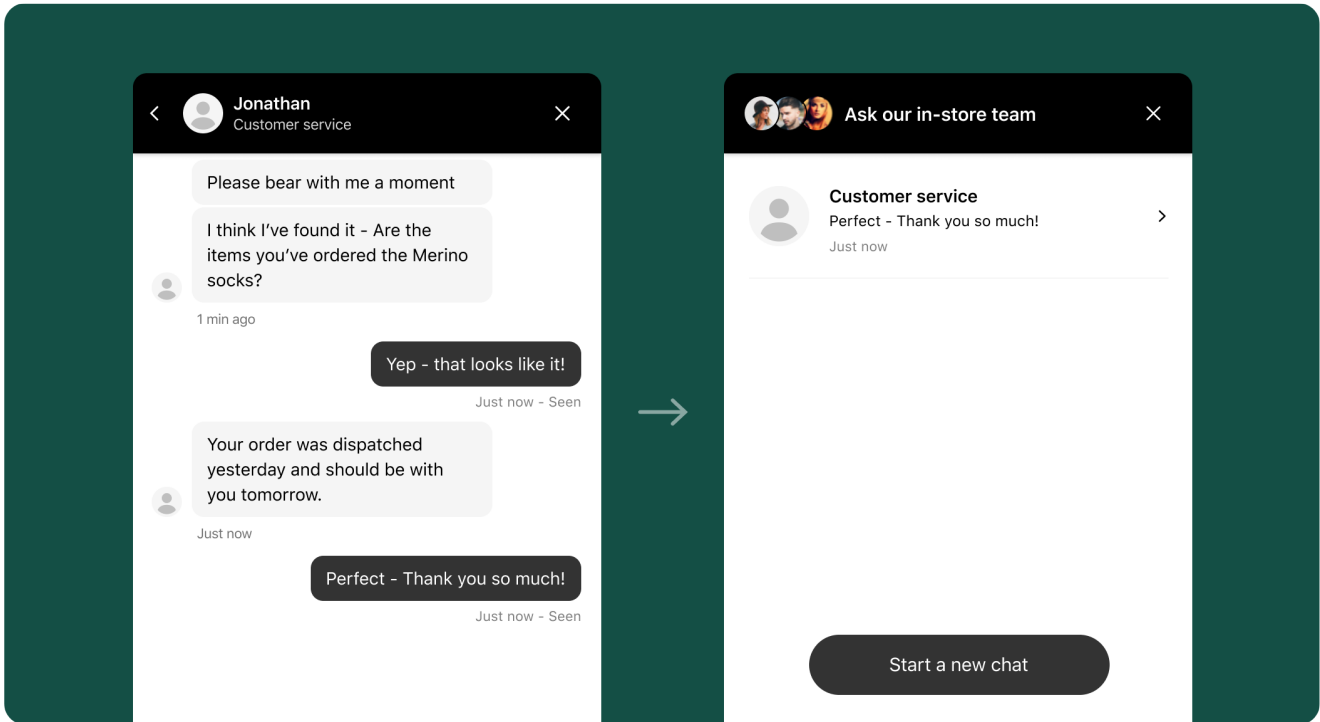
📎	Watch how shoppers can chat to multiple teams	107MB
	Binary	

Transfer to a new Customer Service agent or Department

From the 'Actions' menu in the Zendesk Agent dashboard, a Customer Service agent is able to select the option 'Invite Agent/transfer to Agent' to transfer or invite another customer agent to the chat to support the shopper. Similarly, they can select the option: 'Transfer to department' from the 'Actions' menu to transfer the shopper to a new Customer Service Department to support their enquiry.

The shopper is then informed in the chat when they have been transferred to a new agent or Department and when a new agent then joins the chat and the previous agent leaves the chat. On transferring a shopper, they may be held in a queue to speak to the new Department if the Department is busy.

1 min ago

Jonathan from the customer service team has left the chat

1 min ago

Thomas from the customer service team joined this chat

Just now
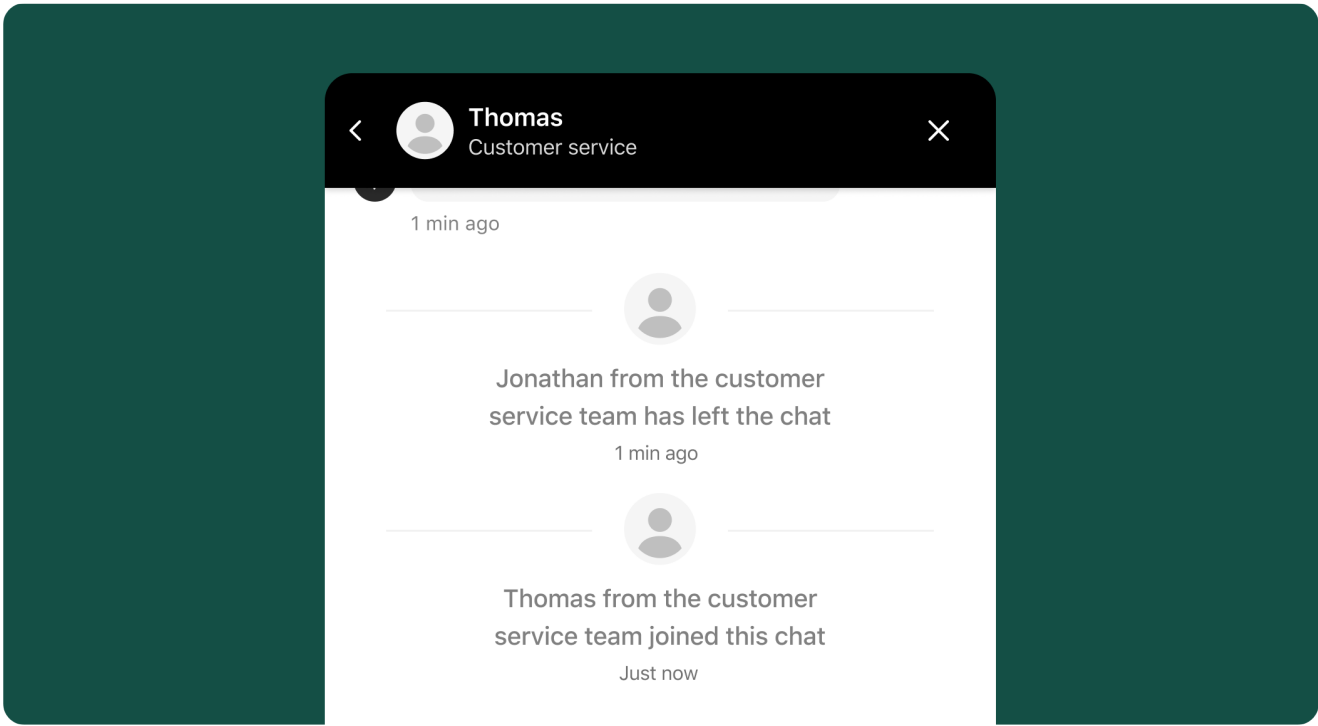
Watch how a chat is transferred   50MB
Binary

Frequently Asked Questions

What features are not currently available for the Virtual Shopping Zendesk integration?

Today, the Zendesk integration does not support the following:

- Customisation of Plugin text strings
- The ability for Zendesk Customer Services agents to redirect shoppers back to experts handling Virtual Shopping chats
- The ability for shoppers to add a comment back to the Customer Service agent after a chat has ended – however shoppers can leave a rating
- The ability to share video content between the shopper and Customer Service agent
- Passing conversation history to Customer Service teams: Zendesk does not allow for this
- Adding attachments to left messages when Customer Service teams are offline

How does the integration work? How do both tools connect?

The Zendesk Chat SDK seamlessly offers the Zendesk chat experience and feature set from within the same online chat.

If a shopper selects the Customer Service need from the Needs Selector within the Plugin or they are asked to be transferred by a product expert to Customer Services, a Customer Service form is displayed in the Virtual Shopping chat for the shopper to complete.

Within the form the shopper needs to provide their name and email address, then submit these details. On the form being submitted, the Zendesk Customer Service Team Selector is loaded into the Plugin to allow the shopper to select an individual Customer Service team that's relevant to their query. On choosing a Customer Service team, they will be connected to that team to begin a conversation.

To connect a merchant's instance of Zendesk to the Virtual Shopping Plugin, we need a merchant to submit their Zendesk ID and shared secret (a code used for authenticating users) as part of the activation process via the Dashboard which will allow us to connect to the correct Zendesk instance. You can activate the Zendesk integration via Settings in the Dashboard.

What's the experience when a Product Expert transfers a customer to Zendesk via the App and is there a chat queue?

At the point when a Product Expert transfers the shopper to Customer Services, the shopper will see the Zendesk Customer Service form displayed within the Plugin where they will need to supply their name and email address. On submitting the form the Customer Service Team selector will display and the shopper can select the Customer Service team that most suits their enquiry.

The shopper could be initially held in a queue if the Customer Service team is handling other conversations. The shopper is shown their position in the queue until the point they're connected to the Customer Service team.

What's the experience when a Customer Service agent receives a chat from a shopper?

When a new chat is raised by a shopper, this will be listed from the Zendesk Agent Dashboard under the Customer Service team the shopper has selected for their enquiry. A Customer Service agent can collect the chat from the Dashboard and reply in the normal way. They can also set up a profile for the shopper so they can be recognised next time they raise an enquiry. In this phase of the project only Customer Service agents can close chats, not shoppers, but if there is 20 minutes of no activity in a chat Zendesk automatically closes the chat and sends a shopper the chat transcript. The shopper always has the ability to continue the conversation via email if they want to.

A new shopper chat coming via a Virtual Shopping chat is recognised as we capture the Zendesk Account key provided by the merchant.

What's the experience when it's outside of business hours and a shopper clicks on the 'Customer Service' option in the needs selector?

When the Virtual Shopping chat is enabled out of hours on your website, if a Customer clicks on the 'Customer Service' Need from the Plugin they would first need to complete the Zendesk Customer Service form (supplying their name and email address) before the Zendesk Customer Service Team selector is presented. They would then select the Customer Service team they want to speak to. If all Agents within that Customer Service team are offline they would need to leave a message using the 'Left message' form.

The 'left message' then creates a ticket in Zendesk and is assigned to the Customer Service team the shopper selected. Someone from that team can then respond when next available.

📎	Watch how a shopper leaves an offline message 37MB Binary	

If a customer is transferred to Zendesk and provides an existing email address, will this link up with the existing customer profile in Zendesk?

Yes, for stored customer profiles, new tickets sit under their profile when raised with the same email address.

What languages are supported by the Zendesk integration?

Aside from English, the text strings used by the integration have been translated to French, German, Swedish, Danish, Dutch, Italian, Polish, Portuguese, Spanish, Norwegian Bokmal and Finnish.

Are we able to populate data for new customers within the Zendesk Agent Dashboard (including location, language, chat visitor path)?

Yes, all those fields are available for new Customers within the Zendesk Agent Dashboard.

Is there the ability for Customer Services to pass back shopper chats to product experts?

No, there won't be the ability for Zendesk Customer Service teams to pass customer chats back to Product Experts in this current phase of work.

Can shoppers access or start a separate product expert chat while speaking with a Customer Service team?

When in a chat with Customer Services a shopper can press the back button in the header of the Plugin to access their original chat with a product expert, but it won't be possible to re-start a new chat with a product expert until the Customer Service chat has ended. If the shopper does press the back button to return to their original chat, a 'Continue' button is displayed in the Plugin so they can be directed back to complete the Customer Service chat.

What file types can agents and shoppers send over a chat?

Customer Service agents and shoppers can share files within the messages they send to each other. Be aware Zendesk only allows the following file types to be supported:

- PDF (.pdf)
- PNG (.png)
- JPEG (.jpeg)
- GIF (.gif)
- Text (.txt)

Zendesk automatically converts all image types to PNGs when copying and pasting from the Agent dashboard directly into chats. Please note the size limit for files is 20MB and files are uploaded as links in a chat. Sharing of video files is not supported as Zendesk doesn't allow them to be shared within chats.

	See how image and video sharing works 98MB
📎	Binary

What reporting will be available for this integration?

Your Partnership Success Manager will have access to reporting, which they can share with you, showing the number of Shoppers transferred to Customer Services, which Customer Service teams are selected by shoppers, and things like the total ratings given for customer service chats.

If you have Google Analytics in place on your website, we can support the following events for the Zendesk integration:

- Web Widget Opened

- Web Widget Minimised

- Chat Opened

- Chat Served by Operator

- Chat Rating Bad

- Chat Rating Good

- Chat Request Form Submitted

- Chat Offline Message Sent

- Contact Form Shown

- Contact Form Submitted

In order to see these events firing from Google Analytics, you will need to import this GTM container config (containing the event related variables) into a new GTM workspace.

Ensure the tracking id value of the Google Analytics Settings imported variable points to your Google Analytics account.

Please note: the results from these events display from the 'Realtime > Events' section of the left hand navigation within Google Analytics.

If you want to be able to differentiate Zendesk events for this integration separately to your own Zendesk events within Google Analytics you can do this in the following way:

- Firstly, import the GTM container config referenced above into a new GTM workspace if you didn't already do this.

- You'll then need to add a new custom dimension field within your Google Analytics account.

- From the Admin section of your Google Analytics account click on the 'Custom Definitions' button then click on 'Custom Dimensions' and click on '+ New Custom Dimension' to add a new custom dimension field in your Google Analytics account.

- Give the new Custom Dimension the title 'Event Source' and please ensure the index is listed as '20' (only applicable if you have other custom dimensions created). You may need to create dummy Custom Dimensions in order to set an index at '20,' however these can always be used as real Custom Dimensions if required at a later point.

- Then when next testing the Zendesk integration, from the main navigation in Google Analytics go to the 'Behavior' > 'Events' section.

- Under the 'Secondary dimension' drop down menu, type in the word 'Source' in the search bar and under the 'Custom Dimensions' field click on the result 'Event Source.'

- Now you will see the 'Event Source' column display from the events table which will allow you to separately track Zendesk events driven through the integration.

- Events from our integration will contain the label 'Zendesk (via Klarna) Web Widget' from the 'Event Source' column to help you identify them.

Be aware events can take between 24-48 hours to display in the 'Behavior' > 'Events' section of Google Analytics.

Are there differences in the experience when agents are using the Chat Console vs. the Agent Workspace?

There are some slight differences to the shopper experience depending on whether an agent is using the Agent Workspace or the Zendesk Chat Console. The main difference is in how Ratings appear.

When an agent is using the Zendesk Chat Console, Ratings appear as usual. Rating information automatically displays to allow the Shopper to rate their chat once a Customer Service chat has ended.

When an agent is using Agent Workspace, Ratings do not appear automatically at the end of a chat. When the agent closes a chat, the connection is cut off, stopping Ratings from displaying. This is why we have removed Ratings from appearing automatically after a chat has ended.

Customer Service Agents can still surface Ratings to Shoppers manually, after or during a chat.

Messenger Integration

One place for Virtual Shopping and Messenger chats 🗣️
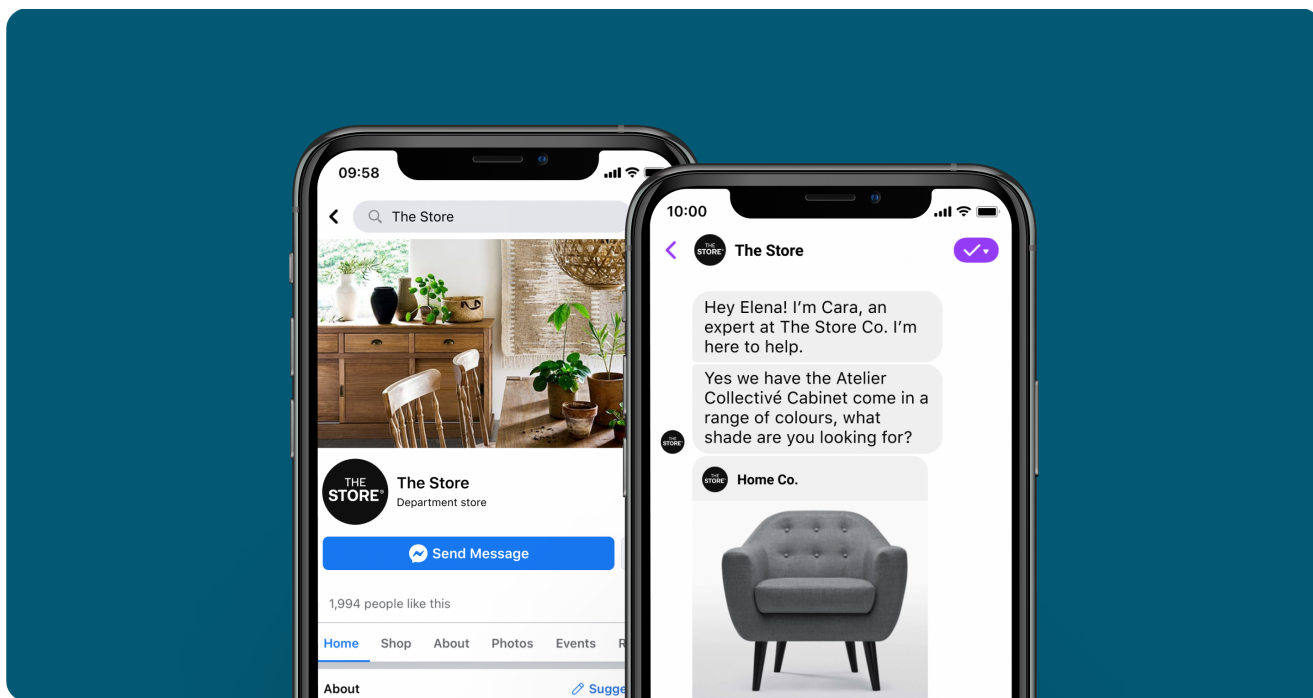
In this guide, you'll learn:

✅ How shoppers can start a Virtual Shopping chat via Messenger
✅ What the shopper experience looks and feels like
✅ Which features are available to shoppers within the Messenger chat

To get started, jump straight in:

📄 How shoppers start chats

📄 Activating your integration

📄 Frequently asked questions

How shoppers start chats

How shoppers can start a Messenger chat with Virtual Shopping

To start a Messenger chat, a shopper visits a Merchant's Facebook page and clicks on the 'Send Message' button at the top of the Facebook page, opening Messenger.

The shopper can then raise their query to the Merchant in the normal way through Messenger.

The shopper will then be presented with 2 menu options:

- '**Ask an Expert**' - If the shopper clicks on 'Ask an Expert' they will be routed to speak to a Product Expert using Virtual Shopping. As part of this flow the shopper is asked to provide the most relevant country and postal code for their query to be routed to. Note, for single country Retailers we don't ask the shopper which country they'd like to be routed to, just their postal code in order to route the shopper to their nearest store.
- **'Customer Service'** - If the shopper clicks on 'Customer Service', they will be routed to the Merchant's Facebook inbox or helpdesk.

	How you start a Messenger chat via a Merchant's facebook page.mp4 7MB
	Binary

Activating your integration

It's easy to switch on the Messenger Integration with Virtual Shopping.

Activating your Messenger integration

Before you begin set up of the Messenger integration please ensure the user with admin permissions for Settings is logged into the Dashboard and ensure you've been approved for the Messenger Integration. To do this simply send an email to help.virtualshopping@klarna.com including your name, role and company requesting access to the Messenger integration.

Once approved, please follow these steps to connect Virtual Shopping to your Messenger account(s):

> ⚠ Before activation, ensure the admin for the Messenger account you want to activate is logged in.

1. The Account Settings tab of the Dashboard, click on 'Integrations' at the top of the page
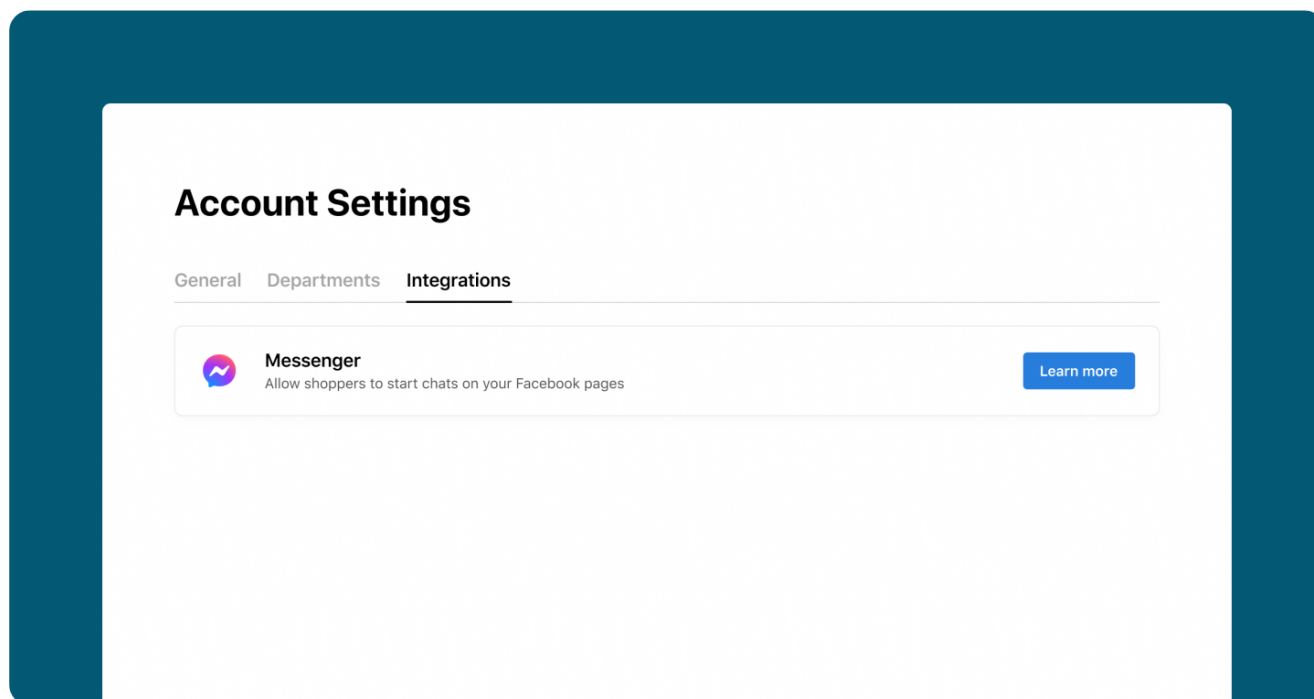
2. Click on the 'Learn More' button next to the module for the Messenger Integration

Learn more

3. Click on the 'Install' button to get started

Integrate with Messenger   ✕

Allow shoppers to seamlessly start chats on Facebook pages.

If you have multiple country accounts, you'll need to set up Messenger for each individually. Check the account on the Account Settings page to make sure you're setting up Messenger for the correct country before you continue.

Learn more

Cancel   **Install**
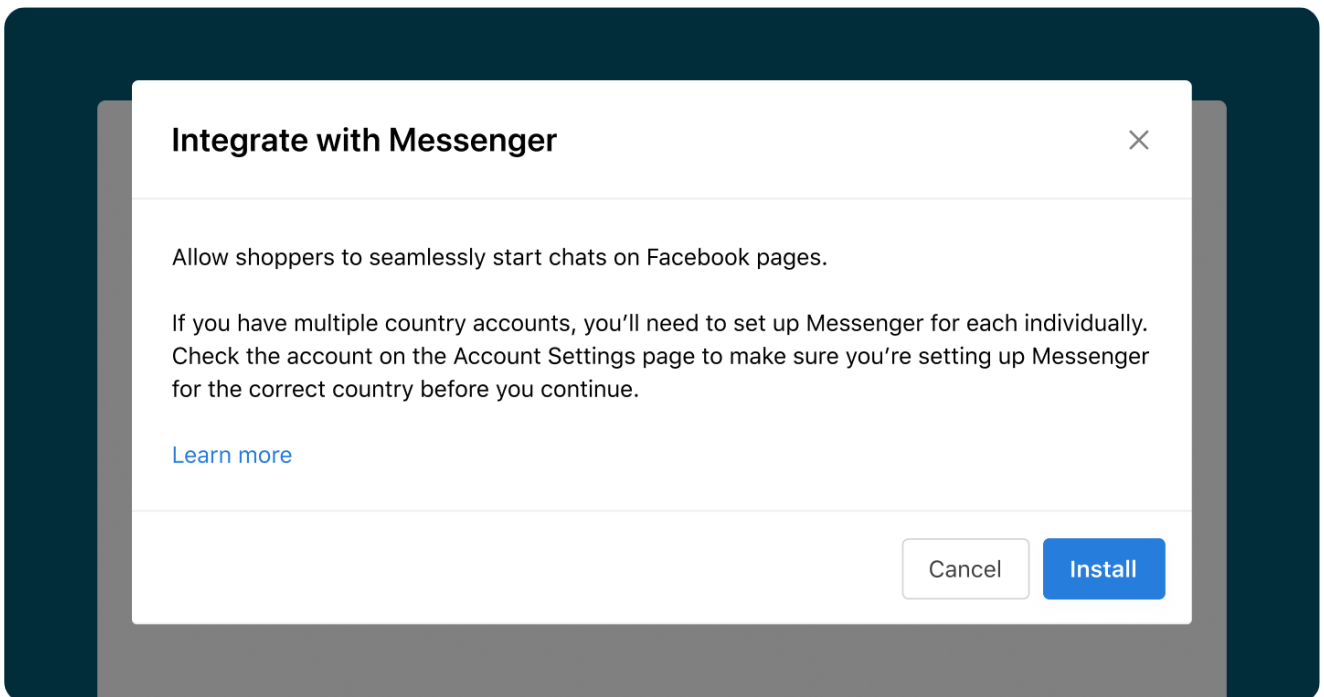
ⓘ If the Admin User for your Messenger account(s) isn't logged in at this stage, they will be prompted to login now.

4. Select which Facebook Page or Pages you would like to give access to Virtual Shopping
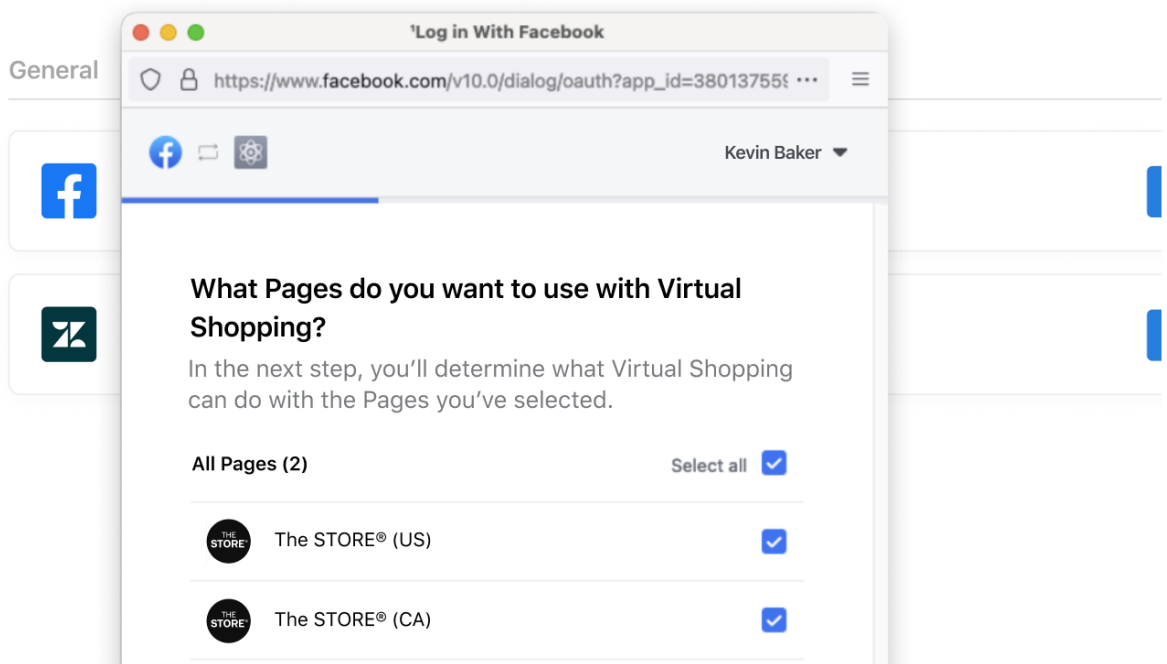
5. You will now be asked to give Virtual Shopping permissions to the following Messenger settings so you can set up correctly.

You will need to grant permission for Virtual Shopping to do the following:

- Manage and access Page conversations on Messenger
- Show a list of the Pages you manage
- Manage accounts, settings, and webhooks for a Page
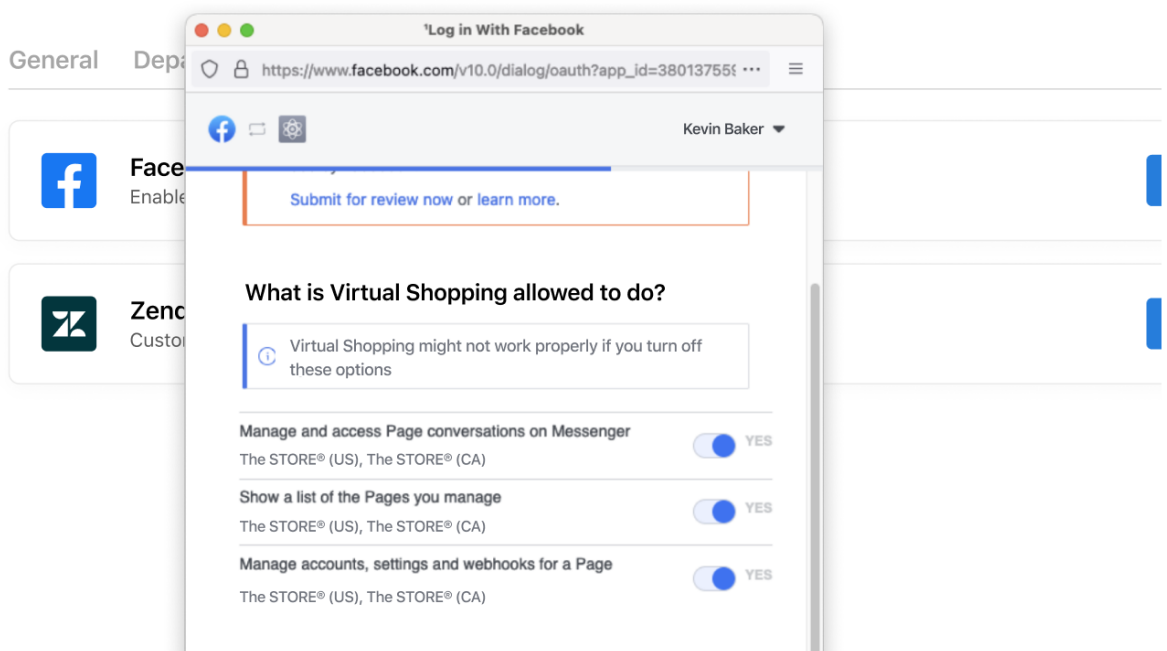
Choose 'Yes' for each setting and then 'Done.' You've now given Virtual Shopping permissions to be able to connect to your chosen Messenger account(s).

> ⚠ Please note if you do not accept all 3 permissions, Virtual Shopping might not work properly on your Messenger account.

6. From 'Connected Pages', you can confirm which pages you want to connect to Virtual Shopping. Choose 'Finish.' Your installation is complete.
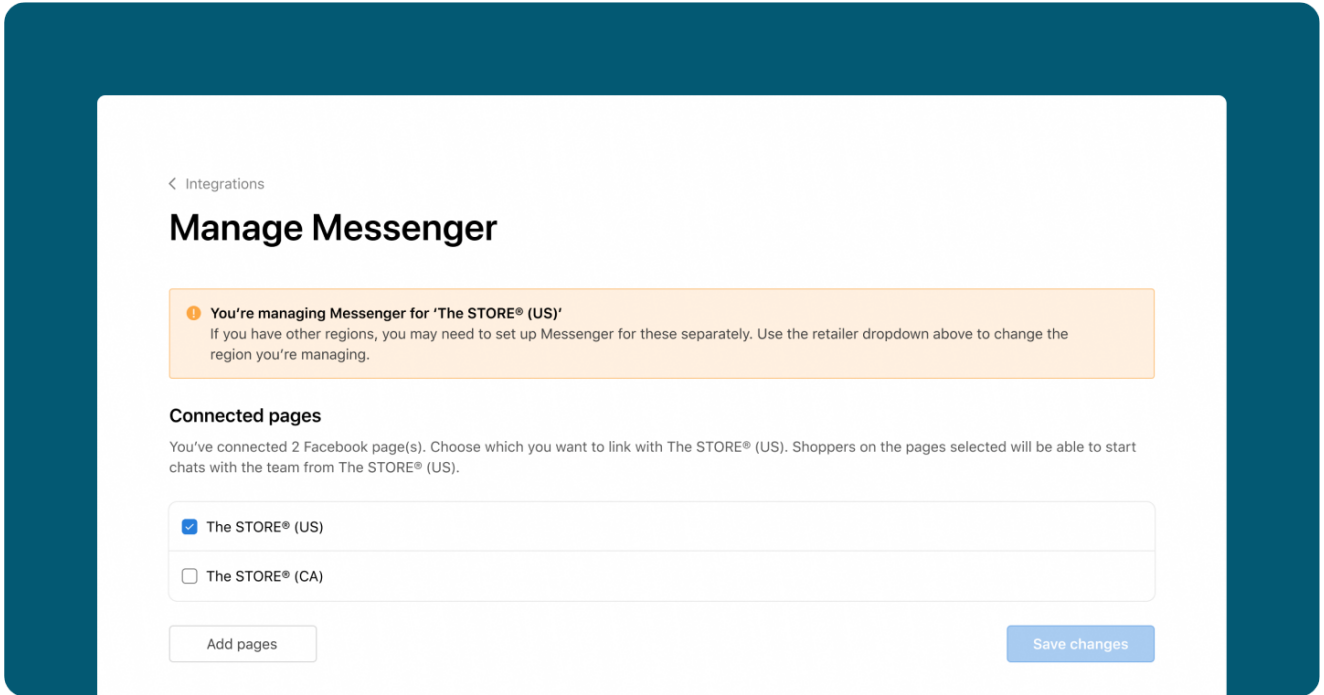
From the Integrations section of your Account Settings you will now see the module shows in 'Active' state.

Managing your integration

On the Integrations section of your Dashboard Account Setting, you can click the down arrow and select 'Manage' to see the current Facebook Pages you have connected to Virtual Shopping.

Account Settings

General   Departments   **Integrations**

| | **Messenger** | • Active | ⋮ |
| | Shoppers can currently start chats on your selected Facebook pages | | Manage |

If you no longer want Virtual Shopping to be connected to a Facebook page, you can deselect the Page here and click on 'Save changes.' In the same section, you can click on the 'Add pages' button to connect your Facebook Pages to Virtual Shopping.

> ⓘ If you would like to uninstall Virtual Shopping from your Facebook Page(s), please contact your Klarna Customer Success Manager, who can handle this request.

📎 Installing the Messenger integration.mov   43MB
Binary

📎 Deactivating the Messenger Integration.mov   7MB
Binary

📎 Reactivating the Messenger Integration.mov   7MB
Binary

Frequently asked questions

How does the integration work? How do both tools connect?

Virtual Shopping has integrated with Meta's Messenger API to support chats being started by shoppers from Merchant's Facebook pages. Product experts can accept chats started by shoppers over Messenger in the same way that they would normally through Virtual Shopping.

Merchants can connect their Facebook page to Virtual Shopping by following the self activation steps via Settings outlined here.

> ⚠ **Note:** Before activating the integration, ensure the Admin user for the Facebook Page(s) you want to activate is logged in.

The Virtual Shopping App needs to be configured as a 'Primary Receiver' after installation from the Facebook page settings, this url below has more details on how this is done.

The Facebook Inbox should be set as secondary receiver so Customer Service teams can answer queries from the Inbox: https://developers.facebook.com/docs/messenger-platform/handover-protocol/assign-app-roles

How do Product Experts know if the chat they're serving is coming via Facebook?

Product experts can see if a shopper is chatting via Facebook through the Facebook icon displayed from the bottom sheet when a chat is first claimed and also from the reference 'via Facebook' in the top left corner of the chat under the shopper's name.

What happens with chats started by shoppers when Product Experts or retail teams are unavailable?

If a Product Expert is unavailable or stores are closed at the time a chat is started, Virtual Shopping creates an automatic lead chat. This chat can be answered the next time a Product Expert is available in the app. The shopper is also informed that the chat will be served when a Product Expert is next available.

If a Product Expert declines the request to chat with a shopper what happens to the chat created from the Facebook page?

If the initial Product Expert who collects the chat declines the chat, we automatically create a lead chat that can then be picked up by any Product Expert when they're next available.

Is there a charge for this integration?

No, this integration is free and can be switched on via your Account Settings

What product features are in or out of scope of this integration?

As with other Virtual Shopping chats started from your website, Product Experts can send text, photos, calendar invites and product cards to shoppers via Messenger chats.

At the current time our video calling and Contacts features are not available as part of this integration. The integration is only available in English and there's no ability to customize text strings.

Please be aware that chats with shoppers may take place over a longer timeframe as shoppers may leave Facebook and return to the page at a later point.

Does this integration work on Desktop and Mobile web?

Yes, the integration works on Desktop and Mobile web (wherever Messenger is supported).

How can we track sales from chats started via the Facebook integration?

As the original chat starts from the Facebook page, please be aware that Virtual Shopping can only start tracking Shopper Events and attributing against product purchases once shoppers follow a Product Card to a Merchant's website where the conversation is then generated in line with the normal Virtual Shopping experience. If the shopper makes a purchase from your website the Product Expert will be credited with the sale in line with your usual sales attribution and we can report on this.

How can you determine a user's location to route them to their closest Store?

Before a shopper's chat is served we actively ask them which country and postal code they would like their query to be routed to and then connect them to their nearest active Store for a Product Expert to respond to them.

What reporting will be available for this integration?

Reporting of chats generated via the Messenger integration can be seen from the 'Facebook Messenger Chats' column of the 'Data Export' report downloaded via Dashboard.

Please note, the number of chats in the 'Chats' column of the 'Data Export' report is the total number of Virtual Shopping chats generated and includes chats from the Messenger integration within that total.

Your Klarna Customer Success Manager will also have access to further reporting, which they can share with you, showing how many Shoppers selected to speak to a Product Expert or chose to be routed to Customer Services and the percentage of Messenger chats claimed.

Notifications

Here, we cover details related to notifications your team receives from Dashboard for various actions surrounding Manage Team, such as when a new team member joins and needs approving to start using the Store App.
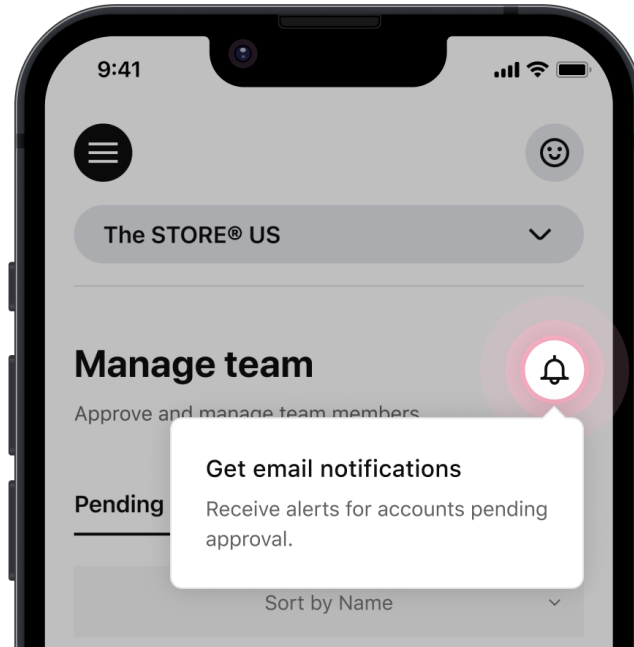
Manage Team email notifications

How to set up Manage Team email notifications

Frequently asked questions

Manage Team email notifications

Be informed when product experts register in the Store App.

The Manage Team email notifications feature informs merchant teams when their product experts register in the Virtual Shopping Store App, allowing them to start serving customer chats quicker.

Currently, when a product expert registers for a Store App account, there is nothing to inform merchant teams that they've registered and now require approval. If product experts don't get quick approval for use of the Store App, they are not able to serve customer chats and generate sales.

Email notifications will let merchant teams know how many product experts are pending approval, and give them a direct link to the Manage Team section of Dashboard in order to grant quick approval.

Goals of this feature:

  To speed up product expert onboarding

  To get your team live, quicker

 Meet shopper demand for maximum opportunity

How to set up Manage Team email notifications

How to register for email notifications

It's easy to activate Manage Team email notifications. To get started, follow these simple steps:It's easy to activate Manage Team email notifications. To get started, follow these simple steps:
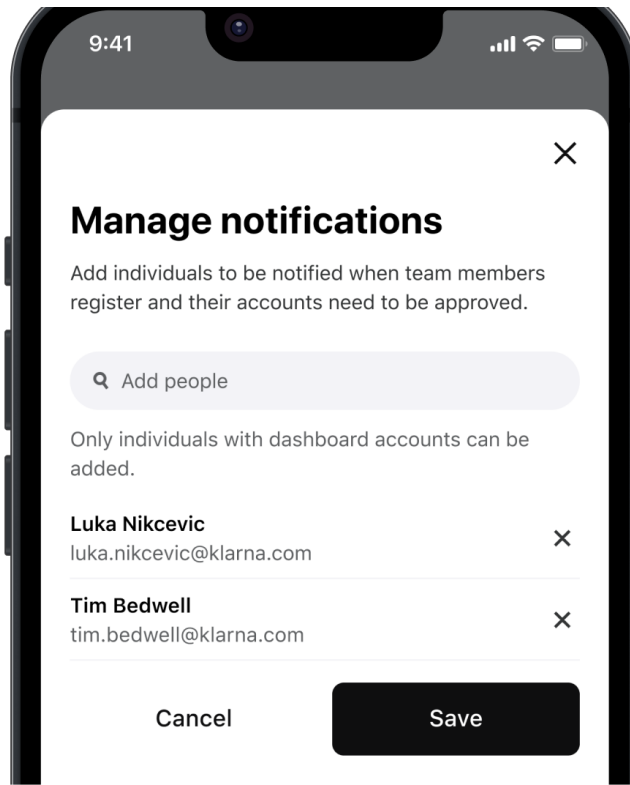
Step 1

From the Manage Team section of the Dashboard, click on the 'Bell' icon to set up email notifications.
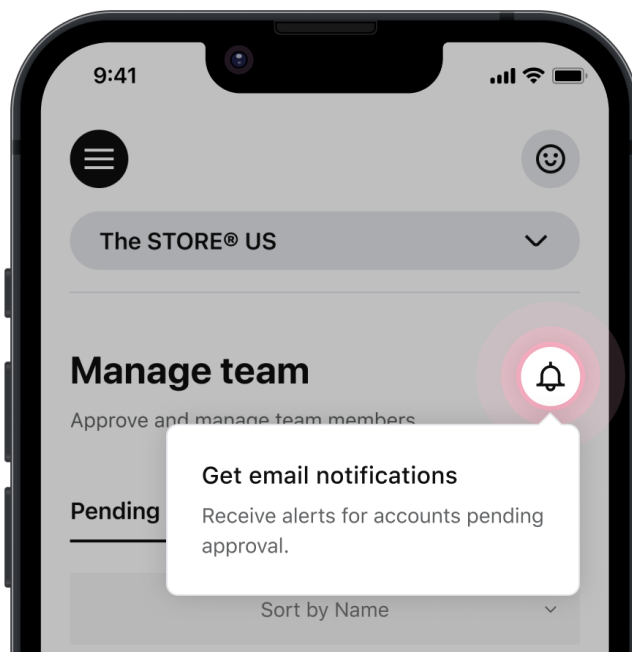
Step 2

Search for a Dashboard user that has access to the Manage Team section of Dashboard, and add them to receive email notifications. Then click 'Save'.
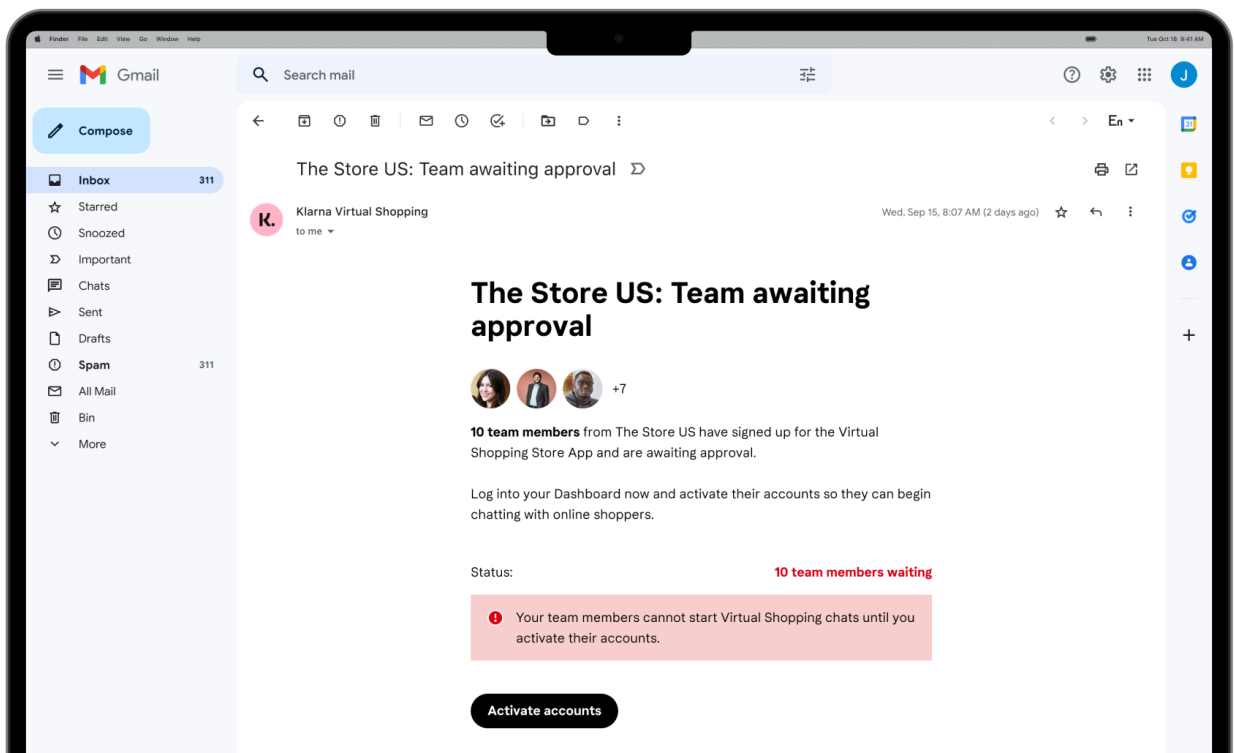
Step 3

You're now ready to start receiving email notifications when there are pending Product Expert Store App accounts to be approved. Email notifications are sent every 48 hours at 10:00 UTC.

From any email notifications received, simply click on the 'Activate accounts' button to approve Product Experts for use of the Virtual Shopping Store App.

Email notifications_example User journey.mov   35MB

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Frequently asked questions

How can I sign up for Manage Team email notifications?

From the right-hand side of the Manage Team section of your Dashboard you will see a bell icon. Click the bell icon to display a 'Manage Notifications' modal window. From this window, you can search for Dashboard users with Manage Team access to sign them up for email notifications.

How frequently will I be sent Manage Team email notifications?

Once signed up for email notifications you will receive one email every 48 hours if there are pending product experts that require approval for the Virtual Shopping Store App. If there are no product experts pending approval, no email notifications will be sent.

Email notifications will be sent at 10:00 UTC.

What information will email notifications contain?

Email notifications will indicate how many product experts are pending approval. A link from the email received will take the user straight to the 'Manage Team' section of the Dashboard so any product experts can be approved to use the Virtual Shopping Store App.

Can I sign anyone up for Manage Team email notifications?

You will only be able to sign up users with a Dashboard account that already have access to the Manage Team section of the Dashboard.

All emails sent will come from the email address: no-reply.virtualshopping@klarna.com

How do I unsubscribe from Manage Team email notifications?

You can click on the unsubscribe link from any email notification you receive to stop receiving further email notifications.

Will a Dashboard user still receive notifications if their account has been deactivated?

No, if a Dashboard user's account is deactivated, we automatically remove them from the subscription list for email notifications.

Am I able to change how frequently I receive email notifications?

No, currently all email notifications will be sent at 10:00 UTC.