

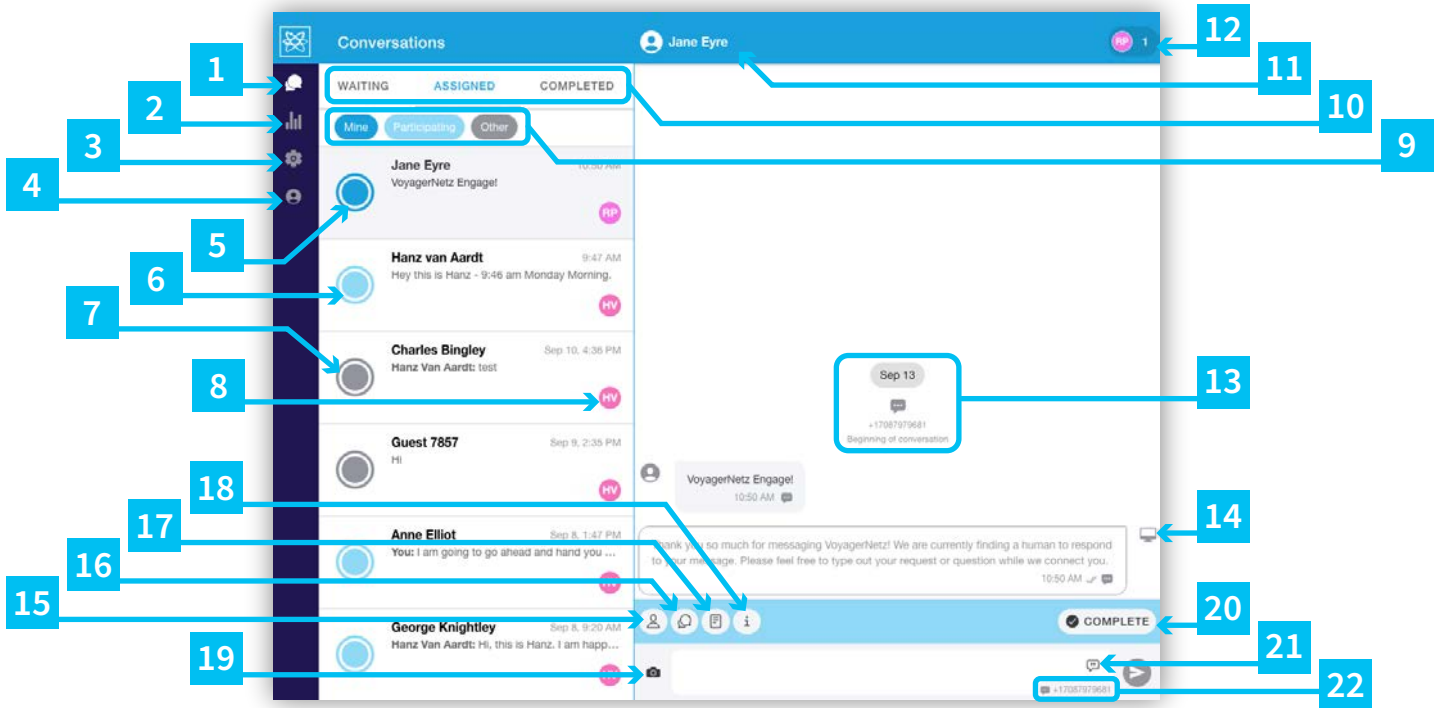
voyagernetz



engage

Getting Started Manual

User Interface Content:



- 1 This icon represents and leads to the **Conversations** Section, which is the full section you are looking at within this screen. It is the main interface that every user will utilize in communicating with Customers. Items 5-22 are in reference to this section.
- 2 This icon represents the **Dashboard** Section, which is the section represented in the second screen displayed (as seen on page 5). The Dashboards are an easy way for Admins to see at a glance the breakdown of the conversations within their teams. Items 23-26 are in reference to this section.
- 3 This icon represents the **Admin** Section, which is the section represented in the third screen displayed (as seen on page 6). This Admin section is only available to the Admins within the team and is the portal for the functionality and customizable elements of a particular instance of Engage. Items 27-36 are in reference to this section.
- 4 This icon represents the **Profile** Section, which is the section represented in the fourth screen displayed (as seen on page 9). This section allows for basic user functionality. Items 37-40 are in reference to this section.

5

The dark blue icon represents conversations that are **Mine**. These are conversations that the current user owns, and can interact with the customers on. This visual representation allows for easy viewing.

6

The light blue icon represents conversations where the current user is **Participating**. These are conversations where you cannot directly interact with the customer, but you will be notified when there is activity and can participate in the Internal Chat and Notes, and alter Conversation Info and Contact Info. You also must be a participant in order to have the conversation transferred to you.

7

The gray icon represents conversations under the heading of **Other**. These are conversations that the user neither owns nor is participating in. The Other category is for supervisory purposes, and is only available to Administrators and Supervisors. Standard Users will not see any gray icons. For these conversations, the user will not receive any notifications. If the user is an Admin or Supervisor, they can force their participation by clicking the below Participate Button, that is available within Other Conversations.



8

These small icons represent the initials of the owner of the conversation so that a user can quickly see which teammate is in control without having to enter the conversation itself.

9

This is the **Filter System** that allows the user to adjust their inbox. By selecting and deselecting the “Mine” “Participating” and “Other” Boxes, they will filter their inbox accordingly. This is just for ease of use, and does not affect notifications.

10

These are the 3 categories that any conversation can fall into for a particular user:

Waiting: Conversations that have not been assigned or claimed yet, and are available to all users within the team to do so.

Assigned: Conversations that are assigned to individuals and fall in the 3 categories as explained in items 5-7. This is where users will be the majority of the time.

Completed: Conversations that have been completed by their owners. All data is saved within this category but can no longer be interacted with, with the exception of changes to “Conversation Info” and “Contact info”.

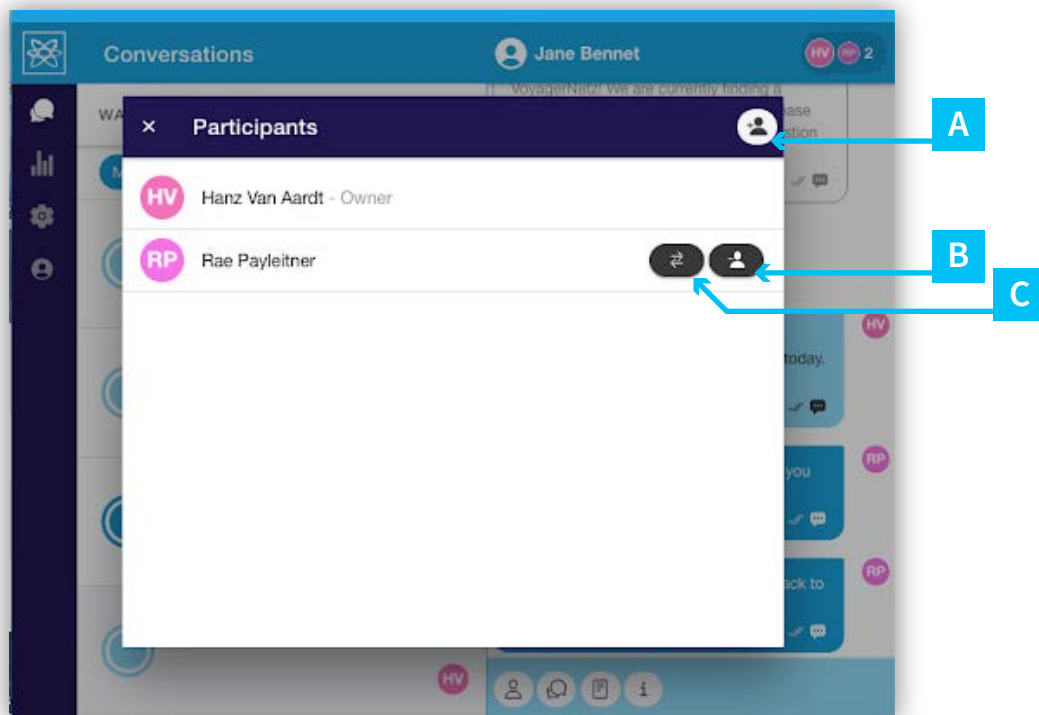
11

Here you can see the name attached to the conversation. If it is a first time SMS messenger, this will initially show the phone number, but the name can manually be added in the “Contact Info” Section, which can be found when you click this name or the icon attached to item 15. Facebook messages will automatically pull the name and avatar from the facebook profile

12

This is the entry point for the “Participants” Section. At a glance you can see how many users are currently participating in the conversation. By clicking on it you will get the window below, and be able to see the list of participants. By clicking on:

- A. You can **Add a Participant** from the list of users. They will be notified that they were added.
- B. You can **Remove** the individual from the conversation.
- C. You can **Transfer** the conversation to the individual. They will have to accept the conversation transfer, before it switches ownership.



13

At the beginning of every conversation, you will see the starting date along with the channel it enters in. In this instance it starts with an SMS channel at the number: +17087979681. In the instance where you have multiple phone numbers attached to one Engage, this allows you to see which channel it belongs to. This is also the case for all social media channels, as you can see below an example of how it shows facebook as the media and the particular page it belongs to as “VoyagerNetz”. These are available prior to accepting a conversation in the Waiting Section as well.

Sep 14



VoyagerNetz

Beginning of conversation

14

This icon indicates that the message was an automated response. It originated from the system, as opposed to an individual user, so it is grayed out, and has this system icon.

15

This Icon accesses the **Contact Info** which is also accessed by Item #11. In this section you can change the name of the contact, see their respective channel information, add a Contact Reference if desired, and take any notes on the Contact itself. All of this data is saved to the Contact, and will be accessed again, should they message in at another time after this particular conversation is completed.

16

This icon accesses the **Internal Chat**. This is where participants in the conversation can discuss the conversation, without the contact being aware. This allows for collaboration and coaching on a higher level surrounding the customer interaction. All participants will be notified of new internal chats with the icon on the conversation itself and a push notification.

17

This icon accesses the **Conversation Notes**. This is where participants in the conversation can take any notes they want, concerning the conversation, without the contact being aware. This allows for collaboration and record keeping. All participants can access these notes.

18

This Icon accesses the **Conversation Info**. In this section you can see the conversations' respective channel information, add a Conversation Reference if desired, see the created date and time, and once it is complete see the Outcome data.

19

This icon allows you to access the **camera and photo** collection on either your mobile device or desktop if it is available, in order to send pictures to the contact.

20

By selecting the **Complete icon**, the owning user will complete the conversation and essentially close it to further interaction. At this point the owner will be prompted to select an outcome which will categorize the conversation. Outcomes can be accessed through Item #29

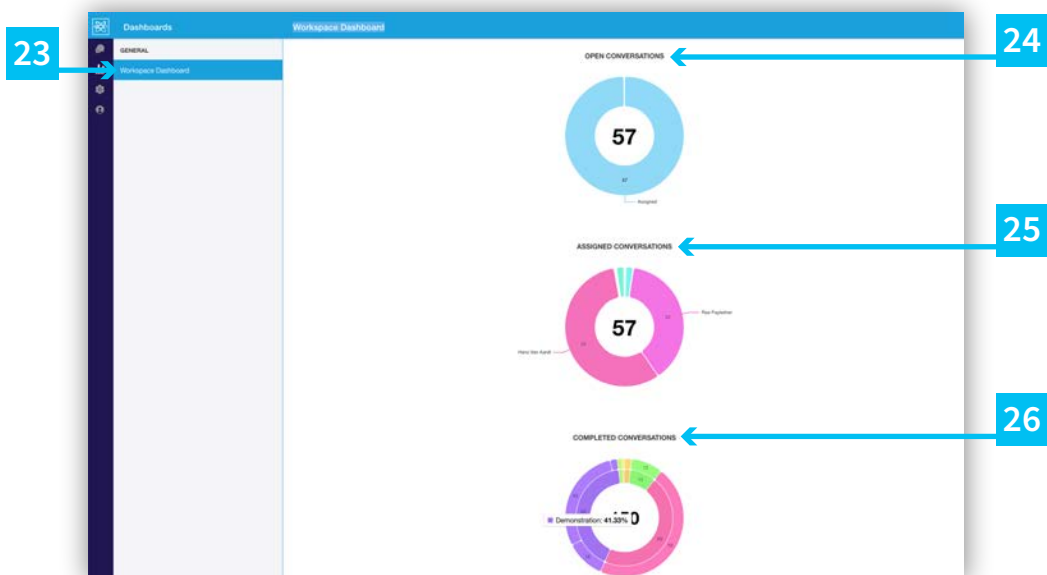
21

This icon accesses the **Standard Responses** which can be added to the Engage instance through Item #30. This populates your message field with the standard response with just a couple clicks and allows for custom additions prior to sending.

22

This element shows you the channel that you are sending from. It will show you the type of channel, in this instance SMS, and the number or appropriate page within that channel.

Dashboards:



23

Administrators will have access to the **Workplace Dashboard** in order to be able to quickly see the current breakdown of active conversations, and the categorization of Completed Conversations.

24

Open Conversations include all conversations in Waiting and Assigned for the Team. It will show you how many of each. In this example there are 0 conversations in Waiting, and 57 in Assigned.

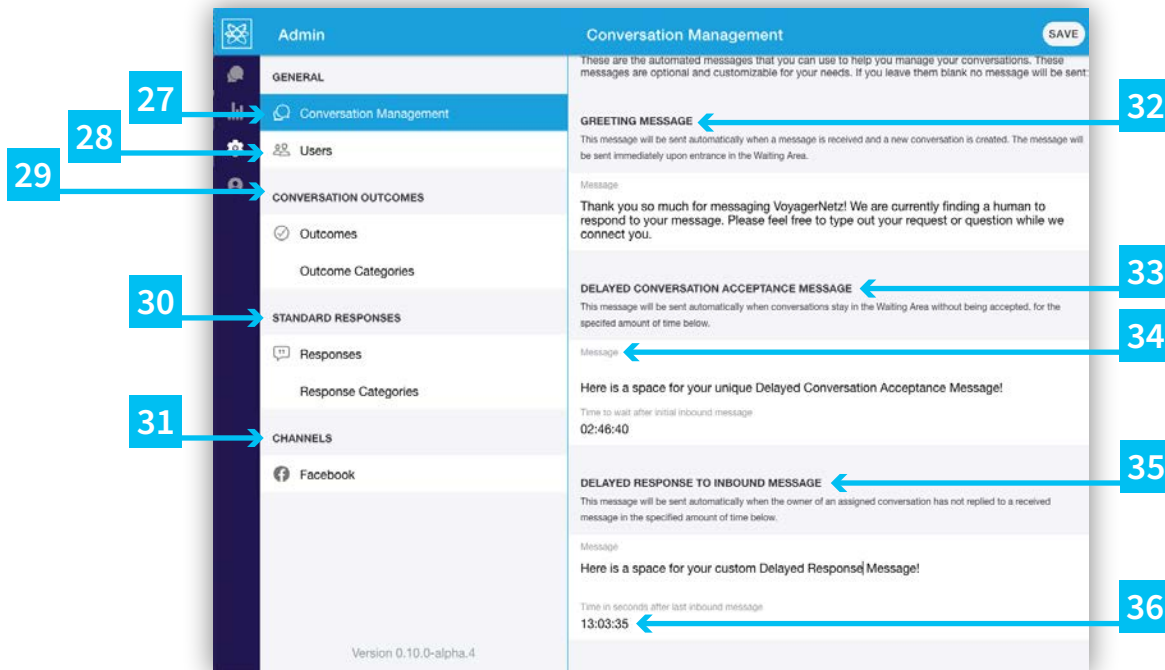
25

Assigned Conversations shows you the breakdown of ownership of the Assigned Conversations.

26

Completed Conversations shows you the breakdown of all completed conversations, first by Outcome Category (the inner circle) and then by specific Outcome (the outer circle). You can hover over or click the section see the outcome/category and the percentage.

Admin:



27

Within the Admin Section is the **Conversation Management Section** which includes Items 32-36. This section organizes the Automated Responses for the Engage instance. These are fully customizable and optional messages. If you leave a message space empty, that particular option will go unused.

28

This leads you to the **User Section**, where you can add new users or alter existing ones as needed. For new users you will create a password that they can change once they sign in, but you always, as an Admin, have the ability to force change the password or turn off a particular user's ability to sign in.

29

These two sections organize and create the **Outcomes**. You can create new categories and specific outcomes by clicking that respective section and selecting the "+" in the top right and customizing them as you see fit. These outcomes are easy ways to organize closed conversations by type, whether they are successful or not, and follow up needs. You can use these in any way you like, and they will influence the Dashboard in the Item #2.

30

These two sections organize and create the **Standard Responses**. You can create new categories and specific responses by clicking that respective section and selecting the "+" in the top right and customizing them as you see fit. Standard Responses are canned messages that allow you to be more efficient and effective with your time by prewriting messages. These messages can be used in two ways. By selecting the icon in Item #21 and entering them in the flow of a conversation as a user, or by attaching a "Tag" to them, which opens an extension.

For example, if I set us a Standard Response with the tag: #faq, in the body of that message I can put a series of frequently asked questions, and then I can promote that tag as an extension. Then when a customer messages in #faq to one of your Engage channels, they will automatically receive the information in that message and a conversation will open up in Waiting, for any follow up. This functionality can be used for promotions (#christmasspecial) or self help (#pricing) or any number of other applications. All customizable to you.

31

The **Channel** section is where you can link your existing messaging accounts to your Engage Instance. You must be an Admin, both in Engage and in the channel Account in order to connect the two.

32

The **Greeting Message**: This message will be sent automatically when a message is received and a new conversation is created. The message will be sent immediately upon entrance in the Waiting Area.

33

The **Delayed Conversation Acceptance Message**: This message will be sent automatically when conversations stay in the Waiting Area without being accepted, for the specified amount of time in Item #36.

34

This is area for the message as described in #33. If you would like to forgo using this automated message, simply leave this area blank.

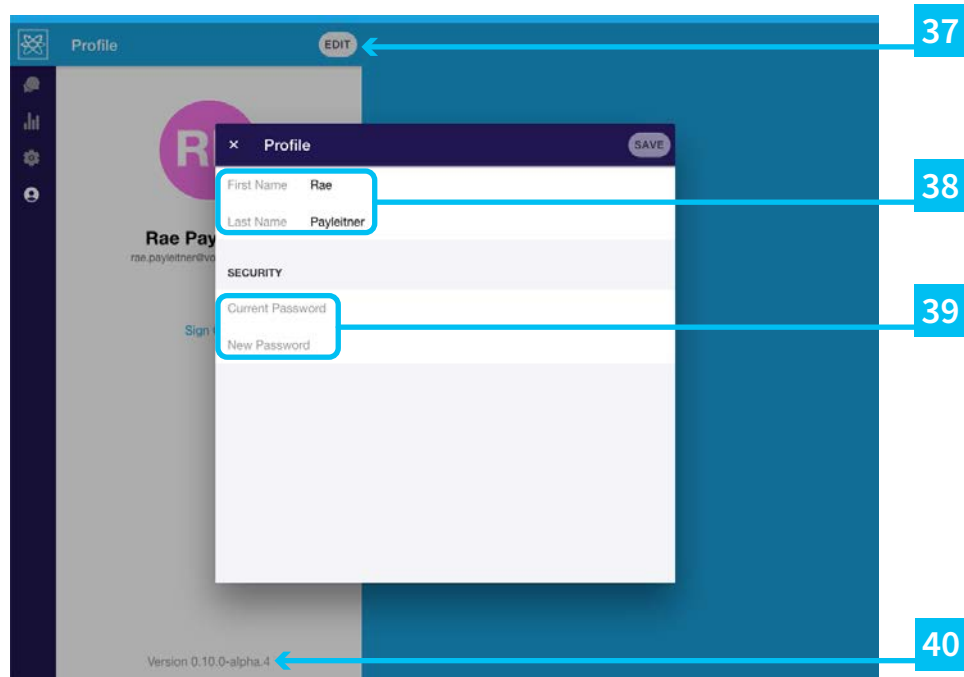
35

The **Delayed Response to Inbound Message**: This message will be sent automatically when the owner of an assigned conversation has not replied to a received message in a specified amount of time. The Message block and timer for this message works the same as items #34 and #36.

36

This is the timer for the message described in #33 and #34. It is organized as Hours:Minutes:Seconds. Once this amount of time is reached, without acceptance in the Waiting Area, this message will be sent. This timer can be customized.

Profile:



37

The Profile account is used to manage an individual user's settings and sign out if needed. In order to Edit the user click this **Edit** button.

38

Within the Edit Section users can change their name as it appears in Engage. This should be a name that teammates will recognize for ease of use. It will also be reflected in the initials across the system.

39

A user can change their password in this section for safety and security. You must enter your current password to be able to change it.

40

On the bottom of the profile account, you can see your version number for VoyagerNetz Engage, so that you can know what blogs to read and whether or not you want to upgrade.

How to:

In this section we explore some basic walk throughs to jump start your use of **VoyagerNetz Engage**

How to Sign In:


In your **VoyagerNetz Engage Deployment** email you will have received your Engage Instance Name and your Engage Link (www.engage.instancename.voyagernetz.us).

- ➔ To sign in via a browser go to the Engage Link, Type in User Name (Email) and Password.
- ➔ To sign in Via Mobile App, download the “VoyagerNetz Engage” app from the iOS App Store or Google Play Store. Type in your instance name, User Name (Email) and Password.

How to Add a New User:


1. Under the **Admin** section in Engage (Gear Icon, second from the top on the left hand side for desktop and second from the left on the bottom for mobile) Select **Users**.
2. Click + in the top right corner
3. Enter their First Name, Last Name, and Email (which will be their user name)
4. Type and Confirm a Password for them to start with. They will have the ability to change it once they log in for the first time.
5. Select their Role. User (basic functionality) Supervisor (Basic Functionality, plus the ability to see all conversations through the Other Functionality) or Admin (Complete Functionality, including adding users, dashboards, the Admin Section, etc.)
6. Click **Save**
7. Send the above “How to Sign In” guide with your Engage Link, along with the Email/User Name and the Password you just created.

How to Change Your Password:

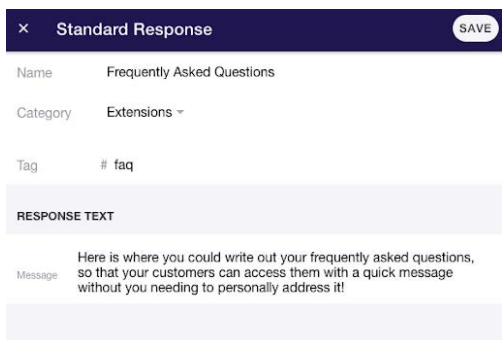
Under the Profile Section , you can select the Edit Button, to change your personal information, including your password. You must input your original password, select a new one, and click save.

How to setup automated responses:

A great first step in exploring the functionality of your VoyagerNetz Engage Instance, is to add an **Automated Greeting Message**. This is a message that will be sent automatically when a new customer message is received and a new conversation is created. The message will be sent immediately upon entrance in the Waiting Area. This allows you to set the tone right away with your customer and share important information. You can use this to share your hours, links, encouraging them to share their needs, and however you want to greet your customers!

This Greeting Message along with other more advanced automated messaging options can be found, within the **Admin Section** , underneath **Conversation Management**.

How to create an #extension type Standard Response:



The screenshot shows a 'Standard Response' configuration form. At the top, there is a dark blue header with a close button (X) on the left and a 'SAVE' button on the right. Below the header, the form contains several fields: 'Name' with the value 'Frequently Asked Questions', 'Category' with a dropdown menu showing 'Extensions', and 'Tag' with the value '#faq'. Below these fields is a section titled 'RESPONSE TEXT' with a light blue background. Inside this section, there is a 'Message' field containing the text: 'Here is where you could write out your frequently asked questions, so that your customers can access them with a quick message without you needing to personally address it!'.

You can utilize our #extension functionality which lives in our Standard Response section within the Admin Section. This allows you to connect a Standard Response with an extension style hashtag, opening the door to automated messaging which can share vital information to your customers/clients immediately.

For example, you could use the tag: #faq, and in the body of that message you could put a series of frequently asked questions, and then you could promote that tag as an extension. Then when a customer messages in #faq to one of your Engage channels, they will automatically receive the information in that message and a conversation will open up in Waiting, for any follow up. This functionality can be used for promotions (#christmasspecial) or self help (#pricing) or any number of other applications. All customizable to you.

How to connect a facebook page:

Connecting your business' facebook page to your Engage takes just a few moments. The important thing to understand first, is that you must be an Admin within Engage and an Admin on the facebook page to connect the two.

1. Under the **Admin** section in Engage
2. Select **Facebook** under **Channels**.
3. Click **Link** in the top right corner
4. SignIn to Your Facebook
5. Under Settings, select the pages you would like associated to Engage, and click Continue.
6. Under **Link Facebook Pages**, select the boxes next to page you would like to link to Engage and click "Link" in the top right.
7. The Channel will read as "Pending" for a few moments, and then it will switch to "Active" and your facebook page will now be directly linked to Engage!

How to setup a QR Code to initiate text conversations:

Check out this blog written by our President, Hanz van Aardt entitled, [Make it easy for customers to message you through a QR Code](#) to learn some easy work arounds and best practices surrounding QR Codes.

How to setup a Click to Text button on your website:

Check out this blog written by our President, Hanz van Aardt entitled, [Why and how to add a click to text button to your site](#), to get a step by step guide in setting up this important element on your website.

How to add Facebook Chat to your website:

Adding your facebook chat to your website and opening the Guest Chat functionality to your website only takes a few minutes! You must be an Admin on your Business Facebook Page in order to get the needed information. Please see this [step by step guide](#) on how to pull that information from your facebook page and link it into your website. Once that is complete, and your facebook page is linked in Engage through the Admin Page, the webchat will feed directly into Engage.



We are here to help!

Message us at 708.797.9681 with any questions, to set up training, or more info.

For a Video Training of this Information go to
www.voyagernetz/engage or email
engage@voyagernetz.com

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