

Facilitate Sales

To configure a Widget to generate a one-on-one video call to a sales rep or product specialist

1. Sign in at <https://widget.magnifi.io/> and select **Settings / User Management** from the left Navigation column. This is where you will add Users who are authorized to answer incoming calls
2. Click on **+New Staff** button, and fill out the form.
 - a. Assign the person an initial password so they can sign in. They will be able to change this later.
 - b. Checkmark the option to “Email Credentials” to the person.
 - c. Click Save. Repeat for each person who is authorized to answer an incoming video call.
3. Create a New Widget configuration by clicking on **Widget Management** in the left navigation column and clicking on the **+New Widget** button

The screenshot shows the 'New Widget' configuration form with several red annotations:

- Name your Widget configuration**: Points to the 'WIDGET NAME' input field.
- Select CALL functionality**: Points to the checked checkbox for 'Call - Make inbound call requests'.
- Type and select the people who are authorized to answer this video call**: Points to the 'MANAGERS WHO CAN USE THIS WIDGET' input field.
- Adjust lobby/meeting background colour**: Points to the 'LOBBY BACKGROUND COLOUR' color picker.
- Change the display icon**: Points to the 'Change' button next to the 'ICON'.

The form includes sections for 'WIDGET NAME', 'ROOM TYPE', 'WIDGET FUNCTIONALITY', 'MANAGERS WHO CAN USE THIS WIDGET', 'Settings' (with 'ICON' and 'LOBBY BACKGROUND COLOUR'), 'Share Meeting Links' (with 'MESSAGE WHEN SHARING' and a preview), and 'RECORD' and 'PROVIDE DIAL IN NUMBER FOR CALLS?' checkboxes. A 'Save your Widget' button is at the bottom right.

4. Proceed with the steps for how to embed your Widget in WordPress as outlined on <https://magnifi.io/wordpress-widget/>
5. For this use case, you will be embedding the widget on a product page or other ecommerce page so that customers will have easy access to contact your staff with questions.
6. Note that one or more of the “Managers who can use this widget” must be signed into the Widget Admin dashboard to accept a call. Missed calls will be redirected to a digital “leave a message” page.