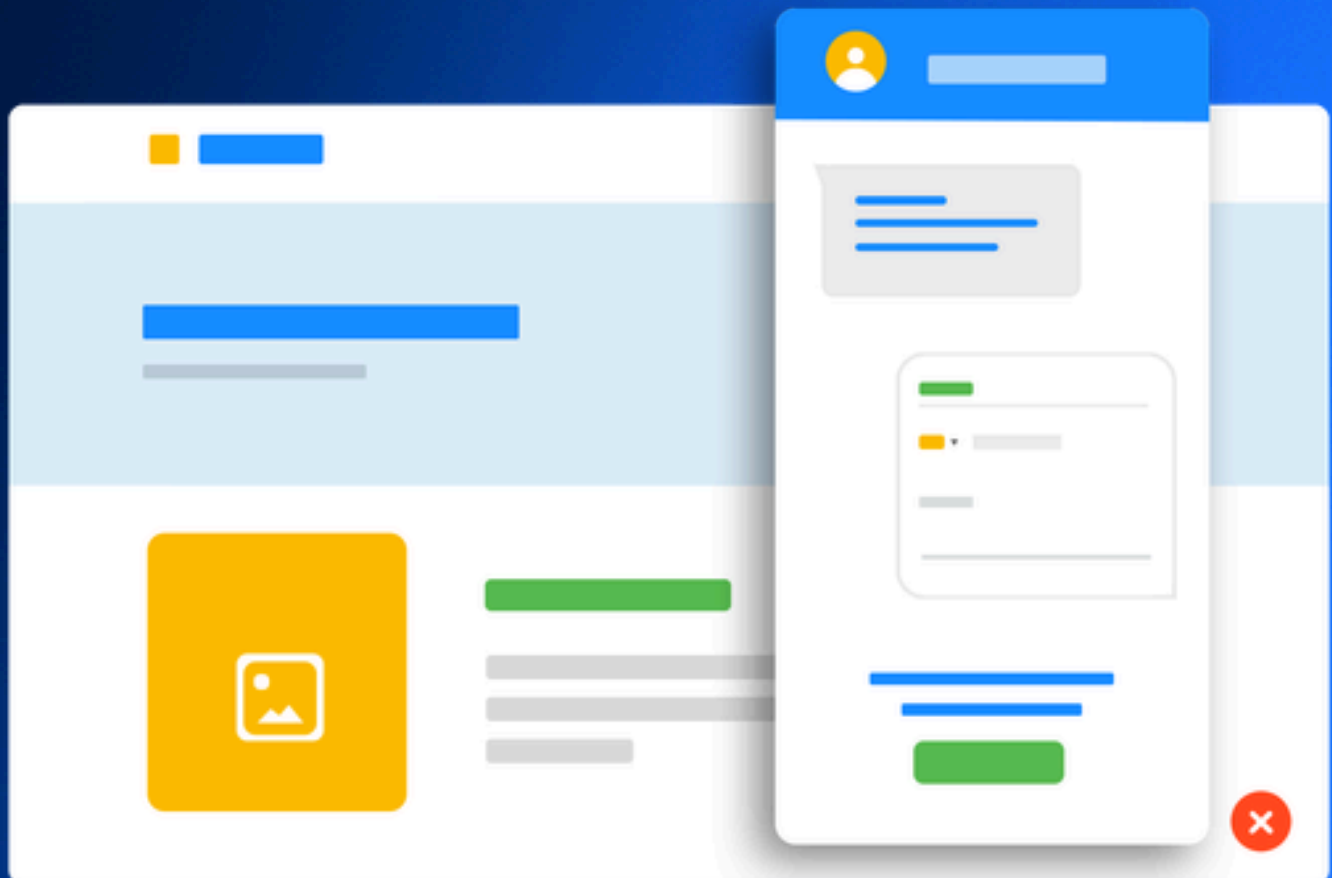


REFERENCE GUIDE

Webchat & Live Chat

Chat widgets from start to finish



Widget Types and Builder Tour

What It Is

The chat widget is a bubble on a website that visitors use to message you. You choose a widget type first, then style it in a builder with a live preview.

How It Works For Your Business

- Search for Chat Widget to see the list of widgets you have built.
- Click New to open the type picker: All-In-One, Email and SMS, Live Chat, Facebook, Instagram, WhatsApp, or Voice AI.
- The builder has tabs for the look, the Chat Window, and Messaging. Some types also show an Agent tab.
- A live preview updates as you change settings. Save, then use Get Code to install.
- The first tab may be called Widget or Style, so look for the closest match.

Widget Types and Builder Tour – Tips & Guidelines

Tips

- Look at every type before you pick one. You can always build another widget.
- Use the live preview as your guide while you work.
- Only AI-supported types show an Agent tab, so do not worry if it is missing.
- Browse and click around first. Nothing changes until you save.

DO

- Tour the list and picker first
- Check the preview often
- Name widgets clearly
- Build a second if needed

DON'T

- Save while only exploring
- Pick a type in a rush
- Ignore the preview
- Expect every tab on every type

Email and SMS Chat Widget

What It Is

This widget type turns a visitor's message into a text or email conversation in your inbox. You reply when you can, just like texting a friend.

How It Works For Your Business

- Choose New, then Email and SMS Chat in the type picker.
- On the first tab, set a theme, a chat icon, an avatar, welcome messages, and placement.
- Sticky floats the bubble on every page. Embedded places the chat inside a page.
- On the Chat Window tab, set a title, an intro message, the contact form fields, and an optional prefilled message.
- Click Save. Messages from the widget show up in Conversations.

Email and SMS Chat Widget – Tips & Guidelines

Tips

- Pick a theme, an icon, and one welcome line, then move on.
- Name plus a phone number or email is the heart of the contact form.
- A prefilled message keeps visitors from facing a blank box.
- Look for the style options and fields that show for this type, since they can differ.

DO

- Keep welcome text short
- Use a friendly avatar
- Turn on the fields you need
- Check Conversations after a test

DON'T

- Spend an hour on polish
- Ask for too many fields
- Leave the intro blank
- Forget to click Save

Live Chat and Contact Form

What It Is

Live Chat is a real-time conversation. The visitor types, you answer, back and forth. A contact form can collect their details before the chat starts.

How It Works For Your Business

- Choose New, then Live Chat, and style the widget like any other.
- On the Chat Window tab, open the live chat dropdown and find Enable Contact Form.
- With the form on, name is required plus a phone number or an email, and you can have up to five fields.
- Set the Contact Form Intro Message and the Contact Form System Message used when you click Request Contact Details.
- Look for the settings for inactivity and chat timeout messages so quiet moments feel kind.

Live Chat and Contact Form – Tips & Guidelines

Tips

- Visitors in an active chat skip the form and continue where they left off.
- Leave the form off for a faster start, and on to keep the lead.
- Leave the intro message blank to skip the form prompt.
- Look for the closest labels for inactivity and timeout messages in your account.

DO

- Turn the form on for follow-up
- Write short fallback notes
- Add an avatar
- Test as a visitor

DON'T

- Chat with unknown strangers
- Write long messages
- Skip the timeout message
- Leave default text unread

Look, Messages and Consent

What It Is

These settings make your widget look and sound like your business, from the launcher and colors to greetings, sound, and a legal notice.

How It Works For Your Business

- On the first tab, set the Chat Launcher with or without a prompt, an icon style, and a theme or custom colors.
- Set separate messages for first-time and returning visitors, and the widget dimensions. Custom sizes can be no smaller than 200 pixels.
- On the Messaging tab, add support details, greetings, the acknowledgement message, and the language.
- Under the Chat Window tab, find Additional Options for the notification sound, which plays for the visitor.
- Look for Compliance notice & consent: Show legal notice, a consent checkbox, required or pre-checked, and Load on user interaction.

Look, Messages and Consent – Tips & Guidelines

Tips

- Pick colors with strong contrast so the bubble stands out.
- Write greetings out loud first and keep the acknowledgement to one sentence.
- Notification sound is on by default for All-In-One and Live Chat widgets.
- Each widget keeps its own settings, so set them on every widget.

DO

- Match your brand colors
- Welcome returning visitors
- Keep notices short
- Refresh to see changes

DON'T

- Hide the bubble in the page
- Use stiff greetings
- Guess your notice wording
- Forget each widget is separate

Installing on Your Pages

What It Is

A widget only works once it is on a page. You can pick it in your site's settings dropdown or paste the install code.

How It Works For Your Business

- Search for Websites or Funnels, open your site, and go to Settings.
- In the Chat Widget section, pick a widget from the dropdown and click Save.
- Or open your widget, click Get Code, then Copy, and paste it into the Tracking Code icon in your site.
- To use different widgets on different pages, set the dropdown to None and paste the snippet in a Code element.
- Open the live page, find the bubble, send a test message, and check Conversations.

Installing on Your Pages – Tips & Guidelines

Tips

- The dropdown is the simplest path, with no code to paste in the wrong spot.
- After the code is installed, setting changes update without reinstalling.
- If the bubble is missing, make sure you saved, published, and refreshed.
- Give the page a few seconds, since the bubble can pop in late.

DO

- Use one method per site
- Test on a safe page
- Publish before testing
- Send a test message

DON'T

- Use dropdown and code together
- Skip the live test
- Forget to save
- Expect changes without a refresh

Outside Websites and Multiple Widgets

What It Is

You can install your chat on sites you built elsewhere, and run different widgets on different pages. You can also track widget activity.

How It Works For Your Business

- Click Get Code, then Copy, then paste the snippet where your outside platform accepts site-wide code.
- Platforms like WordPress, Wix, Shopify, Squarespace, Duda, and Weebly each place the code a little differently.
- A Google Tag Manager install option is also available for sites that already use it.
- For multiple widgets, set the site dropdown to None and paste each snippet in a Code element on its page.
- An embedded live chat sits inside a page, and widget activity can be tracked with Google Analytics 4 events.

Outside Websites and Multiple Widgets – Tips & Guidelines

Tips

- Check the help article for your platform, since code spots differ.
- Verify the bubble on the outside site, then send a test message.
- Use a Code element when one page needs a different widget.
- Look for the event options when setting up Google Analytics 4 tracking.

DO

- Follow your platform's steps
- Test after installing
- Label each widget clearly
- Use None on the dropdown first

DON'T

- Paste code in random spots
- Install twice on one page
- Skip the test message
- Mix up widget snippets

Answering Chats in Conversations

What It Is

Web chat threads land in the same Conversations inbox as your texts and emails. You can reply in real time and manage each chat from there.

How It Works For Your Business

- Search for Conversations. Web chat threads show a chat icon.
- Filter the inbox by Last Message Channel, then Live Chat, to see only live chats.
- Open a thread and reply in real time. Use Request Contact Details to ask for missing info.
- Assign the conversation to a team member, and use End Chat when you are done.
- Live chat supports voice notes and attachments, and chats close automatically after inactivity.

Answering Chats in Conversations – Tips & Guidelines

Tips

- Use the filter to separate live chats from texts and emails.
- Assign a chat so one person owns the reply.
- Use End Chat so threads do not stay open forever.
- Check how Email and SMS leads are labeled in your inbox.

DO

- Filter by Live Chat
- Assign each chat
- Ask for contact details
- End finished chats

DON'T

- Let chats sit unanswered
- Ignore the chat icon
- Leave threads open
- Assume every chat is live

Business Hours and Visitor Fields

What It Is

You can tell Live Chat when you are available, and choose which details visitors share, including custom fields.

How It Works For Your Business

- On a Live Chat widget, open the Chat Window tab and look for Business Office Hour Setup.
- Set time ranges from Sunday to Saturday, copy them to other days, and choose a timezone.
- Write an Outside Office Hours Welcome Message. Outside hours, the preview shows the contact details form instead of live chat.
- In the contact form fields, name and a phone or email stay required, and you can have up to five fields.
- Add custom contact fields, mark them required, and use the customizable message field. Look at the contact record for the data.

Business Hours and Visitor Fields – Tips & Guidelines

Tips

- Set the right timezone first or your hours will be off.
- Use copy to other days to save clicks.
- Preview outside your hours to see what visitors see.
- Keep fields few. Each extra field is one more thing to fill in.

DO

- Check the timezone
- Preview outside hours
- Mark needed fields required
- Keep the form short

DON'T

- Use too many fields
- Skip the outside message
- Guess your hours
- Forget to save

All-In-One, AI and Automations

What It Is

All-In-One Chat offers several channels in one bubble. You can also let Conversation AI answer chats and build workflows for chat replies.

How It Works For Your Business

- Choose New, then All-In-One Chat, and use the Chat Type multi-select on the first tab to pick channels like Live Chat, SMS/Email, or WhatsApp.
- Each channel has its own settings, such as a Live Chat display name and offline behavior, or a WhatsApp number and greeting.
- A standalone WhatsApp widget is also available, along with Facebook and Instagram types.
- For AI replies, search for Conversation AI, open an agent, and use the Deploy tab to turn on Live Chat or Chat Widget channels.
- In Workflows, the Customer Replied trigger can filter by Reply Channel All-in-One Chat and by Chat Type or widget.

All-In-One, AI and Automations – Tips & Guidelines

Tips

- Test a chat after turning on an AI channel.
- Assign an AI channel to a specific widget when you have several.
- You can hand a chat to a human from Conversations.
- Check which chat types are available for your account before planning.

DO

- Test AI replies
- Assign channels to widgets
- Review each channel's settings
- Plan a human handoff

DON'T

- Turn on every channel
- Skip testing
- Mix up widgets
- Forget to save changes

Key Terms Glossary

Chat widget

The chat bubble on a website that visitors click to message you.

Widget type

The kind of chat you pick, like Live Chat or Email and SMS.

Live preview

The builder panel that updates as you change settings.

Sticky

A placement that floats the bubble on every page.

Embedded

A placement that puts the chat inside a page.

Contact form

The part of the chat window that collects a visitor's details.

Chat Launcher

The bubble itself, with or without a prompt beside it.

Acknowledgement

A short note confirming the visitor's message was received.

Get Code

The button that gives you the install snippet.

Tracking Code

The site area where you paste the install snippet.

Office hours

Times when Live Chat is available for real-time replies.

Conversation AI

An AI agent that can answer chats for you.

Getting Help

Software changes over time, so a button or menu name may look a little different in your account. If something does not match, check the chat widget's own in-app help or the Help link in your software for the latest steps.