Inbox Pro
Setting it up for success!

Use this *step-by-step* **guide to ensure your Inbox Pro is optimized to its full potential!**

Begin Here 👇

1. ***Make sure that you have the correct information in the Business Profile.***
   - Business name
   - Address and/or service areas of the business
   - Your Website
   - The Business Phone number
   - Business Categories
   - Hours of operation
   - General Services offered
   - Social media URLs
   - Your Booking URL
   - Description Tabs
     - Short description
     - Long description

   ▶️ ***Refer to*** *"Chat Widget Set Up"* ***for a Visual Guide!***

2. ***Ensure that your SMS number is connected and registered from the Inbox Settings Screen.***
   - *the A2P20DLC registration may take up to 2 weeks*

   Optional: *If you want to take a step further, be sure to also connect your* **Google Business Messages** *and* **Facebook Messenger** *too!*

3. ***Configure Web Chat***
   ▶️ ***Refer to the*** *"Widget Configuration"* ***video for a step-by-step process!***
   - *Ensure your widget has a name*
   - *Give it a custom "Web Chat" greeting*
   - *Change the colors to reflect the branding of your website*

4. Setting up the AI Assistant Knowledge Base

Note: This can be accessed by the "**Manage Knowledge**" link found under the AI Assistant section of the Website Configuration Screen.

- Click "Add Knowledge"
    - We recommend naming one "Questions & Answers."
    - For the content, we recommend using the **provided template** to get started. Feel free to copy and paste the template to the "Content" section.
    - Add Answers to the relevant questions of your business and remove ones that don't apply.
        - **Note:** Ensure that you use the same format provided in the template for best results.
    - Once you're done, **click Save**!
- Once you click "Save" there will be a little pop-up taking you back to the "**Inbox Settings**".
    - Select the link (or navigate back to the Inbox Settings on the right-hand tab)
    - Scroll down and press "**Configure Webchat.**"
    - Under the AI Assistant screen, click the bar that states "**Select Knowledge**."
    - From there, select your newly created Knowledge Base.
    - Remember to press "**Save**"!
- Once you're done that, your widget is successfully set up and ready to go!

5. **Feel free to visit your website and interact with your widget to experience the customer's journey for your self!**

Drive *more customers* to your client's doorstep in record time!
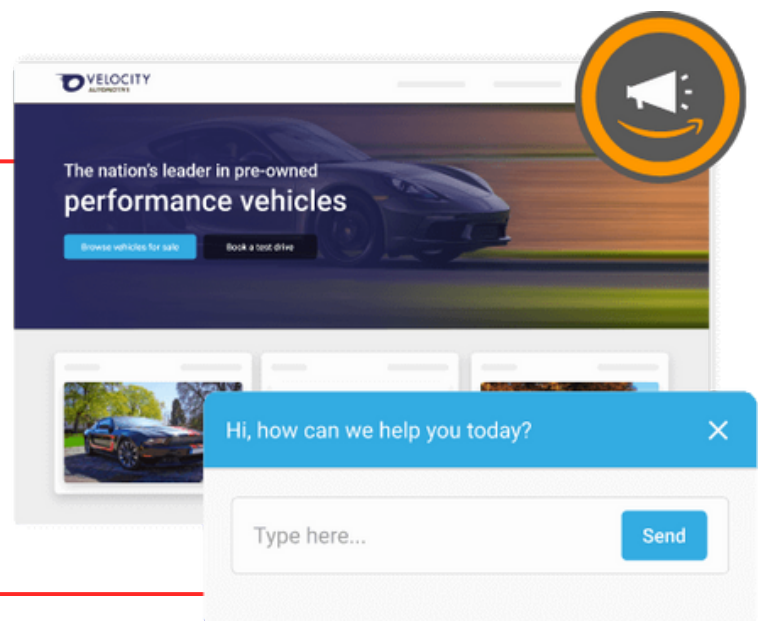
Inbox Pro
Tips & Best Practices

Do's

- Be as **specific as possible** with the information you provide in the **Knowledge Base**

- Expand on your **Business Services** offered in Knowledge Base
  - specific products, models/makes, scope of each service
    - ex. If your business offers electrical repair, you can add **"outlet repair, smoke detectors, light fixtures, etc."**

- When Adding Questions and Answers to the Knowledge Base, **customize your answers** by anticipating the questions your customers will be asking when visiting your site!

Don'ts

- Use incorrect spelling and formatting, as the widget will use and showcase that information the exact way you entered it

- Don't try to give the AI communication instructions, it won't follow them.

- Do not add duplicate information to the Business Profile and the Knowledge Base
  - Ex. Business Name and Hours of Operation

We want to make sure that you have everything you need. Please find these links for extra guidance!

AI Template   **Chat Widget Set Up**   **Widget Configuration**