

sayso is a suite of communication features that allows website visitors to call sales or support representatives through a browser using the device's microphone. These features act as an alternative to slow, impersonal text chat, as well as the time-consuming hassle of dialing a phone number and navigating recordings and menus. **sayso** is included free in OnSIP accounts.



Overview

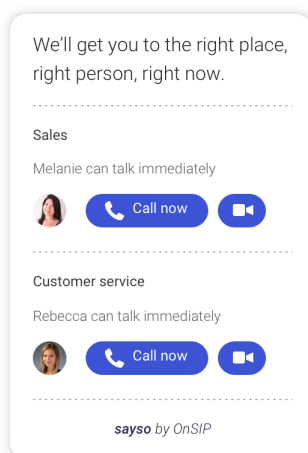
SITE VISITORS

People visiting your organization's website may want to speak with a human to discuss details, ask questions, or receive support. What these visitors will find is a button with a phone icon floating in the bottom corner of your site.



Upon clicking that button, the site visitor will find a list of discussion topics for call routing. For each topic, an available representative is selected and paired with the site visitor for a one-to-one call. The visitor can choose to initiate a voice or video call, if the organization/representative chooses to allow video.

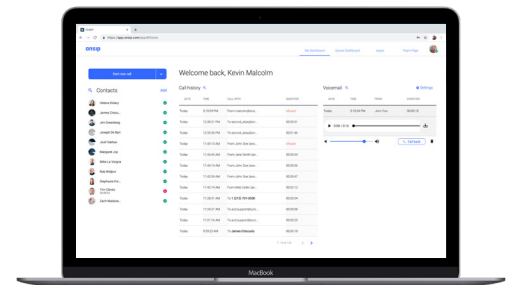
Before the visitor even initiates a call, they know there is someone available to take their call and they can see the name and photo of the representative they will speak with.



ORGANIZATION REPRESENTATIVES

Organizations using sayso will want their representatives logged into the OnSIP desktop app. This app functions like a standard desk phone, but also offers flexibility for additional information, such as call statistics and contact information.

Representatives are eligible to receive **sayso** calls as long as they are Available (not Away or Busy) and associated with a topic. For example, if a representative is enrolled in the Technical Support topic, they may receive support calls from website visitors.



The incoming call pop-up displays the caller's selected topic and the webpage from which they're calling. This information helps the representative prepare for the call and possibly skip some introductory questions.

INCOMING PHONE CALL

Web Caller

From: "Features" on "Pricing | OnSIP"

To: michael.lavorgna@junctionnetworks.com



Expires in 00:00:14

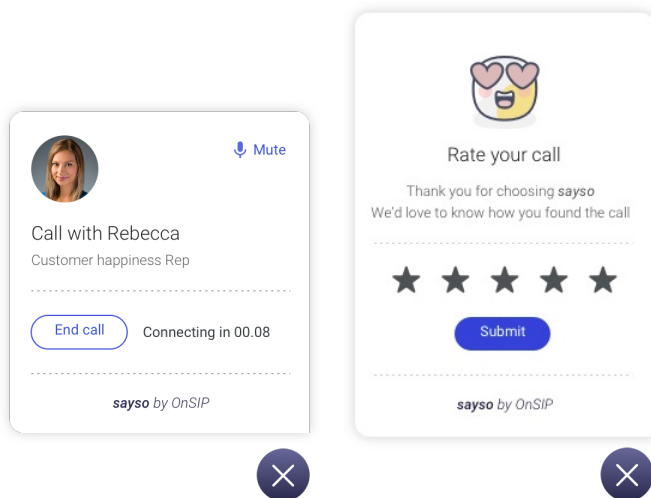
Overview *(cont'd)*

SITE VISITORS

If no one is available to take their call right away for a certain topic, the visitor will be presented with the option to receive a browser notification once a representative becomes available.

Once a call is initiated, the controls are quite simple for the site visitor. They'll be prompted to give microphone/camera permission for the call during a short countdown period.

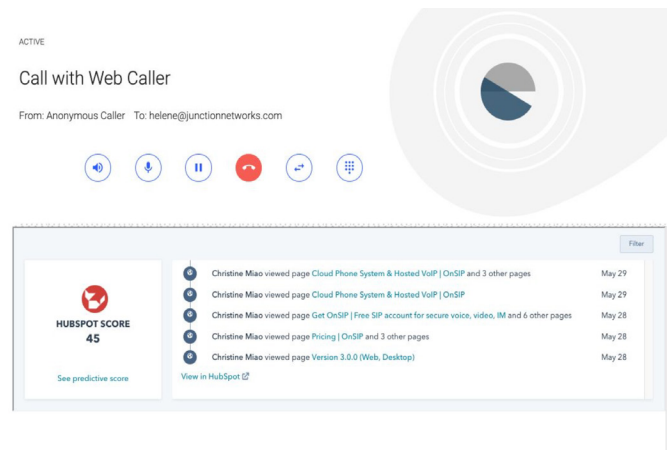
When the representative answers, callers are offered the options to mute or end the call. Ending the call reveals a short survey.



ORGANIZATION REPRESENTATIVES

For organizations with Hubspot CRM: Callers who are recognized as contacts will also have the contact's activity history below the call.

You can immediately see an overview of their Hubspot CRM info, with a link to the full record that opens in a new tab.



SCREEN SHARE WITH SAYSO

Representatives can also initiate a screen share with a site visitor during a video call through OnSIP's web or desktop app.

The rep can choose whether to share their entire screen with the visitor or just a specific open browser tab or open application window.

Screen sharing is also available for video calls received from a company's Team Page and Personal Pages.

Getting Started

CREATING TOPICS

The first thing your organization administrator will want to do is create a list of topics that people typically call in about, such as Plan Details or Partner Program. To create a topic, log into the OnSIP app, click **sayso** in the top navigation.

You'll be asked to designate which representatives should be eligible to receive calls on that topic. For example, general support topics may be routed to the whole support team, while niche issues may only be answered by one or two experts.

You'll also be asked when the topic button should be displayed on your site, which pages should include it, and which countries should be whitelisted.

GOING LIVE

After you've created your topics, you can connect your website by following the Installation Guide in the **sayso** tab of the app. In short, your site administrator will just need to copy/paste a few lines of javascript into your site's global header, similar to how you'd install analytics or text chat software.

At this point, the topic buttons should appear on your site. You'll want to make sure your representatives are available to receive sayso calls by having them log into the OnSIP desktop app.

If a representative needs to grab lunch or run to the bathroom, the app's "Away" mode will remove them from the list of available agents while still keeping them signed in.

