Context to Call Business
User Guide

BigCommerce Platform

Version 1.4

User Guide Contents

Introduction

Welcome to the Context to Call Business BigCommerce user guide! This guide will help you set up Context to Call Business Sources and Points and integrate your newly generated Embed Code on your Website effectively to enhance your business experience.

Sign-In

- **Open the Sign-In Page:** Open your web browser and go to the Context to Call Business Sign-In page.
- **Enter Email Address:** In the appropriate field, enter the email address associated with your account.
- **Provide Password:** Enter your account password in the designated password field. Be sure to use the correct combination of uppercase and lowercase letters, numbers, and special characters.
- **Remember Me:** Sign-in forms offer a "Remember Me" option. Selecting this option will keep you signed in on that device/browser for an extended period.
- **Click "Sign In":** Once you've entered your credentials, click the "Sign In" button to proceed.

Fig 1 - Login

Dashboard

● **Access Your Account:** Upon successful authentication, you will be granted access to your Context to Call Business account and directed to your account dashboard page.
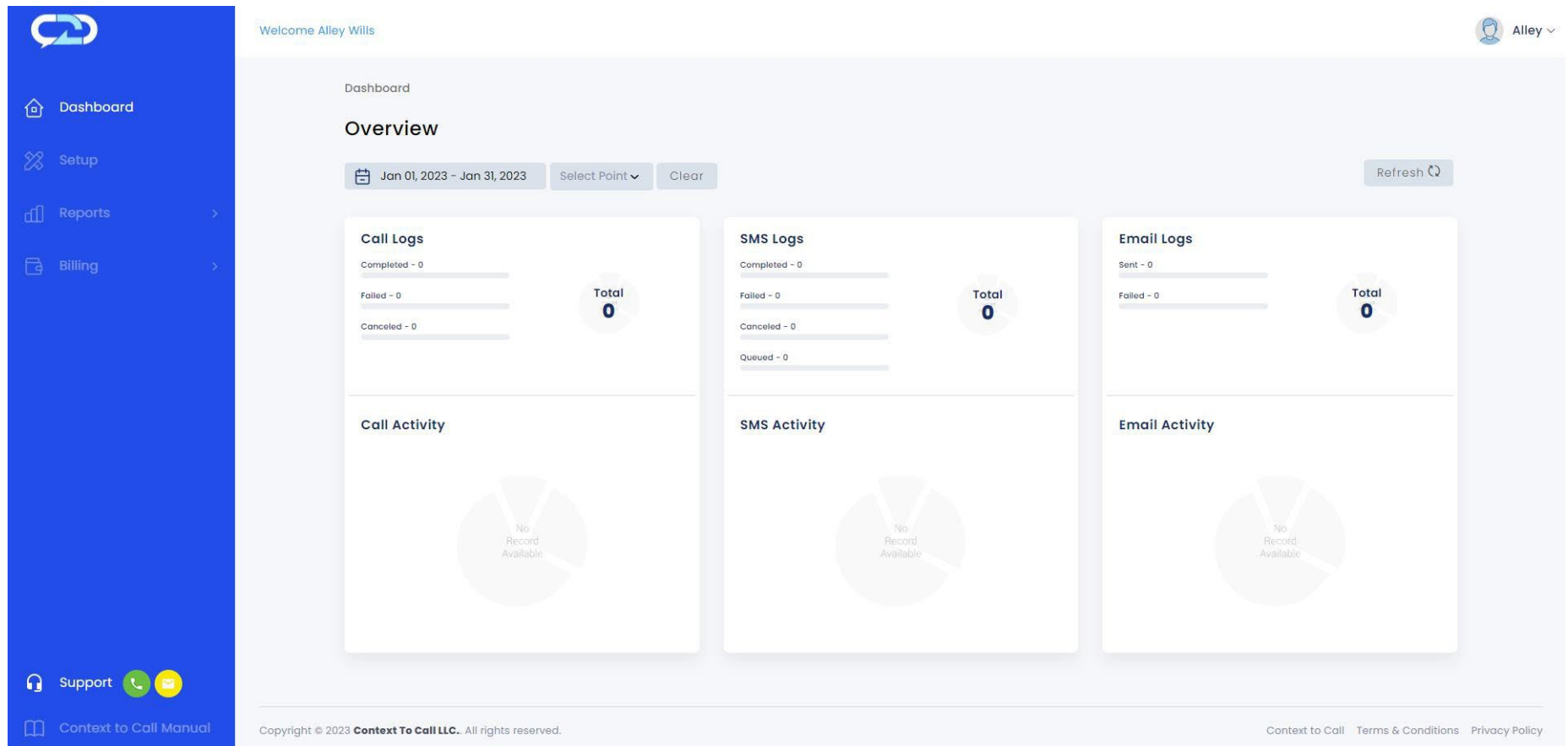

Fig 2 - Dashboard

Generate Context to Call Business Embed Code

Step 1: Accessing the Setup - Point Management

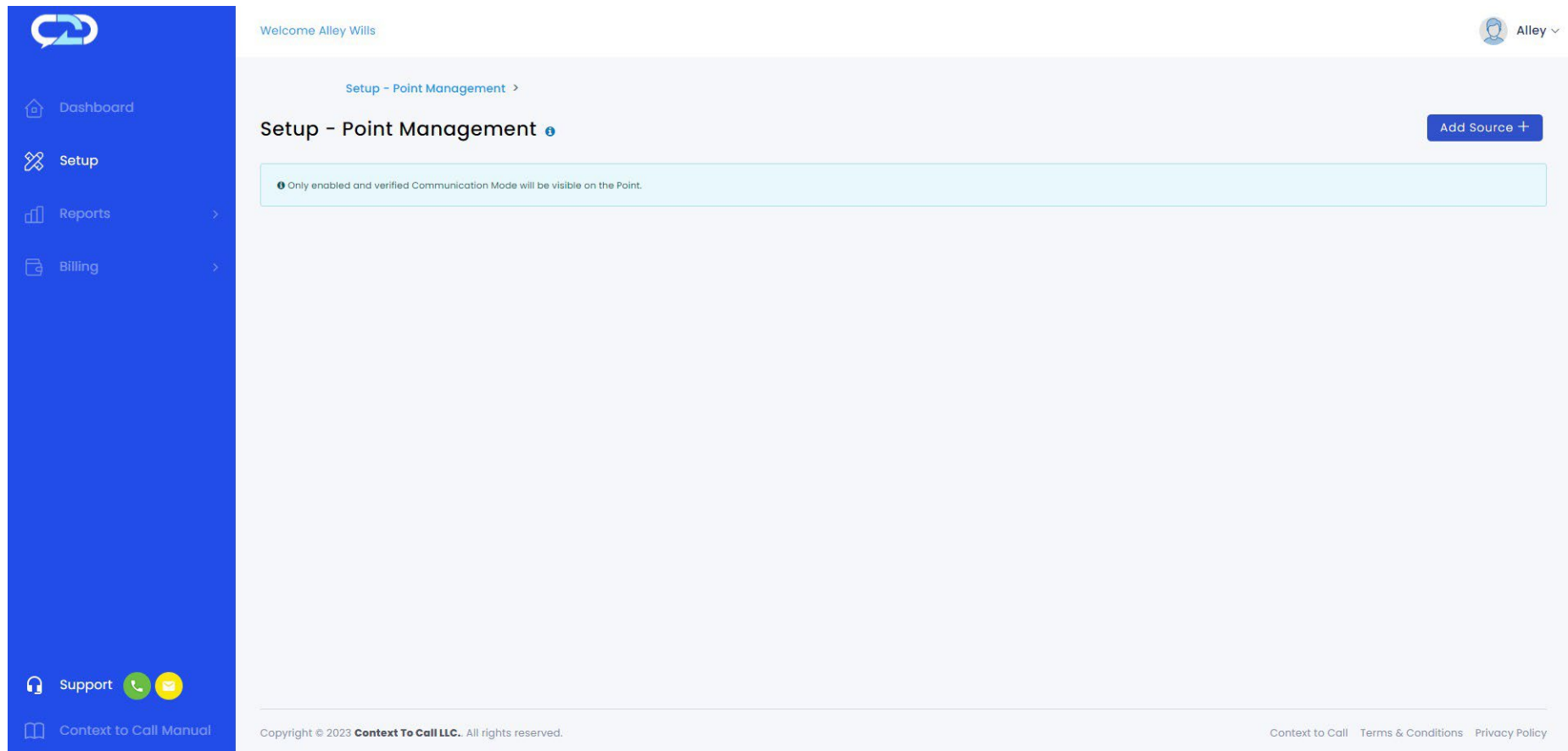- Click on the "Setup" option located on the navigation menu.

Fig 3 – Setup - Point Management

Step 2: Adding Source

The Source contains the Points added under it. The Source name refers to the website name.
Example - If you have a website called "www.amazon.com", you can name your Source as Amazon.

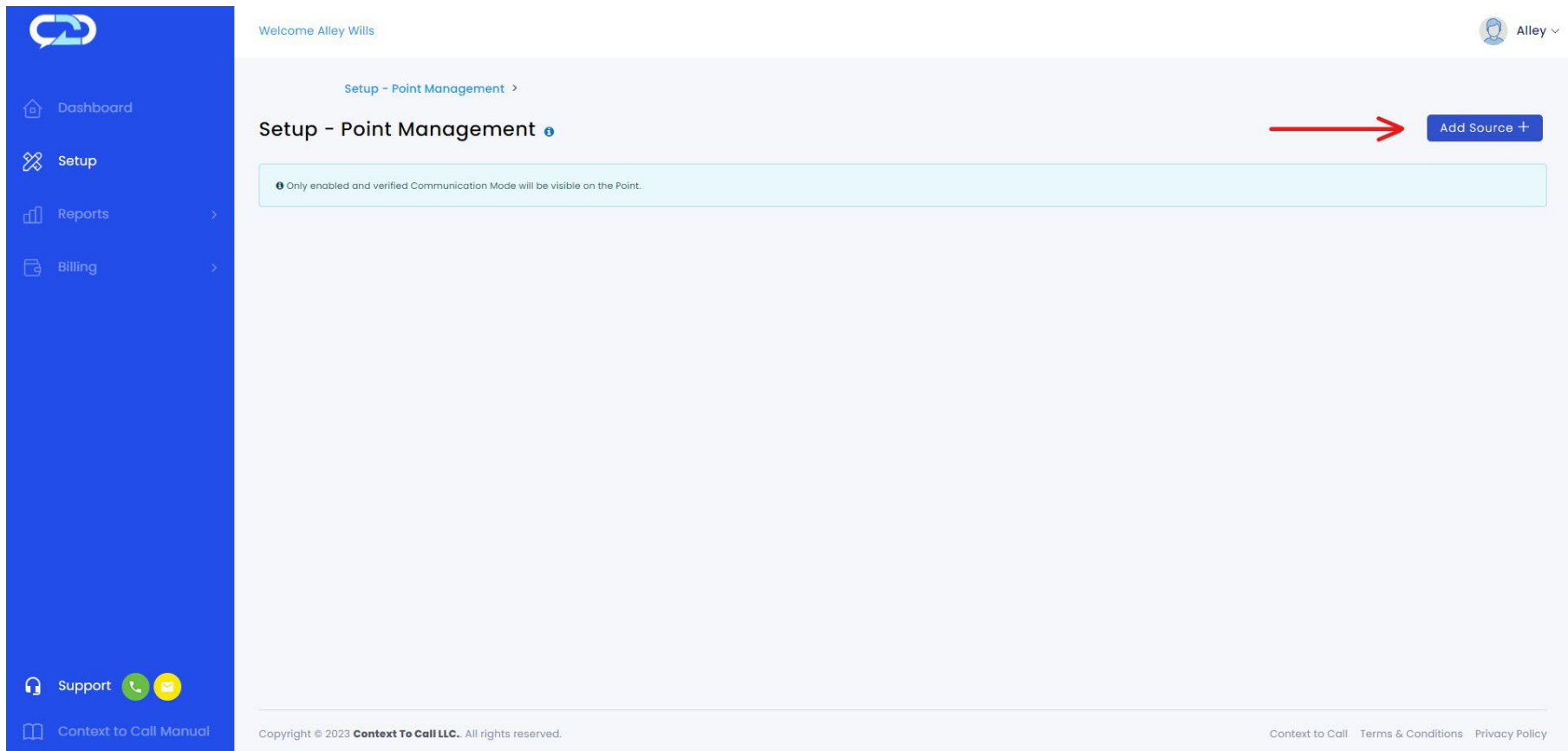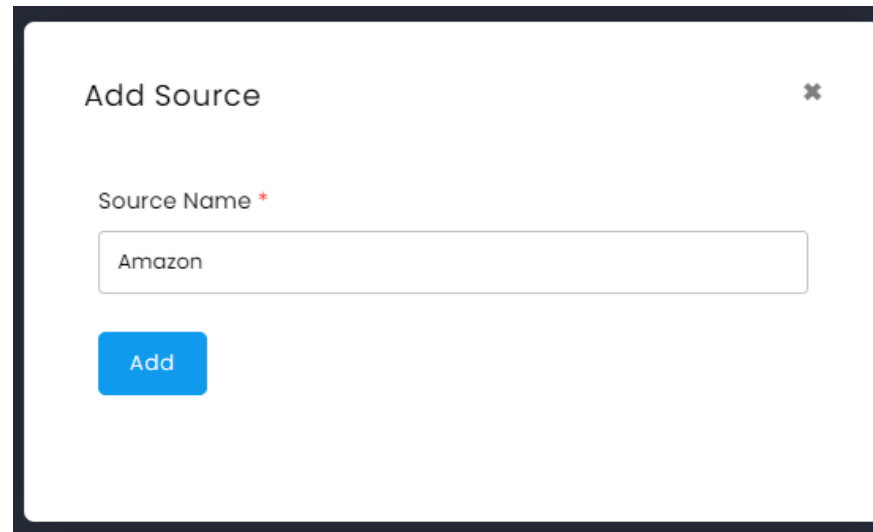- Click on the 'Add Source' button.

Fig 4 – Add Source

● Enter the Source Name and click on the 'Add' button.

Add Source   ✖

Source Name *

Amazon

Add

Fig 5 - Add source

✓

Success

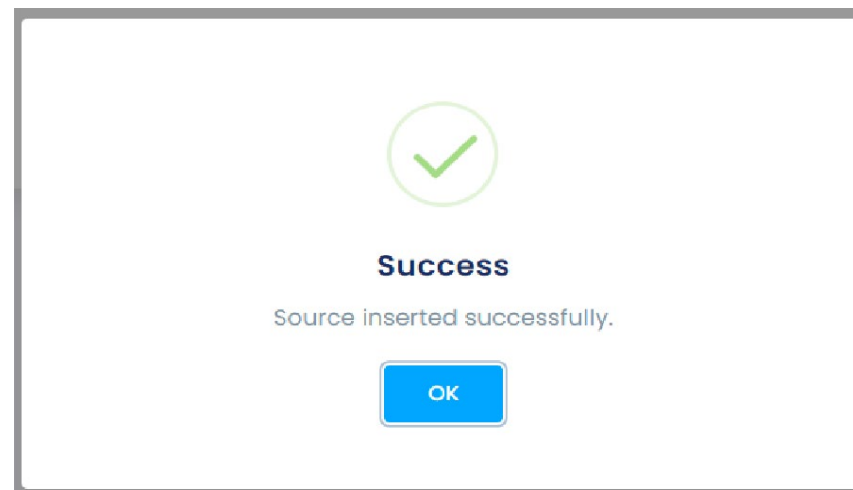Source inserted successfully.

OK

Fig 6 - Source Added

Types of Point

Global Points and Local Points

The Context to Call Business user can add Global Point or Local Point once at a time while adding a point by enabling/disabling the toggle button for their website domain or limited to a specific website page URL.

1) Global Point – It is used for creating communication points that are related to a specific Website Domain. Domain Name main part of the address, such as "example" in "example.com.

   The Context to Call Business users can place communication points anywhere on their website which will be visible where they have placed the point on their website. The Context to Call user must provide a domain name of their website under the "Website Domain" textbox.

   The communication point will function only if the domain name provided by the Context to Call Business user matches the domain name of where the Global Points are placed.

2) Local Point – It is used for creating a communication point for the specific Page of the website. The domain is the main part of the URL that identifies the website, and the path indicates the specific location of the page within the website's directory structure.

   It may include folders, subfolders, and the page filename. For example, "/page" is the path in the URL "https://www.example.com/page".

   The Context to Call Business users can create communication points for different pages of their website by providing the Page URL under the "Website's Page URL" textbox.

   The communication point will function only if the Page URL provided by the Context to Call Business user matches the Page URL where the Local Points are placed.

Step 3: Adding Point

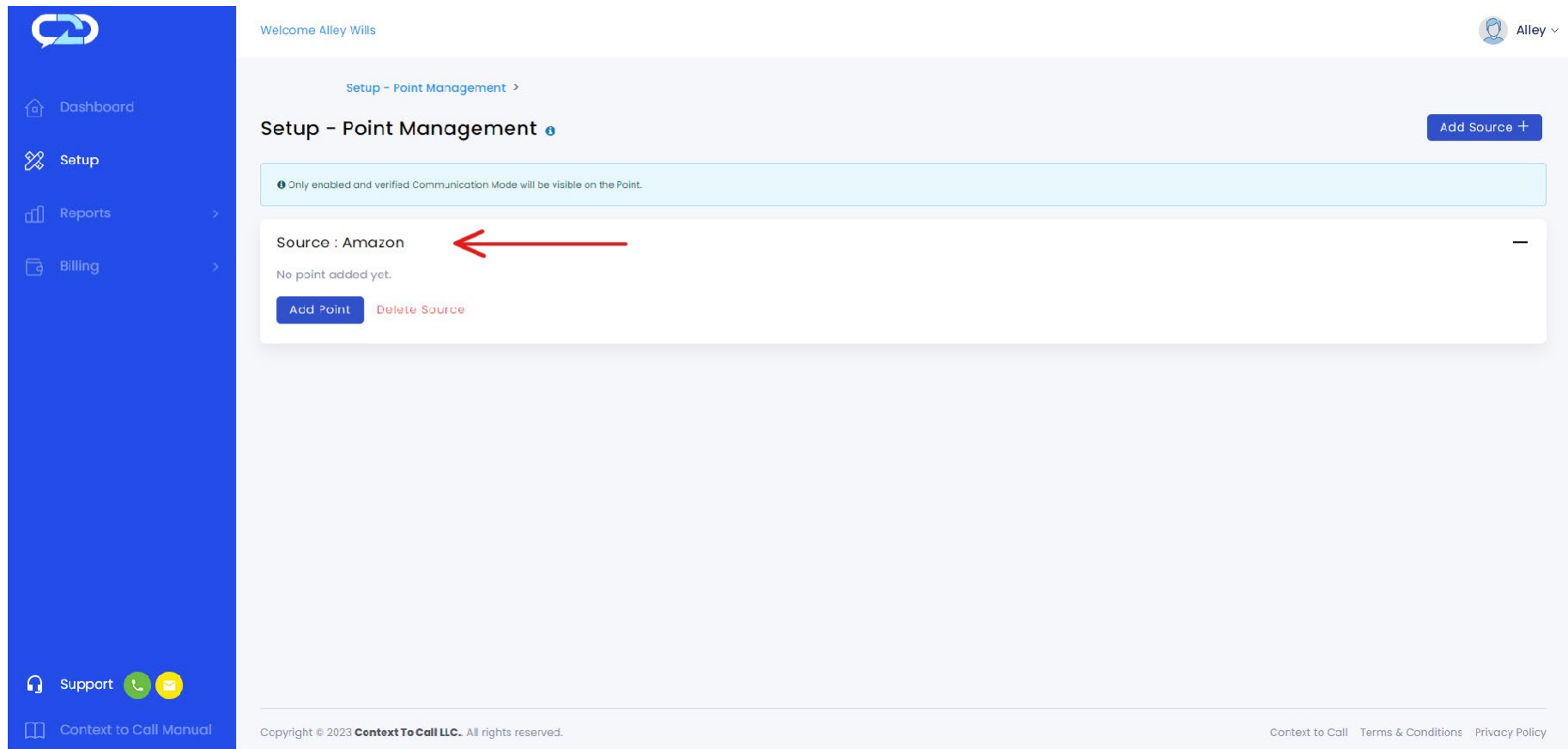● The Source inserted in the previous step is visible under Setup - Point Management.

Fig 7 – Source: Setup - Point Management
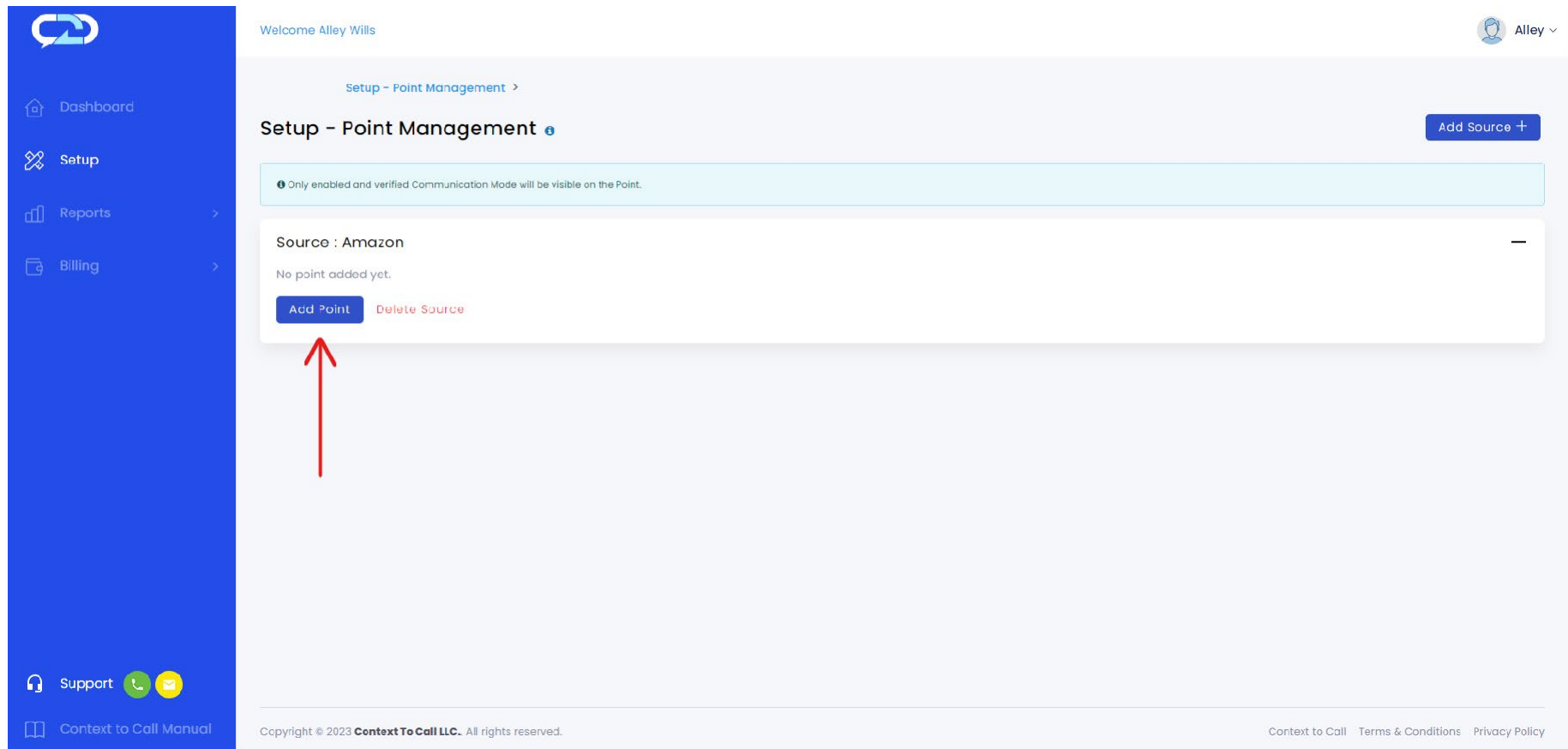
● Click on the 'Add Point' button.

Fig 8 – Source: Add Point Button

Creating Point: Point Details page.

- Upon clicking the 'Add point' button in the set-up page under any created source, user is navigated to point details page. [Refer to Fig - 9]
- Source under which you added the Point will Auto-Populate in the Source Name field. [Refer to Fig -9: 'Source Name' Field]

Fig 9 - Point Details

Adding Global Point

- The Source under which you want to add the Point will Auto-Populate in the Source Name field.
- Select 'Point Type' as 'Website' from the dropdown.
- Enter 'Point Name' for your reference. For example, if you want to place an Icon on your website's Home Page.
- Enable the 'Global' toggle button to make the point a Global Point.
- Enter the Website Domain in the 'Website Domain' textbox.
- Select the 'Communication Modes' you want to place on your website.
- Click on the 'Add' button to add the point. Refer to Fig – 10

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Setup - Point Management > Point Details

Step 1: Point Info.

Source Name *	Amazon
Point Type *	Website
Point Name *	Home Page
Local/Global Point ⓘ	Global
Website Domain *	https://www.amazon.com
	The full URL, e.g. 'https://contexttocall.com'
Select Mode(s) *	☑ All ☑ Call ☑ SMS ☑ Email
	Above selected mode will be visible in your source

Add

Fig 10 – Add Point: Global Point
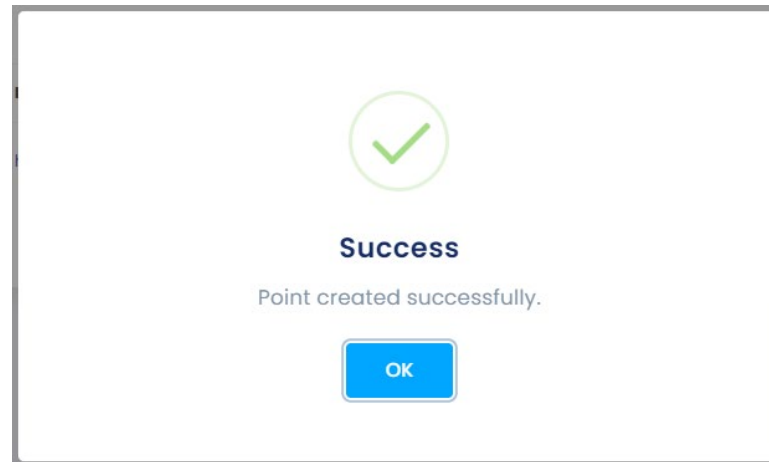
Adding Local Point

- The Source Name will auto-populate for you.
- Select 'Point Type' as 'Website' from the dropdown.
- Enter 'Point Name' for your reference. Ex., if you want to place icons on your website's Contact Us page.
- Enable the 'Local' toggle button to make the point a Local Point.
- Enter the Website Page URL in the 'Website's Page URL' textbox. Ex., if you want to limit the Icons to a specific page of your website i.e. "www.amazon.com/contactus"
- Select the 'Communication Modes' you want to place on your website.
- Click on the 'Add' button to add the point.
- Refer to Fig - 12.

Fig 12 – Add Point: Local Point
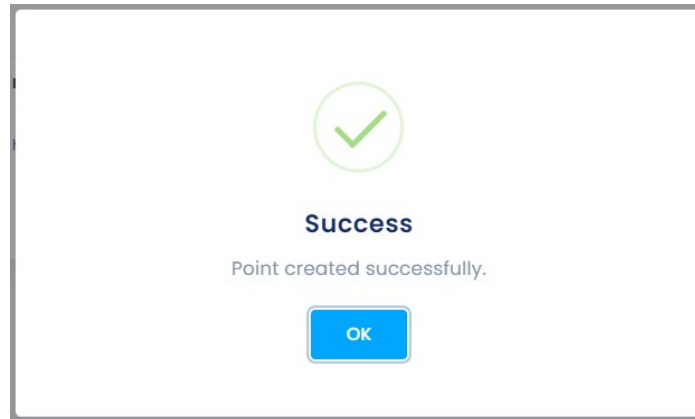
Fig 13 – Local Point Added

- User can view added Points under the Setup - Point Management section. [Refer to Fig .14]

Fig 14 – Points Added under Source

Step 4: Points Verification and Create Embed Code.

● Click on the 'Verify' button to view and edit the 'Point Details' under Setup - Point Management. [Refer to Fig – 15]

Fig 15 – Points View Button

● Upon clicking the 'Verify' button on any of the created points in the 'Setup - Point Management' page, the user is landed on the Point Details page [Refer Fig.16], which allows the user to verify and update [Refer to Fig. 16] point details and create the Embed Code.

Fig 16 – Point info: Edit Button

The Point Details page has three sections for generating the Embed Code after creating the Source, Points, and verification of the communication modes.

Step 1: Point Info [Refer to Fig. 17]

- Users can Edit and Update the Point details as and when required.
- User needs to verify communications modes (Call/SMS/Email) to generate Embed Code.
- Status toggle button grants users the ability to activate or deactivate the communication point, and the communication modes (Call/SMS/Email - Icons). It can be activated or deactivated as per the admin's requirement.
- Refer to Fig – 17 to implement the above steps under step 1: Point Info option.

Fig 17 - Point details: Step-1

- Click on the 'Verify' button located below the 'Call', 'SMS', and 'Email' label to verify the communication mode individually.
- Enter your Business Contact information, where you want to receive the 'Call' & 'SMS'.
- Enter your Business Email information, where you want to receive the 'Email'.

Fig 18 – IVR Verification Screen

- Click on the 'Proceed' button to receive the OTP to verify the 'Call', 'SMS', and 'Email' individually. [Refer Fig. 18]
- The 'Verify' button will turn to 'Verified' and click on the 'Update' button to update the verification changes. [Refer Fig. 19]

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Setup - Point Management > Point Details

Step 1: Point Info.

| Point Name | Home Page |
| Website URL | https://amazon.com |

Local/Global Point ⓘ   Global

Status   Active

Icons

☑ Call   ☑ SMS   ☑ Email

Verified   Verified   Verified

Change Number   Change Number   Change Email

Update   Cancel

Step 2: Point Setting

Callback Form Fields

Fig 19 – Point Info: Update Button

Step 2: Point Setting: Callback Form Fields. [optional]

- Once the user embeds the code on the website, the callback form appears after clicking on the Context to Call Business icon on the webpage.
- The call back form fields displayed on the webpage can be customized from the point setting section. [Refer to Fig. 21]

Fig 20 – Point details: Step 2: Point Setting
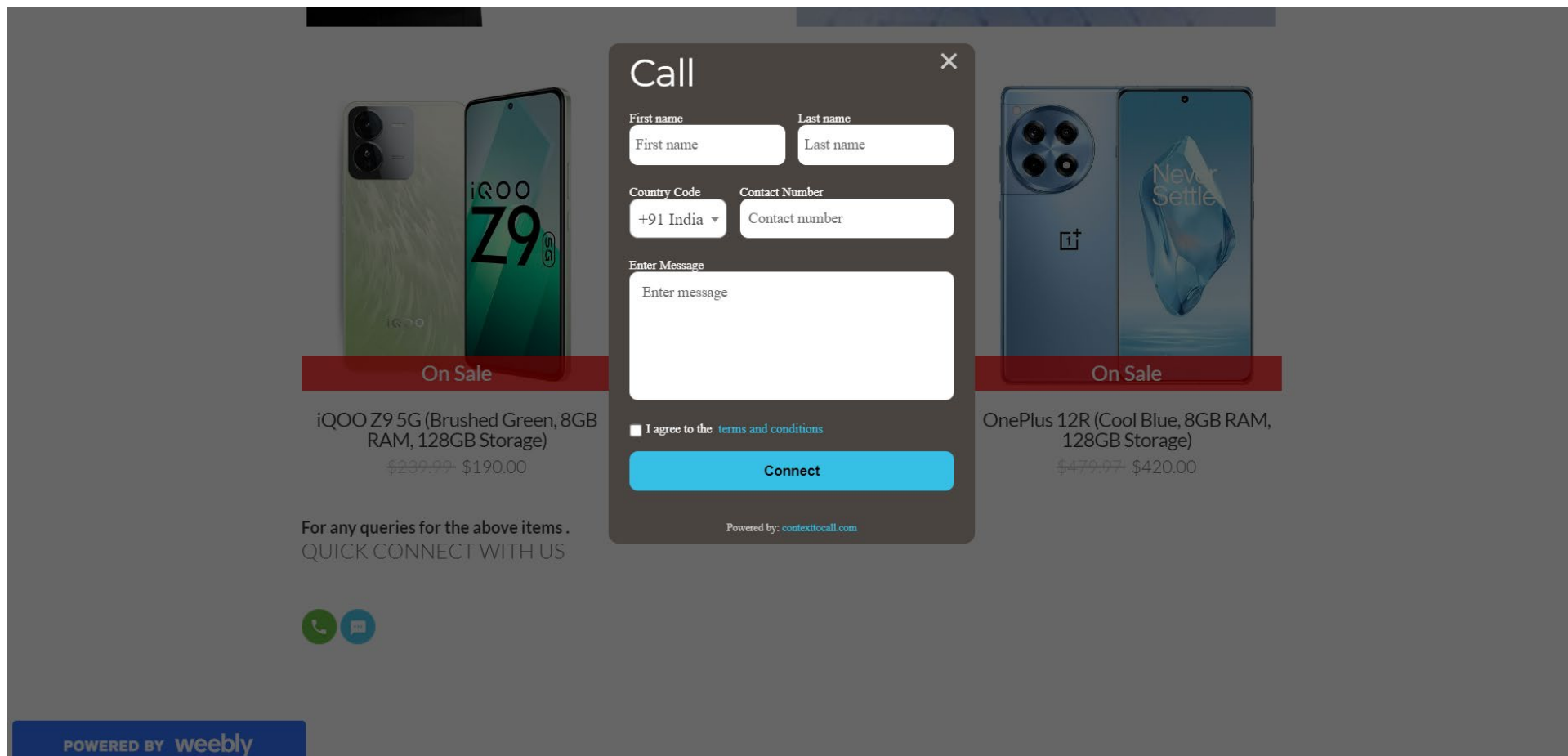
Fig 21 - Point Details: Callback Form

Step 3: Embed Code

- To integrate the desired communication point on the website, the admin needs to copy the Embed Codes in the HTML of website.
- The position of the Call/SMS/Email icons will be as per the code pasted in the HTML.
- To enable the Context to Call Business functionality, update the URL of the page in the step-1 the point info > [website] field. [Refer to Fig 22]

Fig 22 - Point details: Step 3: Embed Code

Integrating Embed Code – BigCommerce

Fig 23 – Big commerce logo

- Sign In to your BigCommerce account "https://login.bigcommerce.com/login".
- On the left navigation menu, click on "Storefront" > "Themes".
- Select your theme and click on the "Customize" button to open the Page Builder Tool.
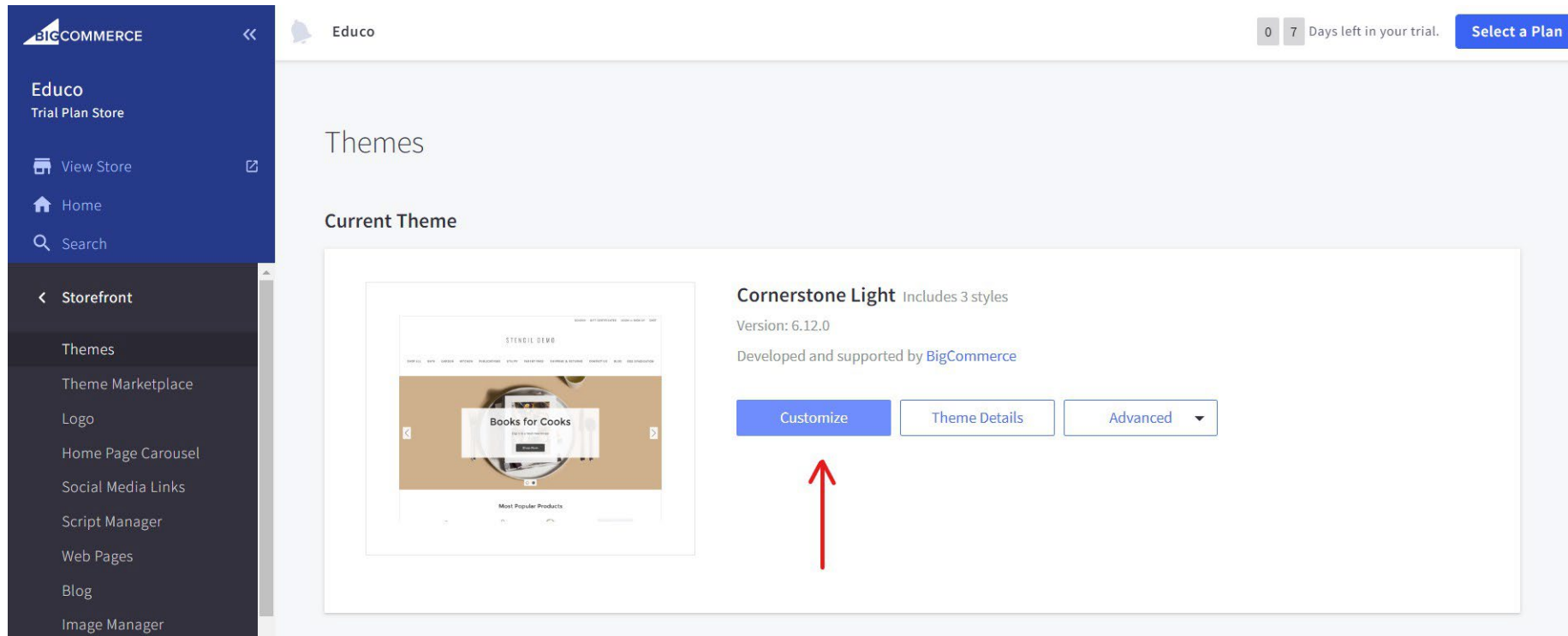

Fig 24 – BigCommerce: Customize

- Select the page from the "Page Dropdown", you want to place the Context to Call Icon.
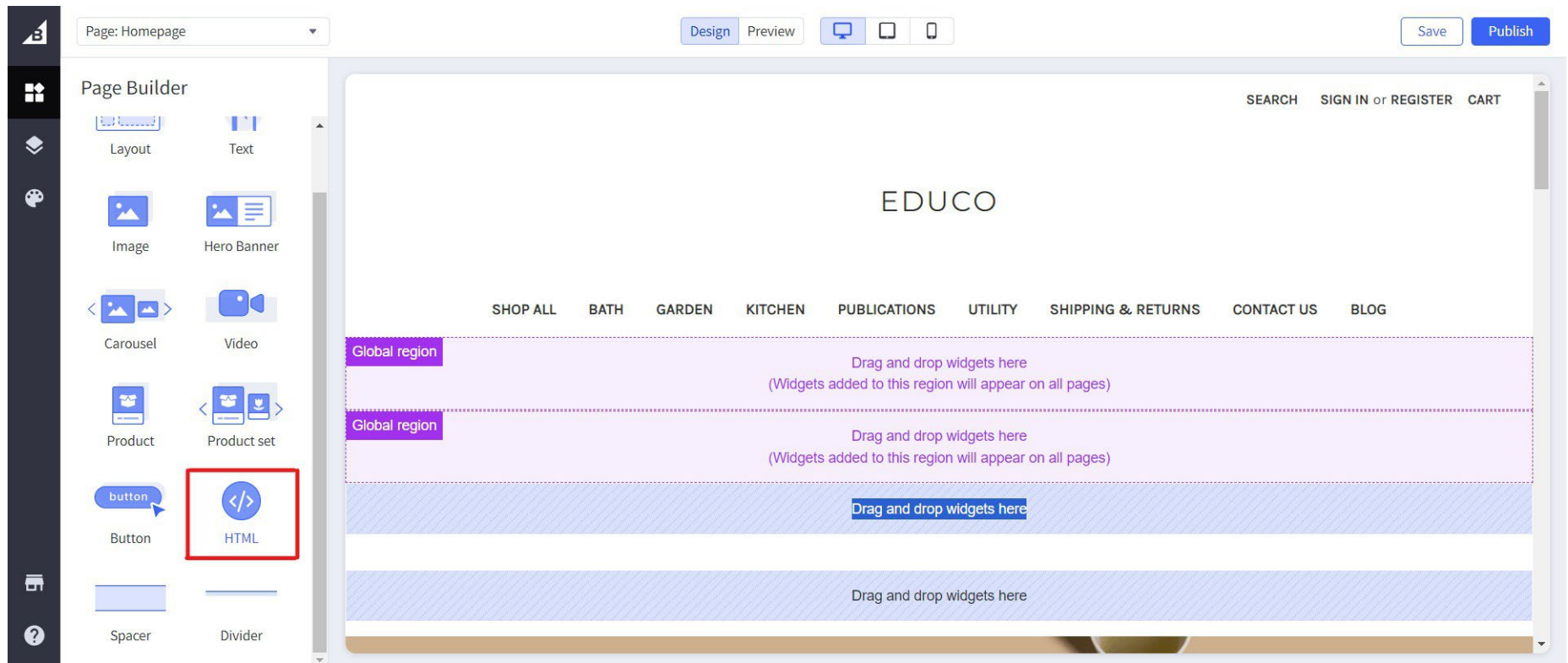- Drag and drop the "HTML" on the option "Drag and drop widgets here"

Fig 25 – BigCommerce: HTML Drag and Drop

- Paste the Context to Call Business Embed code in the HTML editor opened on the left panel.
- Click on the "Save" button to save your progress.

Fig 26 – BigCommerce: HTML Editor

- Click on the "Publish" button to publish the changes on your website.
- Go to the dashboard page of your account and click on "View Store" on the left menu. This will open your published website on the new window and copy the domain/page URL.

Fig 27 – Dashboard: View Store

● Update the website "Domain" or "Page URL" on the Context to Call Business Webapp > Setup - Point Management > Point Info. > Website URL.

Fig 28 – Setup - Point management > Point Info.

- You can preview the changes or visit your website, the Context to Call Business Icons will be displayed on the website.

SEARCH   SIGN IN or REGISTER   CART

THE URVI'S

SHOP ALL   BATH   GARDEN   KITCHEN   PUBLICATIONS   UTILITY   SHIPPING & RETURNS   CONTACT US   BLOG
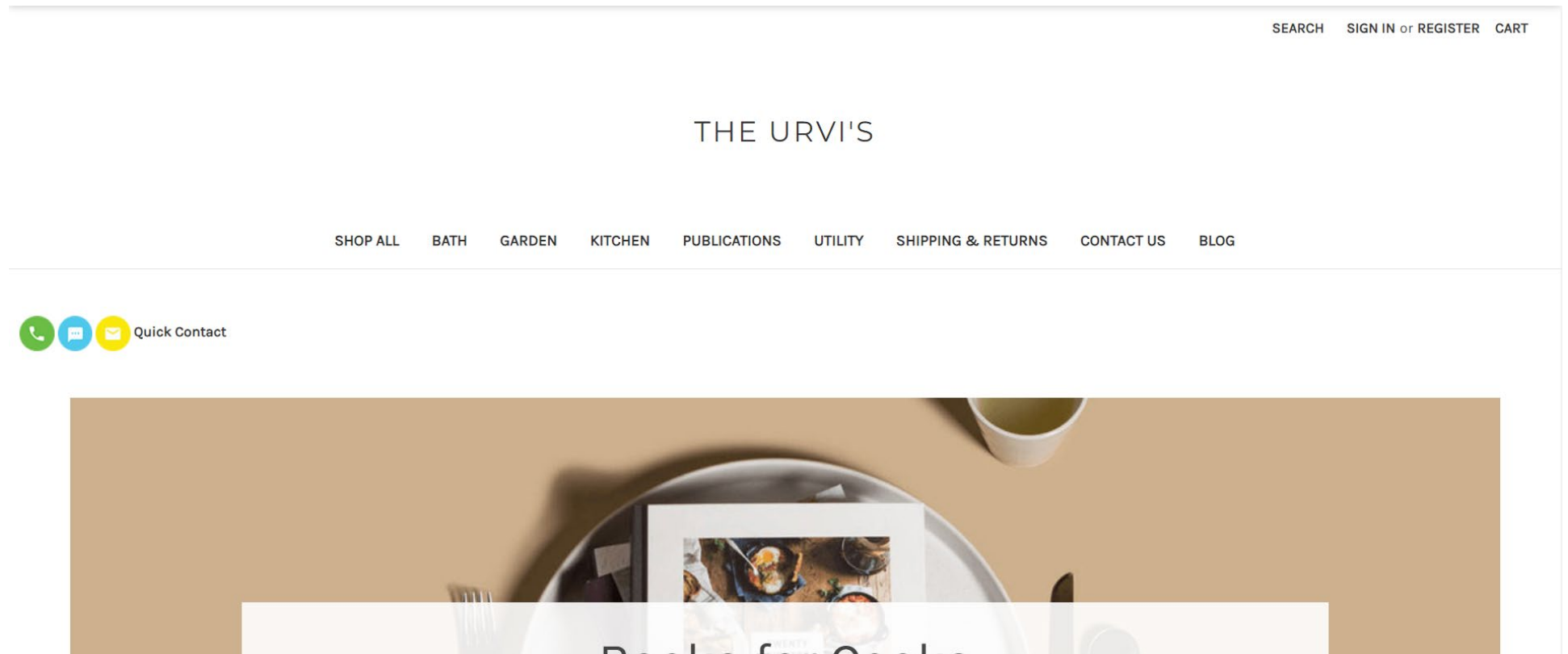
Quick Contact

Fig 29 – BigCommerce: Context to Call Icons