



Context to Call Business User Guide

Squarespace Platform

Version 1.4

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Introduction

Welcome to the Context to Call Business Squarespace 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.
- [Refer to Fig 1]



Welcome to
Context to Call



Fig 1 -Login

Sign In

Email Address *

Password *

☐ I'm not a robot



☐ Remember me

[Forgot Password?](#)

Don't have an account? [Sign Up](#)

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.[Refer to Fig 2]

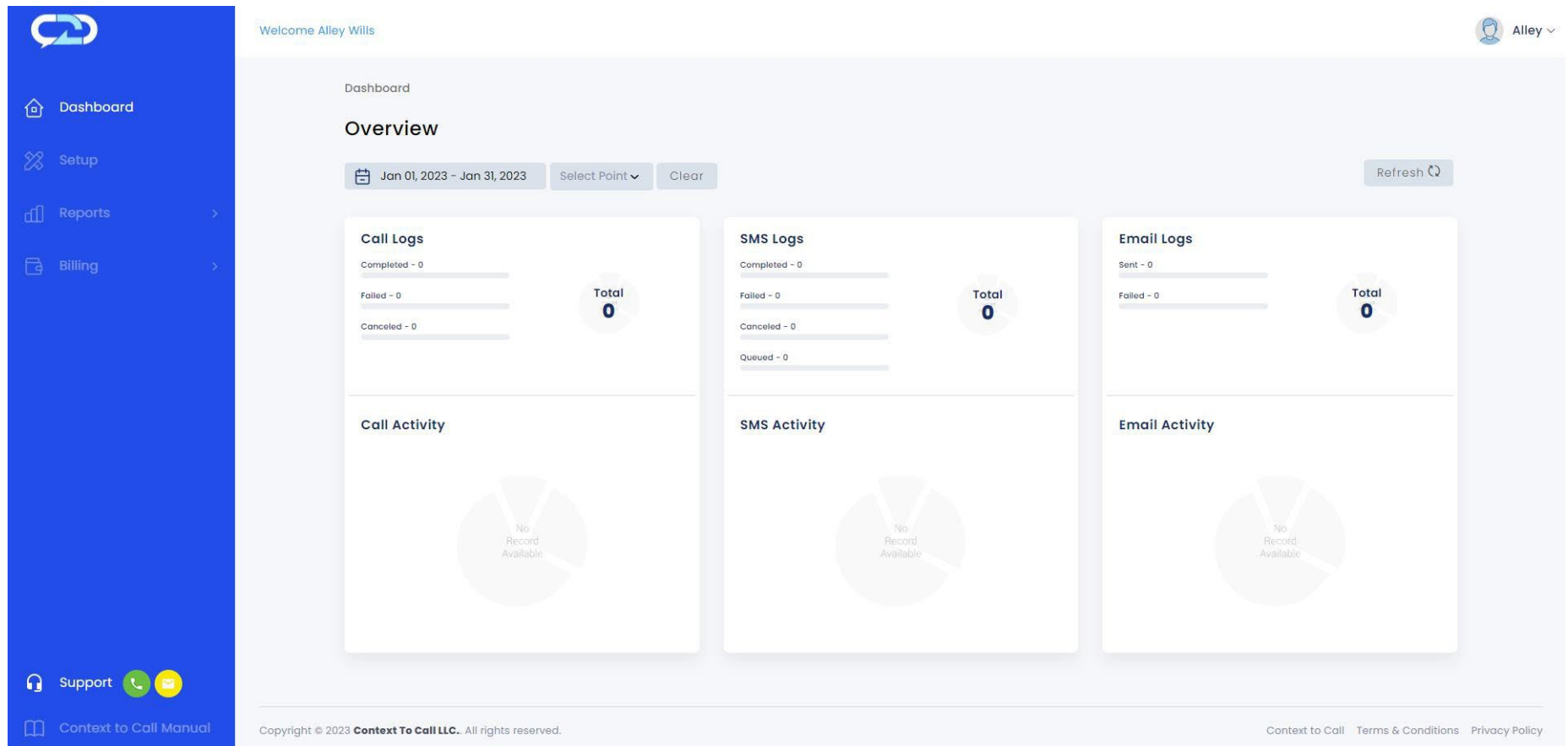


Fig 2 - Dashboard

Generate Context to Call Business Embed Code

Step 1: Accessing the Setup - Point Management

- Click on the “Setup” option located on the navigation menu. [Refer to Fig 3]

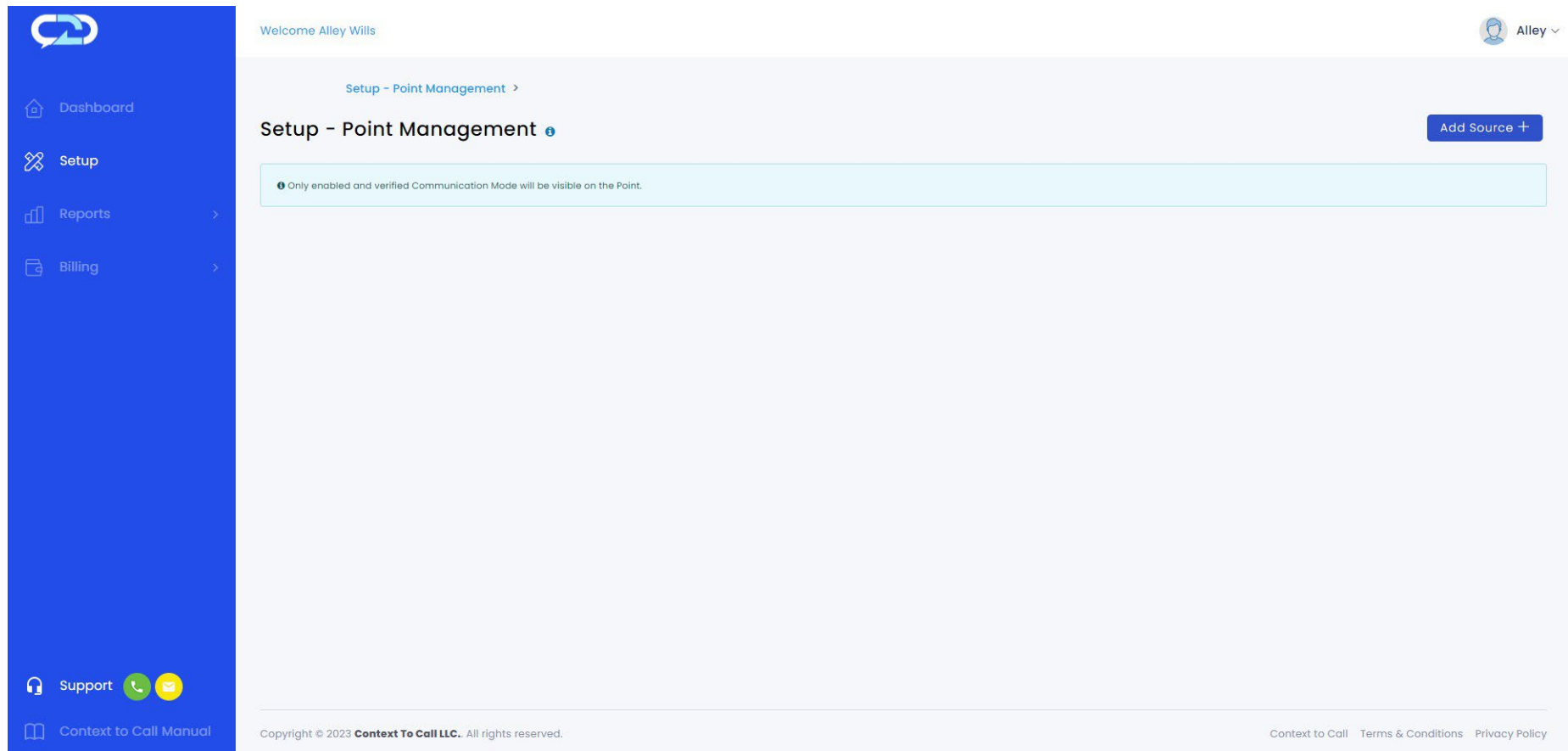


Fig 3 - Setup-Point Management

Step 2: Adding Source

The Source contains the Points added under it. The Source name refers to the website name. [Refer to Fig 4]
Example - If you have a website called “www.amazon.com”, you can name your source as Amazon.

- Click on the ‘Add Source’ button.

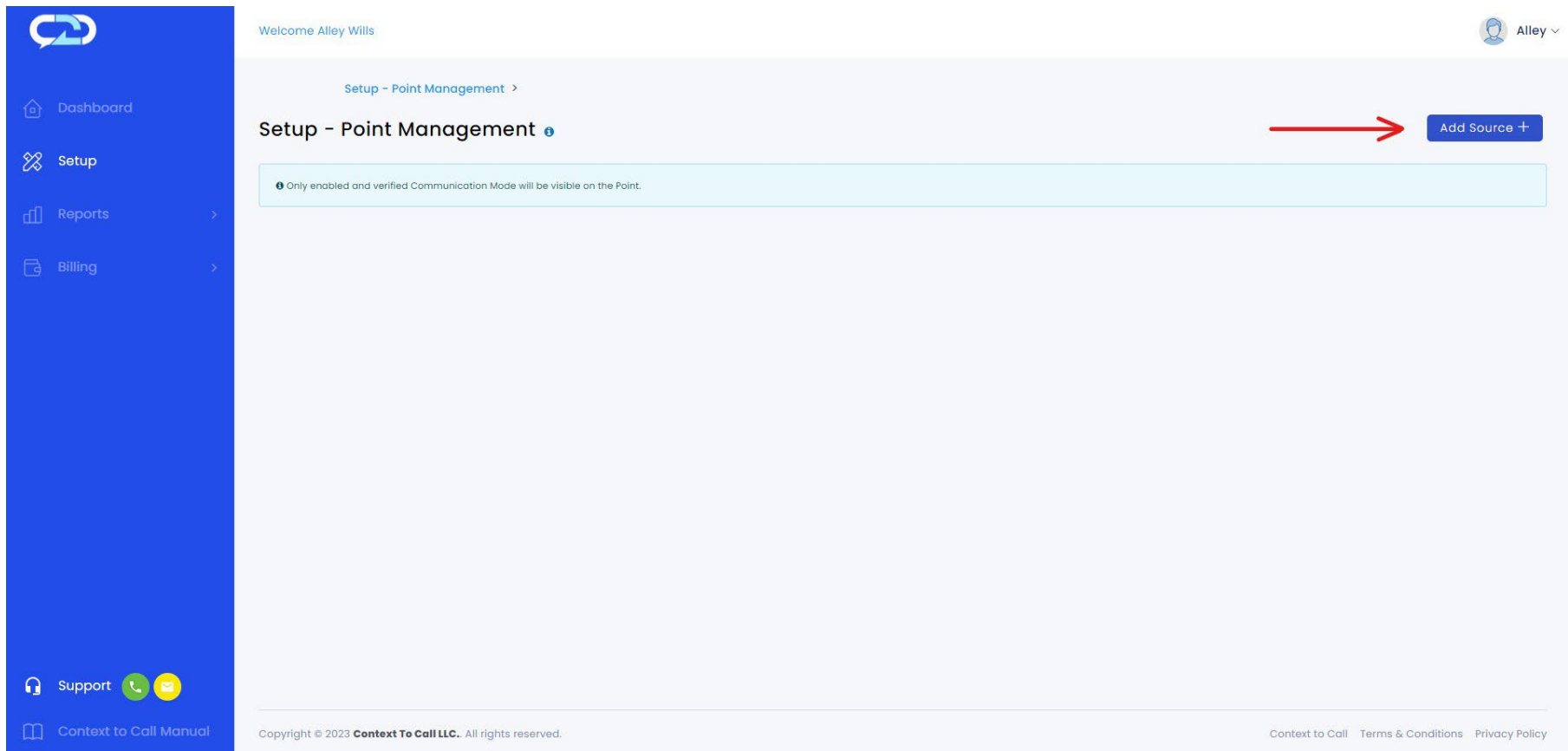
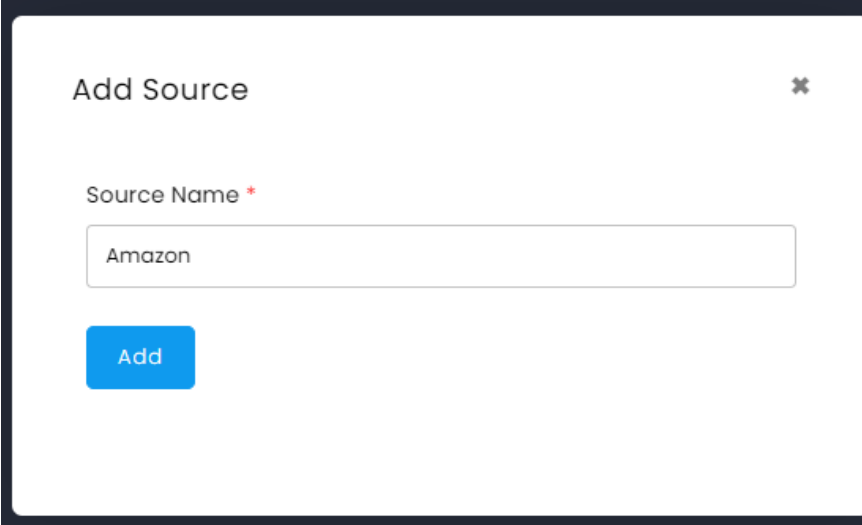


Fig 4 - Add Source Button

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



A dialog box titled "Add Source" with a close button (X) in the top right corner. It contains a text input field labeled "Source Name *" with the word "Amazon" entered. Below the input field is a blue button labeled "Add".

Fig 5 - Add Source

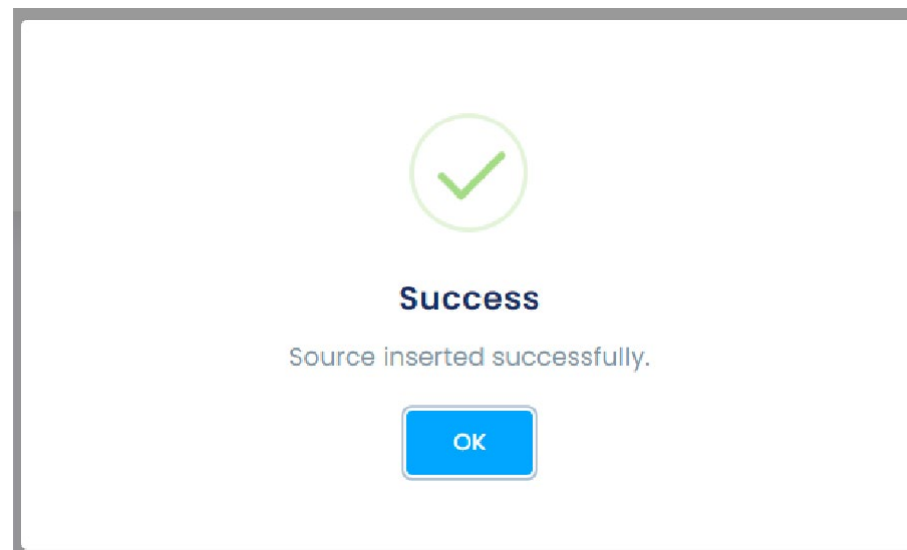


Fig 6 - Source Added

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. [Refer to Fig 7]

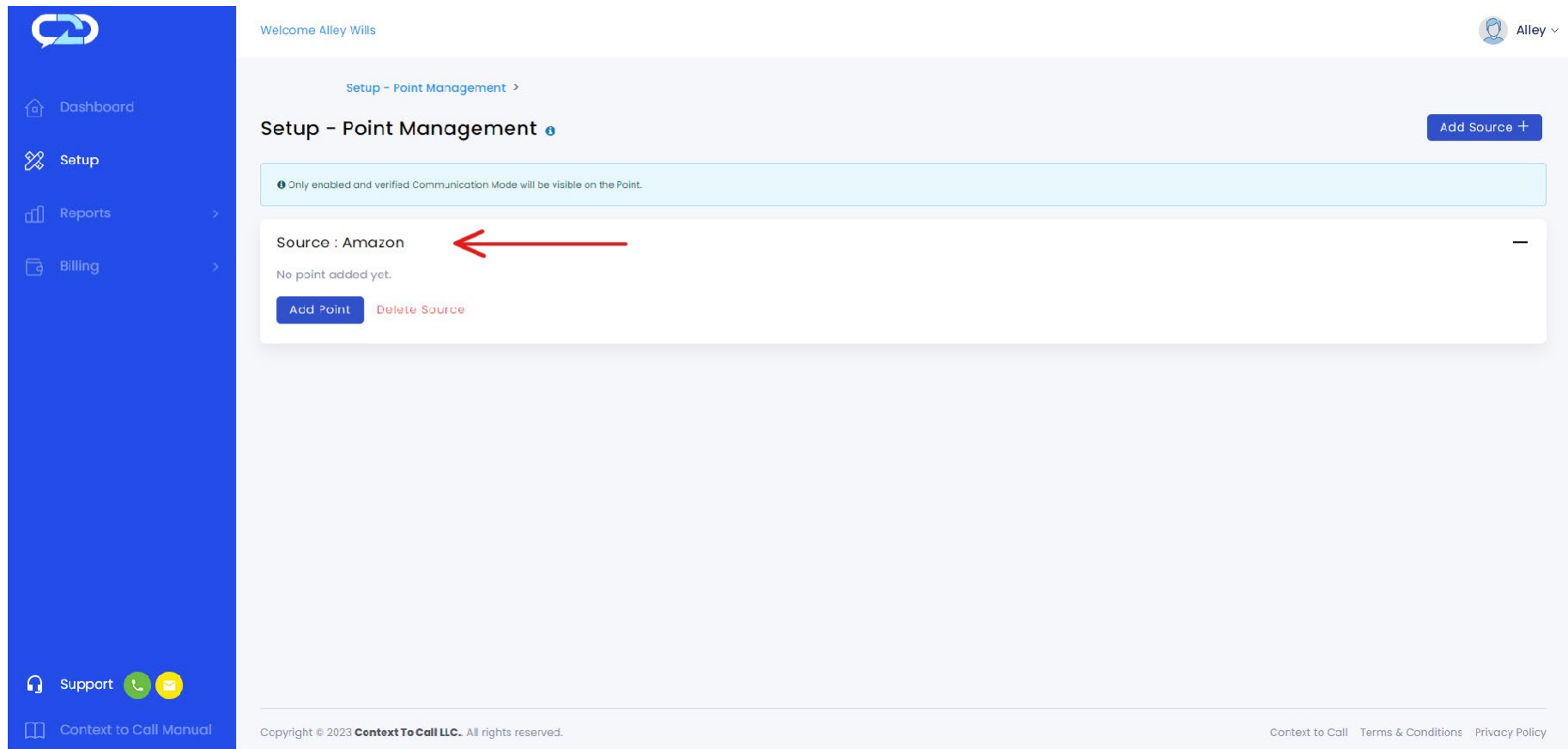


Fig 7 – Source: Setup - Point Management

- Click on the 'Add Point' button. [Refer to Fig 8]

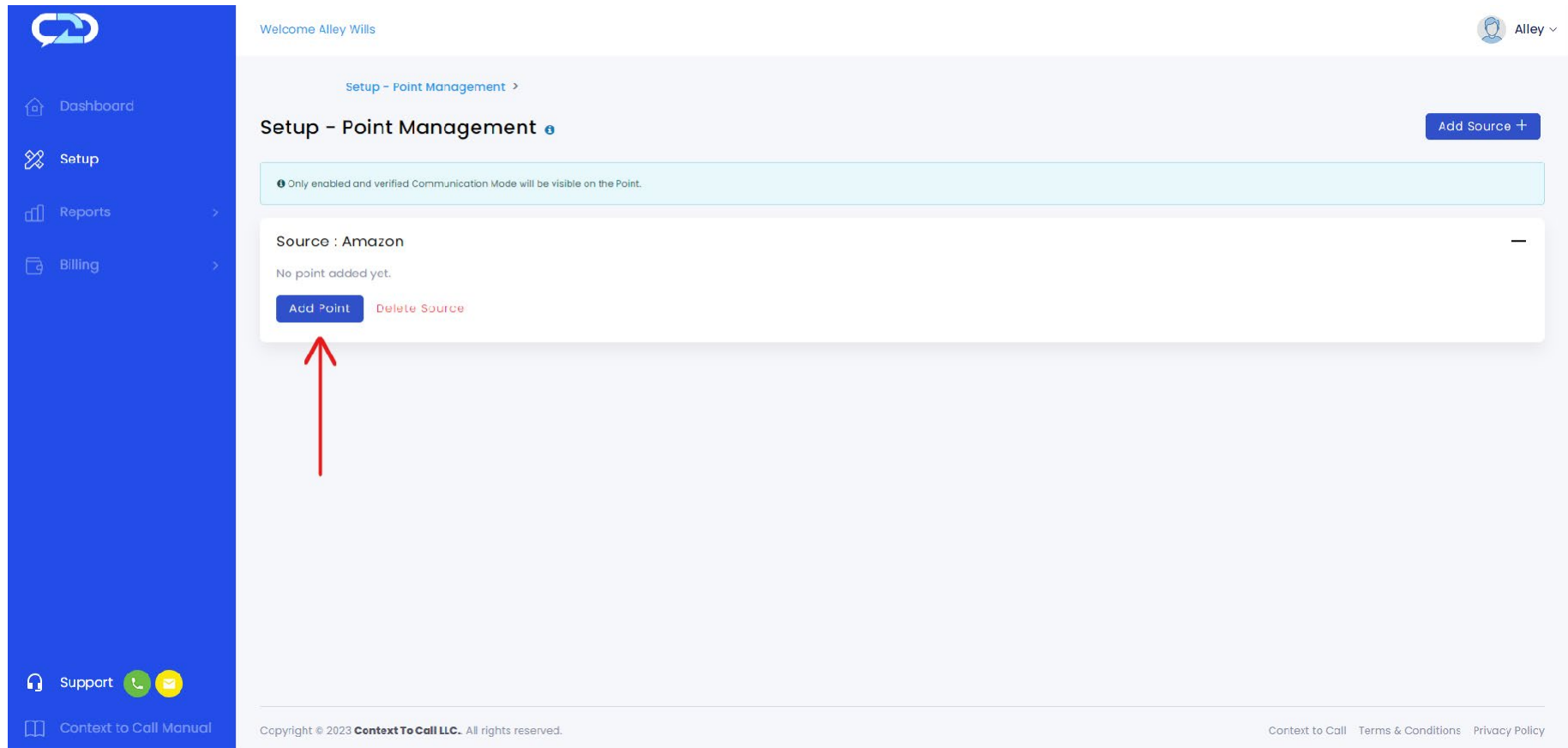


Fig 8 – Source: Add Point Button

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]

The screenshot displays the 'Point Details' page within the Context to Call application. On the left is a blue sidebar with navigation links: Dashboard, Setup, Reports, Billing, and Support. The main content area has a header with 'Welcome Alley Wills' and a user profile 'Alley'. Below the header is a breadcrumb trail: 'Setup - Point Management > Point Details'. The main form is titled 'Step 1: Point Info.' and contains the following fields:

- Source Name ***: A text input field containing 'Amazon'.
- Point Type ***: A dropdown menu with 'Select Point Type' and a downward arrow.
- Point Name ***: A text input field with a placeholder 'e.g. Home Page'.
- Select Mode(s) ***: Four checkboxes labeled 'All', 'Call', 'SMS', and 'Email'.

Below the checkboxes is a note: 'Above selected mode will be visible in your source'. An 'Add' button is located at the bottom right of the form. The footer contains copyright information: 'Copyright © 2024 Context To Call LLC. All rights reserved.' and links to 'Context to Call', 'Terms & Conditions', and 'Privacy Policy'.

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

Welcome Alley Wills

Alley

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://contexttocal.com'

Select Mode(s) * ☒ All ☒ Call ☒ SMS ☒ Email

Above selected mode will be visible in your source

Add

Fig 10 – Add Point: Global Point

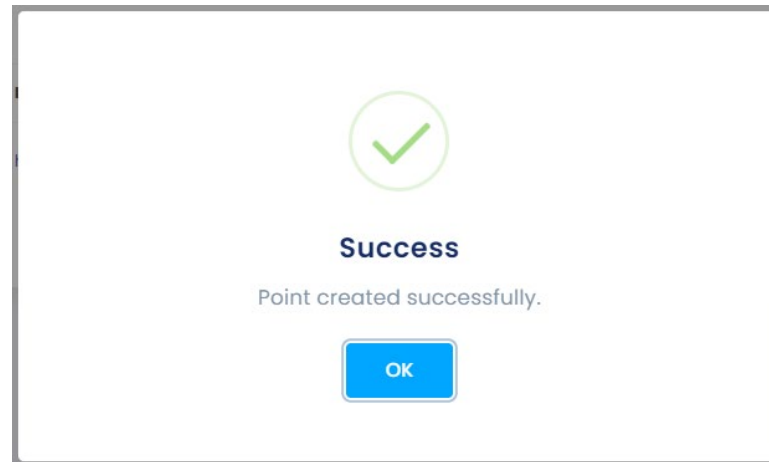



Fig 11 – Global Point Added

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.



Dashboard

Setup

Reports

Billing

Support

Context to Call Manual

Welcome Alley Wills

Alley

Setup - Point Management > Point Details

Step 1: Point Info.

Source Name *

Amazon

Point Type *

Website

Point Name *

Contact Us

Local/Global Point ⓘ

Local

Website Domain *

https://www.amazon.com/Contact Us

The full URL, e.g. 'https://contexttocal.com'

Select Mode(s) *

☒ All

☒ Call

☒ SMS

☒ Email

Above selected mode will be visible in your source

Add

Fig 12 – Add Local Point

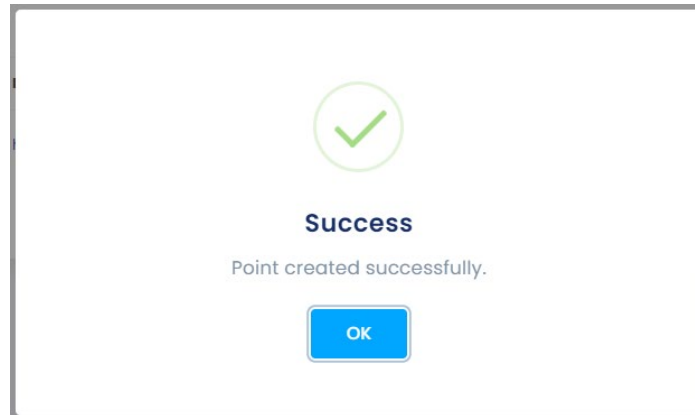


Fig 13 – Local Point Added

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

The screenshot displays the 'Setup - Point Management' section of a web application. The left sidebar contains navigation links: Dashboard, Setup, Reports, Billing, and Support. The main content area shows a table of points added under the 'Source: Amazon'. The table has columns for Point Name, Status, Destination, Call, SMS, and Email. Two points are listed: 'Contact Us' and 'Home Page'. Both points have a status of 'On' (indicated by a blue toggle) and a destination URL. The 'Contact Us' point is labeled 'Local Point' and the 'Home Page' point is labeled 'Global Point'. Both points have 'Call', 'SMS', and 'Email' communication modes enabled (indicated by eye icons). The 'Contact Us' point has a 'Verify' button and a trash icon. The 'Home Page' point also has a 'Verify' button and a trash icon. At the bottom of the table, there are buttons for 'Add Point' and 'Delete Source'.

Welcome Alley Willis

Setup - Point Management >

Setup - Point Management

Only enabled and verified Communication Mode will be visible on the Point.

Source : Amazon

Point Name	Status	Destination	Call	SMS	Email	
Contact Us	<input checked="" type="checkbox"/>	https://www.amazon.com/contactus				Verify
Home Page	<input checked="" type="checkbox"/>	https://www.amazon.com				Verify

Add Point Delete Source

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Fig 14 – Points Added under Source

Step 4: Points Verification

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

The screenshot displays the 'Setup - Point Management' page. On the left is a blue sidebar with navigation links: Dashboard, Setup, Reports, Billing, and Support. The main content area has a header with 'Welcome Alley Wills' and a user profile 'Alley'. Below the header is a breadcrumb 'Setup - Point Management' and a title 'Setup - Point Management'. A light blue banner states: 'Only enabled and verified Communication Mode will be visible on the Point.' Below this is a section for 'Source : Amazon' containing a table of points.

Point Name	Status	Destination	Call	SMS	Email	
Contact Us	<input checked="" type="checkbox"/>	https://www.amazon.com/contactus	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	<input type="button" value="Verify"/> <input type="button" value="Delete"/>
Home Page	<input checked="" type="checkbox"/>	https://www.amazon.com	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	<input type="button" value="Verify"/> <input type="button" value="Delete"/>

At the bottom of the table are buttons for 'Add Point' and 'Delete Source'.

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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.

Welcome Alley Willis

Setup - Point Management > Point Details

Step 1: Point Info.

Point Name:

Website URL:

Local/Global Point: ☒ Global

Status: ☒ Active

Icons: ☒ Call ☒ SMS ☒ Email

Step 2: Point Setting

Callback Form Fields

Call SMS Email

Name: ☒ Verification Required

Contact Number: ☒ Verification Required

Email Address: ☒ Verification Required

Message:

Step 3: Embed Code


[How To 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.



Welcome Alley Wills

Alley

Setup - Point Management > Point Details

Dashboard

Setup

Reports

Billing

Support

Context to Call Manual

Step 1: Point Info.

Point Name

Home Page

Website URL

https://www.amazon.com

Local/Global Point ⓘ

Global

Status

Active

Icons

☒ Call

Verify

☒ SMS

Verify

☒ Email

Verify

Update

Cancel

Step 2: Point Setting

Callback Form Fields

Call

SMS

Email

Privacy - Terms

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'.
- [Refer to Fig 18]

Call

IVR Verification

Country Code

Country Code

Enter Business number to call

Enter number

Ext.

Enter Ext.

Proceed

SMS

Verify Business SMS

Country Code

Country Code

Enter Business number to SMS

Enter number

Proceed

Email

Verify Email

Enter Business email address

Enter email address

Proceed

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]

Welcome Alley Wills

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:

<input checked="" type="checkbox"/> Call	<input checked="" type="checkbox"/> SMS	<input checked="" type="checkbox"/> Email
<div>Verified</div> <div>Change Number</div>	<div>Verified</div> <div>Change Number</div>	<div>Verified</div> <div>Change Email</div>

[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]

Welcome Alley Wills Alley

Step 2: Point Setting

Callback Form Fields

Call SMS Email

Name	<input checked="" type="checkbox"/>		
Contact Number	<input checked="" type="checkbox"/>	Verification Required	<input type="checkbox"/>
Email Address	<input type="checkbox"/>	Verification Required	<input type="checkbox"/>
Message	<input checked="" type="checkbox"/>		

Apply to All ☐ Update

Step 3: Embed Code

[How To Embed Code](#)

Place the following code in `html` of your application. Preferably in `index.html`

```
<script type="text/javascript" src="undefined"></script>
<script type="text/javascript">
  createPoint("660a6fe7d9496554afbc9c09","660e1e3fd94965344cbc6d76");
</script>
```

[Privacy](#) [Terms](#)

Fig 20 - Point Details: Step 2

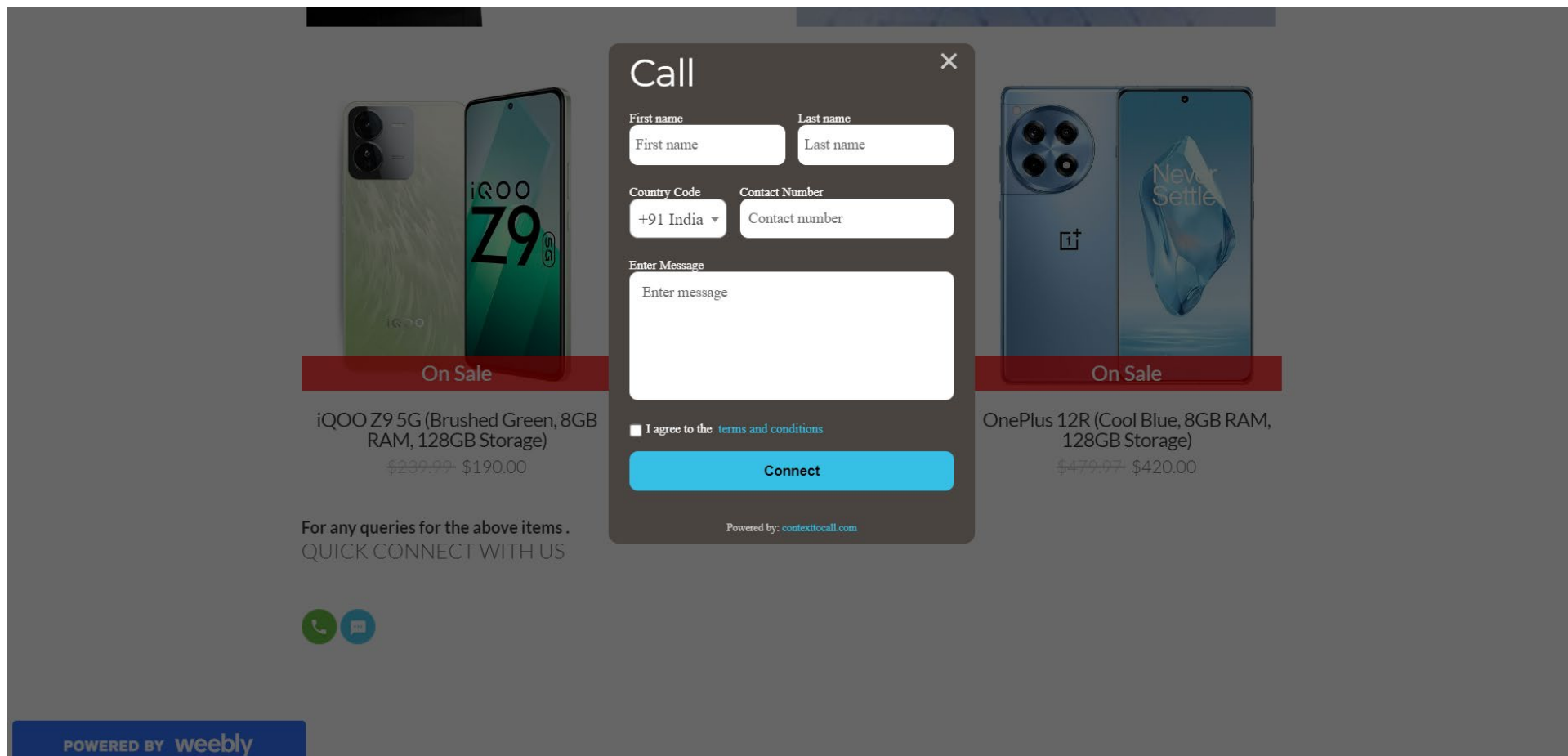


Fig 21 - Callback Form

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]

Welcome Alley Wills

Alley

Contact Number	<input checked="" type="checkbox"/>	Verification Required	<input type="checkbox"/>
Email Address	<input type="checkbox"/>	Verification Required	<input type="checkbox"/>
Message	<input checked="" type="checkbox"/>		

Apply to All ☐ Update

Step 3: Embed Code

[How To Embed Code](#)

Place the following code in `html` of your application. Preferably in `index.html`

```
<script type="text/javascript" src="undefined"></script>
<script type="text/javascript">
  createPoint("660a6fe7d9496554afbc9c09","660ele3fd94965344cbc6d76");
</script>
```

copy

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Fig 22 - Point Details: Step 3

Integrating Embed Code – Squarespace



Fig 23 - Square Space Logo

- Sign In to your Squarespace account “https://login.squarespace.com/”.
- **Note** – A premium Squarespace account is required to add the Embed code.
- Select your website from the list on the Dashboard.
- Click on the “Website” button to edit the selected website.

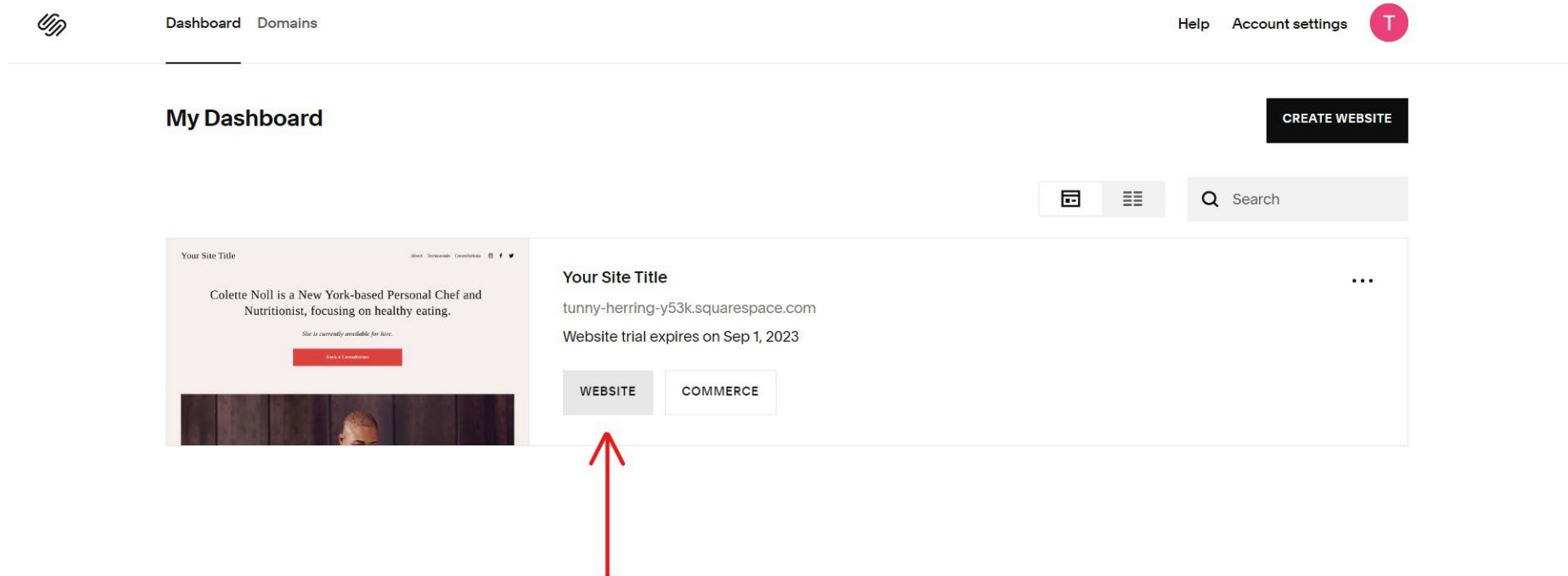


Fig 24 – Squarespace: Website Selection

- Click on the “Website” option from the left navigation panel.

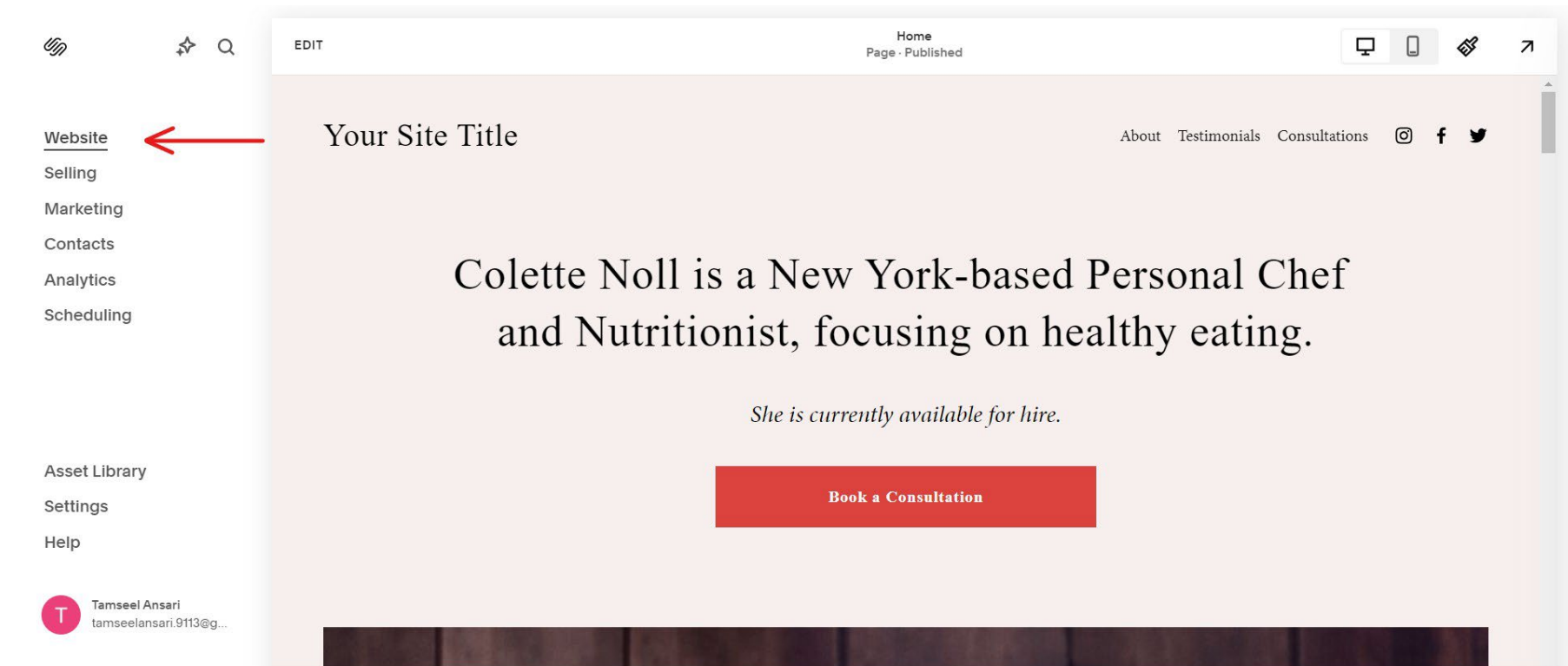


Fig 25 – Squarespace: Website Editor

- Select any page where you want to place the Context to Call Business Icon and click on the “Edit” button to open the Website Editor.

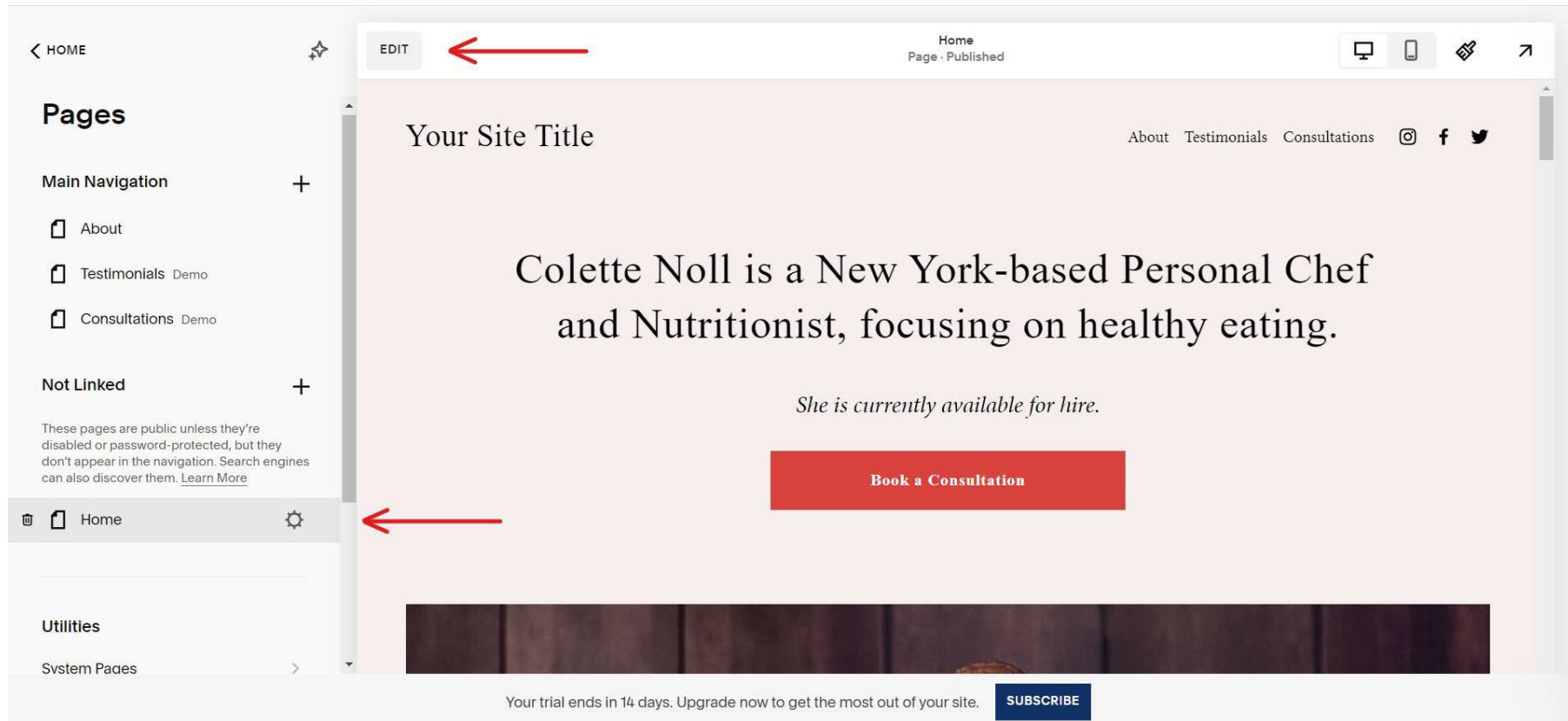


Fig 26 – Squarespace: Page Selection

- Click on the “Add Block” button where you want to place the Context to Call Business Icons.

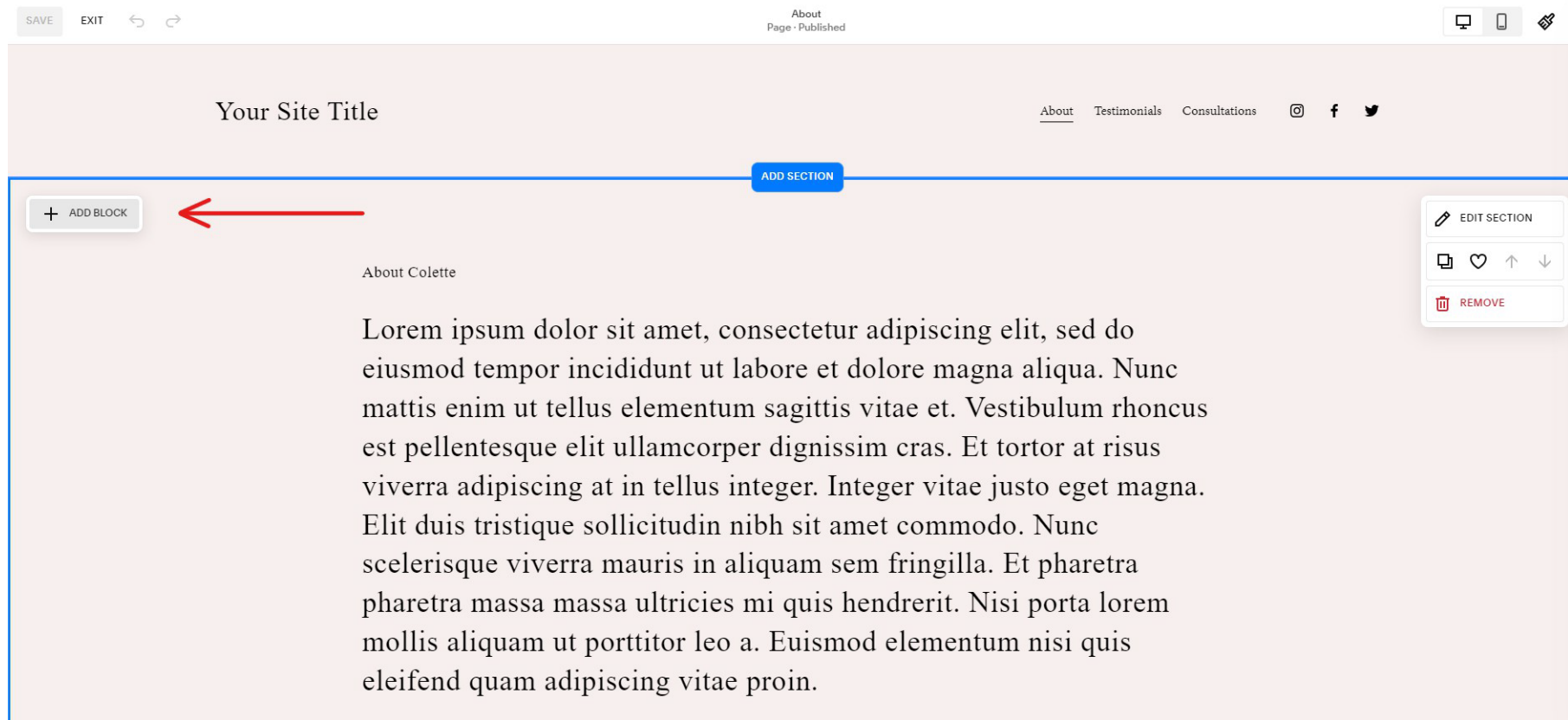


Fig 27 – Squarespace: Add Block

- Click on “Embed” and click on the “Edit” Icon.

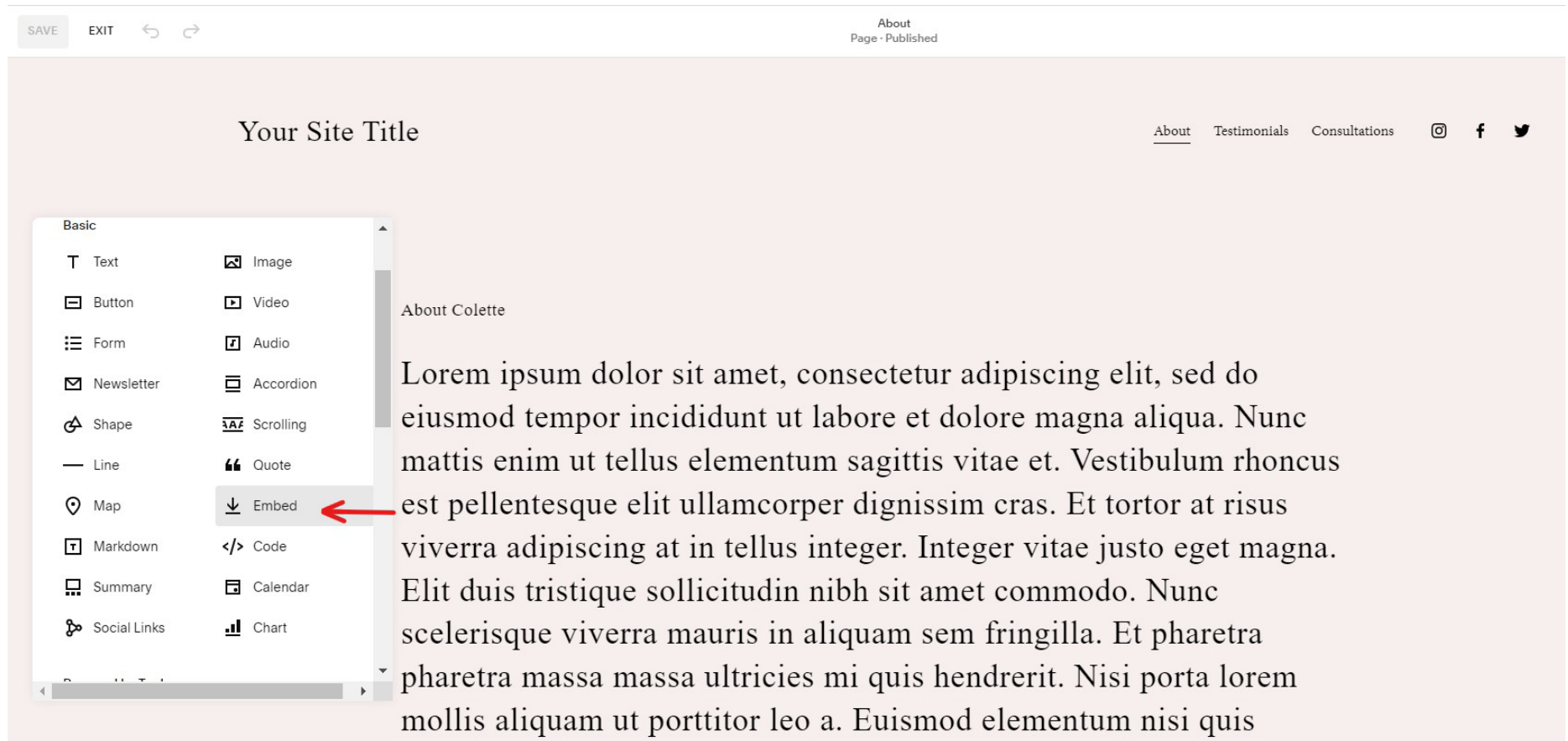


Fig 28 – Squarespace: Embed Code Option

- Select the “Code Snippet” tab and click on the “Embed Data” option.

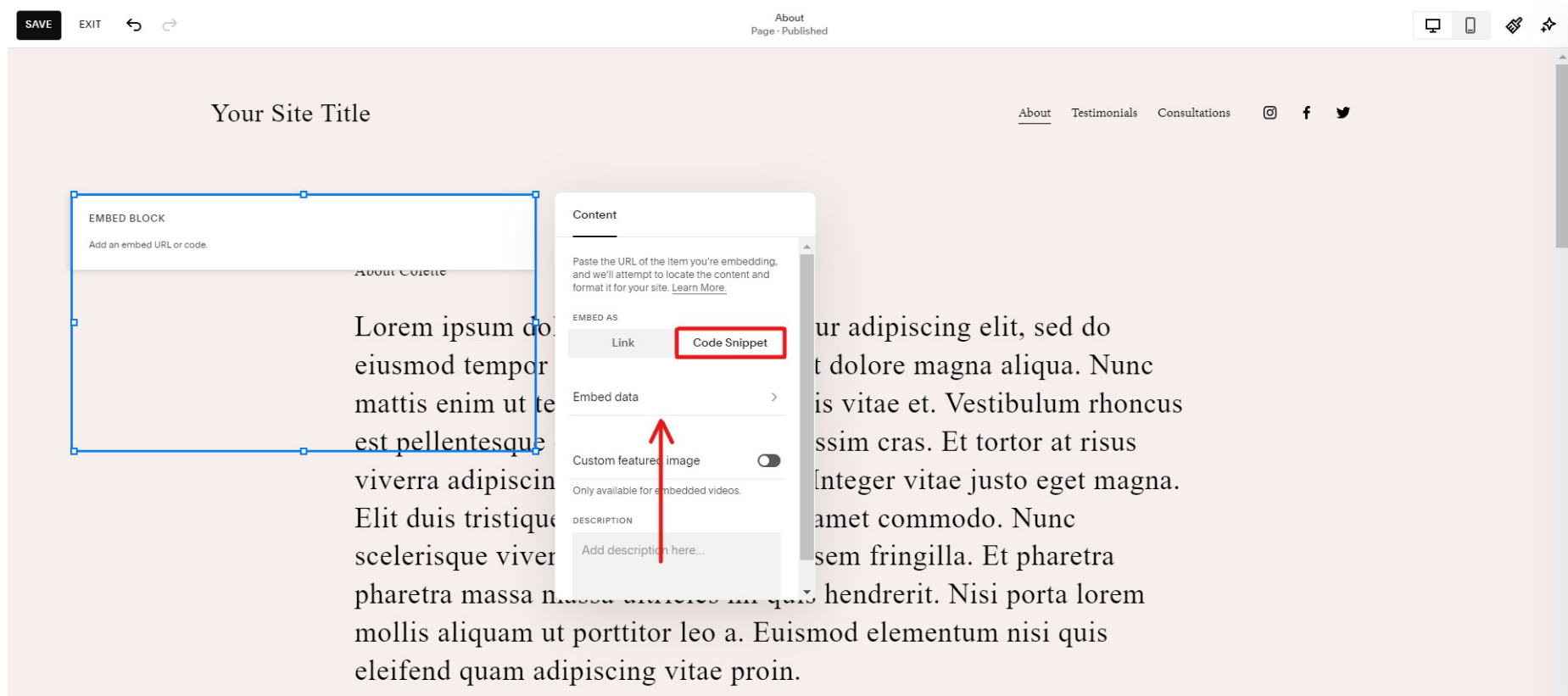


Fig 29 – Squarespace: Embed Code Snippet

- Paste the Context to Call Business Embed code in the editor.
- Click on the “Save” button to save the changes and publish your website.



Fig 30 – Squarespace: HTML Editor/Publishing

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

Welcome Alley Wills

Alley

Setup - Point Management > Point Details

Step 1: Point Info.

Point Name: Home Page

Website URL: https://gadgetollections.squarespace.com

Local/Global Point: ☒ Global

Status: ☒ Active

Icons:

- ☒ Call Verified [Change Number](#)
- ☒ SMS Verified [Change Number](#)
- ☒ Email Verified [Change Email](#)

[Update](#) [Cancel](#)

Step 2: Point Setting

Callback Form Fields

Fig 31 – Setup - Point management > Point Info.

- You can visit your website, the Context to Call Business Icons will display on the website.

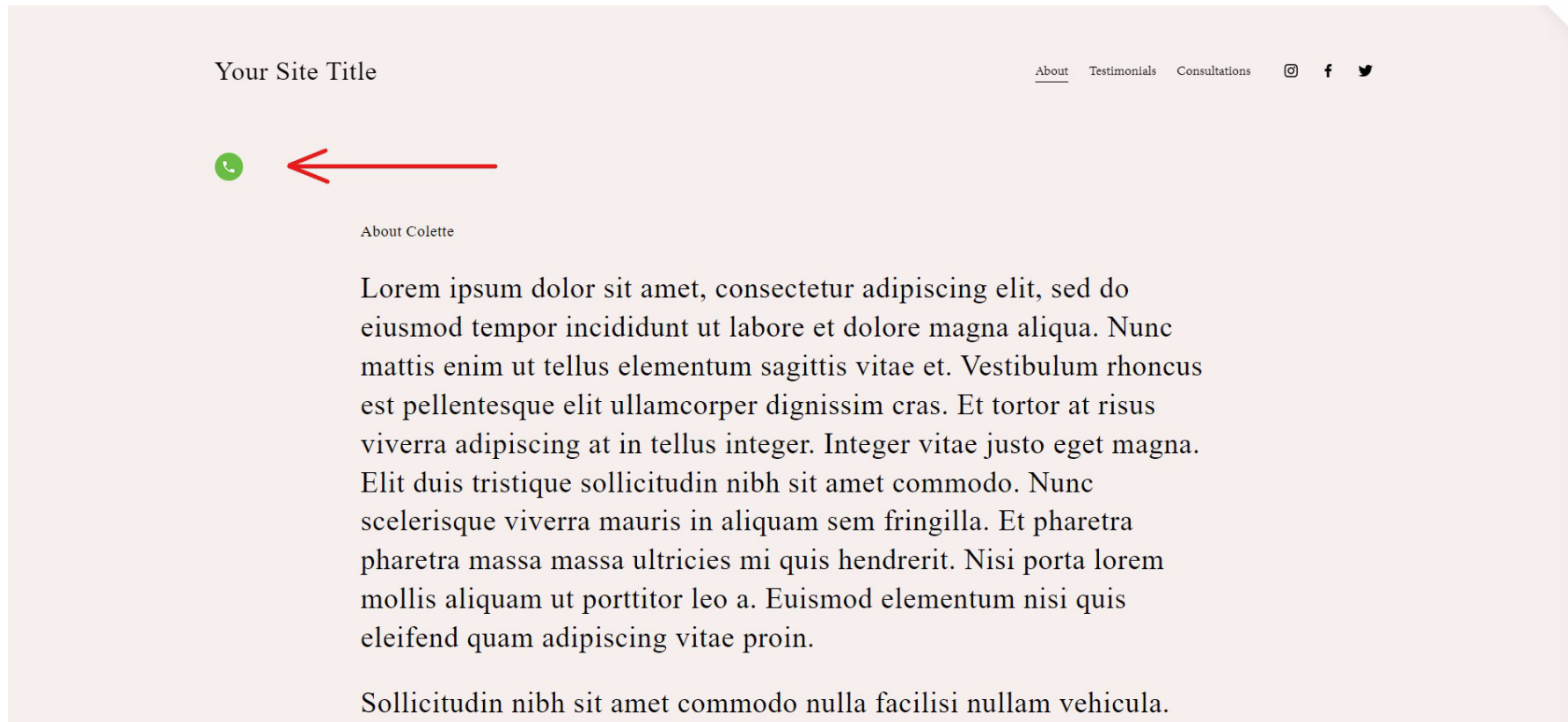


Fig 32 – Squarespace: Context to Call Icons