

## Empower Customers to connect directly to the appropriate staff/department right from your Team Bios or Contact Us page on your website

To configure a Widget to generate a one-on-one video call to a specific staff member

1. Sign in at <https://widget.magnifi.io/> and select **Settings / User Management** from the left Navigation column. This is where you will add Users who are authorized to answer incoming calls
2. Click on **+New Staff** button, and fill out the form.
  - a. Assign the person an initial password so they can sign in. They will be able to change this later.
  - b. Checkmark the option to “Email Credentials” to the person.
  - c. Leave the “Avatar” option blank
  - d. Click Save. Repeat for each person who is authorized to answer an incoming video call.
3. Create a New Widget configuration by clicking on Widget Management in the left navigation column and clicking on the +New Widget button

The screenshot shows the 'New Widget' configuration form with several red arrows pointing to specific elements:

- An arrow points to the 'Name your Widget configuration' label above the 'WIDGET NAME' input field.
- An arrow points to the 'ROOM TYPE' dropdown menu, which is currently set to 'Group'.
- An arrow points to the 'Call - Make inbound call requests.' option, which is selected with a checkmark. A label 'Select CALL functionality' is placed next to it.
- An arrow points to the 'MANAGERS WHO CAN USE THIS WIDGET' input field, with a label 'Type and select the people who are authorized to answer this video call'.
- An arrow points to the 'Change' button next to the 'ICON' (a magnifying glass icon), with a label 'Change the display icon'.
- An arrow points to the 'LOBBY BACKGROUND COLOUR' color picker, with a label 'Adjust lobby/meeting background colour'.
- An arrow points to the 'Save' button at the bottom right, with a label 'Save your Widget'.

The form includes sections for 'WIDGET FUNCTIONALITY', 'MANAGERS WHO CAN USE THIS WIDGET', 'Settings' (with an icon and lobby background color), 'Share Meeting Links' (with a message template and placeholders), and checkboxes for 'RECORD' and 'PROVIDE DIAL IN NUMBER FOR CALLS?'.

4. Proceed with the steps for how to embed your Widget in WordPress as outlined on <https://magnifi.io/wordpress-widget/>
5. For this use case, you will be embedding the Widget on your company Bios page, About Us, or Contact Us page, so that the public will have easy access to contact each specific team member.

6. Note that in this use case, each team member who requires a direct-call Widget configuration must be added as a “Manager who can use this widget.”
  - a. Once they have their own sign in credentials, each Manager must create their own direct-call configuration as per the instructions above, and they each must be exported and uploaded the Magnifi section on the WordPress dashboard.
  - b. Each Manager should include their name as part of their Widget Name, so the web designer knows which Widget configuration to associate with each staff member.
  - c. A staff member must be signed into the Widget Admin dashboard to accept a call. Missed calls will be redirected to a digital “leave a message” page.