

# The Magnifi Widget for WordPress: Set Up Guide

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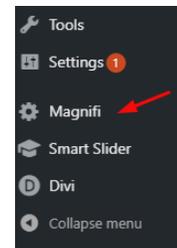
## First Steps/Installation/Registration

1. Install the WordPress Plugin. You can install the Plugin two ways:

- Visit <https://wordpress.org/plugins/magnifi-widget/> to download the Zip file. Then, on your WordPress dashboard, navigate to **Plugins/Add New**. Select **“Upload Plugin”**, choose the Zip file you just downloaded, and click on **“Install now”**. When installation is done, click **“Activate”**.
- **OR** within your WordPress Dashboard, navigate to **Plugins/Add New**. Search by keyword for **“Magnifi”**, then click **“Install Now”** on the Magnifi Widget. Once installed, navigate to **Plugins**, scroll to find the **Magnifi** Plugin, and click on **“Activate”**

2. Navigate to the Magnifi menu option in the left panel of your WordPress Dashboard.

- If you are not yet a Widget user, click on the link at the bottom: **Don't have an account? Register**. Registration includes signing up for a Widget Subscription, which is required to use the Widget.
- If you already have a Widget Subscription, sign in here using your email address and password.



### Magnifi Widget Settings

Preset Configurations	Preset Configuration Short Code	Preset Configuration Description
No Data		

Widget ID	Widget Name	Widget Short Code	User Management
No Data			

Email:

Password:

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

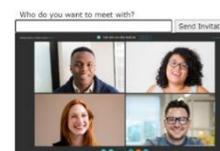
Click here to Register for a Widget account

- Once you have signed up for a Widget Subscription, return to the Magnifi tab on your WordPress Dashboard. Use the email and password you used for your Widget Subscription to Sign in on this tab. The Plugin will then download the full slate of Preset Widget Configurations to your WordPress account.

### Widget Preset Configurations

- The Magnifi Widget WordPress Plugin comes with pre-set configurations. Each one has an icon or interactive iframe that will be automatically embedded:

- Customer Support - Request Meeting:** An “incoming call” style configuration that allows people to call your staff for customer support. Missed calls are routed to a Request Meeting page where the caller can schedule a follow-up meeting with Customer Support at a time convenient for both.
- Customer Support - Message Form:** An “incoming call” style configuration that allows people to call your staff for customer support. Missed calls are routed to an online form where the caller can leave a typed message which will be delivered via email to the appropriate staff member.
- Customer Support - Redirect:** An “incoming call” style configuration that allows people to call your staff for customer support. Missed calls are routed to a specific webpage set by the meeting host.
- Instant Meeting:** Open a video window and invite attendees via SMS or email. This meeting takes place immediately.
- Schedule Meeting:** As meeting host, book a video meeting for a future date and time, and invite a group of attendees via SMS or email.



Who do you want to meet with?

Meeting:

Name:

Email Address:

Mobile Number:

Timezone:

When:

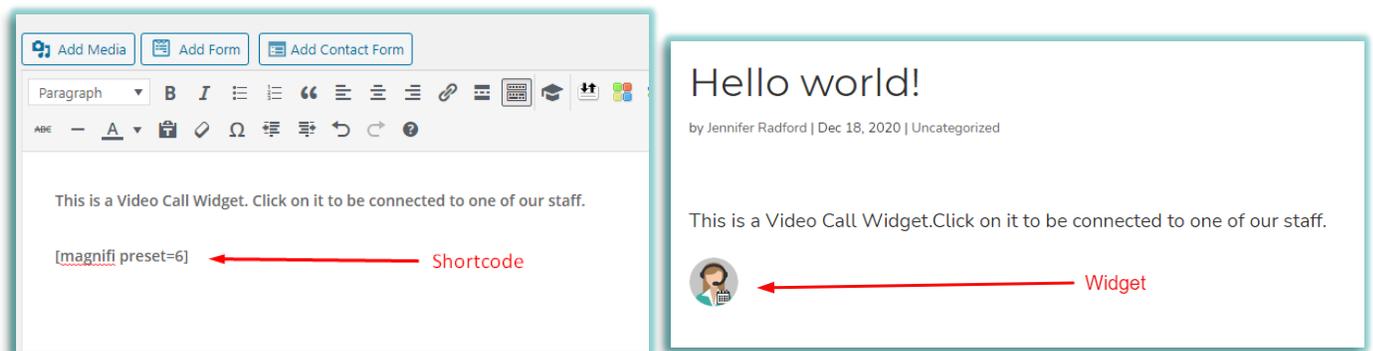
Month	Year	Day	Time
01	2021	01	09:00
01	2021	02	09:00
01	2021	03	09:00
01	2021	04	09:00
01	2021	05	09:00
01	2021	06	09:00
01	2021	07	09:00
01	2021	08	09:00
01	2021	09	09:00
01	2021	10	09:00
01	2021	11	09:00
01	2021	12	09:00
01	2021	13	09:00
01	2021	14	09:00
01	2021	15	09:00
01	2021	16	09:00
01	2021	17	09:00
01	2021	18	09:00
01	2021	19	09:00
01	2021	20	09:00
01	2021	21	09:00
01	2021	22	09:00
01	2021	23	09:00
01	2021	24	09:00
01	2021	25	09:00
01	2021	26	09:00
01	2021	27	09:00
01	2021	28	09:00
01	2021	29	09:00
01	2021	30	09:00
01	2021	31	09:00

- **Request Meeting:** Embed a public facing calendar on a webpage with a date & time selector. Clients/customers can use that calendar to request a future video meeting with a host. This option uses email only. (**NOTE: Requires Account Host to set their Availability before using. See Step 14 for more information**)



## Embedding the Widget on WordPress

5. Each Preset Configuration has a shortcode. The shortcodes are how you tell WordPress where to embed the Widget on the site, and which Widget to embed. Copy the Short Code for the Widget you'd like to embed.
6. On your Dashboard, navigate to the Page or Post where you'd like to embed the Widget.
  - You can drop the shortcode for the Preset Configuration in a code block or a paragraph block. Below left is an example of a shortcode typed into an Edit block in WordPress.
  - To the right is that same page as it looks once published, with the Preset Configuration of the Widget deployed and ready to use.



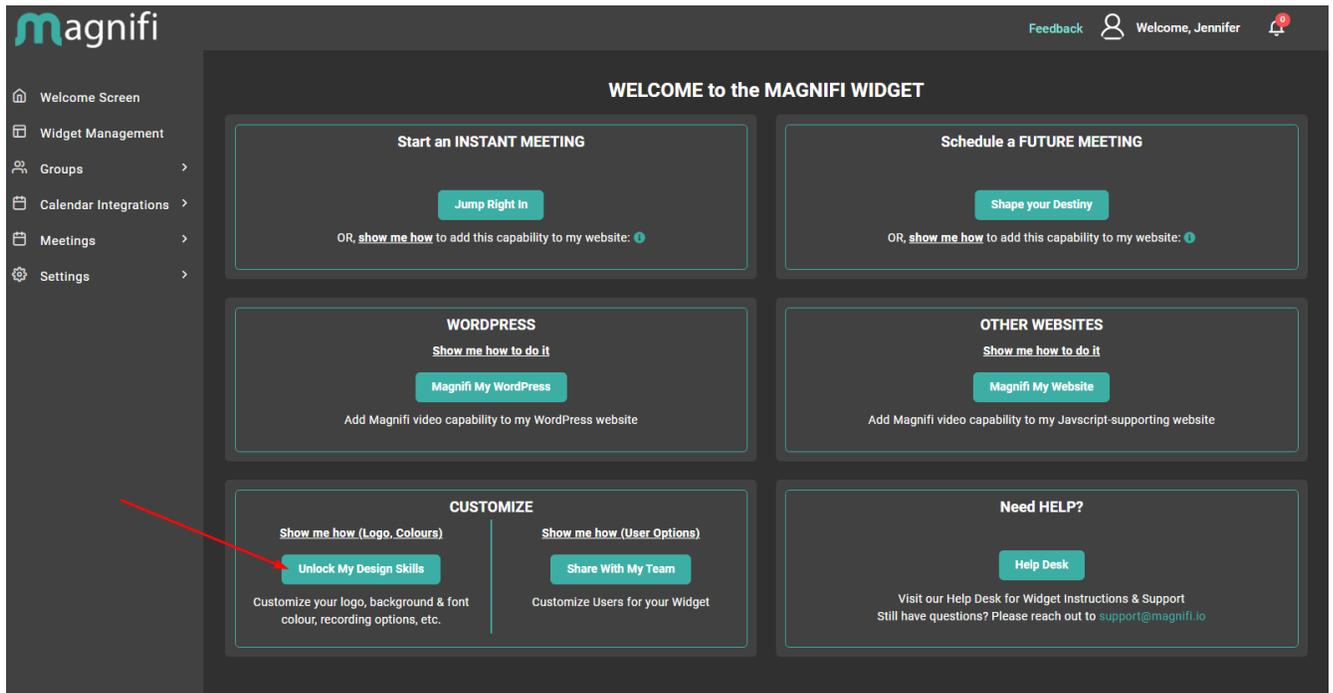
7. Widget location within a block can be further adjusted using Custom CSS. The ID for a Widget Preset Configuration is "**widget-preset-x**" (where x = the widget number assigned by WordPress on the Magnifi screen). In our example above, we used [magnifi preset=6] so the ID for that Widget for CSS purposes would be "**widget-preset-6**"

## Prerequisites and Customizations

8. Preset configurations include customization options which must be set in the Widget Admin interface. These customizations include:
  - Background colour of the Video Meeting and Lobby
  - Text colour of the Video Meeting and Lobby
  - Recording calls
  - Providing a dial number for meeting attendees who do not have access to a computer
  - For all Customer Support presets, the host can set how missed calls will be handled
  - For the Customer Support – Request A Meeting preset, the host must set their availability in the Widget Admin interface (see **Step 14** for more information)

## How-To (Basic Customizations)

9. Navigate to <https://widget.magnifi.io/> and sign in using your Widget Subscription credentials. After you sign in you will see the Welcome Screen.



10. Click on the **Unlock My Design Skills** button lower left section of page. This will take you to the Widget Management Screen where each of your Preset Configurations are listed. To perform Basic Customizations, choose the Preset Configuration you'd like edit and click on **Customize** under **Actions**

Name	Capabilities	Actions
 Customer Support - Message Form <i>Preset Name</i>	• Call - Allow inbound video calls.	<b>Customize</b> View Meetings Copy Embed Code

## Change Meeting Room and Lobby Background and Text Colours

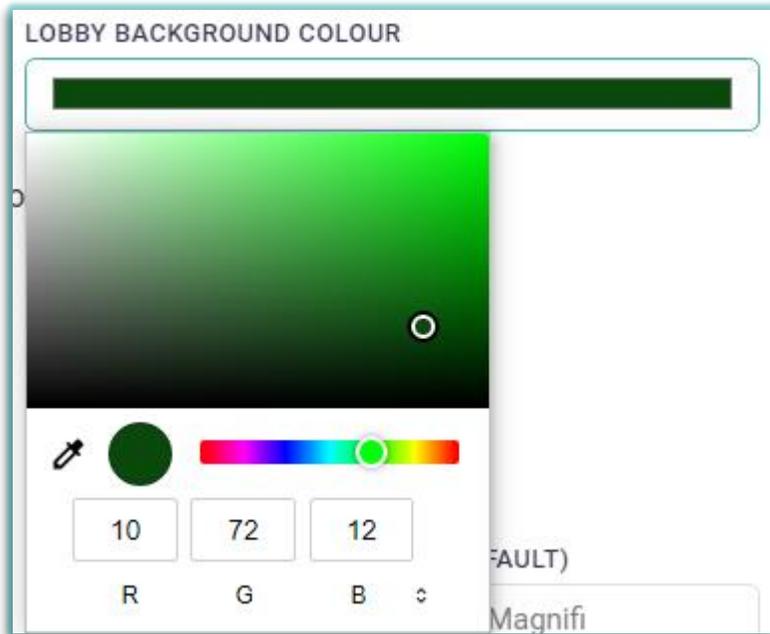
11. This will open the Edit view of the specific Preset Configuration. Scroll down until you come to the Settings section, where you can customize Meeting room Background and Text colours:

**Settings**

LOBBY TITLE COLOUR

LOBBY BACKGROUND COLOUR

Both of these options can be adjusted using a Colour Picker. User can enter the RGB codes for a colour, or choose a colour visually using the pointer and sliders.



### Set Recording and Dial-In Options

12. Scroll further down the Edit screen until you see a series of options with empty Checkboxes.
- To record the meeting, place a check in the **Record Meeting** box.
  - To ensure users without access to a computer can participate, place a check in the box beside **Provide Dial In Number For Calls**



### Set How Missed Incoming Customer Service Calls Are Handled

13. Right below the Recording Options are the **Missed Call Options**. Each of the three Customer Support Presets have the appropriate option preselected, so you don't need to change that.



However, the **Customer Support – Custom Redirect** preset requires that you provide a webpage URL. We've autofilled it with our website (<https://magnifi.io>), but you should replace that with the URL of the webpage you like your callers to be directed to in the event of a missed call

MISSED CALL ROUTING:  LEAVE A MESSAGE PAGE  CUSTOM REDIRECT  SCHEDULE A MEETING

URL  

Type the URL of the webpage you'd like your callers to be directed to in the event of a missed call.

**NOTE: Remember to click SAVE after you finish customizing.**

### Setting Host Availability (before embedding Request a Meeting configuration)

14. In order for the Request a Meeting configuration to function properly, the Account Host must first set their availability in the Widget Admin interface. Sign in at <https://widget.magnifi.io/>, then navigate to **Settings/Availability**. The settings default to “Unavailable”.

Weekly Recurring Office Hours <span style="float: right;">Edit</span>						
MON	TUE	WED	THU	FRI	SAT	SUN
Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable

Click on the **Edit** button to make changes, and click **Save** when you are done.

### Office Hours

Switch to AVAILABILITY

UNAVAILABLE  AVAILABLE

Select day of week

Day of Week

Select Start and end time of availability

Start Time

End Time

To add another entry, click +Add

Click Save when done

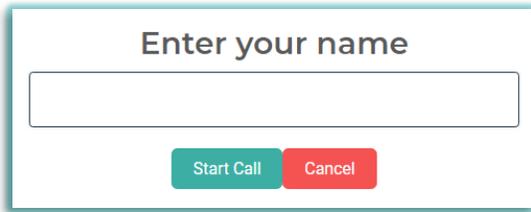
### Using the Widget after Embedding

#### Customer Support Presets

15. To use a **Customer Support** preset configuration:

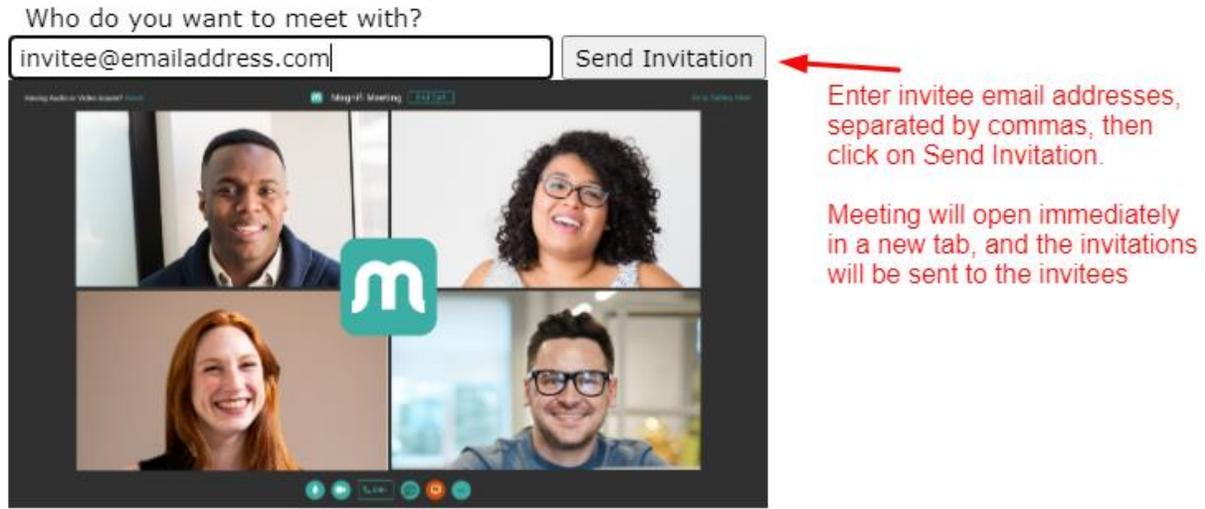
- **The Host must have the Widget Admin open in a tab on their computer, and be signed into the Widget Admin interface to receive a call.** Missed calls will be handled as specified by the preset.
- The caller clicks on the Widget icon on the live webpage.
- A small box will appear overlaid on the icon that says “VideoCall Us Now.”
- The caller clicks on that box to launch the VideoCall.

- Caller enters a name of their choice in the Name popup, and clicks on **Start Call**.



### Instant Meeting Preset

16. The Instant Meeting preset embeds with the following interactive image



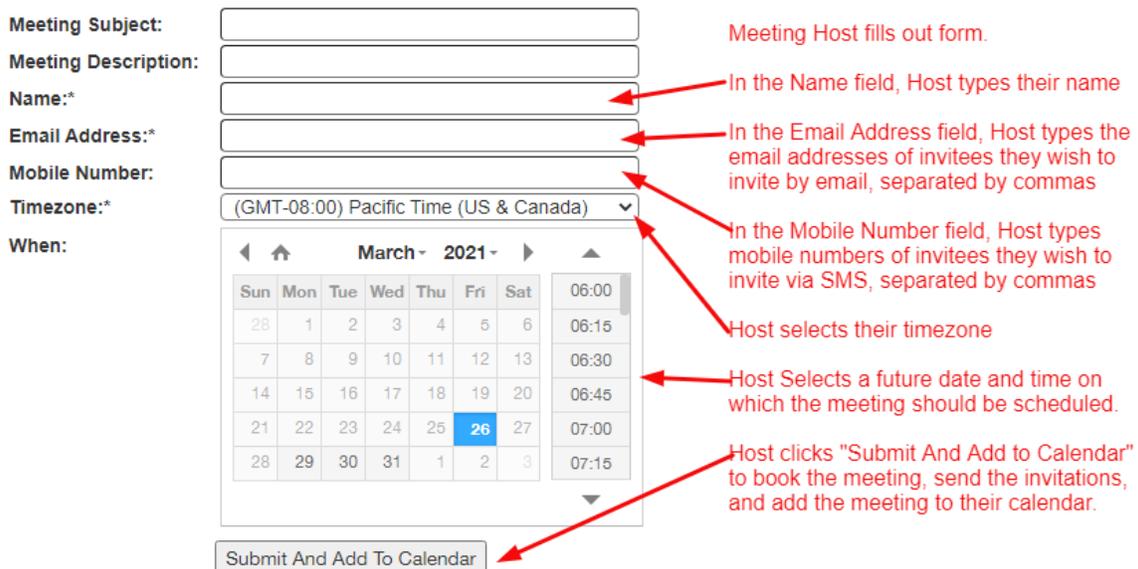
Who do you want to meet with?  
invitee@emailaddress.com Send Invitation

Enter invitee email addresses, separated by commas, then click on Send Invitation.

Meeting will open immediately in a new tab, and the invitations will be sent to the invitees

### Schedule Meeting Preset

17. The Schedule Meeting preset is intended to be embedded on an internal or password-protected page, allowing the Host to book a video meeting for a future date and time, and invite a group of attendees via SMS or email. It embeds with the following interactive calendar form:



Meeting Subject:

Meeting Description:

Name:\*

Email Address:\*

Mobile Number:

Timezone:\* (GMT-08:00) Pacific Time (US & Canada) ▼

When:

Submit And Add To Calendar

Meeting Host fills out form.

In the Name field, Host types their name

In the Email Address field, Host types the email addresses of invitees they wish to invite by email, separated by commas

In the Mobile Number field, Host types mobile numbers of invitees they wish to invite via SMS, separated by commas

Host selects their timezone

Host Selects a future date and time on which the meeting should be scheduled.

Host clicks "Submit And Add to Calendar" to book the meeting, send the invitations, and add the meeting to their calendar.

## Request a Meeting preset

18. The Request a Meeting preset embeds a public-facing calendar on a webpage with a date & time selector. Clients/customers can use that calendar to request a future video meeting with a host. This option uses email only. **NOTE: Host must have set their weekly availability (Settings/Availability) to use this form.** It embeds with the following interactive calendar form:

**Meeting:** Magnifi Meeting

**Name:\***

**Email Address:\***

**Mobile Number:**

**Timezone:\*** (GMT-08:00) Pacific Time (US & Canada) ▼

**When:**

Sun	Mon	Tue	Wed	Thu	Fri	Sat	
28	1	2	3	4	5	6	06:00
							06:15
7	8	9	10	11	12	13	06:30
14	15	16	17	18	19	20	06:45
21	22	23	24	25	26	27	07:00
28	29	30	31	1	2	3	07:15

Client/Customer fills in their Name, email address, mobile number (optional), and timezone, then selects their preferred date and time for the meeting.

The form only shows timeslots when the host is available.

Client/Customer clicks Submit, and request is submitted by email to the account Host