
eGain® Virtual Financial Coach

Getting Started Guide

Getting Started Guide for eGain® Virtual Financial Coach, March 22, 2021 8:33 AM

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1. Details Required to Launch the Virtual Financial Coach

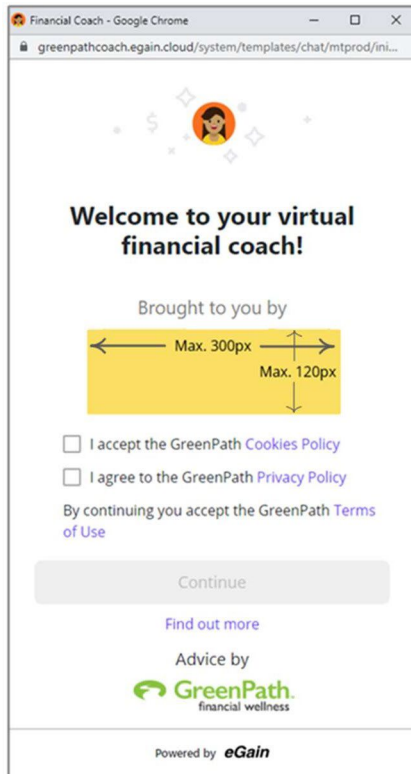
To launch the Virtual Financial Coach, we will need the following details:

Item	Information		Notes
Contact details for the support/maintenance contact			
<i>The support contact will be sent details of scheduled maintenance and will be able to raise support tickets with eGain.</i>			
Name			
Email address			
Telephone number			
Virtual Financial Coach Launch Locations			
URL	Page Name ¹	Estimated page traffic	Date of launch

¹ If you have multiple pages, please include the names you use to refer to the pages (for example [https://wwwcom/resoures/creditscore.html](https://www....com/resoures/creditscore.html) might be known as “Credit Score”).

2.Brand the Virtual Financial Coach

The Virtual Financial Coach splash page can be branded with your logo. Please supply a suitable logo in PNG or SVG format, resized not to exceed 300 px wide, 120 px tall.



3.About the Offer for the Virtual Financial Coach

The Offer for the Virtual Financial Coach is a small pop-up overlay that can be added to your website pages to offer the Virtual Financial Coach to your users. The coach offer is responsive and displays differently depending on the browser size.



It has the following elements:

- Heading:** The first piece of text, usually in a larger font – **Chat with Coach Lea**
- Text:** The main message, used to introduce the coach

- ❑ **Get Started button:** to start interaction with the Virtual Financial Coach
- ❑ **Find out more button:** Provides details about the Virtual Financial Coach

OFFER VIEW ON DESKTOP

TransUnion Coach





Curious about your credit score?

Meet eCoach Lea. She can give you your credit score and a personalized plan to strengthen your credit.

[GET STARTED](#) [Find out more](#)

Advice by GreenPath | Powered by eGain

Standard Coach



Meet your virtual financial eCoach

eCoach Lea offers automated financial advice 24/7. It's fast and customized just for you. Check it out!

[GET STARTED](#) [Find out more](#)

Advice by GreenPath | Powered by eGain

4. Customize the Offer





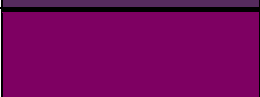
The offer can be customized to suit your website pages. You can also specify different versions to appear for mobile and desktop users. For example, you may want to size the text differently or position the offer in a different place.

The following elements of the offer can be changed.

Desktop Offer Customizations

Element	Allowed changes	Default value or example	New value
Position of offer on the page			
Color For Headline and Buttons	Color options: See color palette	Black	

Color Palette

Black		#000000
Ship Gray		#434347
Crimson		#C8102E
Aqua green		#004F39
Catalina blue		#0B4186
Orient blue		#004E82
Denim blue		#1971B6
Purple		#572C5F
Eggplant		#7F0063

5. Prepare Your Website to Launch the Coach Offer

The offer is launched using the **eGain OneTag**. OneTag is a snippet of JavaScript code that is added to website pages. It enables us to add and manage the Virtual Financial Coach Offer. OneTag downloads the scripts needed to offer the coach from eGain Cloud and collects reporting data regarding interactions with the offer – how many users accept or reject.

OneTag will not impact website page loading times. There will be no impact on the overall user experience. OneTag injected scripts are cached on the browser for one day.

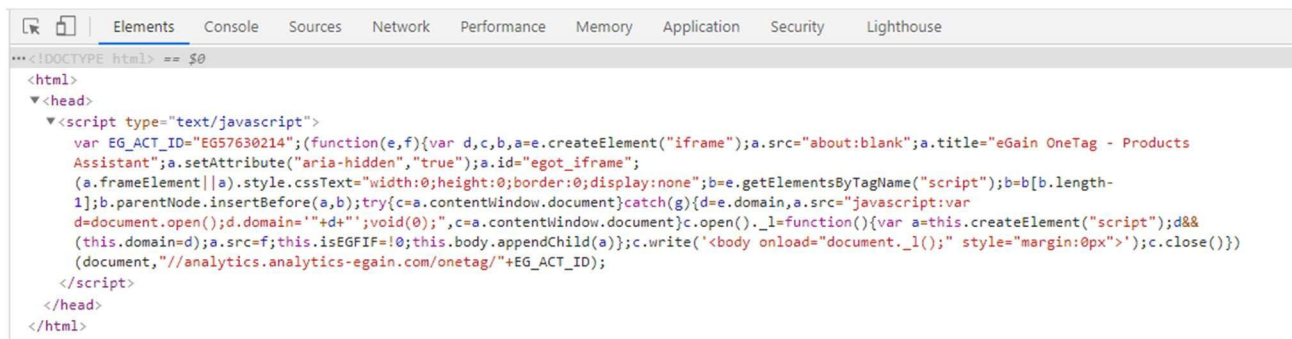
How do we Include OneTag to our Website?

Copy the script from the text file available at:

<https://eg-onetag-distribution.s3-us-west-2.amazonaws.com/CoachOneTag.txt>

Add the script to the page where you want to present the **Virtual Financial Coach** Offer. Add the OneTag script just before the `</head>` tag of the page(s). It can be added in a common header file included in all pages.

It will look like this:



```
...<!DOCTYPE html> == $0
<html>
  <head>
    <script type="text/javascript">
      var EG_ACT_ID="EG57630214";(function(e,f){var d,c,b,a=e.createElement("iframe");a.src="about:blank";a.title="eGain OneTag - Products Assistant";a.setAttribute("aria-hidden","true");a.id="egot_iframe";(a.frameElement||a).style.cssText="width:0;height:0;border:0;display:none";b=e.getElementsByTagName("script");b=b[b.length-1];b.parentNode.insertBefore(a,b);try{c=a.contentWindow.document}catch(g){d=e.domain,a.src="javascript:var d=document.open();d.domain="+d+"";void(0);",c=a.contentWindow.document}c.open()._l=function(){var a=this.createElement("script");d&&(this.domain=d);a.src=f;this.isEGFIF=!0;this.body.appendChild(a);c.write("<body onload="document._l();" style="margin:0px">');c.close()}}(document,"//analytics.analytics-egain.com/onetag/"+EG_ACT_ID);
    </script>
  </head>
</html>
```

Adding the script will not alter the appearance of your web page.

Using Chrome, you can confirm the script can establish a connection with the eGain cloud systems in the network tab of the developer tools (F12). You will be able to see the OneTag Token in the list:

eGain will test the OneTag Token is working as expected and issue a **live OneTag Token** to add into the OneTag script (to replace the test token, shown in bold).

```
<script type="text/javascript">var EG_ACT_ID="EG57630214";
```

Once your live OneTag Token is in place and the coach is ready to launch we will activate the offer. The offer will then appear on the web page(s).

6. What's Next?

1. Supply your contact details, logo and desired launch date.
 2. Send the details of any customizations to the Offer.
 3. Let us know the URL(s) of the page(s) you would like the Offer to appear on, along with estimated page traffic. If the page is behind an authentication screen, please provide a test login to enable us to test the offer.
 4. Confirm that the test OneTag script is added to your website.
 5. After you share the Offer changes and confirm that you have added the test OneTag script on your website, eGain will setup and test your **Virtual Financial Coach** Offer.
 6. eGain will then supply a **live OneTag Token** to add into the OneTag script (to replace the test token, shown in bold). Once this step is completed, the **Virtual Financial Coach** offer can be activated on your website.
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