



SavvyChat

Free Chat & Text for Your Dealership

Quick Start Guide

For dealership admins & staff

Live in 5 minutes

Every lead -> CRM

No credit card

No contract

savvydealer.com/savvy-chat portal.savvydealer.com

(c) Savvy Dealer - Quick Start Edition

Welcome to SavvyChat

SavvyChat is the free chat & text platform built for car dealerships. Customers chat live with your team or drop their phone number for a text follow-up — and every lead lands in your CRM.

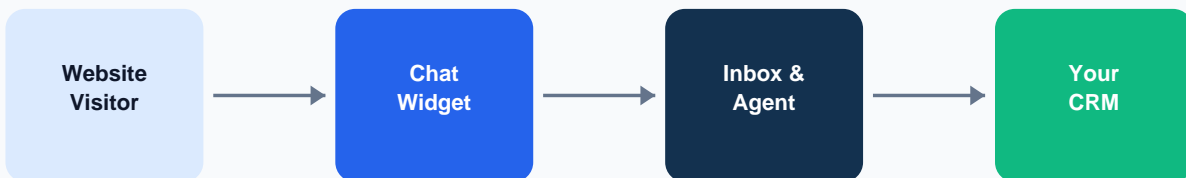
This guide takes you from **sign-up** to **live on your website** in five steps. Plan on 5–10 minutes of your time, plus a few minutes for your website provider to drop the snippet in.

TIP

Need every screen explained? See the companion **Full Walkthrough** PDF for a deep tour of every tab, role, and feature.

How leads flow

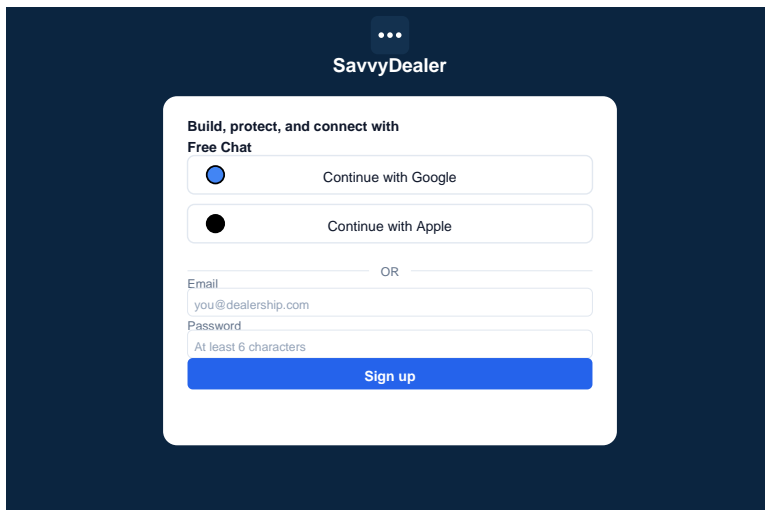
A visitor opens the chat widget, talks with your team (or asks to be texted), and the conversation pushes straight into your CRM as a lead. Your BDC works it from inside the CRM they already use.



Every chat & text-capture lead flows straight to your CRM.

Step 1 - Create your account

Go to portal.savvydealer.com and sign up. The fastest way is **Continue with Google**. **Continue with Apple** works the same way for Apple ID users. Or sign up with a plain email and password if you prefer.



The screenshot shows the SavvyDealer sign-up interface. At the top, it says "SavvyDealer" with three dots above it. Below that, the text reads "Build, protect, and connect with Free Chat". There are two options for signing up: "Continue with Google" (selected with a blue radio button) and "Continue with Apple" (with a black radio button). Below these is an "OR" separator. The form includes fields for "Email" (with the placeholder "you@dealership.com") and "Password" (with the requirement "At least 6 characters"). A blue "Sign up" button is at the bottom.

NOTE

No credit card. No trial. No contract. SavvyChat will never ask for payment to use chat & text.

Step 2 - Set up your dealership

Right after sign-up the portal puts you on the **Create Dealer** screen. Fill in four fields:

Dealer Name — how your dealership appears in the chat header. **Contact Email** — the first admin login for the dealership. **Website URL** — the domain where the widget will live (add more domains later).

Website Provider — pick from 20+ supported providers (DealerInspire, Dealer.com, DealerOn, DealerFire/Sincro, fusionZONE, Team Velocity, and others). We email them the install snippet so you don't have to chase your web vendor.

Create Dealer

Nick Chivinski
Multi-Site Admin

1 User Created 2 **Dealership setup** 3 Widget Config Setup 4 Provider Notified 5 Chat Live

Create New Dealer

We'll create the first admin user automatically.

Dealer Name *

Contact Email *

Website URL *

Website Provider

Step 3 - Configure the widget

This is where SavvyChat goes from generic to *yours*. The **Widget Configuration** screen has a Text/Chat feature card (active by default) and five tabs:

The screenshot displays the 'Widget Configuration' screen for 'Savvy Dealer'. The interface includes a sidebar with navigation options like 'Setup', 'Overview', 'Platform Management', 'Management', 'My Dealership', 'Security', and 'Account'. The main content area shows a progress bar with five steps, with the third step, 'Widget Config Setup', currently active. Below the progress bar, there are two feature cards: 'Text / Chat' (Active) and 'Finance Calculator' (Disabled). The configuration area is divided into tabs: 'Config', 'Chat Settings', 'Working Hours', 'Lead Form', and 'Embed Code'. The 'Config' tab is selected and shows sections for Location, Contact Us, Lead Generation Configuration, and Branding. The 'Live Preview' section on the right shows a chat widget with a 'Chat with us' button, a 'START A CONVERSATION' section with input fields for Name, Email, and Phone, and a 'Submit' button.

The Config tab — Location, Contact Us, Lead Generation, and Branding sections side-by-side with the Live Preview.

| | |
|----------------------|--|
| Config | Location (address, lat/Ing, “Open in Maps”), Contact Us (phone, email), Lead Generation mode (Lead Form + Chat / Lead Form Only / Chat Only), and Branding (three color pickers, widget position, logo URL). |
| Chat Settings | Chat Title, Assistant Name, Welcome Message, Offline Message, Enable AI Auto-Response, and Thank You Message. |
| Working Hours | Timezone selector plus Mon–Sun grid with Open toggle, Start/End times, and an optional note (e.g. “Holiday hours”). |
| Lead Form | Form Heading, Description, Button Text, and a per-field Visible/Required toggle for Name, Email, Phone, Question. |
| Embed Code | The script tag for your site — Copy to Clipboard button included. |

TIP

Watch the **Live Preview** on the right as you make changes. Color, copy, lead mode — everything updates in real time so you can dial in the exact look before you save.

Step 4 - Snippet gets installed

When you save the widget config, SavvyChat emails the install snippet to your website provider automatically. They drop it on your site — usually within a day or two. If you self-host or want to install it yourself, grab it from the **Embed Code** tab in the configurator:

```
install-snippet.html

<!-- Paste before </body> -->

<script src="https://cdn.savvydealer.com/widget.js" data-dealer="..." async></script>

<!-- That's it. Widget loads async, < 50KB. -->
```

While you wait, the portal shows the **Provider Notified - Waiting for Approval** screen. You'll get an email and an in-portal notification the moment the widget goes live.

Savvy Dealer
Multi-Site Admin

SETUP
● Getting Started

OVERVIEW
● Dashboard

PLATFORM MANAGEMENT
● Websites

MANAGEMENT
● Users

MY DEALERSHIP
● Conversations
● Leads
● **Widget Config**
● Email Notifications

SECURITY
● Audit Logs

ACCOUNT
● Settings

Provider Notification

Nick Chivinski
Multi-Site Admin

User Created Dealership setup Widget Config Setup **Provider Notified** Chat Live

Waiting for Provider Approval
We emailed install instructions to your website provider.
You'll get a notification the moment they install the snippet.

Provider: **DealerInspire** Email sent - awaiting install

Step 5 - Chat goes live

Your widget is live. From the **Conversations** view, your team picks up chats, replies in real time, and pushes qualified leads to your CRM with one click. Shoppers who'd rather text drop their name and phone number through the same widget; those leads route into your CRM so your BDC starts the text thread from inside the system they already use.

The screenshot displays the Savvy Dealer interface. On the left is a dark sidebar with a menu including: SETUP (Getting Started), OVERVIEW (Dashboard), PLATFORM MANAGEMENT (Websites), MANAGEMENT (Users), MY DEALERSHIP (Conversations, Leads, Widget Config, Email Notifications), SECURITY (Audit Logs), and ACCOUNT (Settings). The main content area is titled 'Inbox' and features a green notification banner: 'Your chat widget is LIVE on abcmotors.com' with the subtext 'Every chat & text-lead now flows to your CRM.' Below this is a list of messages in the inbox, including one from Maria S. (2m) asking 'Is the 2023 Civic still avail...'. The right-hand pane shows a detailed view of a message from Maria S. with the text 'Is the 2023 Honda Civic still available?' and a blue reply bubble that says 'Yes! Let me grab the keys - what time works for you?'. A 'Push to CRM' button is visible in the top right of the message view, and a 'Send' button is at the bottom right of the reply input area.

NOTE

DealerSocket, VinSolutions, Elead — and every major automotive CRM — are supported. Conversation transcripts and contact details push automatically.

Daily-use tips

- Pick up fast.** Visitors who get a reply within 30 seconds are far more likely to book a test drive. Keep the Conversations tab pinned.
- Treat texts like leads.** Text-capture leads land in your CRM the moment the visitor drops their number. Work them from inside the CRM, not from the portal.
- Use 2FA.** Settings → toggle Two-Factor Authentication. Adds seconds at login and protects customer conversations.
- Adjust Working Hours.** Set Saturday/Sunday hours correctly. When you're "Closed," the widget switches to text-capture mode automatically.

Need help?

Drop a note from the portal's notification bell, or contact your Savvy Dealer rep directly. We respond fast.