

# Chatbot 2.1

## Setup

The chatbot is configured through a JSON file which specifies the behavior of the overall experience. Follow these steps to start configuring your chatbot:

1. Create a new JSON file with the configuration found on this page. You can set whatever name you want to the file, but it must have the `*.json` extension.
2. Send this JSON file to your dedicated Customer Success Manager so they can set it up.
3. If your company manages their own script, your Customer Success Manager will send you an URL. Copy and paste it to the `configUrl` property in the API configuration.

## Root properties

List of properties defined in the root of the configuration file. These properties specifies general specs or behaviors of the chatbot.

| Name                                  | Description                                                                                                                                                                                                                                                                                                                   | Required  |
|---------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|
| <b>version</b><br>string              | States the version of the file. The increment of the first value implies file changes that don't have backward compatibility, while the increment of the second value indicates file changes while maintaining backwards compatibility.<br><br><b>Value:</b> an existent version name, i.e. "1.0"<br><br><i>added in V1.0</i> | Mandatory |
| <b>client</b><br>string               | Identify the Customer who owns this chatbot.<br><br><b>Value:</b> an existent customer UUID.<br><br><i>added in V1.0</i>                                                                                                                                                                                                      | Mandatory |
| <b>chatbotId</b><br>string            | Identify the chatbot with a name.<br><br><b>Value:</b> an existent chatbotId to update the chatbot configuration, or a new name to create a new chatbot.<br><br><i>added in V1.0</i>                                                                                                                                          | Mandatory |
| <b>launchNode</b><br>string           | Specify the first node to be launched when the chatbot starts.<br><br><b>Value:</b> an existent node identifier.<br><br><i>added in V1.0</i>                                                                                                                                                                                  | Mandatory |
| <b>seeds</b><br><a href="#">seeds</a> | Set all the available Seeds for the chatbot. Use them to redirect the user to one team or another.<br><br><i>added in V1.0</i>                                                                                                                                                                                                | Optional  |
| <b>nodes</b><br><a href="#">node</a>  | Object containing all the nodes.<br><br><i>Added in V1.0</i>                                                                                                                                                                                                                                                                  | Mandatory |

## Seeds

By default, the session will start with the seed that you have configured as `primarySeed`, or as `secondarySeed` if you start a One-to-One from a One-to-Many. If you want to redirect the customer to a different seed depending on their answers, you can configure different Seeds, with different teams on each one. Give a unique string key to each `configSeed` object to later link a node to it.

| Name | Description | Required |
|------|-------------|----------|
|------|-------------|----------|

|             |                         |           |
|-------------|-------------------------|-----------|
| <b>seed</b> | Id of an existent seed. | Mandatory |
| string      | <i>Added in V1.0</i>    |           |

## Example

```

"seeds": {
  "mobileTeam": {
    "seed": "58107f8c-c930-453b-a253-d63b165c3a62"
  },
  "internetTeam": {
    "seed": "d4ff7a14-fdf2-45c2-9e87-074c7d841c77"
  },
  "televisionTeam": {
    "seed": "45c2a987-2588-482b-a437-bf04f25b4a1f"
  }
}

```

## Nodes

A node represents a single interaction between the chatbot and the customer. It may be a question with options, an input asking for some data, a simple text...

The nodes live within the `nodes` property. They are defined as a string key (which has to be unique) along with a JSON object with the node internal properties.

The `type` property indicates the behavior and look of the node.

## List of types

- `message_button`: A text message followed by one or more buttons.
- `message_session_data`: Group of data asked to the customer in order to configure the session that will be launched or scheduled.
- `message_simple`: A simple text message.
- `message_link`: A message with text and a set of clickable links.

## Types

### message\_button

A text message followed by one or more buttons. We recommend to use this type of node to ask the customer to select an option from the ones displayed.

| Name        | Description                  | Required  |
|-------------|------------------------------|-----------|
| <b>type</b> | <b>Value:</b> message_button | Mandatory |
| string      | <i>added in V1.0</i>         |           |

|                              |                                                                                                                                                          |           |
|------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|
| <b>text</b><br>string        | Text of the message. Use this property to ask the question that the customer must answer.<br><i>added in V1.0</i>                                        | Mandatory |
| <b>options</b><br>option [ ] | Possible options displayed to the customer, which will be presented as buttons. We recommend not to display more than 6 options.<br><i>added in V1.0</i> | Mandatory |

### message\_button - option

| Name                           | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | Required  |
|--------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|
| <b>buttonText</b><br>string    | Text of the button. We recommend not to exceed 35 characters.<br><i>added in V1.0</i>                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | Mandatory |
| <b>seed</b><br>string          | Id of a configured <a href="#">seed</a> . When the customer clicks on this button, the session will be configured with the provided seed.<br><i>added in V1.0</i>                                                                                                                                                                                                                                                                                                                                                                                               | Optional  |
| <b>action</b><br>string        | One of either: <ul style="list-style-type: none"> <li>• Id of a configured <a href="#">node</a> to make a new chatbot interaction appear.</li> <li>• <b>start</b> to initiate a session. This session can be a chat session or a chat plus voice session, depending on if the customer has already filled the <code>input_phone</code> or not.</li> <li>• <b>schedule</b> to schedule a session (in this case, it is mandatory to have previously declared an <code>input_phone</code> and <code>input_datetime</code> fields).</li> </ul> <i>added in V1.0</i> | Mandatory |
| <b>displayLegal</b><br>boolean | Determines whether or not legal agreements should be displayed before the configured action.<br><i>added in V2.1</i>                                                                                                                                                                                                                                                                                                                                                                                                                                            | Optional  |

### message\_session\_data

Group of data that will be asked to the customer in order to configure the session that will be launched or scheduled.

| Name                         | Description                                                             | Required  |
|------------------------------|-------------------------------------------------------------------------|-----------|
| <b>type</b><br>string        | <b>Value:</b> <code>message_session_data</code><br><i>added in V1.0</i> | Mandatory |
| <b>fields</b><br>field [ ]   | Set all the fields for this form.<br><i>added in V1.0</i>               | Mandatory |
| <b>options</b><br>option [ ] | Set all the options for this form.<br><i>added in V2.0</i>              | Mandatory |

### message\_session\_data - fields:

#### message\_session\_data - field - input\_name

Use this input to ask for the customer's name.

| Name | Description | Required |
|------|-------------|----------|
|------|-------------|----------|

|                             |                                                                                  |                           |
|-----------------------------|----------------------------------------------------------------------------------|---------------------------|
| <b>type</b><br>string       | <b>Value:</b> input_name<br><br><i>added in V1.2</i>                             | Mandatory                 |
| <b>mandatory</b><br>boolean | It determines if the field is mandatory or optional.<br><br><i>added in V1.2</i> | Optional<br>default: true |

#### message\_session\_data - field - input\_phone

Use this input to ask for the customer's phone.

| Name                        | Description                                                                      | Required                  |
|-----------------------------|----------------------------------------------------------------------------------|---------------------------|
| <b>type</b><br>string       | <b>Value:</b> input_phone<br><br><i>added in V1.0</i>                            | Mandatory                 |
| <b>mandatory</b><br>boolean | It determines if the field is mandatory or optional.<br><br><i>added in V1.2</i> | Optional<br>default: true |

#### message\_session\_data - field - checkbox\_privacy\_policy

Use this input to ask the customer to check the privacy policy.

| Name                  | Description                                                       | Required  |
|-----------------------|-------------------------------------------------------------------|-----------|
| <b>type</b><br>string | <b>Value:</b> checkbox_privacy_policy<br><br><i>added in V1.0</i> | Mandatory |

#### message\_session\_data - field - input\_datetime

Use this input to ask the customer for a date and a time in order to schedule a session.

| Name                  | Description                                              | Required  |
|-----------------------|----------------------------------------------------------|-----------|
| <b>type</b><br>string | <b>Value:</b> input_datetime<br><br><i>added in V2.0</i> | Mandatory |

#### message\_session\_data - option

##### message\_session\_data - option - submit

| Name                        | Description                                                                                                                                                                                                                                               | Required  |
|-----------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|
| <b>type</b><br>string       | <b>Value:</b> button_submit<br><br>Validate the fields and store its values. All <a href="#">message_session_data</a> nodes may contain one or more options of this type. It is mandatory to have at least one submit option.<br><br><i>added in V2.0</i> | Mandatory |
| <b>buttonText</b><br>string | Text of the button. We recommend not to exceed 35 characters.<br><br><i>added in V2.0</i>                                                                                                                                                                 | Mandatory |

|                                |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |           |
|--------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|
| <b>action</b><br>string        | <p>One of either:</p> <ul style="list-style-type: none"> <li>• Id of a configured <a href="#">node</a> to make a new chatbot interaction appear.</li> <li>• <b>start</b> to initiate a session. This session can be a chat session or a chat plus voice session, depending on if the customer has already filled the <code>input_phone</code> or not.</li> <li>• <b>schedule</b> to schedule a session (in this case, it is mandatory to have previously declared an <code>input_phone</code> and <code>input_datetime</code> fields).</li> </ul> <p style="text-align: right;"><i>added in V2.0</i></p> | Mandatory |
| <b>displayLegal</b><br>boolean | <p>Determines whether or not legal agreements should be displayed before the configured action.</p> <p style="text-align: right;"><i>added in V2.1</i></p>                                                                                                                                                                                                                                                                                                                                                                                                                                               | Optional  |

#### message\_session\_data - option - standard

| Name                           | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | Required  |
|--------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|
| <b>type</b><br>string          | <p><b>Value:</b> <code>button_standard</code></p> <p>Don't validate fields nor store its values, just perform the action value.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | Mandatory |
| <b>buttonText</b><br>string    | <p>Text of the button. We recommend not to exceed 35 characters.</p> <p style="text-align: right;"><i>added in V2.0</i></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | Mandatory |
| <b>action</b><br>string        | <p>One of either:</p> <ul style="list-style-type: none"> <li>• Id of a configured <a href="#">node</a> to make a new chatbot interaction appear.</li> <li>• <b>start</b> to initiate a session. This session can be a chat session or a chat plus voice session, depending on if the customer has already filled the <code>input_phone</code> or not.</li> <li>• <b>schedule</b> to schedule a session (in this case, it is mandatory to have previously declared an <code>input_phone</code> and <code>input_datetime</code> fields).</li> </ul> <p style="text-align: right;"><i>added in V2.0</i></p> | Mandatory |
| <b>displayLegal</b><br>boolean | <p>Determines whether or not legal agreements should be displayed before the configured action.</p> <p style="text-align: right;"><i>added in V2.1</i></p>                                                                                                                                                                                                                                                                                                                                                                                                                                               | Optional  |

#### message\_simple

A simple text message shown to the customer.

| Name                  | Description                                                                                             | Required  |
|-----------------------|---------------------------------------------------------------------------------------------------------|-----------|
| <b>type</b><br>string | <p><b>Value:</b> <code>message_simple</code></p> <p style="text-align: right;"><i>added in V1.0</i></p> | Mandatory |
| <b>text</b><br>string | <p>Text of the message.</p> <p style="text-align: right;"><i>added in V1.0</i></p>                      | Mandatory |

|                             |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |          |
|-----------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|
| <b>action</b><br><br>string | <p>One of either:</p> <ul style="list-style-type: none"> <li>• Id of a configured <a href="#">node</a> to make a new chatbot interaction appear.</li> <li>• <b>start</b> to initiate a session. This session can be a chat session or a chat plus voice session, depending on if the customer has already filled the <code>input_phone</code> or not.</li> <li>• <b>schedule</b> to schedule a session (in this case, it is mandatory to have previously declared an <code>input_phone</code> and <code>input_datetime</code> fields).</li> </ul> <p>In this type of node the action starts automatically after a few seconds.</p> <p style="text-align: right;"><i>added in V1.0</i></p> | Optional |
|-----------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|

## message\_link

A message with text and a set of clickable links.

| Name                     | Description                                                                                                                                                                                    | Required  |
|--------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|
| <b>type</b><br>string    | <b>Value:</b> message_link<br><br><i>added in V1.1</i>                                                                                                                                         | Mandatory |
| <b>text</b><br>string    | Text of the message. Use this property to provide a description about the subsequent links.<br><br><i>added in V1.1</i>                                                                        | Mandatory |
| <b>action</b><br>string  | Id of a configured <a href="#">node</a> to make a new chatbot interaction appear.<br><br>In this type of node the action starts automatically after a few seconds.<br><br><i>added in V1.1</i> | Optional  |
| <b>links</b><br>link [ ] | List of links to show.<br><br><i>added in V1.1</i>                                                                                                                                             | Mandatory |

## message\_link - link

| Name                      | Description                                           | Required  |
|---------------------------|-------------------------------------------------------|-----------|
| <b>linkText</b><br>string | Visible text of the link.<br><br><i>added in V1.1</i> | Mandatory |
| <b>linkUrl</b><br>string  | Target URL of the link.<br><br><i>added in V1.1</i>   | Mandatory |

## File example

This example shows how to set a chatbot meant for sales, that begins with a filter to distinguish between clients and everyone else.

The customers that are clients will be suggested to contact to the customer care service (with a link to the contact details) or enter to their private area (with a link to the private area login).

The customers that are not clients will be asked how they prefer to talk, via phone or chat. If they want to talk via phone, they will have to provide their phone number and accept the privacy policy before starting the session with an agent. If they can't talk at that moment, they will be able to choose the date and time when they want to be called.

All the sessions will be redirected to the default seed, as no other seed has been set during the chatbot conversation.

After requesting the customer their personal data (name, phone, email, etc) the legal agreements screen will be displayed.

## chatbot.json

```
{
  "version": "2.1",
  "client": "6b4ae9d1-3f71-43de-9981-683aaa128748",
  "chatbotId": "salesService",
  "launchNode": "welcomeMessage",
  "nodes": {
    "welcomeMessage": {
      "type": "message_simple",
      "text": "A few more details will help get you to the right
person",
      "action": "clientFilter"
    },
    "clientFilter": {
      "type": "message_button",
      "text": "Are you already a client?",
      "options": [
        {
          "buttonText": "Yes, I'm a client",
          "action": "customerCare"
        },
        {
          "buttonText": "No, I'm not a client yet",
          "action": "setSessionType"
        }
      ]
    },
    "customerCare": {
      "type": "message_link",
      "text": "Please, get in touch with our Customer Care service, or
enter on your private area to report your issue.",
      "links": [
        {
          "linkText": "Customer Care contact",
          "linkUrl": "https://www.website.com/customer-care/"
        },
        {
          "linkText": "Private Area",
          "linkUrl": "https://www.website.com/private-area/"
        }
      ]
    },
    "setSessionType": {
      "type": "message_button",
      "text": "How do you want to talk?",
      "options": [
        {
          "buttonText": "Chat",
          "action": "chatConfirmation"
        }
      ]
    }
  }
}
```

```
    },
    {
      "buttonText": "Phone",
      "action": "phoneMessage"
    },
    {
      "buttonText": "I can't talk right now",
      "action": "agendaMessage"
    }
  ]
},
"chatConfirmation": {
  "type": "message_simple",
  "text": "Great! You will be attended in a moment",
  "action": "start"
},
"phoneMessage": {
  "type": "message_simple",
  "text": "Provide your phone number so that one of our experts can
call you",
  "action": "telcoForm"
},
"telcoForm": {
  "type": "message_session_data",
  "fields": [
    {
      "type": "input_phone"
    },
    {
      "type": "checkbox_privacy_policy"
    }
  ],
  "options": [
    {
      "type": "button_submit",
      "buttonText": "Connect now",
      "displayLegal": true,
      "action": "start"
    }
  ]
},
"agendaMessage": {
  "type": "message_simple",
  "text": "Don't worry! You can set an appointment and an expert
will call you whenever you want",
  "action": "agendaForm"
},
"agendaForm": {
  "type": "message_session_data",
  "fields": [
```

```
{
  "type": "input_phone"
},
{
  "type": "input_datetime"
},
{
  "type": "checkbox_privacy_policy"
}
],
"options": [
  {
    "type": "button_submit",
    "buttonText": "Book an appointment",
    "action": "schedule"
  }
]
```

```
}
}
}
```

This example shows how to set a chatbot that redirects the customer to one seed or another depending on their responses, to find the expert that better match their needs. Then the customer will be attended by an agent on a One-to-One session with a phone call.

First the Seeds are configured and identified.

Then the chatbot asks the customer a question, and each response sets a different configured seed.

Then the chatbot asks the customer to provide their name and phone number and accept the privacy policy. Once the customer clicks on "Connect now", the customer will receive a phone call and the session starts. If they want, they can also choose the date and time when they want to be called.

After requesting the customer their personal data (name, phone, email, etc) the legal agreements screen will be displayed.

### chatbot.json

```
{
  "version": "2.1",
  "client": "6b4ae9d1-3f71-43de-9981-683aaa128748",
  "chatbotId": "telcoShop",
  "seeds": {
    "mobileTeam": {
      "seed": "58107f8c-c930-453b-a253-d63b165c3a62"
    },
    "internetTeam": {
      "seed": "d4ff7a14-fdf2-45c2-9e87-074c7d841c77"
    },
    "televisionTeam": {
      "seed": "45c2a987-2588-482b-a437-bf04f25b4a1f"
    }
  },
  "launchNode": "qualifierQuestion",
  "nodes": {
    "qualifierQuestion": {
      "type": "message_button",
      "text": "What do you want to talk about?",
      "options": [
        {
          "buttonText": "Mobile plans",
          "seed": "mobileTeam",
          "action": "phoneMessage"
        },
        {
          "buttonText": "Internet plans",
          "seed": "internetTeam",
          "action": "phoneMessage"
        },
        {
          "buttonText": "Television",
```

```
        "seed": "televisionTeam",
        "displayLegal": true,
        "action": "phoneMessage"
    }
]
},
"phoneMessage": {
    "type": "message_simple",
    "text": "Provide your phone number so that one of our experts can
call you",
    "action": "form"
},
"form": {
    "type": "message_session_data",
    "fields": [
        {
            "type": "input_name",
            "mandatory": false
        },
        {
            "type": "input_phone",
            "mandatory": true
        },
        {
            "type": "checkbox_privacy_policy"
        }
    ],
    "options": [
        {
            "type": "button_submit",
            "buttonText": "Connect now",
            "displayLegal": true,
            "action": "start"
        },
        {
            "type": "button_submit",
            "buttonText": "Connect later",
            "action": "agendaMessage"
        }
    ]
},
"agendaMessage": {
    "type": "message_simple",
    "text": "When do you want to be called?",
    "action": "telcoForm"
},
"agendaForm": {
    "type": "message_session_data",
    "fields": [
        {
```

```
        "type": "input_datetime"
    }
],
"options": [
    {
        "type": "button_submit",
        "buttonText": "Book an appointment",
        "action": "schedule"
    }
]
}
```

}  
}