

# Chatbot 3.0

## 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> 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.  <b>Value:</b> an existent version name, i.e. "1.0"  <i>added in V1.0</i>	Mandatory
<b>client</b> string	Identify the Customer who owns this chatbot.  <b>Value:</b> an existent customer UUID.  <i>added in V1.0</i>	Mandatory
<b>chatbotId</b> string	Identify the chatbot with a name.  <b>Value:</b> an existent chatbotId to update the chatbot configuration, or a new name to create a new chatbot.  <i>added in V1.0</i>	Mandatory
<b>launchNode</b> string	Specify the first node to be launched when the chatbot starts.  <b>Value:</b> an existent node identifier.  <i>added in V1.0</i>	Mandatory
<b>seeds</b> <a href="#">seeds</a>	Set all the available Seeds for the chatbot. Use them to redirect the user to one team or another.  <i>added in V1.0</i>	Optional
<b>nodes</b> <a href="#">node</a>	Object containing all the nodes.  <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> string	Text of the message. Use this property to ask the question that the customer must answer. <i>added in V1.0</i>	Mandatory
<b>options</b> option [ ]	Possible options displayed to the customer, which will be presented as buttons. We recommend not to display more than 6 options. <i>added in V1.0</i>	Mandatory

### message\_button - option

Name	Description	Required
<b>buttonText</b> string	Text of the button. We recommend not to exceed 35 characters. <i>added in V1.0</i>	Mandatory
<b>seed</b> 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. <i>added in V1.0</i>	Optional
<b>action</b> 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> boolean	Determines whether or not legal agreements should be displayed before the configured action. <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> string	<b>Value:</b> message_session_data <i>added in V1.0</i>	Mandatory
<b>fields</b> field [ ]	Set all the fields for this form. <i>added in V1.0</i>	Mandatory
<b>submit</b> submit {}	Set the main submit button for this form. <i>added in V3.0</i>	Mandatory
<b>alternateOptions</b> alternateOptions [ ]	Set all the alternate options for this form. <i>renamed in V3.0</i>	Optional

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

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

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

Name	Description	Required
<b>type</b> string	<b>Value:</b> input_phone <i>added in V1.0</i>	Mandatory
<b>mandatory</b> boolean	It determines if the field is mandatory or optional. <i>added in V1.2</i>	Optional 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> string	<b>Value:</b> checkbox_privacy_policy <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> string	<b>Value:</b> input_datetime <i>added in V2.0</i>	Mandatory

#### message\_session\_data - Submit

Name	Description	Required
<b>buttonText</b> string	Text of the button. We recommend not to exceed 35 characters. <i>added in V2.0</i>	Mandatory

<b>action</b> 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> 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 - Alternate options

Name	Description	Required
<b>buttonText</b> 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> string	<p>Id of a configured <a href="#">node</a> to replace current message session data with configured action.</p> <p style="text-align: right;"><i>modified in V3.0</i></p>	Mandatory

### message\_simple

A simple text message shown to the customer.

Name	Description	Required
<b>type</b> string	<p><b>Value:</b> message_simple</p> <p style="text-align: right;"><i>added in V1.0</i></p>	Mandatory
<b>text</b> string	<p>Text of the message.</p> <p style="text-align: right;"><i>added in V1.0</i></p>	Mandatory
<b>action</b> 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> string	<p><b>Value:</b> message_link</p> <p style="text-align: right;"><i>added in V1.1</i></p>	Mandatory

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

## message\_link - link

Name	Description	Required
<b>linkText</b> string	Visible text of the link. <i>added in V1.1</i>	Mandatory
<b>linkUrl</b> string	Target URL of the link. <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's name we present a **message\_simple\_data** node requesting the phone and displaying alternate options (*I'll call myself and Call me now*). Both alternate options will replace the current node content. For the "Call me later" we will provide necessary inputs to schedule a date.

### chatbot.json

```
{
  "version": "3.0",
  "client": "aec0c8bc-cd3b-4e75-875c-a2659794ffb9",
  "chatbotId": "chatbot-alternate",
  "launchNode": "welcomeQuestion",
  "nodes": {
    "welcomeQuestion": {
      "type": "message_button",
      "text": "How can I help you?",
      "options": [{
        "buttonText": "Tv's",
        "action": "chatName"
      }],
    },
  }
}
```

```
        "buttonText": "Washing Machines",
        "action": "chatName"
    }
]
},
"chatName": {
    "type": "message_simple",
    "text": "What's your name?",
    "action": "chatNameForm"
},
"chatNameForm": {
    "type": "message_session_data",
    "fields": [{
        "type": "input_name",
        "mandatory": true
    }],
    "submit": {
        "buttonText": "Send",
        "action": "provideDetails"
    }
},
"provideDetails": {
    "type": "message_simple",
    "text": "Please provide your details to connect with an agent",
    "action": "connectNow"
},
"connectNow": {
    "type": "message_session_data",
    "fields": [{
        "type": "input_phone",
        "mandatory": true
    }],
    "submit": {
        "buttonText": "Connect now",
        "action": "start",
        "displayLegal": true
    },
    "alternateOptions": [{
        "buttonText": "I'll call myself",
        "action": "inboundNode"
    },
    {
        "buttonText": "Call me later",
        "action": "agendaNode"
    }
]
},
"agendaNode": {
    "type": "message_session_data",
    "fields": [{
```

```
        "type": "input_phone",
        "mandatory": true
    },
    {
        "type": "input_datetime"
    }
],
"submit": {
    "buttonText": "Book an appointment",
    "action": "schedule",
    "displayLegal": true
},
"alternateOptions": [{
    "buttonText": "Call me now",
    "action": "connectNow"
}]
},
"inboundNode": {
    "type": "message_session_data",
    "fields": [{
        "type": "input_phone",
        "mandatory": true
    },
    {
        "type": "input_datetime"
    }
],
"submit": {
    "buttonText": "Book an appoinment",
    "action": "schedule",
    "displayLegal": true
},
"alternateOptions": [{
    "buttonText": "Call me now",
    "action": "connectNow"
}]
}
```



```
}  
  }  
}
```