

Chatbot 3.4

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 |
|---------------------------------------|---|-----------|
| version 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. Value: an existent version name, i.e. "1.0" <i>added in V1.0</i> | Mandatory |
| client string | Identify the Customer who owns this chatbot. Value: an existent customer UUID. <i>added in V1.0</i> | Mandatory |
| chatbotId string | Identify the chatbot with a name. Value: an existent chatbotId to update the chatbot configuration, or a new name to create a new chatbot. <i>added in V1.0</i> | Mandatory |
| launchNode string | Specify the first node to be launched when the chatbot starts. Value: an existent node identifier. <i>added in V1.0</i> | Mandatory |
| seeds seeds | 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 |
| nodes nodes | 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 object 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 |
|------|-------------|----------|
|------|-------------|----------|

| | | |
|-------------|-------------------------|-----------|
| seed | 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.
- `message_inbound`: A message to show the inbound information and a set of alternate options.

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

| | | |
|-------------------------------|--|-----------|
| text string | Text of the message. Use this property to ask the question that the customer must answer. <i>added in V1.0</i> | Mandatory |
| options options [] | 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 |
|--------------------------------|---|-----------|
| buttonText string | Text of the button. We recommend not to exceed 35 characters. <i>added in V1.0</i> | Mandatory |
| seed string | Id of a configured seed . When the customer clicks on this button, the session will be configured with the provided seed. <i>added in V1.0</i> | Optional |
| action string | One of either: <ul style="list-style-type: none"> • Id of a configured node to make a new chatbot interaction appear. • start 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. • schedule 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). <i>added in V1.0</i> | Mandatory |
| displayLegal 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 |
|---|---|--|
| type string | Value: message_session_data <i>added in V1.0</i> | Mandatory |
| fields fields [] | Set all the fields for this form. We recommend not to use more than four fields on the same form. <i>added in V1.0</i> | Mandatory |
| submit submit {} | Set the main submit button for this form. <i>added in V3.0</i> | Mandatory |
| alternateOptions alternateOptions [] | Set of all the alternate options for this message <i>renamed in V3.0</i> | Optional |
| backup backup {} | Set the node to show if an error occurs during the request of the external select option. <i>added in V3.4</i> | Mandatory only if type:'select' and options:'external' |

message_session_data - fields:

message_session_data - field - input_name

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

| Name | Description | Required |
|-----------------------------|---|---------------------------|
| type string | Value: input_name <i>added in V1.2</i> | Mandatory |
| mandatory boolean | True to make the field mandatory, false to make it 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 |
|-----------------------------|---|---------------------------|
| type string | Value: input_phone <i>added in V1.0</i> | Mandatory |
| mandatory boolean | True to make the field mandatory, false to make it 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 |
|-----------------------|---|-----------|
| type string | Value: 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 |
|-----------------------|--|-----------|
| type string | Value: input_datetime <i>added in V2.0</i> | Mandatory |

message_session_data - field - input_text

Use this input field to ask the customer for any additional data in text format.

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

| | | |
|------------------------------|---|---------------------------|
| id string | A unique identifier for the custom field. <i>added in V3.2</i> | Mandatory |
| type string | Value: input_text <i>added in V3.2</i> | Mandatory |
| placeholder string | The text to be displayed in the custom field when it's empty. Use it to describe the expected value of the input field. <i>added in V3.2</i> | Mandatory |
| mandatory boolean | True to make the field mandatory, false to make it optional <i>added in V3.2</i> | Optional default: true |

message_session_data - field - select

Use this input field to ask the customer for any additional data within a set of predefined options.

| Name | Description | Required |
|--|--|---------------------------|
| id string | A unique identifier for the custom field. <i>added in V3.2</i> | Mandatory |
| type string | Value: select <i>added in V3.2</i> | Mandatory |
| placeholder string | The text to be displayed in the custom field when it's empty. Use it to describe the expected value of the input field. <i>added in V3.2</i> | Mandatory |
| mandatory boolean | True to make the field mandatory, false to make it optional <i>added in V3.2</i> | Optional default: true |
| options options [] / string | Predefined options to be selected in the custom field. One of the following: <ul style="list-style-type: none"> • Array with a minimum of 2 options • external to request the options from an external source <i>modified in V3.4</i> | Mandatory |

message_button - field - options

| Name | Description | Required |
|------------------------|---|-----------|
| label string | Options that will appear in the selector's dropdown list. <i>added in V3.2</i> | Mandatory |
| value string | Value that will be sent to the server if that option is selected. <i>added in V3.2</i> | Mandatory |

message_session_data - Submit

| Name | Description | Required |
|--------------------------------|---|-----------|
| buttonText string | Text of the button. We recommend not to exceed 35 characters. <i>added in V2.0</i> | Mandatory |
| action string | One of either: <ul style="list-style-type: none">• Id of a configured node to make a new chatbot interaction appear.• start 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.• schedule 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). <i>added in V2.0</i> | Mandatory |
| displayLegal boolean | Determines whether or not legal agreements should be displayed before the configured action. <i>added in V2.1</i> | Optional |

message_session_data - Alternate options

| Name | Description | Required |
|-----------------------------|---|-----------|
| buttonText string | Text of the button. We recommend not to exceed 35 characters. <i>added in V2.0</i> | Mandatory |
| action string | Id of a configured node that will replace the current one. <i>modified in V3.0</i> | Mandatory |

message_session_data - Backup

| Name | Description | Required |
|-------------------------|---|-----------|
| action string | One of either: <ul style="list-style-type: none">• Id of a configured node to make a new chatbot interaction appear. <i>added in V3.4</i> | Mandatory |

message_simple

A simple text message shown to the customer.

| Name | Description | Required |
|-----------------------|--|-----------|
| type string | Value: message_simple <i>added in V1.0</i> | Mandatory |
| text string | Text of the message. <i>added in V1.0</i> | Mandatory |

| | | |
|---------------------------------|---|----------|
| action string | <p>One of the following:</p> <ul style="list-style-type: none"> • Id of a configured nodes to make a new chatbot interaction appear. • start 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. • schedule 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). • end to end the chatbot conversation and create a lead with the data collected through the chatbot conversation. It's mandatory to define a resultCode in the same node. <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. updated in v3.3</i></p> | Optional |
| resultCode number | <p>Code of the segment that will be stored as a result of the lead, in case the end action has been set in this node.</p> <p>One of the following:</p> <ul style="list-style-type: none"> • 5 for Sale • 4 for Valid • 3 for Invalid <p style="text-align: right;"><i>added in V3.3</i></p> | Optional |

message_link

A message with text and a set of clickable links.

| Name | Description | Required |
|---------------------------------|---|-----------|
| type string | <p>Value: message_link</p> <p style="text-align: right;"><i>added in V1.1</i></p> | Mandatory |
| text string | <p>Text of the message. Use this property to provide a description about the subsequent links.</p> <p style="text-align: right;"><i>added in V1.1</i></p> | Mandatory |
| action string | <p>One of the following:</p> <ul style="list-style-type: none"> • Id of a configured nodes to make a new chatbot interaction appear. • end to end the chatbot conversation and create a lead with the data collected through the chatbot conversation. It's mandatory to define a resultCode in the same node. <p>In this type of node the action starts automatically after a few seconds.</p> <p style="text-align: right;"><i>added in V1.1. updated in v3.3</i></p> | Optional |
| resultCode number | <p>Code of the segment that will be stored as a result of the lead, in case the end action has been set in this node.</p> <p>One of the following:</p> <ul style="list-style-type: none"> • 5 for Sale • 4 for Valid • 3 for Invalid <p style="text-align: right;"><i>added in V3.3</i></p> | Optional |
| links link [] | <p>List of links to show.</p> <p style="text-align: right;"><i>added in V1.1</i></p> | Mandatory |

message_link - link

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

message_inbound

A message to show the inbound information and a set of alternate options.

| Name | Description | Required |
|--|---|-----------|
| type string | Value: message_inbound <i>added in V3.1</i> | Mandatory |
| alternateOptions alternateOptions [] | Set of all the alternate options for this message <i>added in V3.1</i> | Mandatory |

message_session_data - Alternate options

| Name | Description | Required |
|-----------------------------|---|-----------|
| buttonText string | Text of the button. We recommend not to exceed 35 characters. <i>added in V3.1</i> | Mandatory |
| action string | Id of a configured node that will replace the current one. <i>modified in V3.1</i> | Mandatory |

File examples

The next 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 their current provider, and plan, for analytical purposes. Then, they 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.

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

chatbot.json

```
{
  "version": "3.3",
  "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": "currentProviderMessage"
    }
  ]
},
"customerCare": {
  "type": "message_link",
  "text": "Please, get in touch with our Customer Care service, or
enter on your private area to report your issue.",
  "action": "end",
  "resultCode": 3,
  "links": [
    {
      "linkText": "Customer Care contact",
      "linkUrl": "https://www.website.com/customer-care/"
    },
    {
      "linkText": "Private Area",
      "linkUrl": "https://www.website.com/private-area/"
    }
  ]
},
"currentProviderMessage": {
  "type": "message_simple",
  "text": "Which is your current provider and plan?",
  "action": "currentProviderForm"
},
"currentProviderForm": {
  "type": "message_session_data",
  "fields": [
    {
      "type": "select",
      "id": "currentProvider",
      "mandatory": true,
      "placeholder": "Your current provider",
      "options": [
        {
          "label": "Starphone",
```

```

        "value": "starphone"
    },
    {
        "label": "Silverphone",
        "value": "silverphone"
    },
    {
        "label": "Goldnet",
        "value": "goldnet"
    },
    {
        "label": "I don't have any provider",
        "value": "none"
    }
]
},
{
    "type": "input_text",
    "id": "currentPlan",
    "mandatory": false,
    "placeholder": "Your current plan"
}
],
"submit": {
    "buttonText": "Next",
    "action": "setSessionType"
}
},
"setSessionType": {
    "type": "message_button",
    "text": "How do you want to talk?",
    "options": [
        {
            "buttonText": "Chat",
            "action": "chatConfirmation"
        },
        {
            "buttonText": "Phone",
            "action": "phoneMessage"
        }
    ]
}
],
},
"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": "callMeNowForm"
},
"callMeNowForm": {
  "type": "message_session_data",
  "fields": [
    {
      "type": "input_phone",
      "mandatory": true
    },
    {
      "type": "checkbox_privacy_policy"
    }
  ],
  "submit": {
    "buttonText": "Connect now",
    "displayLegal": true,
    "action": "start"
  }
}
```

```
}  
}  
}
```

The next 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 fits their needs. To do so, the different Seeds must be previously configured and identified in the json file.

chatbot.json

```
{  
  "version": "3.3",  
  "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",  
          "action": "phoneMessage"  
        }  
      ]  
    },  
  },  
}
```

```
"phoneMessage": {
  "type": "message_simple",
  "text": "Provide your phone number so that one of our experts can
call you",
  "action": "callMeNowForm"
},
"callMeNowForm": {
  "type": "message_session_data",
  "fields": [
    {
      "type": "input_phone",
      "mandatory": true
    }
  ],
  "submit": {
    "buttonText": "Connect now",
    "displayLegal": true,
    "action": "start"
  }
}
```

```
}  
}  
}
```

The next example shows how to set a chatbot that pushes the customer to provide their phone number to be called, but as alternate options they can also choose the inbound (which will show a phone number for the customer to call) or the agenda (which will let them choose the date and time when they want to be called). If they choose one of these alternative options, the content displayed to the customer will change.

This example also shows how to set the GDPR legal agreements, to be shown before starting or scheduling a session

chatbot.json

```
{  
  "version": "3.3",  
  "client": "6b4ae9d1-3f71-43de-9981-683aaa128748",  
  "chatbotId": "telcoShop",  
  "launchNode": "formMessage",  
  "nodes": {  
    "formMessage": {  
      "type": "message_simple",  
      "text": "Provide your phone number so that one of our experts can  
call you",  
      "action": "callMeNowForm"  
    },  
    "callMeNowForm": {  
      "type": "message_session_data",  
      "fields": [  
        {  
          "type": "input_phone",  
          "mandatory": true  
        }  
      ],  
      "submit": {  
        "buttonText": "Connect now",  
        "displayLegal": true,  
        "action": "start"  
      },  
      "alternateOptions": [  
        {  
          "buttonText": "I'll call myself",  
          "action": "inboundNode",  
          "displayLegal": true  
        },  
        {  
          "buttonText": "Call me later",  
          "action": "agendaForm"  
        }  
      ]  
    }  
  }  
}
```

```
]
},
"agendaForm": {
  "type": "message_session_data",
  "fields": [
    {
      "type": "input_phone",
      "mandatory": true
    },
    {
      "type": "input_datetime"
    }
  ],
  "submit": {
    "buttonText": "Book an appointment",
    "action": "schedule"
  },
  "alternateOptions": [
    {
      "buttonText": "I'll call myself",
      "displayLegal": true,
      "action": "inboundNode"
    },
    {
      "buttonText": "Call me now",
      "action": "callMeNowForm"
    }
  ]
},
"inboundNode": {
  "type": "message_inbound",
  "alternateOptions": [
    {
      "buttonText": "Call me now",
      "action": "callMeNowForm"
    },
    {
      "buttonText": "Call me later",
      "action": "agendaForm"
    }
  ]
}
```

```
}  
  }  
}
```