

Chatbot 3.6

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

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.
- `message_catalog`: A catalog of options to choose from. Each option has an image and a short text.

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 string	Value: message_button <i>added in V1.0</i>	Mandatory
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
validation validation []	Custom validation rules to ensure the field is filled in using the correct format. <i>added in V3.5</i>	Optional

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
validation validation []	Custom validation rules to ensure the field is filled in using the correct format. <i>added in V3.5</i>	Optional

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
validation validation []	Custom validation rules to ensure the field is filled in using the correct format. <i>added in V3.5</i>	Optional

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). <p style="text-align: right;"><i>added in V2.0</i></p>	Mandatory
displayLegal boolean	Determines whether or not legal agreements should be displayed before the configured action. <p style="text-align: right;"><i>added in V2.1</i></p>	Optional

MESSAGE_SESSION_DATA - ALTERNATE OPTIONS

Name	Description	Required
buttonText string	Text of the button. We recommend not to exceed 35 characters. <p style="text-align: right;"><i>added in V2.0</i></p>	Mandatory
action string	Id of a configured node that will replace the current one. <p style="text-align: right;"><i>modified in V3.0</i></p>	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. <p style="text-align: right;"><i>added in V3.4</i></p>	Mandatory

MESSAGE_SESSION_DATA - VALIDATION

Name	Description	Required
Pattern string	A regular expression that specifies the format that the value introduced in the field must meet to be valid. Here you can find very useful examples of regular expressions and also a link to test them. <p style="text-align: right;"><i>added in V3.5</i></p>	Mandatory
Error string	A custom error message to be displayed if the value introduced on the field is not valid. <p style="text-align: right;"><i>added in V3.5</i></p>	Optional

Common regular expressions

This table show an example of common regular expressions and a link to test them, bear in mind not to copy without test it.

Rule	Regular expression	Examp
Maximum length	<code> /^[a-zA-Z0-9]*(0,30)\$/ </code>	Check and tes
Only letters with space with maximum length English characters	<code> ^[a-zA-Z\s]{0,10}\$ </code>	Check and tes

Only letters without space with maximum length English characters	<code>^[a-zA-Z]{0,20}\$</code>	Check and tes
Only letters with spaces and maximum length Spanish characters	<code>^[a-zA-Z\u00C0-\u00FF\s]{0,20}\$</code>	Check and tes
Only numbers with maximum length	<code>^[0-9\s]{0,10}\$</code>	Check and tes
Email format	<code>/^[a-z0-9_\.+]+\@([\da-z\.-]+\.[a-z]{2,6})\$/</code>	Commc email
Date format: dd-mmm-YYYY or dd/mmm/YYYY or dd.mmm.YYYY	<code>/^(?:?:31(V \.)(?:0?[13578][102] (?:Jan Mar May Jul Aug Oct Dec)))1(?:?:29 30)(V \.)(?:0?[1,3-9][10-2] (?:Jan Mar Apr May Jun Jul Aug Sep Oct Nov Dec))2(?:?:1[6-9][2-9]d)?\d{2})\$(?:29(V \.)(?:0?2 (?:Feb)))3(?:?:1[6-9][2-9]d)?(?:0[48][2468][048][13579][26] (?:?:16[2468][048][3579][26]00)))\$^(?:0?[1-9]1\d 2[0-8])(V \.)(?:?:0?1-9 (?:Jan Feb Mar Apr May Jun Jul Aug Sep))1(?:0-2 (?:Oct Nov Dec))4(?:?:1[6-9][2-9]d)?\d{2})\$/</code>	Date exampl

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	One of the following: <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><i>added in V1.0. updated in v3.3</i></p>	Optional
resultCode number	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. One of the following: <ul style="list-style-type: none"> • 5 for Sale • 4 for Valid • 3 for Invalid <p><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	Value: message_link <i>added in V1.1</i>	Mandatory
text string	Text of the message. Use this property to provide a description about the subsequent links. <i>added in V1.1</i>	Mandatory
action string	One of the following: <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. In this type of node the action starts automatically after a few seconds. <i>added in V1.1. updated in v3.3</i>	Optional
resultCode number	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. One of the following: <ul style="list-style-type: none">• 5 for Sale• 4 for Valid• 3 for Invalid <i>added in V3.3</i>	Optional
links link []	List of links to show. <i>added in V1.1</i>	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

message_catalog

A catalog of options to choose from. Each option has an image and a short text.

Name	Description	Required
type string	Value: message_catalog <i>added in V3.6</i>	Mandatory
options options []	List of options to be displayed inside the catalog. There must be a minimum of 2 options. <i>added in V3.6</i>	Mandatory
submit submit {}	The main submit button for this node. Which will be displayed on each one of the options. <i>added in V3.6</i>	Mandatory

message_catalog - options

Name	Description	Required
label string	Title of each option that will appear inside the catalog. <i>added in V3.6</i>	Mandatory
value string	Value that will be sent to the server if that option is selected. <i>added in V3.6</i>	Mandatory
imageUrl string	The url of the image that will be displayed on each option. It's not recommended to use images larger than 300kb. <i>added in V3.6</i>	Mandatory

MESSAGE_CATALOG - SUBMIT

Name	Description	Required
buttonText string	Text of the button that is used to select the option. It will appear on every option. We recommend not to exceed 15 characters. <i>added in V3.6</i>	Mandatory
action string	Action that will occur just after the submit button is clicked. 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 input_phone or not. <i>added in V3.6</i>	Mandatory
displayLegal boolean	Determines whether or not legal agreements should be displayed before the configured action. <i>added in V3.6</i>	Optional

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 (which is displayed using the catalog node) 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 been set during the chatbot conversation.

chatbot.json

```
{
  "version": "3.6",
  "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": "providerPlanCatalog"
},
"providerPlanCatalog": {
    "type": "message_catalog"
    "options": [
        {
            "label": "Business",
            "value": "businessPlan",
            "imageUrl":
"http://www.pngmart.com/files/7/Business-PNG-Background-Image.png"
        },
        {
            "label": "Pro",
            "value": "proPlan",
            "imageUrl":
"https://springcoupon.com/wp-content/uploads/2016/10/Name.com-discounts-
.PRO-domain-1.49-usd.png"
        },
        {
            "label": "Expert",
            "value": "expertPlan",
            "imageUrl":
"https://home.passle.net/wp-content/uploads/2016/03/super-clive-flying.p
ng"
        }
    ],
    "submit": {
        "buttonText": "Select",
        "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",
    "validation": {
      "pattern": "[A-Za-z]{15}",
      "error": "Please enter less than 15 characters without numbers
or symbols"
    }
  }
],
"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": "3.6",
  "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": "3.6",  
  "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"
    }
  ]
}
```

```
}  
  }  
}
```