Chatbot 3.8

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 *.j son 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 specify general specs or behaviours 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" added in V1.0	Mandatory
client string	Identify the Customer who owns this chatbot. Value: an existent customer UUID. added in V1.0	Mandatory
chatbotld 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. added in V1.0	Mandatory
launchNode string	Specify the first node to be launched when the chatbot starts. Value: an existent node identifier. added in V1.0	Mandatory
seeds seeds	Set all the available Seeds for the chatbot. Use them to redirect the user to one team or another. added in V1.0	Optional
nodes nodes	Object containing all the nodes. Added in V1.0	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	Id of an existent seed.	Mandatory
string	Added in V1.0	

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 <u>nodes</u> 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 behaviour 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.
- message_simple_dynamic: A dynamic simple text message.

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

message_button - option

Name	Description	Required
buttonText string	Text of the button. We recommend not to exceed 35 characters. added in V1.0	Mandatory
seed string	Id of a configured seed. When the customer clicks on this button, the session will be configured with the provided seed. added in V1.0	Optional
action string	One of either: • 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 whether the customer has already filled the input_phone or not. • schedule to schedule a session (in this case, it is mandatory to have previously declared an input_phone and input_datetime fields). added in V1.0	Mandatory
displayLegal boolean	Determines whether or not legal agreements should be displayed before the configured action. added in V2.1	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	Value: message_session_data	Mandatory
string	added in V1.0	
fields	Set all the fields for this form. We recommend not to use more than four fields on the same form.	Mandatory
fields []	added in V1.0	
submit	Set the main submit button for this form.	Mandatory
submit {}	added in V3.0	
alternateOptions	Set of all the alternate options for this message	Optional
alternateOptions [renamed in V3.0	
backup backup {}	Set the node to show if an error occurs during the request of the external select option. added in V3.4	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	Value: input_name added in V1.2	Mandatory
string		

mandatory boolean	True to make the field mandatory, false to make it optional added in V1.2	Optional default: true
validation	Custom validation rules to ensure the field is filled in using the correct format. **added in V3.5**	Optional
validation []		

MESSAGE_SESSION_DATA - FIELD - INPUT_PHONE

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

Name	Description	Required
type string	Value: input_phone added in V1.0	Mandatory
mandatory boolean	True to make the field mandatory, false to make it optional added in V1.2	Optional default: true
validation validation []	Custom validation rules to ensure the field is filled in using the correct format. added in V3.5	Optional

MESSAGE_SESSION_DATA - FIELD - CHECKBOX_PRIVACY_POLICY

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

Name	Description	Required
type	Value: checkbox_privacy_policy	Mandatory
string	added in V1.0	

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	Value: input_datetime	Mandatory
string	added in V2.0	

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	A unique identifier for the custom field.	Mandatory
string	added in V3.2	
type	Value: input_text	Mandatory
string	added in V3.2	
placeholder	The text to be displayed in the custom field when it's empty. Use it to describe the expected value of the input field.	Mandatory
string	added in V3.2	

mandatory	True to make the field mandatory, false to make it optional	Optional
boolean	added in V3.2	default: true
validation	Custom validation rules to ensure the field is filled in using the correct format.	Optional
validation []	added in V3.5	

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. added in V3.2	Mandatory
type string	Value: select added in V3.2	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. added in V3.2	Mandatory
mandatory boolean	True to make the field mandatory, false to make it optional added in V3.2	Optional default: true
options options[]/string	Predefined options to be selected in the custom field. One of the following: • Array with a minimum of 2 options • external to request the options from an external source modified in V3.4	Mandatory

message_button - field - options

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

MESSAGE_SESSION_DATA - SUBMIT

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

action	One of either:	Mandatory
string	 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. schedule to schedule a session (in this case, it is mandatory to have previously declared an input_phon e and input_datetime fields). 	
	added in V2.0	
displayLegal	Determines whether or not legal agreements should be displayed before the configured action.	Optional
boolean	added in V2.1	

MESSAGE_SESSION_DATA - ALTERNATE OPTIONS

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

MESSAGE_SESSION_DATA - BACKUP

Name	Description	Required
action	One of either:	Mandatory
string	• Id of a configured node to make a new chatbot interaction appear.	
	added in V3.4	

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. added in V3.5	Mandatory
Error	A custom error message to be displayed if the value introduced in the field is not valid.	Optional
string	added in V3.5	

Common regular expressions

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

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

Only letters without space with maximum length English characters	^[a-zA-Z]{0,20}\$	Check and tes
Only letters with spaces and maximum length	^[a-zA-Z\u00C0-\u00FF\s]{0,20}\$	Check and tes
Spanish characters		
Only numbers with maximum length	^[0-9\s]{0,10}\$	Check and tes
Email format	/^([a-z0-9_\\+-]+)@([\da-z\]+)\.([a-z\.]{2,6})\$/	Commo
Date format: dd-mmm-YYYY or dd/mmm/YYYY or dd.mmm.YYYY	/^(?:(?:31(V -\\.)(?:0?[13578] 1[02] (?:Jan Mar May Jul Aug Oct Dec)))\1 (?:(?:29 30)(V -\\.)(?:0?[1,3-9] 1[0-2] (?:Jan Mar Apr May Jun Jul Aug Sep Oct Nov Dec))\2))(?:(?:1[6-9] [2-9]\d)?\d{2})\$\partial^{?:29(V -\\.)(?:0?2 (?:Feb))\3(?:(?:(?:1[6-9] [2-9]\d)?\?(?:0)[48] [2468][048] [13579][26]))(?:(?:16 [2468][048] [3579][26])00))))\\$\partial^{?: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})\\$\/	Date example

message_simple

A simple text message shown to the customer.

Name	Description	Required
type	Value: message_simple	Mandatory
string	added in V1.0	
text	Text of the message.	Mandatory
string	added in V1.0	
action	One of the following:	Optional
string	 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. schedule to schedule a session (in this case, it is mandatory to have previously declared an input_phone and input_datetime 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. In this type of node the action starts automatically after a few seconds. 	
	added in V1.0. updated in v3.3	
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: • 5 for Sale • 4 for Valid • 3 for Invalid	Optional
	added in V3.3	

message_simple_dynamic

A simple text message shown to the customer.

Name	Description	Required
type	Value: message_simple	Mandatory
string	added in V3.8	
text	Text of the message. This text allows dynamic variables that can be interpolated within the chatbot inputs or within a external response.	Mandatory
string	To set a dynamic variable you need add variable inside brackets {{ }} like:	
	Thanks for contacting use, please use this code: {{codeVariable}} to enter a new session	
	*Bear in mind that any variable without matching will be deleted.	
	added in V3.8	
action	One of the following:	Optional
string	 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. schedule to schedule a session (in this case, it is mandatory to have previously declared an input_phone and input_datetime 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. 	
	In this type of node the action starts automatically after a few seconds.	
	added in V1.0. updated in v3.8	
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: • 5 for Sale • 4 for Valid	Optional
	3 for Invalid	
	added in V3.8	

message_link

A message with text and a set of clickable links.

Name	Description	Required
type	Value: message_link	Mandatory
string	added in V1.1	
text	Text of the message. Use this property to provide a description about the subsequent links.	Mandatory
string	added in V1.1	

action	One of the following:	Optional
string	 Id of a configured node 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.	
	added in V1.1. updated in v3.3	
resultCode	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.	Optional
number	One of the following: • 5 for Sale • 4 for Valid • 3 for Invalid	
	added in V3.3	
links	List of links to show.	Mandatory
link []	added in V1.1	

message_link - link

Name	Description	Required
linkText	Visible text of the link.	Mandatory
string	added in V1.1	
linkUrl	Target URL of the link.	Mandatory
string	added in V1.1	

message_inbound

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

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

MESSAGE_SESSION_DATA - ALTERNATE OPTIONS

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

message_catalog

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

Name	Description	Required
type	Value: message_catalog	Mandatory
string	added in V3.6	
options	List of options to be displayed inside the catalog. There must be a minimum of 2 options.	Mandatory
options []/ string	One of the following: • Array with a minimum of 2 options • external to request the options from an external source (requires Widget v1.27.0 or higher).	
	modified in V3.7	
submit	The main submit button for this node. Which will be displayed on each one of the options.	Mandatory
submit {}	added in V3.6	
backup backup {}	Set the node to show if an error occurs during the request of the external option . added in V3.7	Mandatory only if options:'external'

message_catalog - options

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

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.	Mandatory
String	added in V3.6	
action	Action that will occur just after the submit button is clicked.	Mandatory
string	One of either:	
	 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 whether the customer has already filled the input_phone or not. 	
	added in V3.6	
displayLegal	Determines whether or not legal agreements should be displayed before the configured action.	Optional
boolean	added in V3.6	

MESSAGE_CATALOG - BACKUP

Name	Description	Required

action	One of either:	Mandatory
string	Id of a configured node to make a new chatbot interaction appear.	
	added in V3.7	

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 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": "3.8",
  "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"
        }
      1
      "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"
      1
    },
    "chatConfirmation": {
      "type": "message_simple",
      "text": "Great! You will be attended in a moment",
      "action": "start"
    },
    "phoneMessage": {
      "type": "message_simple_dynamic",
      "text": "Provide your phone number so that one of our experts can
call you to finish the contract within the #planName# you have choosen",
      "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. Also, there is a catalog where the customer can choose which device they are interested in.

```
chatbot.json
  "version": "3.8",
  "client": "6b4ae9d1-3f71-43de-9981-683aaa128748",
  "chatbotId": "telcoShop",
  "seeds": {
    "mobileTeam": {
      "seed": "58107f8c-c930-453b-a253-d63b165c3a62"
    "internetTeam": {
      "seed": "d4ff7a14-fdf2-45c2-9e87-074c7d841c77"
    },
    "devicesTeam": {
      "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": "Devices",
          "seed": "devicesTeam",
          "action": "devicesCatalog"
      ]
```

```
"devicesCatalog": {
      "type": "message_catalog",
      "backup": {
        "action": "devicesCatalogBackup"
      },
      "options": "external",
      "submit": {
        "buttonText": "Select",
        "action": "phoneMessage"
    },
"devicesCatalogBackup": {
      "type": "message_catalog",
      "options": [
          "label": "Zphone S",
          "value": "ZPhoneS",
          "imageUrl": "https://www.images.com/zphoneS.jpg"
        },
          "label": "Zphone M",
          "value": "ZPhoneM",
          "imageUrl": "https://www.images.com/zphoneM.jpg"
        },
          "label": "Zphone L",
          "value": "ZPhoneL",
          "imageUrl": "https://www.images.com/zphoneL.jpg"
        }
      ],
      "submit": {
        "buttonText": "Select",
        "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": "3.8",
  "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"
    }
  ]
```

```
}
}
```