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1. Create a chatbot (outer section) faq

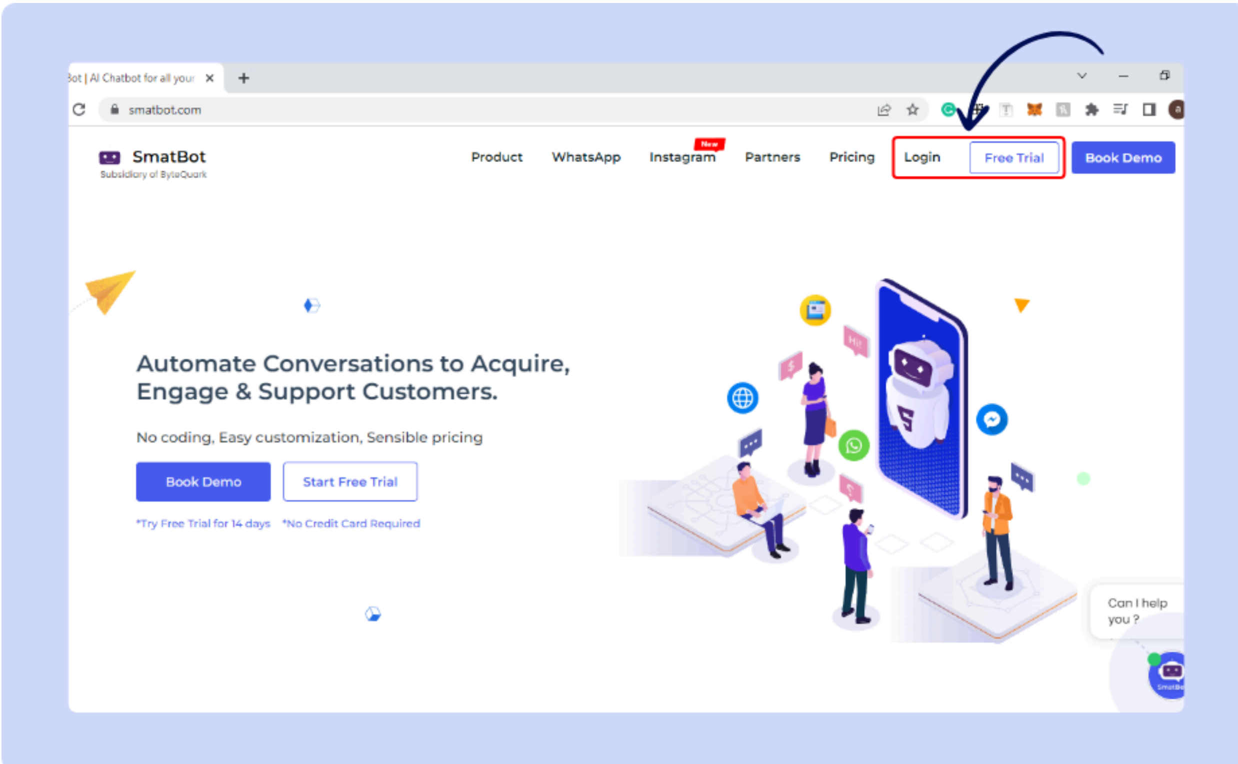
Hello, welcome to SmatBot!

SmatBot is a chatbot platform that you can use to design omnichannel and multilingual bots in just a few minutes.

To begin, follow the steps below or watch the video above.

Step 1 :

- Sign Up on our Website
- Log In to our Dashboard.



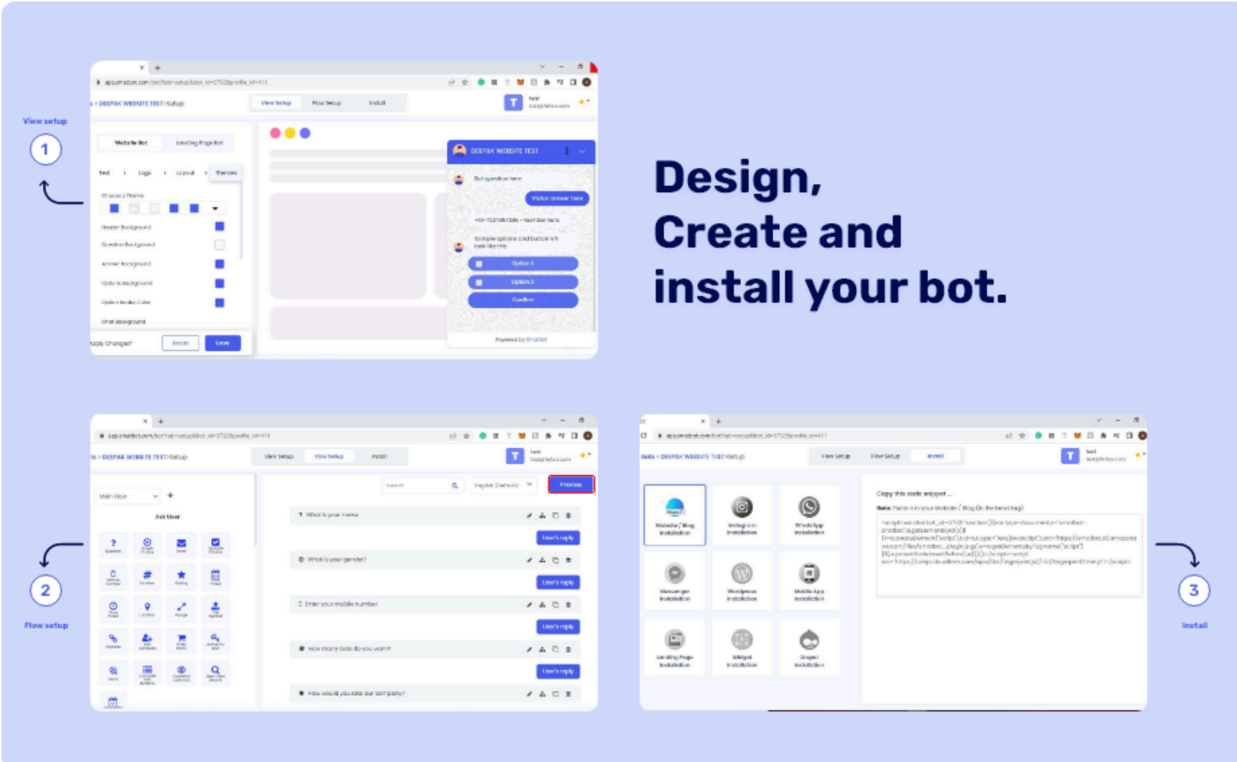
Step 2

- Click on **Create New Bot.**
- Choose between:
    - **Lead Generation Bot (or) Any Data Collection Bot**
    - **Customer Support Bot.**
- Choose between
    - **Pick From Templates** to use a predefined template (or)
    - **Create Your Own Bot** to start from scratch.

Step 3

- Name your Chatbot.

Step 4



- Create & and install your bot.
    - View Setup - Design the look and feel of your bot. For more details, click here.
    - Flow Setup - Design the content of your bot. For more details, click here.
    - Install - Follow platform specific instructions to install your bot. For more details, click here.

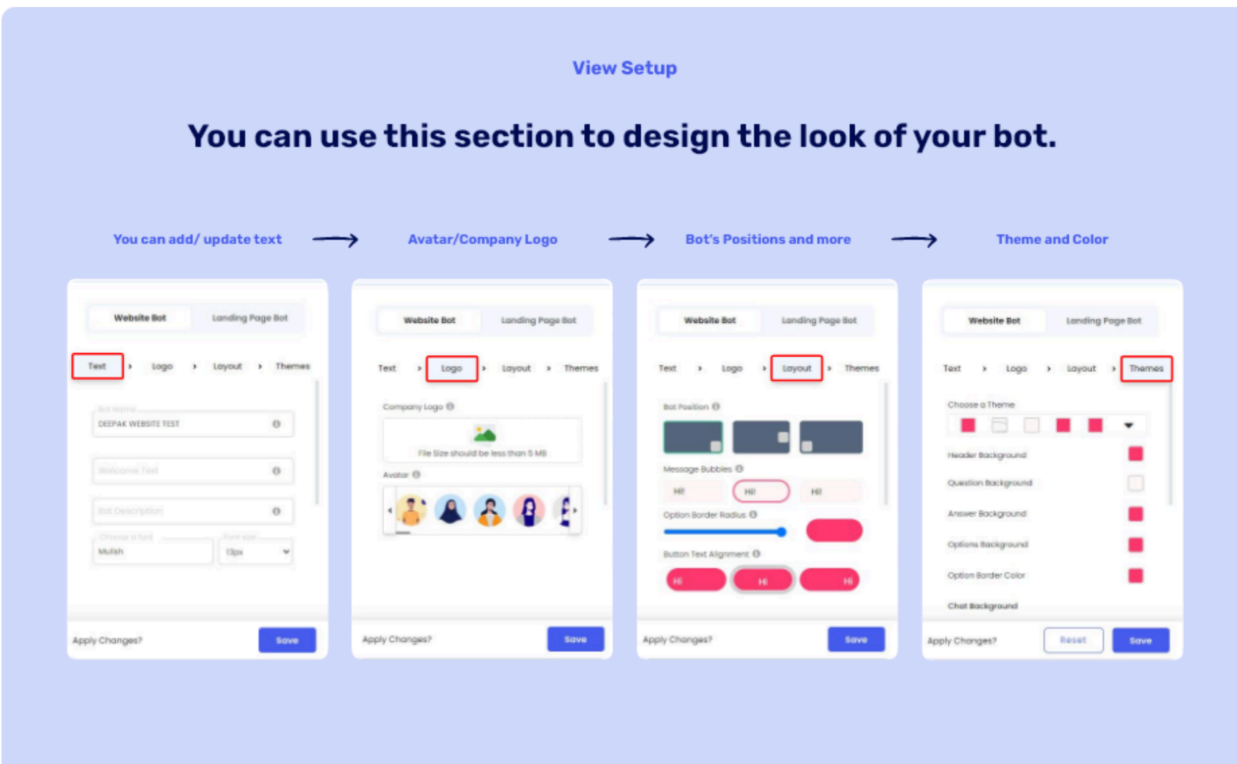
- Note: The preview on the right-hand side of the page shows you the changes in real-time as you make them.

Voilà! Your bot setup is complete. For any further questions/enquiries, please contact us at support@smatbot.com.

View Setup

- **Post video (30 sec)**

You can use this section to design the look of your bot. Follow the video guide above or the steps below to learn more.



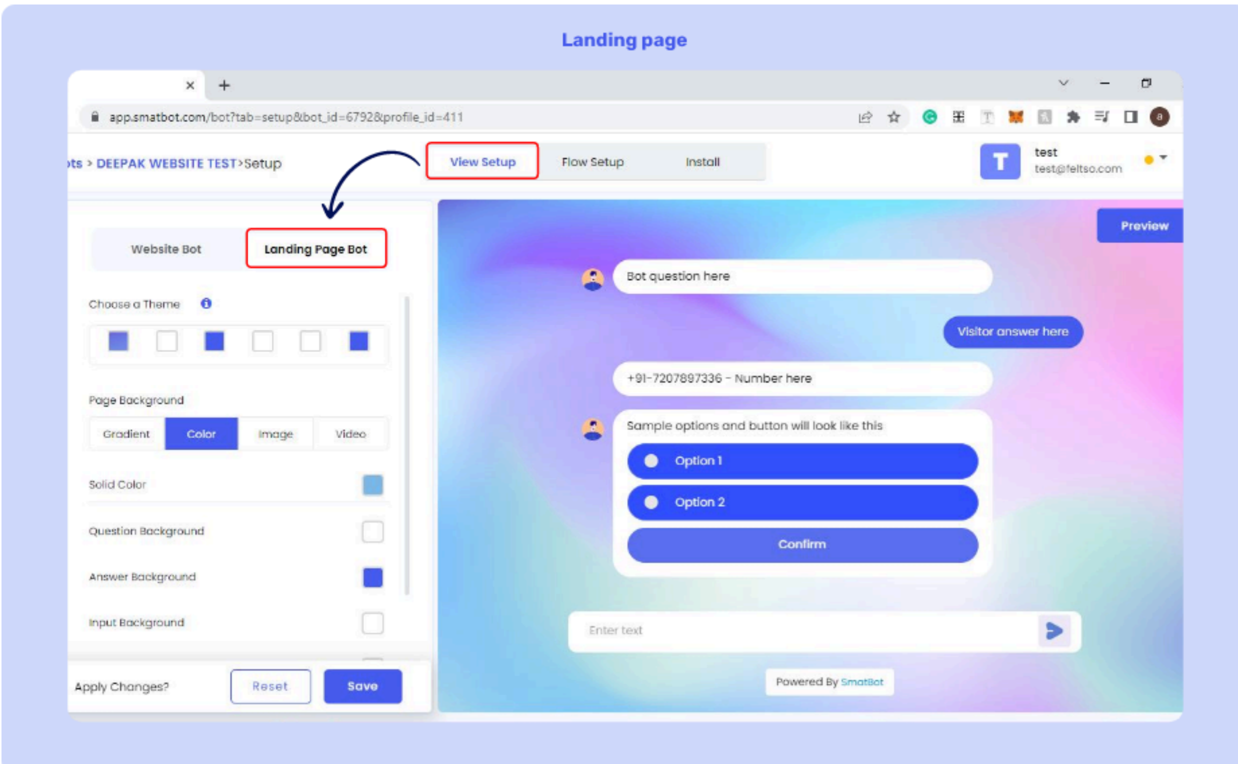
1. You can add/alter:
    i. Welcome Text, Font and Font Size
    ii. Avatar/Company Logo
    iii. Bot's Position
    iv. Theme and Color

- Once you are satisfied with the changes, click on save. You can always alter any of these settings later (even post installation).

Interactive landing page

- Post video (20 sec)

You can use SmatBot to make an entire landing page an interactive bot. To do this, simply follow the video guide above or the steps listed below.



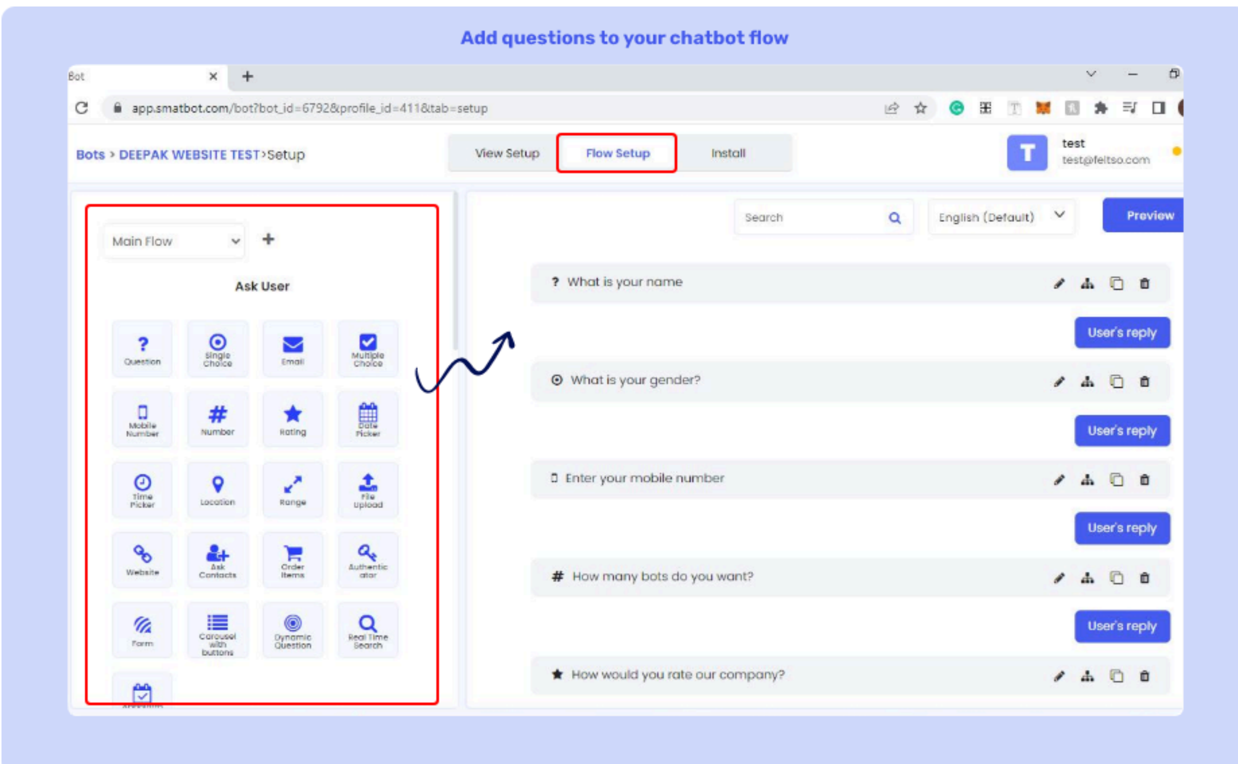
- Step 1:
  - Click on the **Landing Page** section of View Setup in the dashboard. Edit the theme/colours etc to create the look you want.
- Step 2
  - Go to Flow Setup and design the content of the bot. [Click here](#)for a detailed guide on question types.
- Step 3:
  Go to the Install section and then click on **Landing Page Installation**. Copy and paste the link in your browser.

Amazing! You have successfully created an Interactive Landing Page Bot. You can use this link in emails, messages and much more.

Flow Setup - Basic Features

Add questions to your chatbot flow. To begin, follow the steps below or watch the video above.

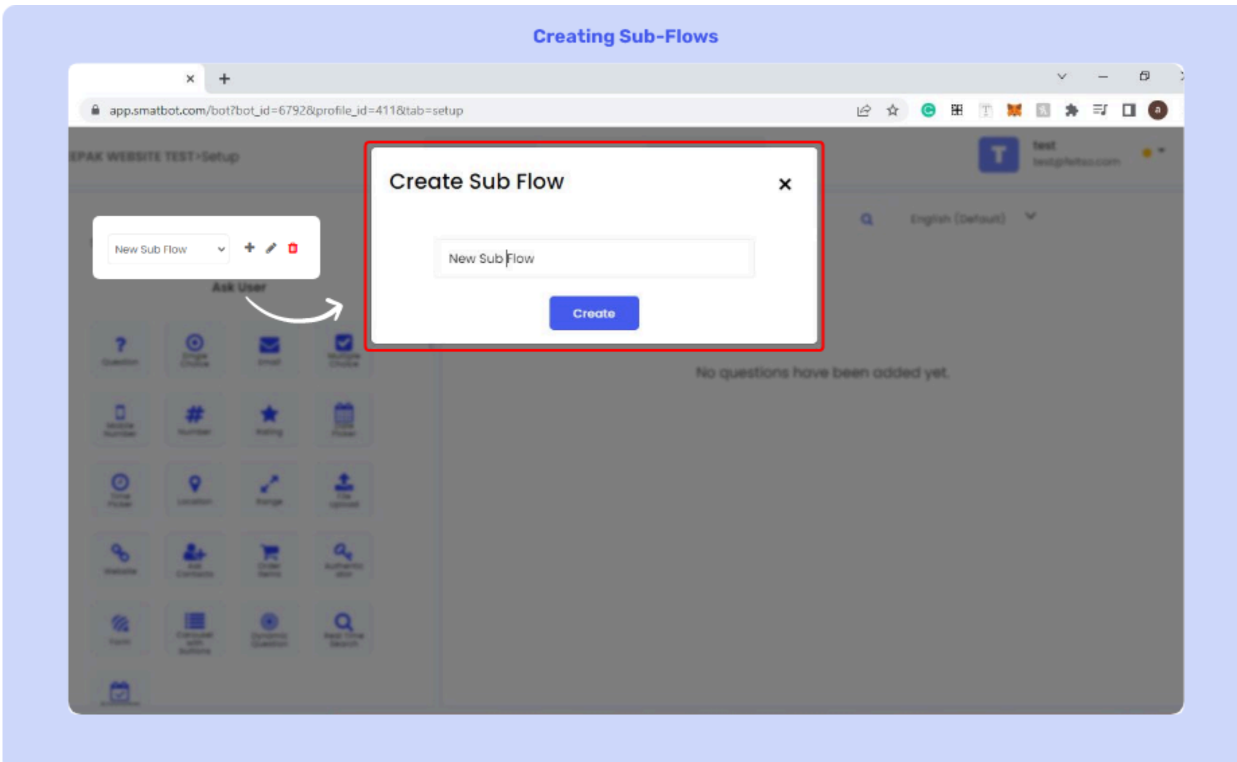
For a detailed guide on different question types, please [click here]()



a. Ask User
   i. Ask your user for inputs such as emails, phone numbers, button clicks etc.
b. Show User
   i. Show your user images, videos, files, etc.
c. Setup Menu Optionshttps://www.feltso.com/help_center_desc/AI_ChatBots
   i. Setup quick actions on your bot. For a detailed guide, [click here]().
d. FAQ's Setup
   i. Setup Frequently asked questions. For a detailed guide, [click here.]()
e. AI-enabled
   i. Add AI to your bot. For a detailed guide, [click here]().
f. Live Agent
   i. Add Human agents to your bot. For a detailed guide, [click here]().

g. Only for WhatsApp
    i. Special features applicable only for WhatsApp bots. For a detailed guide, click here.
h. Only for Instagram
    i. Special features applicable only for Instagram bots. For a detailed guide, click here.

2. Creating Sub-Flows. Sub-Flows can be created to stay organized and keep unrelated aspects separate (E.g. two different flows for two different products)



    a. Click on the '+' icon Next to the 'Main Flow' dropdown box to create a Sub-Flow.
    b. Add a name and click on create.
    c. Add question types the same way as above.

General Notes:

1. **You can either drag and drop or click on a question type to add it to the flow.**
2. You can edit/duplicate/delete your questions. You can also attach images or GIFs to your questions.
3. You can Bold/Italicize/Underline the content.
4. You can use **Data Referencing** to use data from a previous answer (E.g. Name) throughout the flow.

5. You can set up **Conditional Flows** to trigger different flows based on the user's response. (By default, the questions will flow as per the order in the dashboard)

Once you are satisfied with the changes, click on preview to see how your bot would look. You can always alter any of these settings later (even post installation)

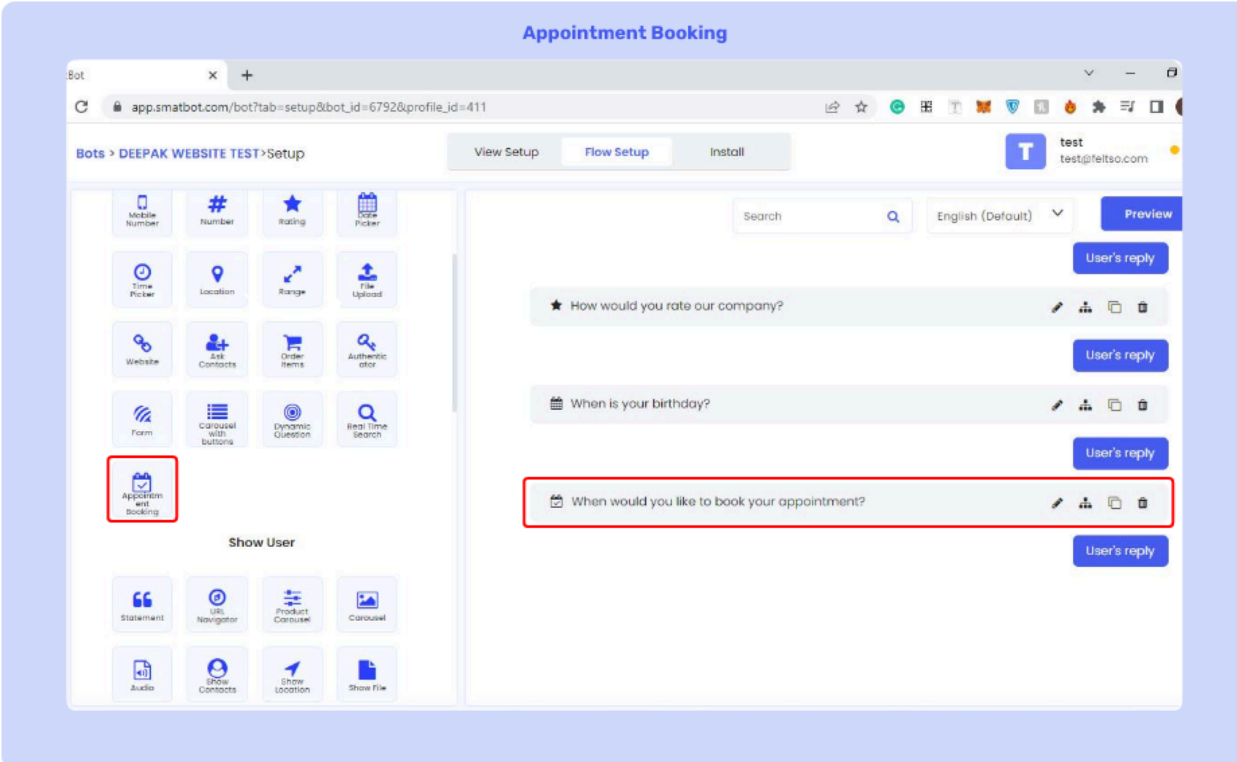
Flow Setup - Advanced Features

Appointment Booking
*add video here

Use this question type to set up appointment booking on your bot. To begin, follow the steps below or watch the video above.

Step 1

Click the **Appointment Booking** Question type in the dashboard.



Step 2

Integrate your appointments with Google or Outlook Calendar.

Step 3

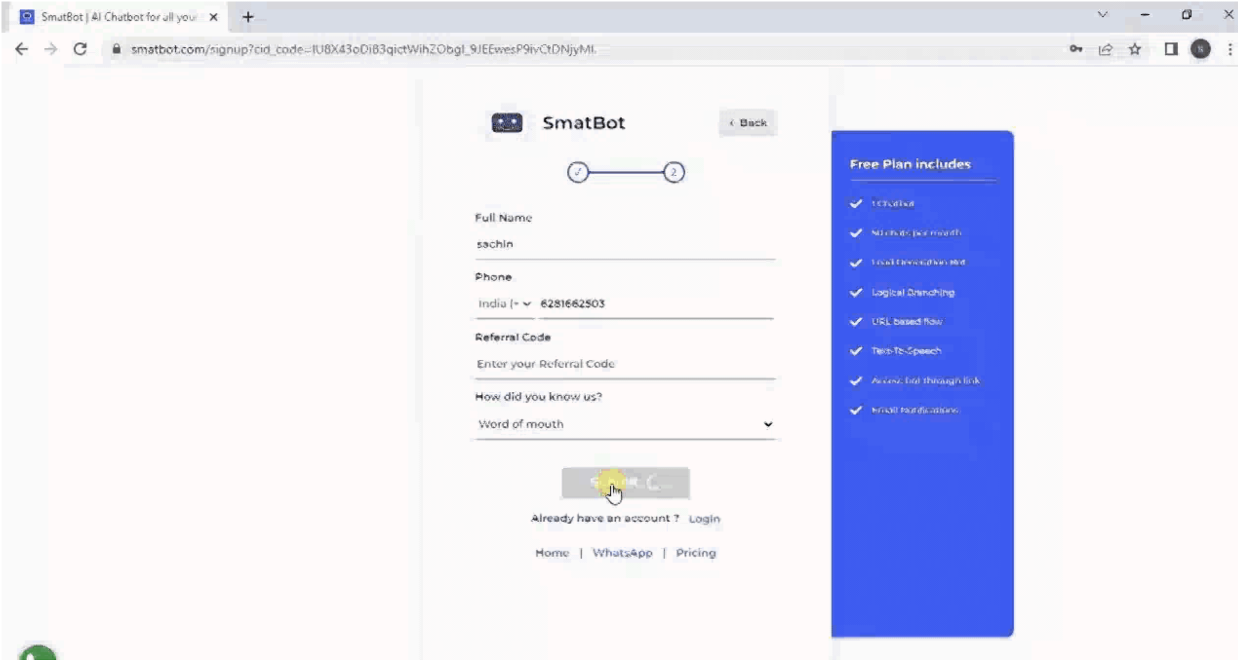
Adjust all the settings as required. Enable specific days, time zones, slots & more to match your requirements. In the case of a booked or unavailable slot, indicate the message which will be displayed to the user.

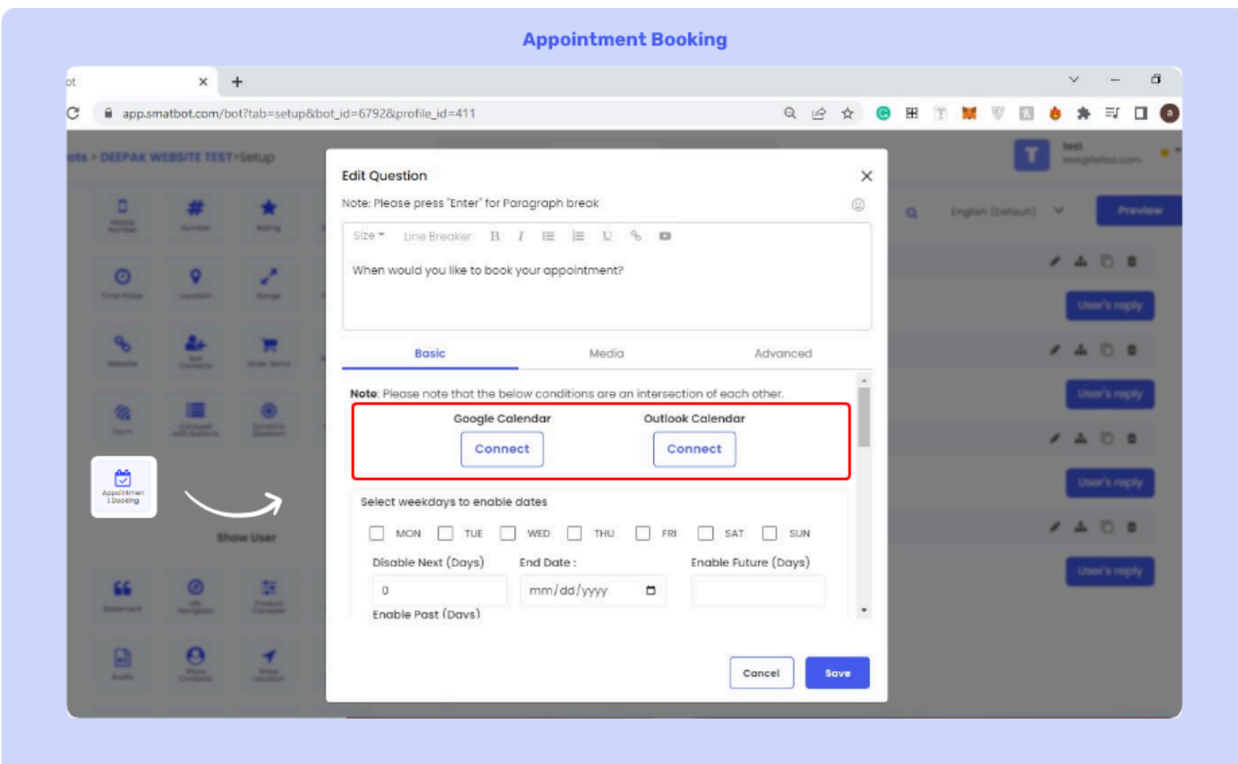
Step 4

Set a Title & Description for your meeting. Use a physical address or a virtual link to add to the meeting invite.

Click **save** once you are done.

Step 5





Integrate the calendar into the question. Allow all the settings and continue.

Step 6

The calendar has been successfully integrated, and you have set up appointment booking on your bot.

Note: Whenever an appointment is made, you and the recipient will receive an email invite and have the event show up on your calendar.

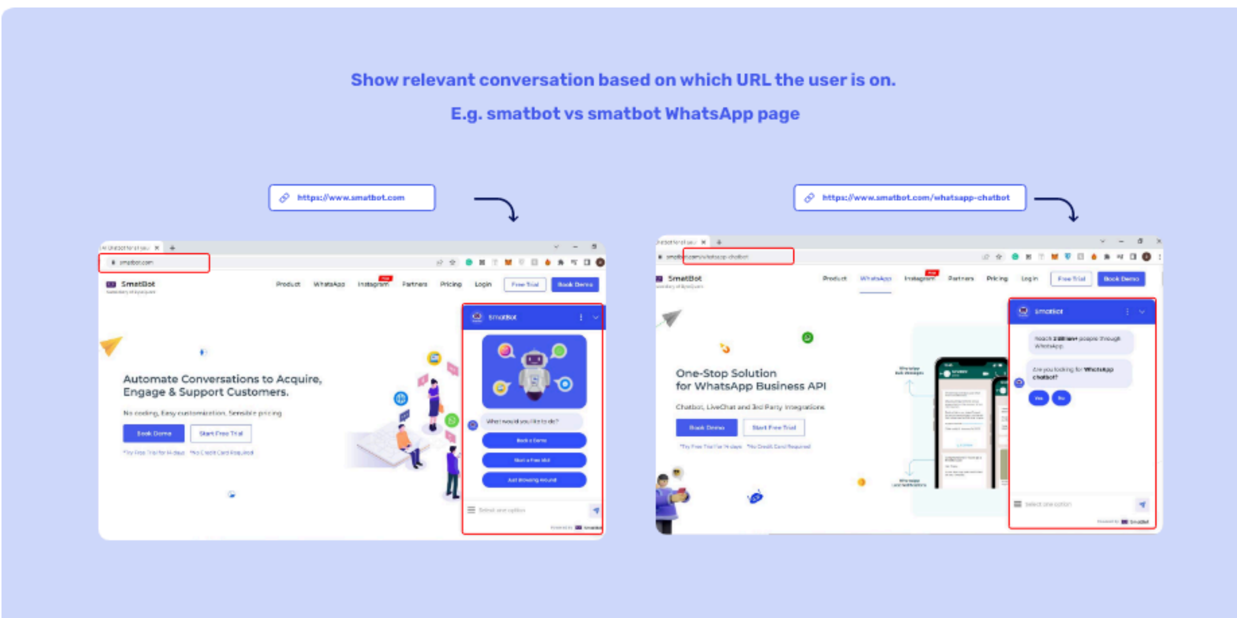
URL/Country/Action based flow

- Add video

Alter your flow based on:

1. URLs - show relevant conversation based on which URL the user is on. E.g. Careers page vs Contact us page
2. Actions - show relevant conversation based on the user's actions.
3. Country - relevant conversation based on which country the user is browsing from. E.g. Price in USD vs Rupees.

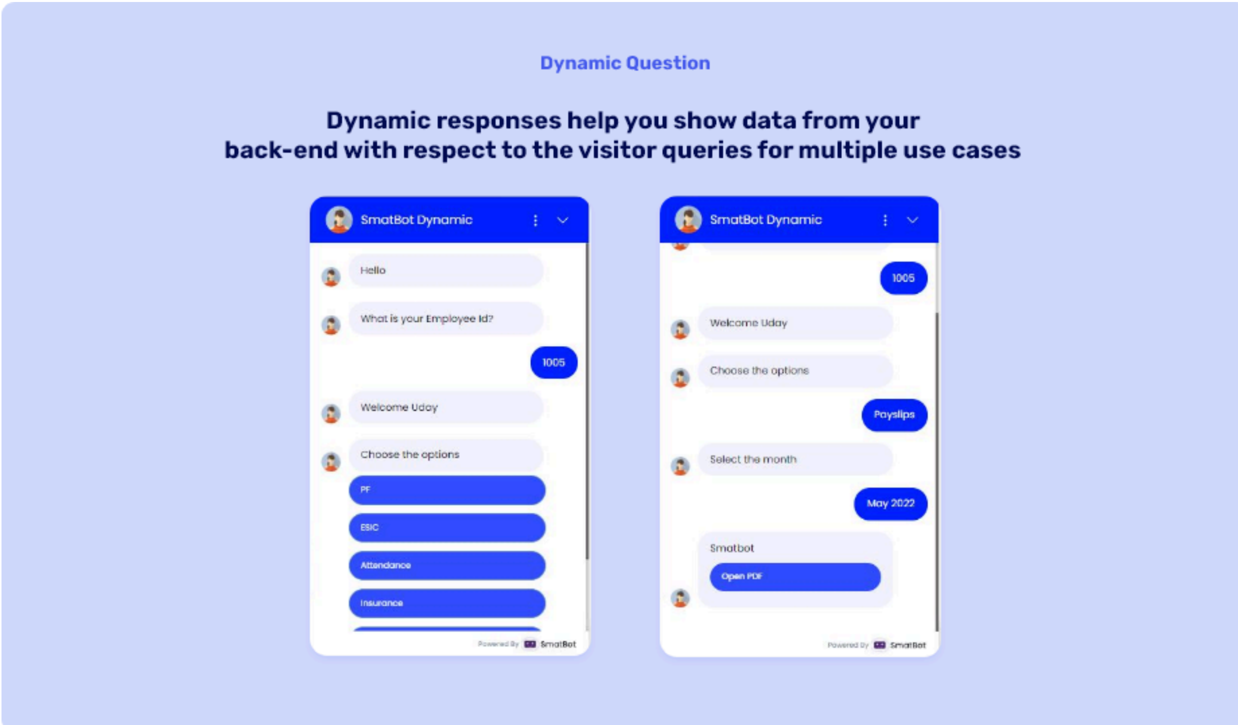
*add image here



Dynamic Questions

- Add video

*add image here



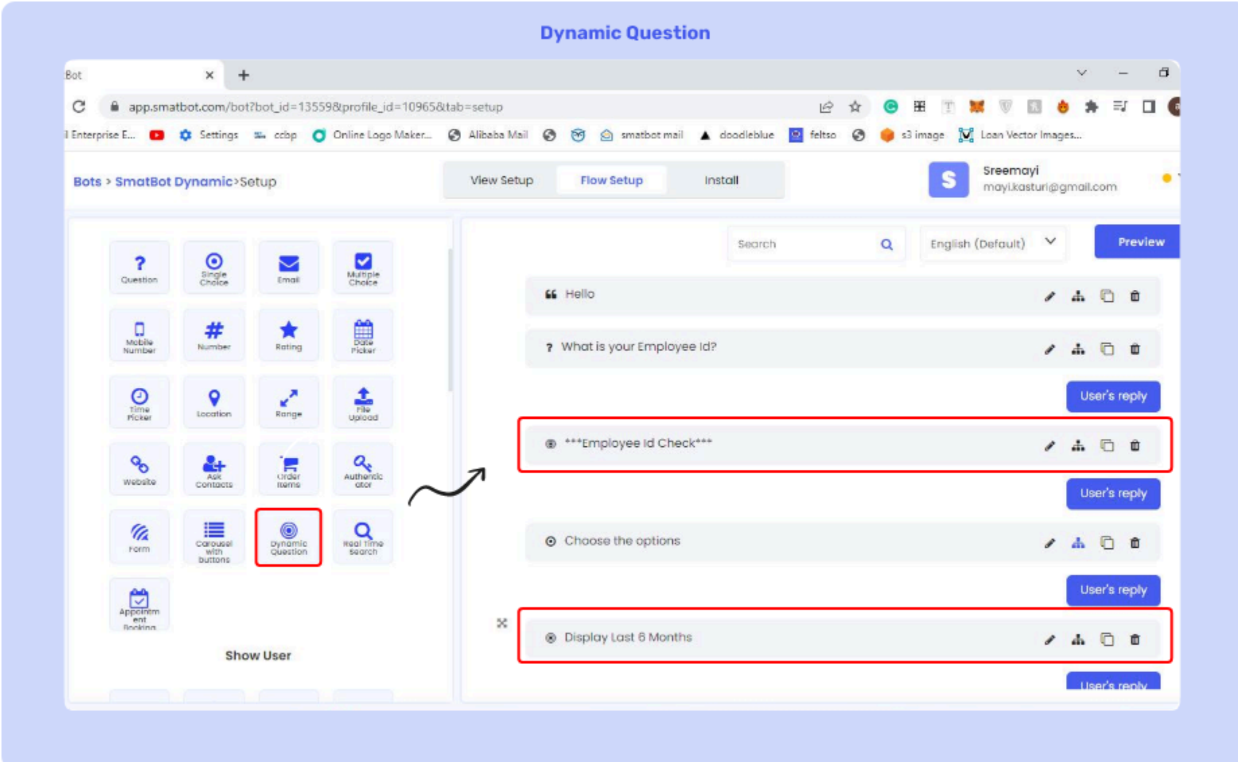
Dynamic responses help you show data from your back-end with respect to the visitor queries for multiple use cases ranging from 'Location-Based Responses', 'Order Status' to 'Fully Automated Support'.The setup is divided into two sections:

- Dynamic Question Setup in SmatBot
- Sending Responses from your Endpoint

Dynamic Question Setup in SmatBot

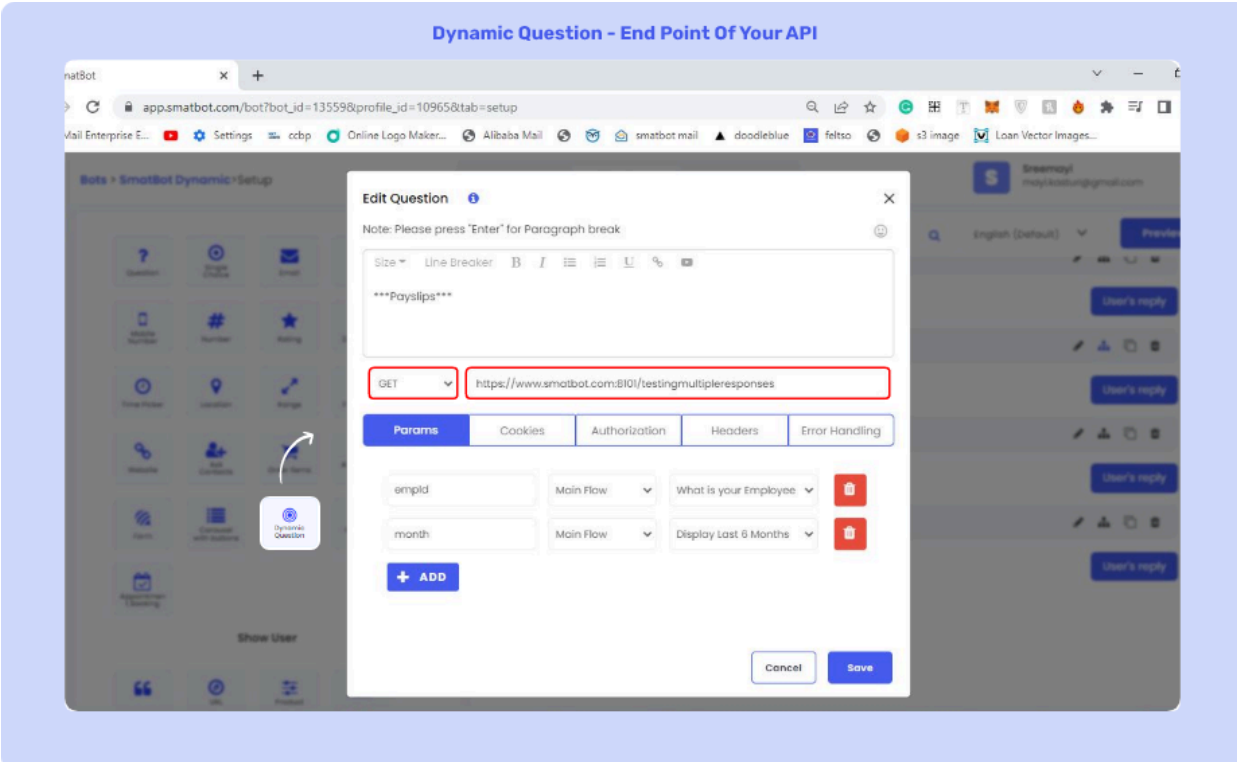
Step 1 :

Add the dynamic question to your question flow and proceed to the setup process.



Step 2

Type in the details of your endpoint in the API section for sending data.

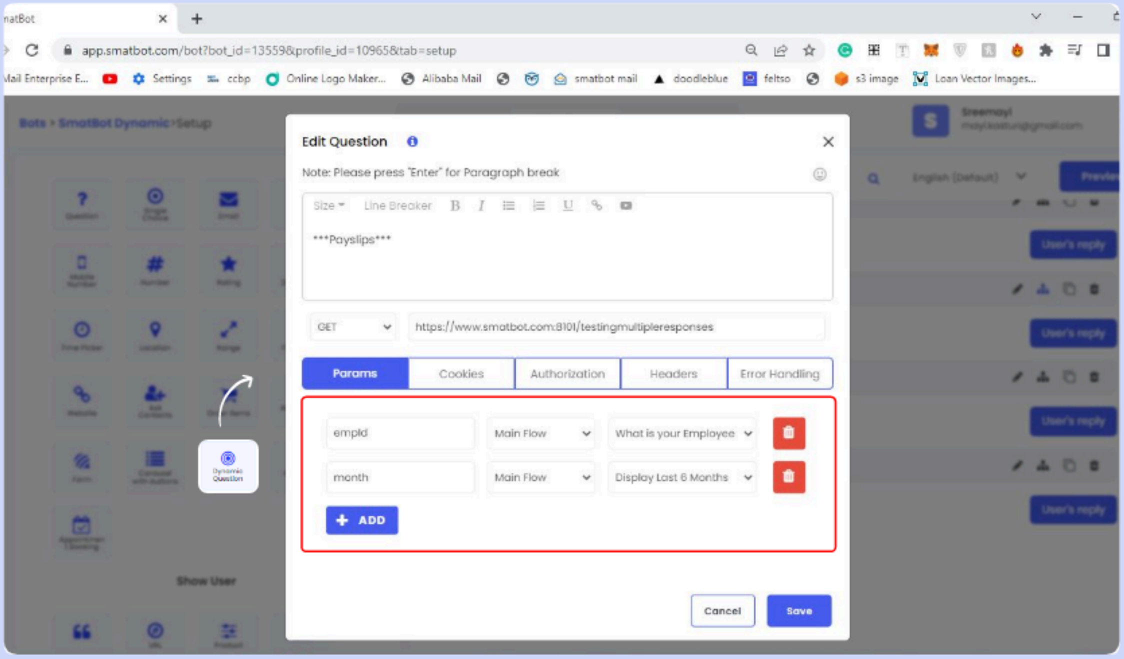


Step 3

Add input fields to define the context before sending the required data to your API endpoint from SmatBot. If you have a static value to send, add it in the format listed below.

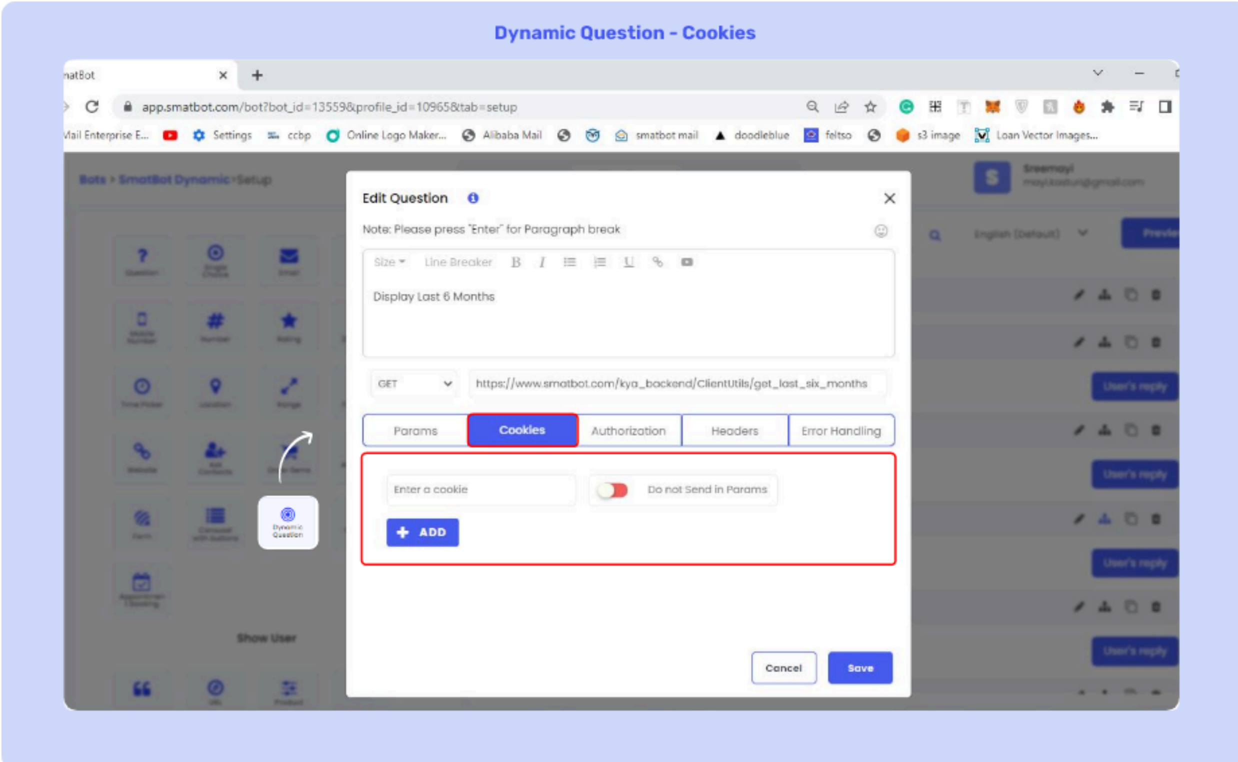
Select the **Static Text** question from the dropdown and enter your key and value in **key=value** format.

Dynamic Question - Input fields to define context



Step 4 (Optional)

In the case that you are using SmatBot on a login page, you can identify the user logged in and ask SmatBot to send cookies data instead of explicitly asking them who they are.



How To Send Response from your API Endpoint

Step 1

- You can use snippets from [this document]() to send a custom response to SmatBot.
- If you need to send any static parameters, select **Static Text** and then give the parameter a value in the following format: **parameter_name=parameter_value**

You can refer to the example below.

If your response format looks like this:

```
{
 "slides": [{
   "option": "OrderID#1230",
   "image_url": "https:\/\/s3.ap-south-1.amazonaws.com\/custpostimages\/ladies_top_1.jpg"
  },{
```

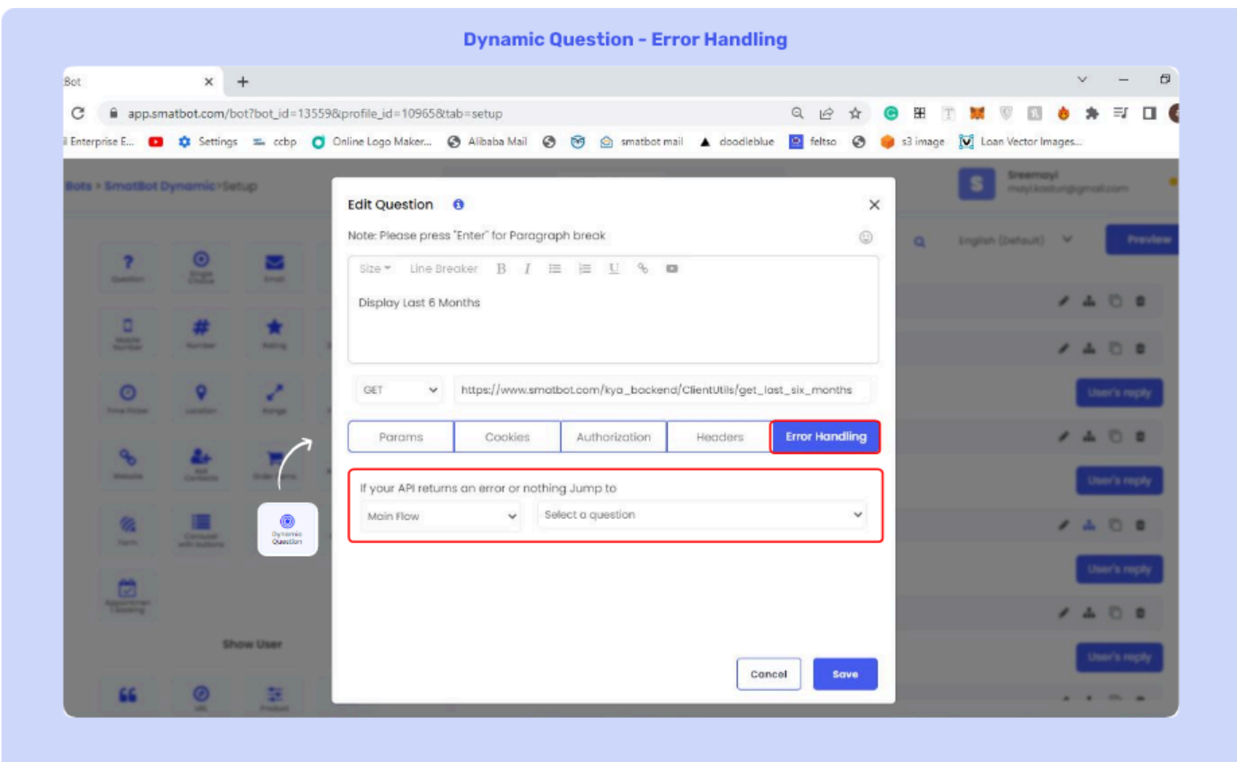
```
   "option": "OrderID#1231",
   "image_url": "https:\/\/s3.ap-south-1.amazonaws.com\/custpostimages\/ladies_top_2.jpg"
  }],
 "image_url": "",
 "question_text": "Can you select the order you facing trouble with Mrs samantha",
 "type": "radio_slides"

}
```


SmatBot will show your response like this.

Error Handling

If the response returns an error to SmatBot, it is handled as shown in the image below.

- Add image

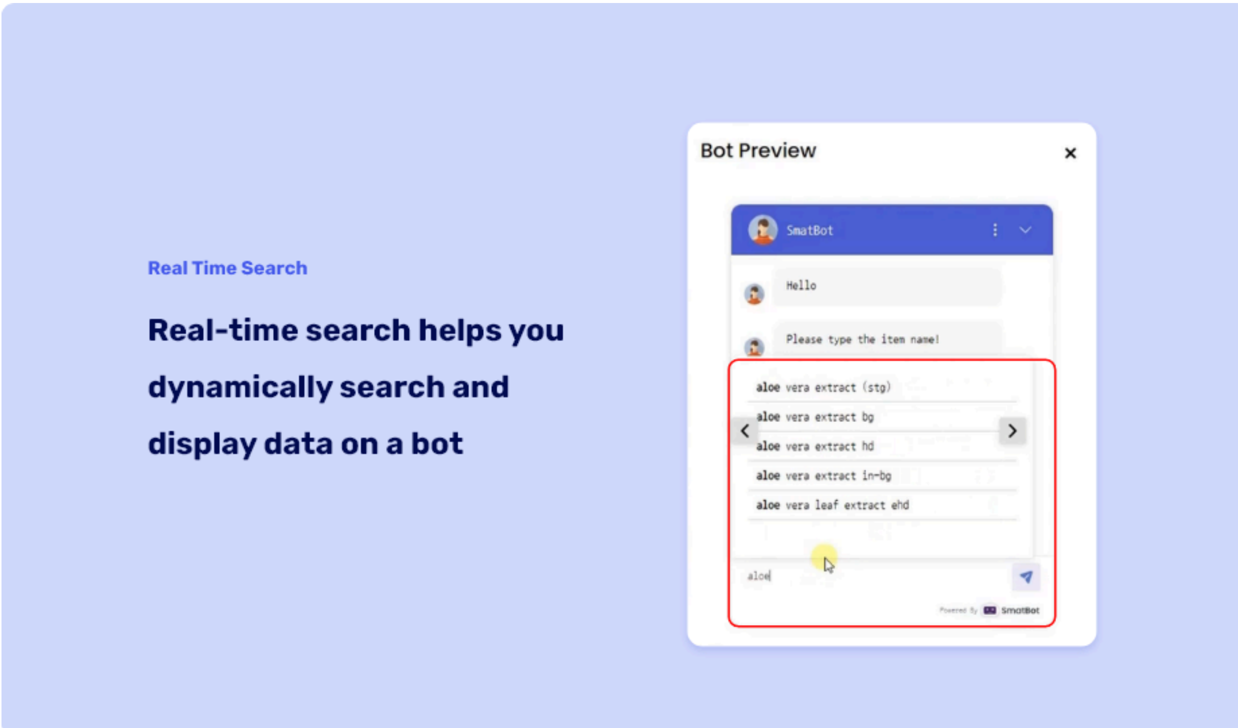


Any response code other than '200' will be considered as an error.

Real time search

- Add video

*add image here



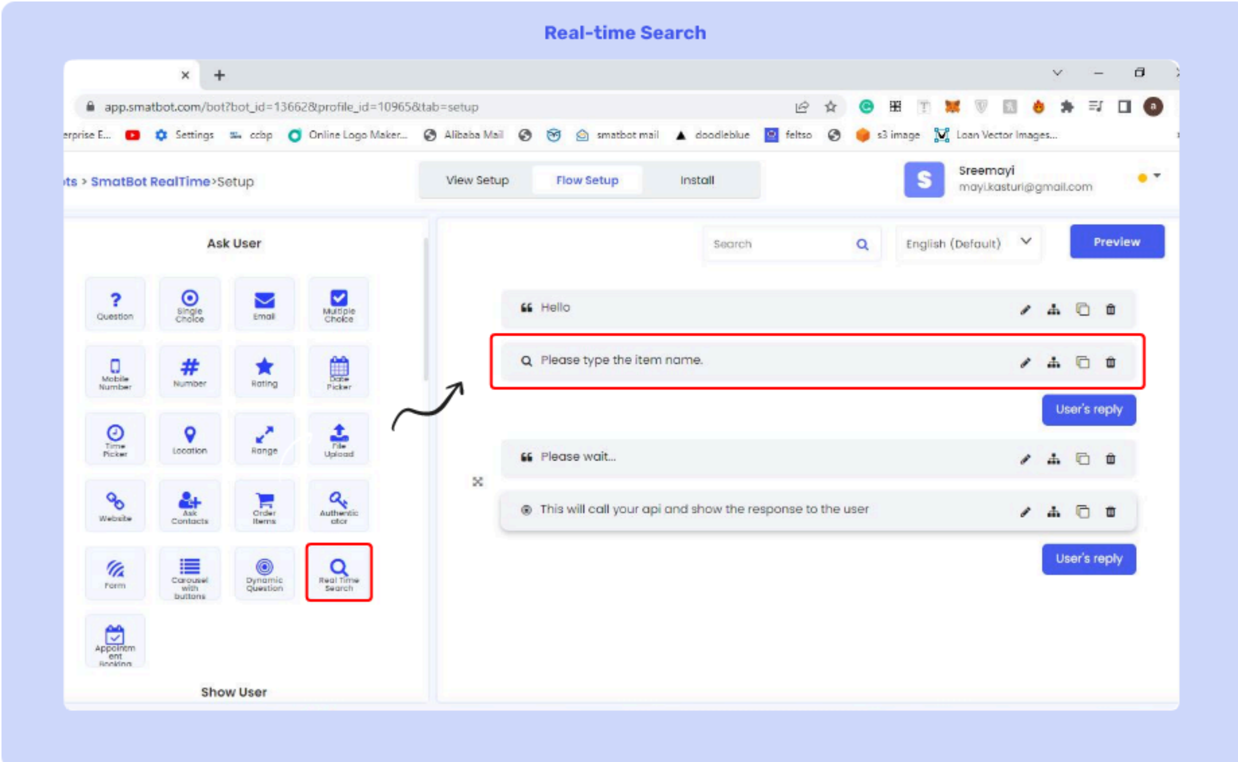
Real-time search helps you dynamically search and display data on a bot. The setup is divided into two parts:

- Real-time search setup in SmatBot.
- Sending Responses from your Endpoint.

Real-time Search Setup in SmatBot

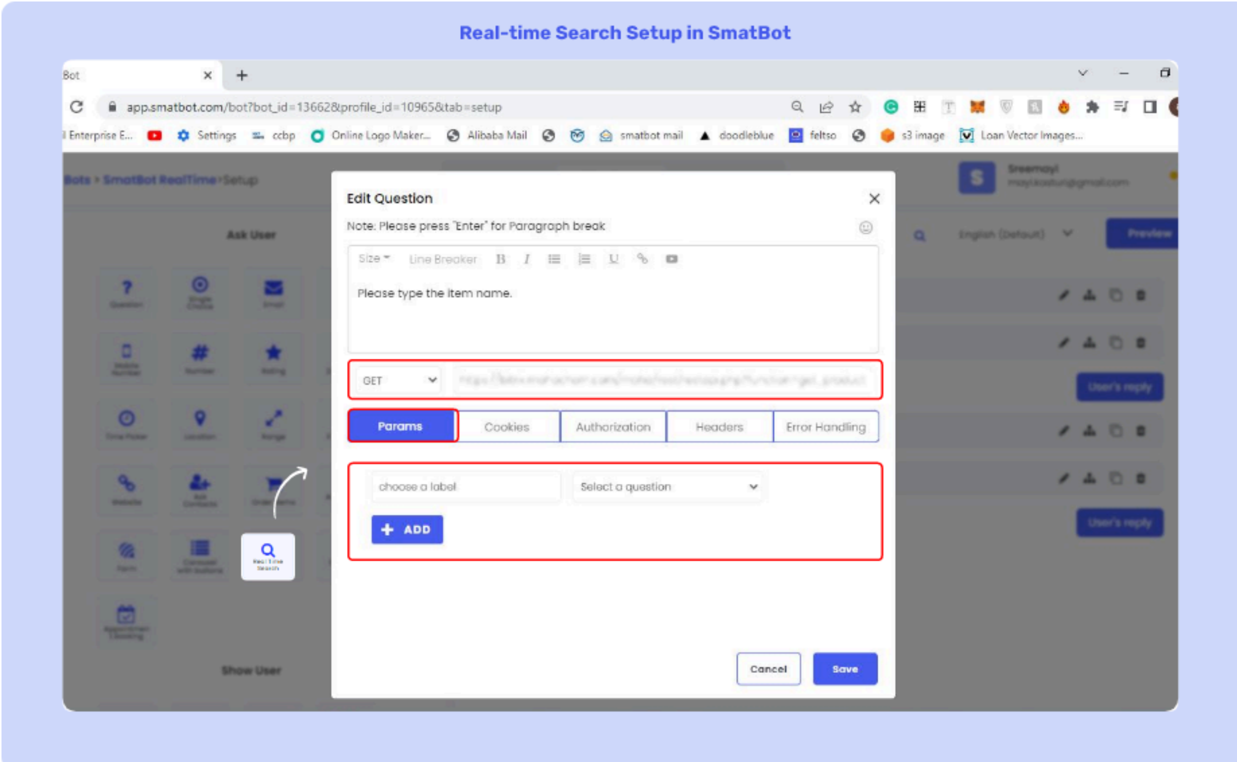
Step 1 :

Add Real-time search in your question flow and proceed to the setup process.



Step 2

Type in the details of your **endpoint in the API** section to send the data.



Step 3

Next, add columns below the endpoint to send the required data to your API endpoint from SmatBot.

Step 4

Give names to your cookies and send them directly to your API.

Send Responses from your Endpoint(Client-Side)

You need to return a list of all items as an array. This list will show up as a selectable dropdown.

- image

Response Format Example

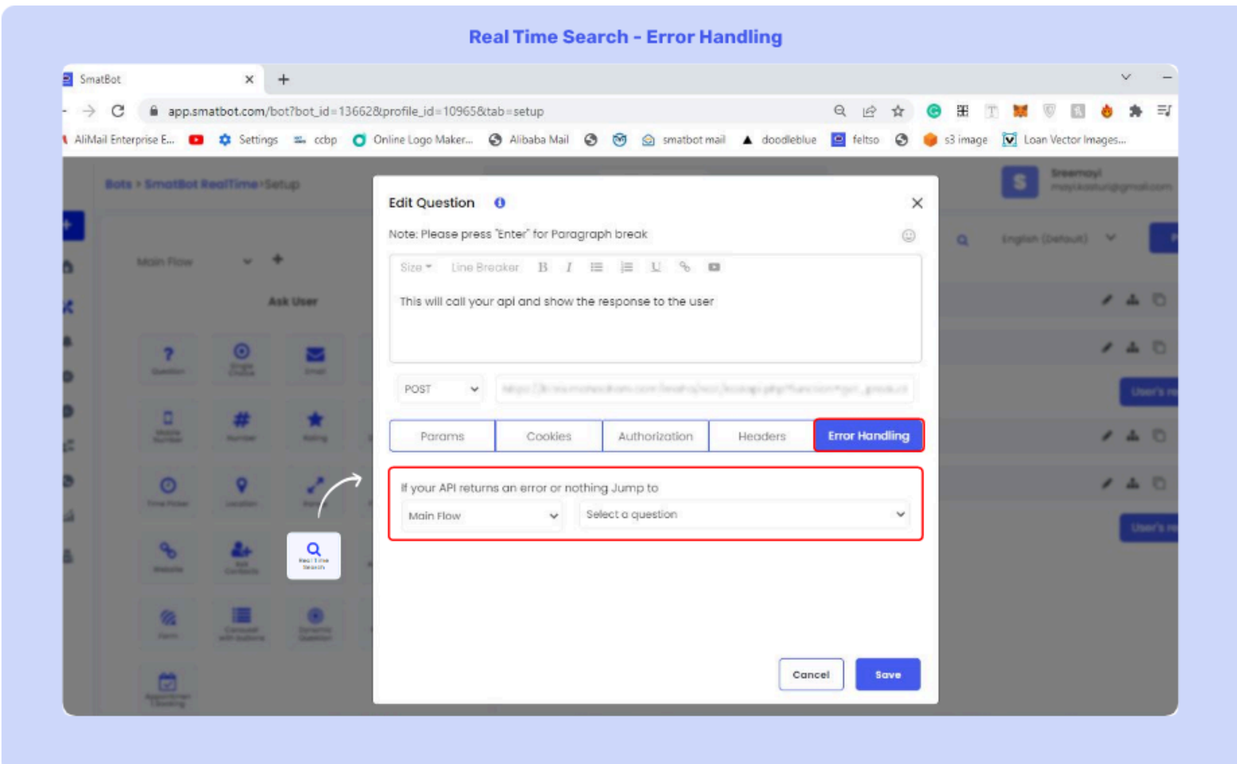
Response format:
{
  items_list:["one item","second item","third item"]

}

Error Handling

If the response returns an error to SmatBot, it is handled as shown in the image below.

- Add image



Any response code other than '200' will be considered as an error.

Setup Menu

- Add video

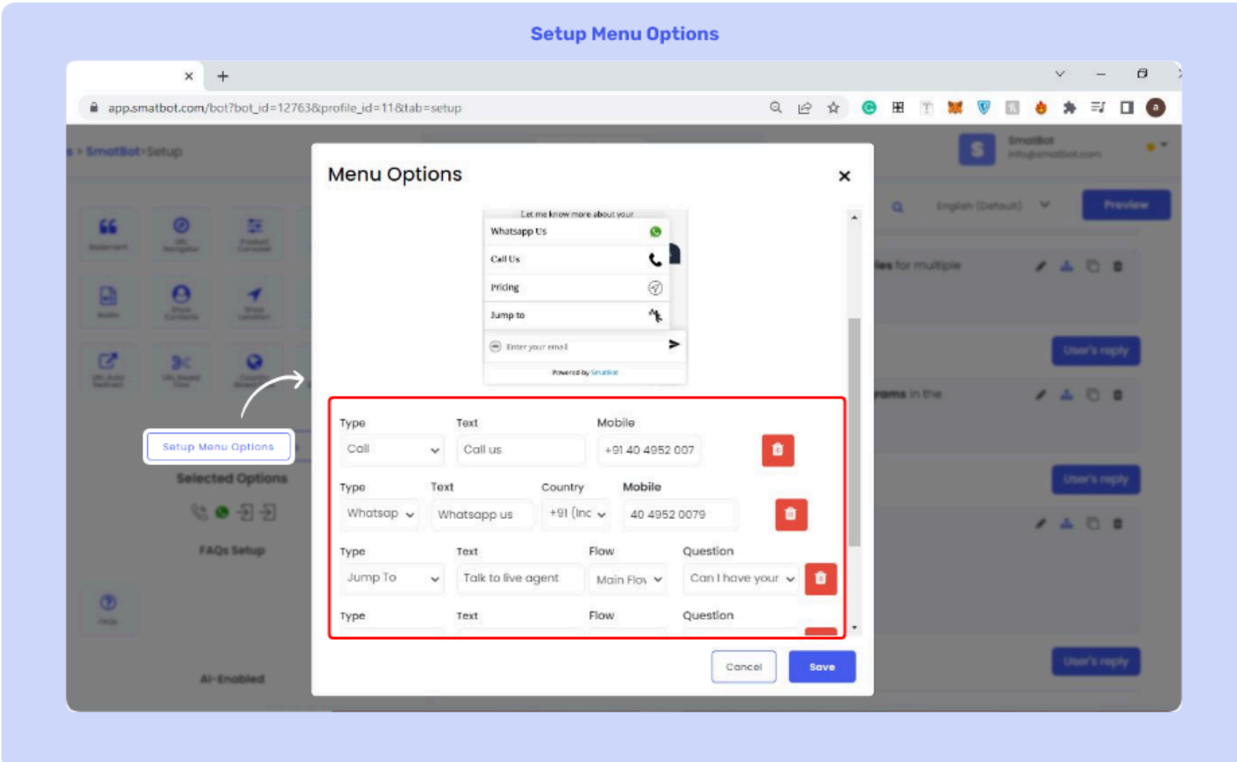
Add a Setup Menu to your bot to make certain actions easier for the user to do. Follow the video above or guide below to set this up.

Step 1

Once you login into your account, navigate to the setup section of your bot.

Step 2

Now, click on **Flow Setup**, scroll down the question types, and click on **Setup Menu Options** and configure the options based on your preference.



You can add the following options.

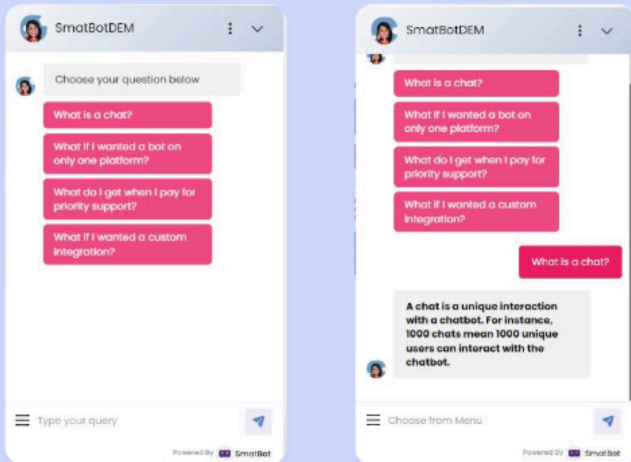
1. **Call**: Initiate a call directly from the chatbot.
2. **WhatsApp**: Send a direct Whatsapp Message.
3. **Tawk.to**: Redirect your users to a tawk.to live agent in real time.
4. **Zendesk**: Redirect your users to a Zendesk live agent in real time.
5. **URL**: Redirect your users to a Website or a URL.
6. **Jump To**: Send your users directly to a question in the chatbot flow.

FAQs Setup

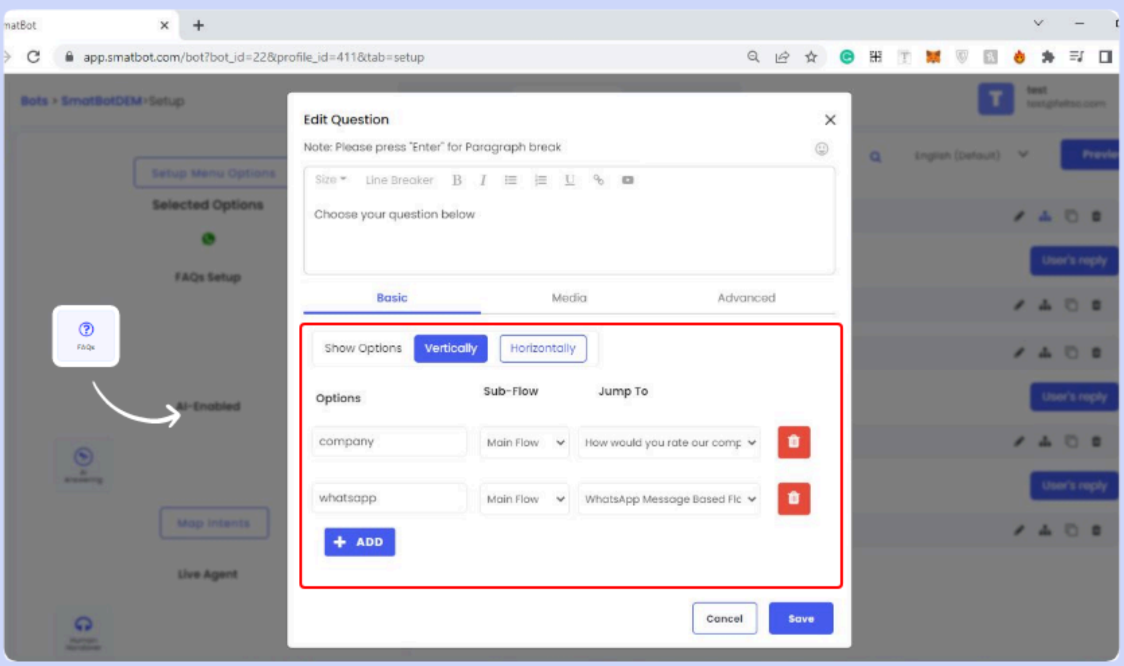
- Add video

FAQs Example

An Omni-channel chatbot can be pre-defined to answer basic to complex queries.



FAQs Setup



You can use this question type to have your frequently asked questions appear on the screen even after an option is chosen for easy back-and-forth navigation.

Step 1
Login to Smatbot

Step 2

Create a Customer Support Bot.

Step 3

Name your bot.

Step 4

Create your bot flow as per your requirements.

Step 5

Add the FAQ's question type to the top of your flow. Add all the options and relevant jumps.

Step 6

Great! You have set up FAQ's successfully on your bot.

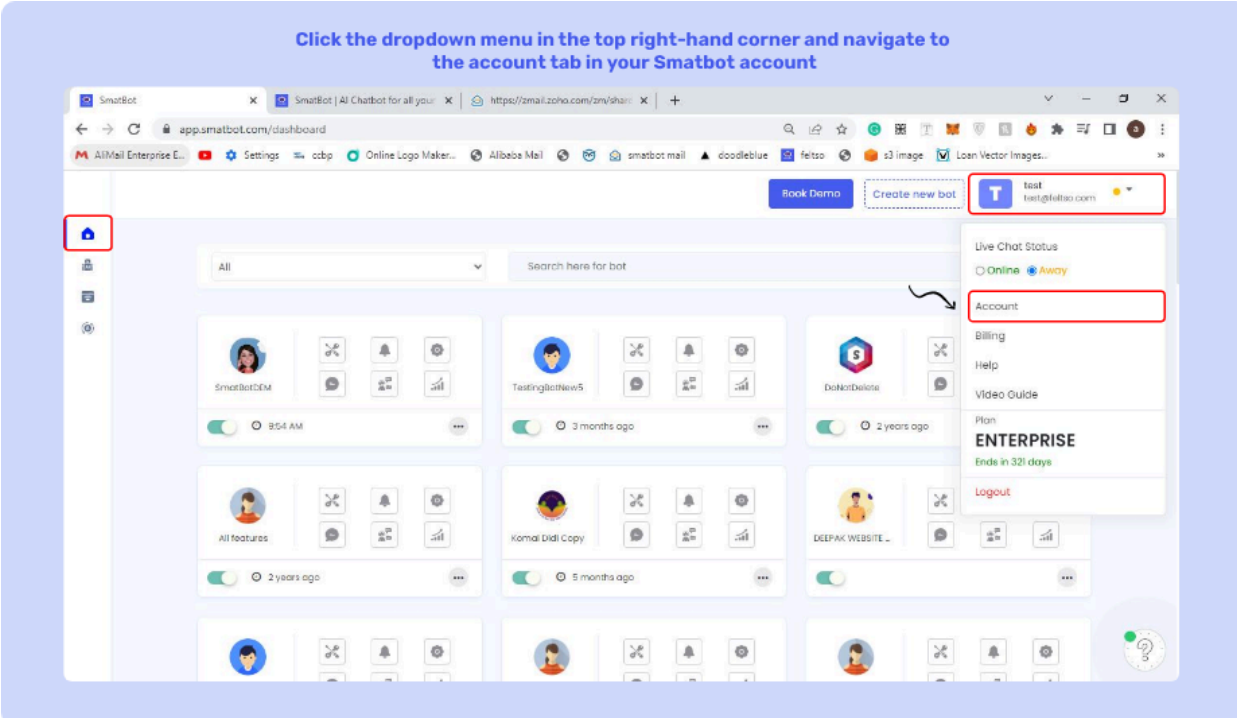
Email Follow-ups

- Add video

Automatically send an email follow-up to a user who leaves behind their email address.

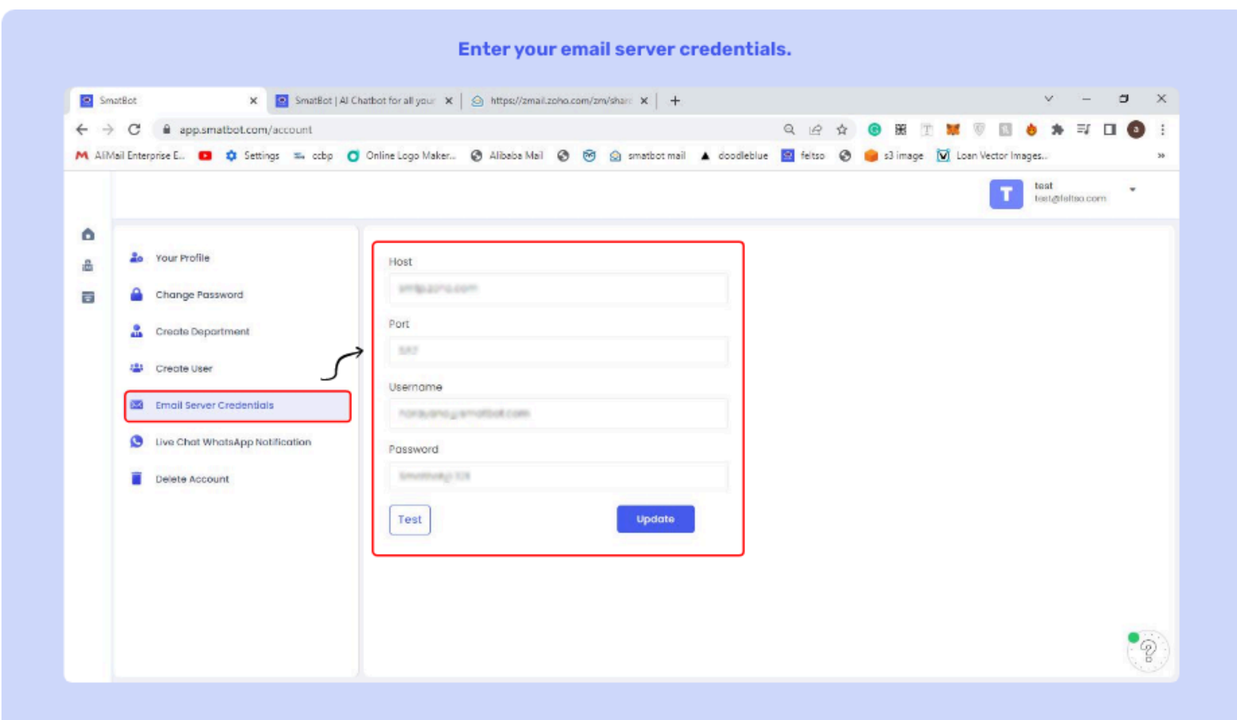
Step 1:

Login to your SmatBot account and navigate to the **Account tab ⇒ Email Server Credentials** tab.



Step 2:

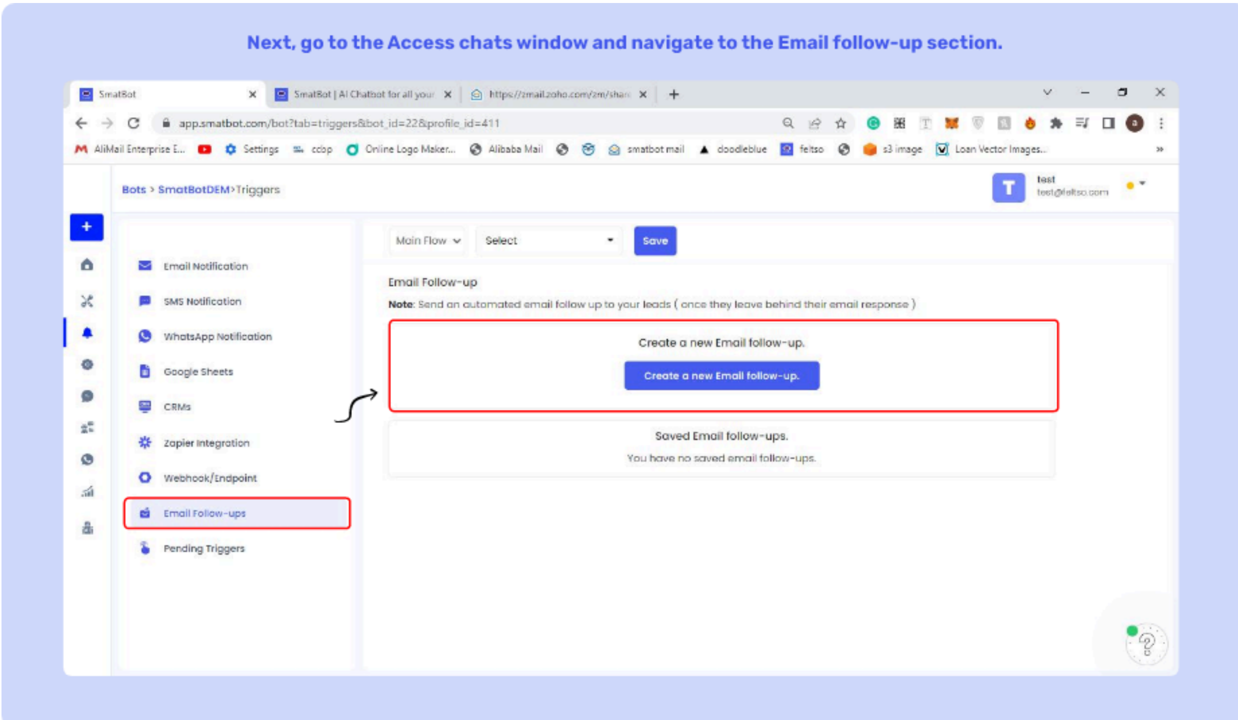
Type in the credentials of your Email Server.



Please refer to this guide if you are having any issues with this setup.

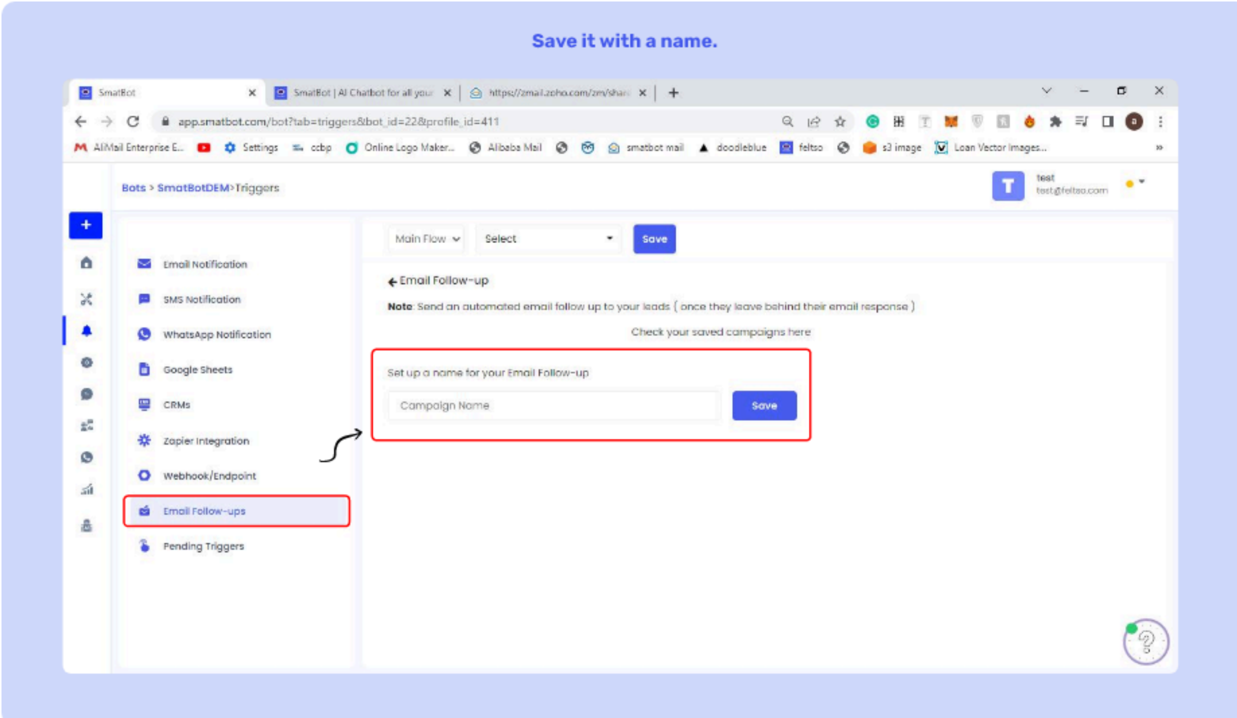
Step 3:

Next, go to the '**Triggers**' section and navigate to '**Email follow-up**'.



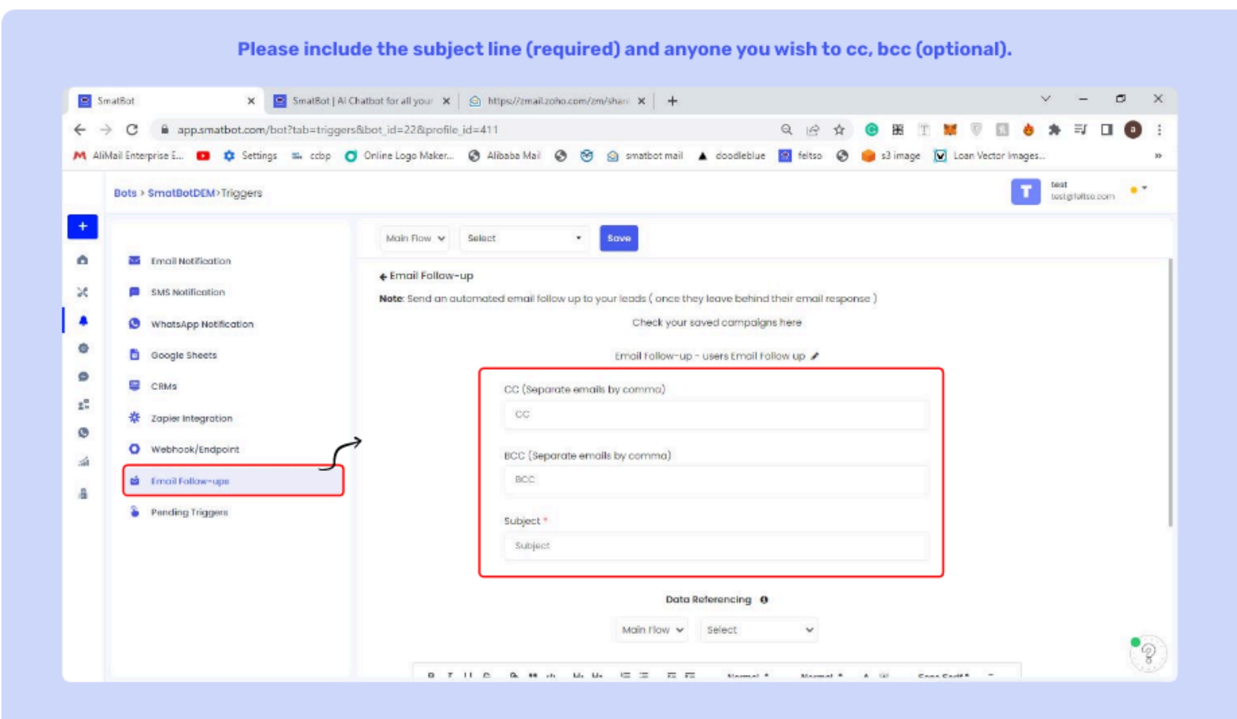
Step 4:

Click on **Create a new Email follow-up**, name your campaign, and then click on **Save.**



Step 5:

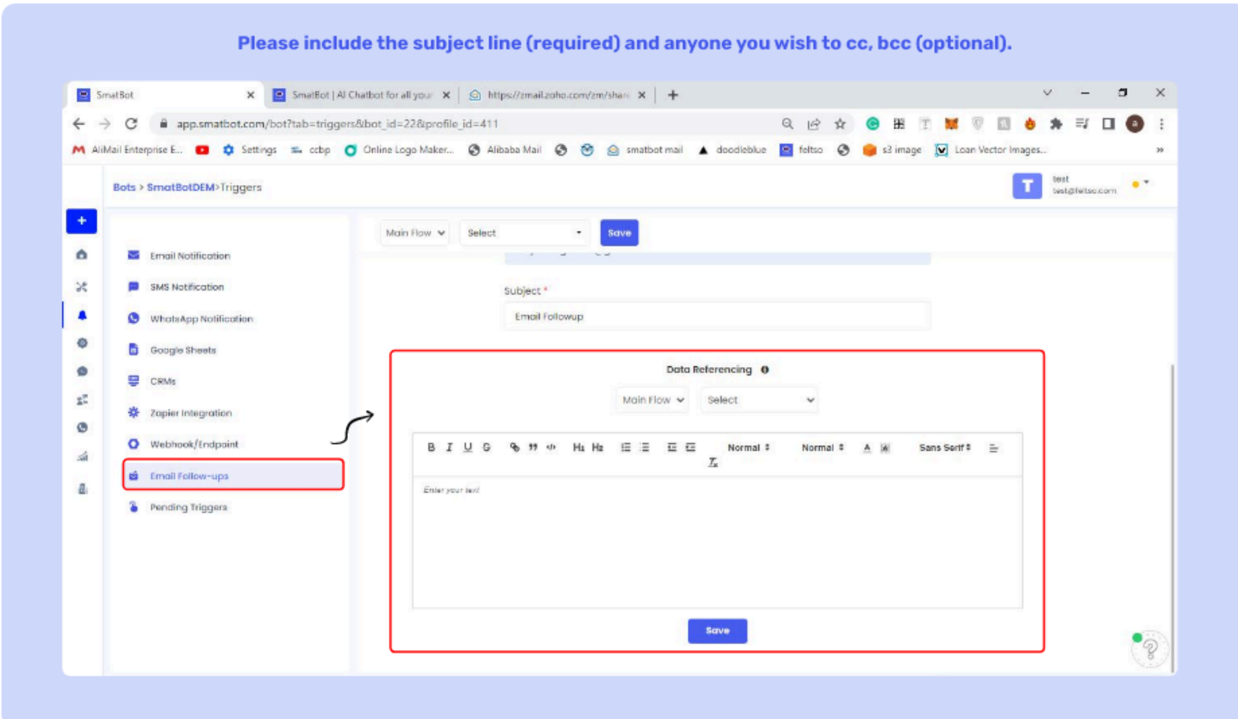
Type in the subject line (mandatory), and add any email addresses you would like to CC or BCC (optional).



Step 6:

Draft the email and then click on **Save.**

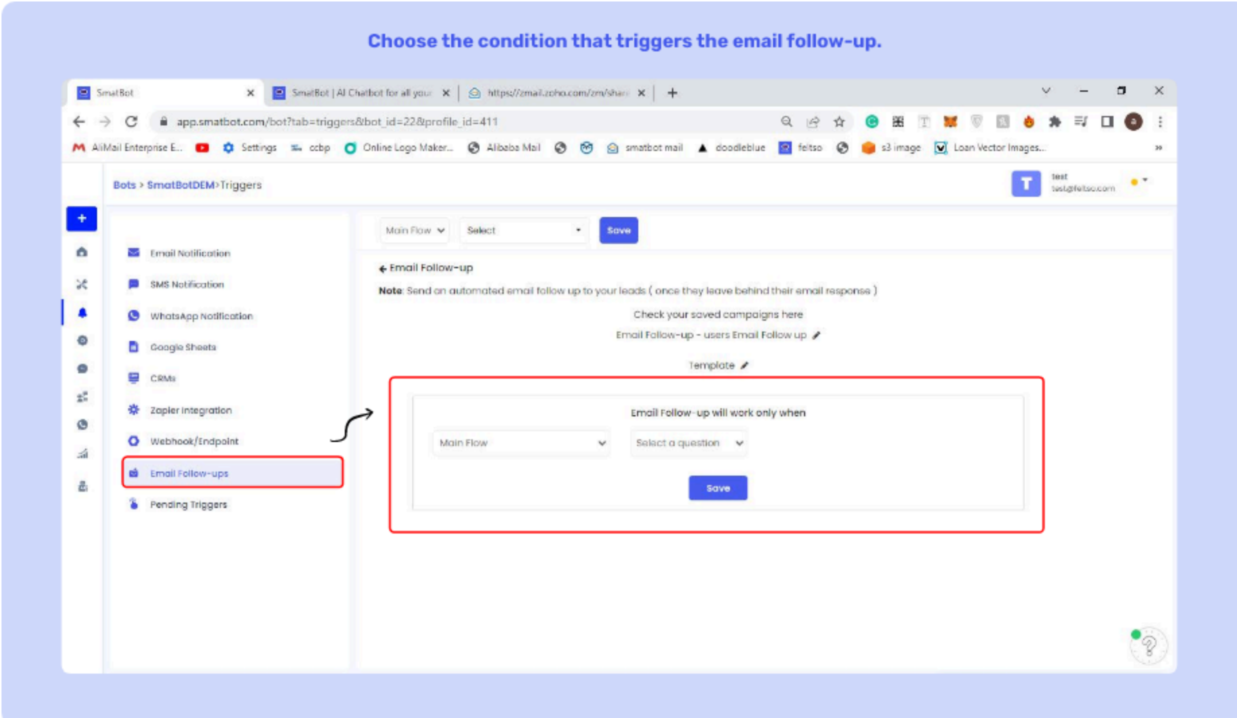
Note: You can use data from the bot's responses to embed into the email.



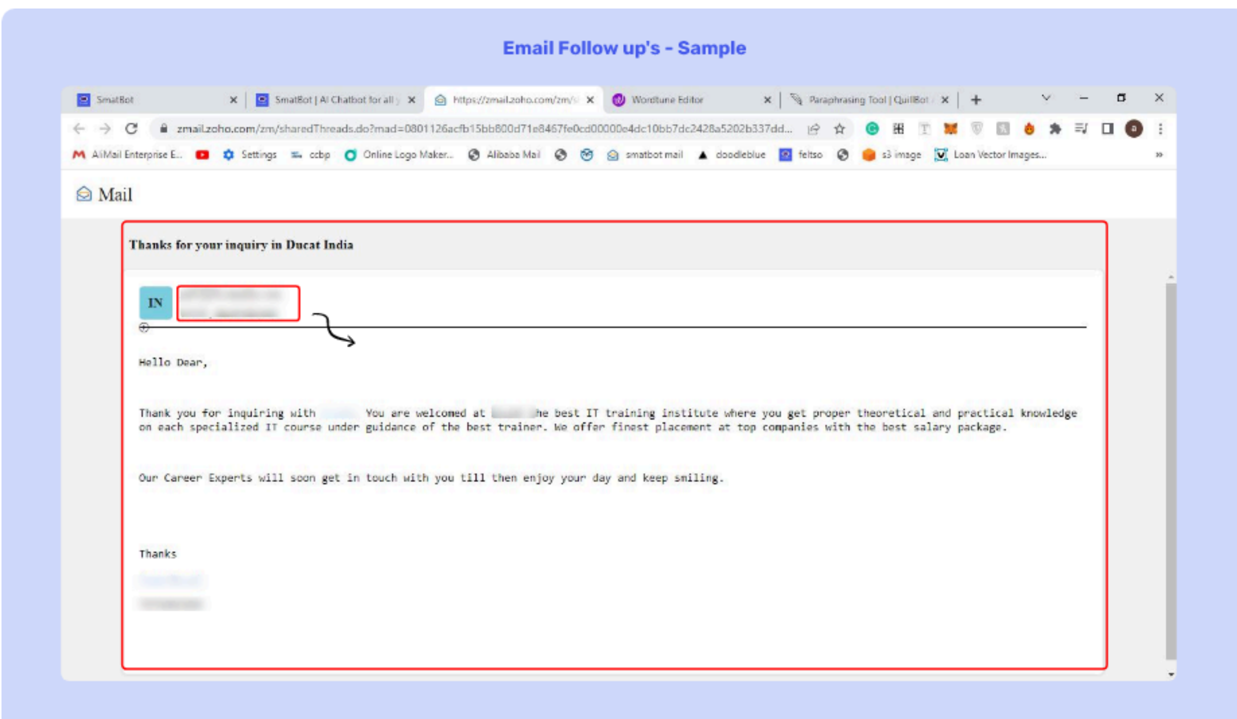
Step 7 :

Select the condition that will trigger the Email Follow-Up.

Note: Leave this blank if you don't have any such conditions.



Congrats, you have successfully setup Email follow-ups.



Multilingual Bots

- Add video

Make your bot multilingual to provide the best user experience wherever you are. To begin, follow the steps below or watch the video above.

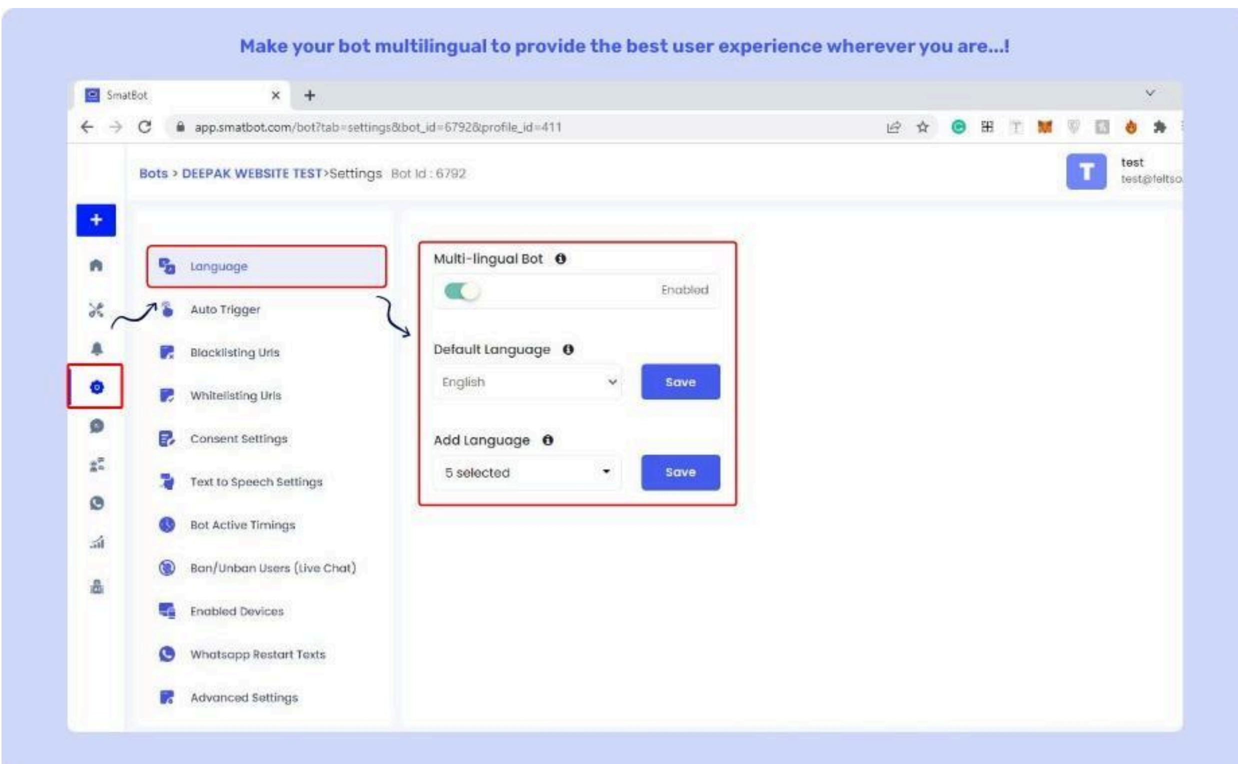
Step 1:

Login into SmatBot & navigate to your bot.

Step 2:

Go to **Settings** and navigate to the **Language** section.

***add image**



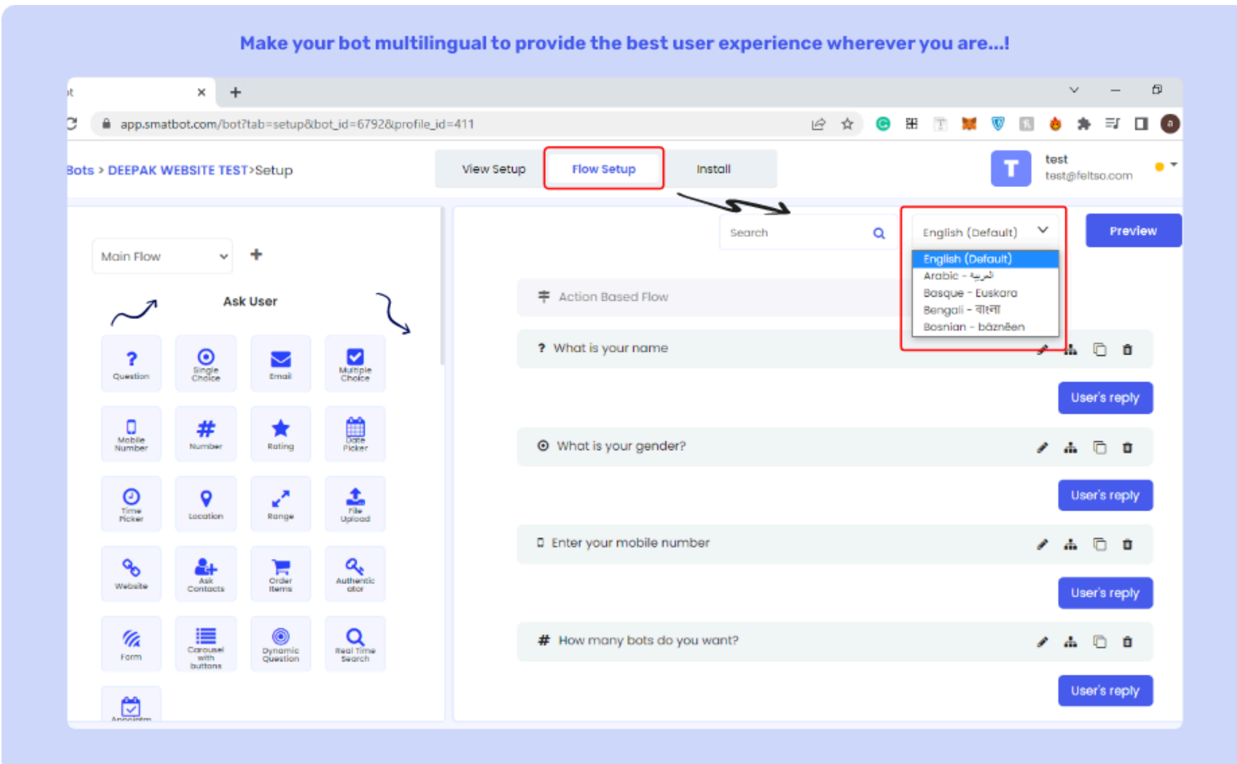
Step 3:

Select your default language from the drop-down menu. Then, from the drop-down below, select the other languages you want to add to your bot.

Step 4:

Next, create a chatbot by following this guide.

***add image**



Step 5:

Once you are done setting up the bot in your default language, navigate to the second language flow and edit the flow.

Great! You are done making your bot multi-lingual.

Supported Languages. If you don't see the language of your choice here, please contact us at support@smatbot.com and we will custom develop the language capability for you.

Language	Language Code
Arabic	ar
Basque	eu
Bengali	bn
Bosnian	bs
Brazilian	pt-BR
Bulgarian	bg
Catalan	ca
Croatian	hr
Czech	cs
Danish	da
Dutch	nl
English	en

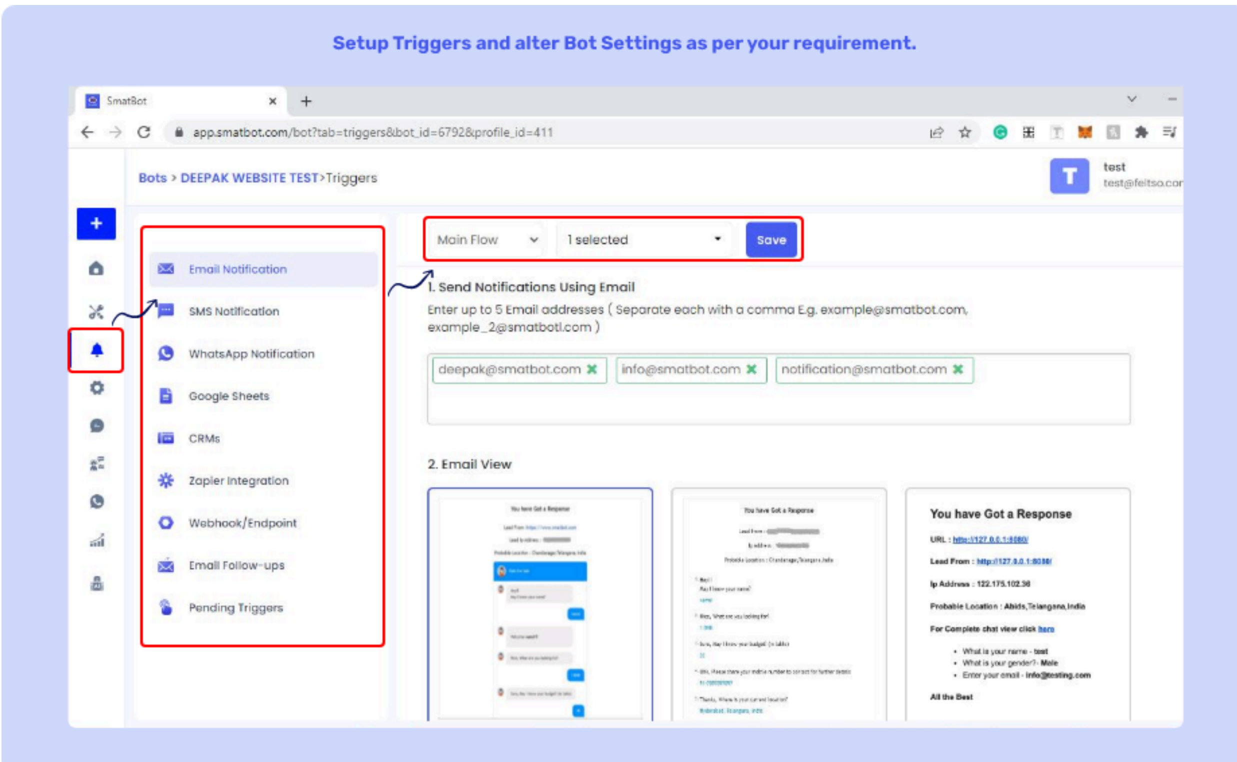
Estonian	et
Finnish	fi
French	fr
German	de
Greek	el
Gujarati	gu
Hebrew	he
Hindi	hi
Hungarian	hu
Indonesian	id
Irish	ga
Italian	it
Japanese	ja-Hani

Kannada	kn
Korean	ko
Latvian	lv
Lithuanian	lt
Malayalam	ml
Maltese	mt
Marathi	mr
Mongolian	mn
Norwegian	no
Polish	pl
Portuguese	pt
Punjabi	pa
Romanian	ro

Russian	ru
Serbian	sr
Simplified Chinese	zh-Hans
Slovene	sl
Spanish	es
Swedish	sv
Tamil	ta
Telugu	te
Thai	th
Traditional Chinese	zh-Hant
Turkish	tr
Ukrainian	uk
Urdu	ur

Vietnamese	vi

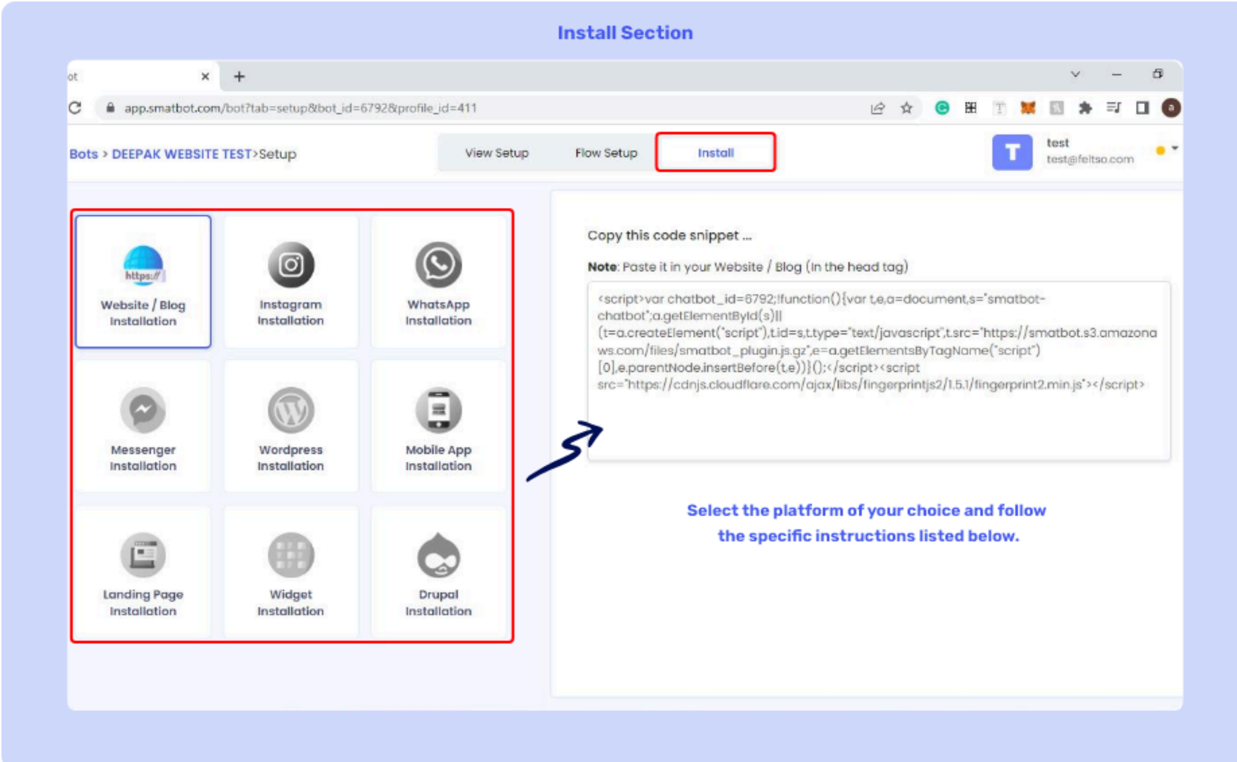
- x



Step 6

Installation.

- Video for website installation here



1. Click on the '**Install**' section.
2. Select the platform of your choice and follow the specific instructions listed below.
    a. Website/Blog
        i. Whitelist your URLs i.e. type in your URL addresses where you want the bot to be active (E.g. https://www.smatbot.com)
        ii. Copy and paste the code in the 'Header tag' of your website.
            * post image here
    b. Instagram - guide here.
    c. WhatsApp - guide here.
    d. Messenger - guide here.
    e. WordPress
        i. Copy and paste the code in the 'Header tag' of your blog.
    f. Mobile App - Please contact us for details.
    g. Landing Page
        i. Navigate to the link (Nothing else is required)
    h. Wordpress - guide here.
    i. Drupal - guide here.

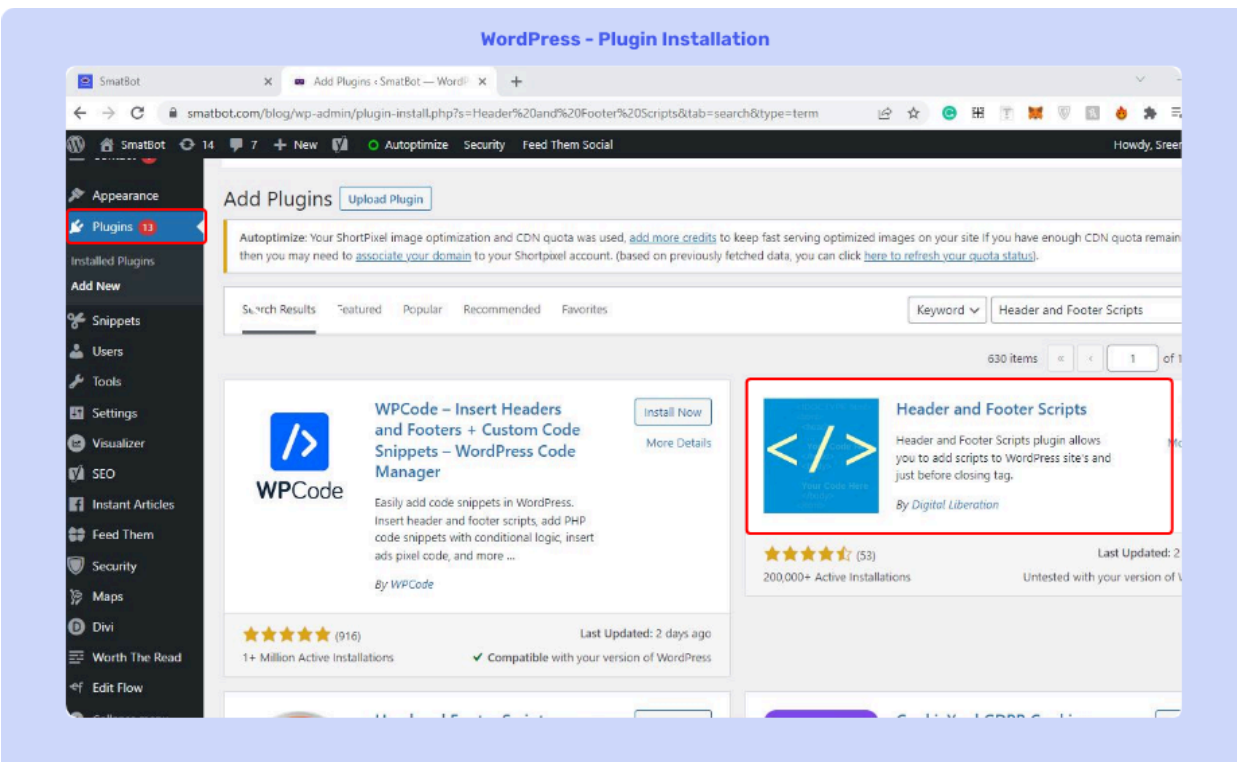
Install - Wordpress

- Add image

To install SmatBot on your WordPress hosted website, you will need to install a plugin first.

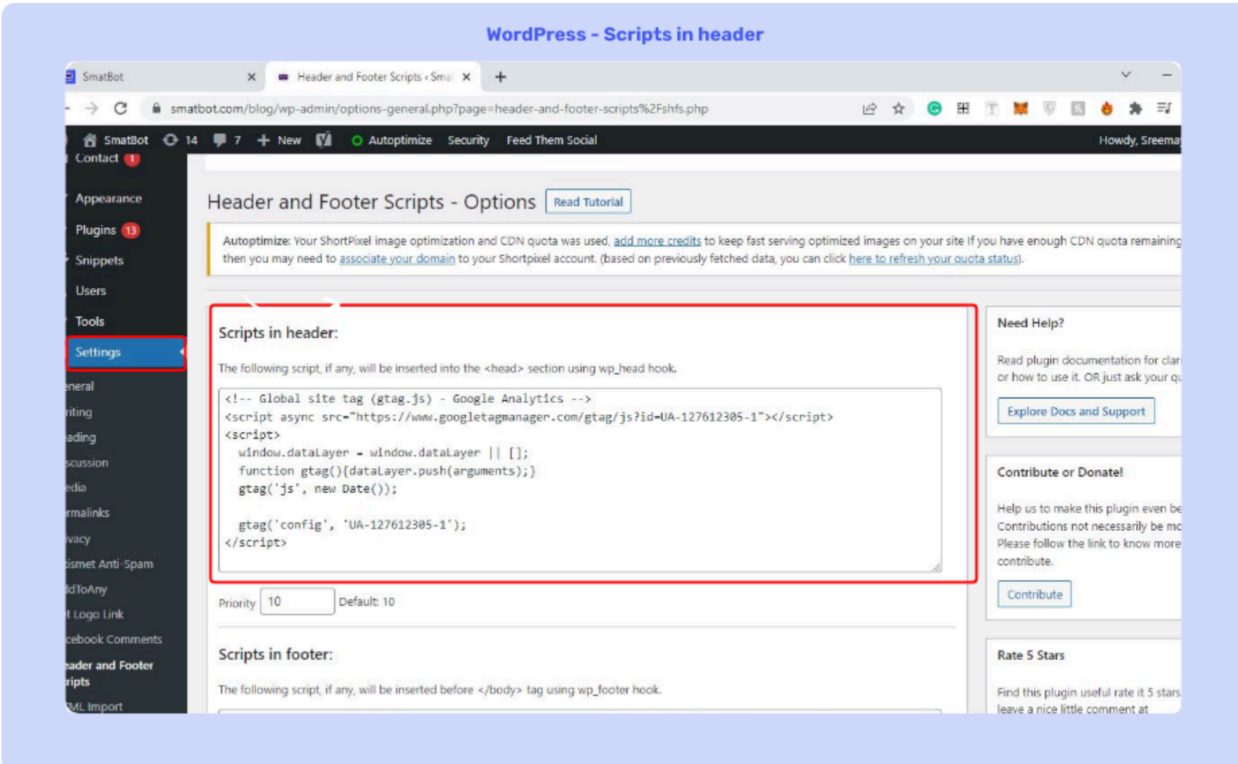
Installing Plugin:

1. Log in to your WordPress account.
2. Go to ‘Plugins’ > ‘**Add new**’.
3. Search for’ **Header and Footer Scripts’**.
4. Click ‘**Install Now’** and activate the plugin.



Installing SmatBot:

1. After the Plugin is installed, go to **Settings > Header and Footer Scripts.**
2. Next, in the **Scripts in header** section, copy the SmatBot installation code.
3. Click on '**Save Settings'**.



SmatBot installation on your WordPress website is now complete. Great job!

Install - Drupal

- Add image

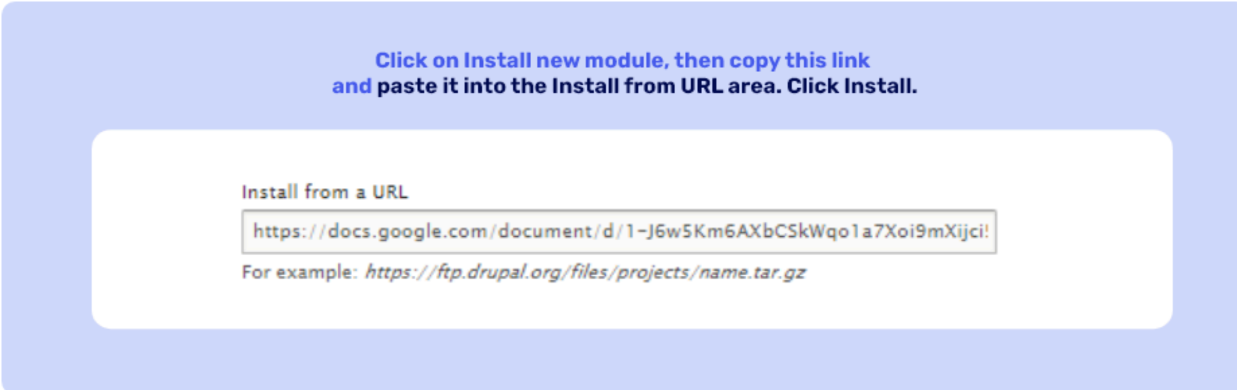
Step 1:

Go to the **admin dashboard** and click on the **Extend** section in the header.

Step 2:

Click on **Install new module** and copy this link and paste it in the **Install from URL** section. Next, click on **Install.**

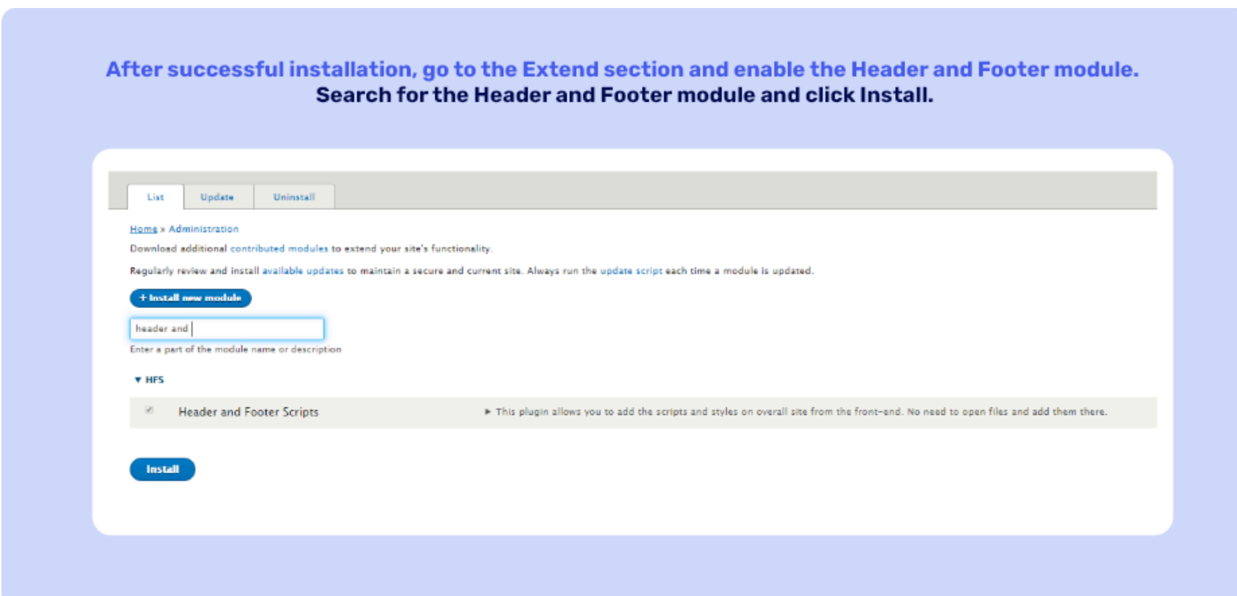
- Add image



Step 3:

After successful installation, enable the Header and Footer module by navigating to the ‘Extend’ section, searching for the “Header and Footer” module and clicking on Install.

- Add image

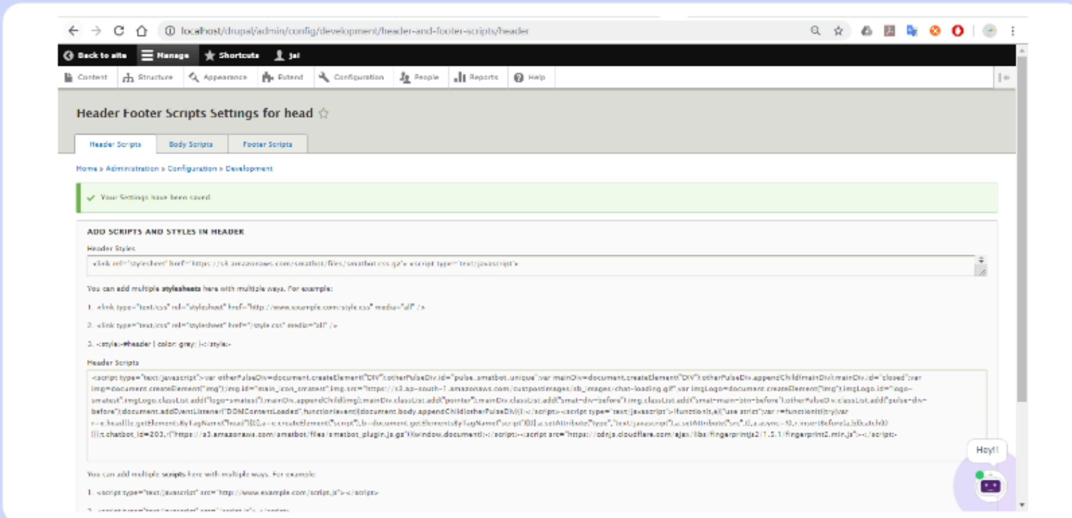


Step 4:

Navigate to the admin/config/development/header-and-footer-scripts/header path, and you will see a page that looks like this.

- Add image

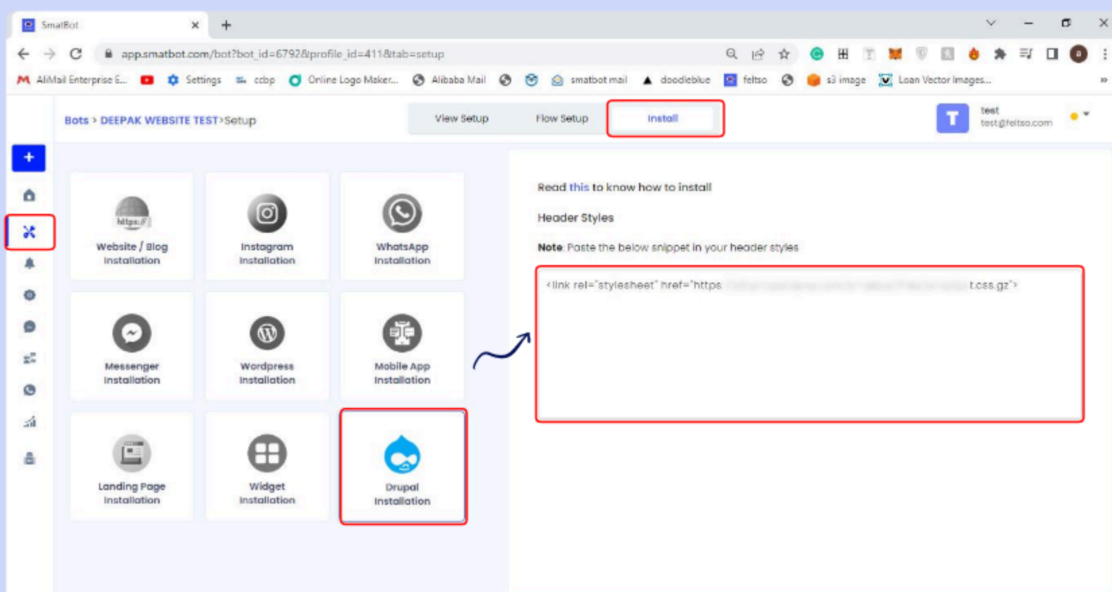
Navigate to the admin/config/development/header-and-footer-scripts/header path and you will see a page like this.



Please copy the Header Styles and Header Scripts from SmatBot Dashboard -> Install -> **Drupal Installation** and paste it. Click on **Save Configuration.**

- Add image

Please copy Header Styles and Header Scripts from SmatBot Dashboard -> Install -> Drupal Installation and paste it here and click Save Configuration.

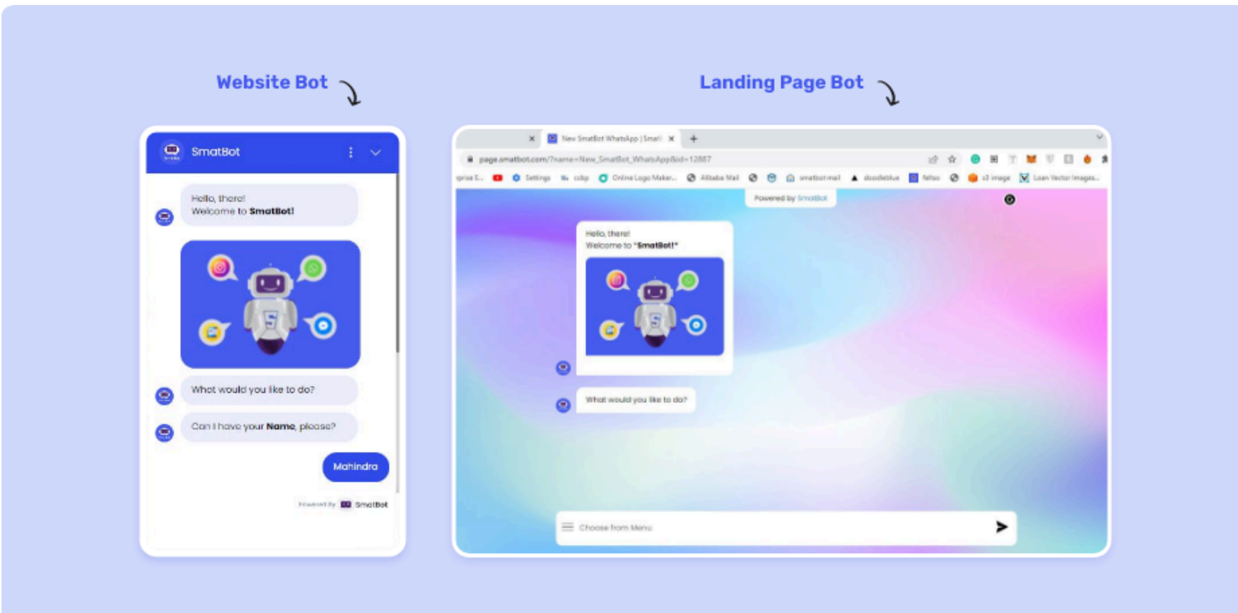


Your installation is complete. SmatBot is now live on your website.

Chats and Messages

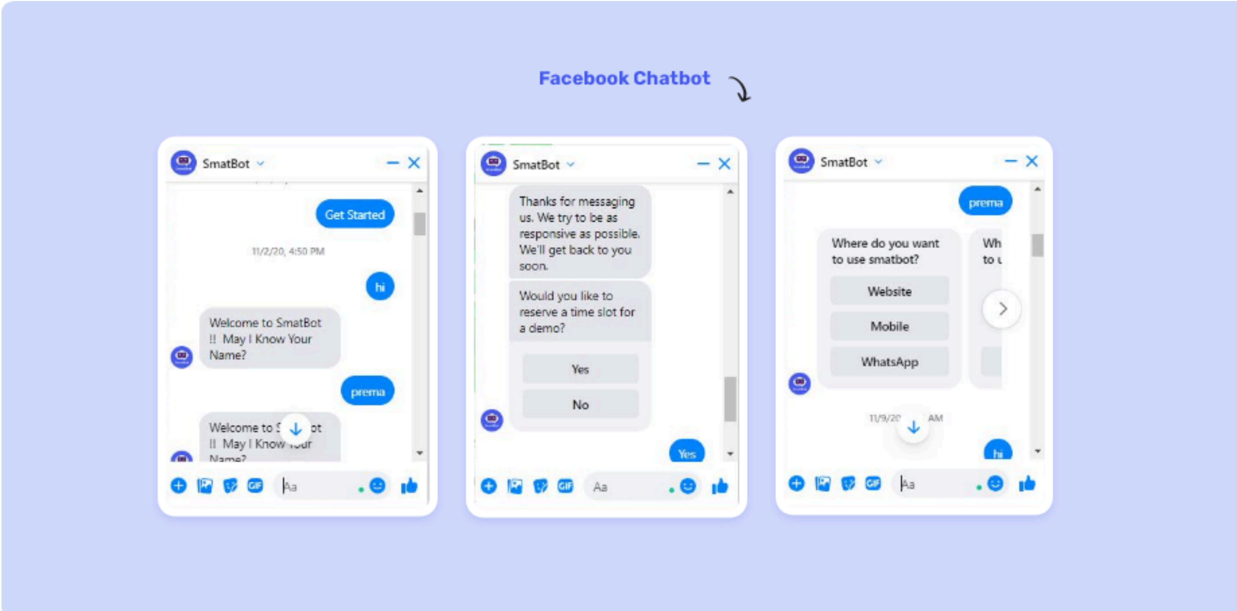
- Add image

1. Website/Landing page Chatbots



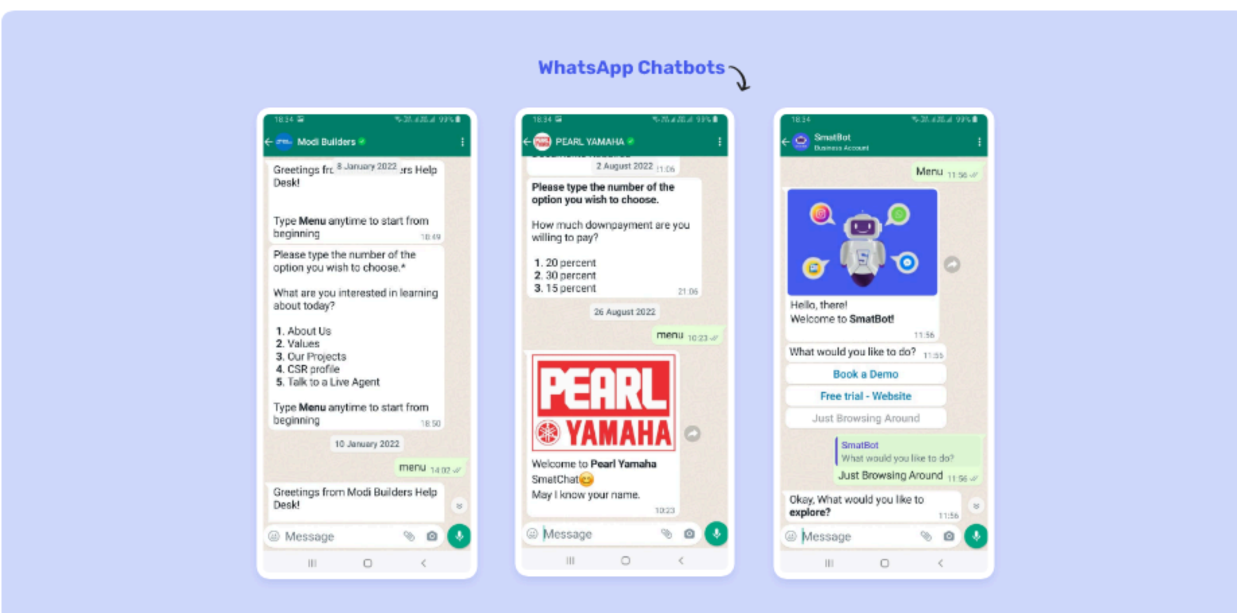
- A visitor's first interaction with the bot is counted as one chat.
- When the same visitor revisits the bot, the bot provides the option to either 'Continue' or 'Start a New Conversation'.
- When a visitor selects 'Continue' the interaction is not counted again. If the visitor selects 'Start Again', the bot is refreshed and this interaction is counted as a new chat.

2. Messenger Chatbots



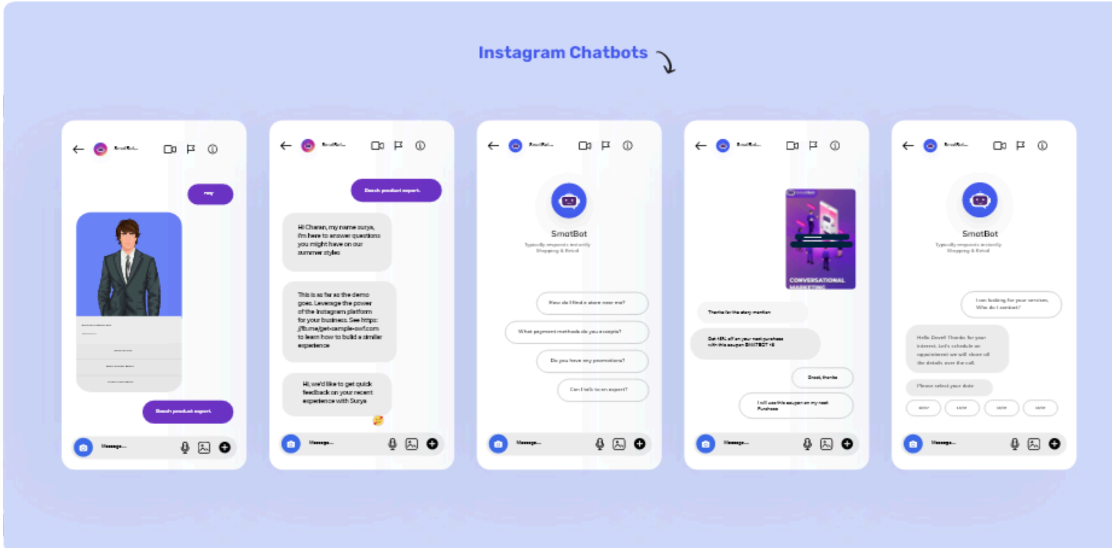
- A visitor's first interaction with the bot is counted as one chat.
- If the same visitor visits the bot without closing the initial chat, this interaction is counted as the same chat.
- If the same visitor deletes the conversation and revisits the chat, this interaction is counted as a new chat.

3. Whatsapp Chatbots



- Please refer to a detailed guide on WhatsApp chats & billing [here](#).

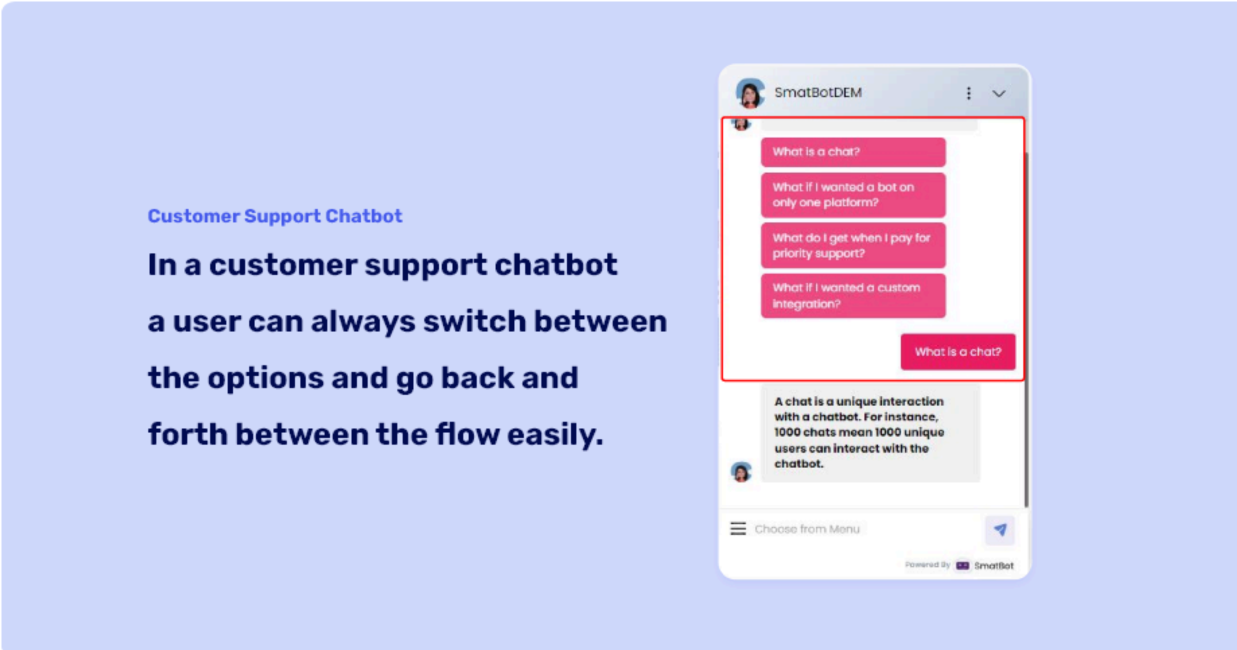
4. Instagram Chatbots



Lead Generation Vs Customer Support Bots

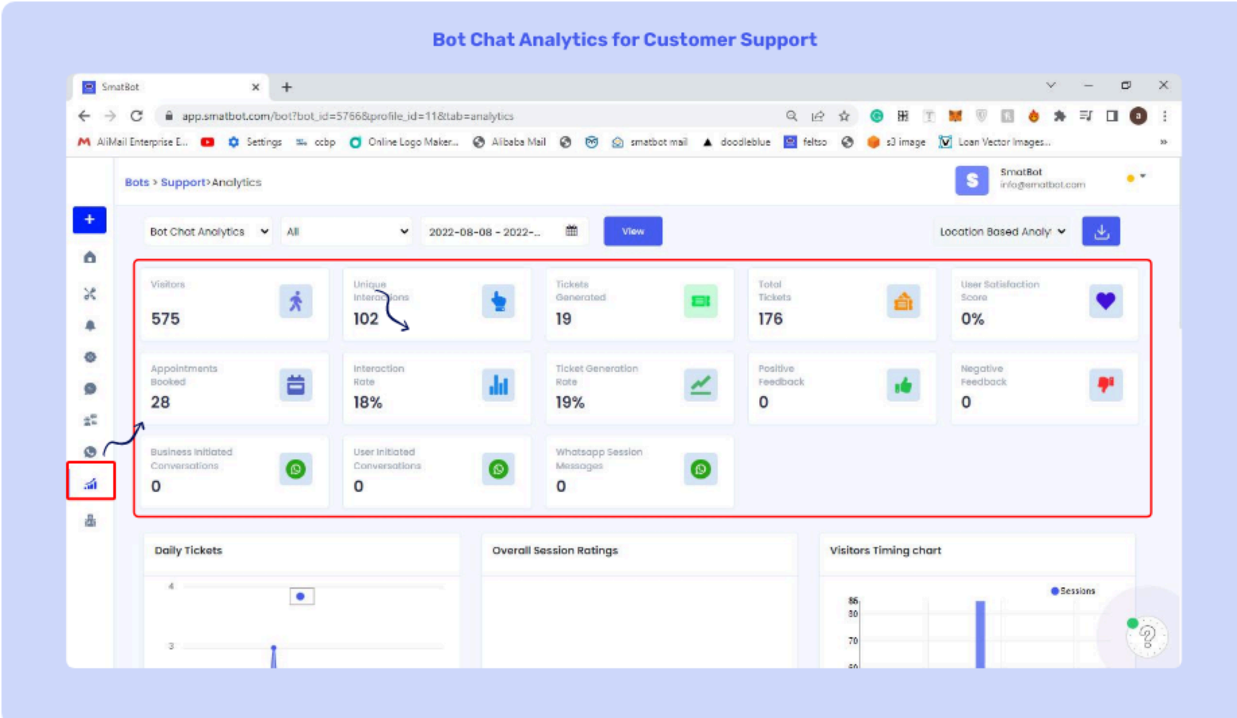
Navigation

1. We observed that users wanted to navigate between the questions when they are trying to solve queries using the customer support chatbot. You can see an example of this below .Difference: In our regular chatbot, a user will not be able to go back and choose a different set of queries. However, in a customer support chatbot a user can always switch between the options and go back and forth between the flow easily.



Analytics:

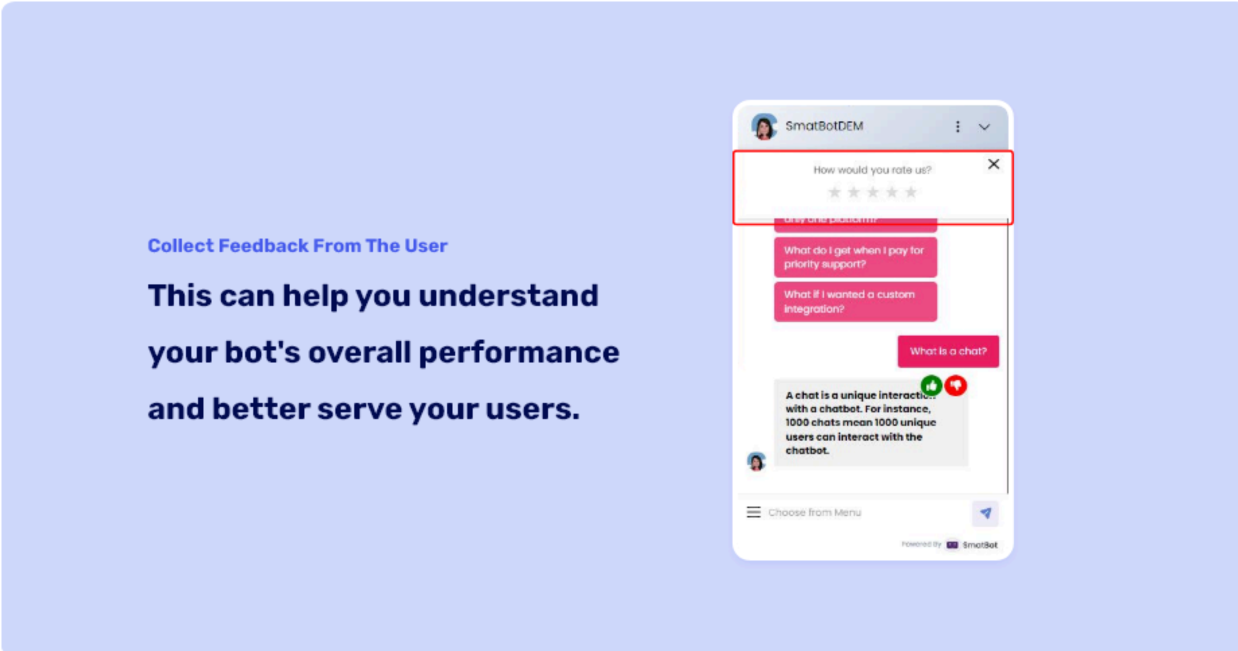
1. All the numbers and statistics needed to analyze every aspect of your customer support bot will be at your fingertips. Some examples include, answer level feedback, overall chat session feedback and number of support tickets created.Difference: Our regular chatbot shows analytics that are relevant to lead generation which are significantly different from those we offer in our customer support chatbot.



Apart from these two significant differences, we've also added some other features to make the customer support bot more effective.

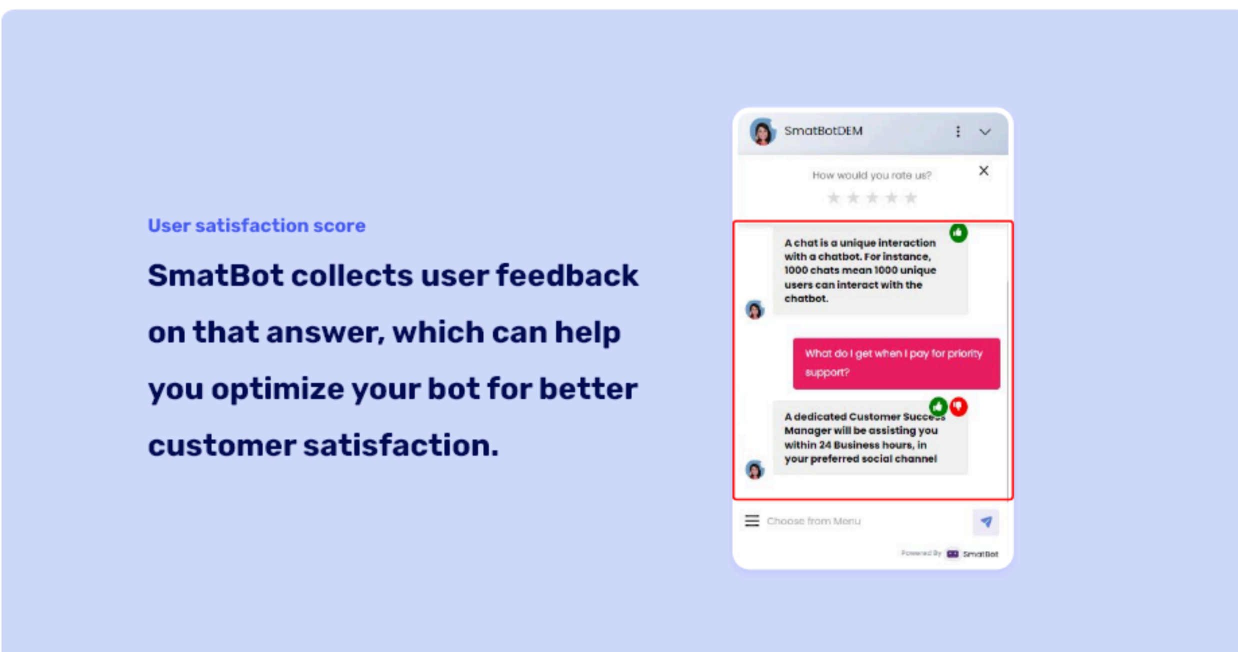
Feedback:

1. We will be asking your users for feedback when the bot answers users' first question by default. It can help you understand your bot's overall performance and help better serve your users.



User satisfaction scores for bot answers:

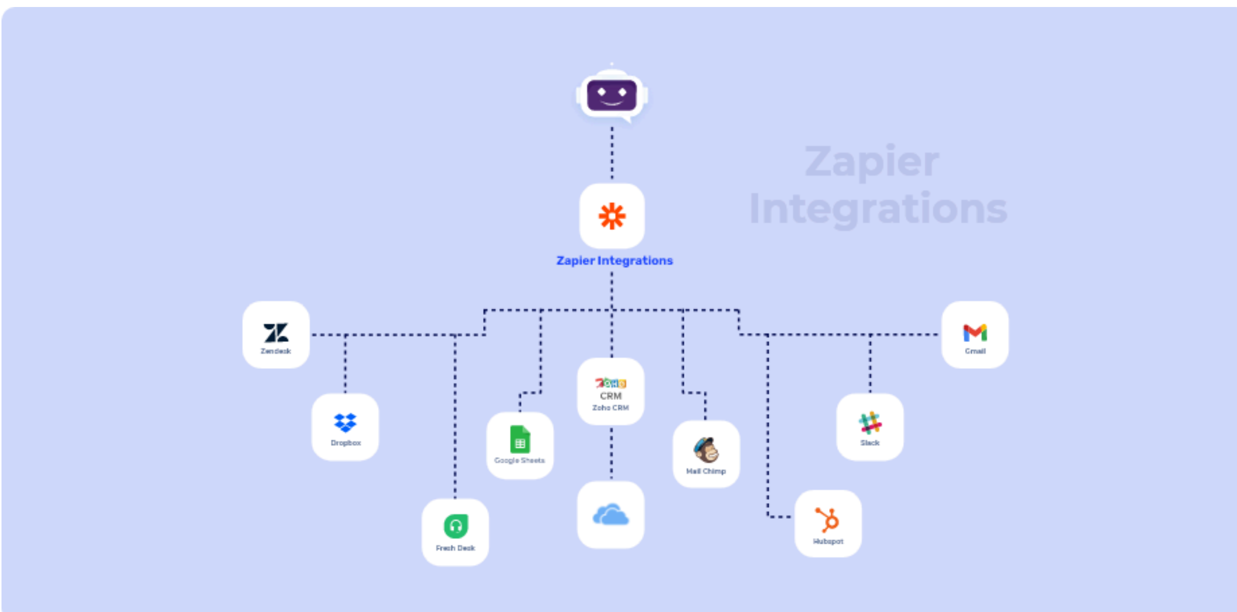
1. Every time the bot answers a question, SmatBot collects feedback from the user regarding that answer which can help you alter your bot for increased customer satisfaction.



3. Integrations (outer section)

Zapier Integration

- **Add video**



Step 1 :

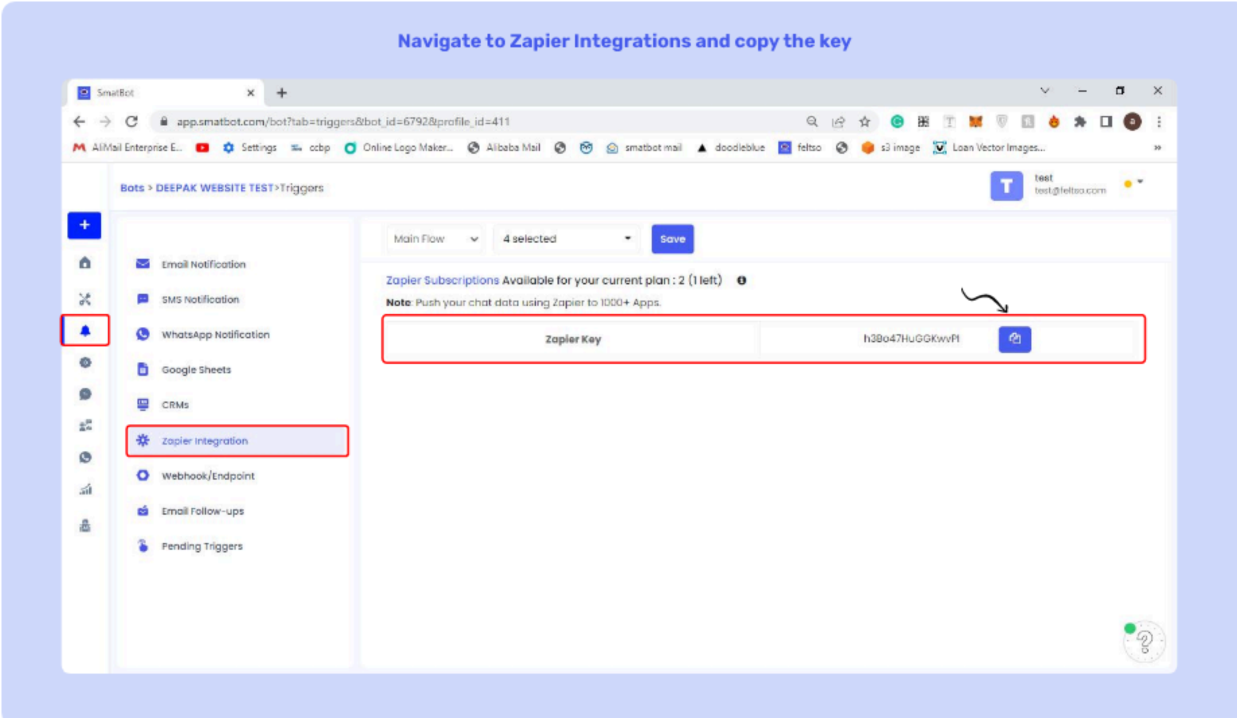
Login to your Smatbot Account.

From the dashboard, select the bot you wish to integrate with Zapier.

Select **Triggers** from the left side panel.

Step 2 :

Choose **Zapier Integration** and Copy the **Zapier Key.**



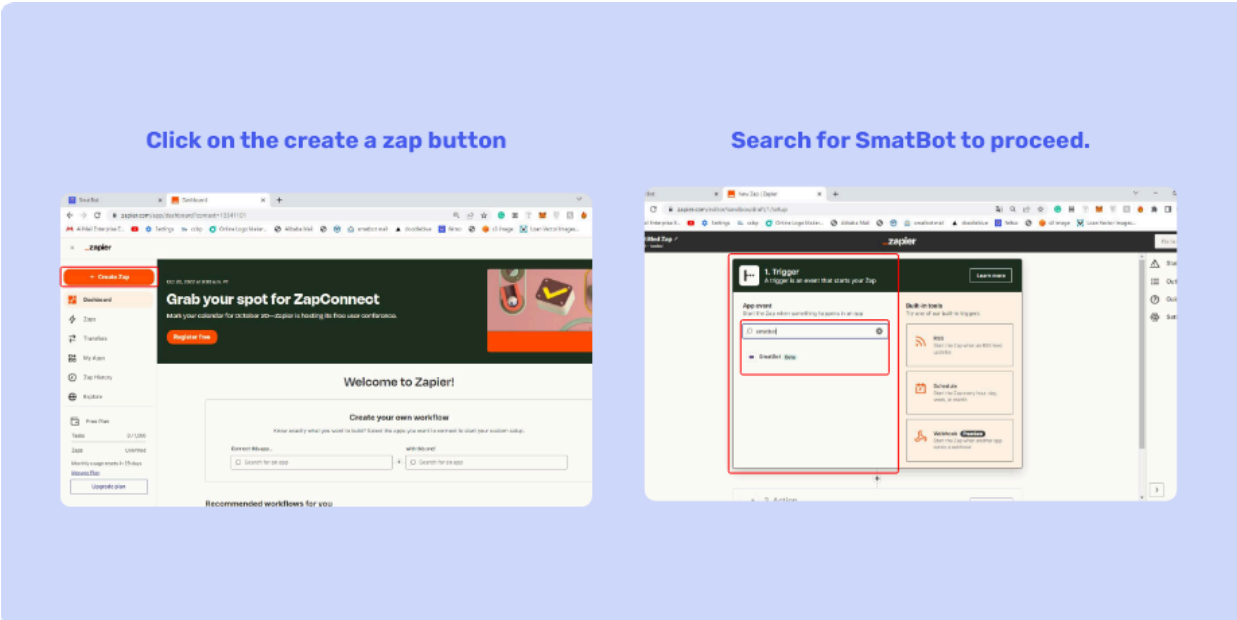
Step 3:

Now, [login](#) to your Zapier account and proceed by opening this [link.](#)

Your Zapier Dashboard appears once you log in.

Step 4:

Click on **Create a Zap** and search for **SmatBot** to create a Trigger & proceed.



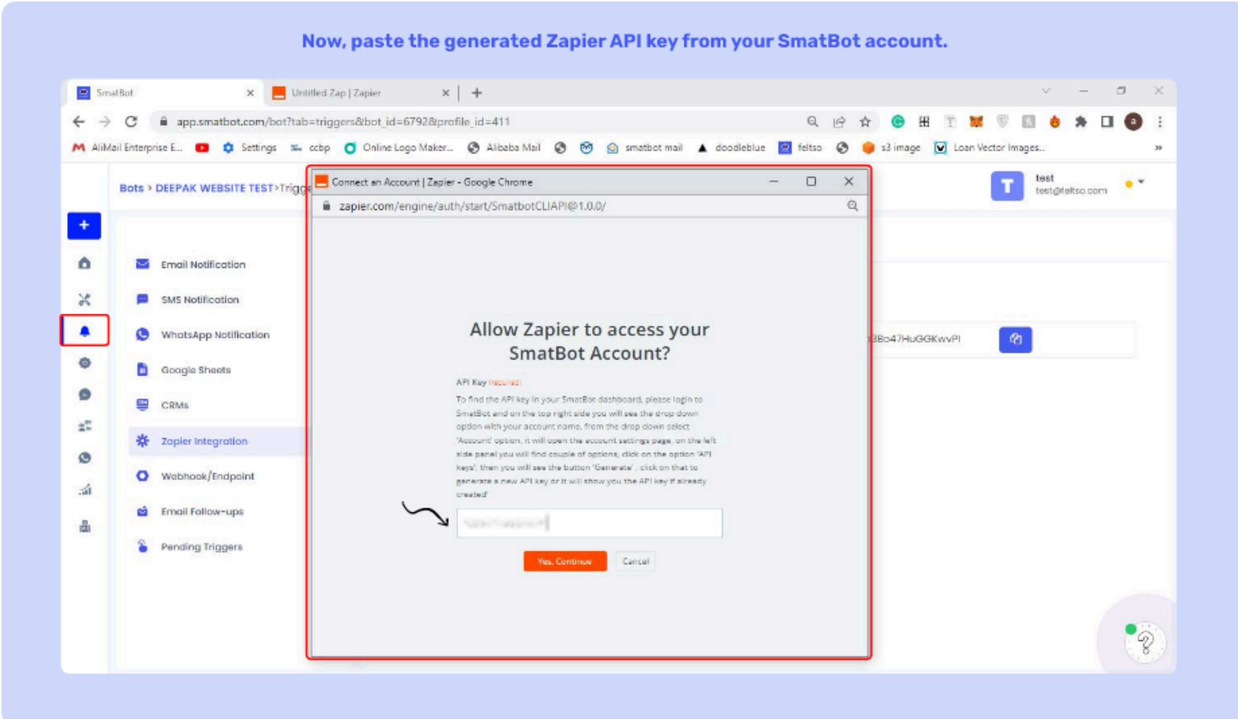
Step 5:’

Click on **New Lead** and then **continue.**

Proceed to connect your SmatBot Account.

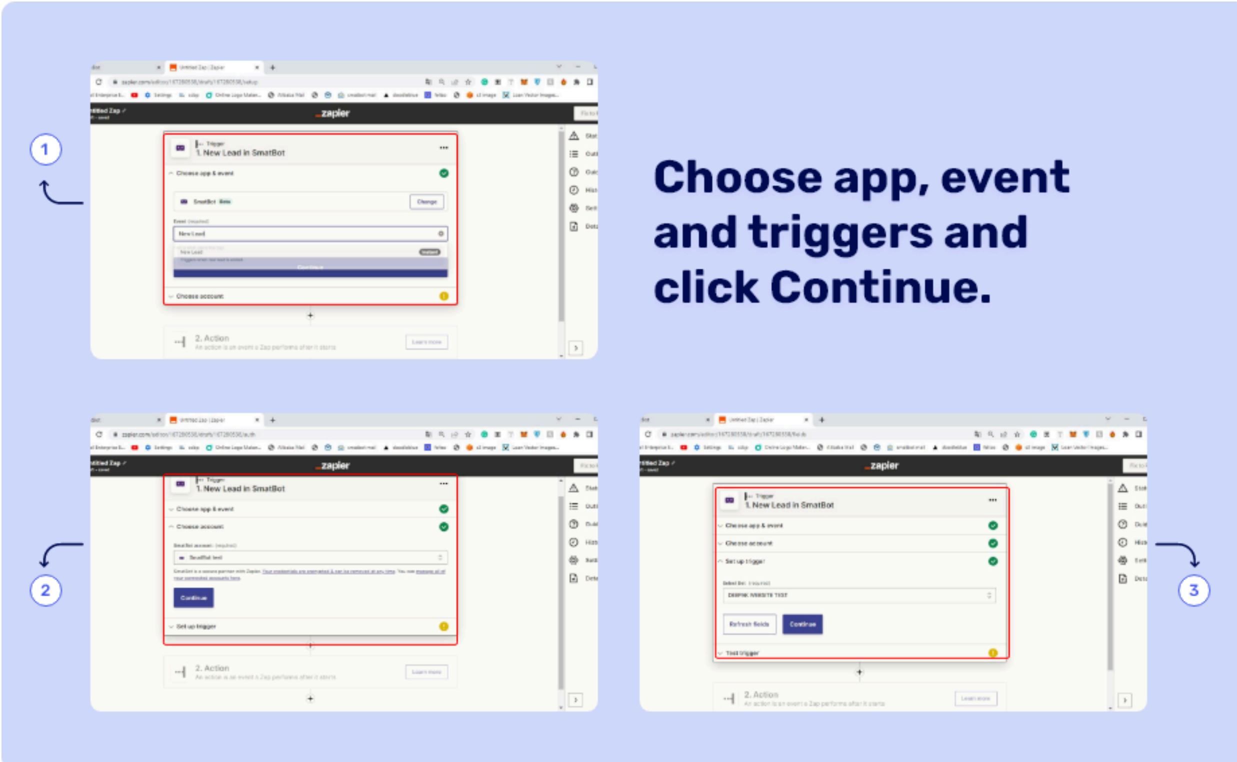
Step 6:

Enter the **Zapier key** you copied from your SmatBot account and click on **continue** to connect.

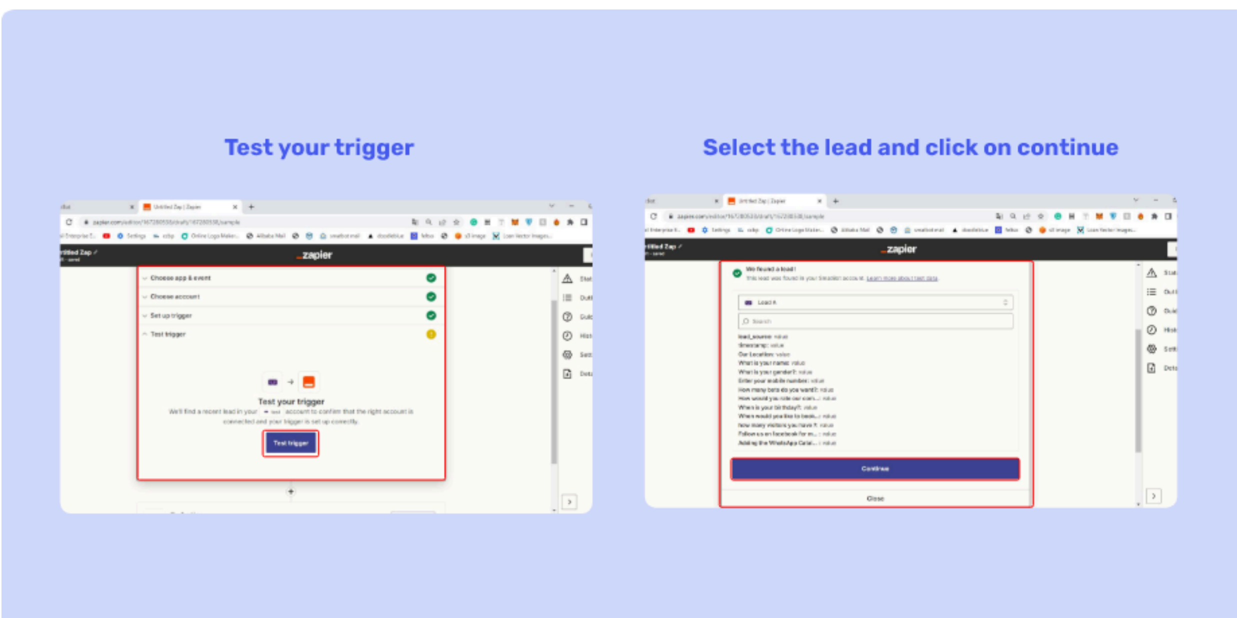


Step 7:

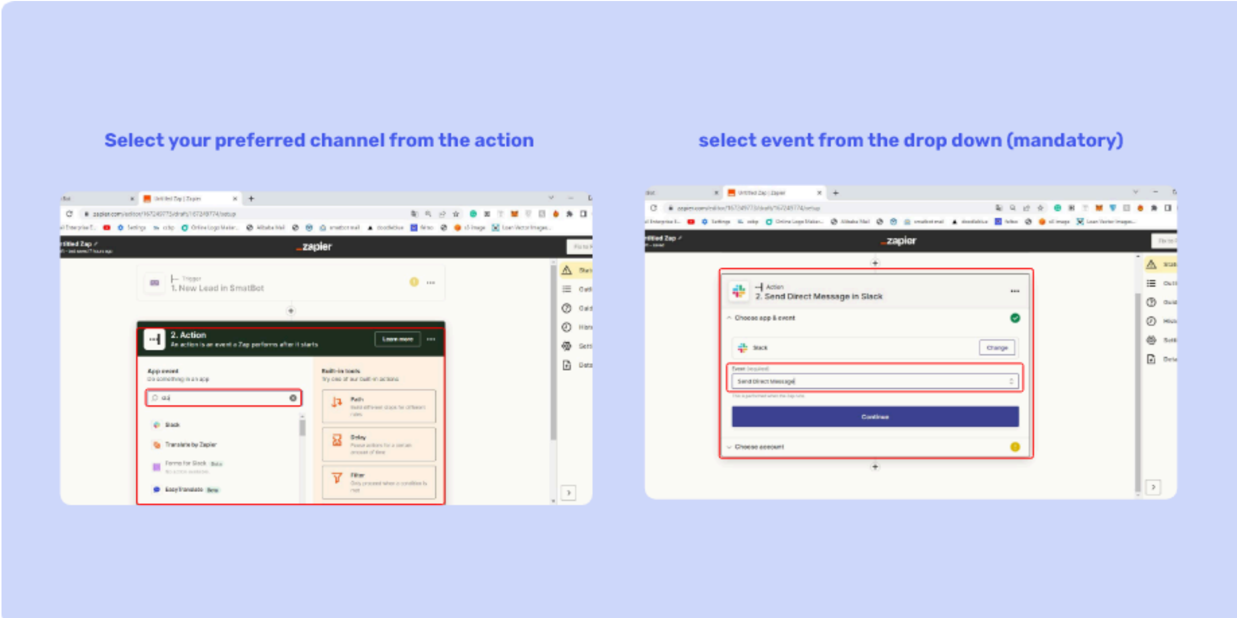
Select the bot you need to integrate Zapier with.



You can test the trigger.



Step 8:



Move on to the **Action** tab and set up the action you need.

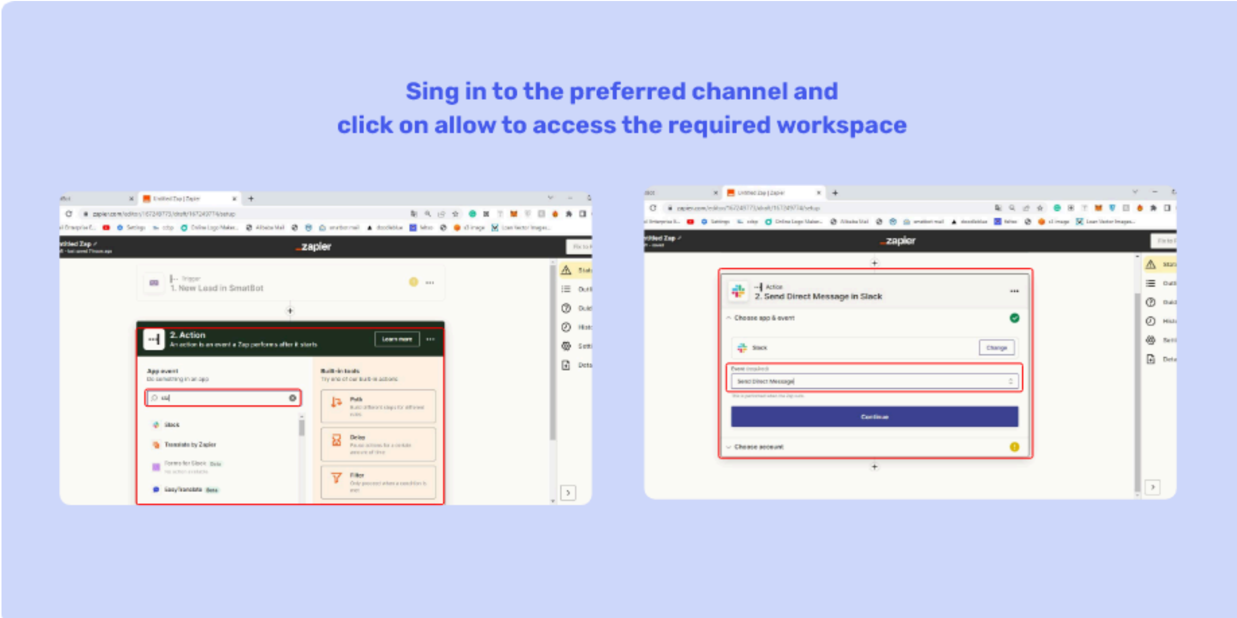
Choose the app you wish to connect and set up ‘App Action’ accordingly.

As an example, we’ve set up a slack direct message.

Step 9:

Now connect your Slack Account.

Enable all the settings.

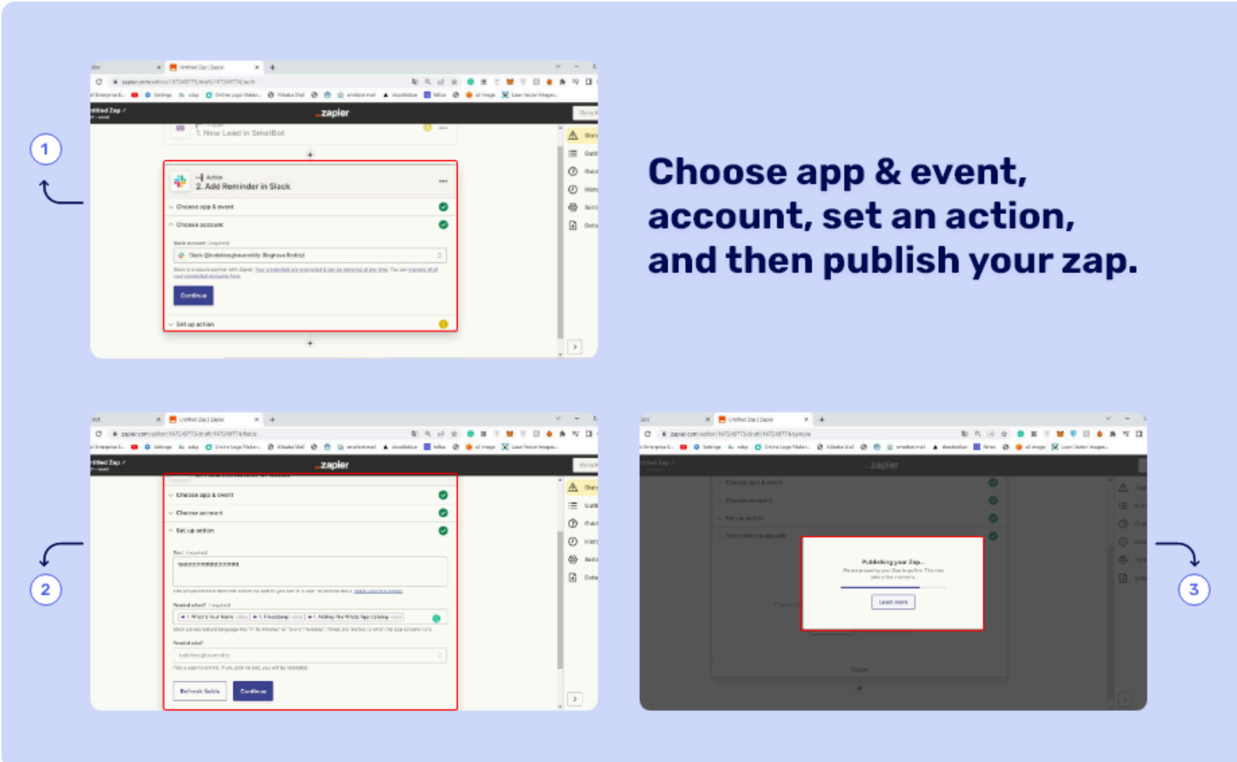


Step 10:

Provide the username and the message you want to send them.

Choose your bot name, icon, image URL's, and the time at which the message needs to be sent.

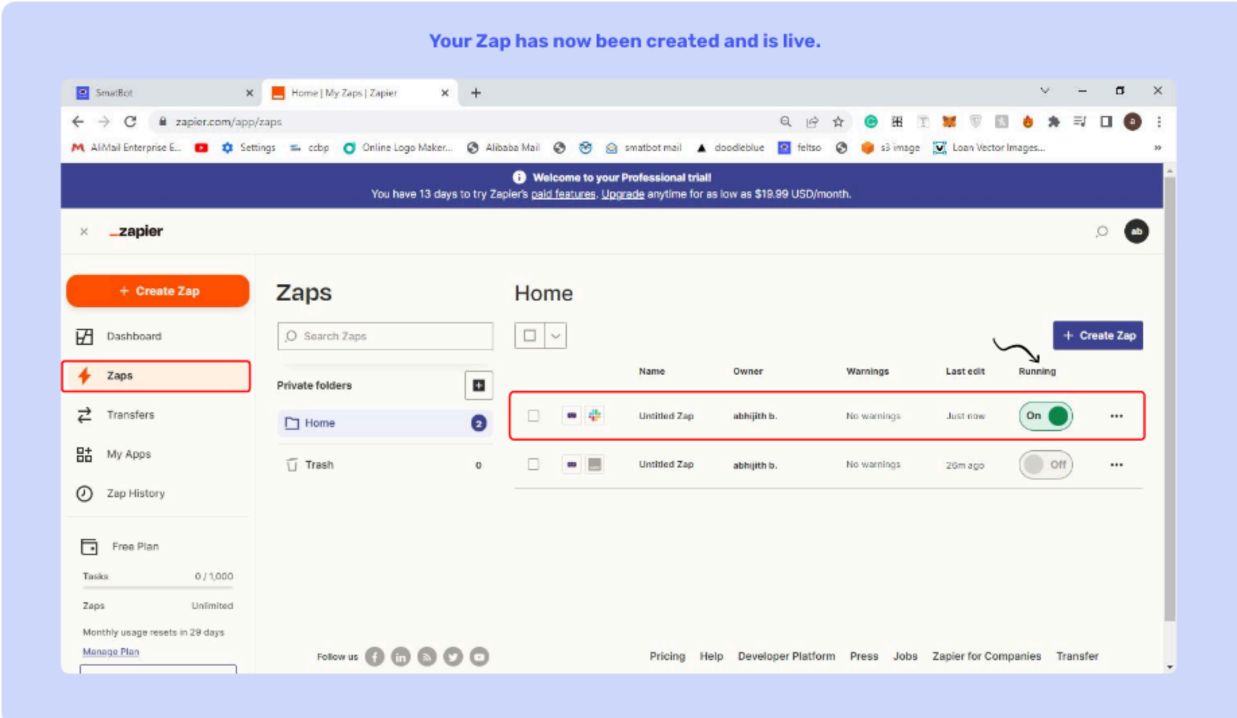
In your bot, you can select a question that triggers a zap when a visitor answers it.



Step 11:

You can test & publish the Zap.

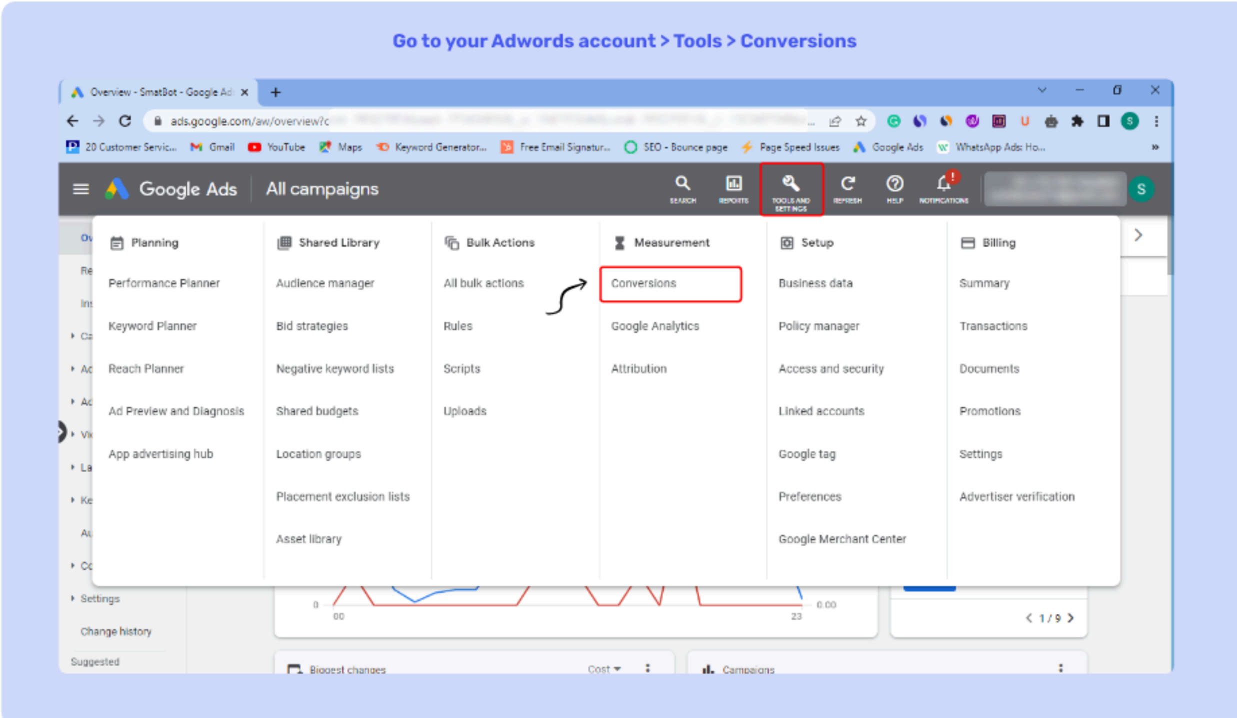
Your Zap is now created!



Adwords Integration

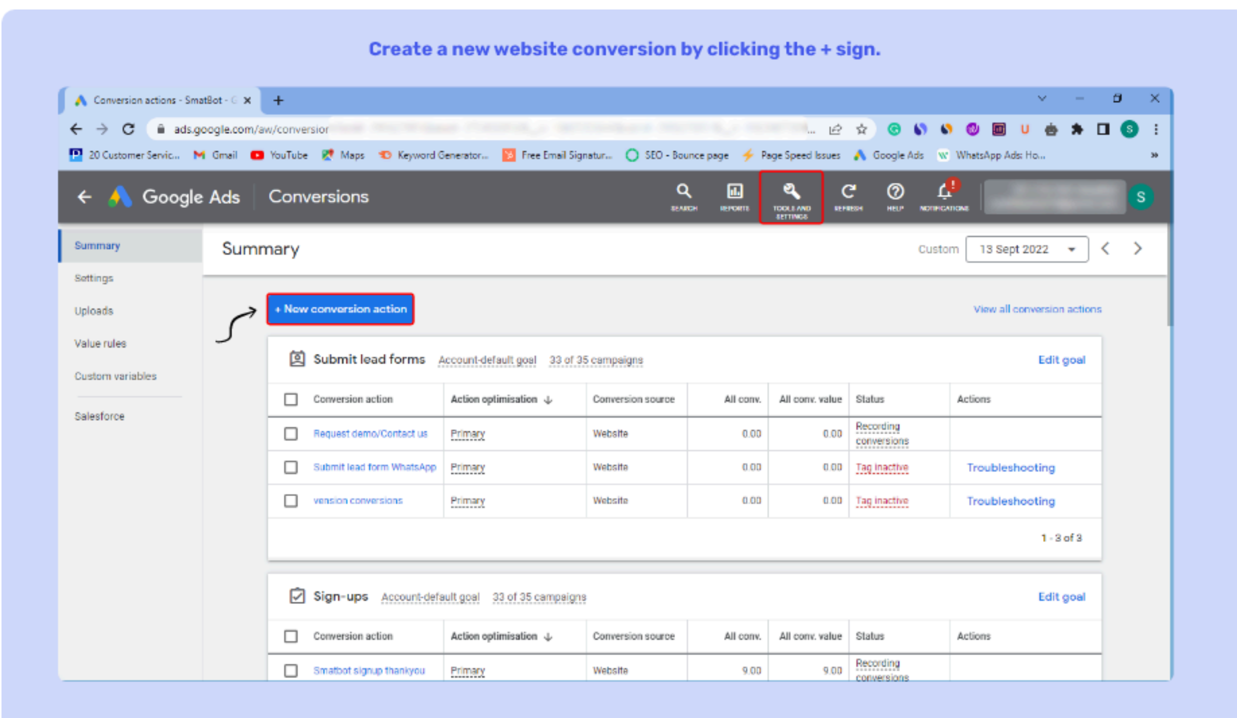
Step 1 :

Navigate to your [Adwords account](#) > Tools > Conversions.



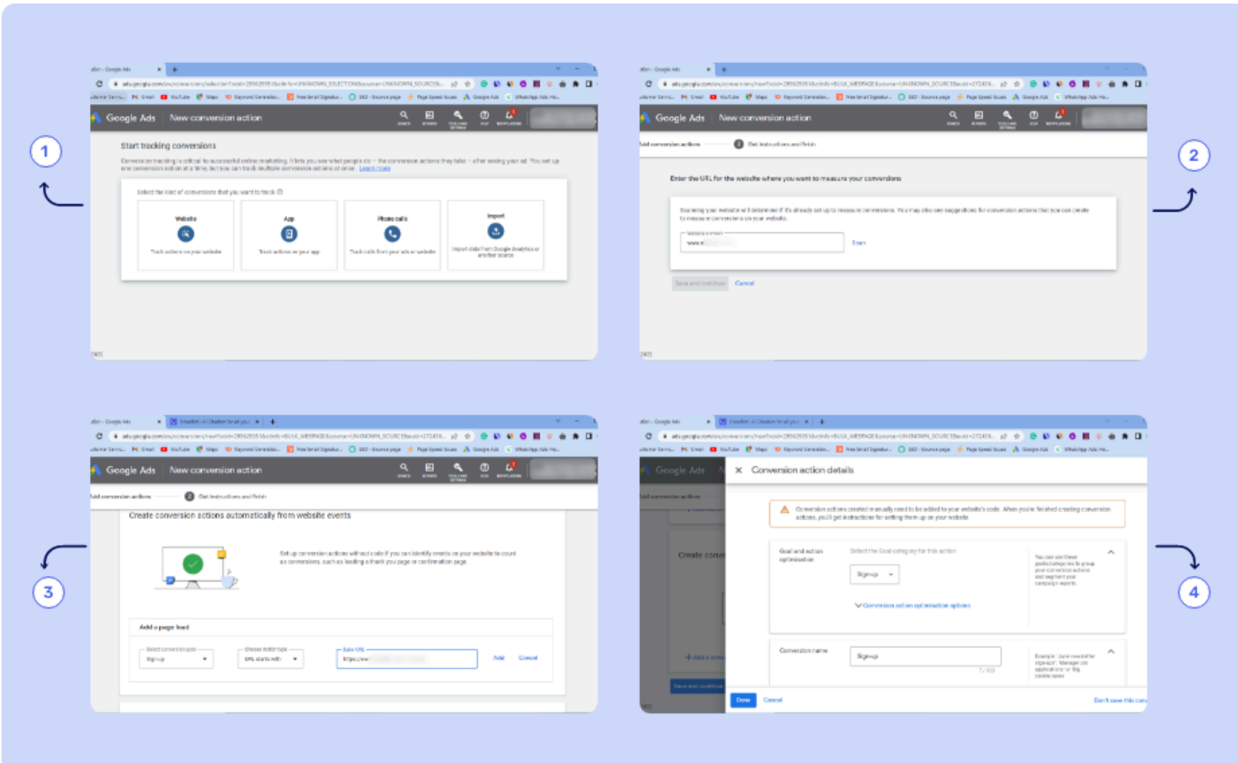
Step 2

Click on the '**+New Conversion Action**'.



Step 3

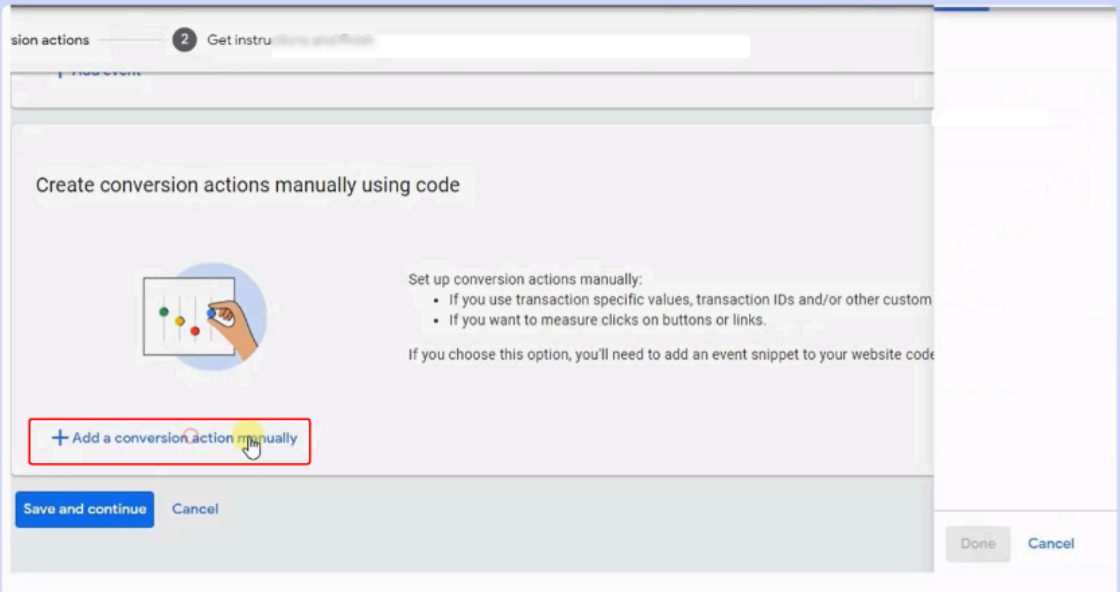
1. Click on **Website conversion.**
2. Enter the URL of the website to be measured.
3 Choose a category to set up a conversion goal. For example, select **Sign-up** and match type as **URL starts with** and enter the URL, and click on **Add.**
4. You can choose to add a conversion action manually.
5. Add the **Goal & Conversion Name** as Sign-up. You can choose the conversion's value. Select the count to see the number of conversions per click. Once updated, click **Save** and **Continue.**



Step 4

Select the framework that your website code uses. As an example, HTML was selected. You can also add the conversions manually.

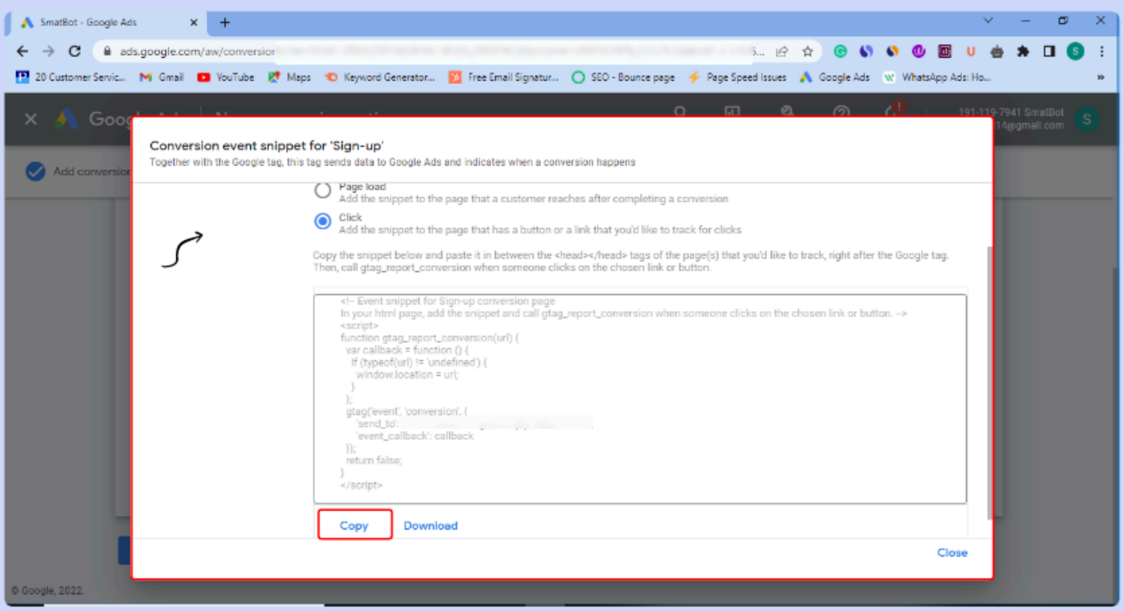
Click on Add A conversation action manually



Step 5

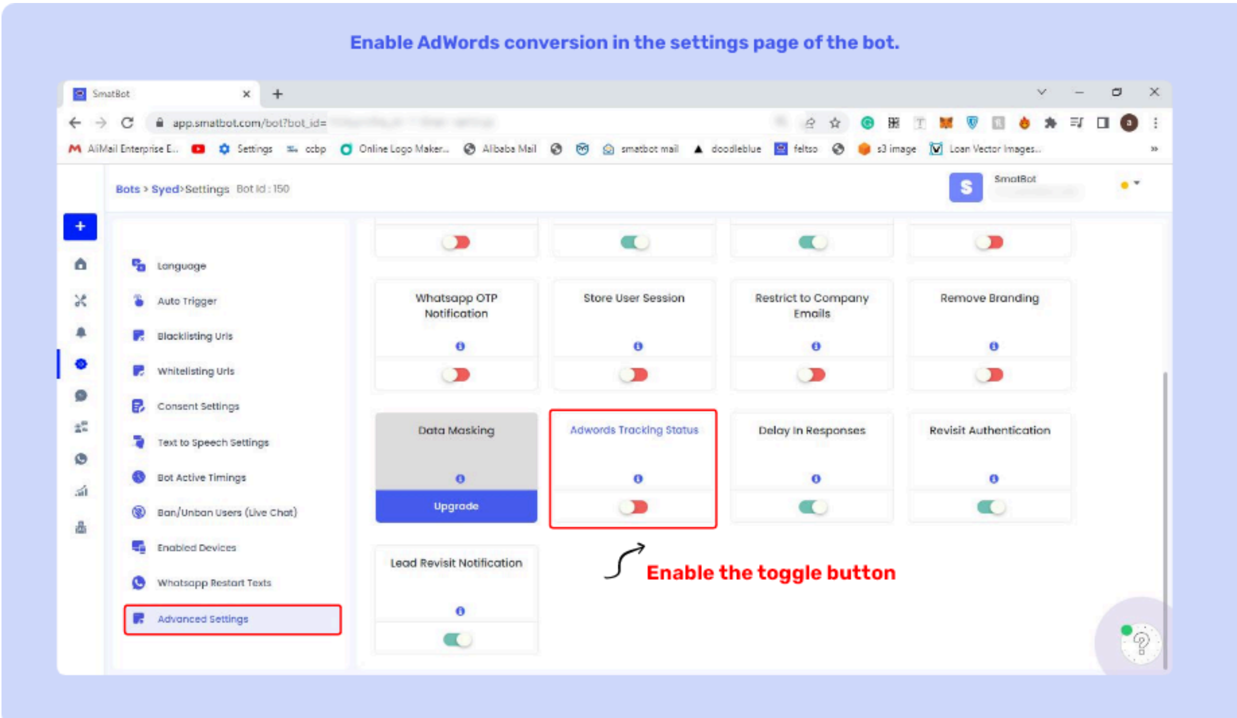
In the event snippet, select 'Click'. Copy the snippet code and paste it in the header section of your website.

select the click option in the event snippet, copy the code, and paste it in your website's head section.



Step 6

Go to the SmatBot dashboard and enable AdWords conversion in the settings page of the bot.



Note : Please note that AdWords Conversion Tracking only works for bots installed on your website and not on other platforms.

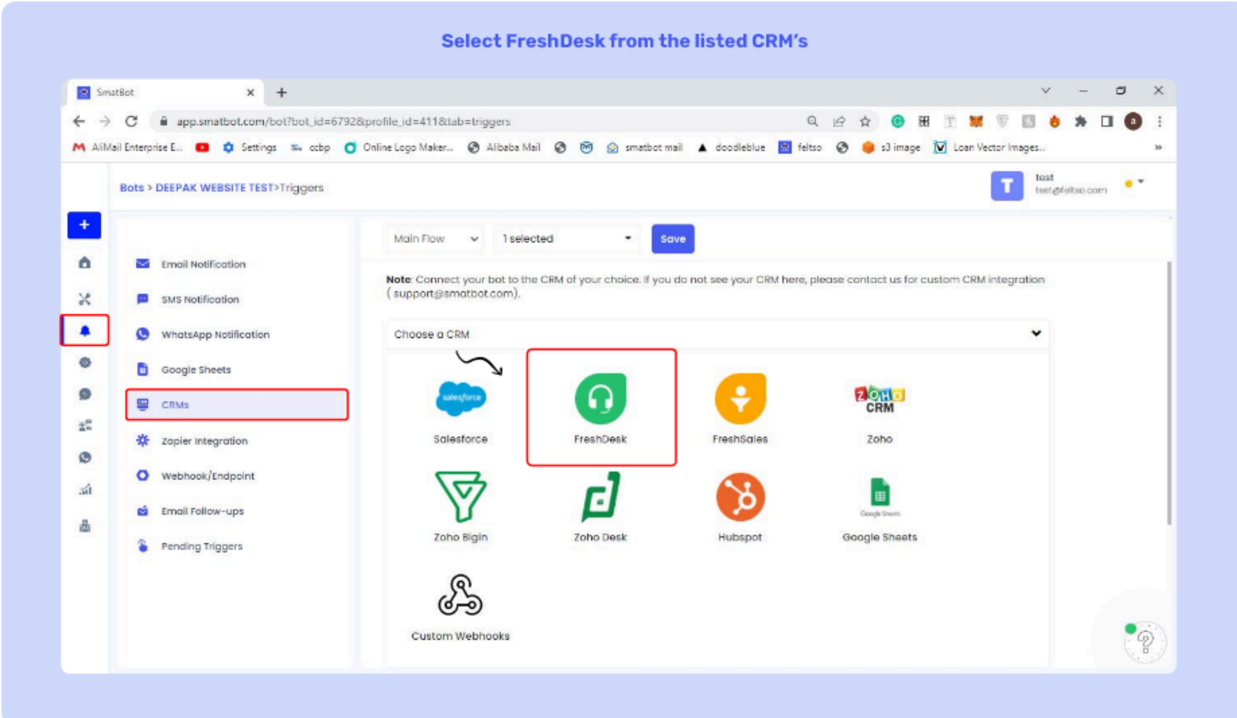
Freshdesk / Freshsales Integration

Step 1 :

[Login](#) into Smatbot and open your Bot.

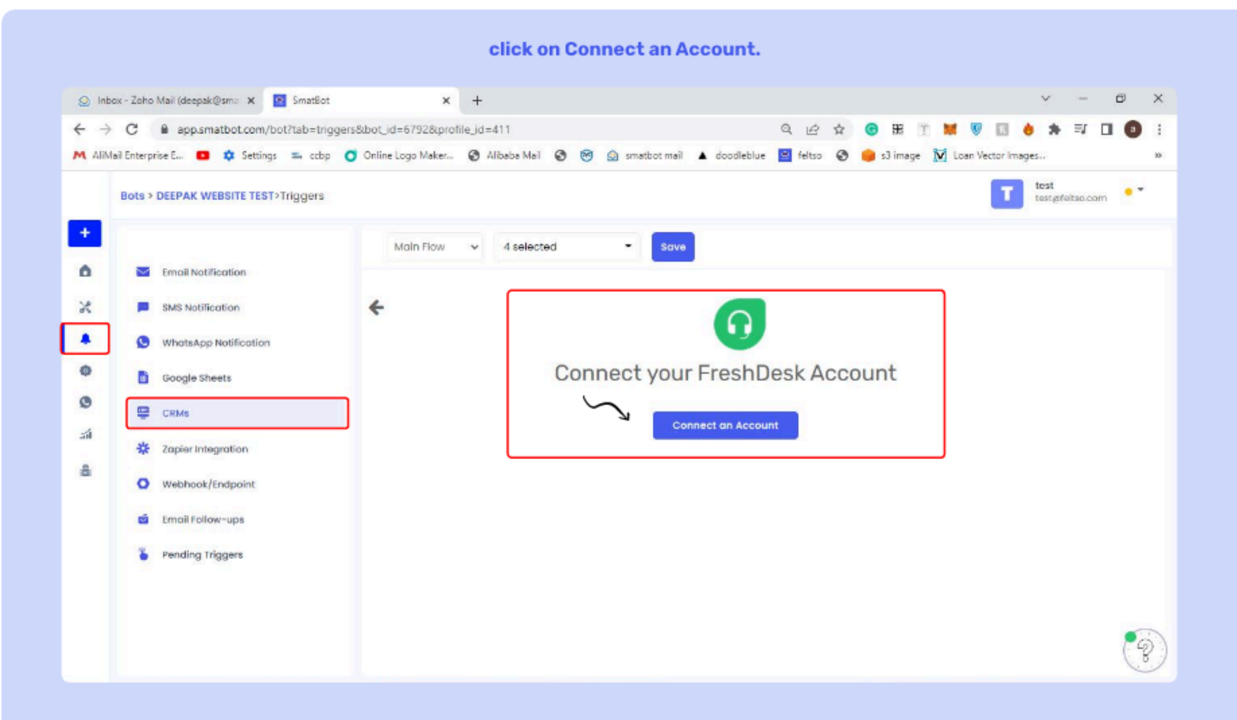
Step 2

Go to **Triggers** and navigate to the **CRM integration** section.



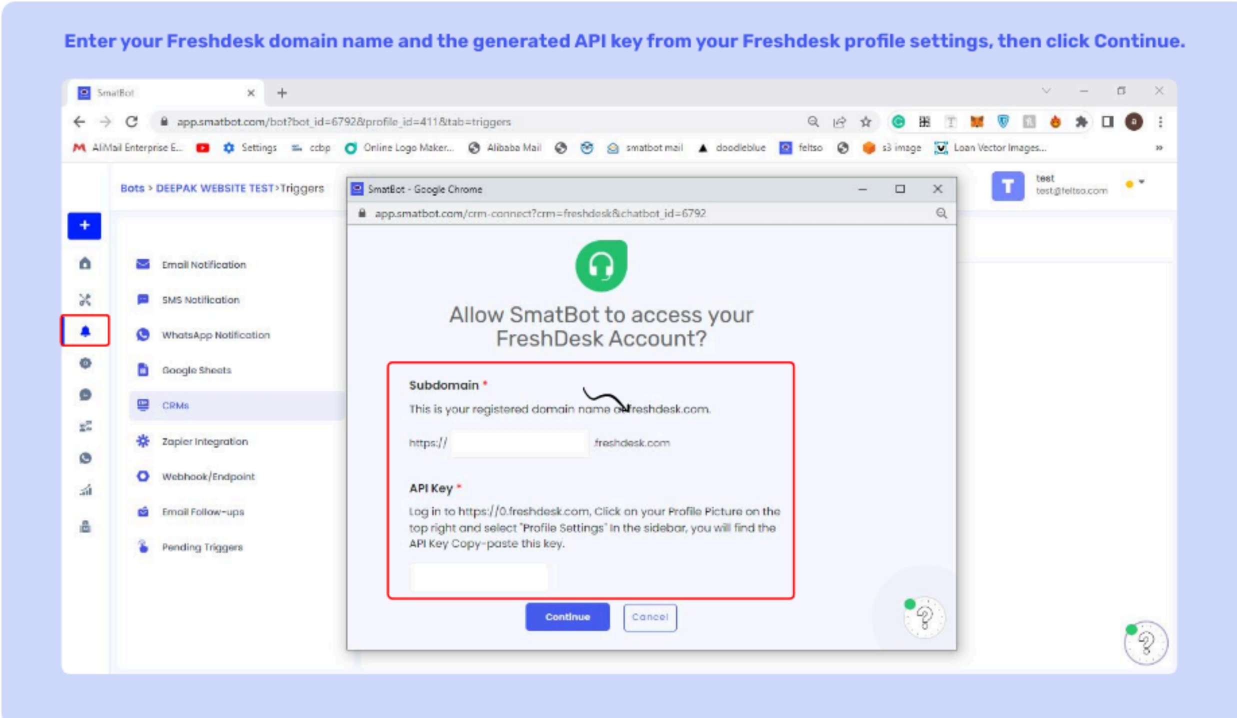
Step 3

Select **Freshdesk or Freshsales** from the listed CRMs and click on **Connect your Account**.

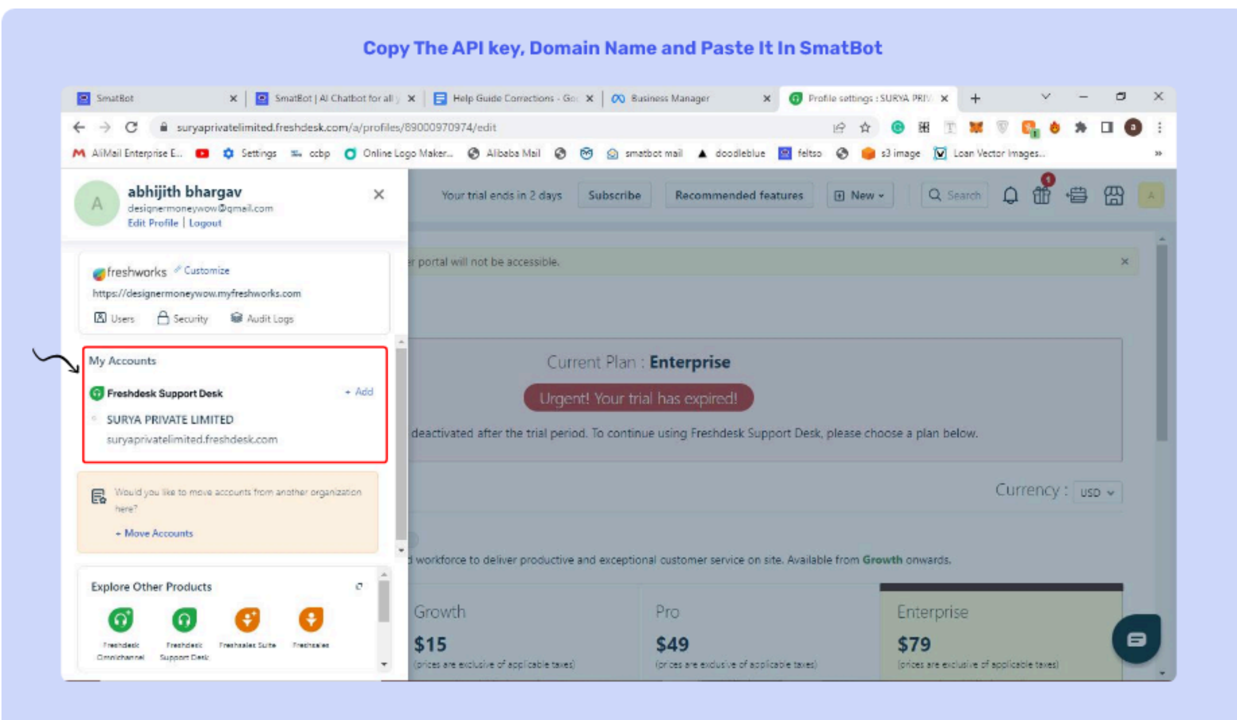


Step 4

In the popup window, type in your Freshdesk/Freshsales domain name and the generated API key that you can find in your profile settings in Freshdesk/Freshsales and click **Continue..**

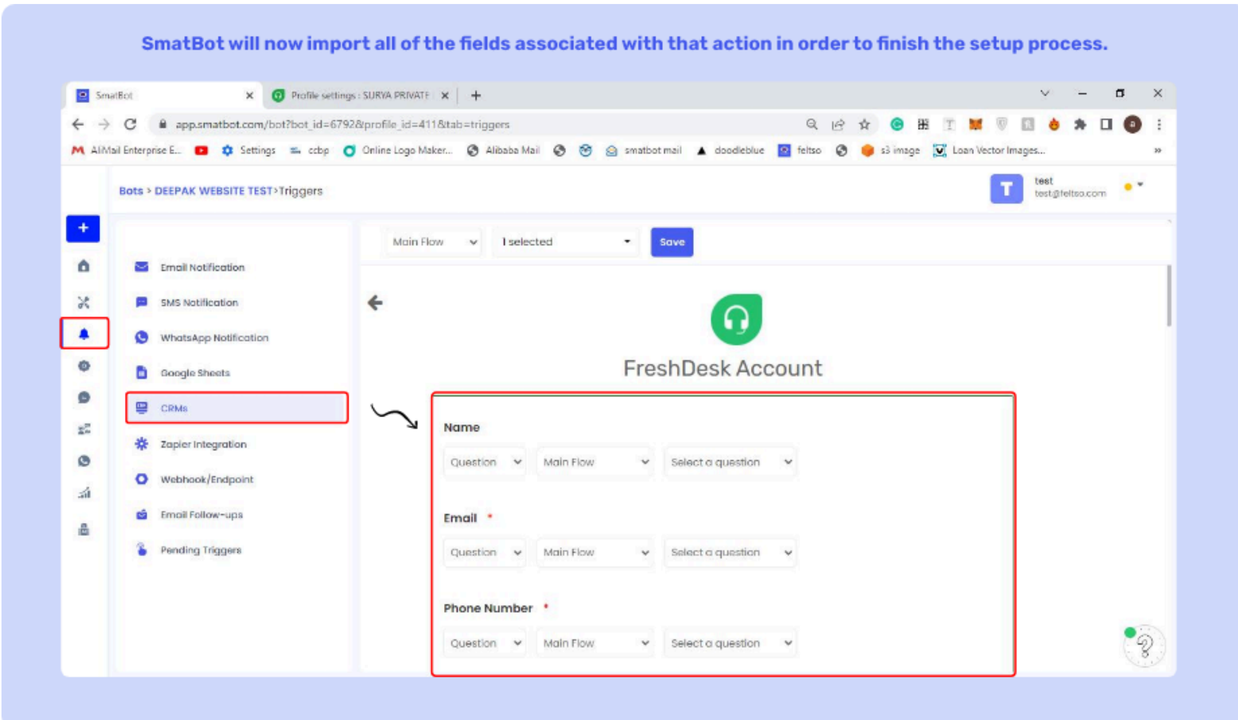


To get your Freshdesk/Freshsales API key, go to your Freshdesk/Freshsales account => Profile settings => Click on **Generate API key** in the top right corner of your profile settings.



Step 5

- Next, select the Action **Create new ticket** or **Create new contact** based on your requirement and click on **Continue**
- SmatBot will now import all the fields related to that action.



Step 6

Now, fill the fields with bot question types (listed below) to assign values to your Freshdesk/Freshsales tickets or contacts

Field types:

Question: Use the response made to a specific question in SmatBot to fill a field in your CRM. E.g: To fill the mobile number field in Freshdesk/Freshsales CRM, select the question where the user enters their mobile number.

Static Text: Fill in a field in your CRM that needs to be set to a default/preset value using static text.

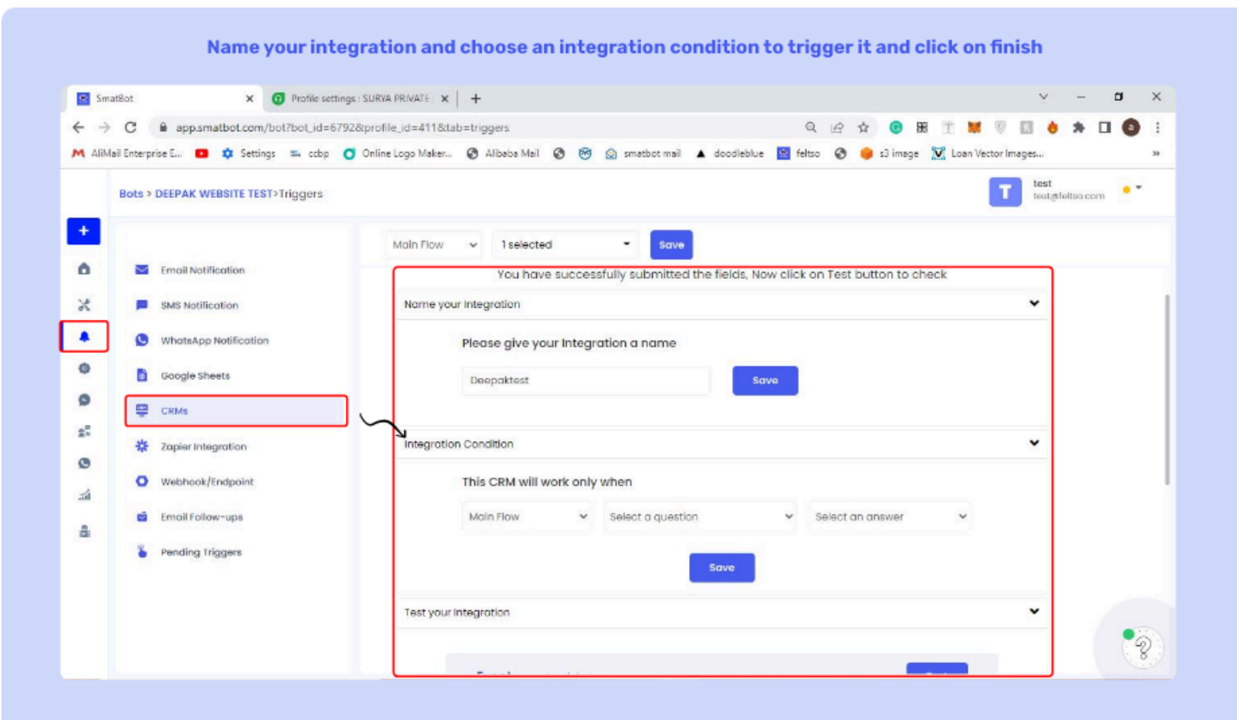
Data Composition: Assign multiple questions, static fields or a combination of both these to a single field in your CRM.

Email: When a user enters their email in any one of the flows, the email will be pushed to your CRM.

Once you finish setting up all the fields, click on **continue**.
Note: Fields marked as * are mandatory to fill out for the CRM.

Step 7

Now that your setup is complete, give it a name and click on **Save**.



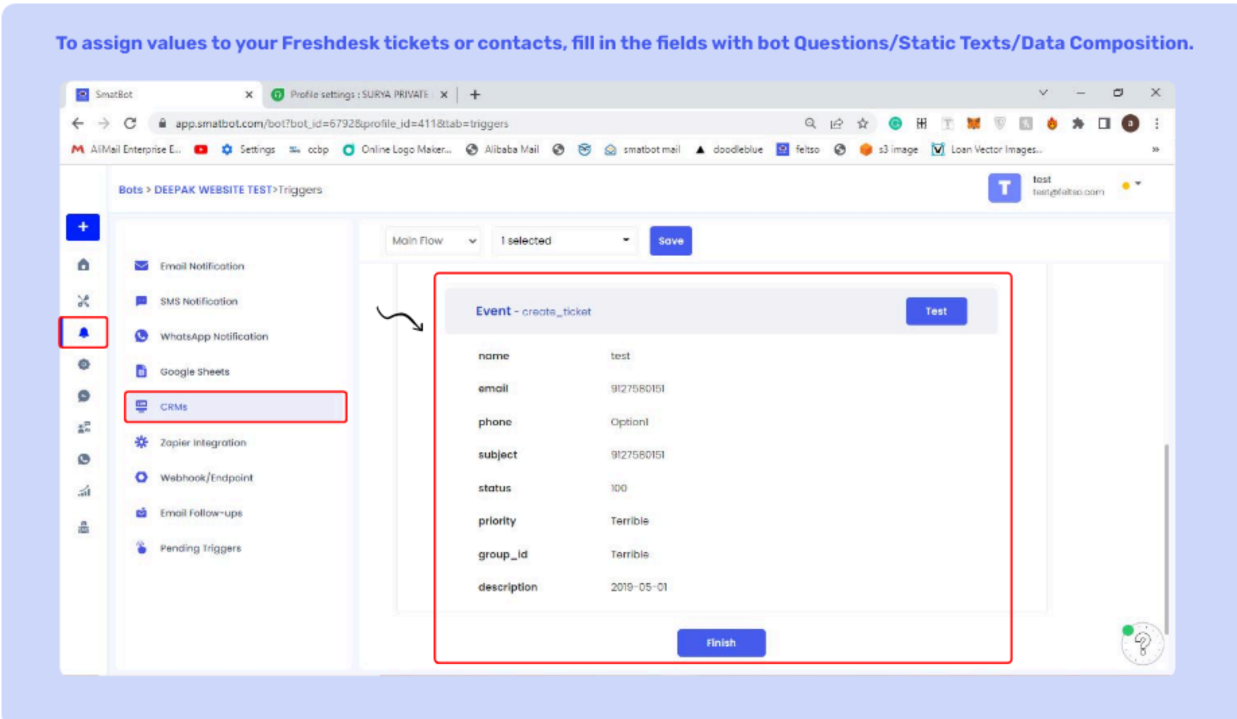
Step 8

Select the condition to trigger the integration and push data to your CRM

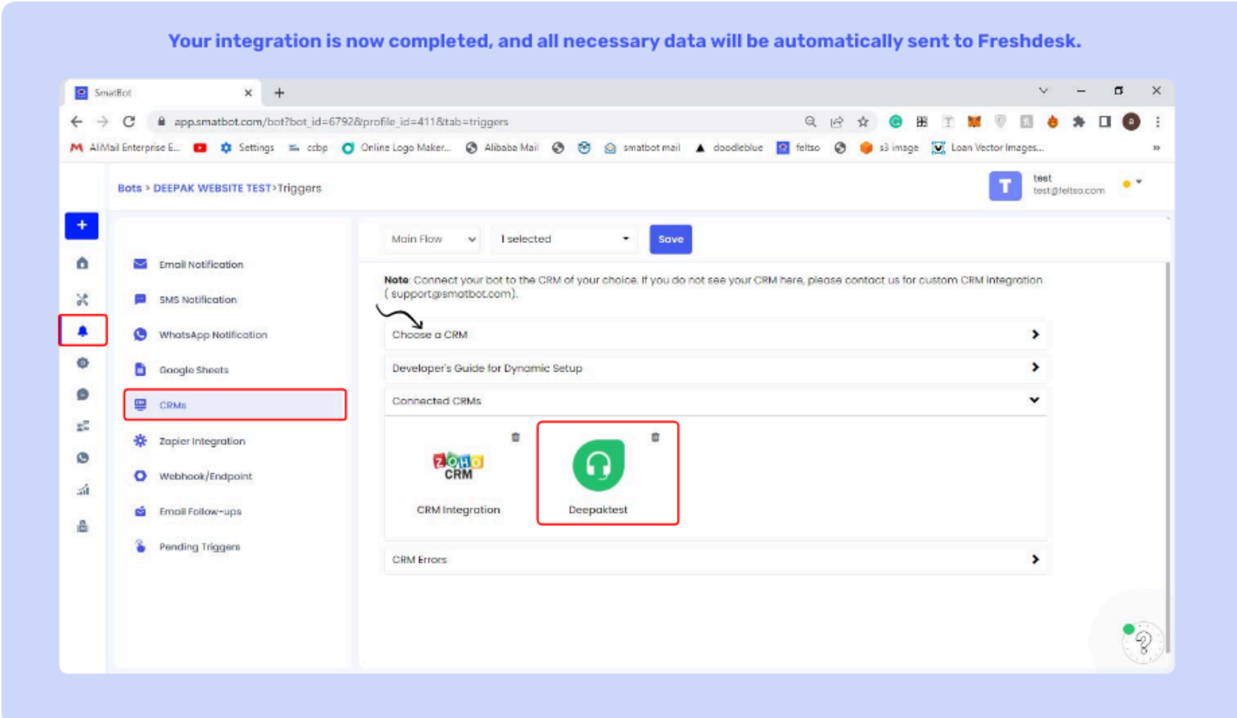
Note: Leave this blank if you don't have any such conditions.

Step 9

You can test the integration by clicking on the **'Test'** button below. Click on **finish** to complete the setup.



Your integration is now complete and all the required data will automatically be sent to your Freshdesk/Freshsales CRM.



Developer's Guide for Dynamic Setup

- **First, install the bot on your website/dashboard.**
- Next, set up the user's first name, last name, email, and phone using the functions listed below.
- To set the user's first name: window.botWidget.setUserFirstName('First Name')
- To set the user's last name: window.botWidget.setUserLastName('Last Name')
- To set the user's email: window.botWidget.setUserEmail('email@gmail.com')
- To set the user's phone number: window.botWidget.setUserPhone('9999999999')
- **Make sure to set these values before the bot opens up.**
- **You can use these values in dynamic questions to alter the flow based on them, or send this information to your CRM software.**

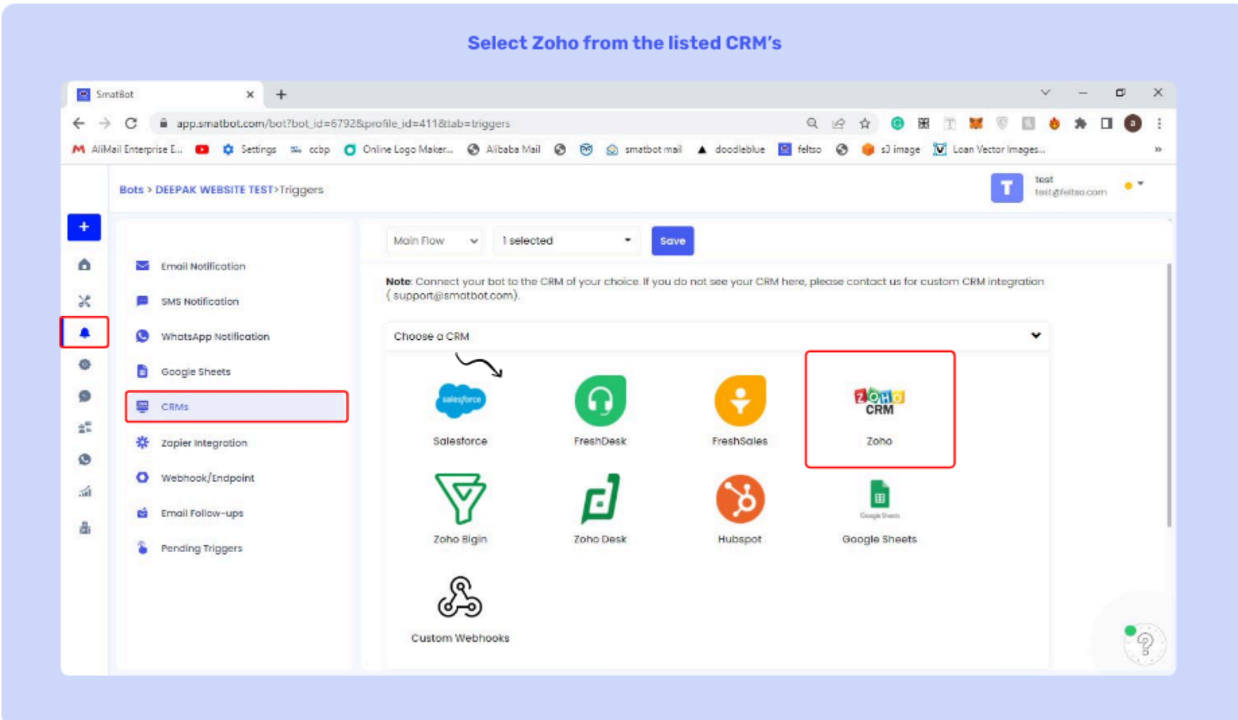
Zoho Integration with SmatBot

Step 1 :

[Login](#) into Smatbot and open your Bot.

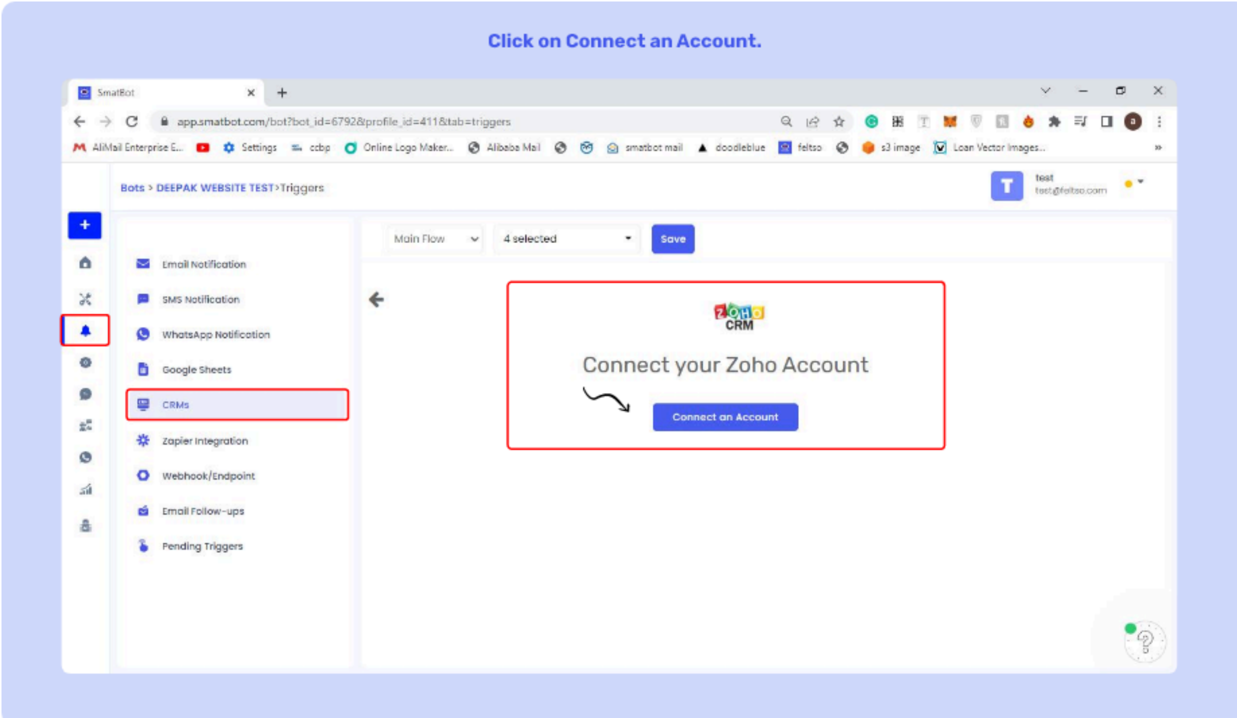
Step 2

Go to **Triggers** and Navigate to the **CRM integration** section.



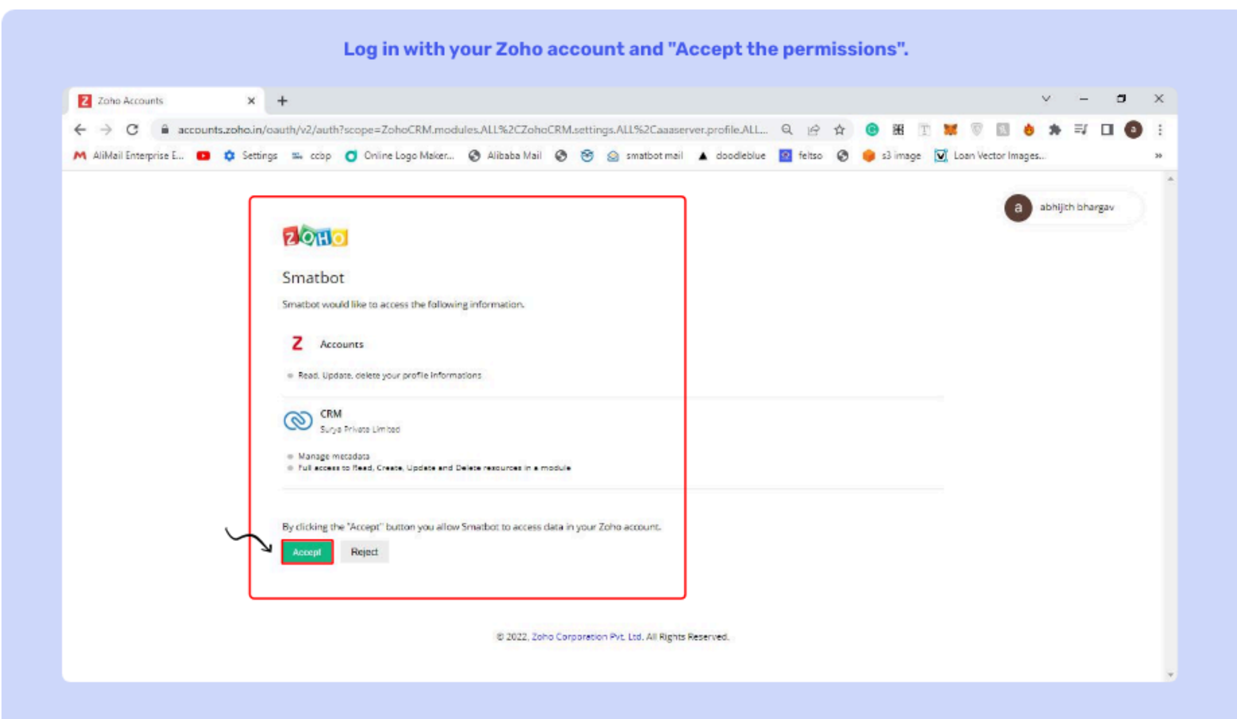
Step 3

Select **Zoho CRM** from the listed CRMs and click on **Connect your Account**.



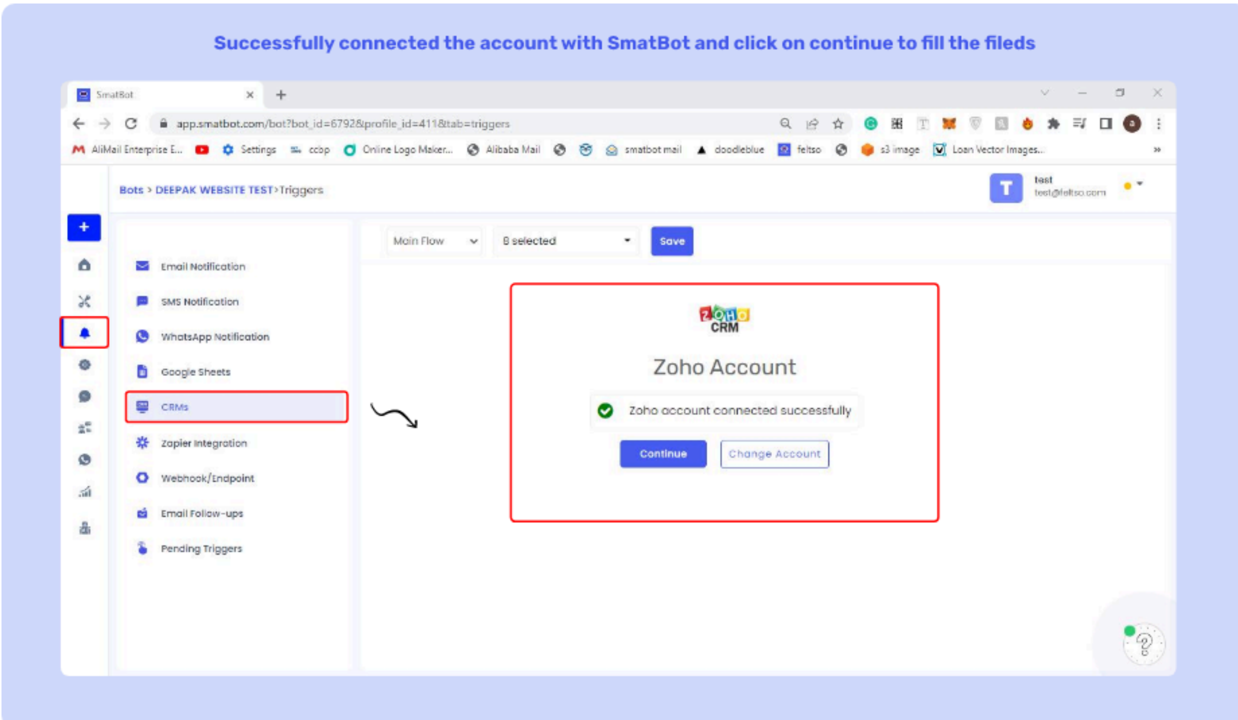
Step 4

Next, in the popup window, login with your Zoho account and accept the permissions.
Great! Your Zoho account is now connected to SmatBot.



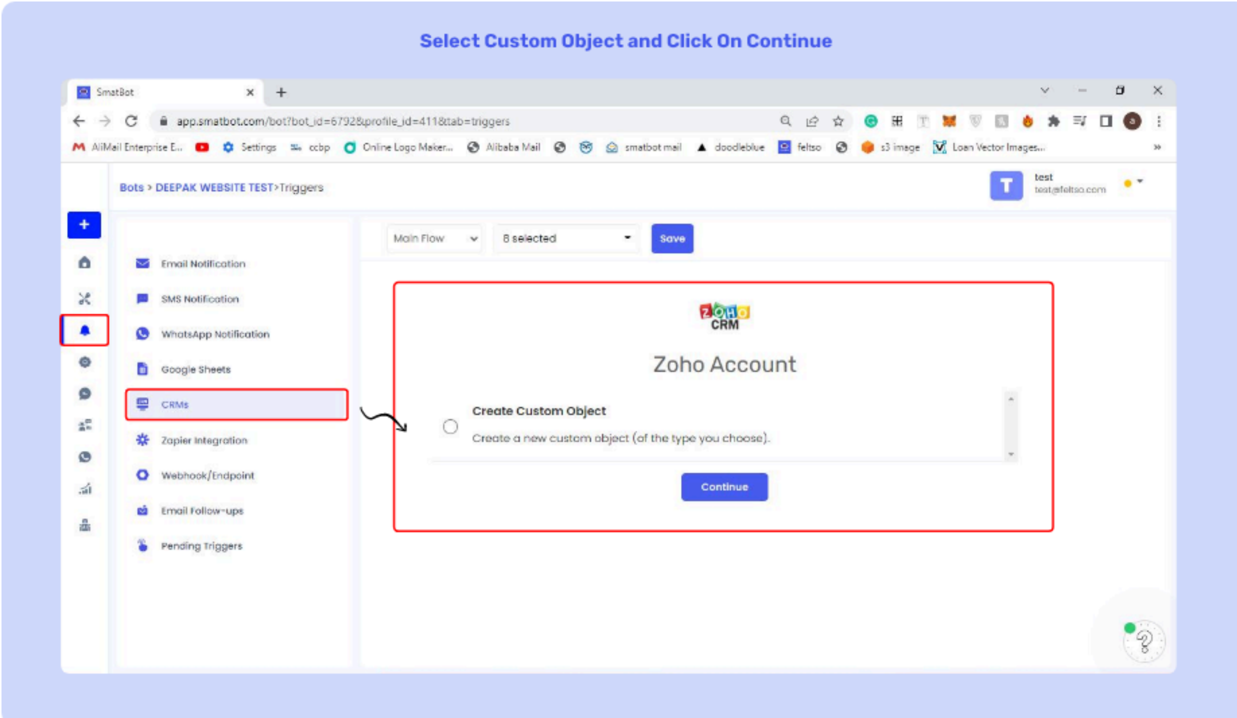
Step 5

Set up the triggers and assign the bot conversations to the respective CRM fields, and click on **Continue**.



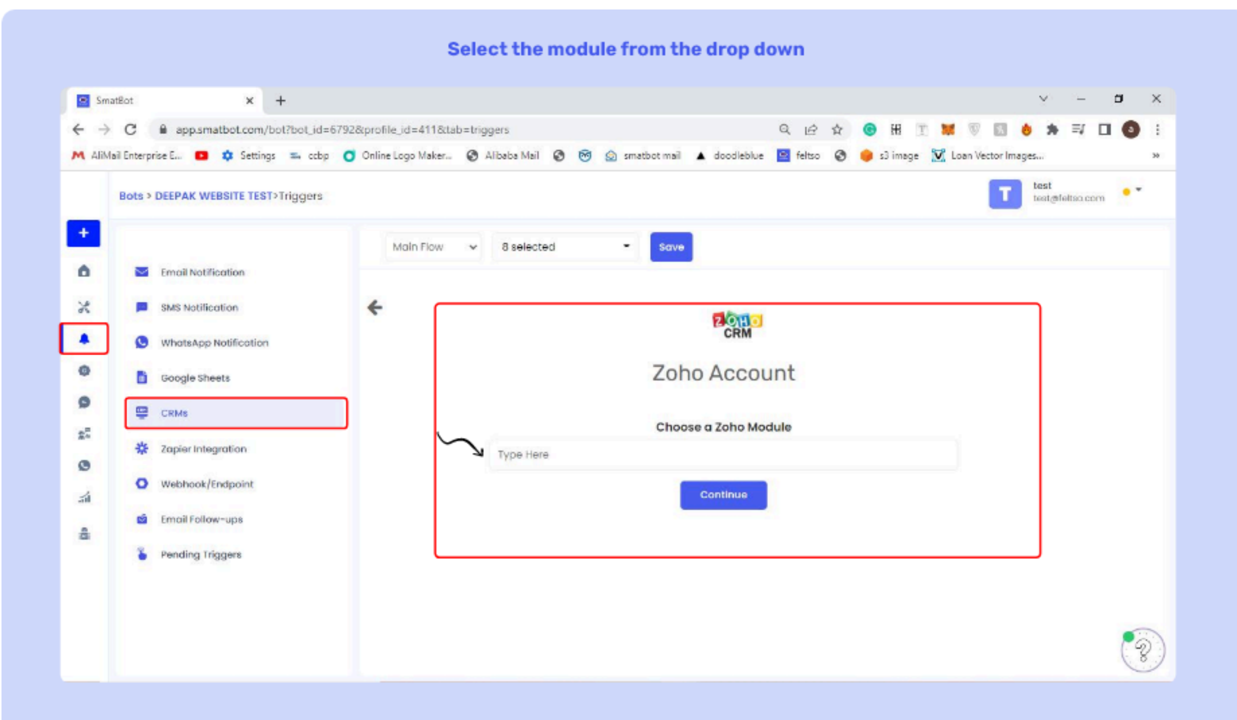
Step 6

To push the leads to your respective Zoho Objects/modules, select 'Create Custom Object' and click on **Continue**. Search for your module and then **Select a Zoho Module**.



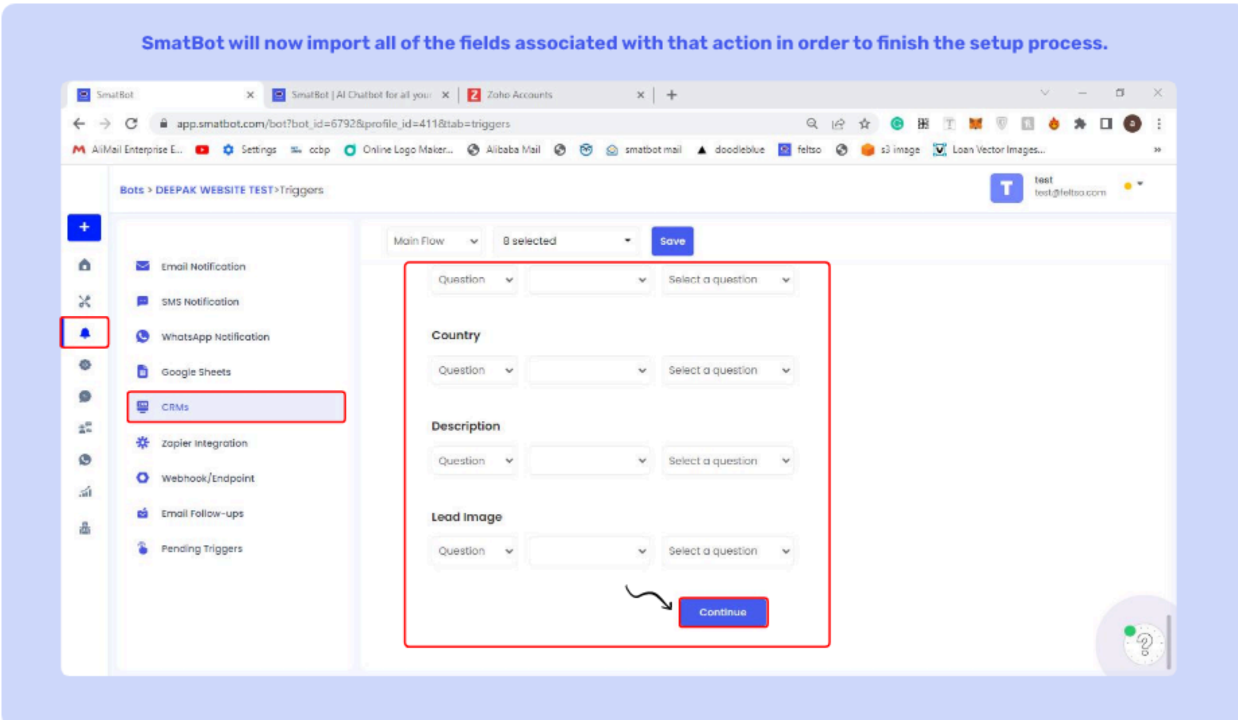
Step 7

If you need to create a lead in Zoho CRM, select the **Leads Module**, and click on **continue**.



Now fill the fields with Bot Question types (listed below) to assign values to your Zoho modules.

Field types:



Question: Use the response made to a specific question in SmatBot to fill a field in your CRM. E.g: To fill the mobile number field in Zoho CRM, select the question where the user enters their mobile number.

Static Text: Fill in a field in your CRM that needs to be set to a default/preset value using static text.

Data Composition: Assign multiple questions, static fields or a combination of both these to a single field in your CRM.

Email: When a user enters their email in any one of the flows, the email will be pushed to your CRM.

Once you finish setting up all the fields, click on **continue**.
Note: Fields marked as * are mandatory to fill out for the CRM.

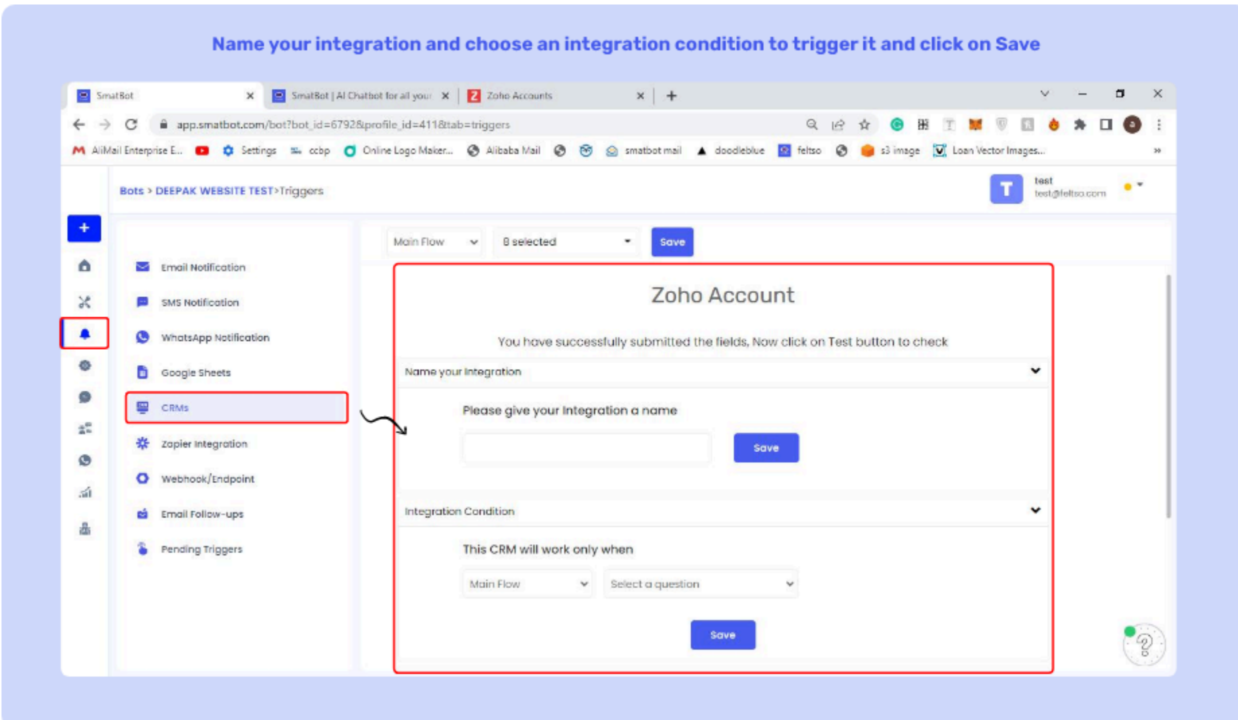
Step 8

Once you finish setting up all the fields, click on **Continue**.

Note: Fields marked as * are mandatory to fill out for the CRM.

Step 9

Now that your setup is complete, give it a name and click on **Save**.



Step 10

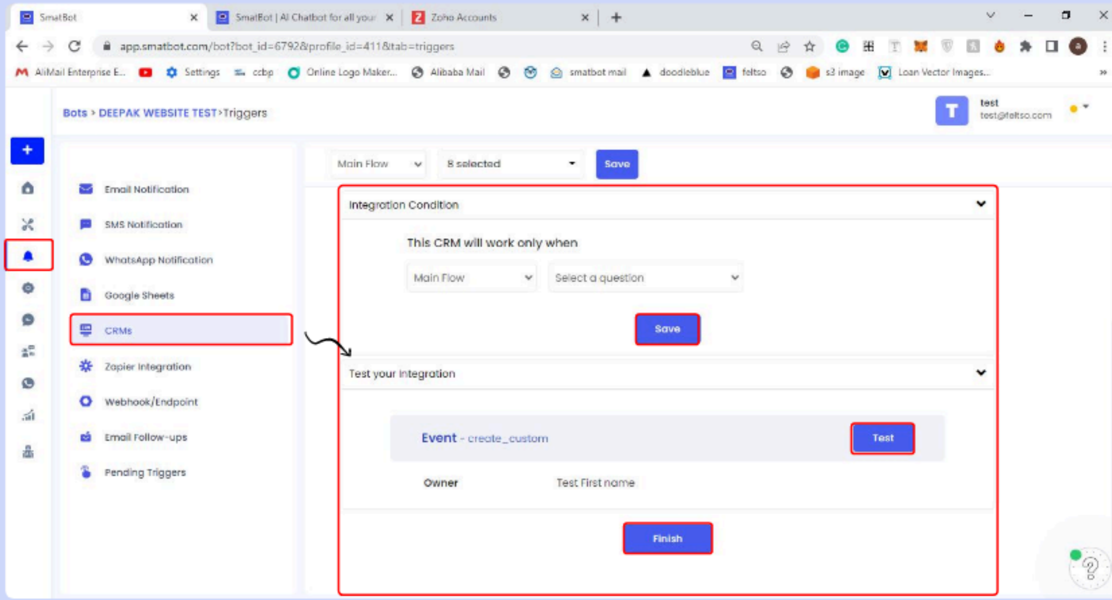
Select the condition to trigger the integration and push data to your CRM.

Note: Leave this blank if you don't have any such conditions.

Step 11

You can test the integration by clicking on the **Test** button below. Click on **finish** to complete the setup.

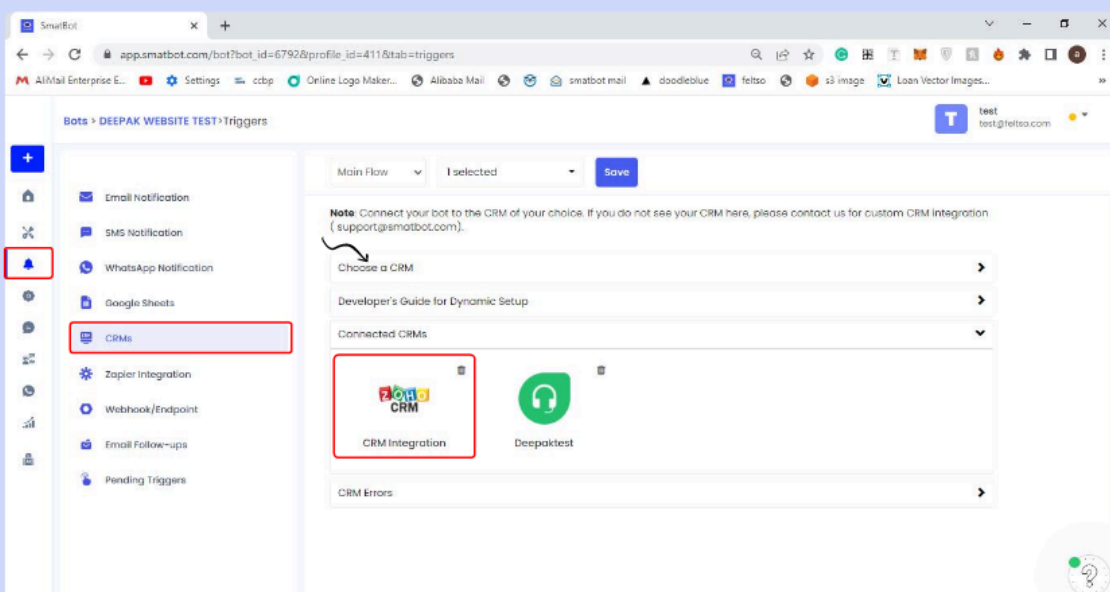
Name your integration and choose an integration condition to trigger it and click on Save



If you want to push the leads from two different flows of a bot to a different module in the **ZOHO CRM**, create a new CRM Integration and repeat the previous steps in this guide.

Congratulations! You have successfully integrated your bot with Zoho CRM.

Your integration is now completed, and all necessary data will be automatically sent to Zoho



Video Guide

Developer's Guide for Dynamic Setup

- **First install the bot on your website/dashboard.**
- **Next, you can set up the user's first name, last name, email and phone using the functions listed below.**
    - **To set user's first name: window.botWidget.setUserFirstName('First Name')**
    - **To set user's last name: window.botWidget.setUserLastName('Last Name')**
    - **To set user's email :window.botWidget.setUserEmail('email@gmail.com')**
    - **To set user's phone number: window.botWidget.setUserPhone('9999999999')**
- **Make sure to set these values before the bot opens up.**
- **You can use these values in dynamic questions to alter the flow based on them, or send this information to your CRM software.**

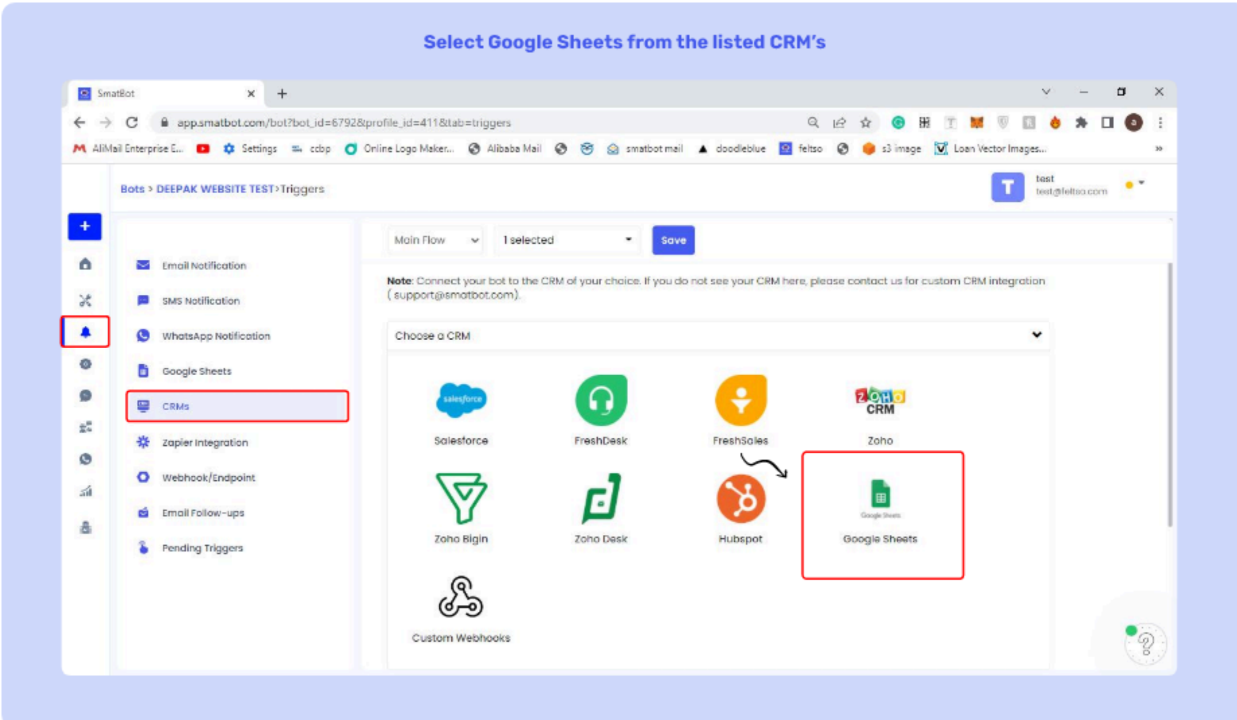
Google Sheets

Step 1 :

Login into Smatbot and open your Bot.

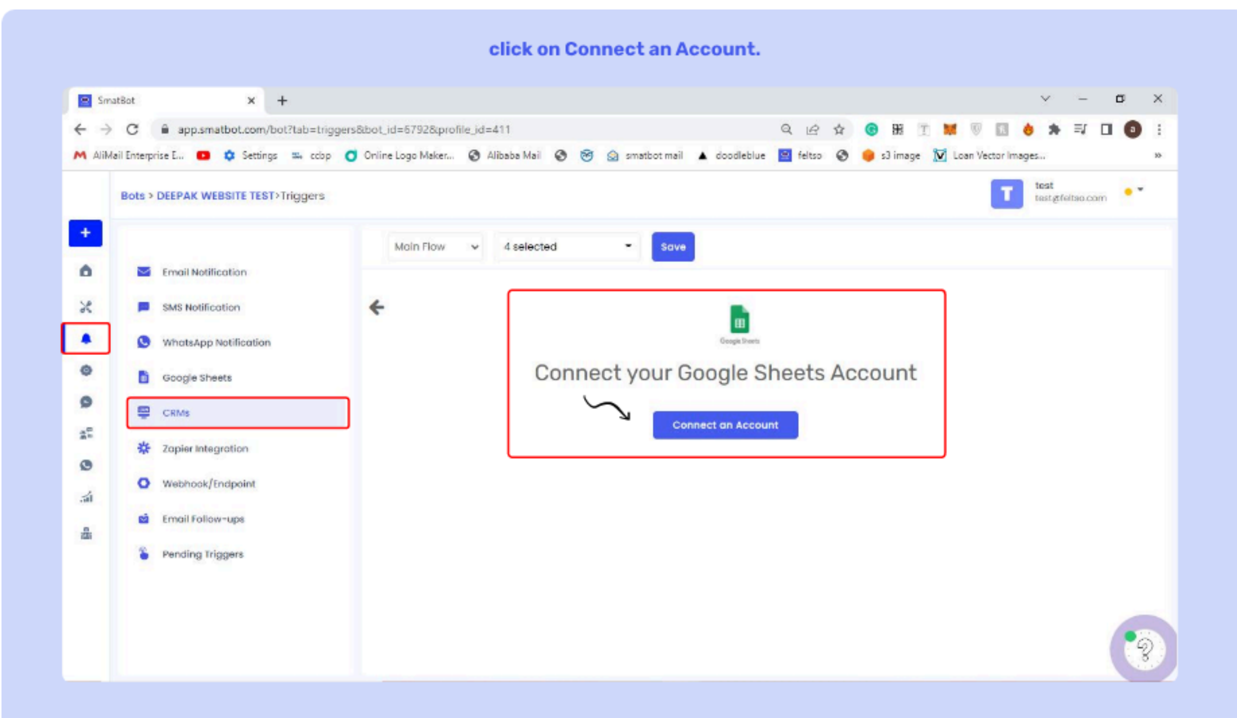
Step 2

Go to **Triggers** and Navigate to the **CRM integration** section.



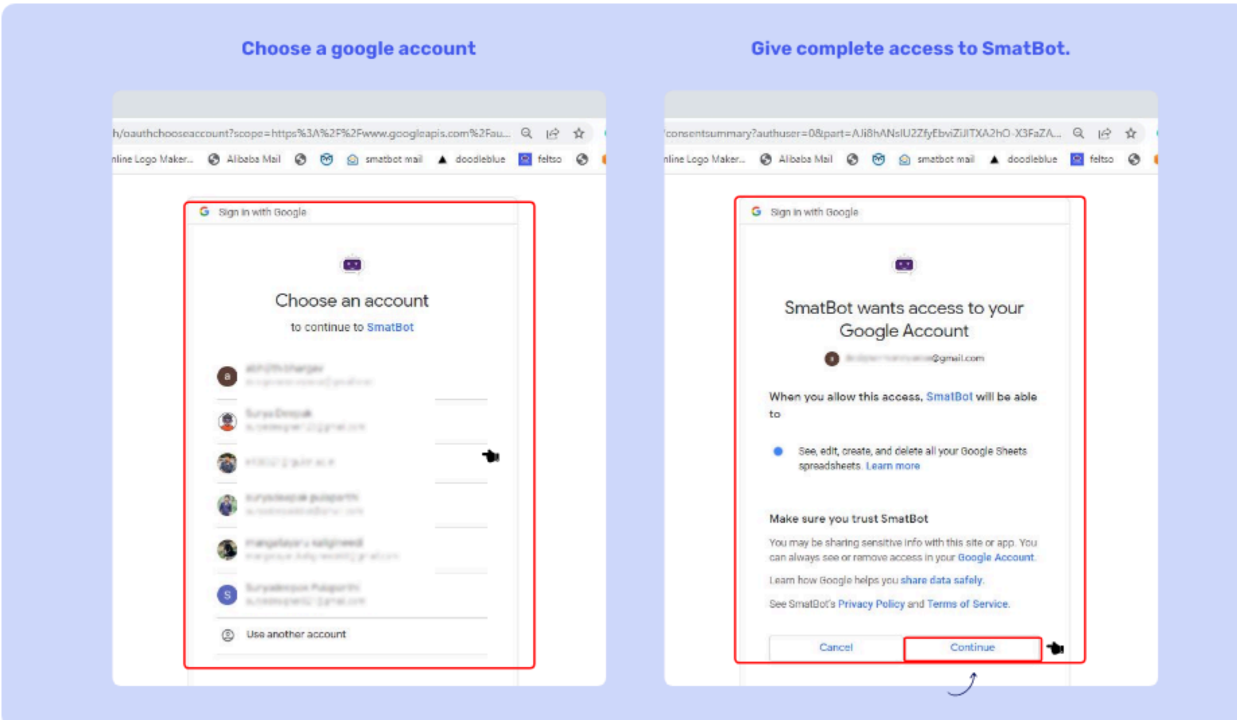
Step 3

Select **Google Sheets** from the listed CRMs and click on **Connect your Account**.



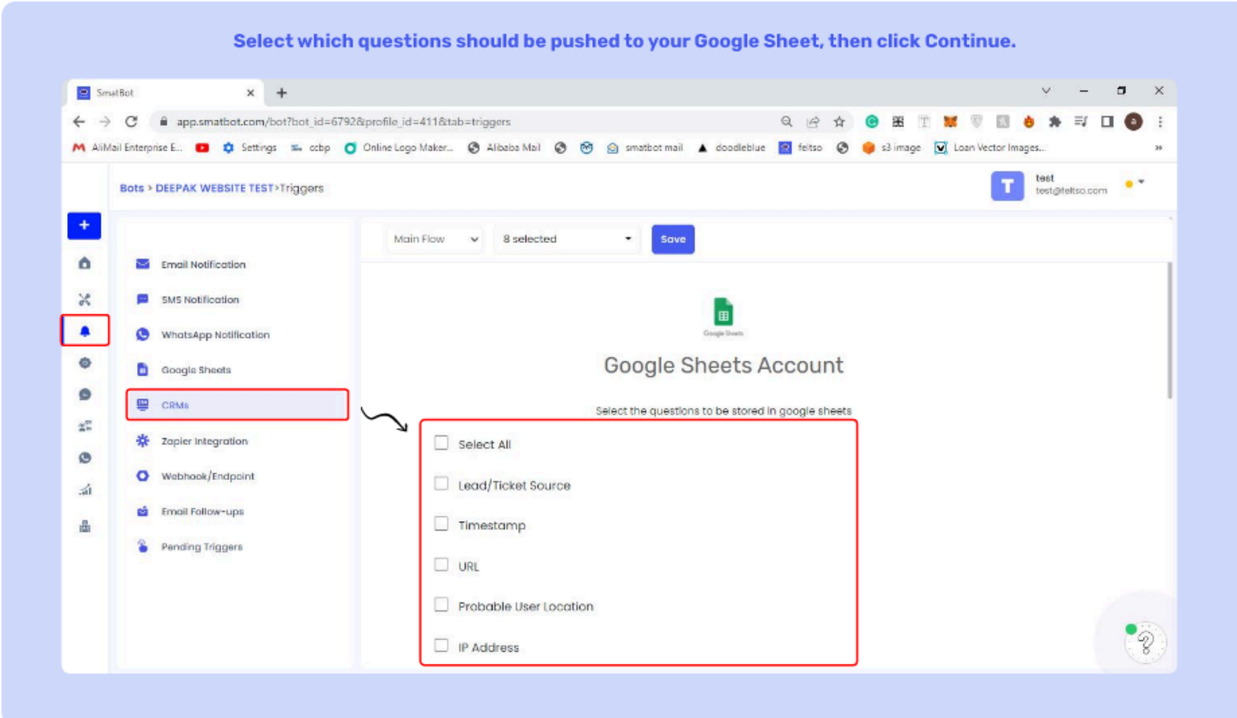
Step 4

[Login](#) with your Gmail credentials and give all permissions to SmatBot.



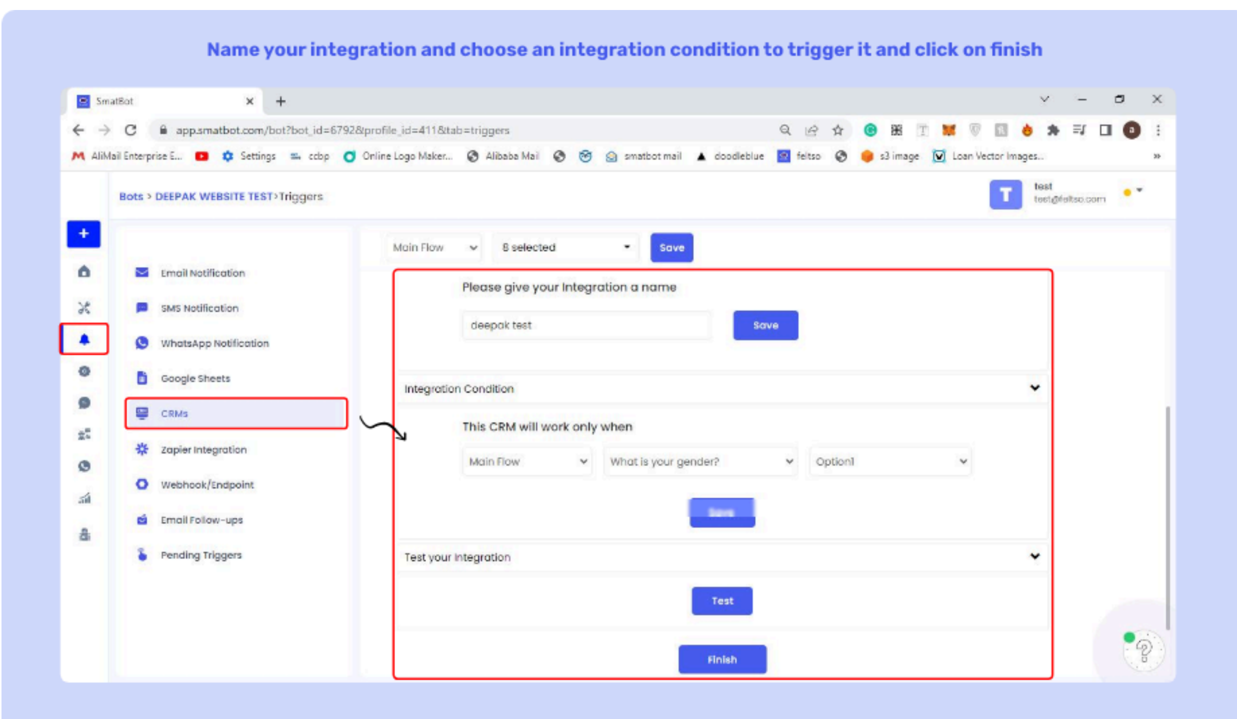
Step 5

Once your Google account is connected, choose the questions that need to be pushed into Google Sheets, and then click on **continue**.



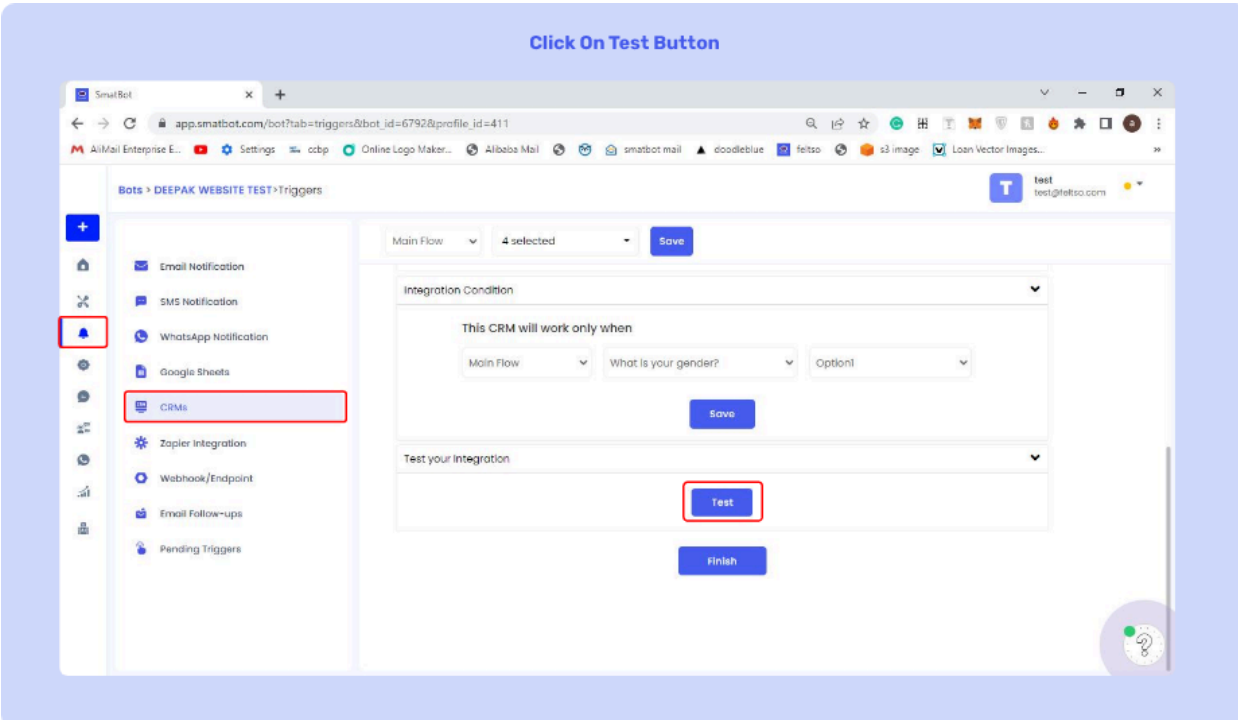
Step 6

Next, give your CRM a name, select a condition if necessary for the data to be pushed and click **Save**.



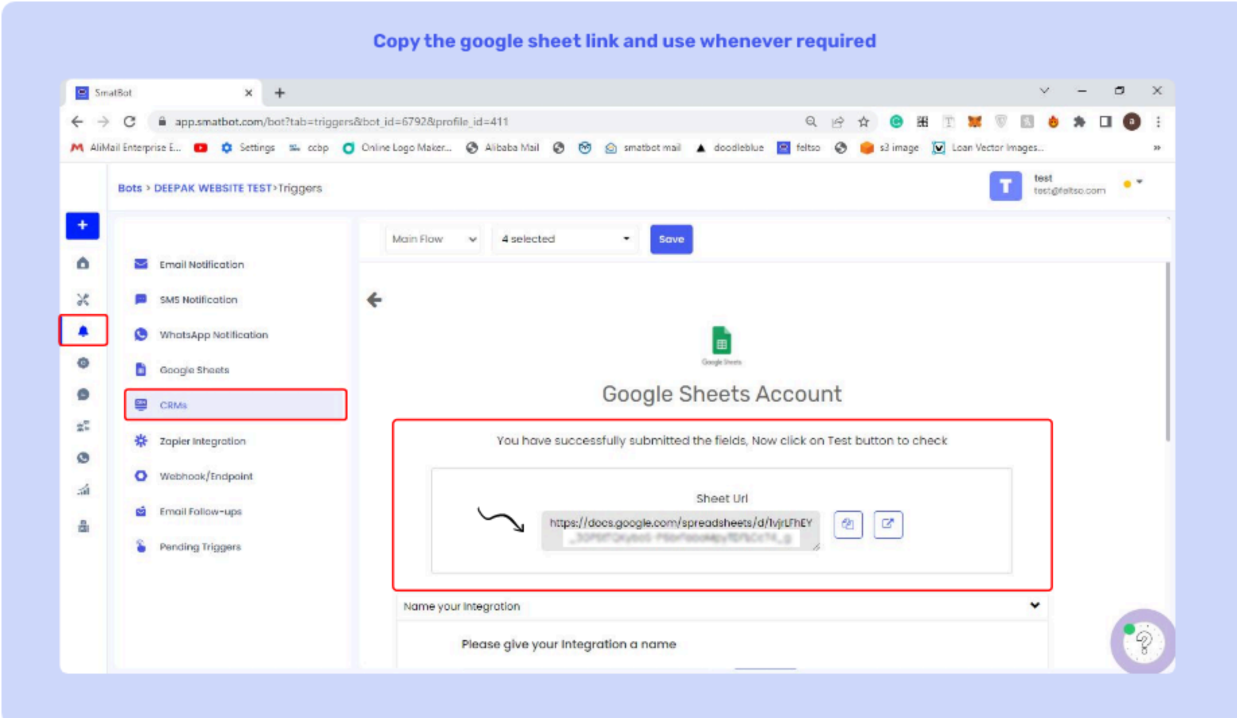
Step 7

Test the integration using the **Test** button.



Step 8

Success! Open the Google Sheet link to access the sheet.



Developer's Guide for Dynamic Setup

- First install the bot on your website/dashboard.
- Now you can set up the user's first name, last name, email and phone using the functions listed below.
    - To set user's first name : window.botWidget.setUserFirstName('First Name')
    - To set user's last name : window.botWidget.setUserLastName('Last Name')
    - To set user's email :window.botWidget.setUserEmail('email@gmail.com')
    - To set user's phone number:window.botWidget.setUserPhone('9999999999')
- Make sure to set these values before the bot opens up.
- You can use these values in dynamic questions to alter the flow based on them, or send this information to your CRM software.

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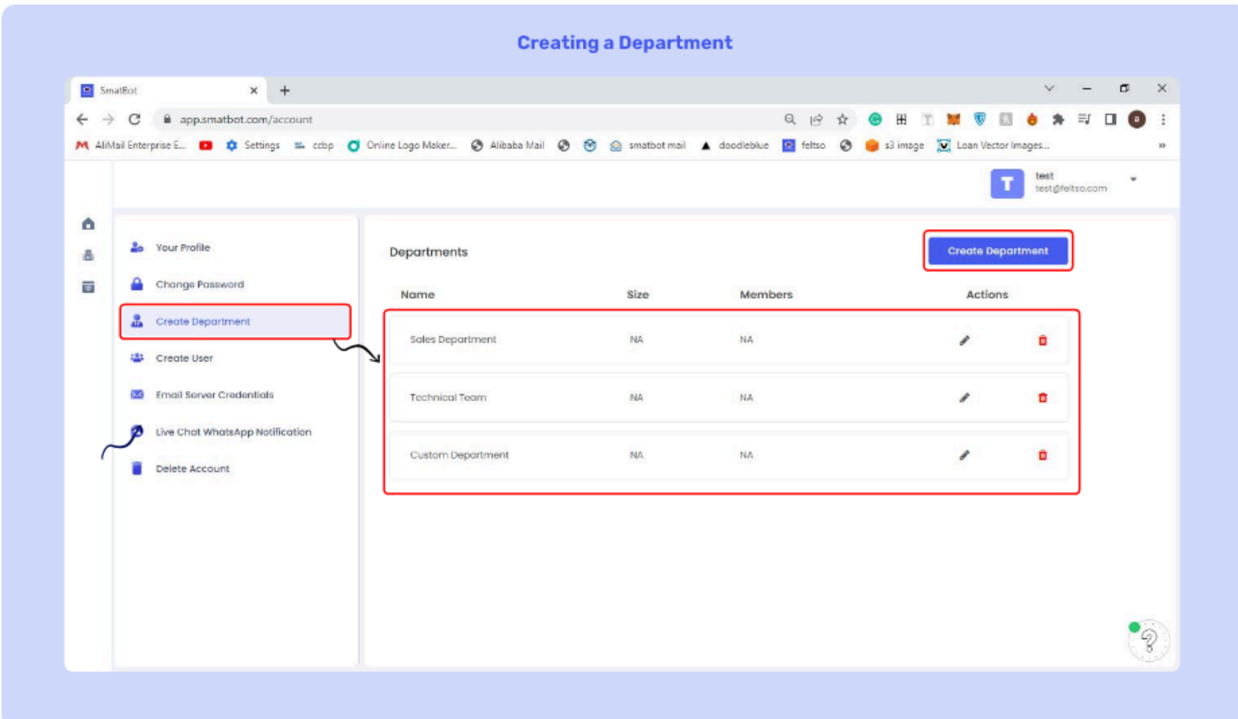
4. Live chat

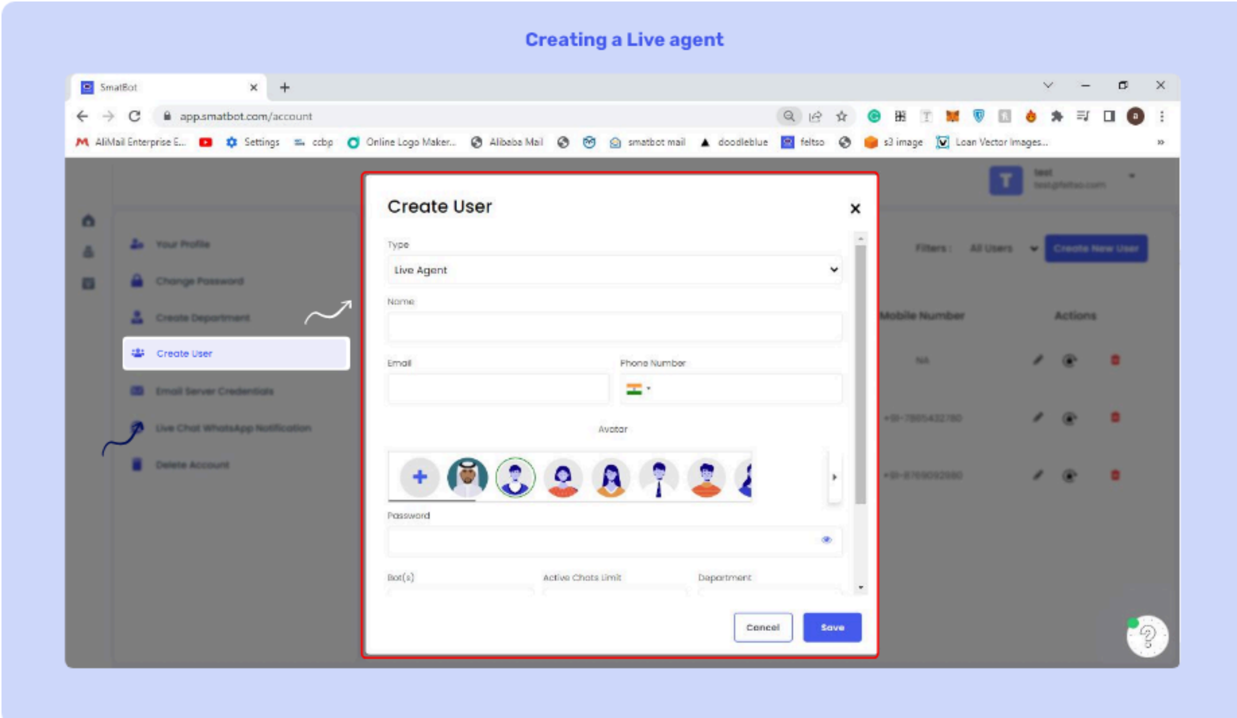
Getting started with live chat

Adding Live Agents to your automated chatbot to create a human-bot hybrid solution helps make customer experience seamless & efficient.

To begin, follow the steps listed below:

1. **Creating Agents, Departments & Roles:**
    a. * ADD IMAGE



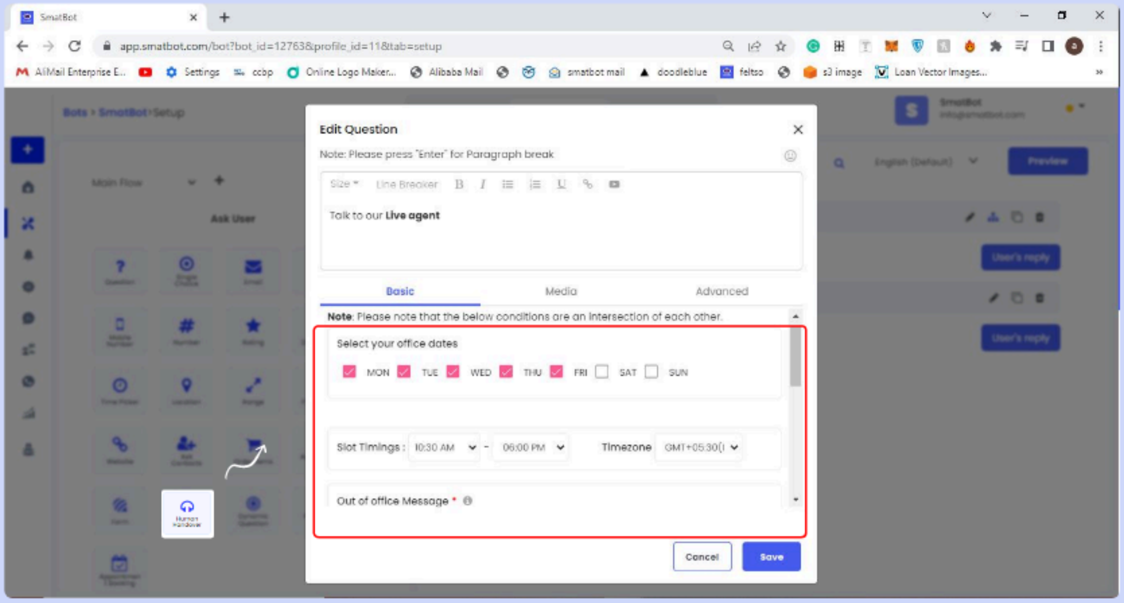


- Login to the SmatBot Dashboard => Account => Create User => Select 'Live Agent' as the User Type.
- Setup departments to organize your agents and assign users to them.
- For each live agent, assign the relevant department & role.
  - Analysts can access analytics only.
  - Supervisors can manage all the live agents, check how many agents are online, and how many chats they are handling at any given moment. They can also assign the chats between agents.
- Next, fill in the necessary details. Select the bots, number of chats you would like the agent to handle & assign a relevant department to each live agent and click on **create**.
- Your Live Chat Agent is ready to go!

2. Setting up Live Chat:

- * ADD IMAGE

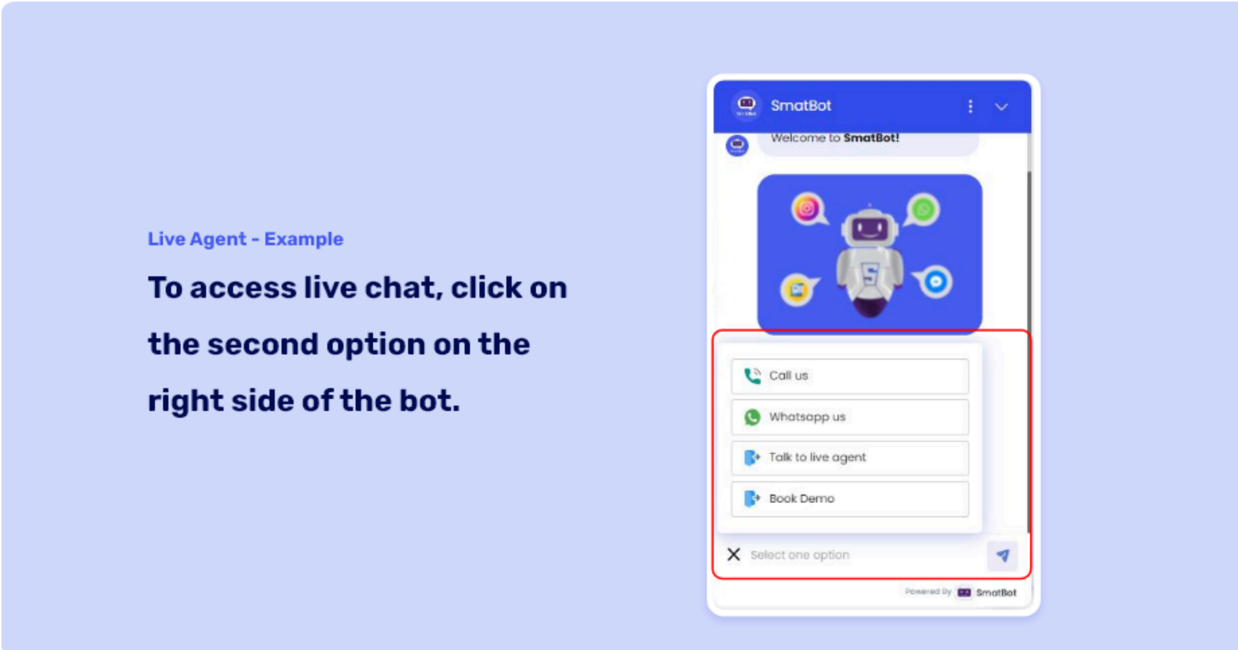
Live Agent - Edit Options



- To set up Live Chat, add the 'Live Agent' Question type to the bot.
- Click on **edit question** & configure the live chat settings based on your preferences.
- **Login** with your credentials using the URL - https://www.smatbot.com/login either as an **'Admin'** or as an '**Agent**'.
- If you have logged in as an 'Admin' you will have six options:- **Setup**, **Trigger**, **Settings**, **Access Chats**, **Live Chats**, and **Analytics** for the bots you have already created.
- If you have logged in as an 'Agent' you will have access to only two options - **Access Chats** and **Live Chats**.
- The Admin can add any number of agents (based on their subscription) and access the live chats of all agents. Whereas, for agents to get access to a particular chat, they must first request the agent who is currently part of the live chat.

3. Using Live Chat:

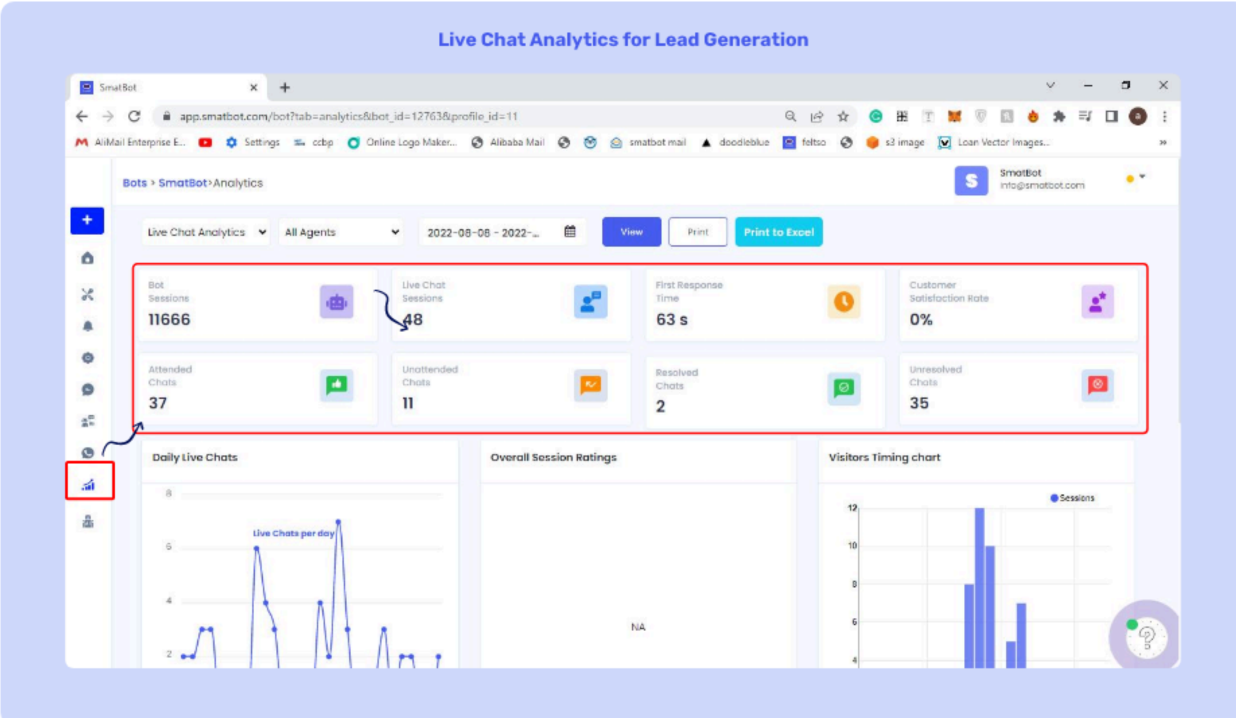
- * ADD IMAGE



- To access live chat, click on the second option on the right side of the bot.
- Access the active chats by clicking on them. **Note**: Mark a chat as important by clicking on the **star** button.
- You can:
    - **Add a Name** to Chat, **Hide Chat**, Close **Chat** , Mark **as Resolved**, **Request Feedback** or **Assign to a Different Agent** (If the query raised by a user is not relevant to you, you can send the query over to another agent who can resolve it).
- Canned Responses: You can set up repeated or top queries asked by a user with Canned Responses.
- You can email the entire transcript of the chat to the user or yourself/your team.

4. Analytics & Live Chat Data

- * ADD IMAGE



- You can check detailed analytics of live chat using our analytics dashboard.
- Likewise, you can download all live chat data at any point by adding a date range or filtering based on your requirements.

5. Agent Status & Routing

- **Agent Status** : Agents can set their status directly from the dashboard. We currently have two available options.
  - Online
  - Away
- **Routing** : SmatBot automatically routes all the user requests and assigns them to the available agents who are online based on the number of concurrent chats they are handling in real-time.

Note: Default offline message : When no agents are available to assist the users, a default message is shown. This message can by chosen by the user.

---

5. Analytics

Smatbot provides useful metrics that you can use to analyze and improve your business processes. Use our Analytics dashboard to understand what users value, what frictions your users have & how to improve your overall user experience.

For any custom metrics /analytics please contact us at **support@smatbot.com**

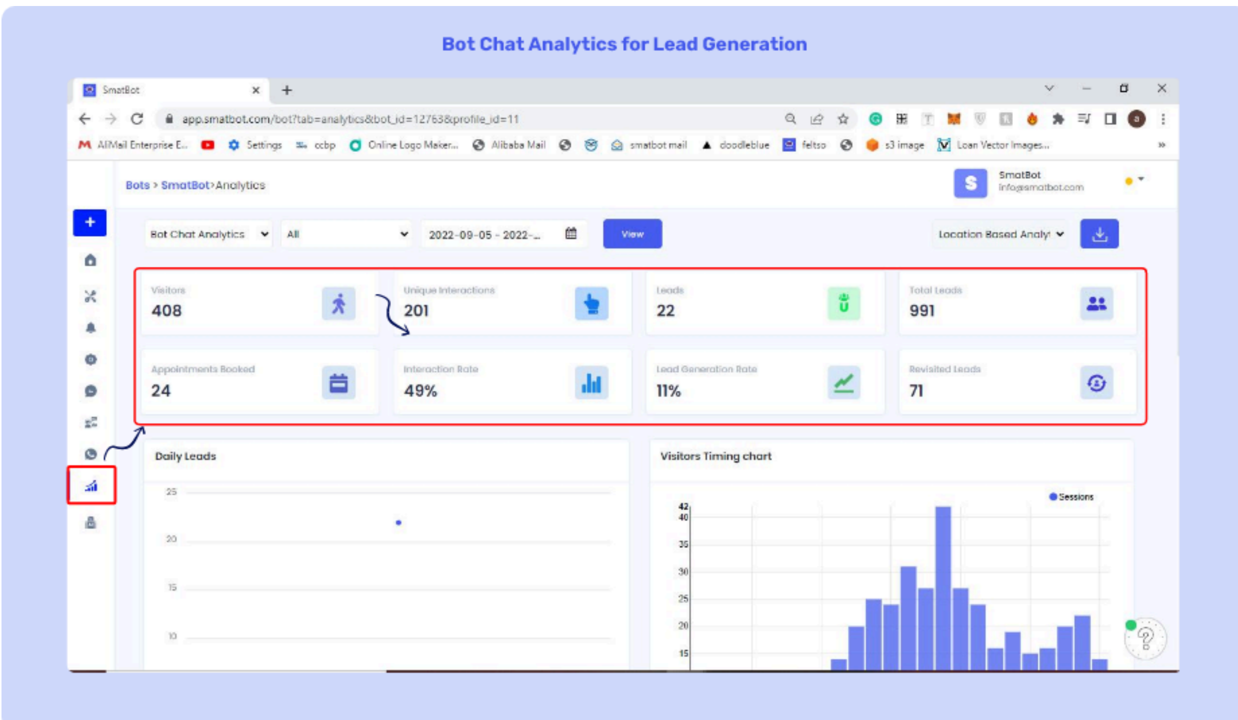
To access our analytics dashboard: Log in to your SmatBot account > Click on the analytics icon of your bot > Click on the left sidebar and choose analytics

i. * ADD IMAGE

b. **Select the analytics you wish to see and select the date range.**

i. * ADD IMAGE

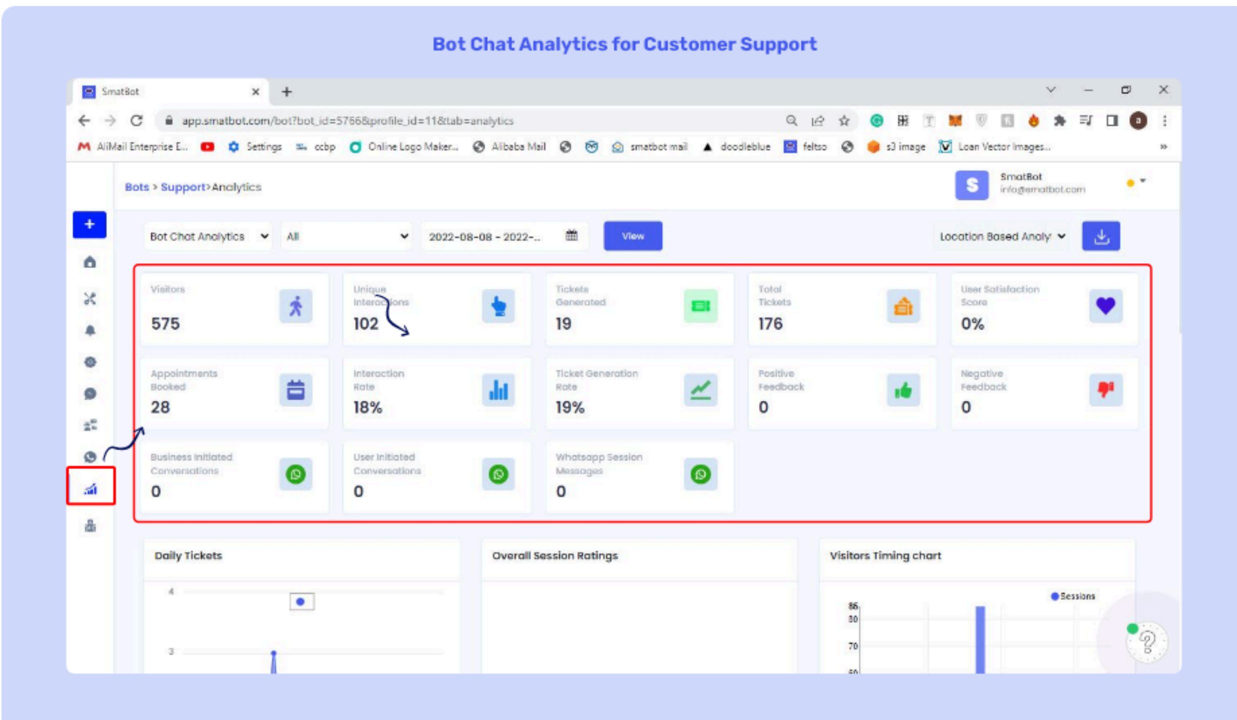
- **Bot Chat Analytics for Lead Generation**



- Visitors: Total number of users the bot tracked.
- Unique Interactions: Number of unique visitors who interacted with the bot.
- Leads: Number of leads generated in a selected date range.
- Total Leads: Total number of leads generated since inception of the bot.
- Appointments Booked: Total number of appointments booked in selected date range.
- Interaction Rate: Percentage of visitors who interacted with the bot against the total number of visitors.
- Lead Generation Rate: Percentage of leads generated with respect to total interactions.

- Revisited Leads: Number of leads who visited your website multiple times.
- Daily Leads: The leads generated on a daily basis are separated into the selected date range
- Visitors Timing chart: Daily visitor timing chart of bot interactions.
- Option Wise Feedback: Feedback of the options selected by the user in the bot.
- Skipped Questions: Skipped question by the user.
- Top 10 External Sources: External Lead sources.
- Top 10 Internal Sources: Internal Lead sources.

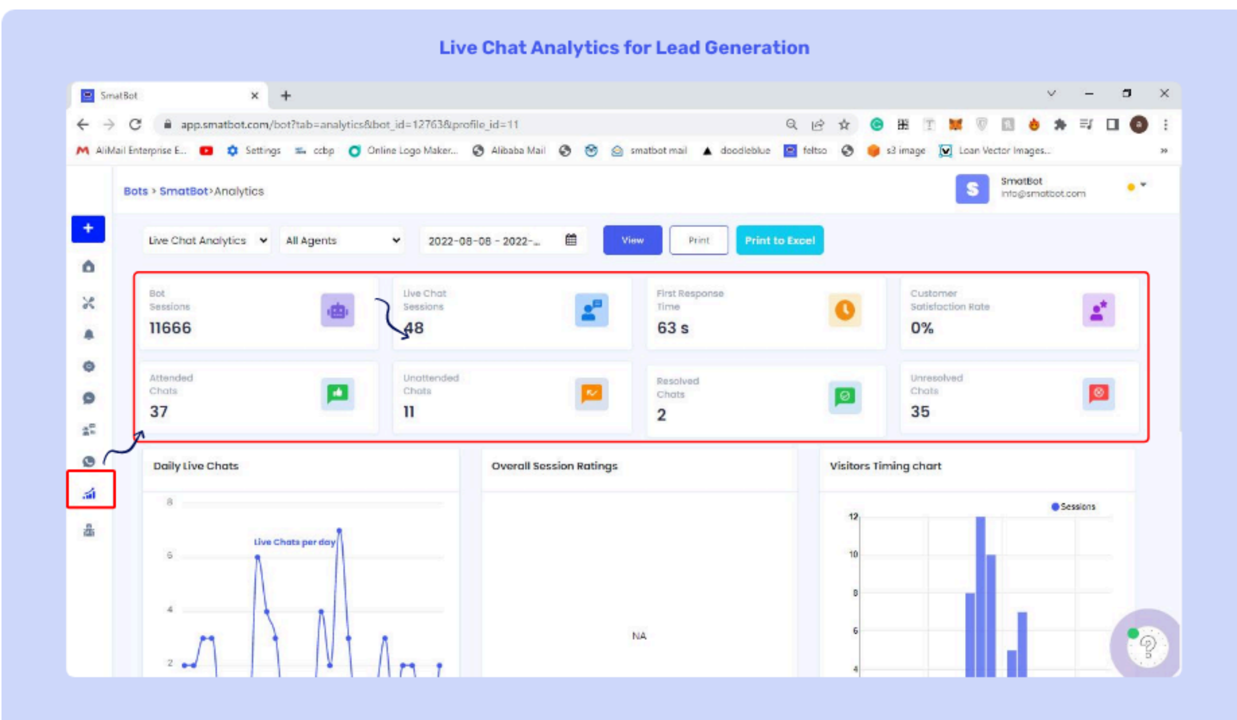
- **Bot Chat Analytics for Customer Support**
- * ADD IMAGE



- **Visitors: Total number of users the bot tracked.**
- **Unique Interactions: Number of unique visitors who interacted with the bot.**
- **Tickets Generated: Number of tickets generated in selected date range.**
- **Total Tickets: Total number of tickets generated since inception of the bot.**
- **Appointments Booked: Total number of appointments booked in selected date range.**
- **Interaction Rate: Percentage of visitors interacted with respect to total visitors.**

- User Satisfaction Score: Satisfaction rate of customers with respect to the individual feedbacks given to bot answers.
- Ticket Generation Rate: Percentage of tickets generated with respect to total interactions.
- Positive Feedback: Number of positive feedback given to individual bot answers.
- Negative Feedback: Number of negative feedback given to individual bot answers.
- Visitors Timing chart: Daily visitor timing chart of bot interactions.
- Overall Session Ratings: Average rating given to the chat session by the users
- Response Wise Feedback: Feedback breakdown of individual bot answers
- Option Wise Feedback: Feedback breakdown of the options selected by the user in the bot
- Intent Wise Breakdown: Number of times Particular AI intents are fetched.
- Skipped Questions: Skipped question by the user.
- Top 10 External Sources: External Lead sources.
- Top 10 Internal Sources: Internal Lead sources.

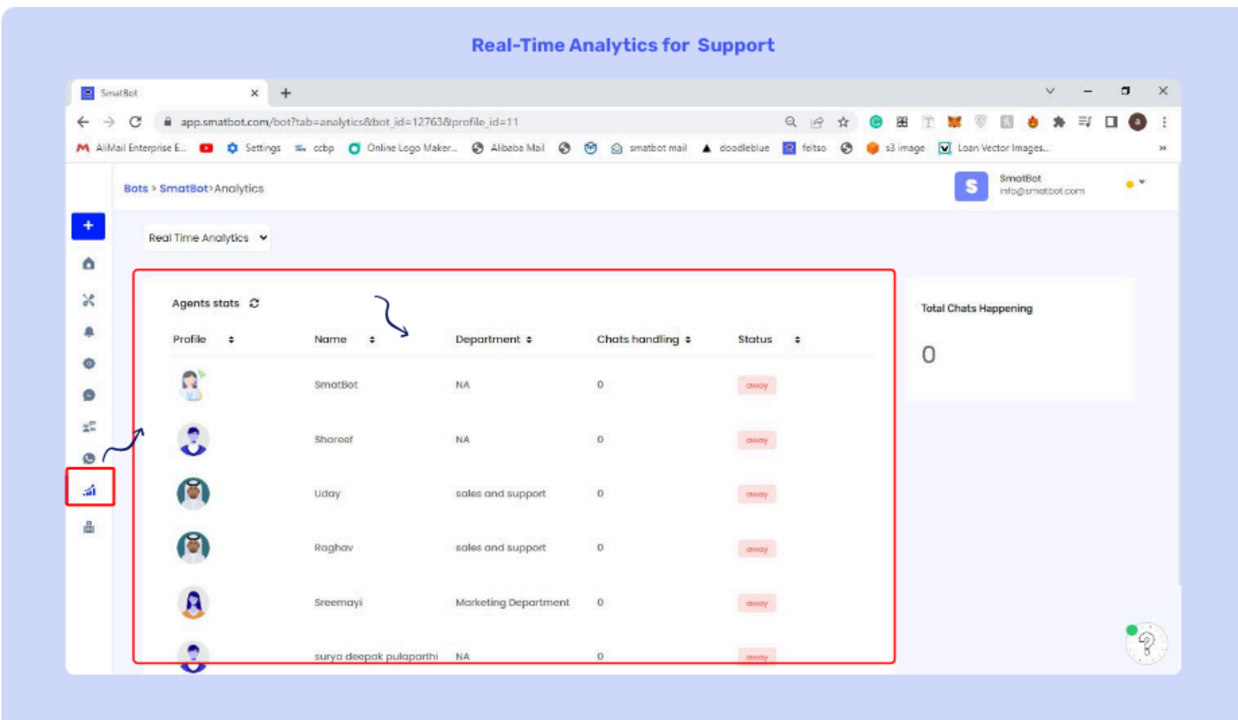
- **Live Chat Analytics for Lead Generation**
- * ADD IMAGE



- Bot Sessions: Total number of unique chatbot interactions

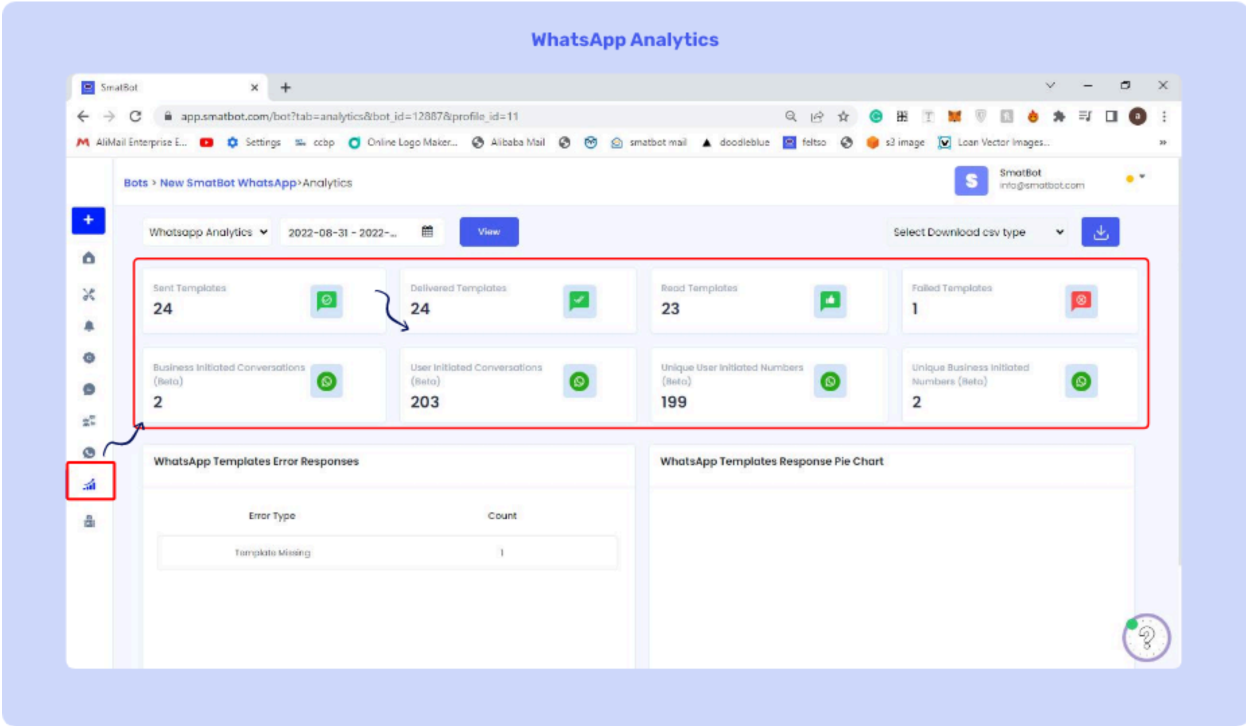
- Live Chat Sessions: Total number of unique live chat interactions
- Resolved Chats: Total number of chats marked resolved.
- First Response Time: Average time taken to respond to a user
- Customer Satisfaction Rate: Satisfaction rate of customers with respect to the final feedback given.
- Bot To Live Chat Rate: Percentage of live chat sessions with respect to bot sessions.
- Closed Chats: Total number of chats that are marked as closed.
- Chats Attended: Total number of chats attended by agent(s)
- Missed Chats: Total number of chats that are not attended by agent(s)
- Abandoned Chats: Total number of chats abandoned by the user and agents.

- **Real-Time Analytics for Support**
- * ADD IMAGE



- The Real Time Analytics provides all the information about the live agents, including the number of agents, their departments, the number of chats handled, and the status of the agents when they are online or away.

WhatsApp Analytics



AI Chatbots

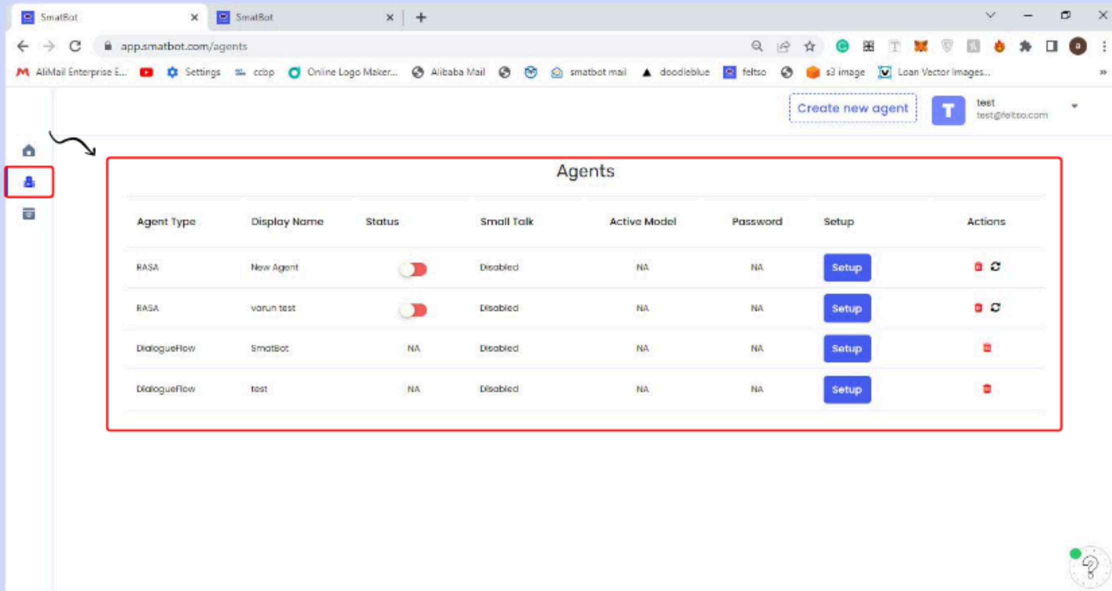
Add AI Capabilities to your bots to make them smart & easily adaptable in all situations. For custom developments, please contact us at support@smatbot.com.

1. Creating an agent:

ii. * ADD IMAGE

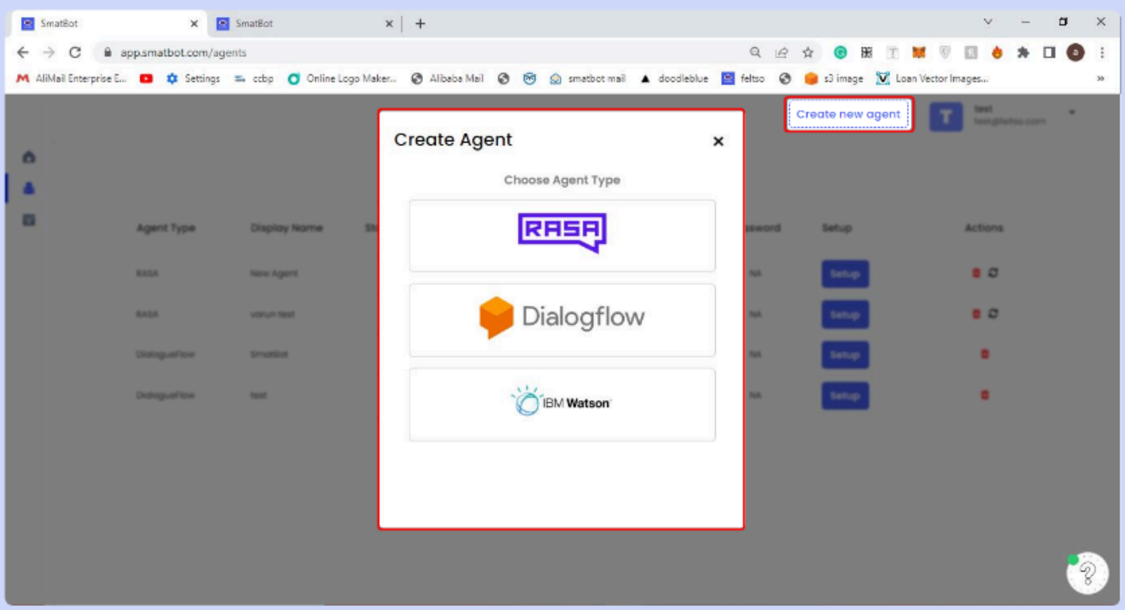
- Once you login to your SmatBot account, navigate to the left side panel and select **Agents**.

Click on Agent icon in the left side panel



- Click on the create agent button and select the **AI agent** you want to create.

Create New Agent

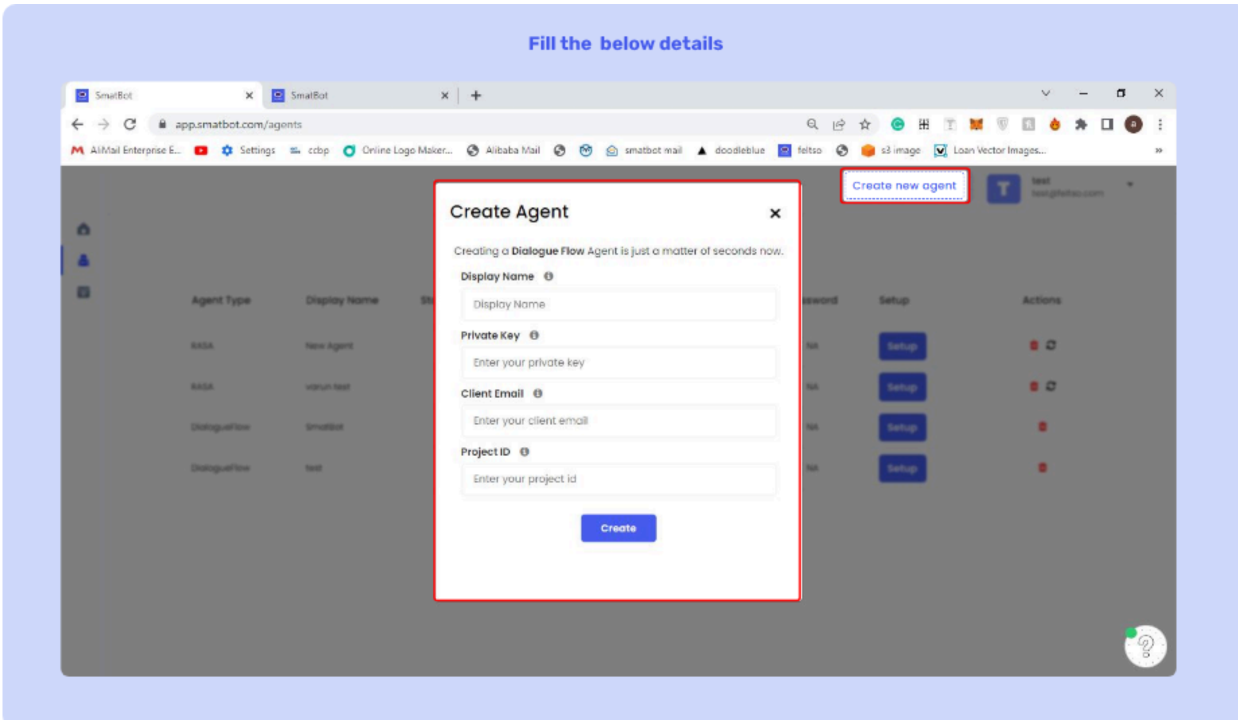


For DialogFlow:

Step 1

* ADD IMAGE

Give the Display name, Private key, Client email, and Project ID for the agent (You will find this in your Dialogflow account).



- For each Dialogflow agent that's been created, there will be a **project-id** assigned.
- Once you login to your Dialogflow account, go to Agents and click on the settings icon beside your agent. Next, click on the **Project ID link**.
- Click on the menu icon and click on the **create key**, after which a JSON file will be created from which you can extract the details of Private key, Client email, and Project ID.

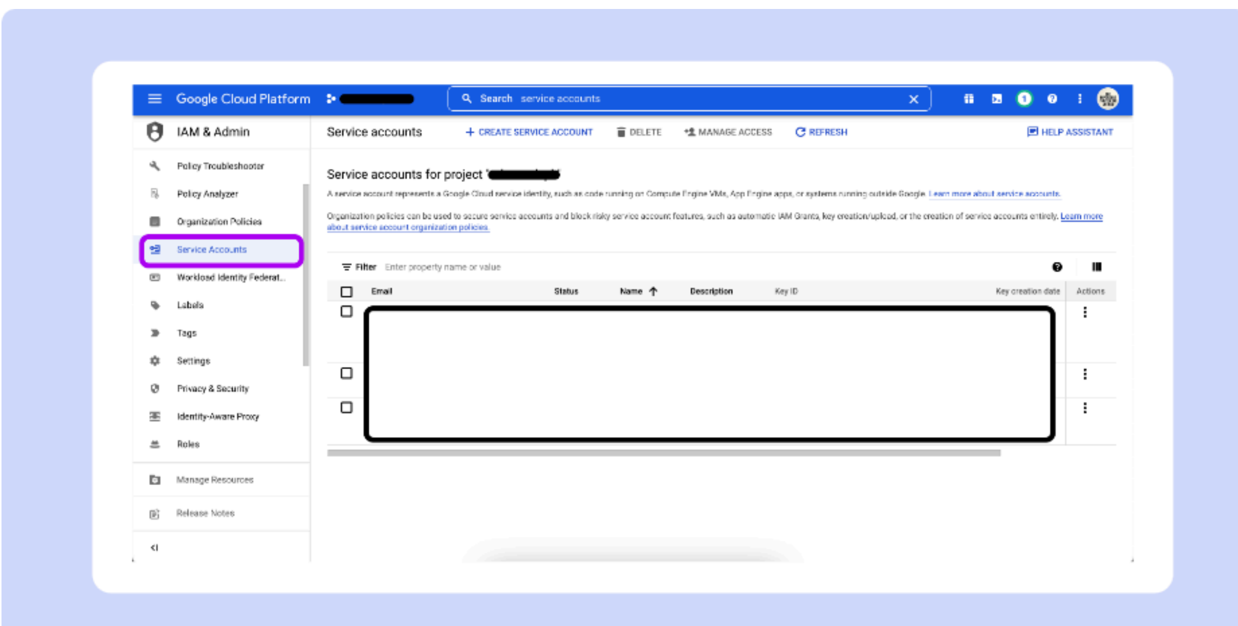
Step 2:

Create a service account.

- In the Cloud console, go to **IAM & Admin Section** and click on the **Create a service account**.
- In the Service account name field, enter a name. The Cloud console fills in the Service account ID field based on this name.
- In the Service account description field, enter a description.
- To provide access to your project, In the select a role list, select **owner**. Click on Create and continue.

  Note: The Role field affects which resources your service account can access in your project. You can revoke these roles or grant additional roles later. In production environments, do not grant the Owner, Editor, or Viewer roles. Instead, grant a predefined role or custom role that meets your needs.

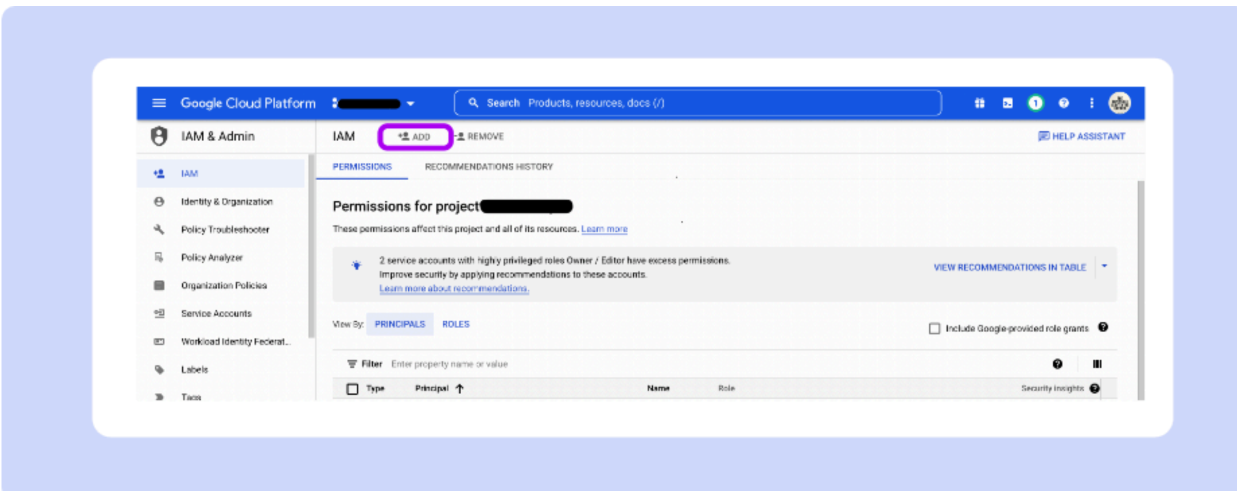
Step 3:



To map your Dialogflow intents and responses to SmatBot, please give the necessary permissions.

- In Google Cloud, go to the IAM Admin section and select **IAM**.
- Click on add beside IAM on the top of the section and use the email of the service account created earlier.
- Give Dialogflow admin permissions to the agent for it to list intents in SmatBot.

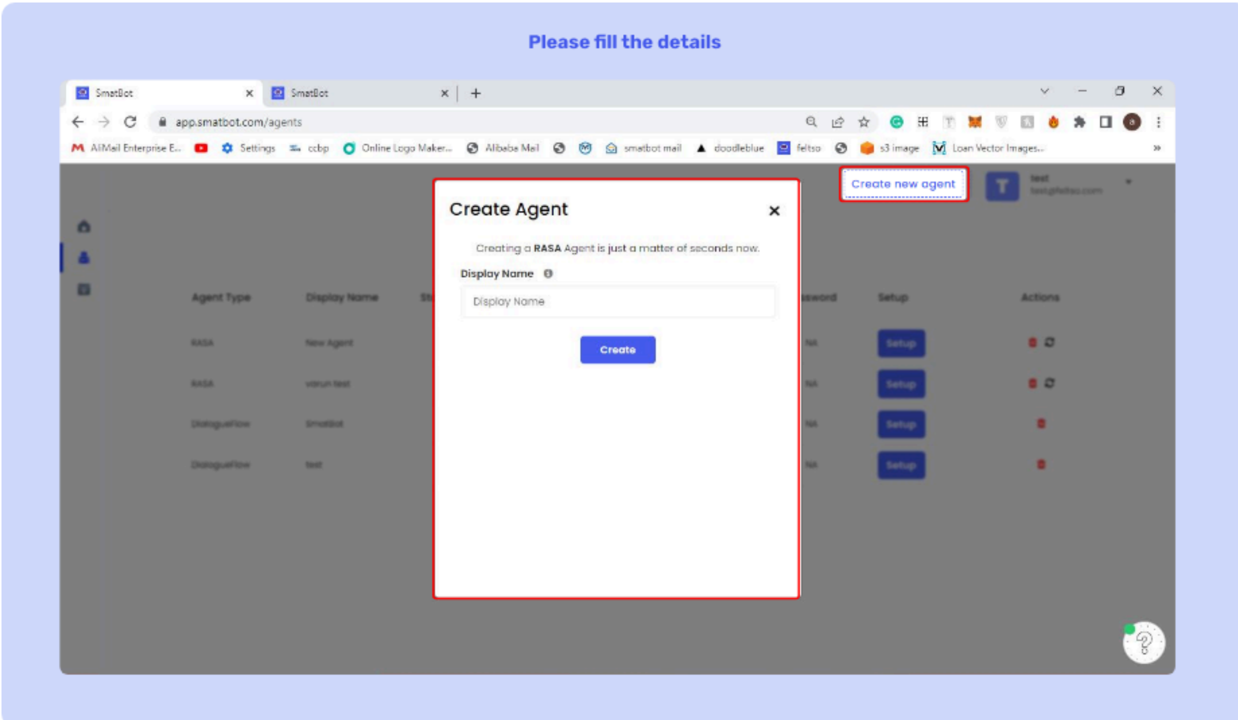
Step 4:



- Create a service account key
  - In the Cloud console, click the email address for the service account that you created
  - Click on Keys
  - Click on Add key and then click **Create on new key**. Click Create. A JSON key file is downloaded to your computer. Click on Close.

For RASA:

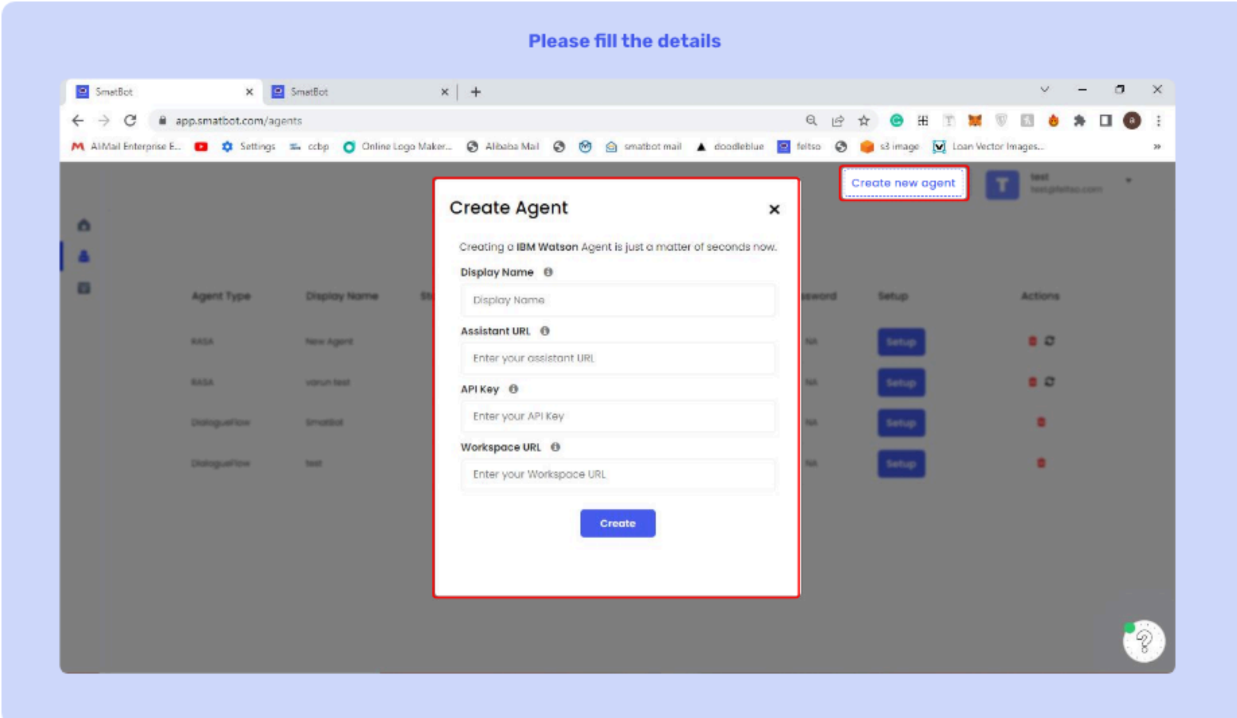
iii. * ADD IMAGE



Step 1. After selecting Rasa for creating an agent, you will be prompted to give the agent's name.

Step 2. Once you give the name, click on **create** and your Rasa agent will be created with small talk (to address casual conversations) in SmatBot.

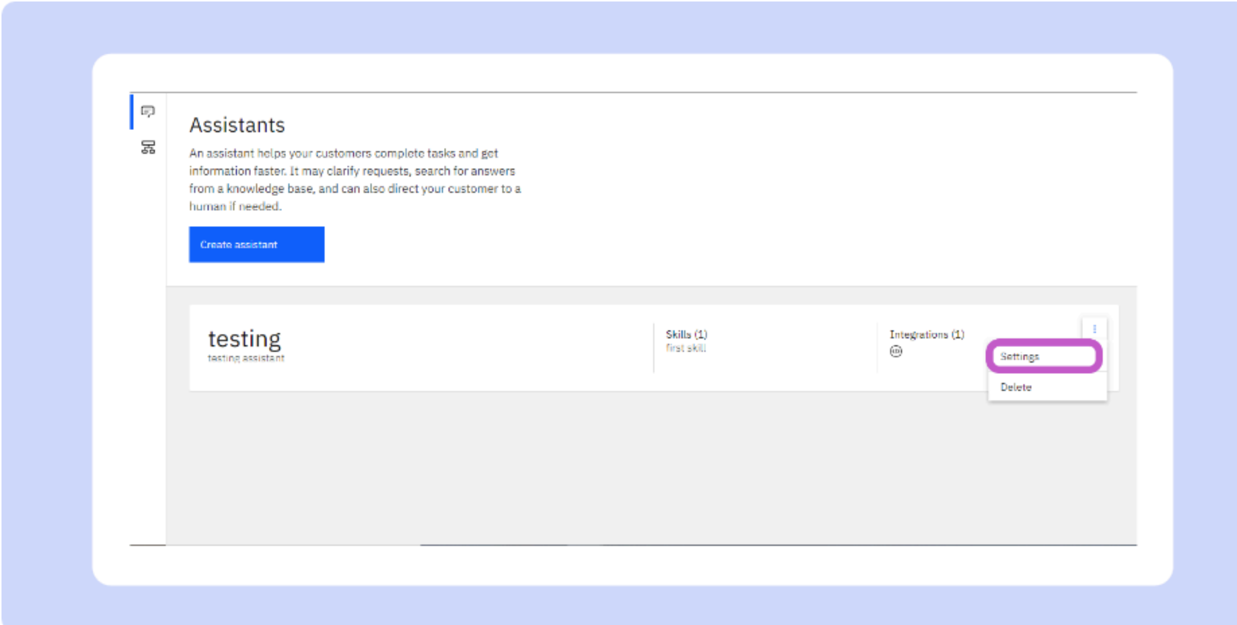
For IBM Watson :



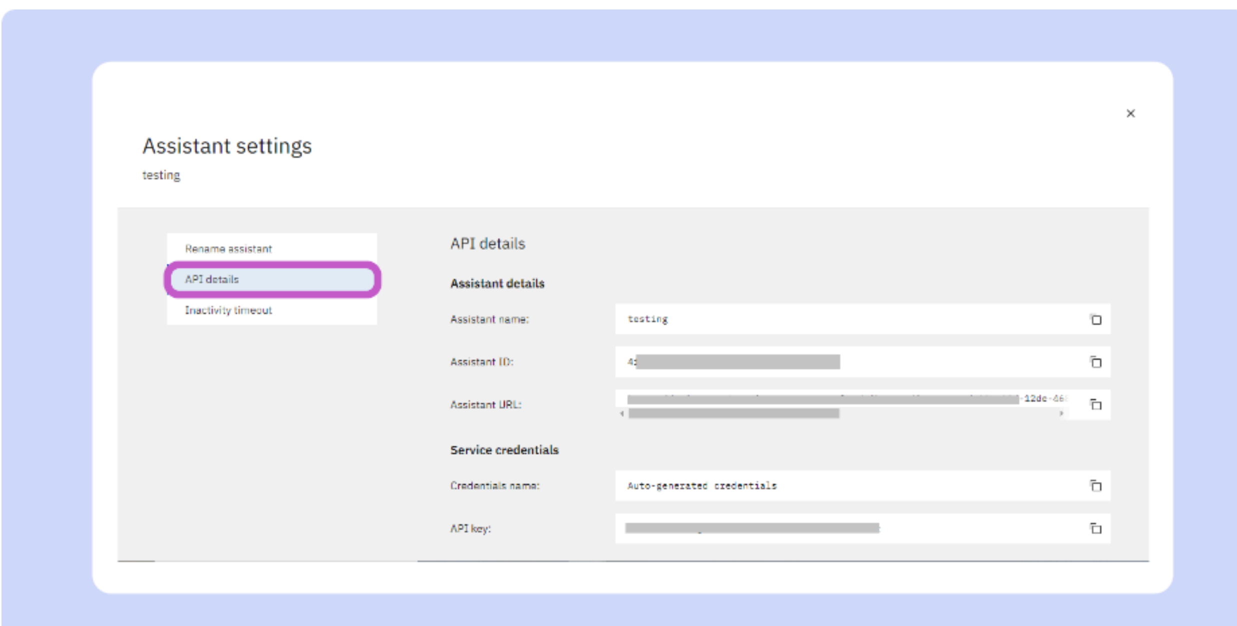
iv. * ADD IMAGE

Step 1. After you select IBM Watson for creating an agent, you will be prompted to give the Display name, Assistant URL, API Key, and Workspace URL for the agent (you will find this in your IBM Watson account).

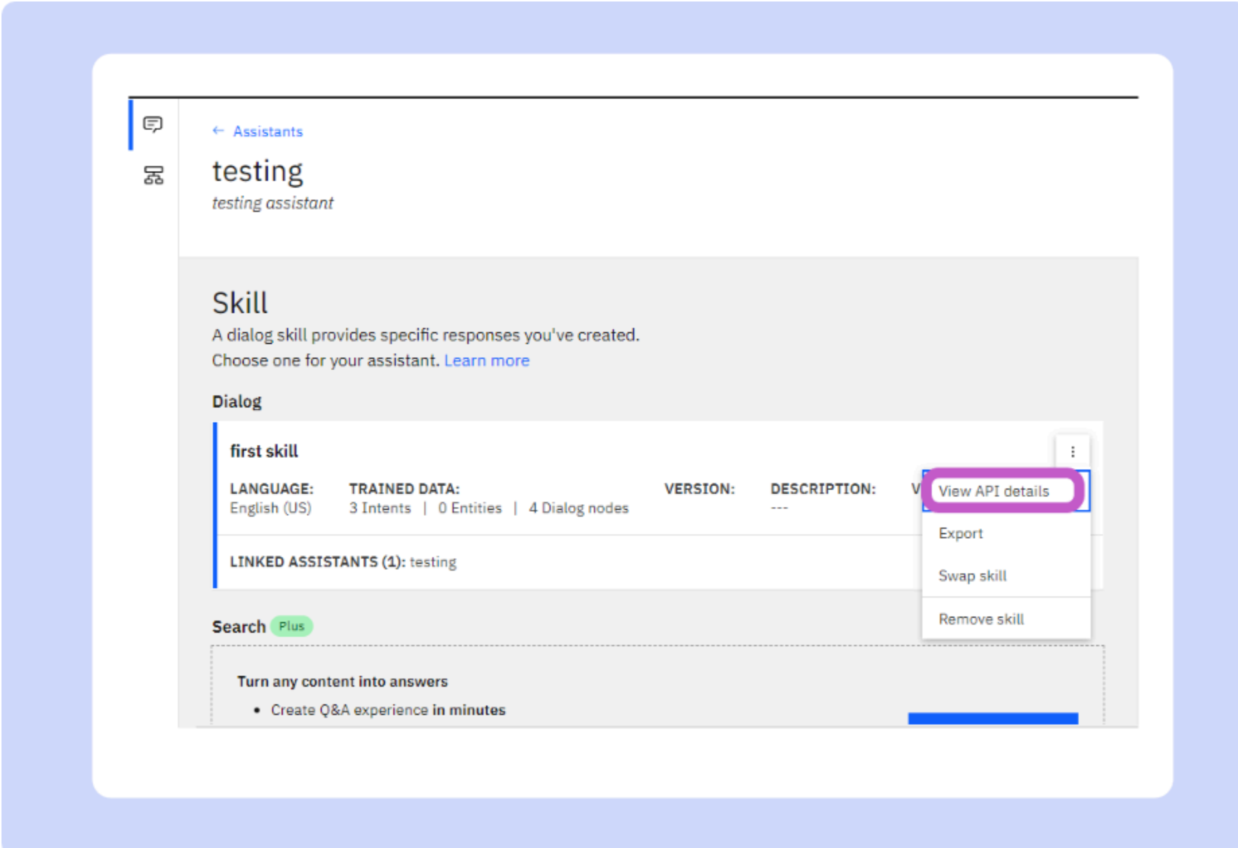
Step 2. Go to your assistant's home page to get the details mentioned above. Select the assistant you want to connect SmatBot with, and click on **settings**. Now navigate to the API details tab once settings are opened.



Step 3. Next, copy the assistant URL and API key from the API details page and paste them into the SmatBot's agent connection page in their respective fields.



Step 4. Next, click on your agent and select the skill that you want to map SmatBot with.

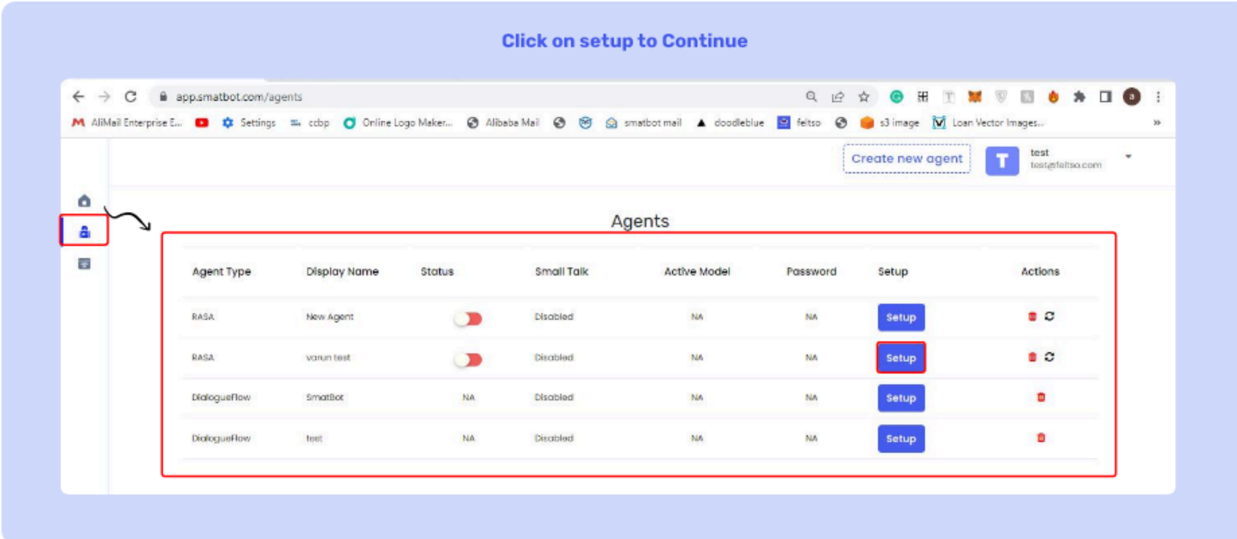


Step 5. Next, click on View API details and copy the Legacy v1 workspace URL value and paste it in the SmatBot agent connection page in its respective field (Mandatory if you want to map your Agent intents to SmatBot Flow)

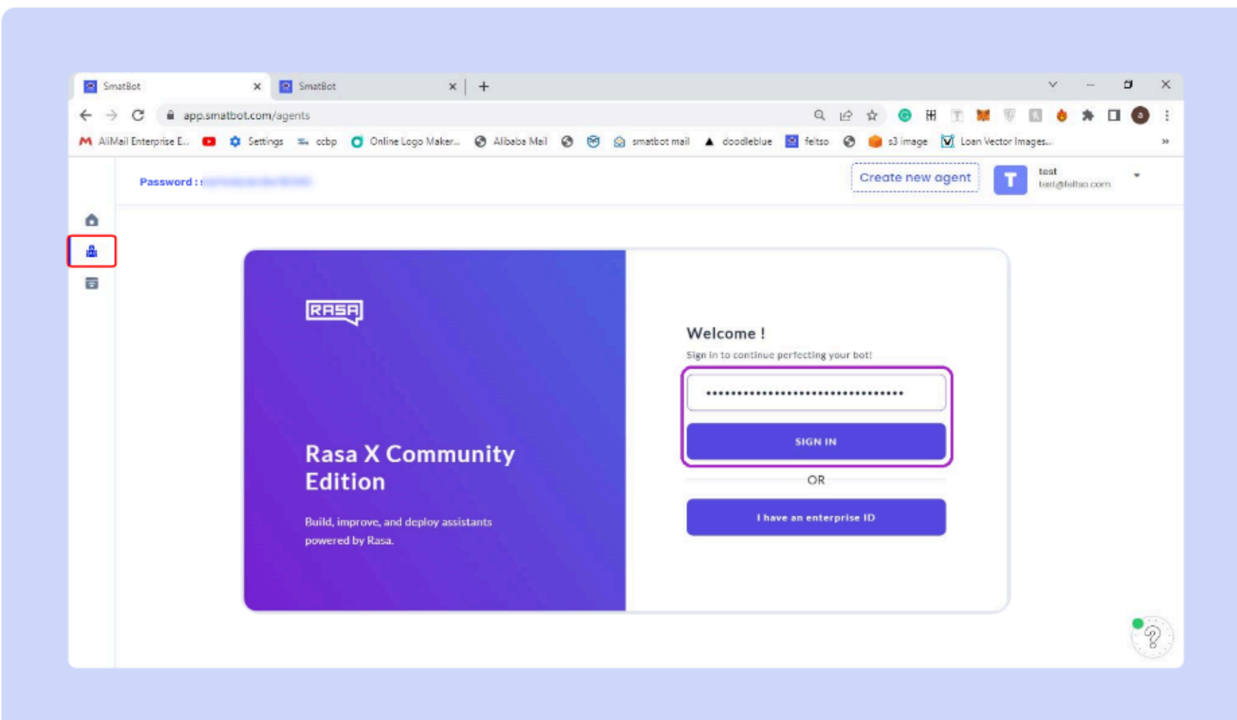
Step 6. Now, click on the submit button, and SmartBot will connect with your Watson agent.

Training Rasa Agent:

Step 1. To start training your Rasa agent, click on the **setup button** of the agent you want to train.



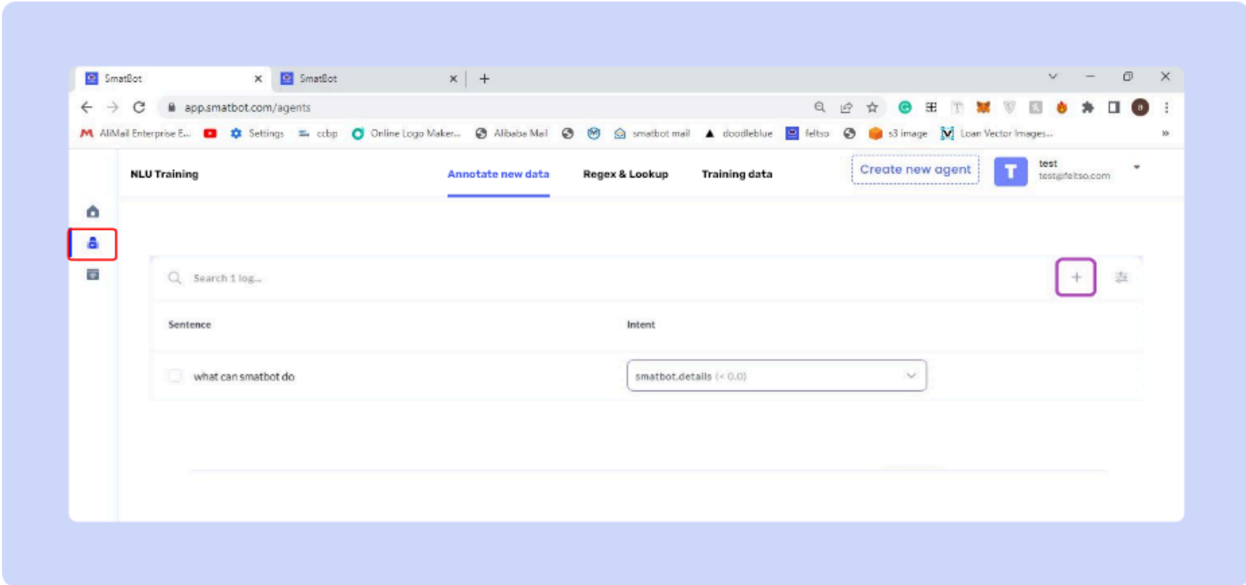
Step 2. Copy the password shown in the top left corner and log in to Rasa x.



Step 3:

Creating intent:

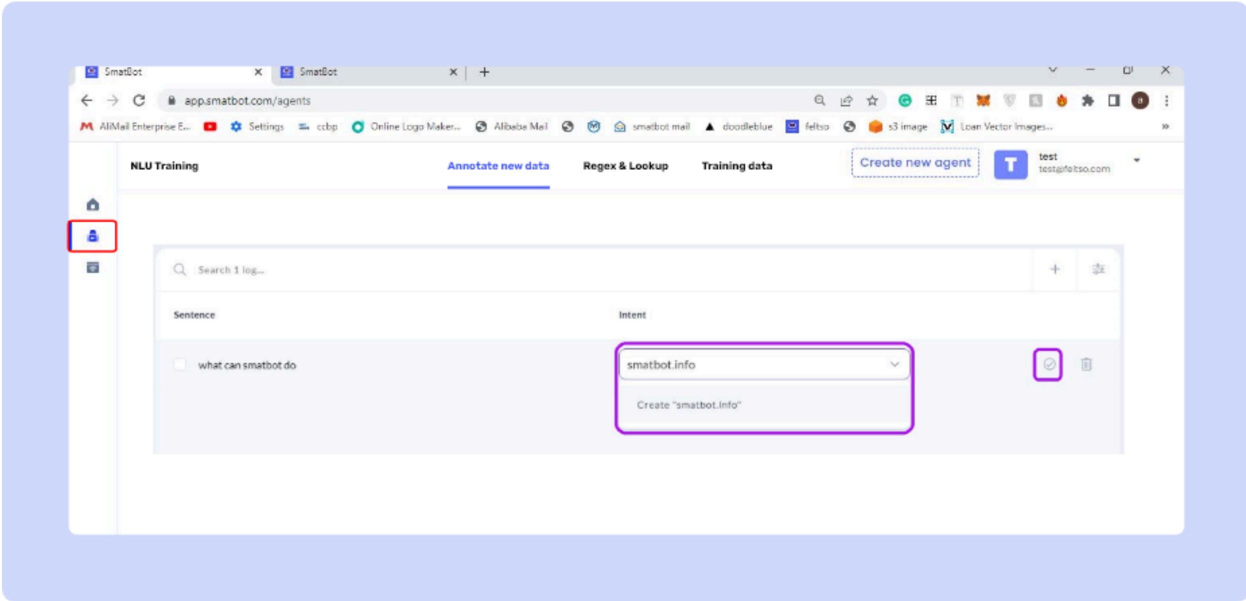
- **After you log in to Rasa x on the left side panel, below training, select NLU training and**



click the + icon in Annotate new data.

- Select any user query and click Enter.
- In the text box, type in the new intent name and click on **create {intent name}** in the dropdown and mark it as correct.

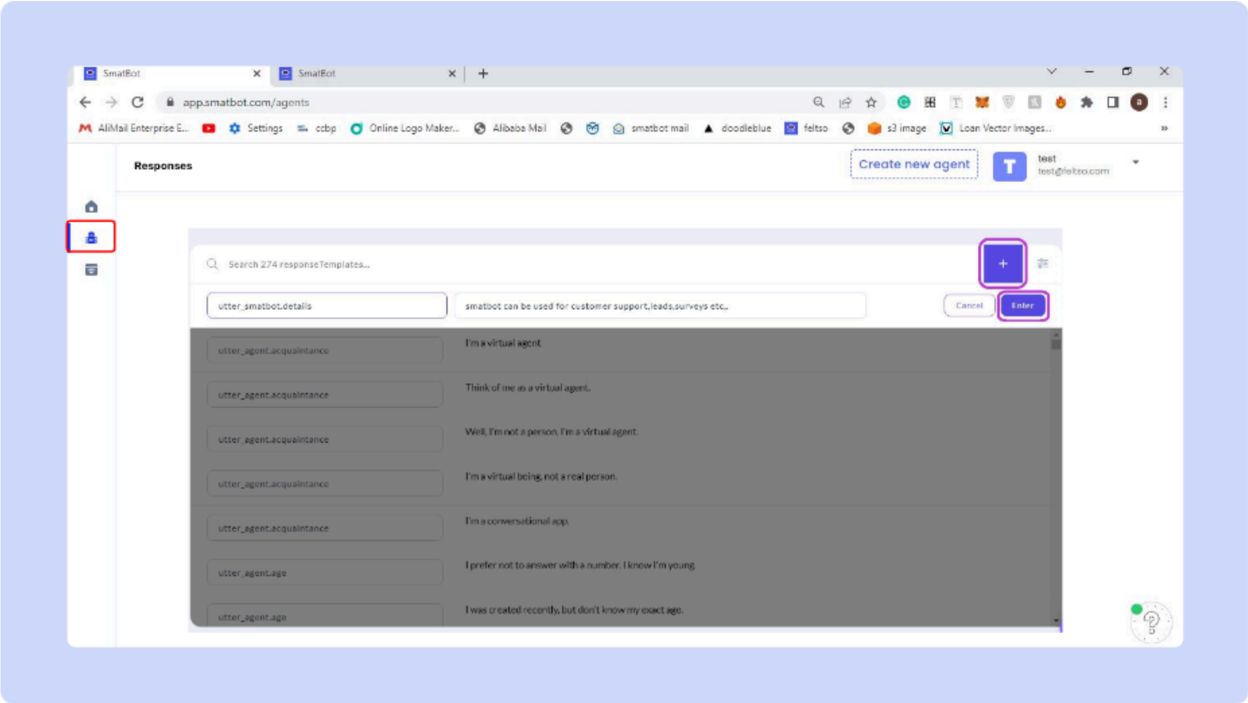
  Note: We suggest following this naming convention while choosing the intent name: Product/service name.intent, e.g. SmatBot.pricing' where SmatBot is the product/service name and pricing is the intent.



Step 4:

Adding responses:

- Once you create a new intent, head over to responses, and click the + button.

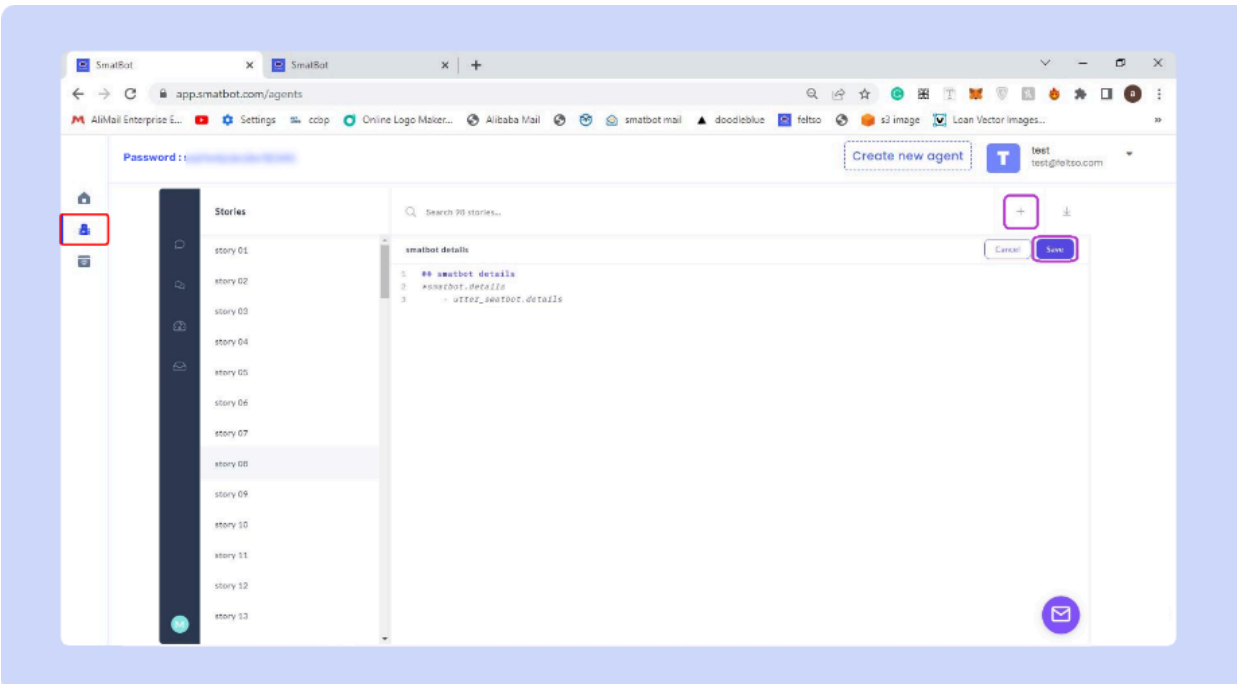


- In the first text field, give the utterance name, e.g., utter_SmatBot.pricing and corresponding response in the second text field.

Step 5:

Creating a story:

- Now, let's map intent with a response. Head over to stories and click on the + button.



- Use the syntax below for creating a story and click on Save.# {story name}
  - * "intent name"
  - - "utterance name"

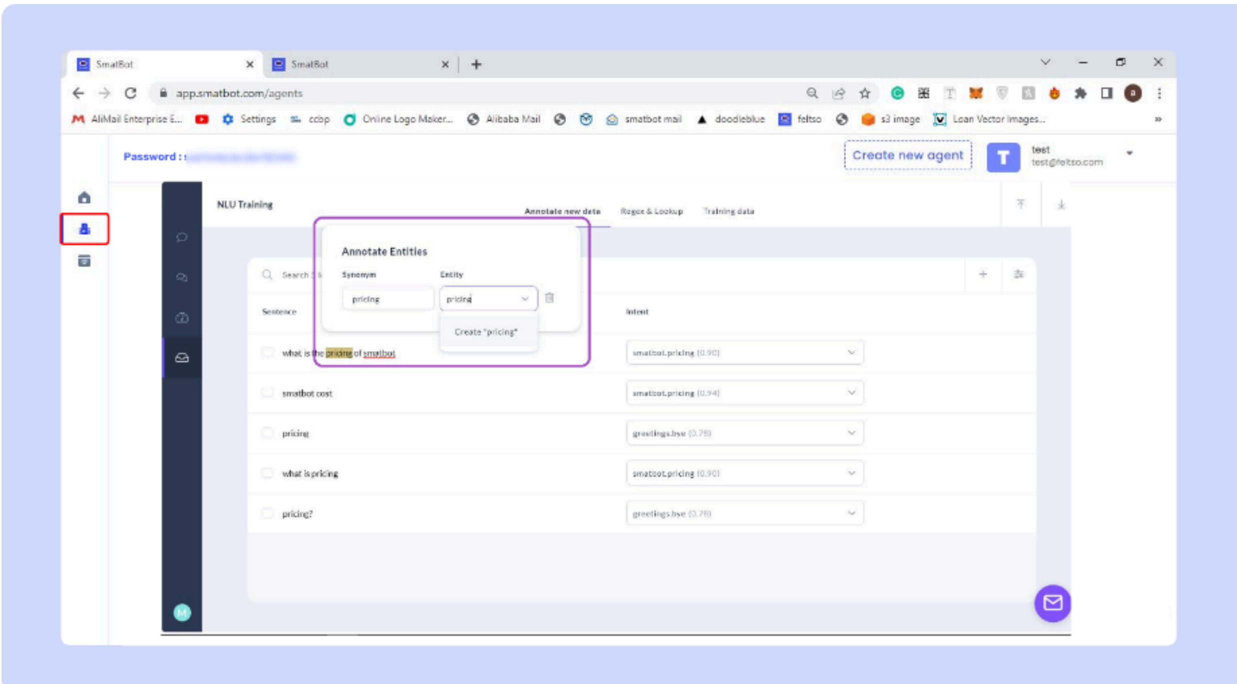
Step 6:

Adding entities:

- To add entities, you need to double-click on the word in the training data query you added.
- In the dialogue box, type in the entity name and click create{entity name} in the dropdown.

Example:

- **Let's say, for example; you need to train your agent to answer pricing-related questions, users can ask many different synonyms like cost, expense, etc.**

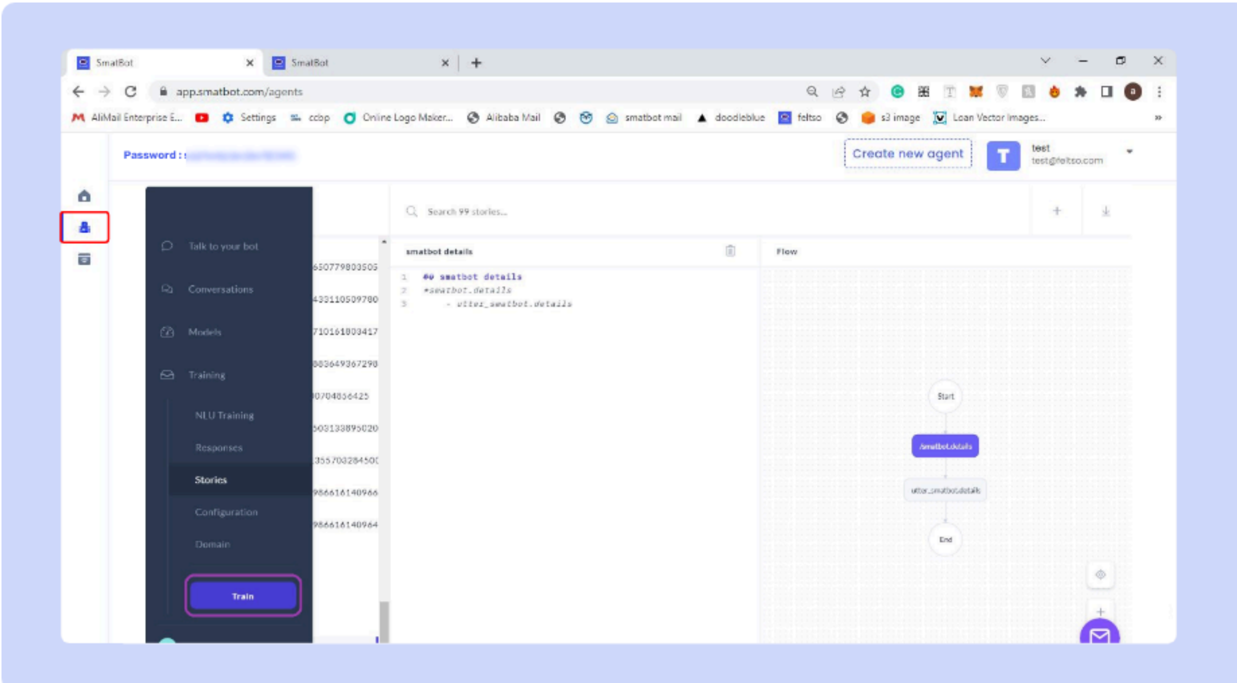


- First, create an entity named pricing, and you can add cost, expenses in the training data and mark them as synonyms for your entity pricing.
- You should create at least two or more samples for intent mapping, two or more responses for an utterance, two or more samples for an entity mapping.
- You can create multiple intents, corresponding responses, stories, and entities. It makes the bot more diverse if there are multiple FAQ's.

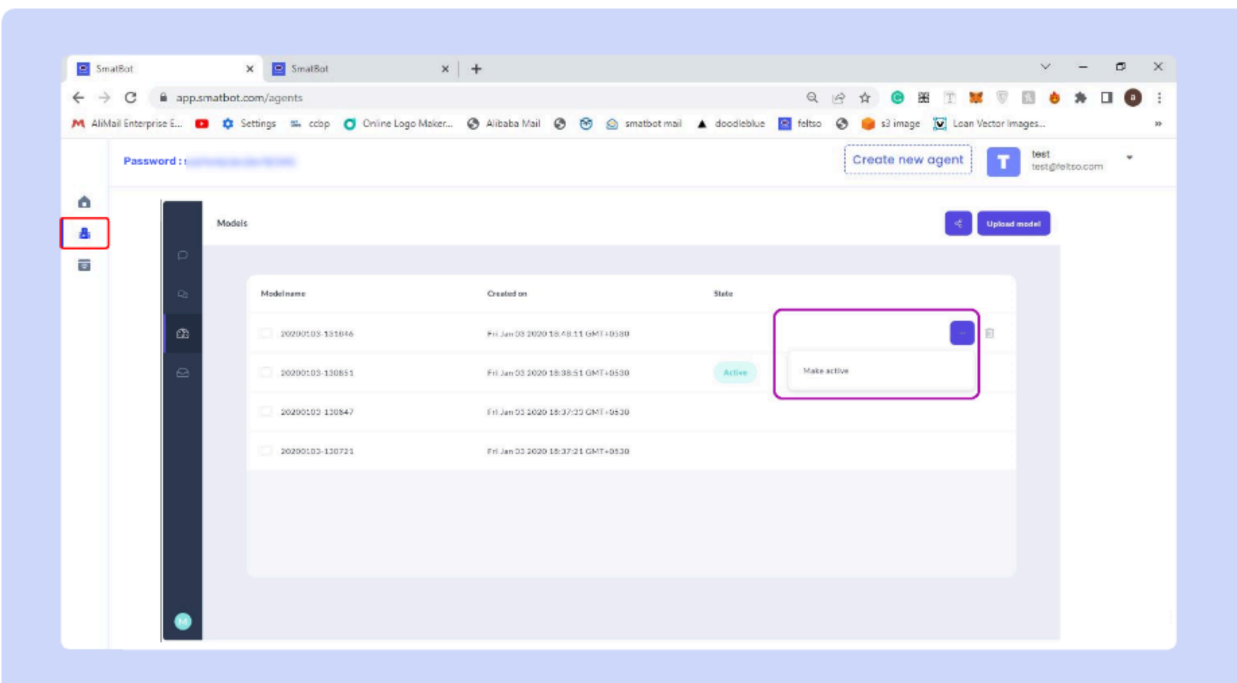
Step 7:

Training and Activating Model (Mandatory after any changes done to the agent) :

- Once you add all the intents, responses, stories, and entities in your agent, click on **Train.**



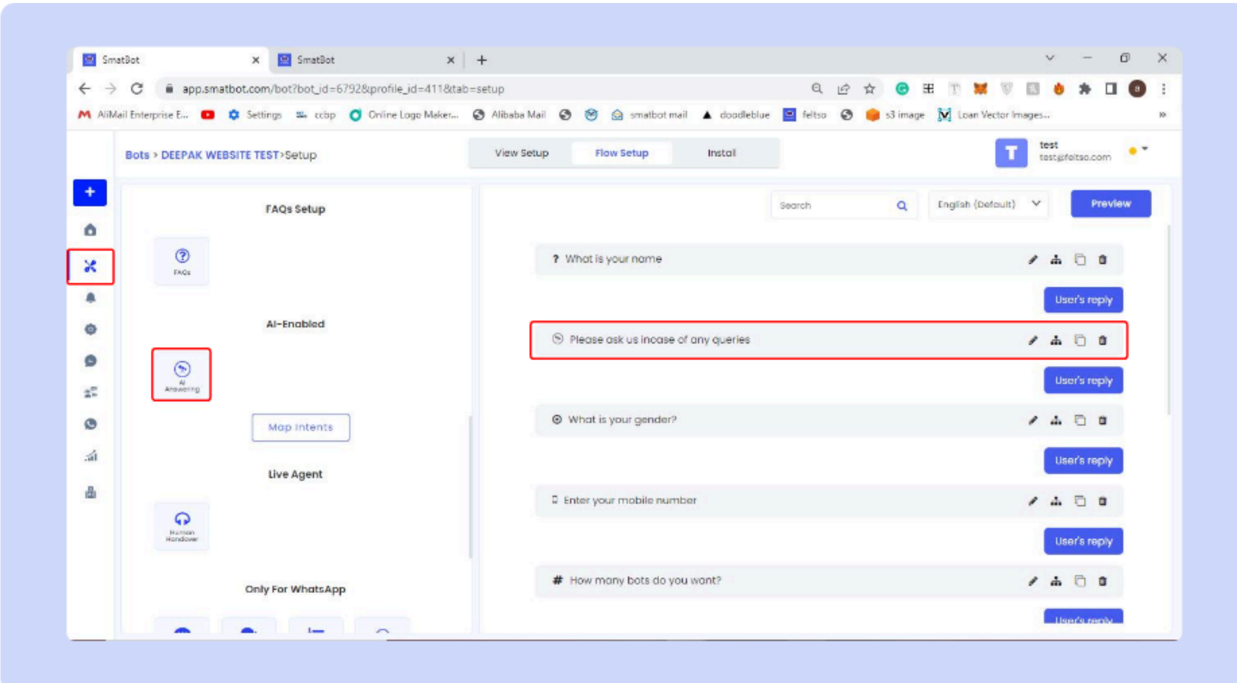
- **After completing training, head over to the models and activate the latest trained model by clicking on the three dots shown in the image below.**



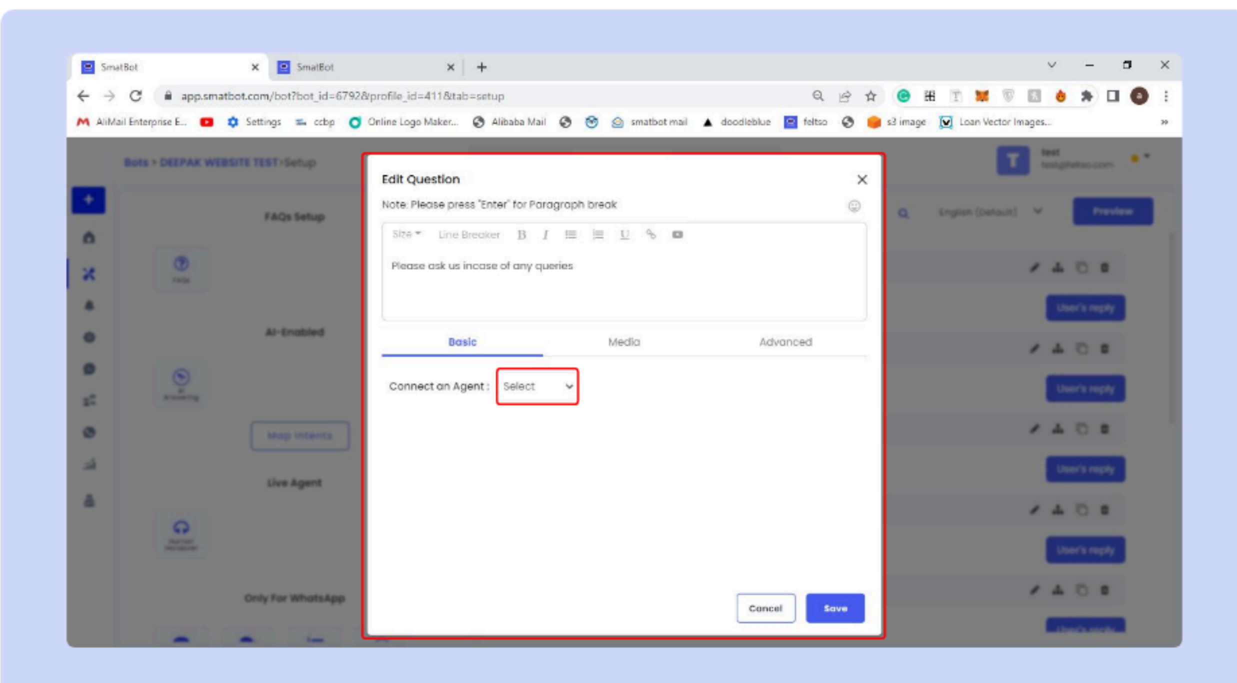
Step 8:

Connecting your agent to SmatBot:

- Once you finish setting up your Agent, head over to the flow setup part of the bot that you want to connect your agent with.



- From the left side, drag and drop the AI Answering question type into your chatbot flow and click on the edit option.
- Select your agent from the dropdown below, click on Connect an agent and click on Save.



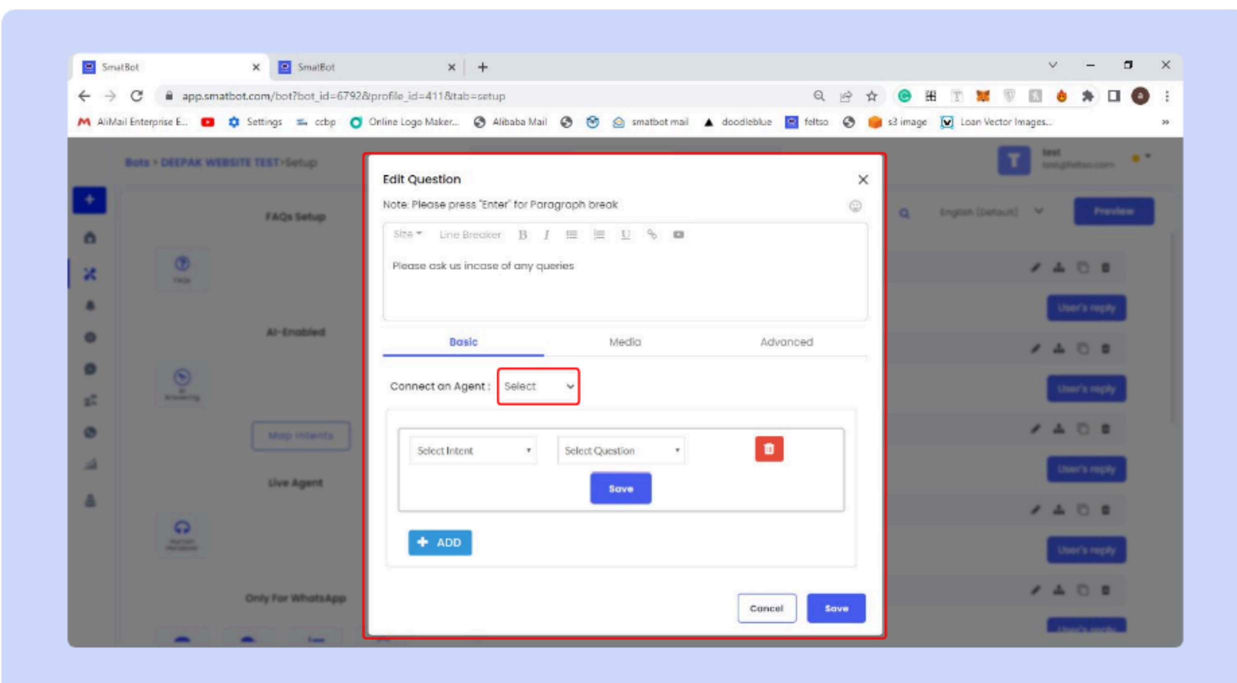
-

SmatBot is now connected to your AI agent and ready to answer user queries!

Step 9:

Mapping your intents with SmatBot Flow:

- You can jump to a specific question in the SmatBot flow upon detection of any intent. This is used to achieve goal-based intents. E.g. For booking a hotel intent, you can map to the flow where SmatBot asks for details to book the hotel.
- Step 1:
    - For mapping SmatBot with your intents click on the Map intents button on the left side panel in the flow setup part of the chatbot.
- Step 2.
    - Now, choose an agent from the dropdown below. Connect an agent with which you want to map your chatbot.
- Step 3:
    - Once you select an agent, mapping options will be displayed below.
- Step 4:
    - Select the intent and the question jump from the dropdown as is shown below and click on Save.



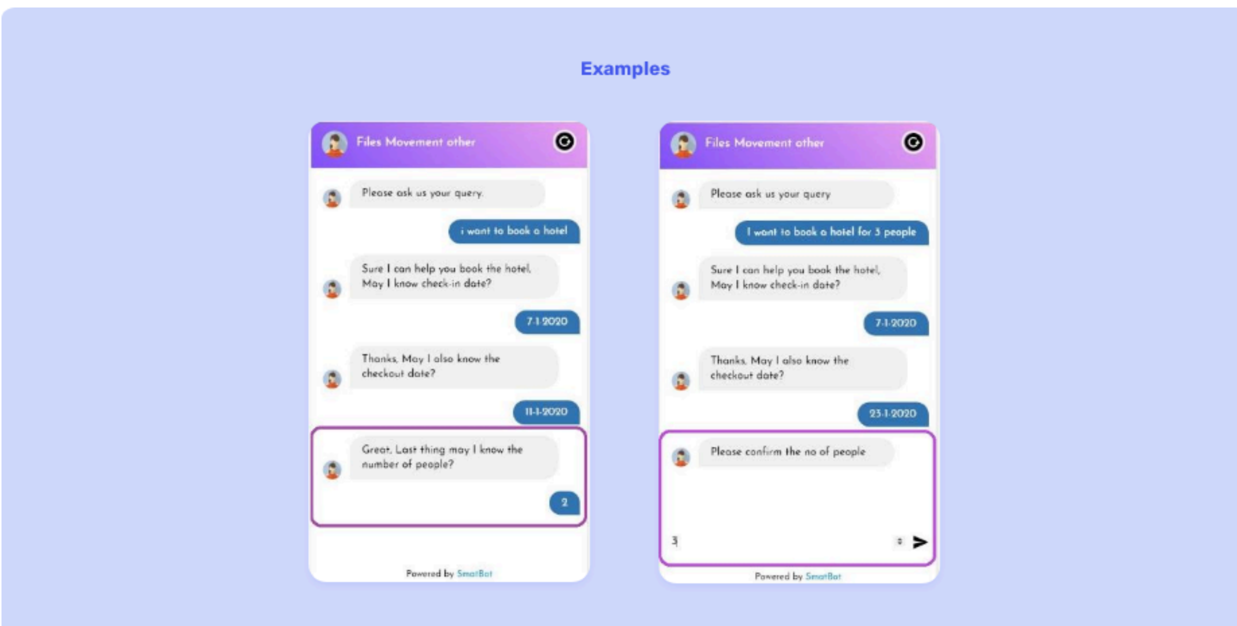
- Step 5:
    - To Set up a new jump with a new intent, click on the + button, and follow step 4.
- Step 6:

- Choose an agent from the dropdown below. Connect an agent you want to map your chatbot.

Step 10:

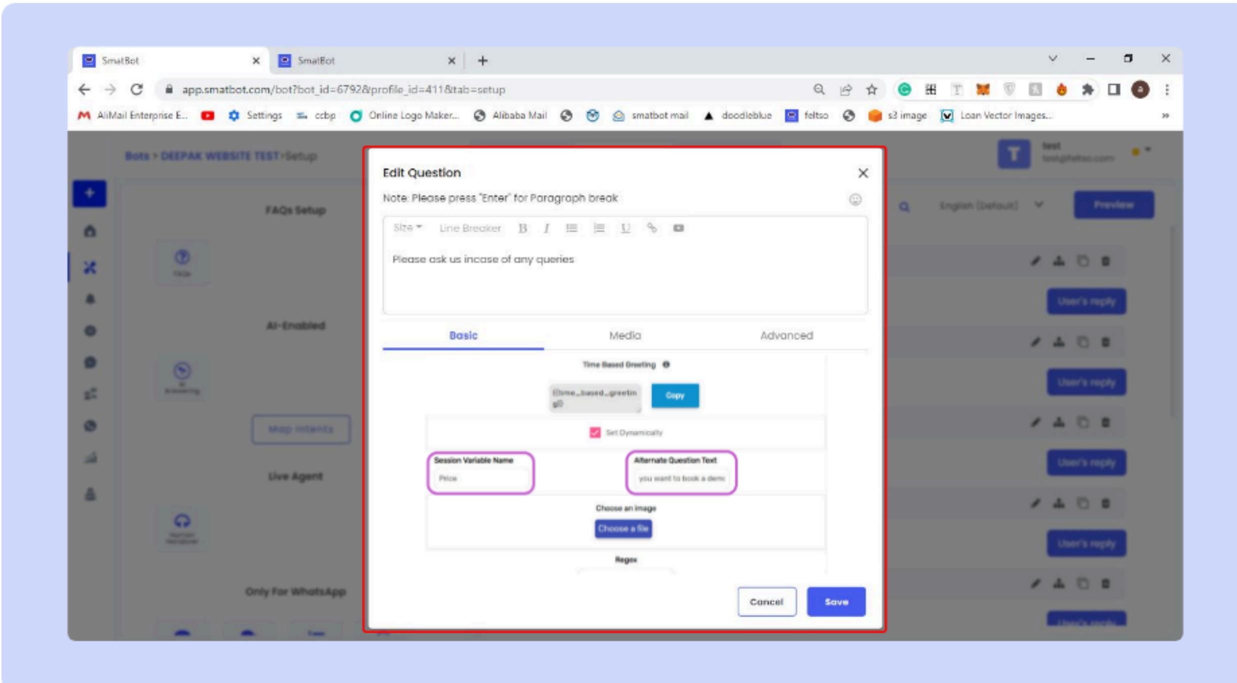
Mapping entities to the SmatBot questions:

- This is also used for goal-based intent. Let's say you want to book a hotel, we need 'check-in date', 'checkout date', 'number of people'. We first create a structured flow in SmatBot
    - A) Sure, I can help you book the hotel, May I know the check-in date? B) Thanks, May I also know the checkout date? C) Great, may I know the number of people?
- The bot can also accept the user query and process using NLP and jump to the above flow A-C and achieve the goal.
- There are two kinds of user queries, one with just intent, the second with intent along with entities. For example:
    - Case 1: I want to book a hotel (just intent: Booking Hotel)
    - Case 2: I want to book a hotel for three people (intent:- Booking Hotel and Entity: {"people":3})



- In the first case, the bot just found the intent to start the booking flow from A and achieve the goal. It can be done by mapping intents to flow, as explained in the last section.
- In the second case, the bot found intent and entities to start from flow A, but instead of asking for details, it prefills the entity value in the text field and asks the user to confirm the details and achieve the goal. It can be done by editing each possible question in the flow by enabling set dynamically and giving the session

variable name which should be the same as entity name and Alternate Question Text which would be asked by the bot instead of the normal question if entity value is found.



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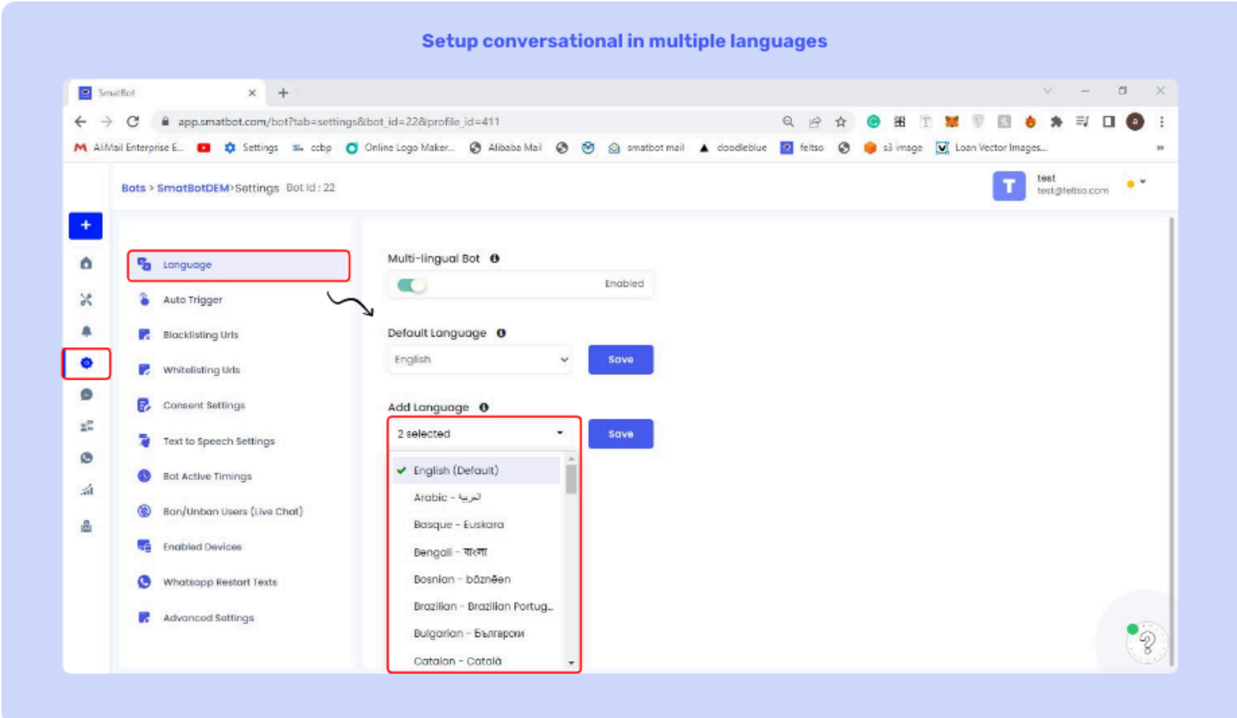
7. Settings (outer section)

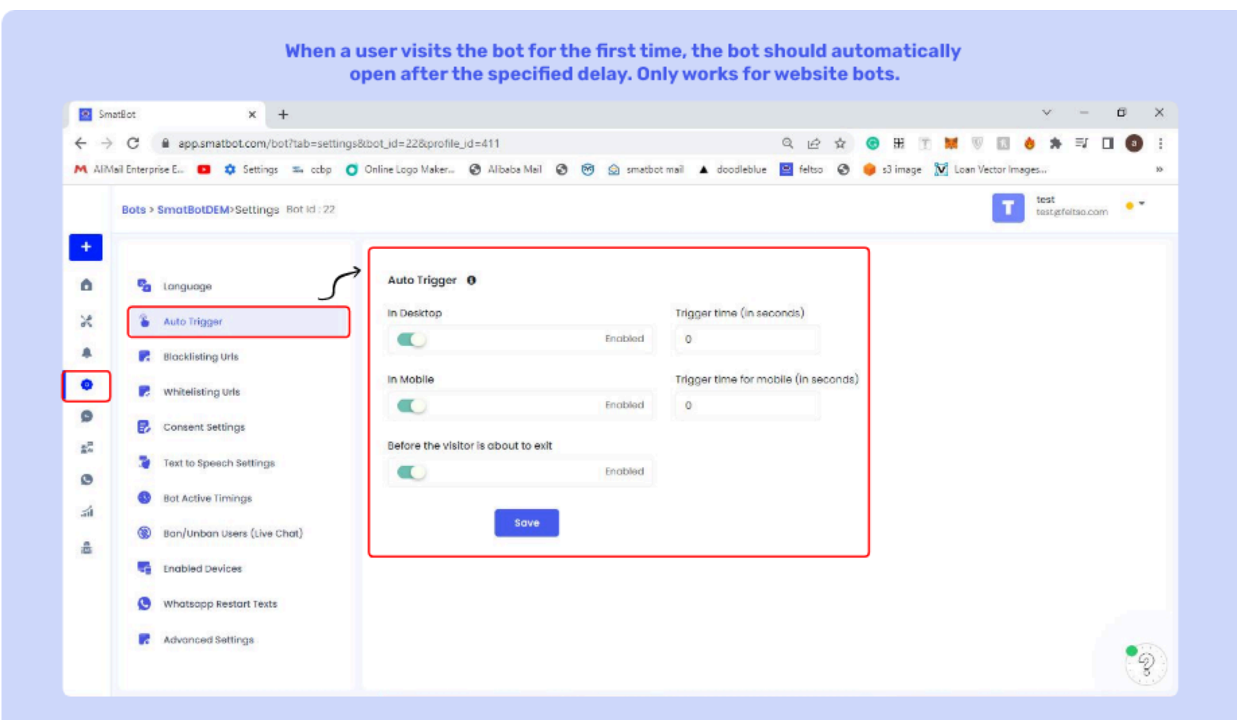
Use the settings section of our dashboard to customize the settings of your bot.

Basic Settings

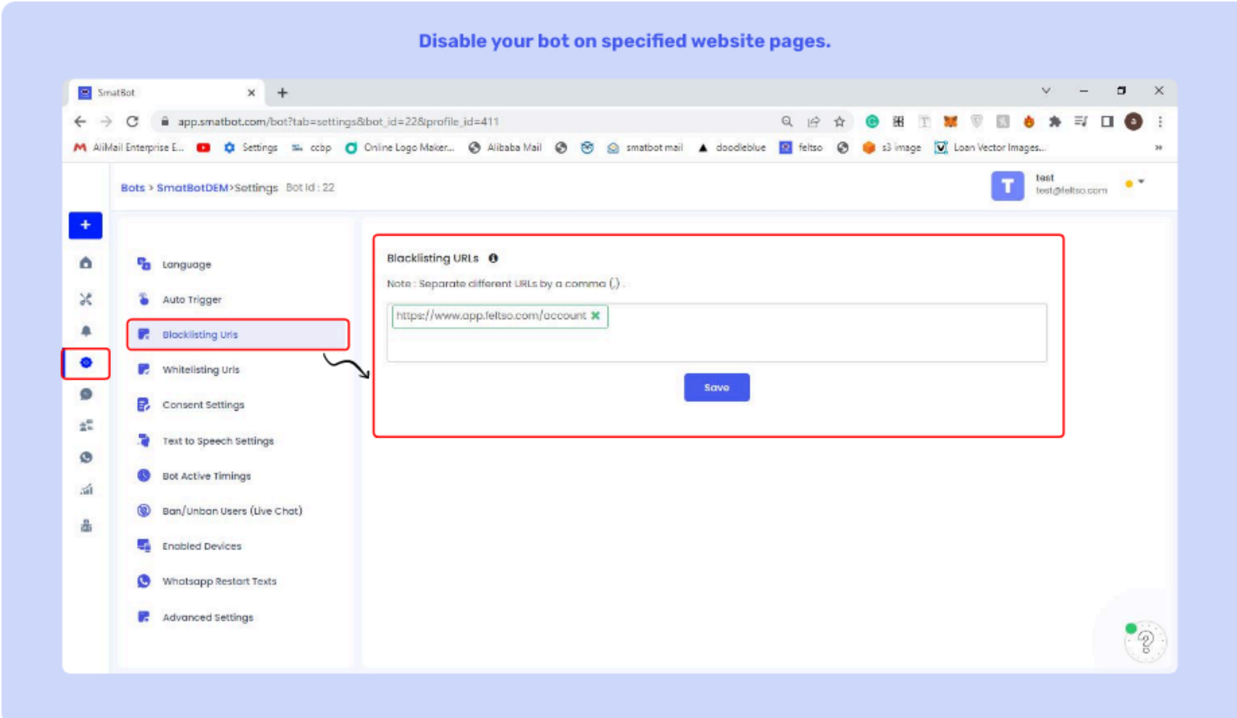
- You can enable or disable multilingual capabilities and choose the language preferences for your bot.



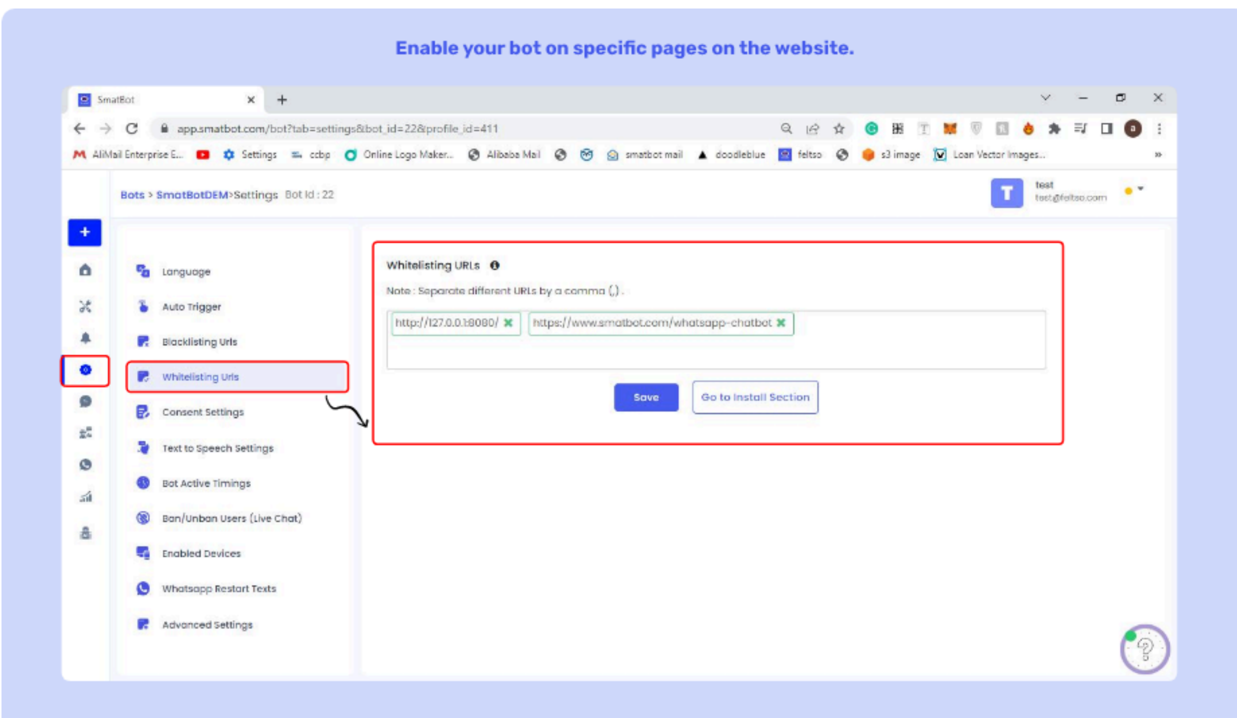
- Use Auto Triggers to make your bot appear or disappear automatically when a user visits or leaves your website.



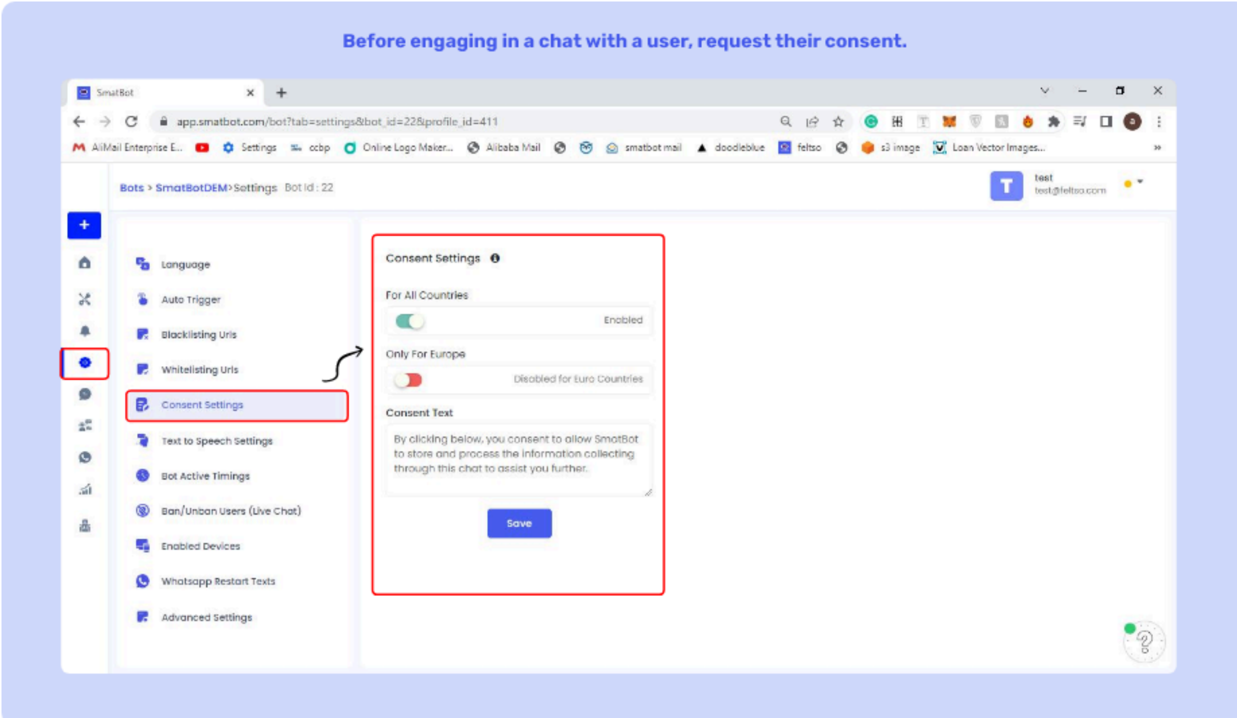
- To disable your bot on specific pages, use Blacklisting URLs.



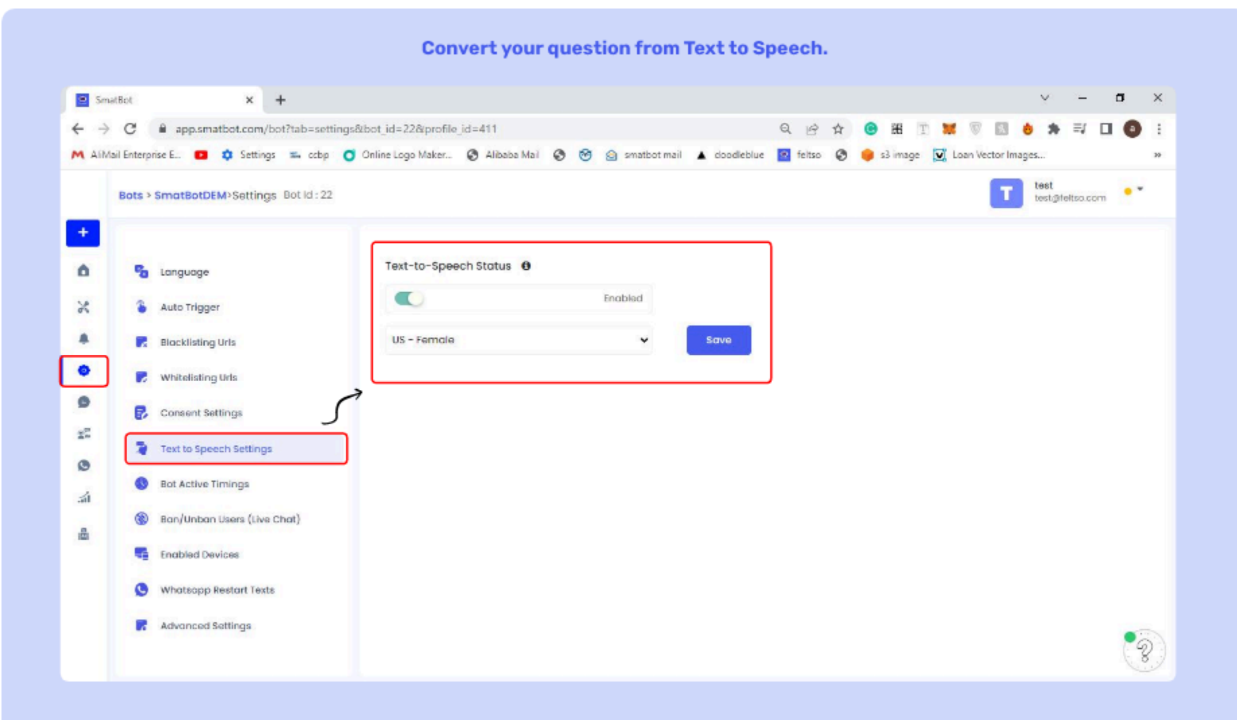
- To enable your bot on specific pages, use White listing URLs.



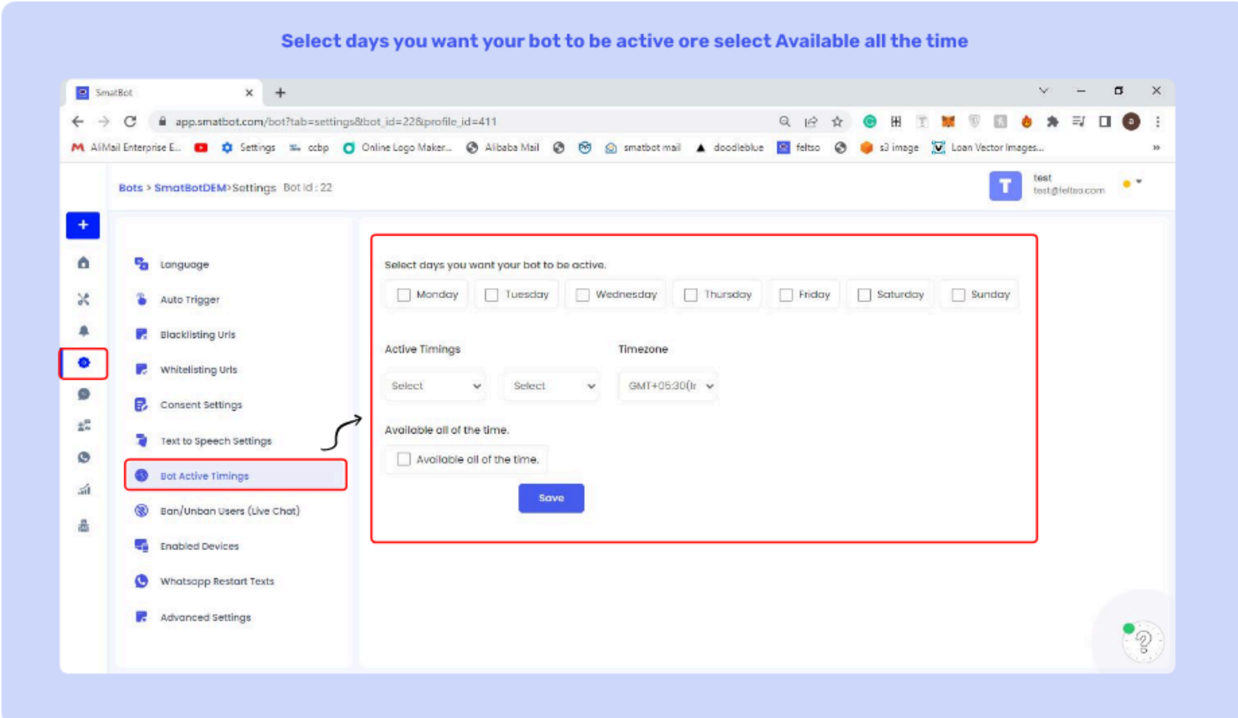
- You can ask for consent from the user before starting a conversation.



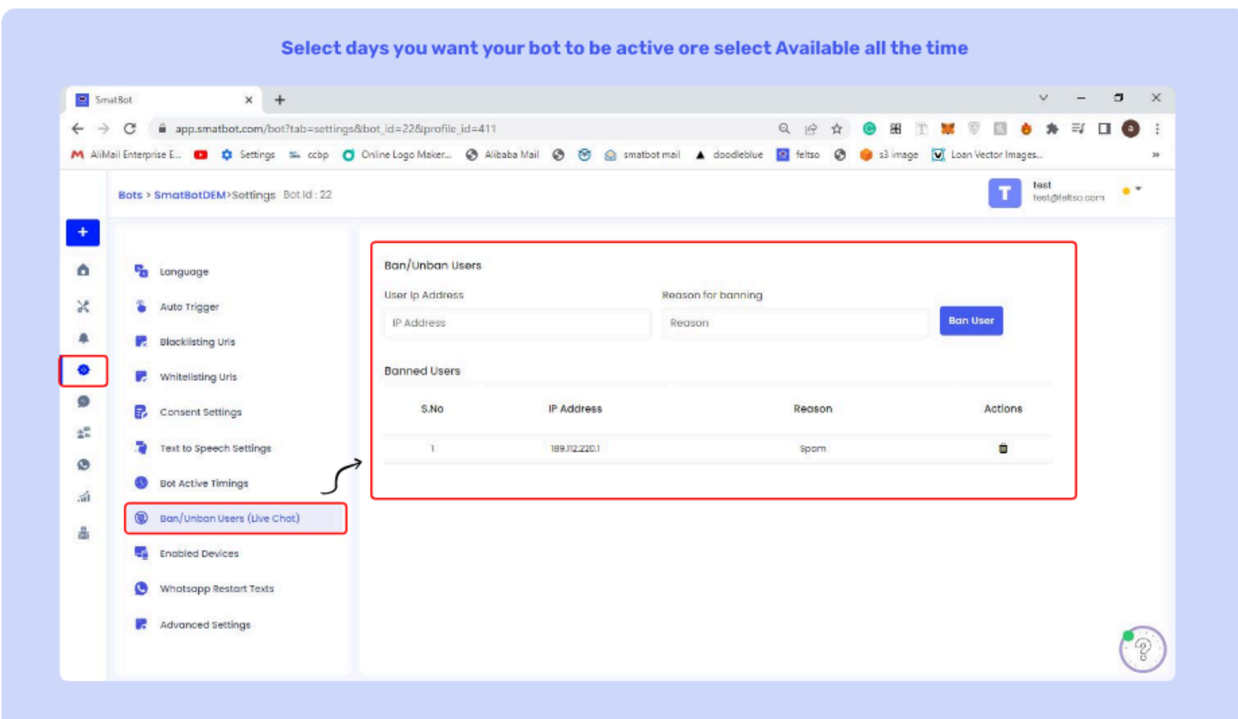
Users can convert text questions into speech by enabling Text-to-Speech in the settings.



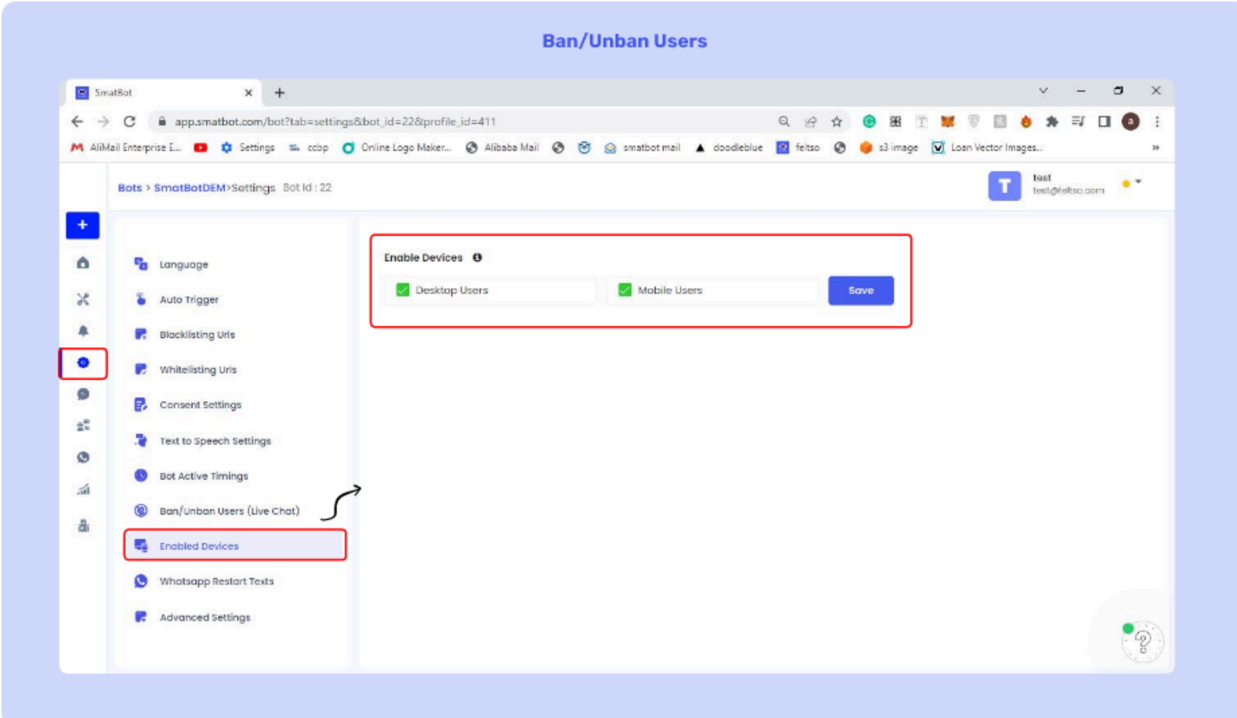
- Choose the days and times that your bot should be active by using the "Bot Active Timings" feature in the settings



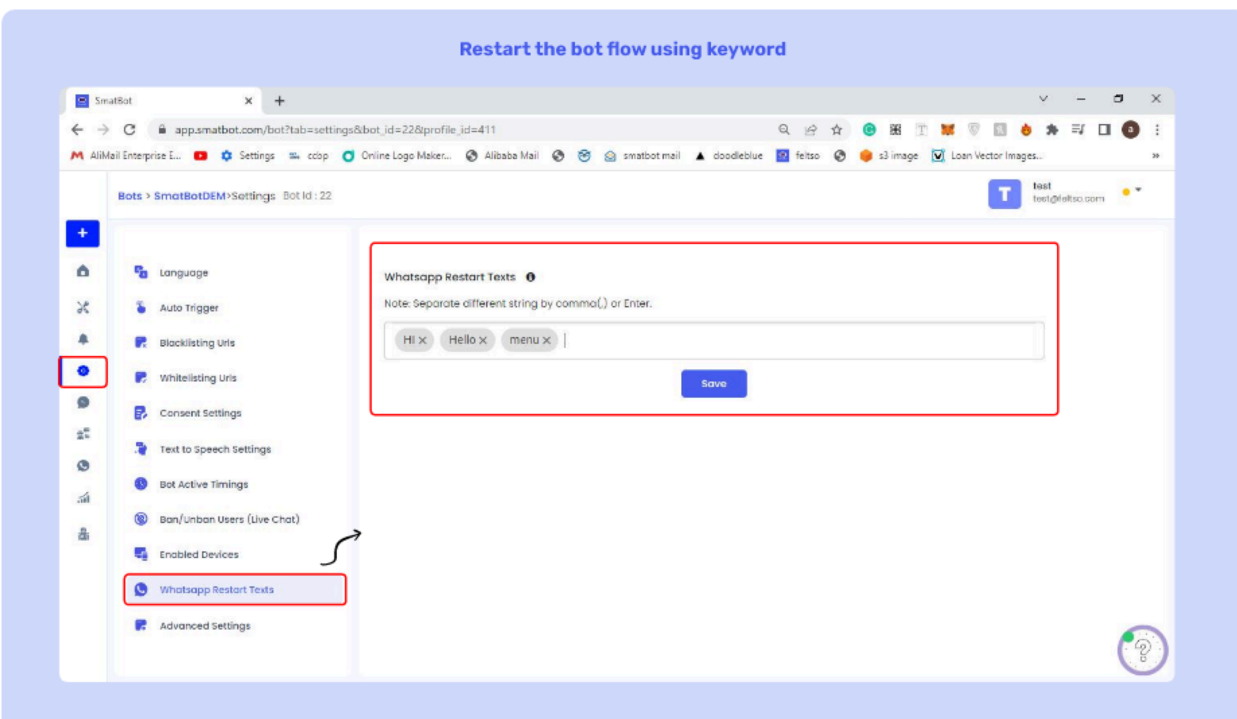
- Ban users by their IP address if they engage in any inappropriate behavior.



- Your bot can be enabled or disabled on a desktop or mobile device.

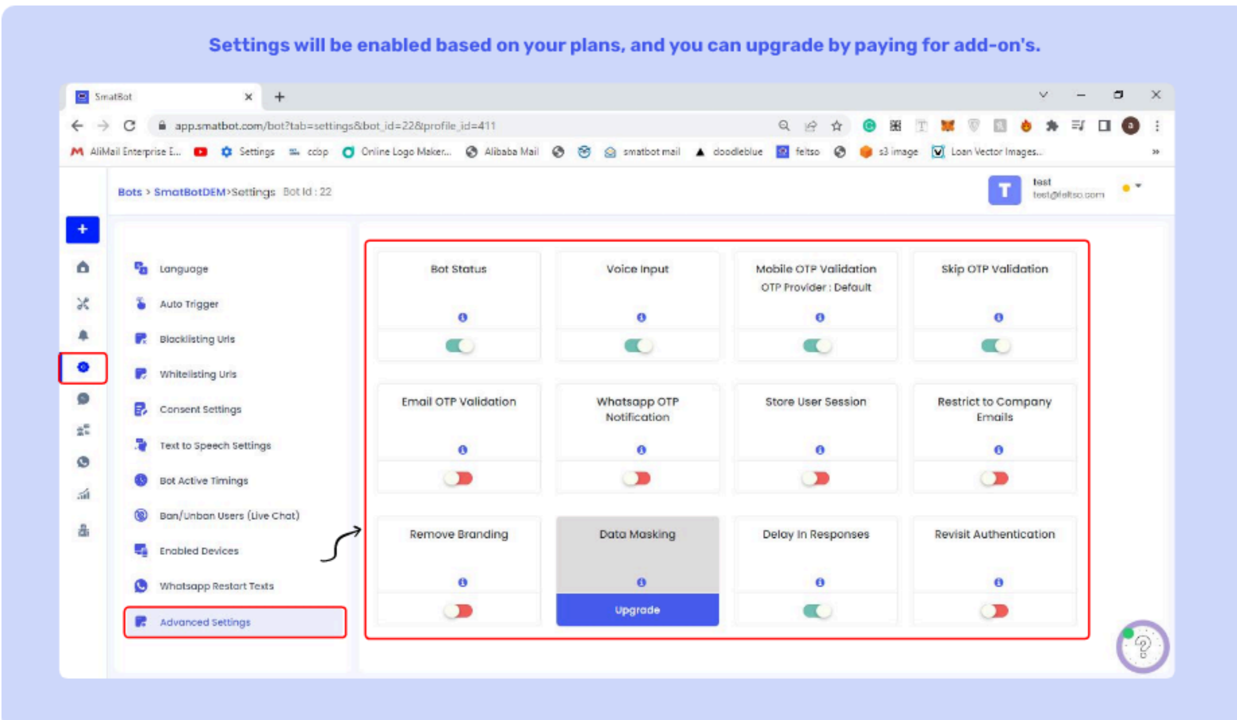


- You can provide a WhatsApp Restart message.



Advanced Settings

- Enable or disable -
    - Bot status, Voice input, Mobile OTP & Email validation and WhatsApp OTP Notifications.
- Store user's session up to 24 hours
- Accept only business emails
- Enable data masking
- Track adwords
- Add a delay in responses
- Turn on revisit authentication.



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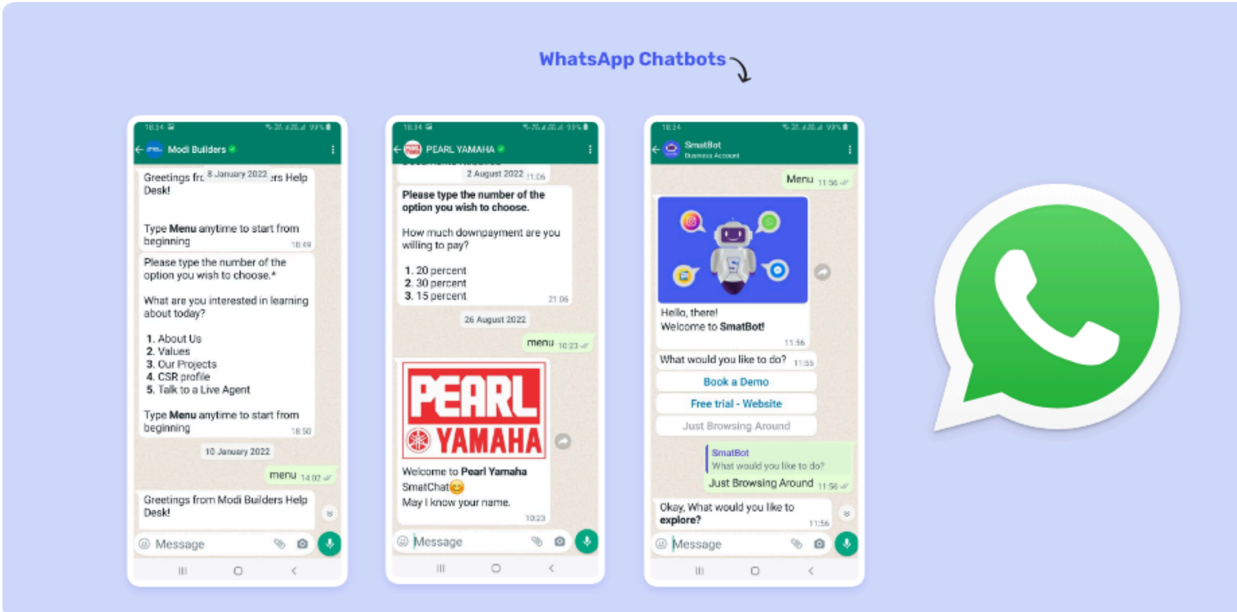
8. Whats App (outer section)

WhatsApp Chatbots & Billing

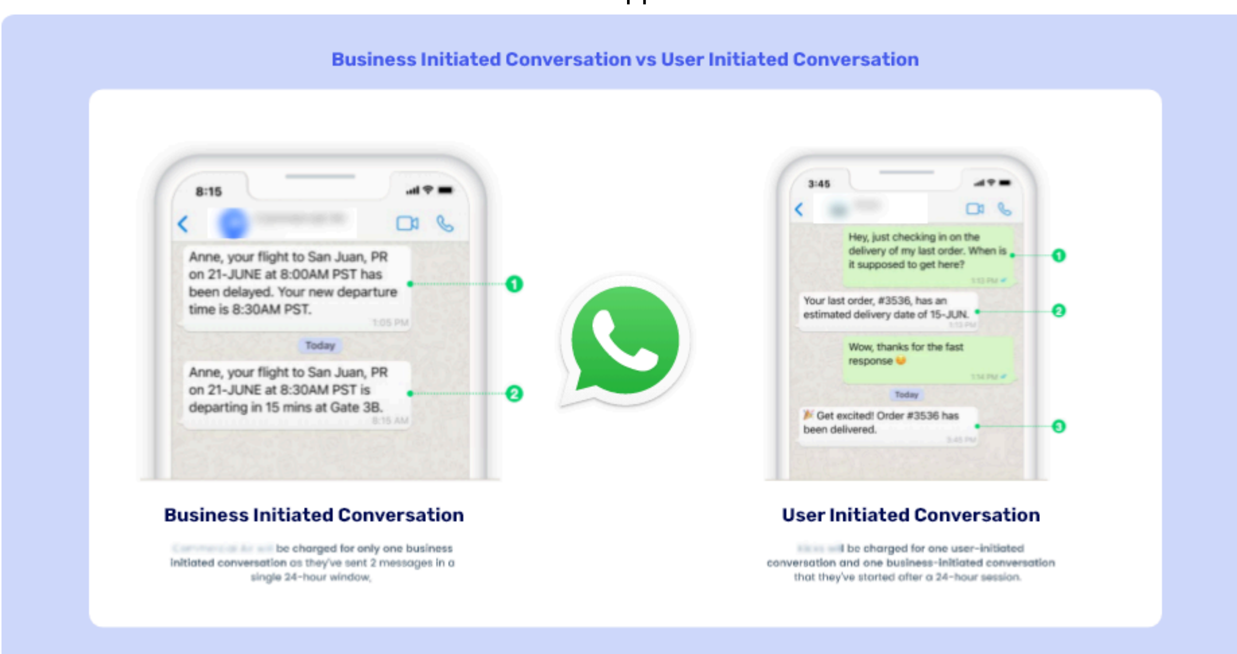


- Add image

WhatsApp is a platform with over 2 billion users in 180+ countries around the world. WhatsApp bots can be used for automating customer support, e-commerce, booking appointments, showcasing products/services, and much more.

To use WhatsApp Bots, you will need a dedicated WhatsApp number. For more details on applying for this number please [click here.]

There are two kinds of ‘Conversations’ in WhatsApp.



- A conversation is a 24-hour window during which you can send an infinite number of messages.

- User-Initiated Conversations:
    - When a user sends a message and a business responds to it, a conversation session is started, which is valid for 24 hours.

- Business-Initiated Conversation
    - If a business sends the first message, the conversation begins instantly and is valid for 24 hours from the moment the message is sent.

WhatsApp prices depend on the number of conversations. During a 24-hour conversation, one can exchange an unlimited number of messages with no extra charge. The price of each conversation varies per country.

Please find details about location wise billing here.

Important Note:

Pricing might change based on the WhatsApp API provider. Each provider has their own pricing.

Meta :

If you connect to Meta directly instead of any providers, you need to enter your credit card information into FB Business Manager. You will be charged monthly based on your usage. SmatBot charges a margin amount for each conversation.

To learn more about Meta's pricing structure, click here. To know about SmatBot's pricing click here

360Dialog :

All providers, such as 360Dialog, have their own pricing per conversation, similar to Meta. SmatBot charges a margin amount for each conversation.

To learn more about 360 Dialog's pricing structure, click here.

WhatsApp E-commerce & Catalogue

Pre- Requisites

1. **Facebook Business Manager**

2. **Catalog in Commerce Manager**

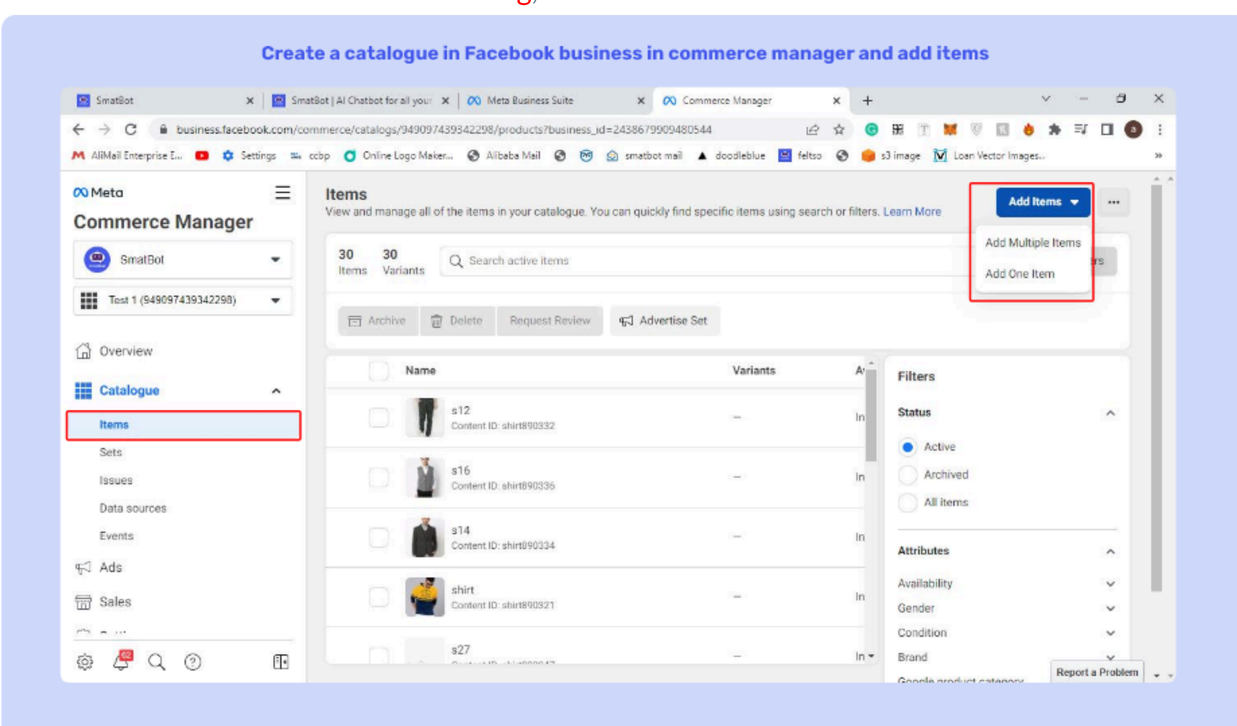
3. **Business API Connected to Facebook**

4. **Phone Number**

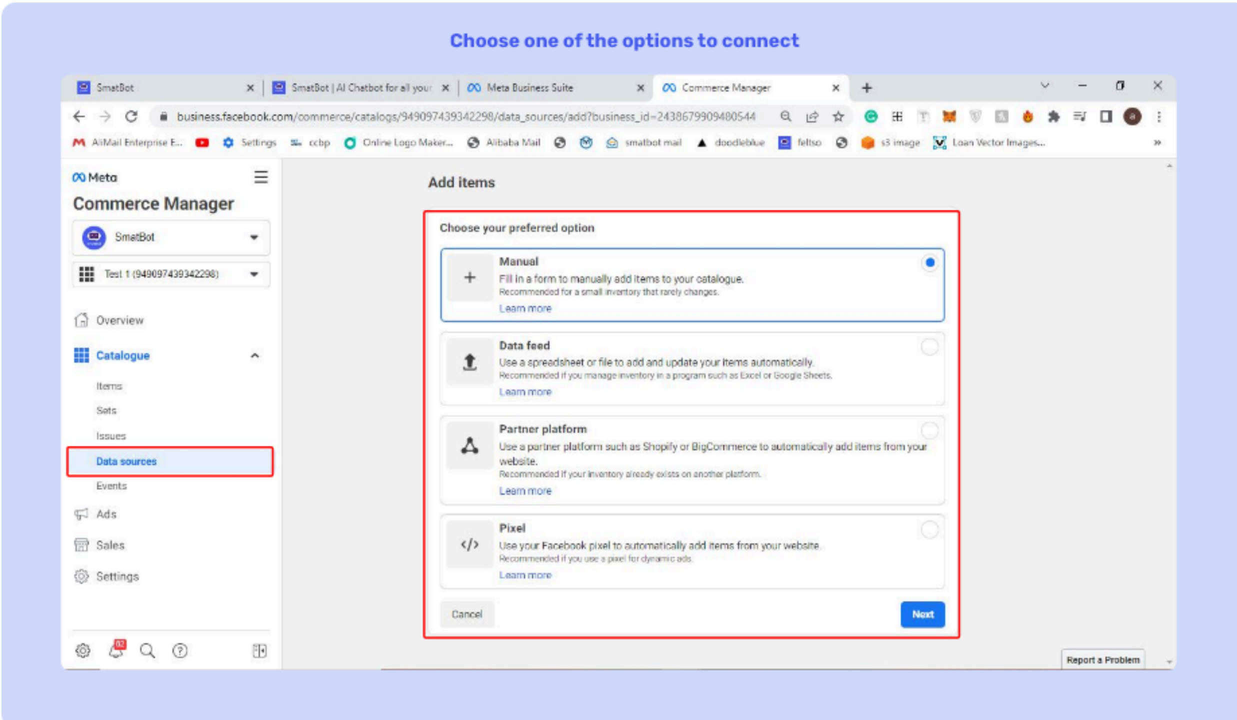
5. **WhatsApp Business API met**

Step 1:

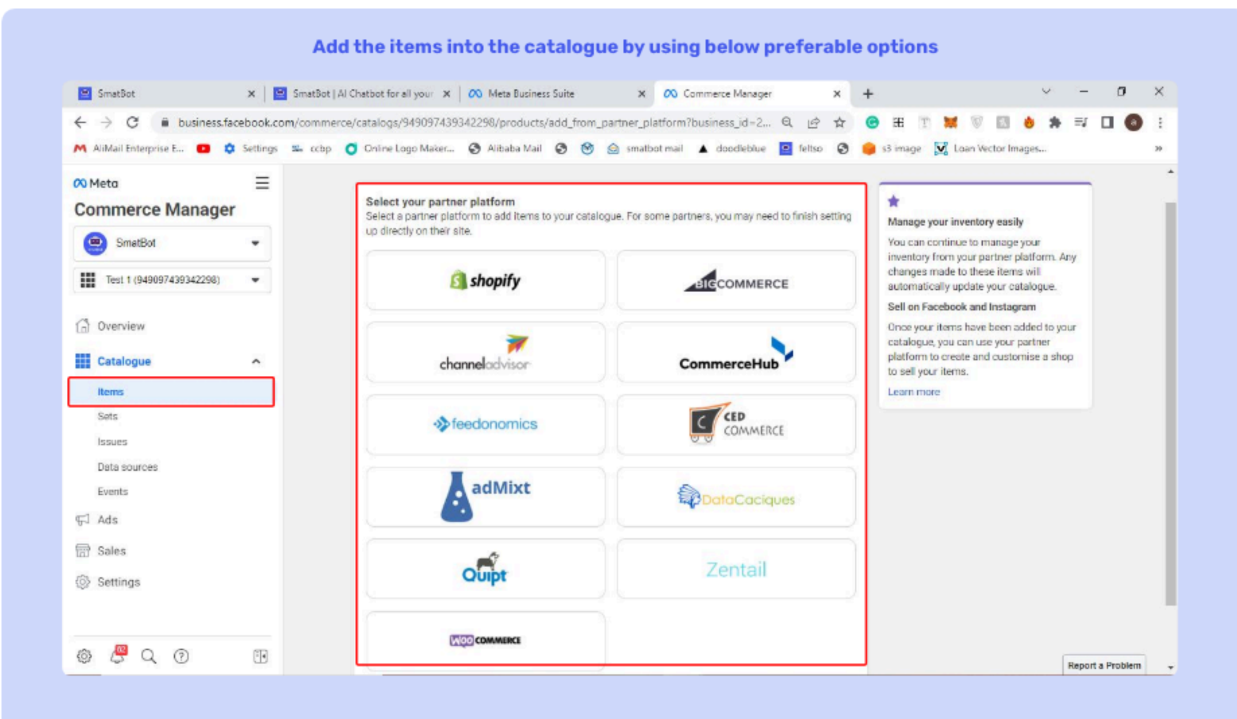
- Create a catalog in Facebook Business Commerce Manager and add items.
    - To add items in the catalog, click on **Add items.**



- Choose one of the options listed to connect.



Add the items to the catalog by using any of the following:

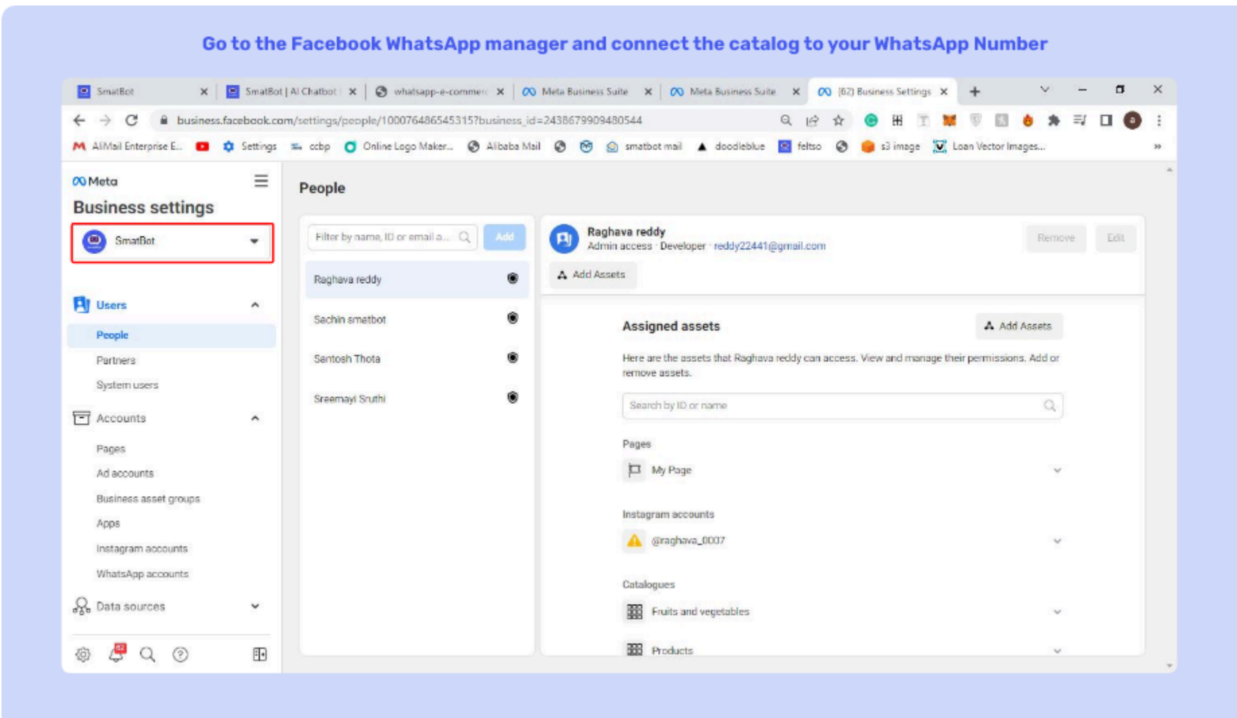


1. Google Spreadsheet (Data Feed)
    a. You can update data frequently by selecting the time in your commerce manager and typing in the spreadsheet URL.

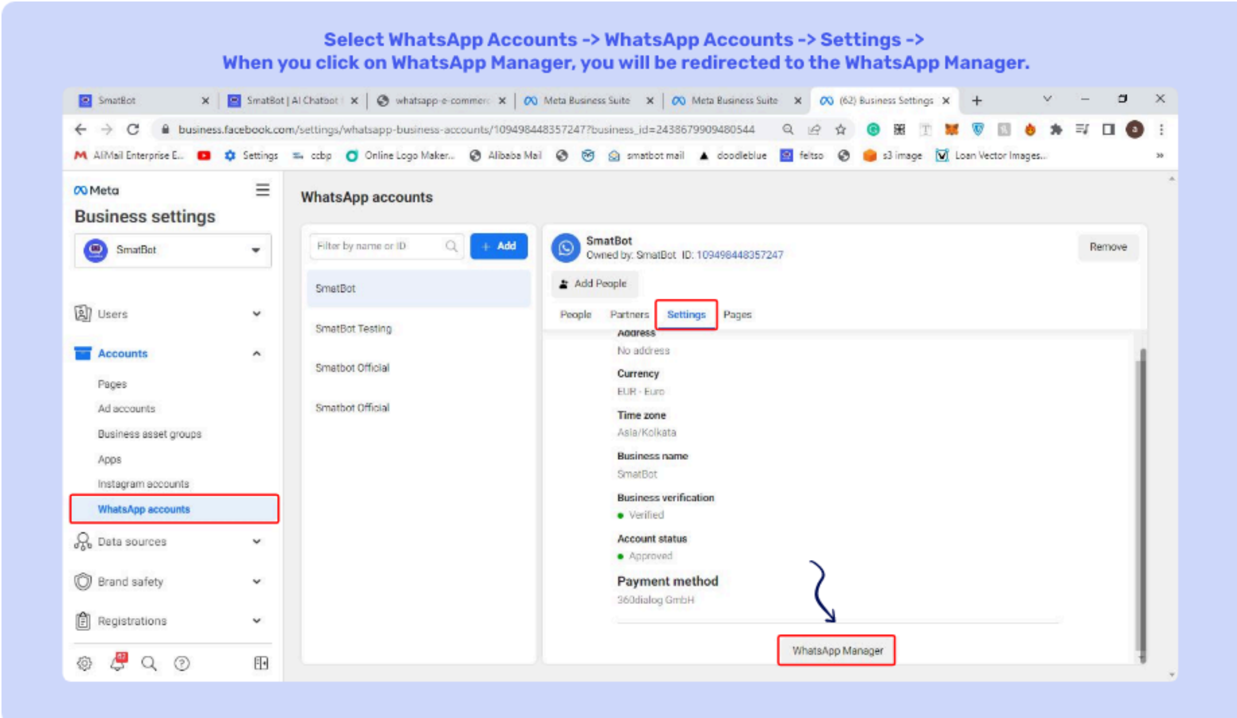
2. Facebook Pixels
    a. If you choose Pixels, a Meta tag is given that must be added to your commerce website to update the details automatically.
3. Manual Entry
    a. This method is not recommended.
4. Connecting A Partner Platform
    a. Connecting with a partner platform such as Shopify.

Step 2:

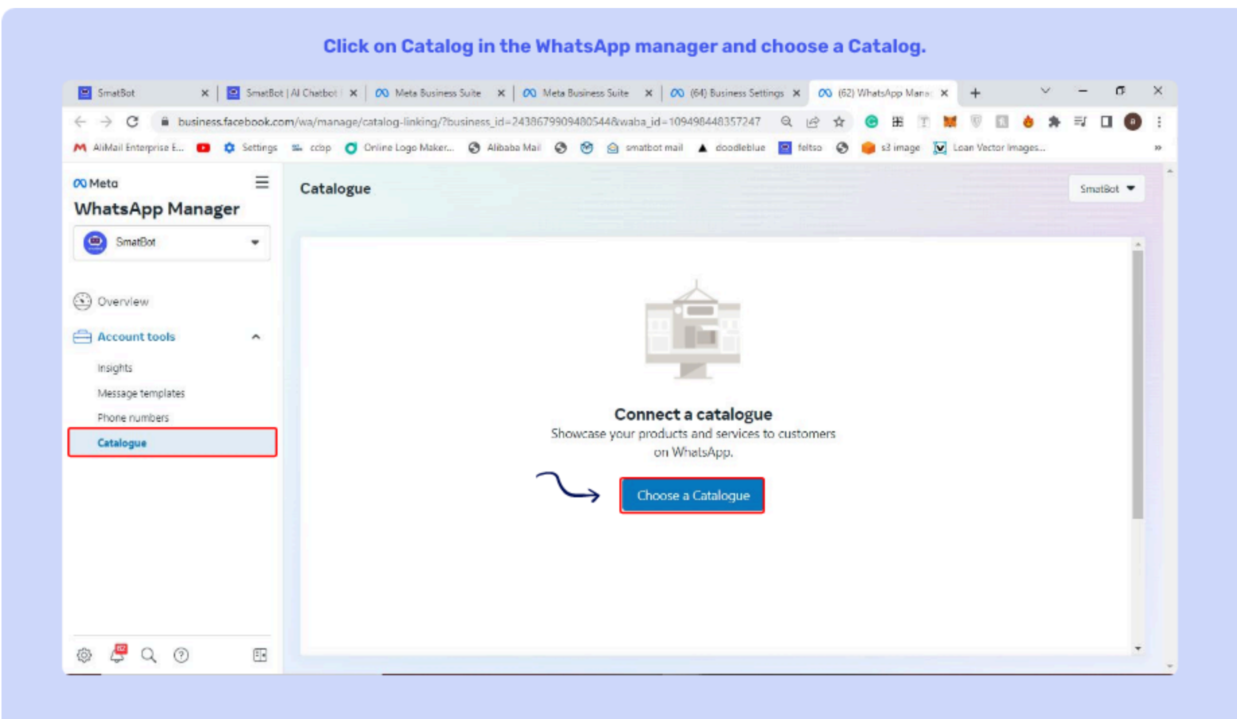
- Go to the Facebook WhatsApp manager and connect the catalog to your WhatsApp Number.
    - To do this, **Open Facebook Business Manager and click on Settings.**



- In the **Accounts section, click on WhatsApp Accounts => Settings => WhatsApp Manager.**



- In WhatsApp Manager, click on **Catalog** and then on **Choose a Catalog.**

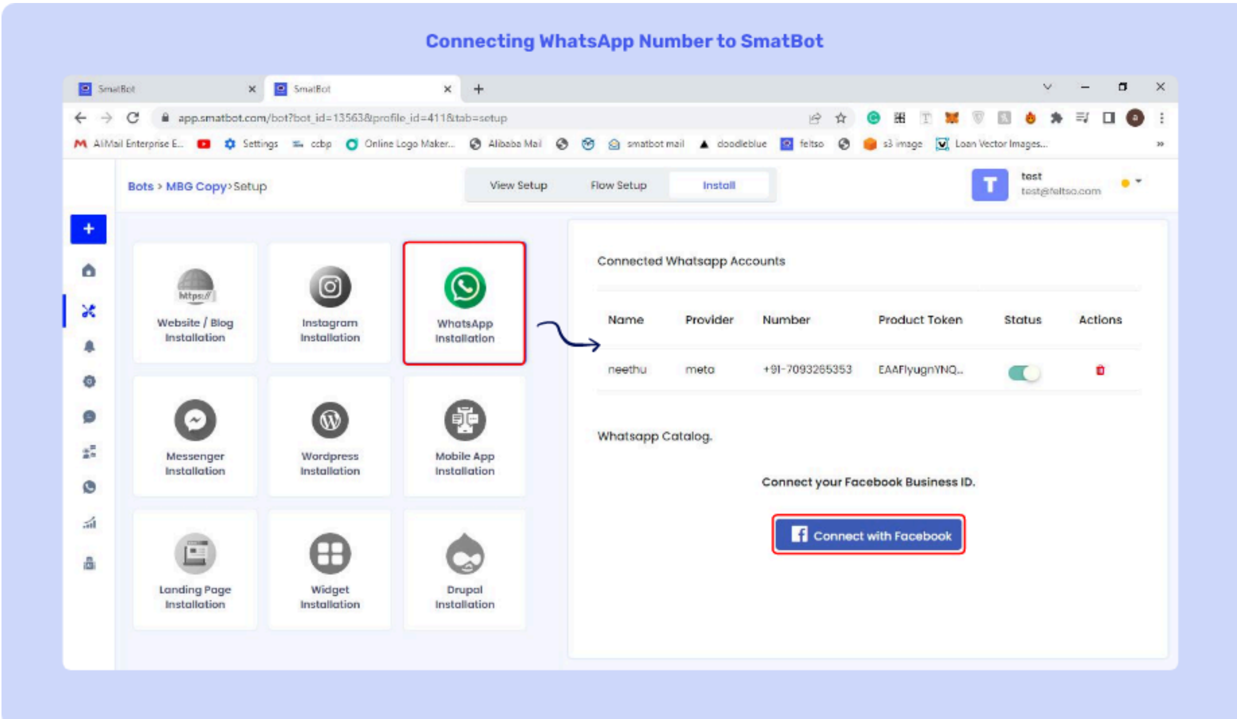


- Now, choose one of the catalogs from your Business and click on the **Connect Catalog** button.
- If you don't have any catalog's, create a Catalog in the Commerce Manager.

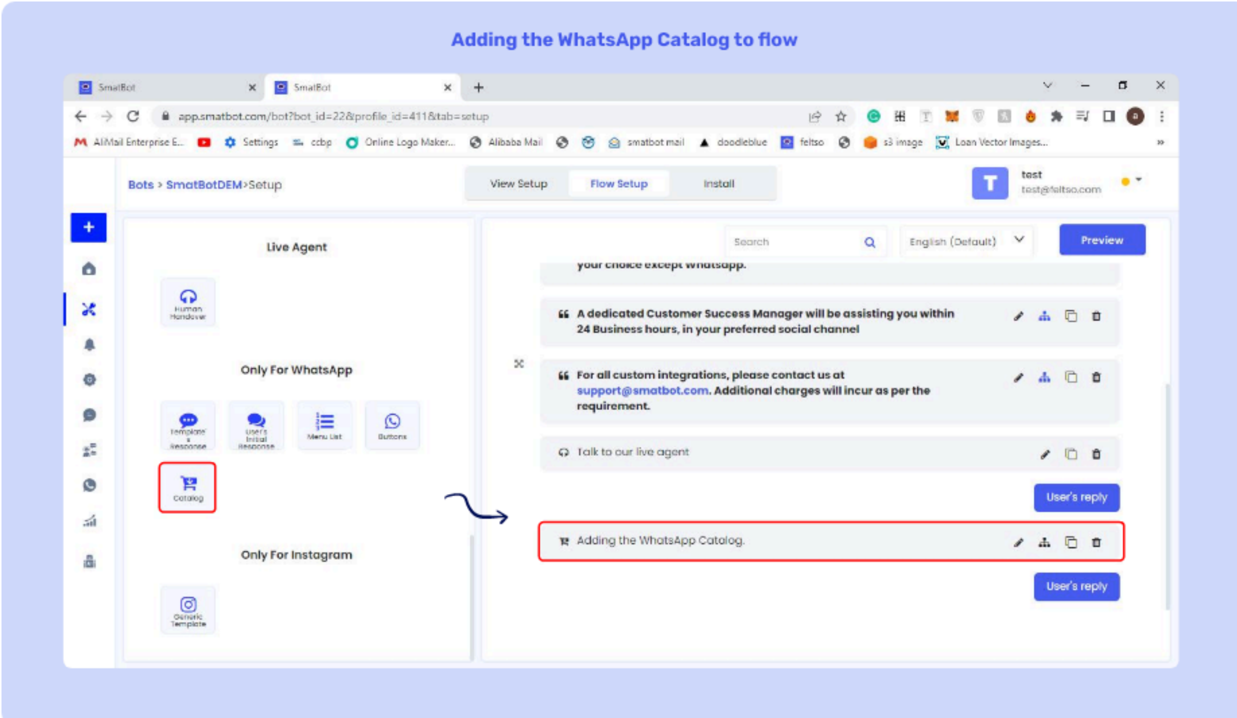
Great! You have connected a catalog to your WhatsApp business number.

Step 3:

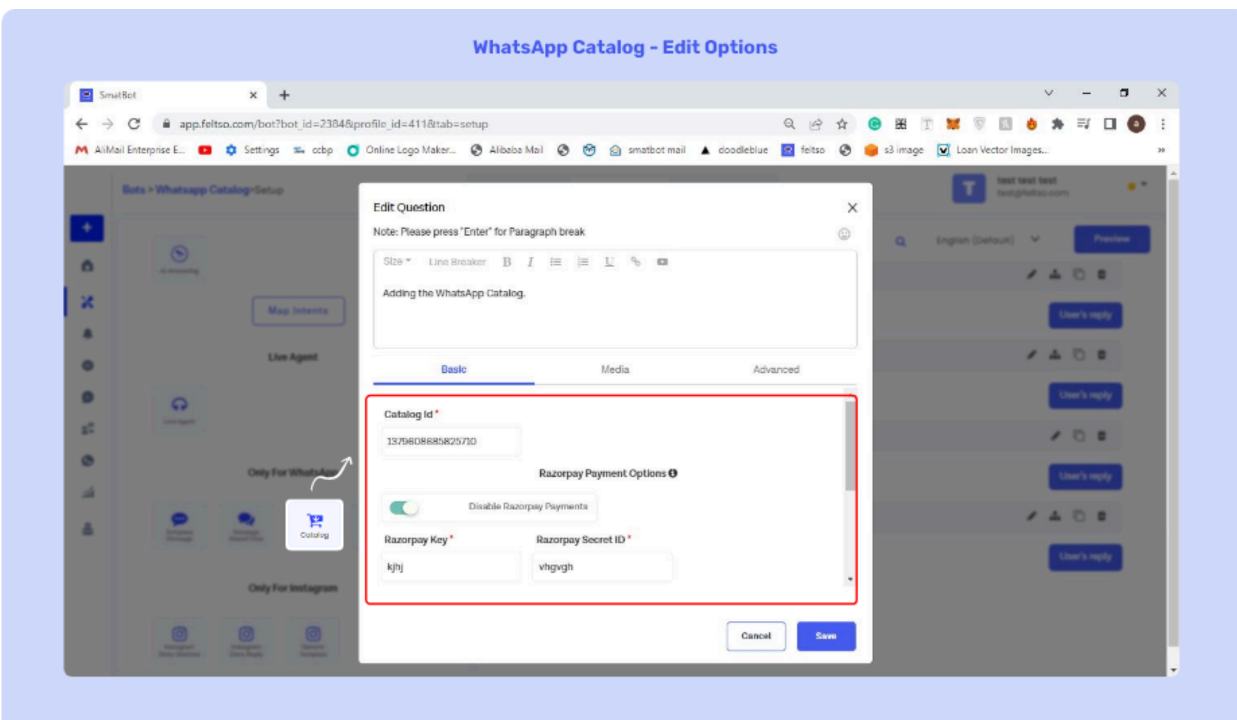
- [Login](#) to your Smatbot Account.
- Open your bot and go to the **Install section** ⇒ **WhatsApp Installation.**
- Under **WhatsApp Catalog** section, click on the **Connect with Facebook** button.



-
- Once your Facebook account is connected, go to **Flow Setup** and add WhatsApp Catalog questions to your flow



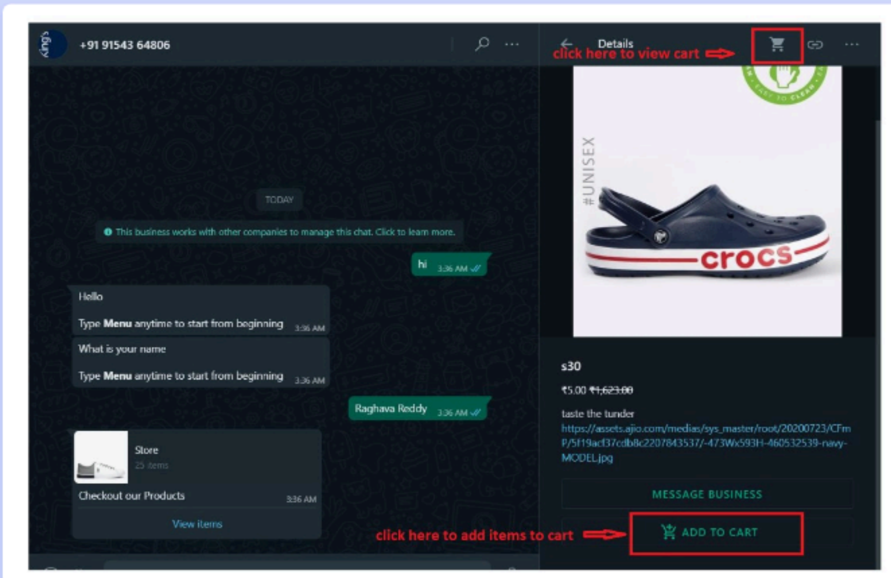
- Click on edit icon to submit the Catalog ID.
- You can choose to enable Razor pay payment option. To do this, submit the Razor pay secret ID and Razor pay secret key.



How to Navigate :

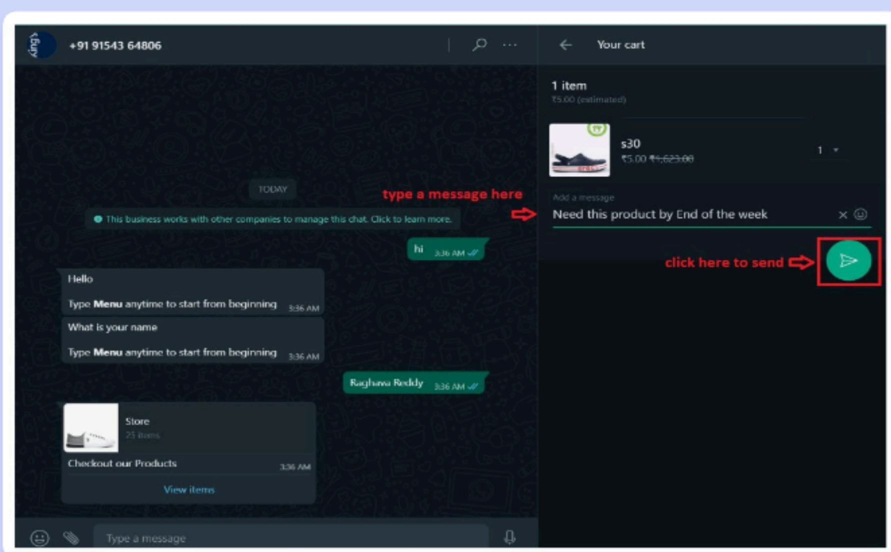
- Once everything is done, the WhatsApp message will look like this.
- You can choose any item and add it to the cart. To view the selected items, click on the **Cart Icon.**

To view the selected items, click on the Cart Icon

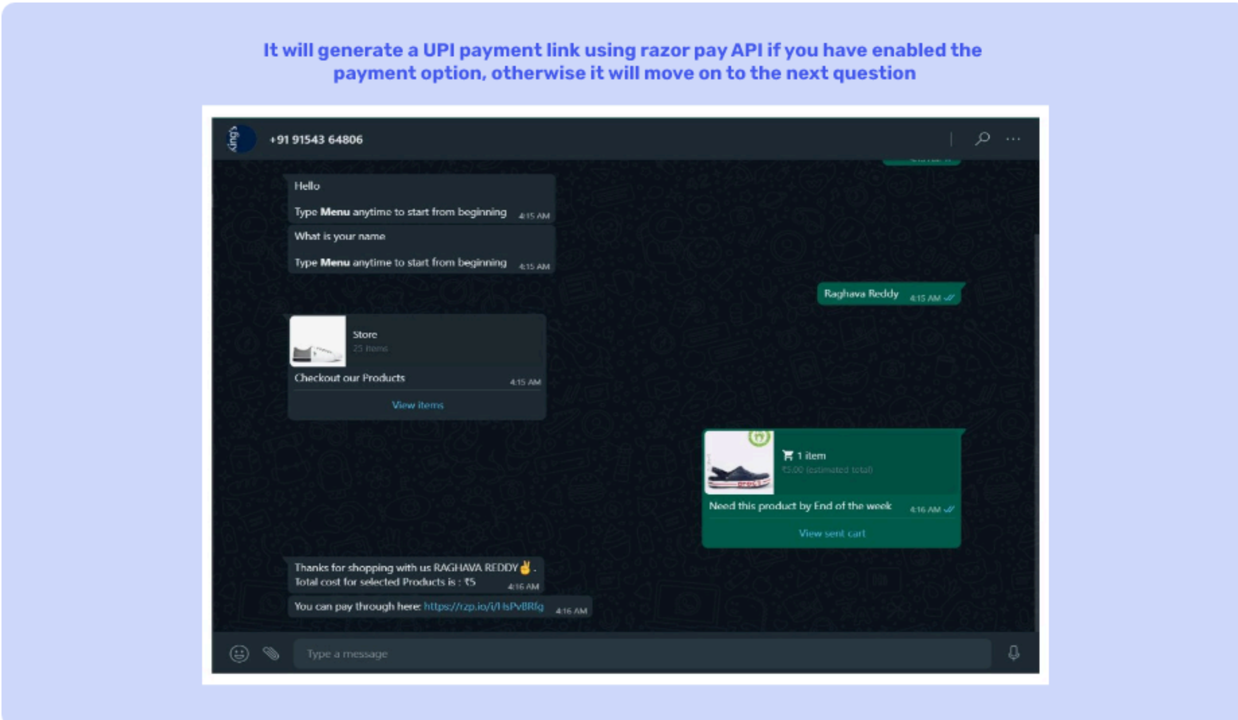


- If you wish to send a message, then type the message and click on the **send button.**

If you wish to send out a message, type it and click the send button.



- If the payment option has been enabled, the bot will generate a UPI payment link using the Razorpay API. Otherwise, it will proceed directly to the next question instead of giving the payment link.



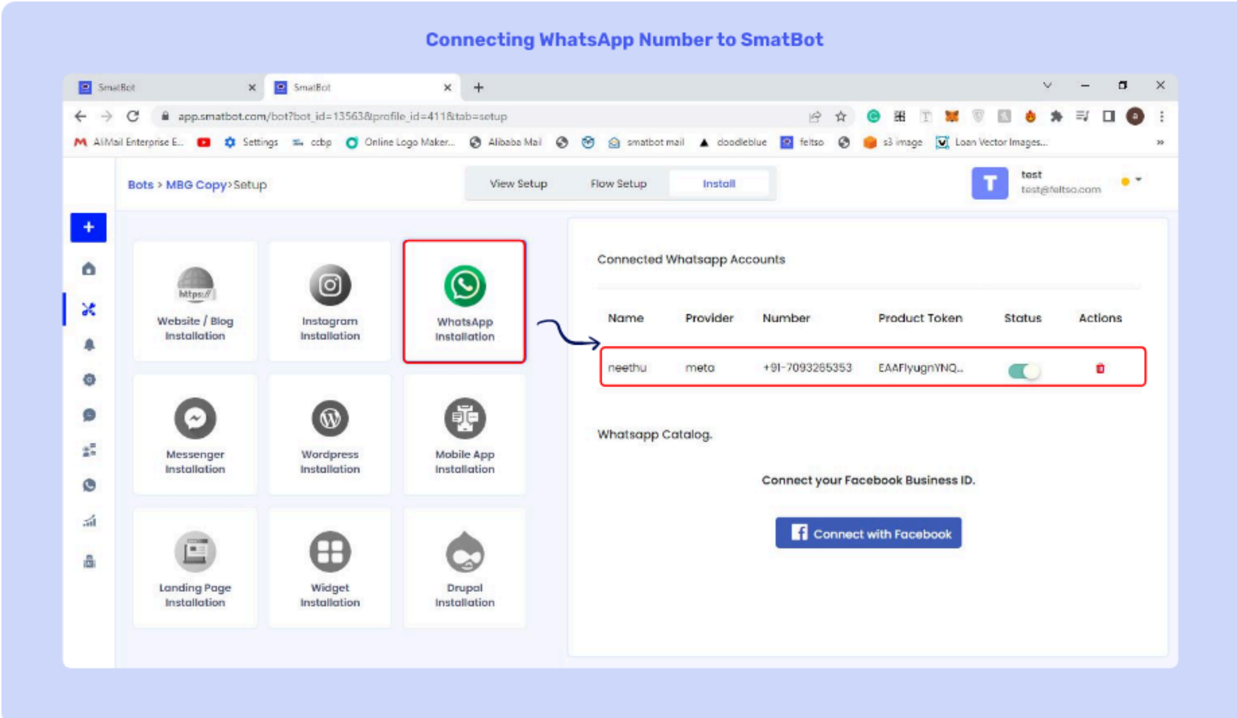
WhatsApp Template Messages

WhatsApp templates or business-initiated messages can be used to send promotions, discounts, information, and much more.

Use SmatBot to send bulk messages to your existing customers or prospective leads.

Step 1:

To begin, Go to Bot Set up in the dashboard. Click on WhatsApp Template Messages.

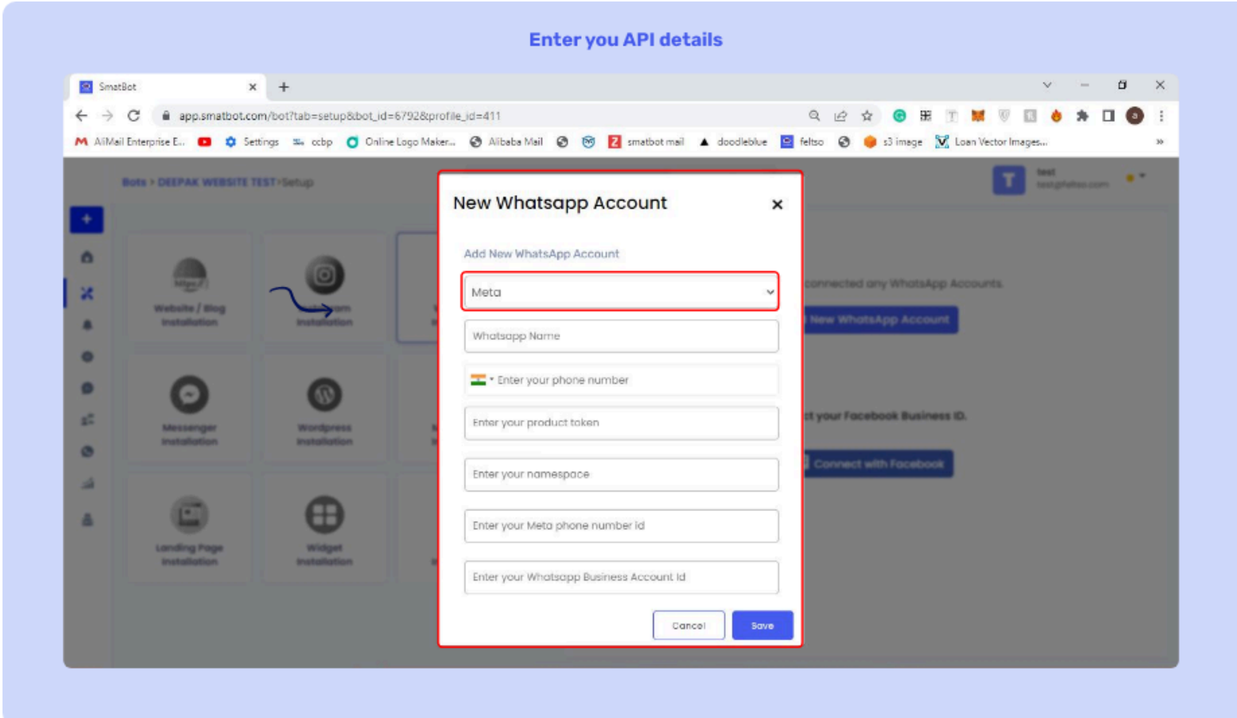


Step 2:

Connect with your WhatsApp Business account.

- From the drop-down box, Choose the Meta Official Business Provider name through which you registered your WhatsApp Business API Account.
- Provide the following details - WhatsApp Business API, WhatsApp Name, WhatsApp Number, Product Token and then click on Save.

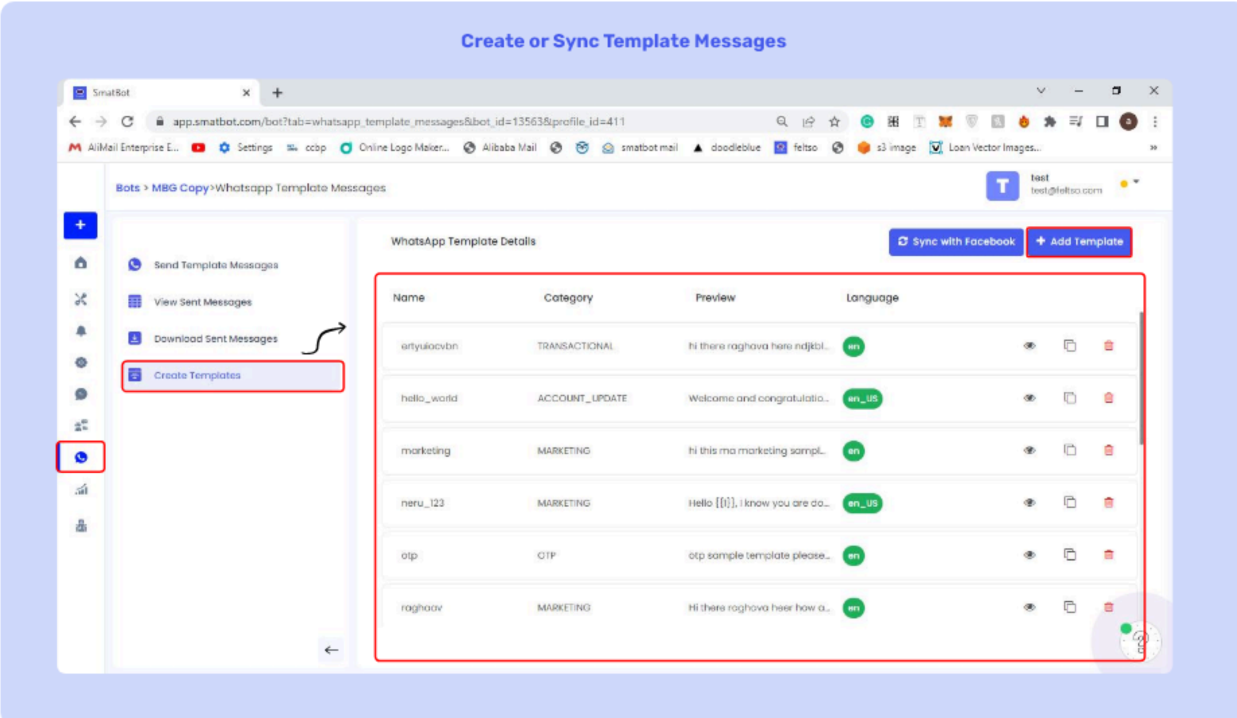
-



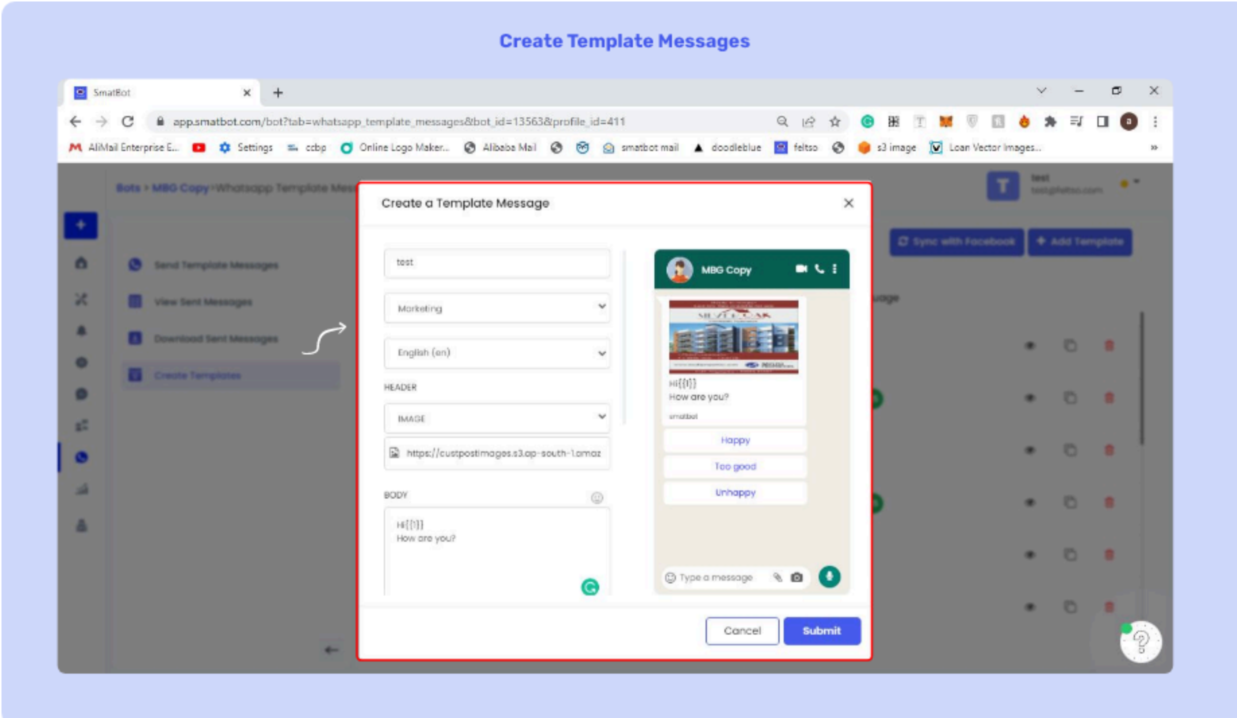
Great! You have successfully connected your WhatsApp Business account.

Step 3:

Navigate to Create Templates & Click on **Add Template**



- You can create text, media or interactive template messages.
- Name the template. Make sure the name does not have more than 512 characters. Select the language and category.
- Choose from the dropdown list and insert the required header.
- The content field in the Body is limited to 1024 characters.
- Add buttons as required.
- For button text, the character limit is 20. Click on submit.
- You can add variables in the Body such as recipient name to make it dynamic and interactive.

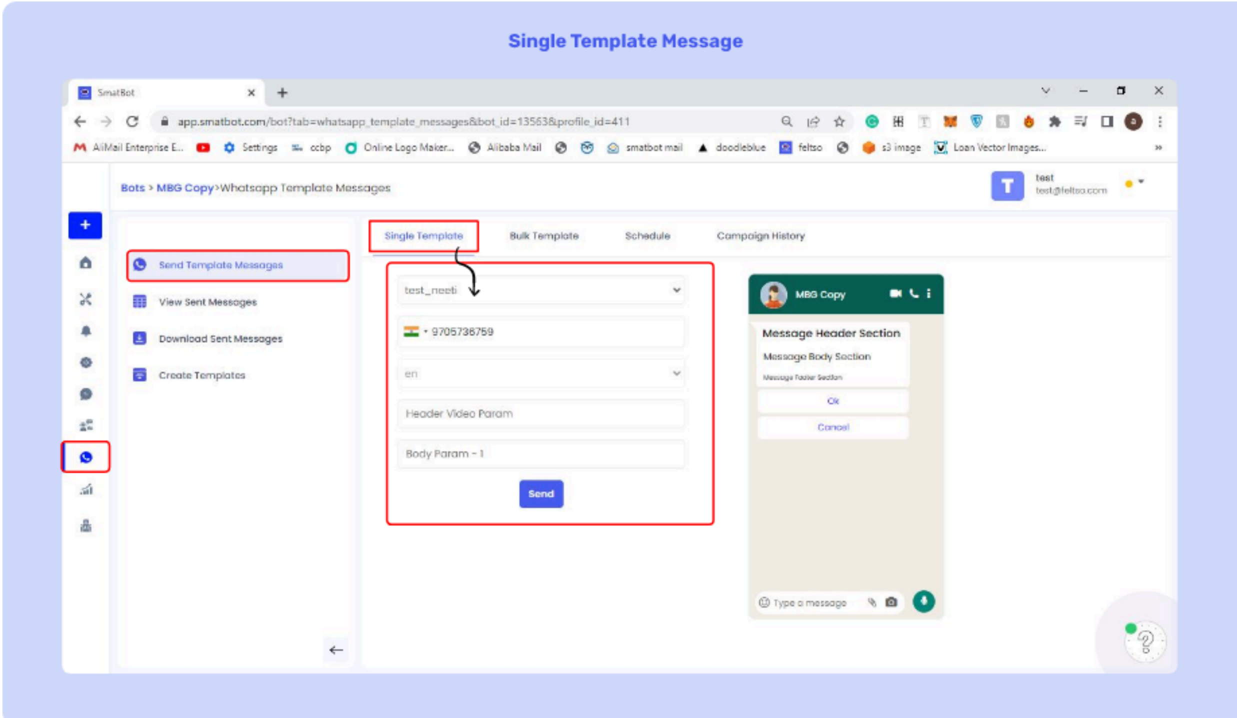


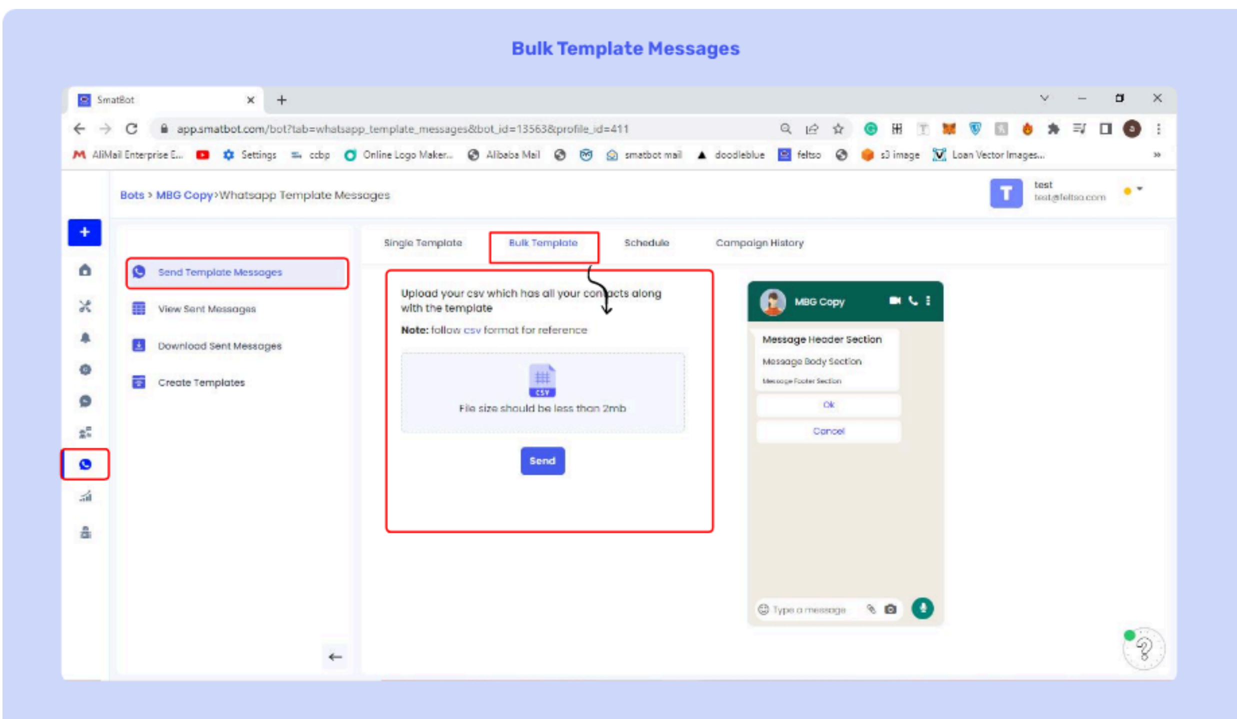
Facebook takes 24-48 business hours to review the template. You can see the submitted, approved or rejected status beside your template name. You can re-apply for the template if it gets rejected.

Step 4:

Now, let's see how to Send Template Messages.

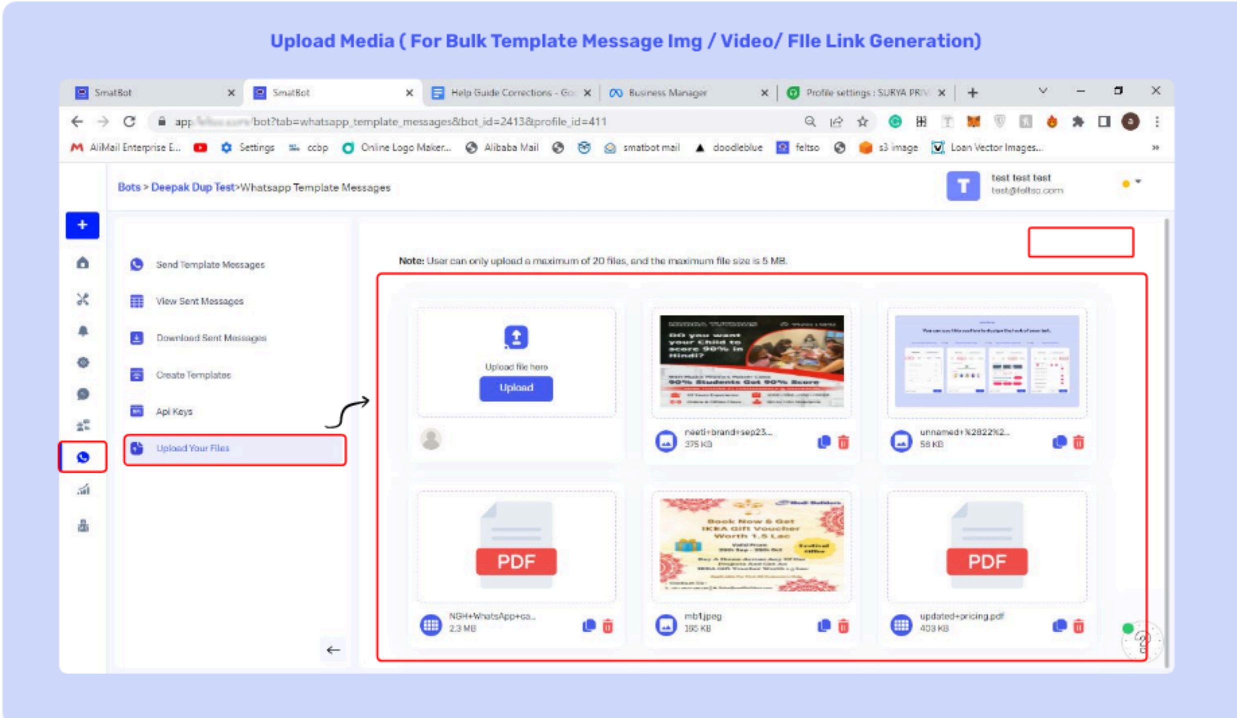
- In the Single Template, select your template and add the recipient number.
- In the Header Param, add the image URL and in Body Param, add the name of the recipient & click on send. Great, your template message has been sent.
- Add file URL in Header Param if it is a media template.
- Add variables, such as the name of the recipient, in the Body Parameters.
- You can also send variables in Button Params in case there are custom URLs.
- Now, click on Send.
- Your template message has been sent.

- 

-
-
- For Bulk Template, upload a CSV file below 2 MB & send.
- 

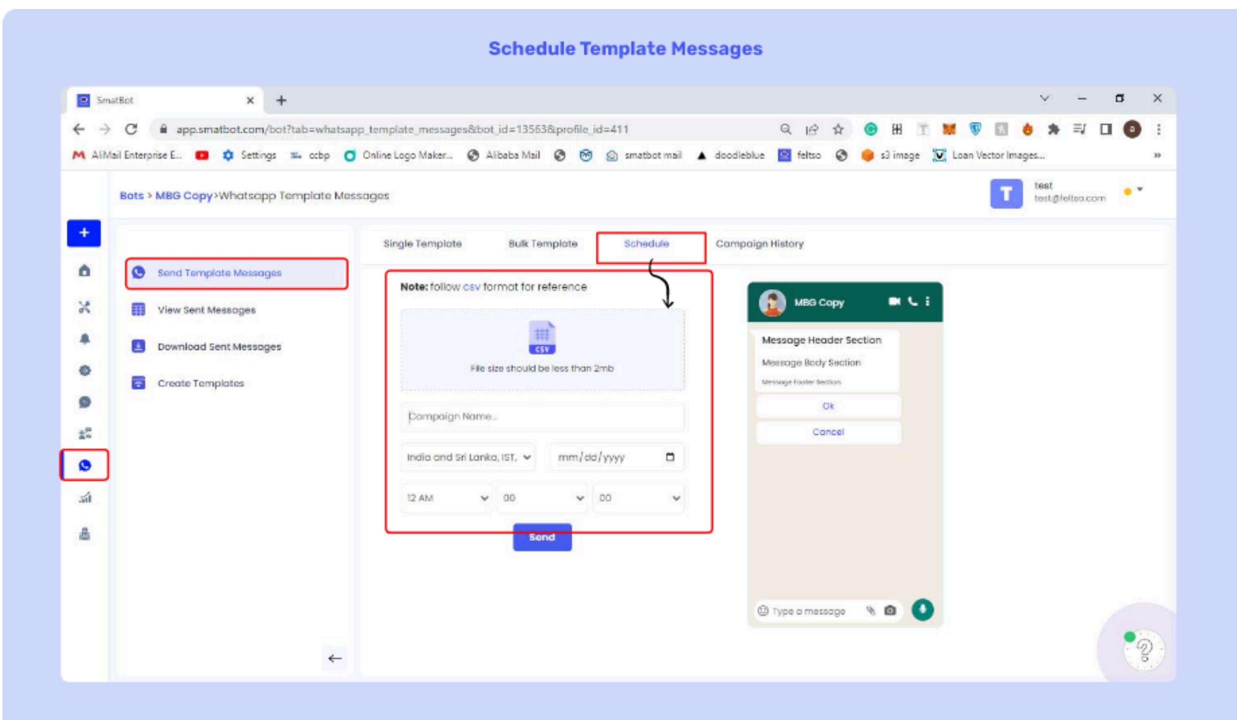
-
- If you want to include any media files, go to the WhatsApp Section in the dashboard and click on **Upload Media**. Copy the URL & paste it in the CSV file.

-



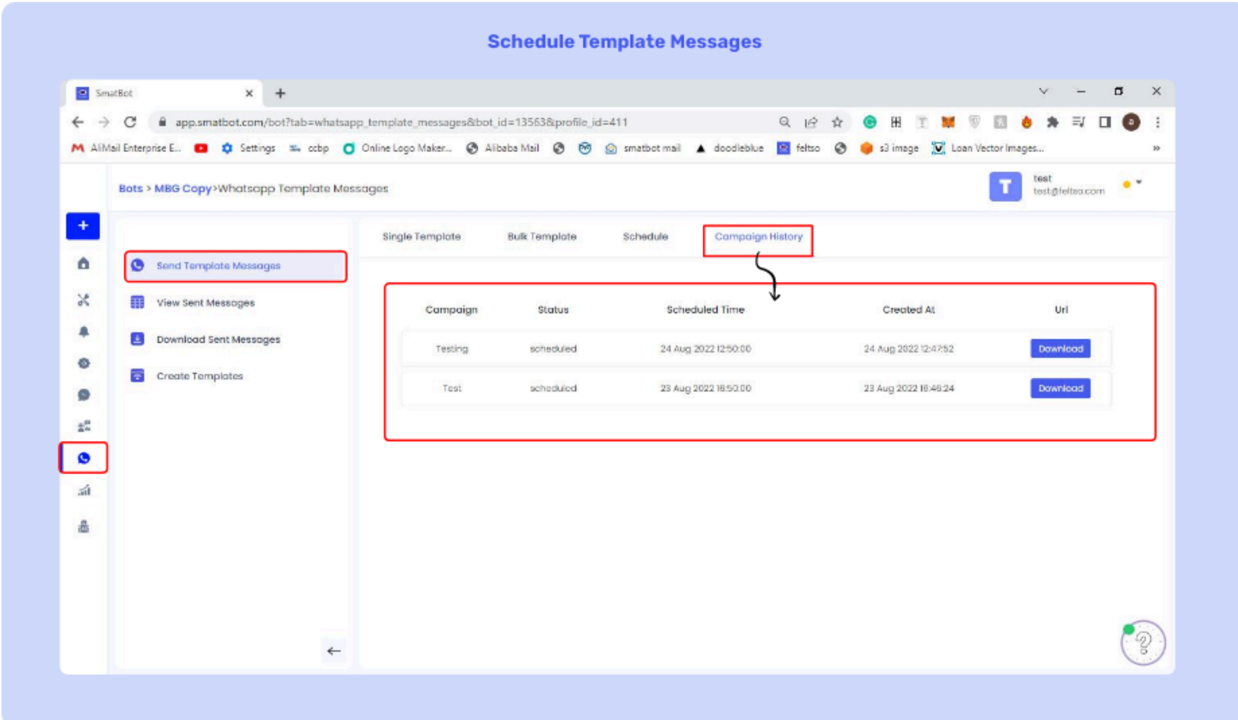
- For format reference, you can download the file. Make sure to follow the same format.
- You can also schedule the required WhatsApp template message according to the time and date.

-

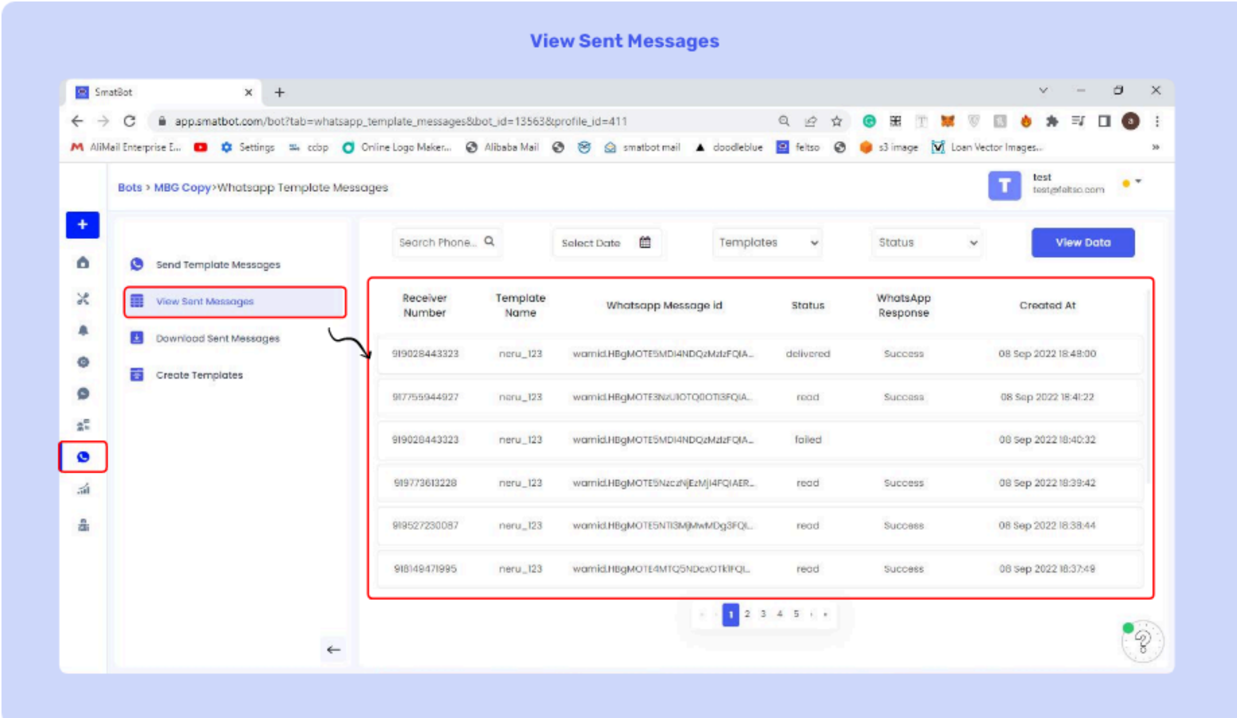


Step 5:

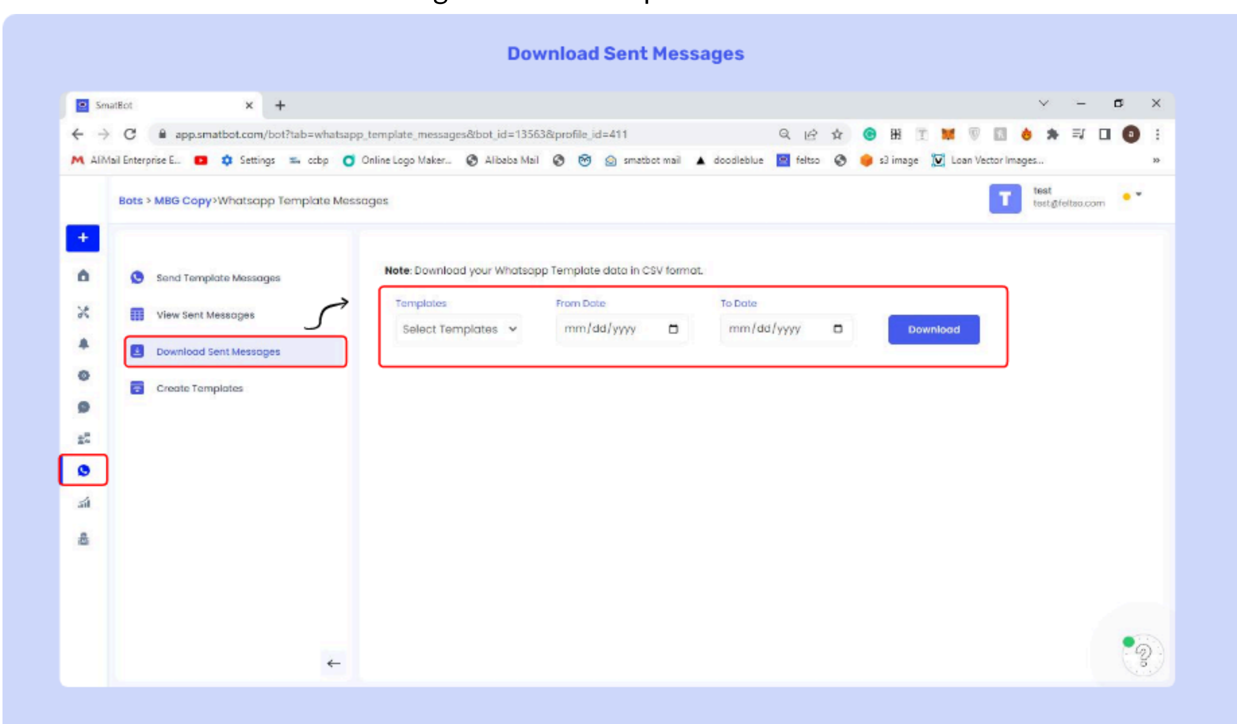
- In campaign history, you have the entire list of scheduled campaigns.



- By applying filters, such as date, template name, and status, you can see detailed data in **'View Sent Messages'**



- You can also download sent messages with the template name & custom date.



-

Wonderful! You have successfully learnt to send WhatsApp Template Messages.

9. Facebook (outer section)

FB Business Manager Verification

For any business to have its official WhatsApp number, the first step is to get their Business Manager verified.

The steps below will help you through the process.

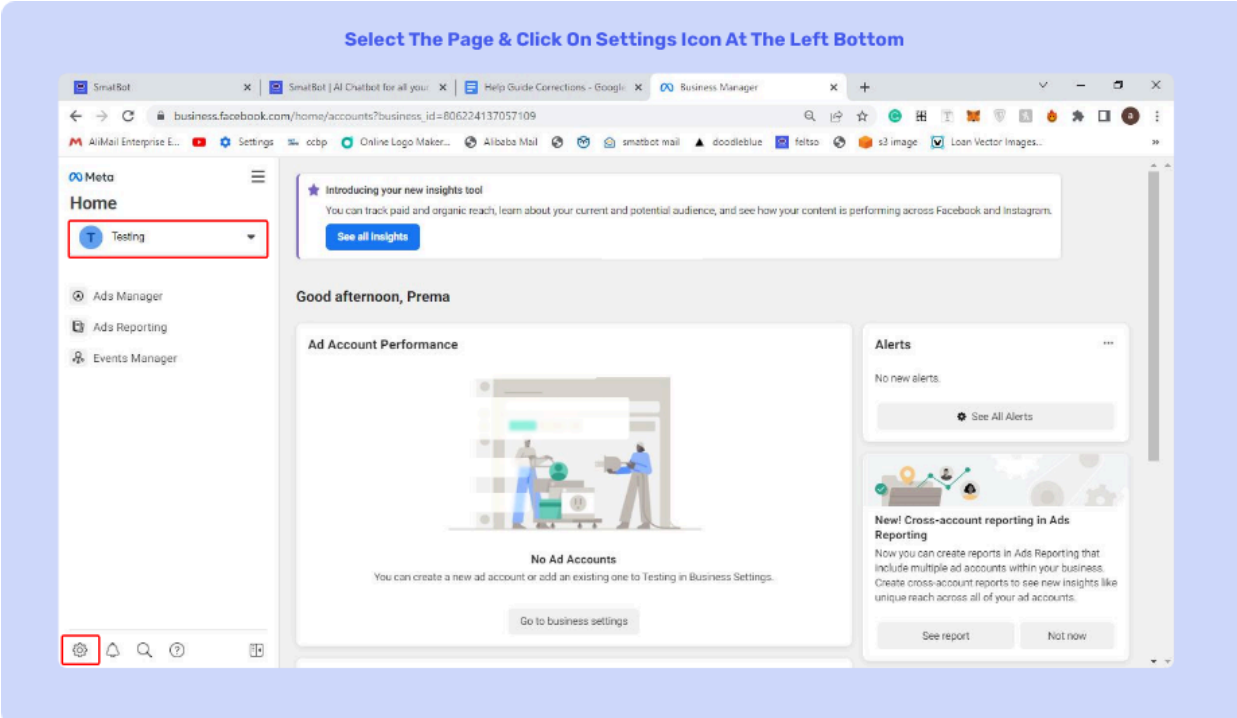
Step 1:

- Create a Facebook Business Manager page using the **FB page Admin credentials** for your Business Facebook page here, https://business.facebook.com/.

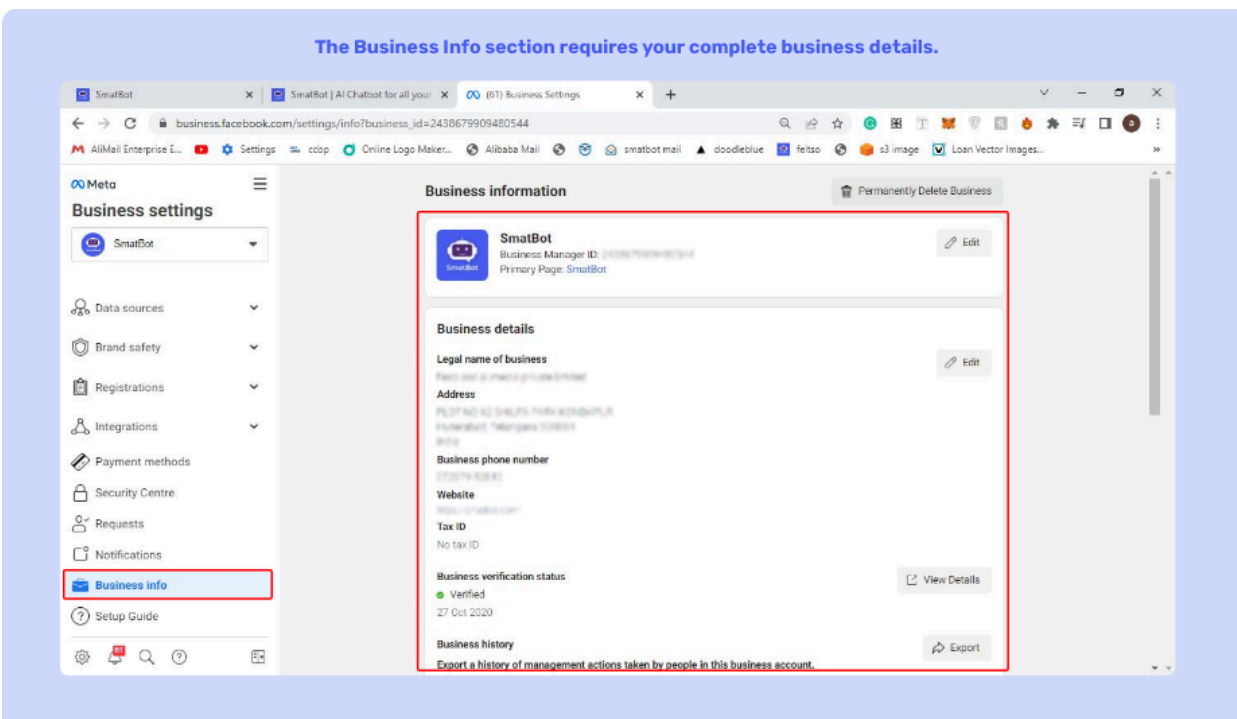
Note: Please make sure your FB page and Business Manager credentials are the same. Also make sure the Admin has access to edit.

Step 2:

- Log in to the page. Click on the Business Settings icon.



- Go to the Business Info section and provide your business details. Click on save.



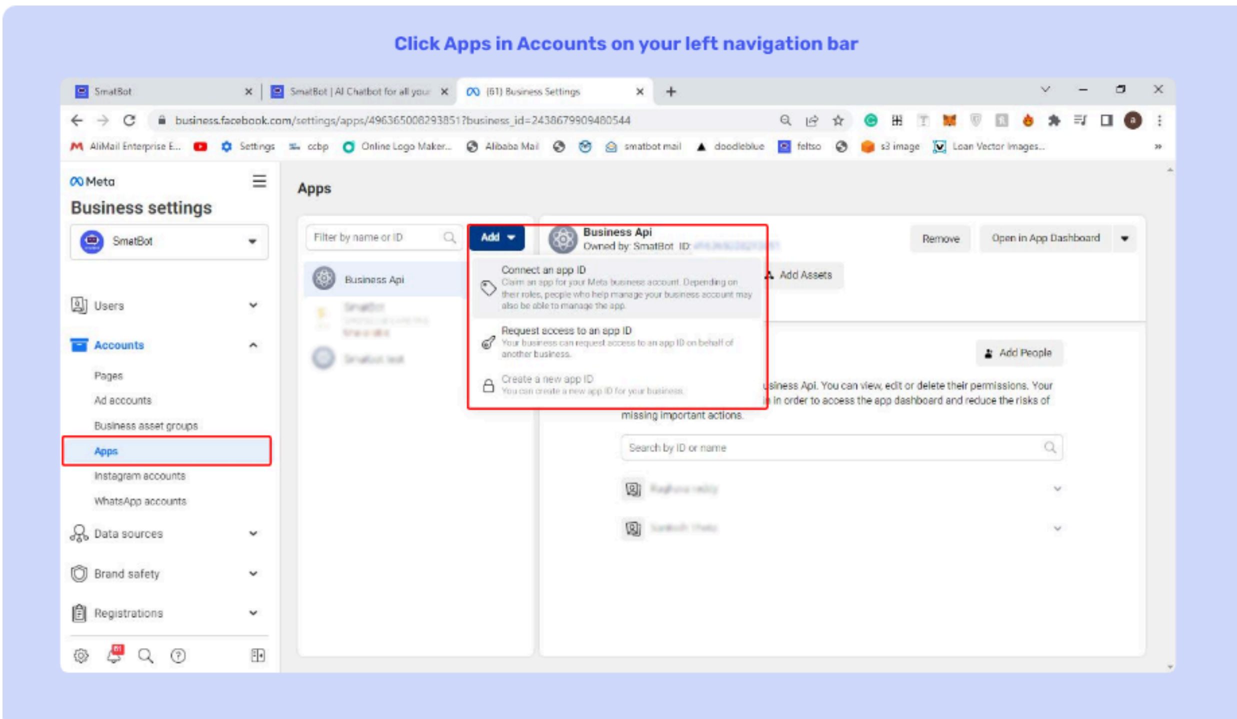
-

Enter Organization Details:

Enter your business details and click on next.
Note: The information you provide during the business verification process will be publicly visible if your page has a large United States audience or runs advertisements about social issues, elections, or politics in the United States.

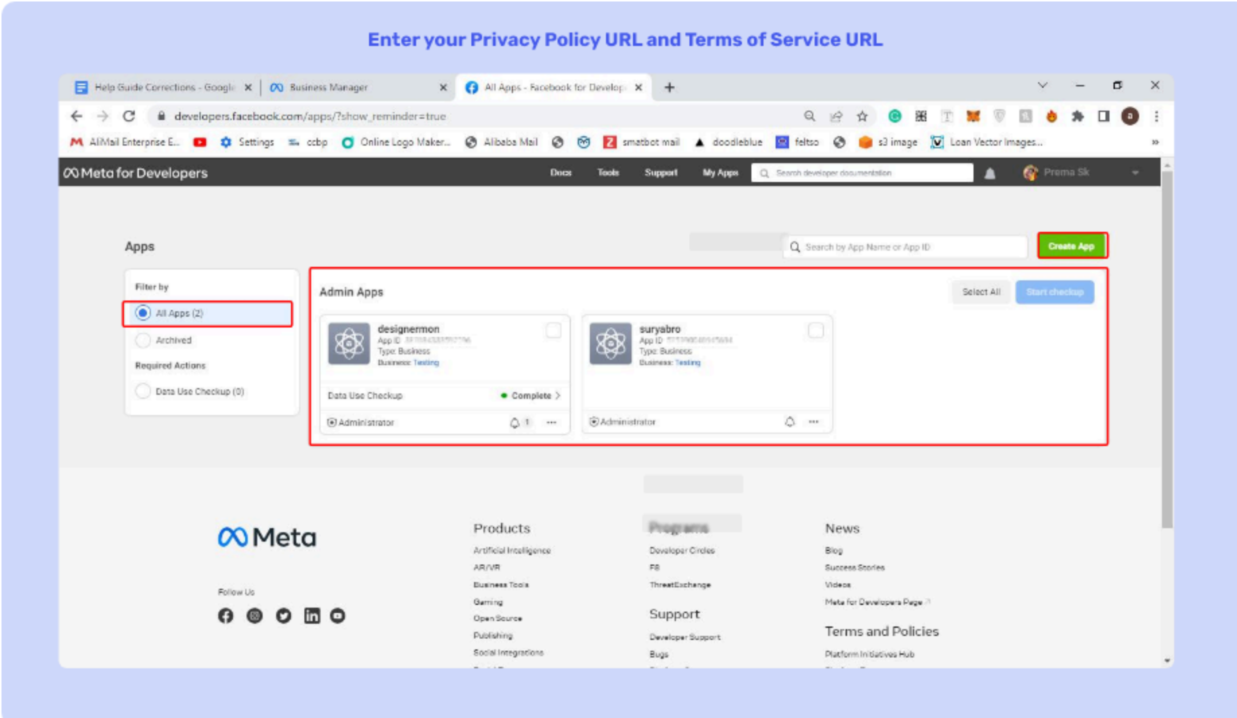
Step 3 :

- Within the Business Section, Click on Accounts and then on Apps.

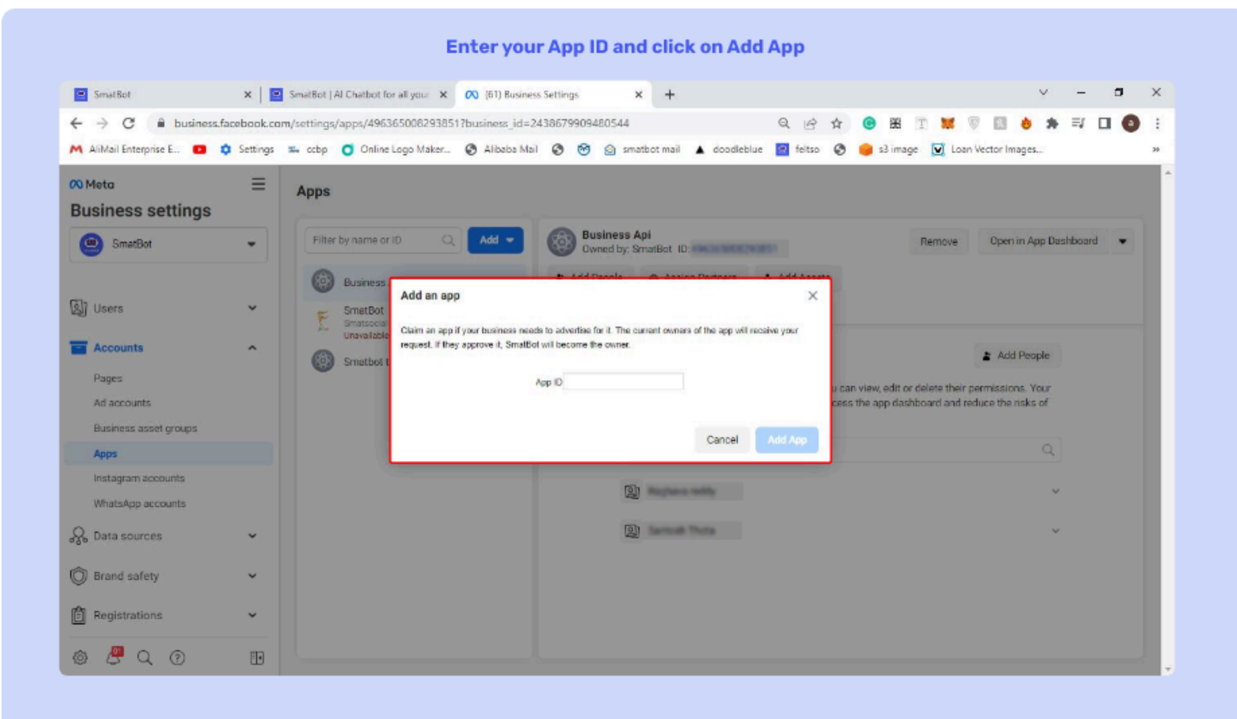


-
- **Note:** If you don't have an App ID, create one using the link here.

Select **My Apps** in the dashboard.



Click on **Create App** and choose an App type.



Step 4 :

Provide the display name and choose the business account where the app will be connected.

Once done, click on create app and enter your password.

Next, go to the business settings page and refresh.

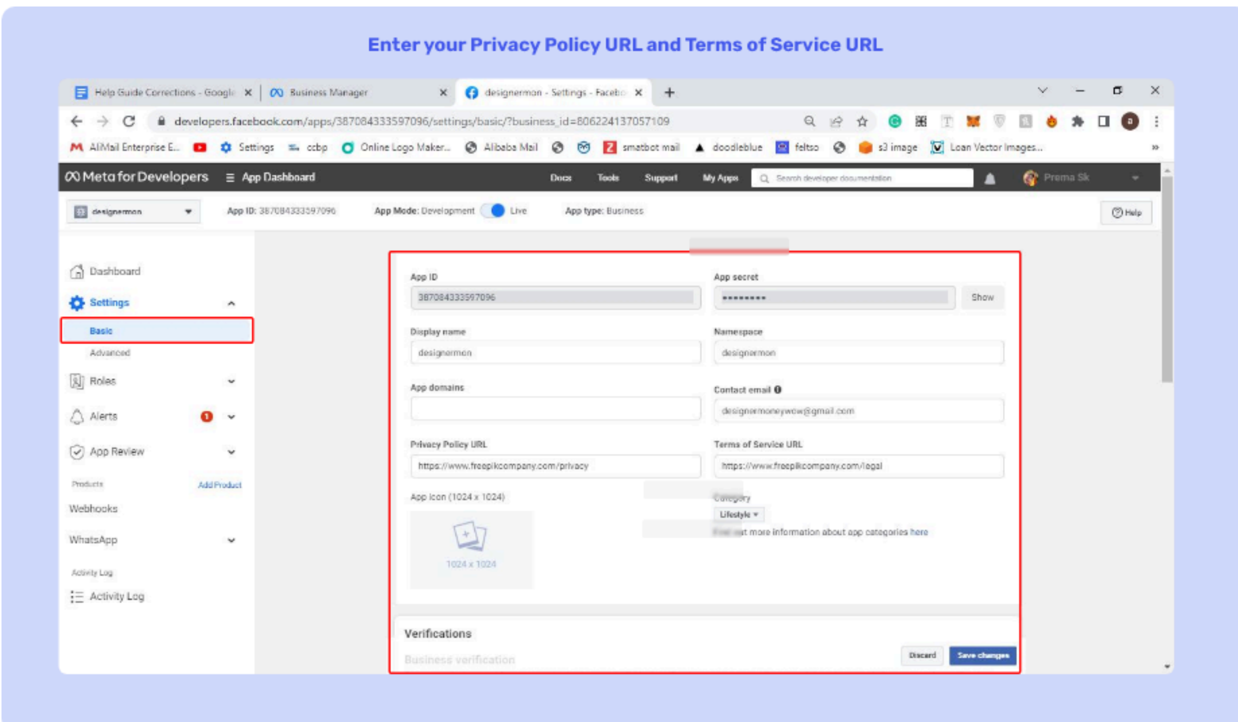
Your App should be displayed.

Step 5:

Navigate to this link - https://business.facebook.com/

In the Facebook Business Dashboard, select Settings and then Click on **Basics.**

Enter your company's Privacy Policy URL and Terms of Service URL.

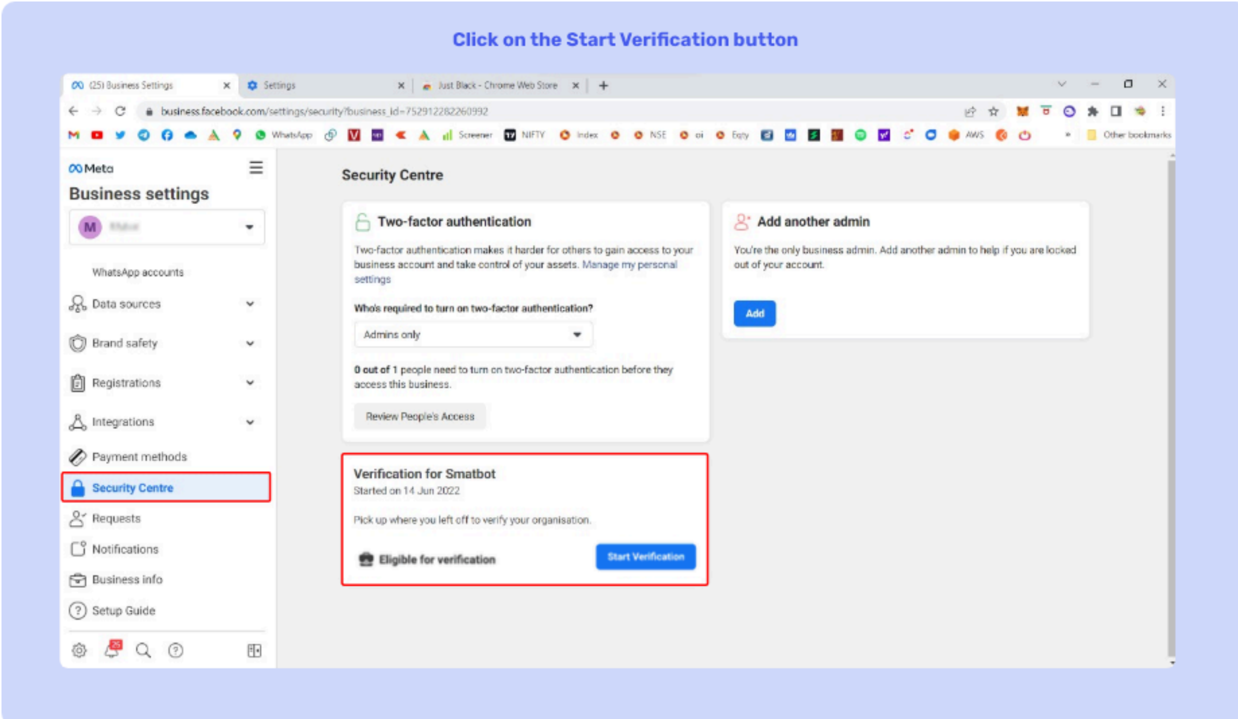


Save the changes, once done.

Step 6:

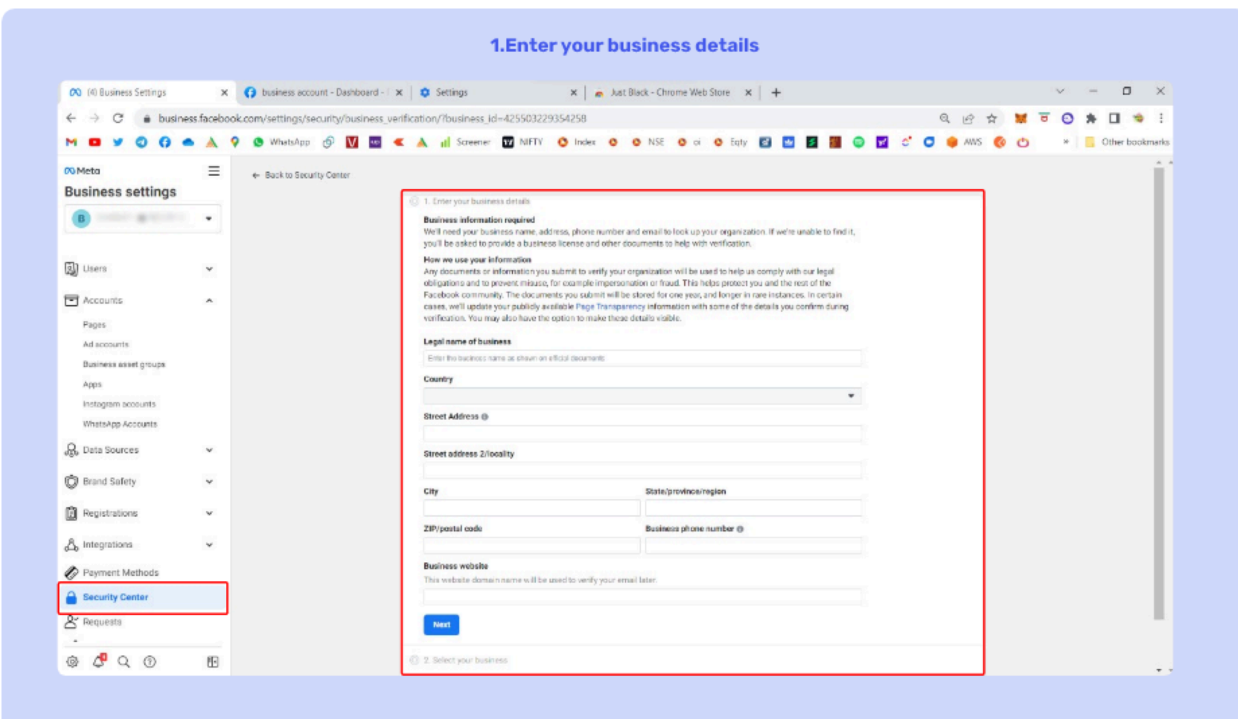
Within the Business Section, go to the Security Center. Check if the Start Verification button is enabled.

If yes, click on it.



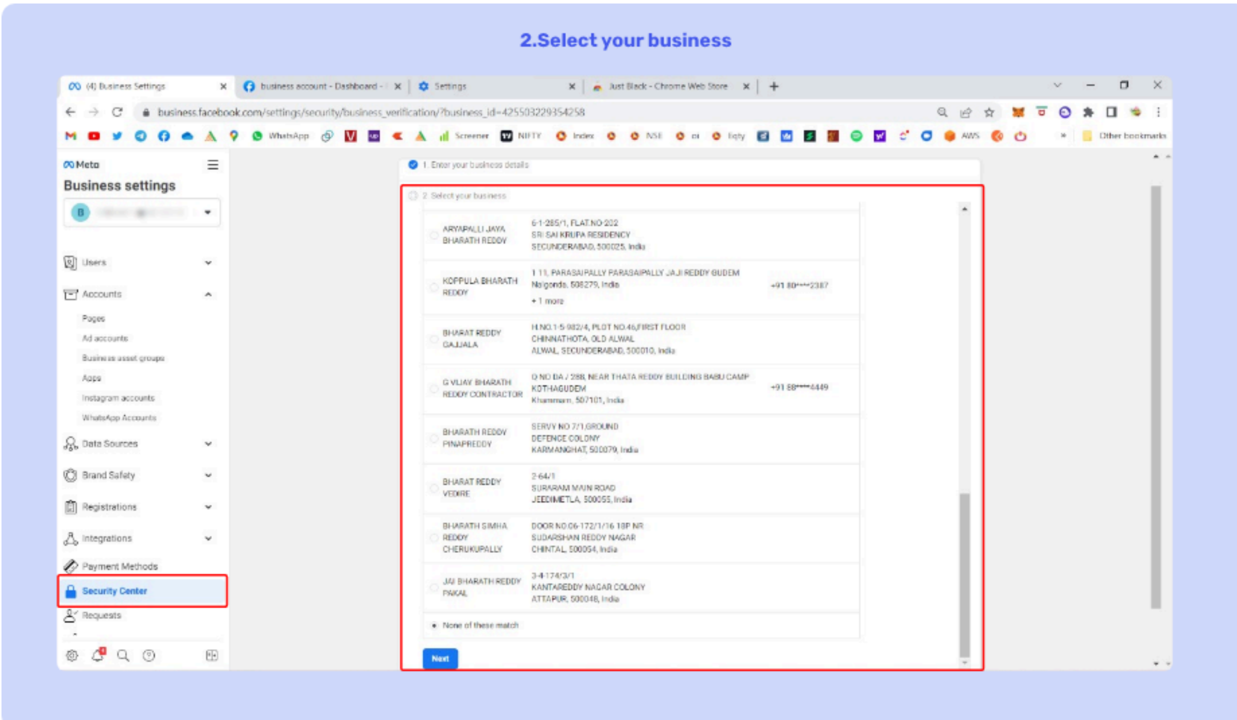
After Start Verification is enabled, select the country.

Your Business Details will appear automatically filled.



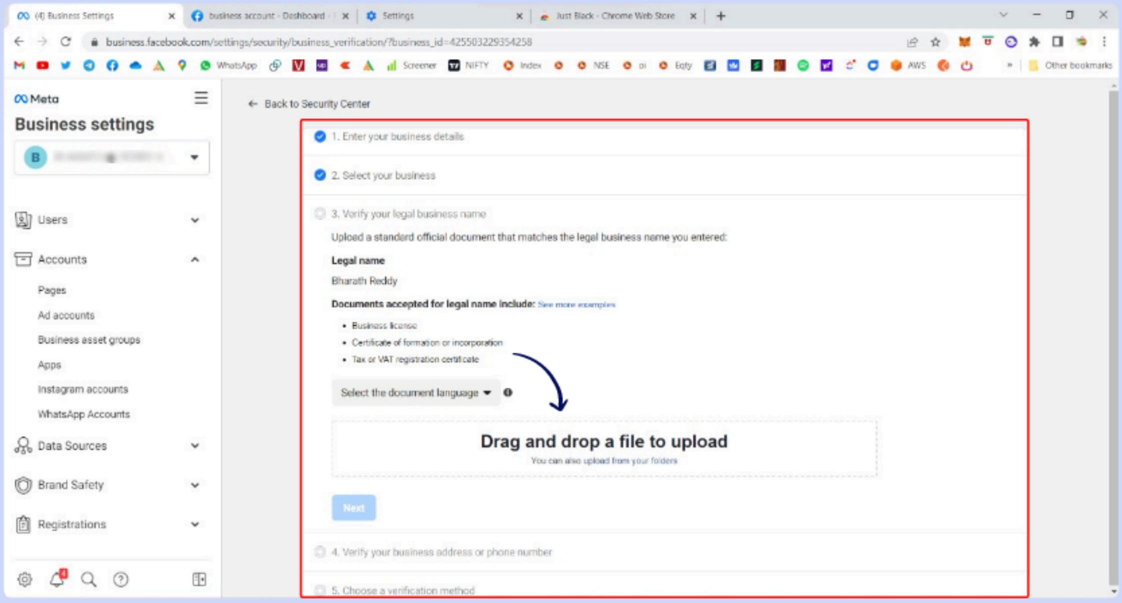
Select Your Organization :

Select the correct business from the list, or select ‘My Organization isn’t listed’ if you don’t see your business on the list.

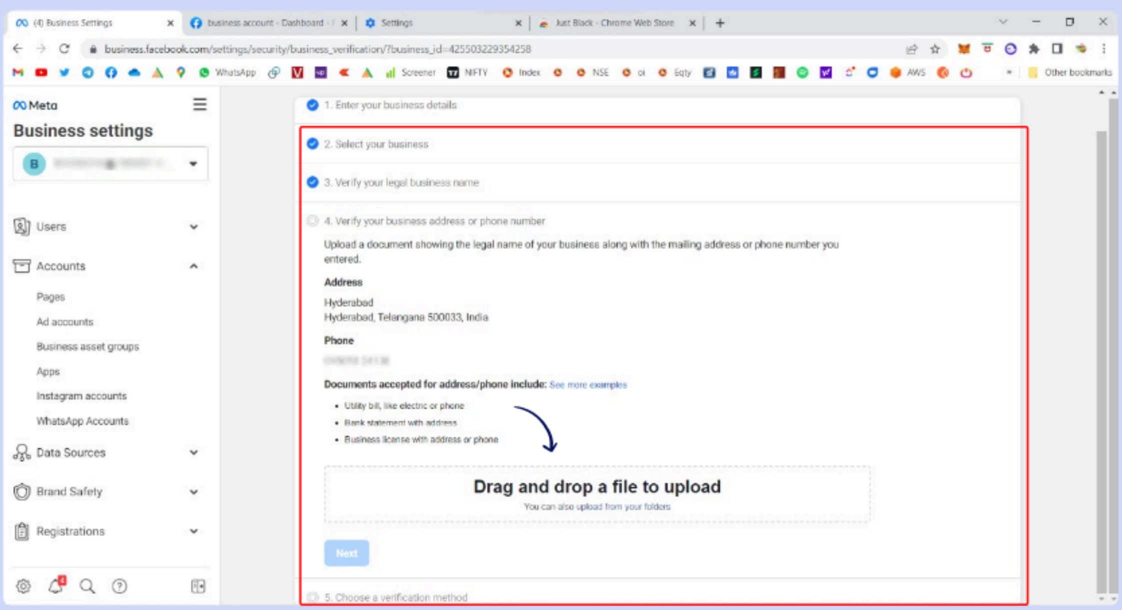


If you have selected ‘None of these matches’, learn how to upload official documents to complete the verification process.

3.Verify your legal business name



4.Verify your legal business address and phone number



What documents are required for Facebook Verification?

- In some cases, no documents are required for Facebook Business Verification. This happens because Facebook may be able to match your business against publicly available records. In this case, you will only be required to select from a list of publicly available records that Facebook shows you.

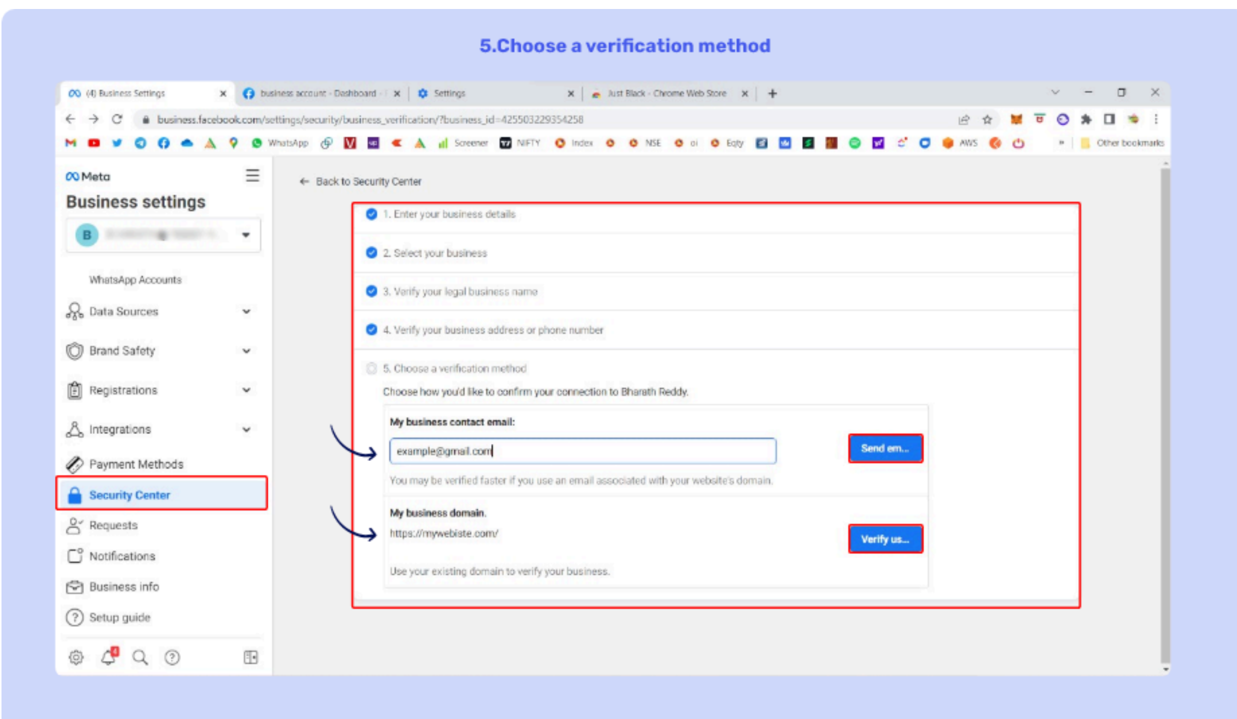
- However, if no public match is found, you will need the following documents.
-

1. **Legal Name Document (One of the following documents)**
    - Business Registration (BR).
    - Company Incorporation Certificate.
    - Tax/VAT Certificate (BR).
2. **Address Proof Document (One of the following documents)**
    - Bank Account Statement.
    - Utility Bill (Phone/Electricity Bill).

You can check the current status of your verification by going to the **Security Center. If you need any help, please contact us at support@smatbot.com**.

Step 7 :

Select a Contact Method for Verification.



You can choose Text, Email, Call or Domain Verification to Get a Verification Code.

Get a Verification Code:

You can choose to receive the verification code on your business phone number via a text message, phone call, or email. The phone number option may not be available in all countries. If you don't get the code, you can request to receive another code. If you're still having problems receiving your verification code, [learn more about how to troubleshoot.]

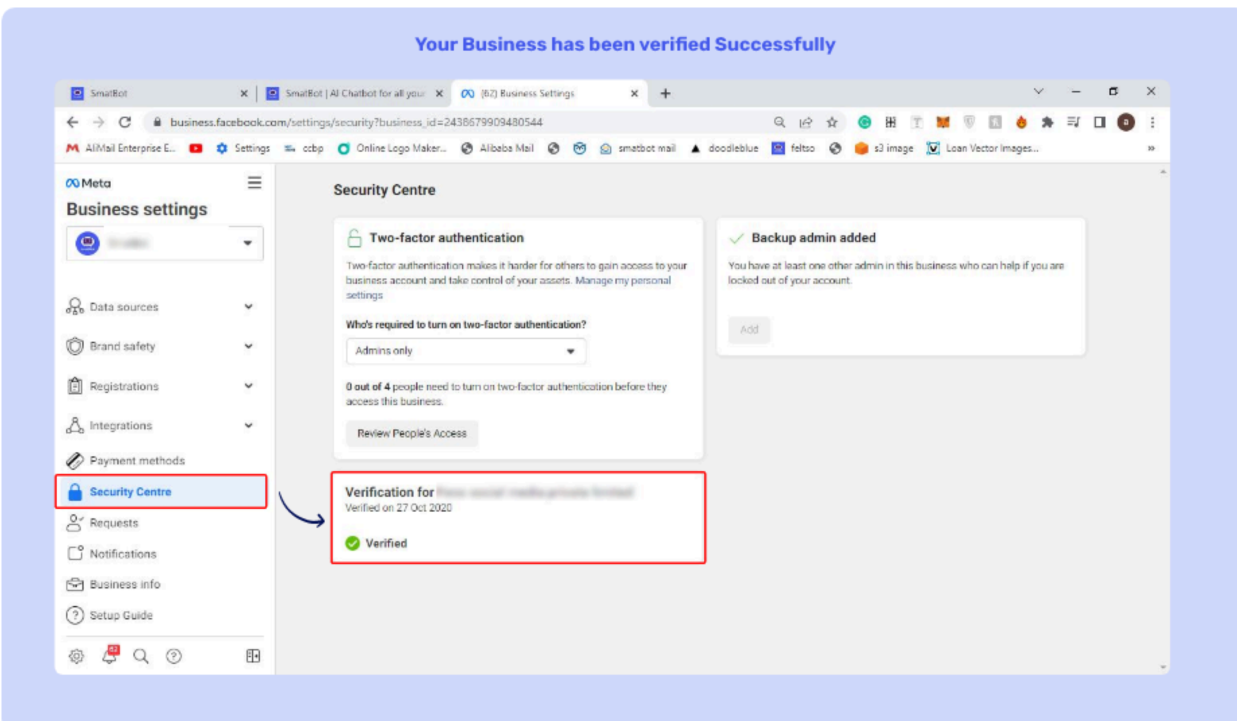
If your domain is already verified, click on '**Use Domain Verification**'.

If not, complete the domain verification process, then return to the Security Centre and click on continue. Learn when to use domain verification to verify your business.

Enter Verification Code (not applicable if you use Domain Verification)

Enter your verification code. Click on **Submit.**

Great! Facebook Business Verification has been completed.



Note: If the Start Verification button is greyed/disabled, check if the checklist below is completed.

- The Business Info section is filled as per Government documents.
- Check if the App ID is successfully copied and pasted in the App section.
- Check if your website/domain is verified in the Domain section.

- Check if the Business verification is initiated using Admin credentials. (Individual who created the Facebook Page of the Business).
- Check if you have included your Facebook Ad account.
- Check if you have added your FB Page in Pages.

How long does Facebook Business Verification take?

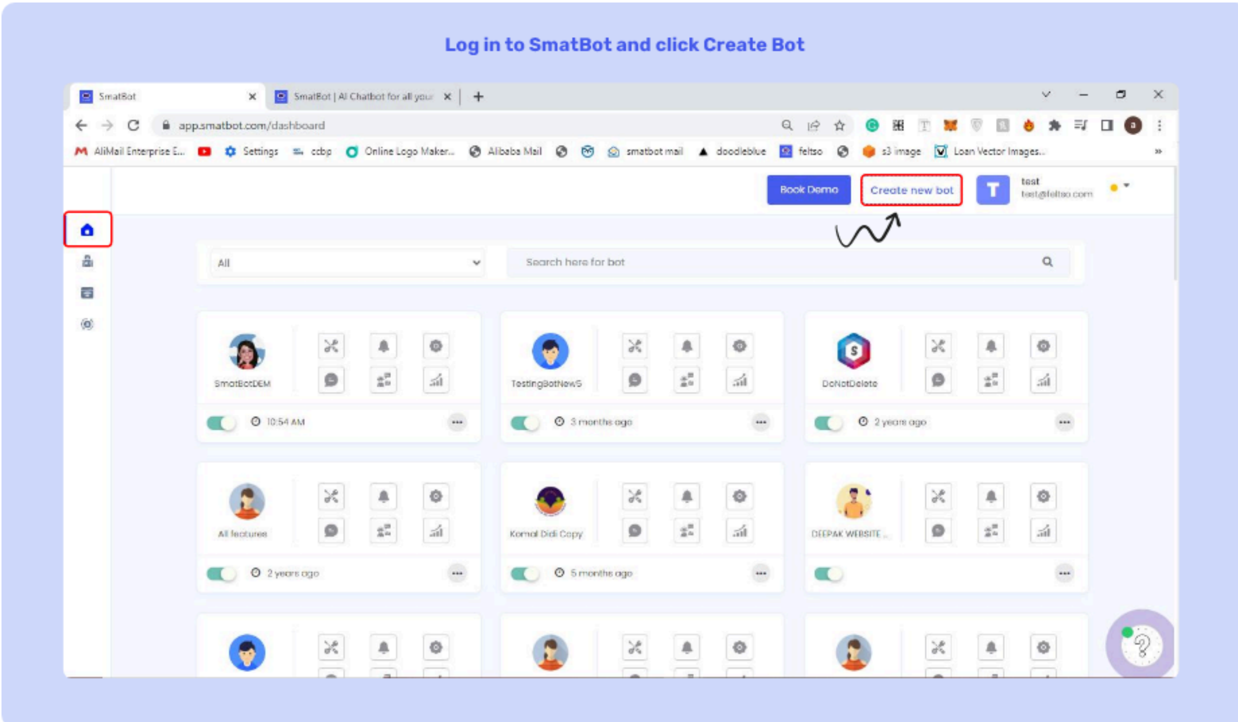
- After applying for verification, it might take 2-5 business days to get a reply back from Facebook.
- If everything aligns with Facebook policies, your business manager will get approved.

Please note that approval is not given by SmatBot and cannot be guaranteed by us. We can only help you with the process.

Facebook Installation

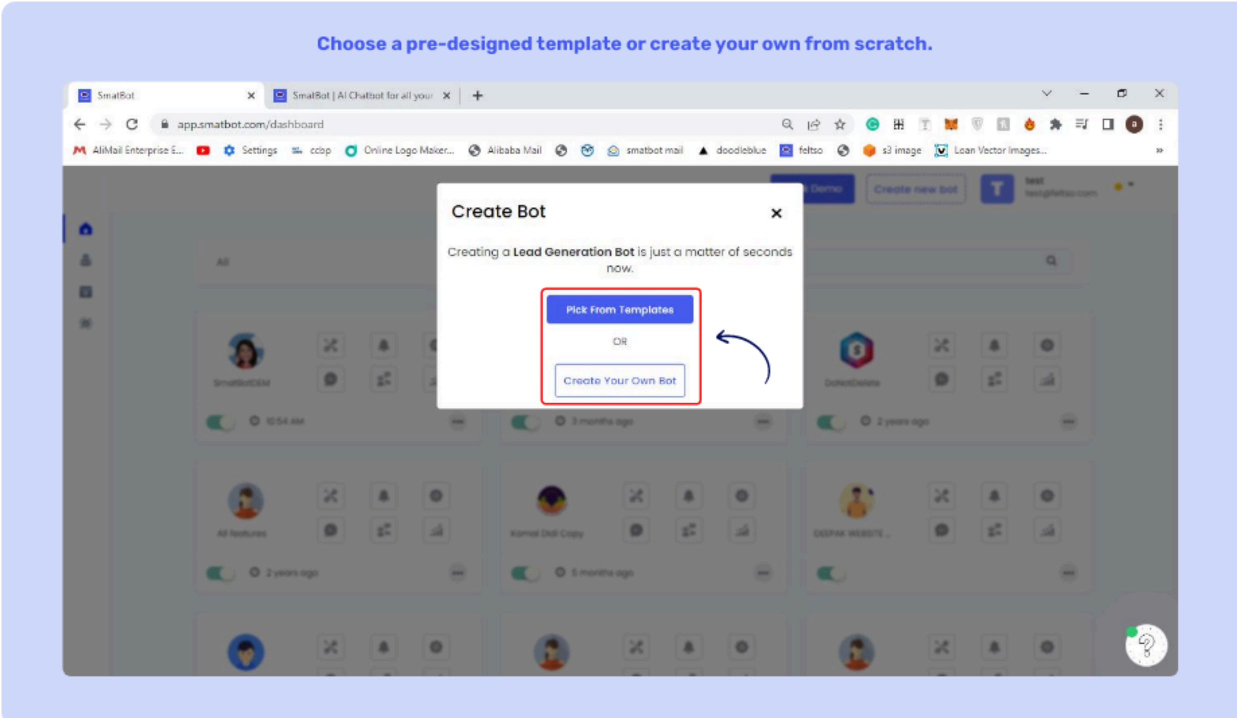
Step 1 :

Login to SmatBot account.



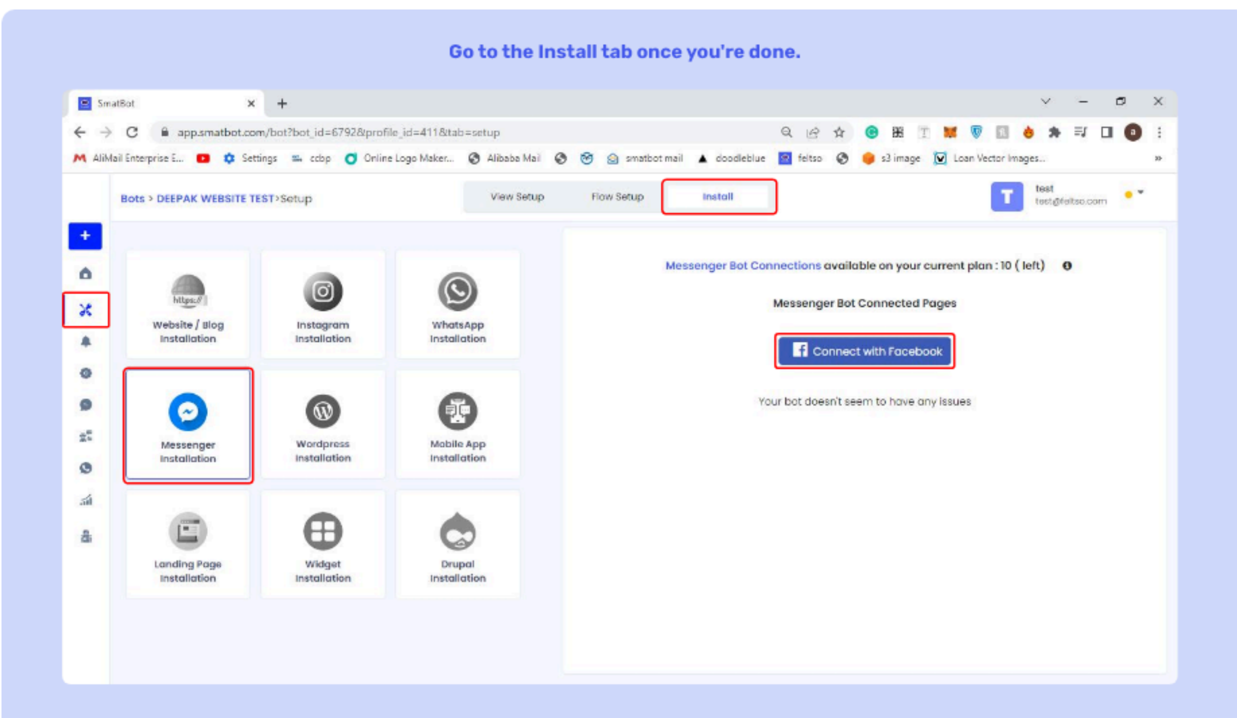
Step 2

Click on **create a new bot**. Either pick from our pre-designed templates that have been customized for your business, or create a bot from scratch. You can find the guide here.



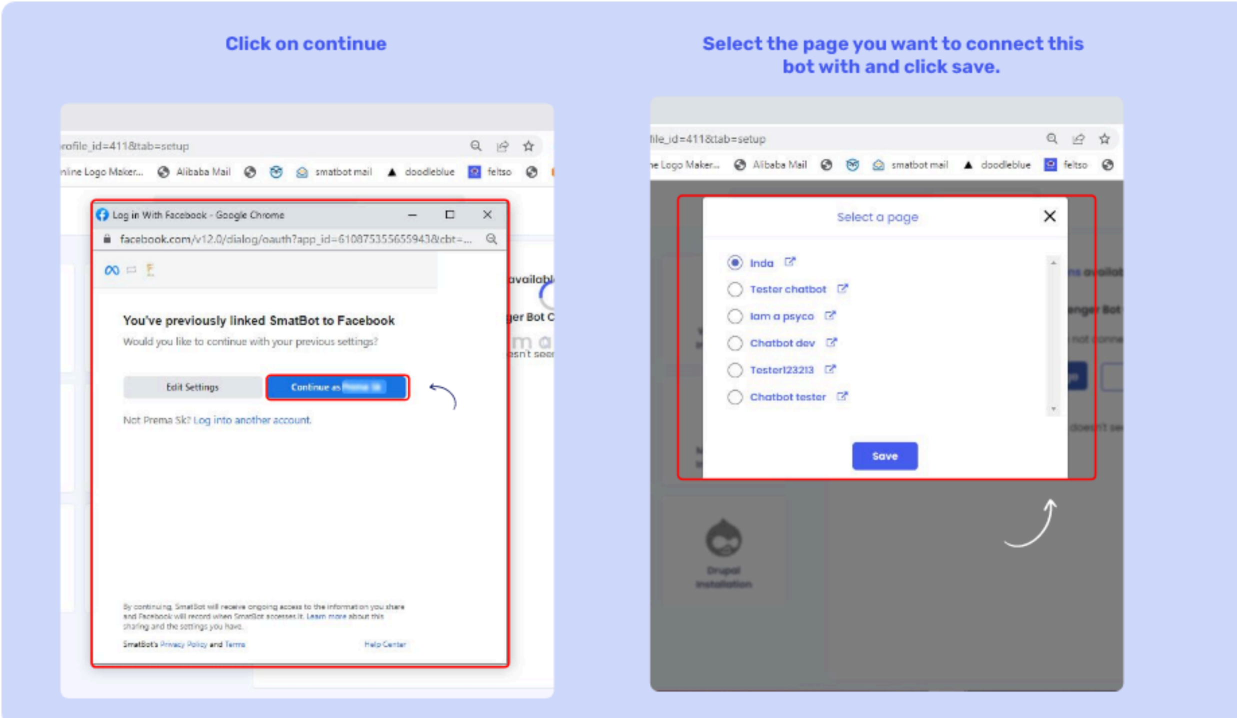
Step 3

Go to the **Install** tab. In the **Install** section, click on the '**Connect to Facebook**' tab.

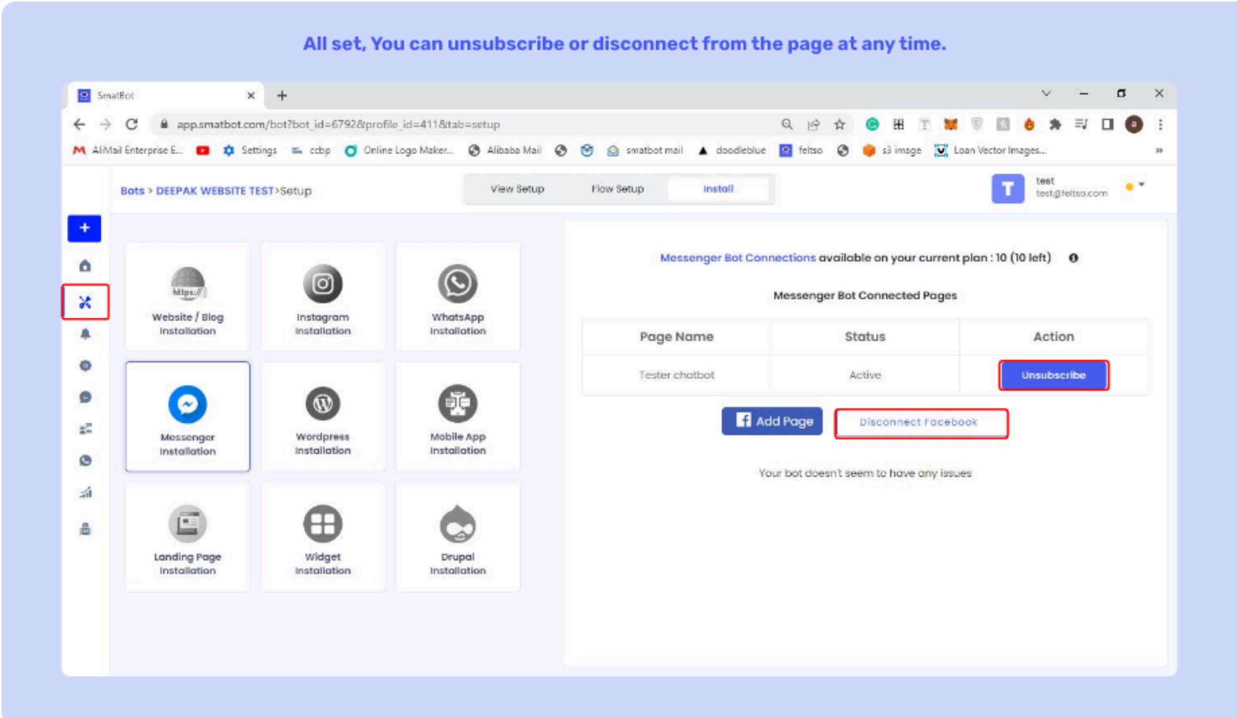


Step 4

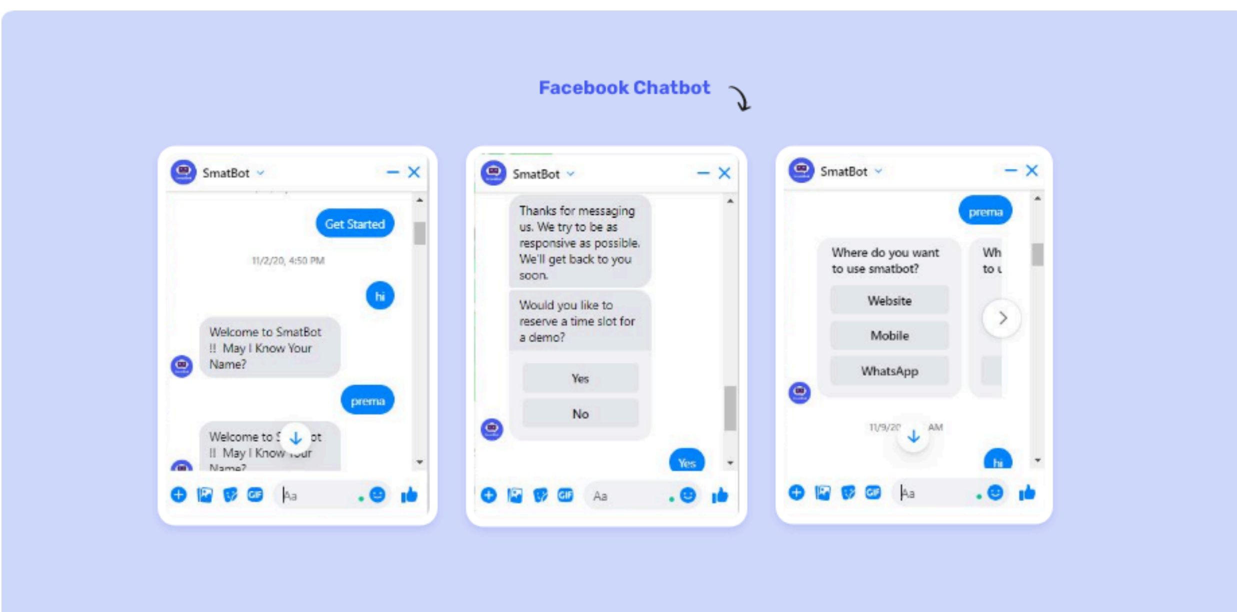
Log in with your Facebook account. Select the page you want to connect this bot with and click on **save**.



You are good to go! You can **unsubscribe** from the page or disconnect your Facebook account anytime.



Example



Best Practices for a Good UX While Creating a Facebook Bot

Note: Here are the best practices we suggest for optimal user experience.

- Use a maximum of 3 buttons in Single choice/Multiple choice (Radio Buttons).
- Keep the text in your **Radio** buttons less than 20 characters.
- Ensure that the question text in the slider type is less than 75 characters.
- Use our dedicated question types for phone, email, rating, URL to leverage the Facebook suggestion feature.
- Keep the size of GIFs below 700kb to prevent delays in response time.
- Use images with a resolution of 500*260 for a better user experience.

Please Note:

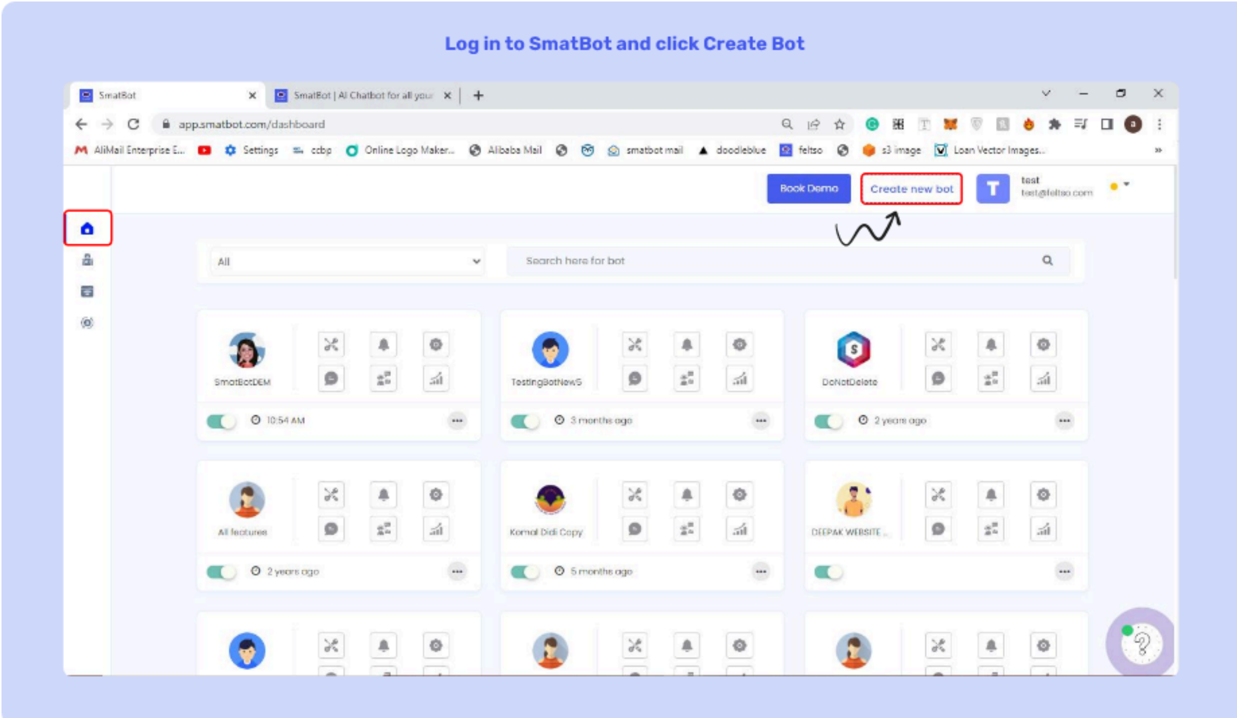
- You can only connect one Facebook page with one bot.
- You can connect one bot with multiple pages.
- You can only connect one Facebook account to a SmatBot account.
- You need to disconnect your current Facebook account connected to SmatBot before connecting a new one.

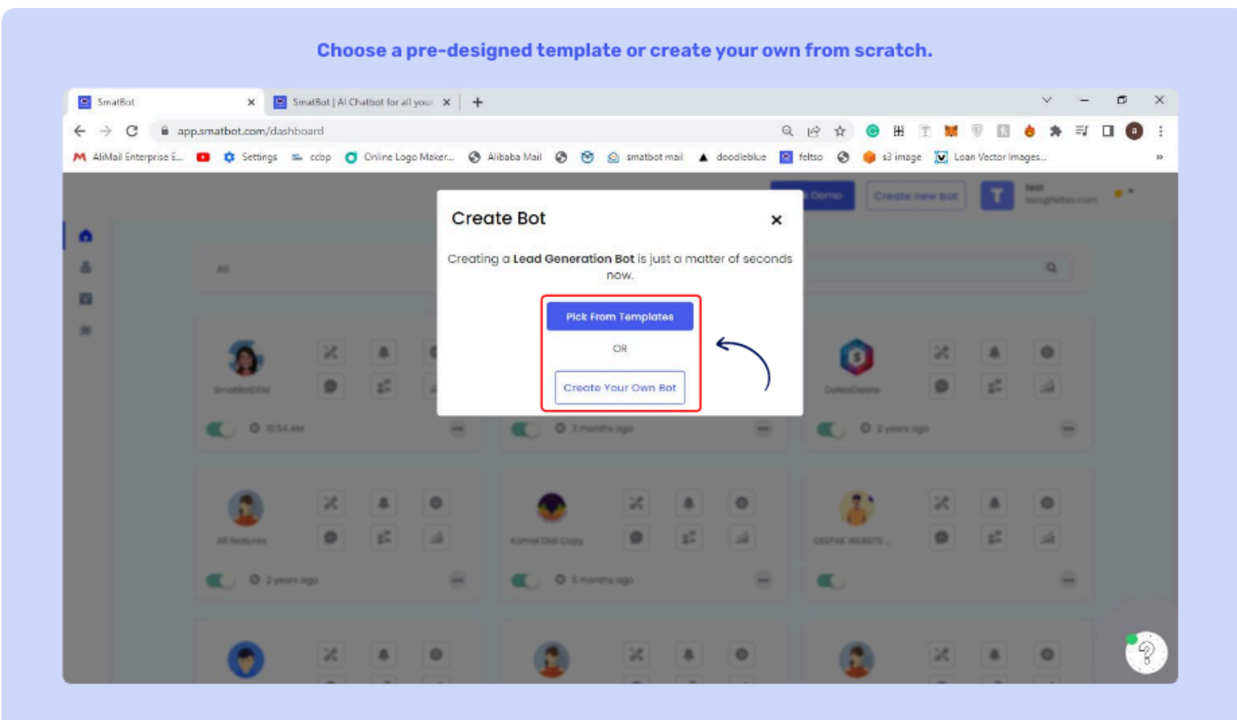
Instagram

Automate all your Instagram messages with ease. Tailor your experiences to increase customer engagement.

Instagram Bot Installation

Step 1:
Login to your SmaBot account. After setting up your bot, navigate to the Install section. Click on **Instagram Installation** and then click on the **Connect to Instagram** button.

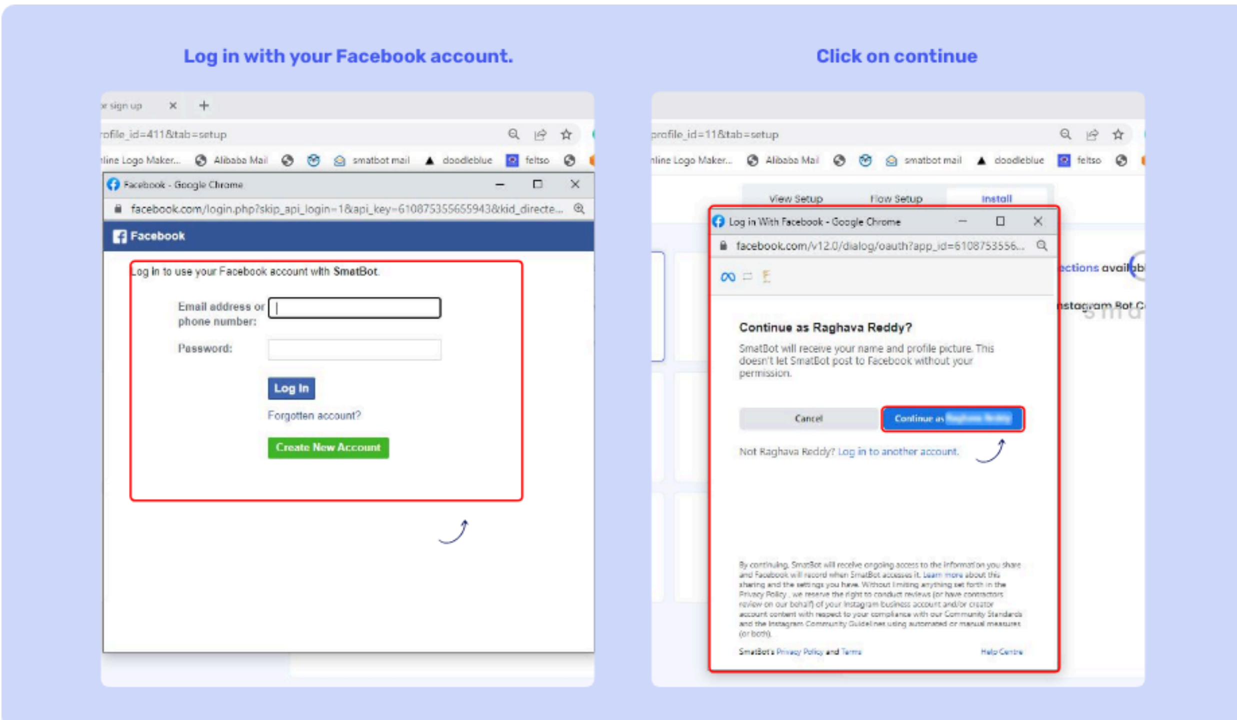




<u>Step 2:</u>
Next, login to your Facebook Business Account, to which your **Instagram Business Account** is linked. (If you have any questions with this step, please contact support@smatbot.com for help.)

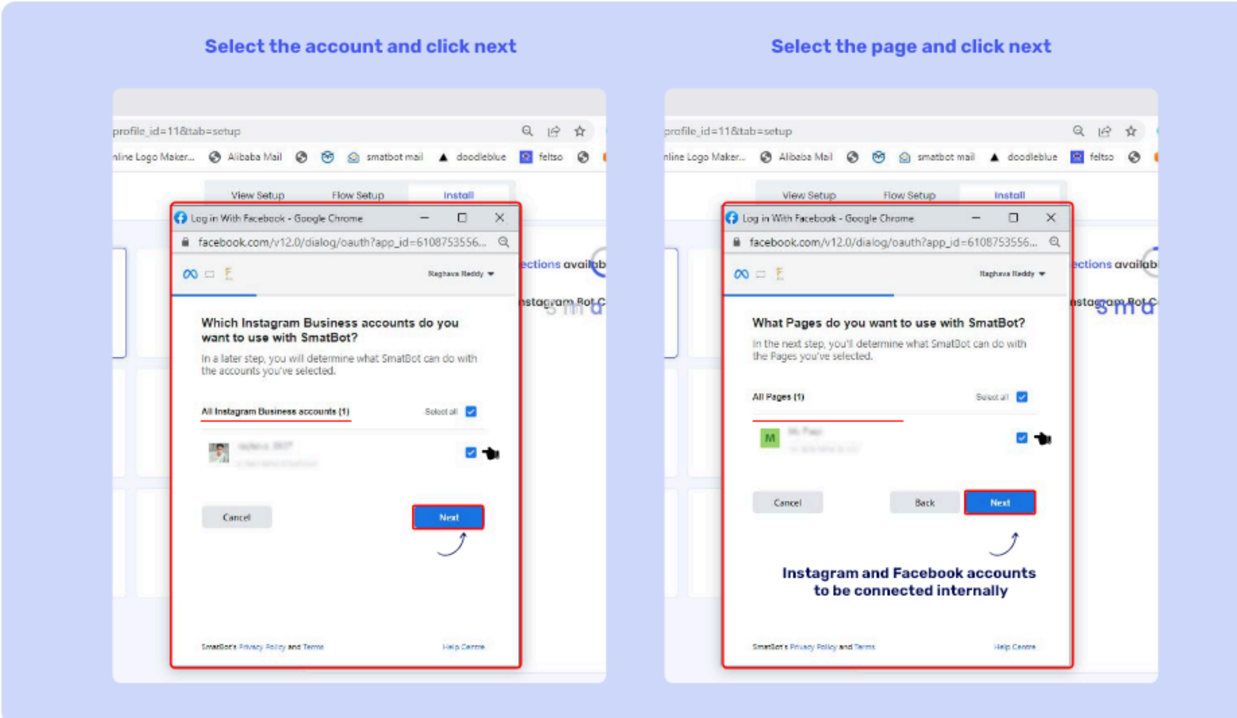
Step 3:

Next, click on Edit Settings and select your **Instagram Business Account.**



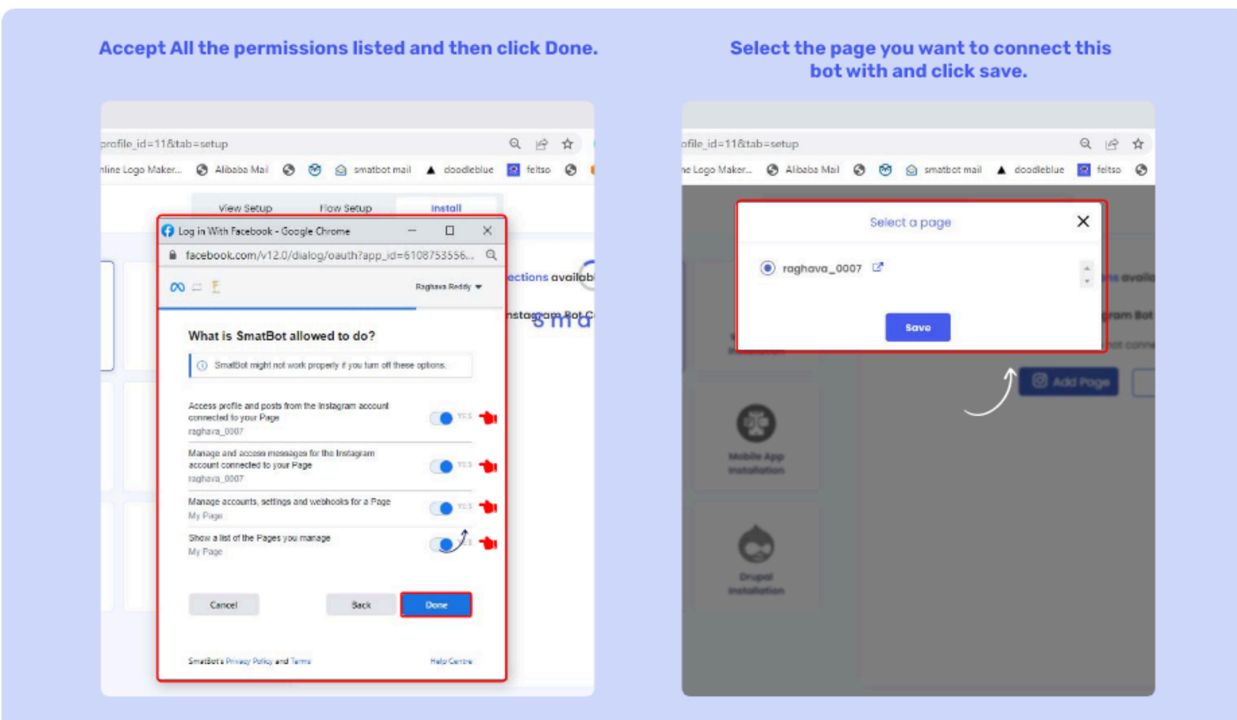
Step 4:

Select the **Facebook Page** to which the **Instagram Business Account** is connected (Please select only one page).



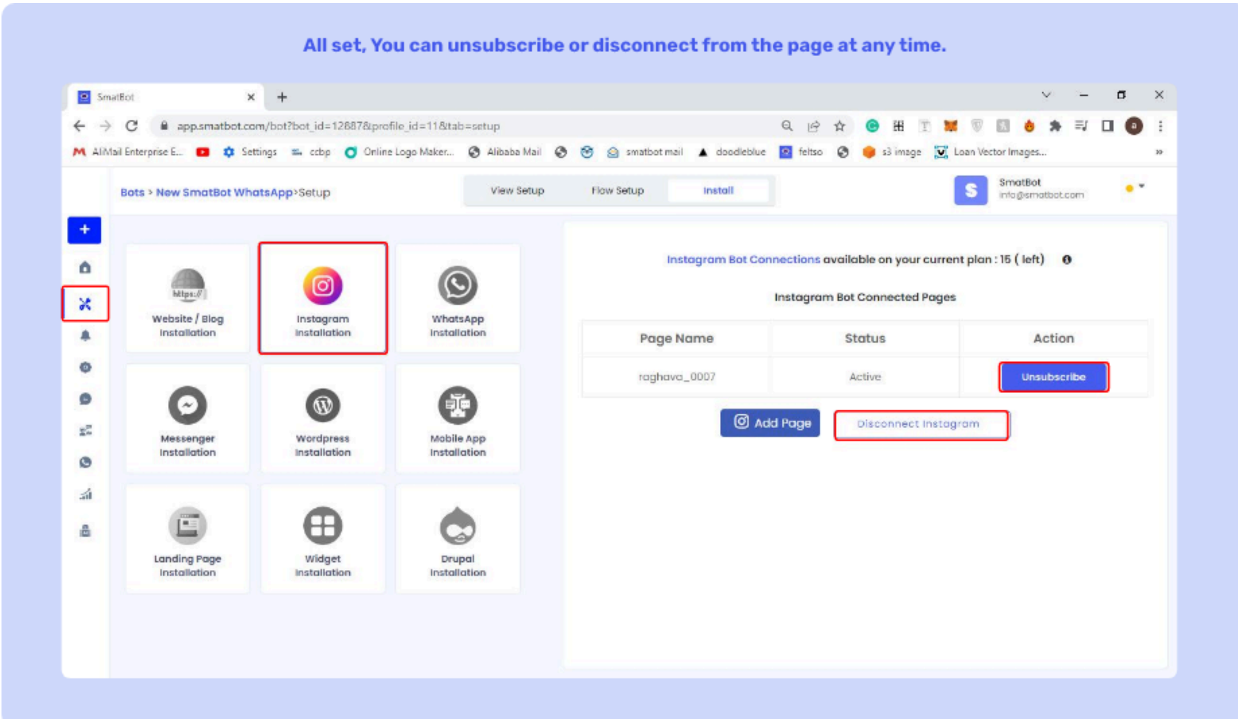
Step 5:

Give **ALL** the permissions listed and click on **Done.**



Step 6:

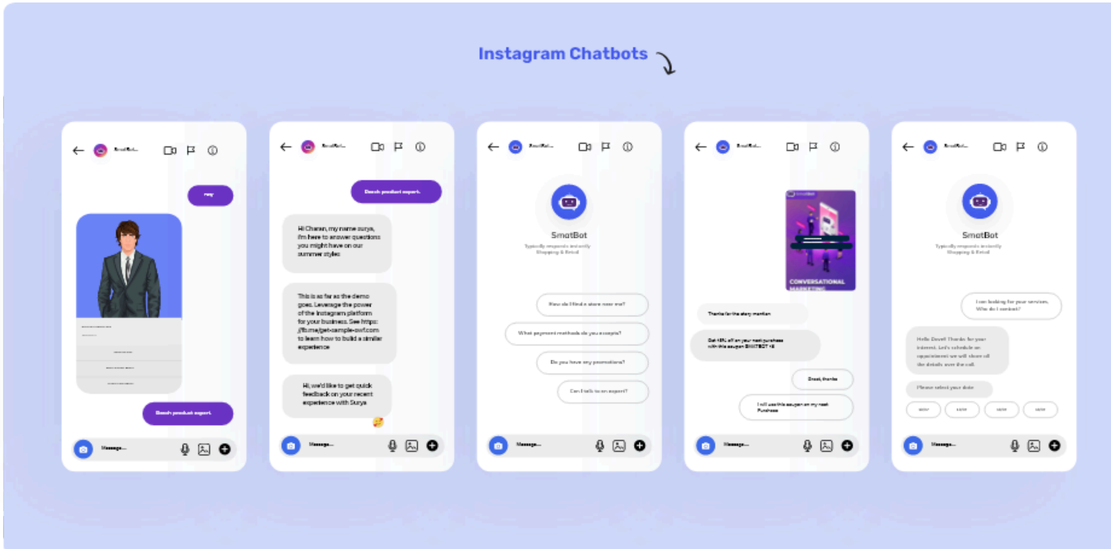
Next, select the **Instagram Business Account** to connect to the bot and click on save.



You are done! Your **Instagram Business Account** is now connected to Smatbot. If you are facing any issues, please contact us at support@smatbot.com.

Instagram Bot Specifications

Current Working Types:-

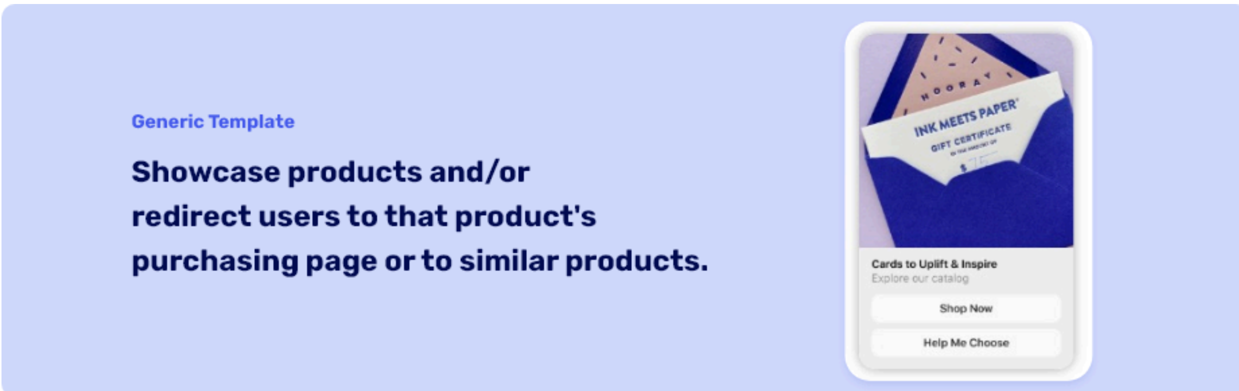


- Question
- Single Choice
- Email
- Mobile Number
- Numerical Values
- Rating
- Location
- Range
- File Upload (only images)
- Website
- Contacts
- Dynamic Questions
- Statement
- FAQ's.
- Live chat
- Generic Templates
    - Title : 80-character Limit
    - Subtitle : 80-character Limit
    - Images: 10-images Limit
    - Buttons: 3 Button Limit. 20-character Limit (each button)
- Quick Reply Buttons (horizontal scrolling buttons)
    - No of Buttons Limit : 13 buttons

- Naming : 20-character Limit (each button)

- Image Slider
  - 10 Images Limit
- Slider
  - 10 Images Limit

Generic Template : - Can be used to showcase products and/or to redirect users to purchase that product or to explore similar products.



Specifications of Generic Templates

- Title : 80-character Limit
- Subtitle : 80-character Limit
- Images: 10-images Limit
- Buttons: 3 Button Limit. 20-character Limit (each button)

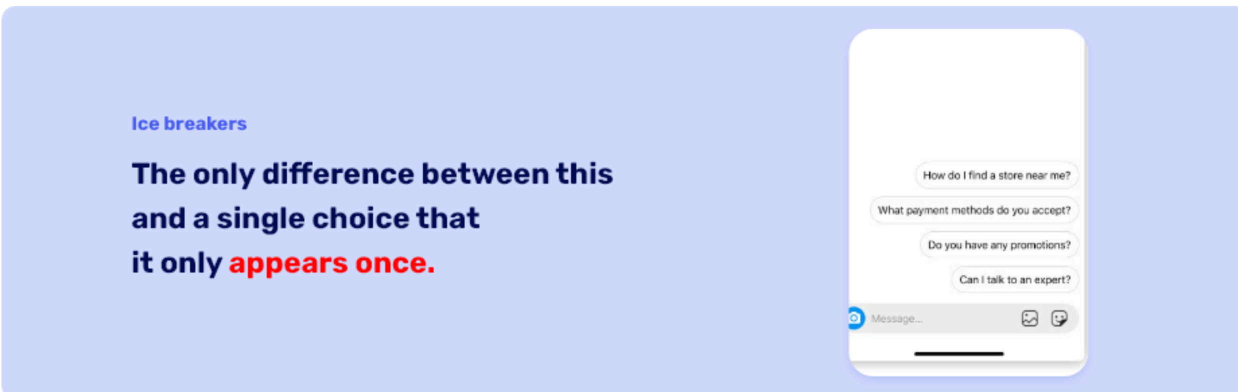
Quick Reply Buttons

Limits :

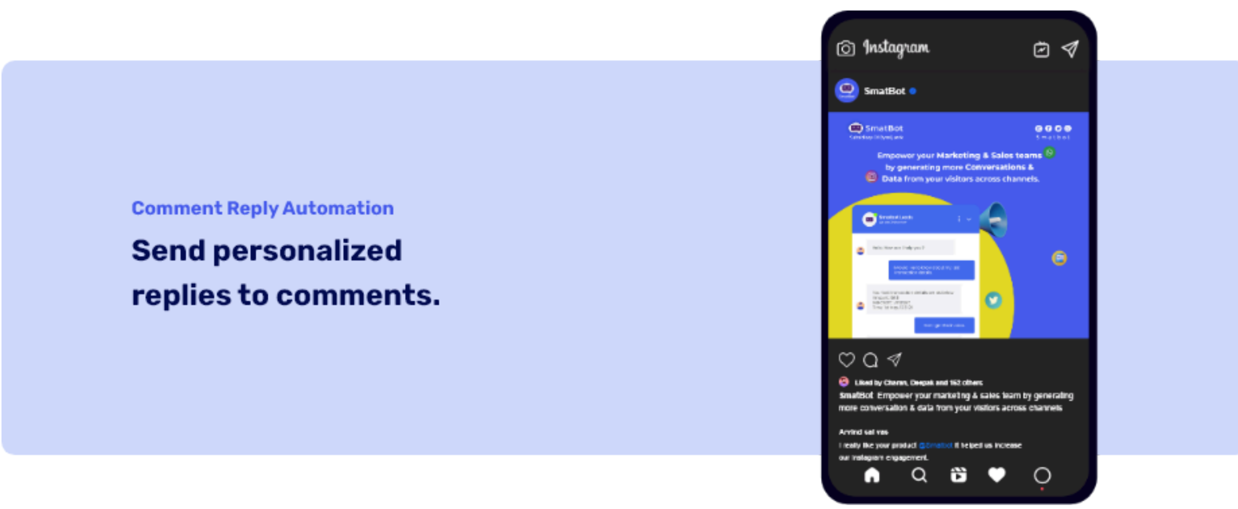
- No of Buttons Limit : 13 buttons
- Naming : 20-character Limit (each button)

Appointment Booking :- Automate booking appointments through Instagram. Note: This feature is coming soon.

Ice Breakers



Comments Automation :



WhatsApp Cloud API

- The WhatsApp Cloud API is now available to all enterprises without charge, according to Meta (formerly Facebook). This will spare enterprises the expense of "Hosting" the API and let them access all of WhatsApp Business API's features.

What Is WhatsApp Cloud API?

WhatsApp Cloud API is the 2019-released WhatsApp Business API from Meta that runs in the cloud.

All businesses across the world may now launch WhatsApp Business much more easily thanks to the new cloud-based API.

Previously, organizations had to go through WhatsApp Business Solution Providers in order to obtain the WhatsApp Business API, which was a time-consuming process (BSPs). With the help of a secure cloud-hosted WhatsApp API, any company or developer can now simply use WhatsApp APIs, adapt them as needed, and reduce the time it takes to respond to clients.

WhatsApp Business On-Premises API vs. Cloud API Differences

1. Cloud API can be accessed directly from Meta for free, but WhatsApp Business API must be accessed via BSPs.

2. Companies do not have to pay for hosting and maintaining the cloud API.

3. Companies can directly utilize the Cloud API for free thanks to Meta.

Both solutions' features are identical in every way.

Benefits of the WhatsApp Cloud API include:

- Integrate WhatsApp messaging with third-party apps, CRM software, and analytics software.
- Verified WhatsApp Business profile with a Green Tick
- WhatsApp Bulk & Broadcast Messaging
- Use BSPs or CRM instead of an app or interface.
- Using third-party applications, WhatsApp Chatbot and chat automation
- Schedule numerous WhatsApp messages in advance.
- List messages, reply buttons, and CTA messages are examples of interactive messaging features.

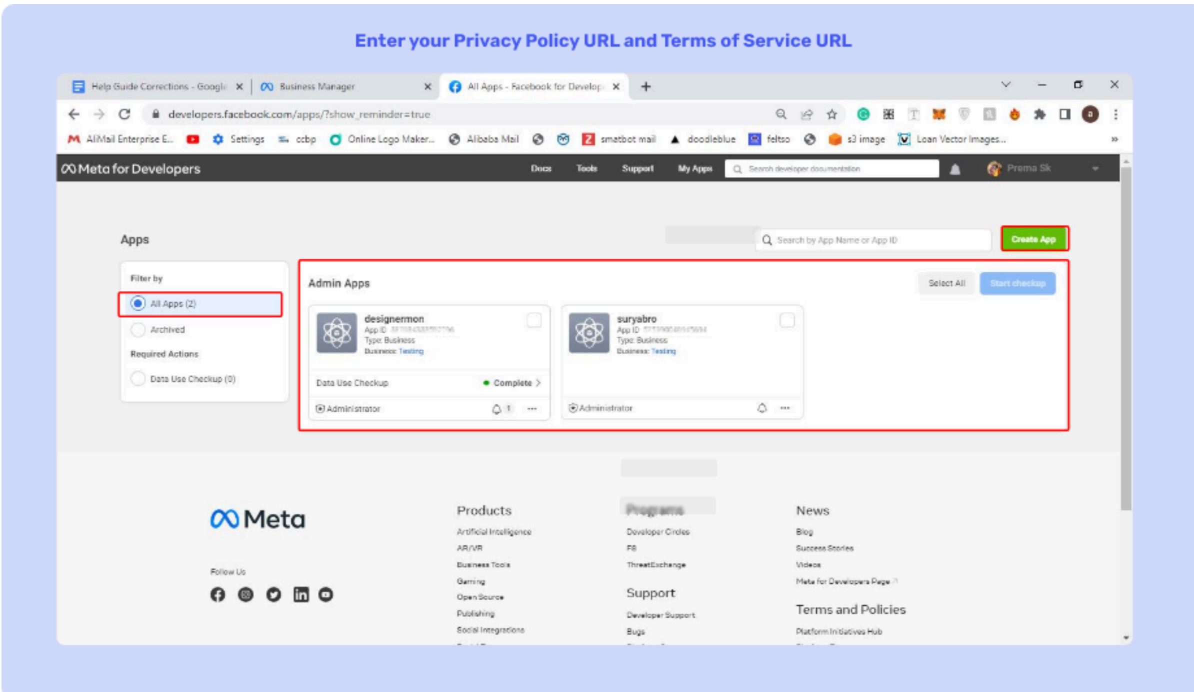
How To Get WhatsApp Business Cloud API

If you’re a business owner or a developer you can **Get Started with WhatsApp Cloud API For Free**

Step 1:

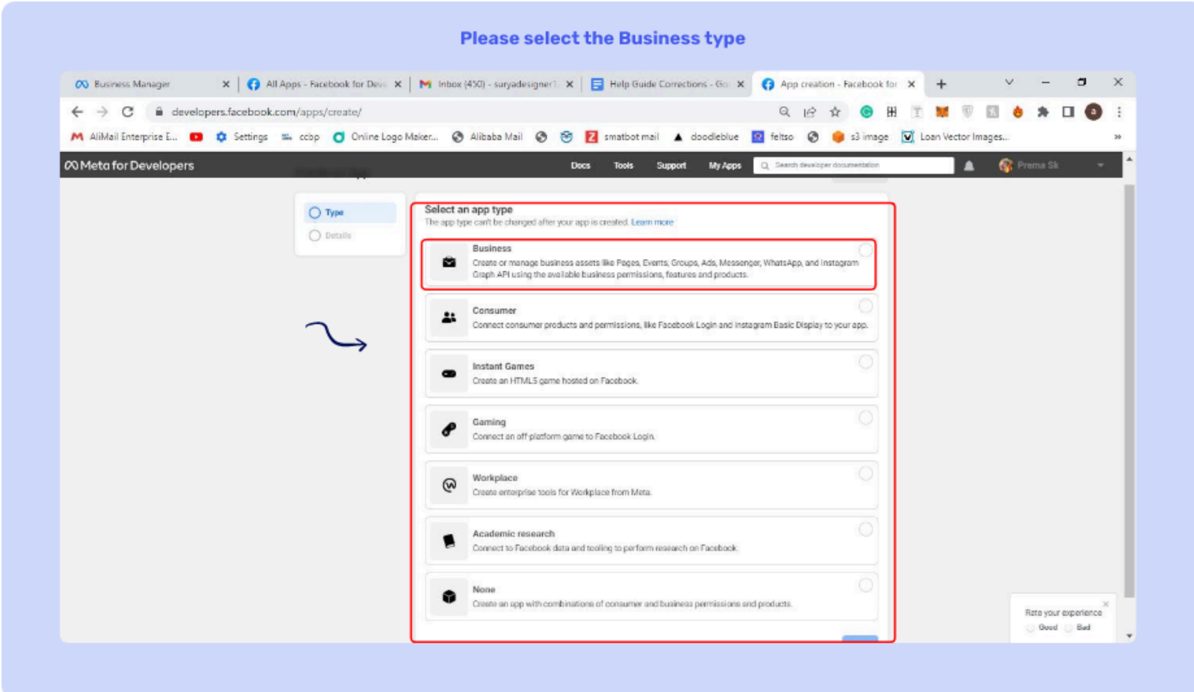
Go to developers.facebook.com and select My Apps.

Click on Create App.



Step 2 :

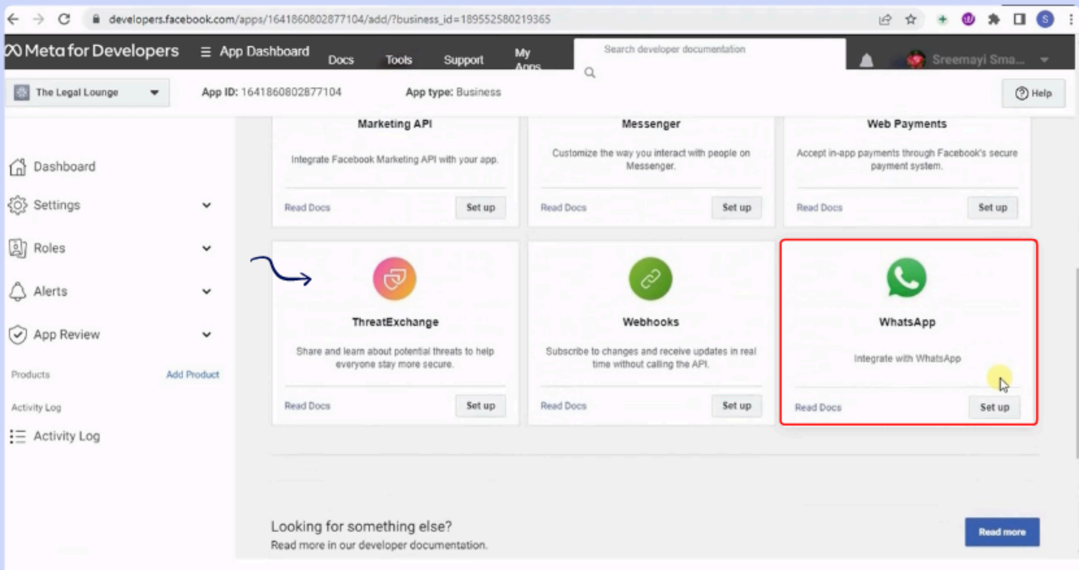
- Select **Business** as the app type and proceed.

- 

- Provide the display name and choose the business account for which the app should be connected.

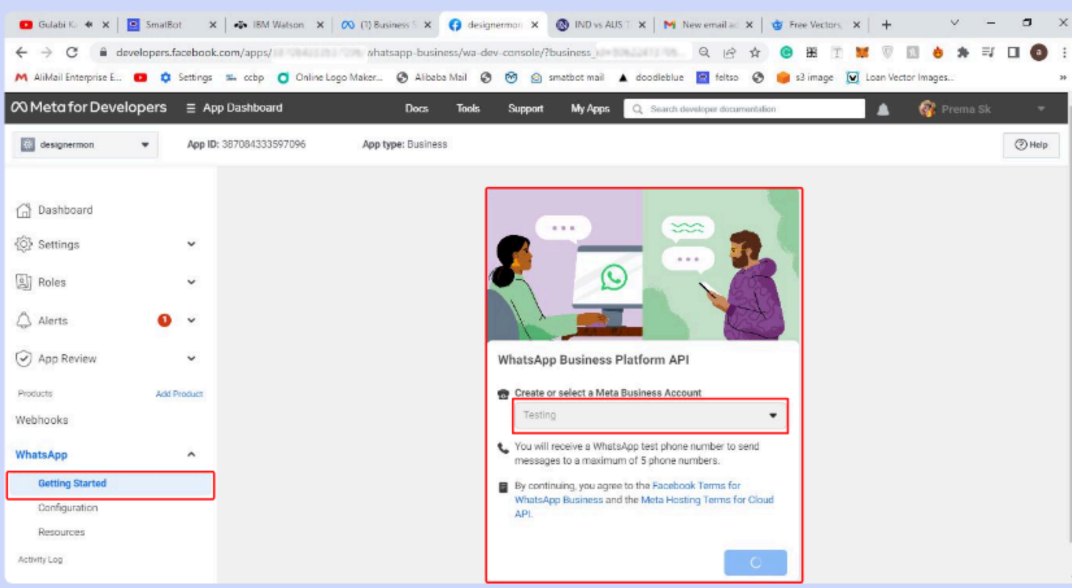
  Note : Avoid using trademarked names such as "WhatsApp" or "Facebook" for your app name.
- Once done, click on **create app** and enter your password.
- Once the home page is displayed, click on the **WhatsApp setup** button.

Click on set up Whatsapp

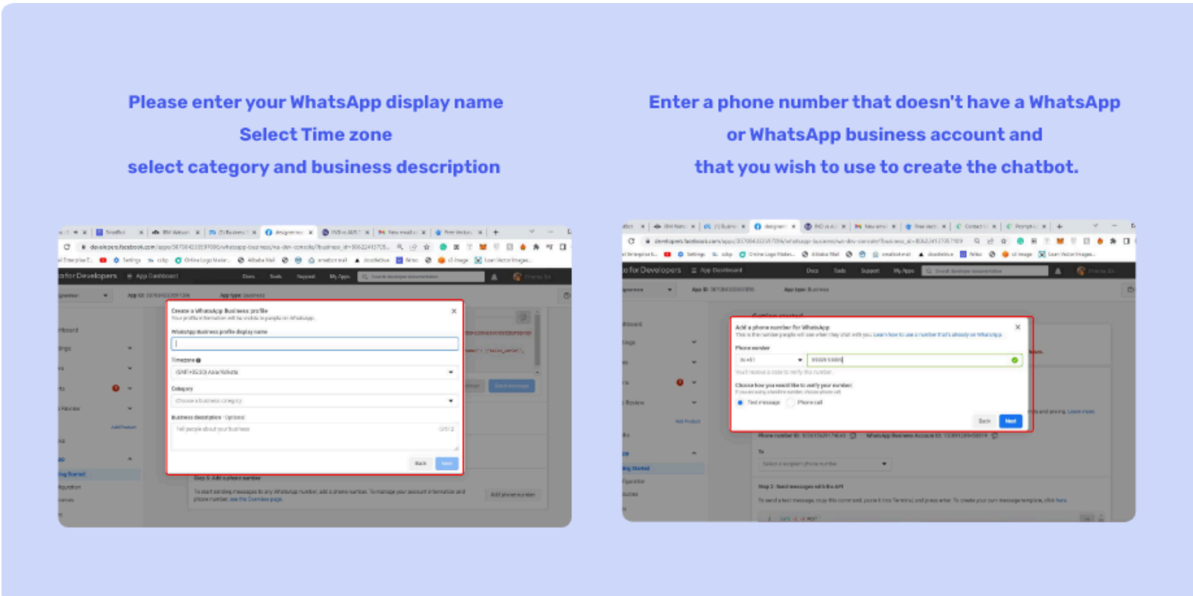


- Select create a business account from the list and click on continue.
- In WhatsApp, navigate to getting started and click on **add phone number**.

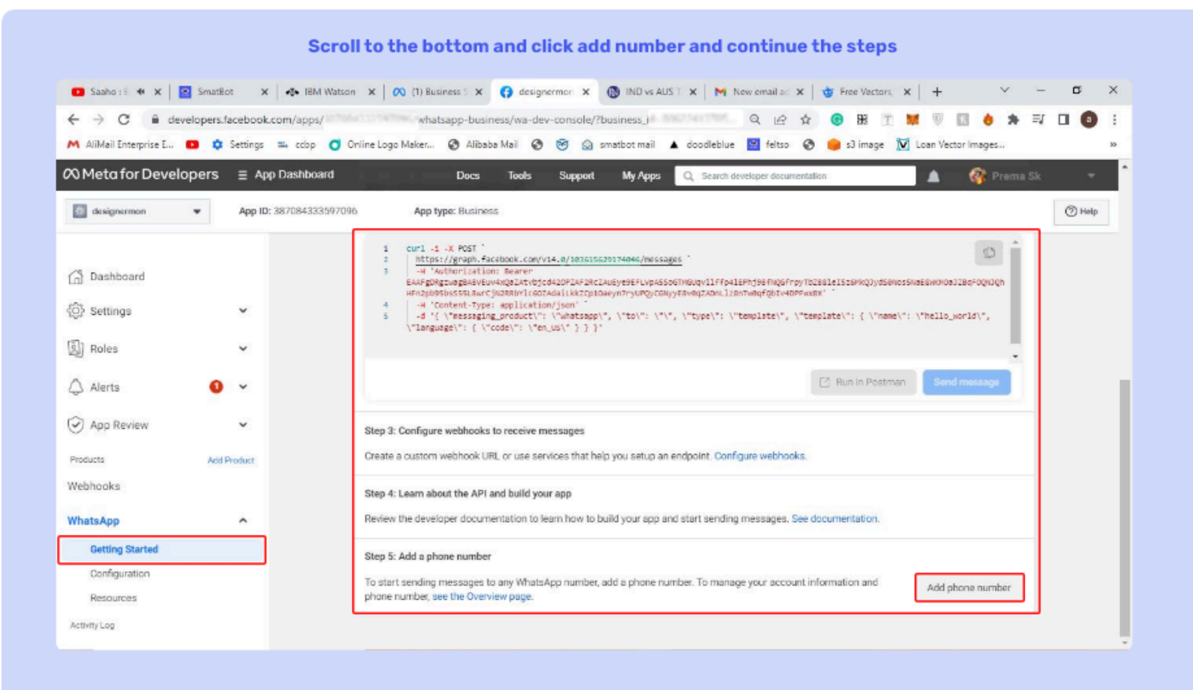
Select the meta business account and continue the steps



- Next, create a WhatsApp Business Profile with display name, time and category. Click on next.

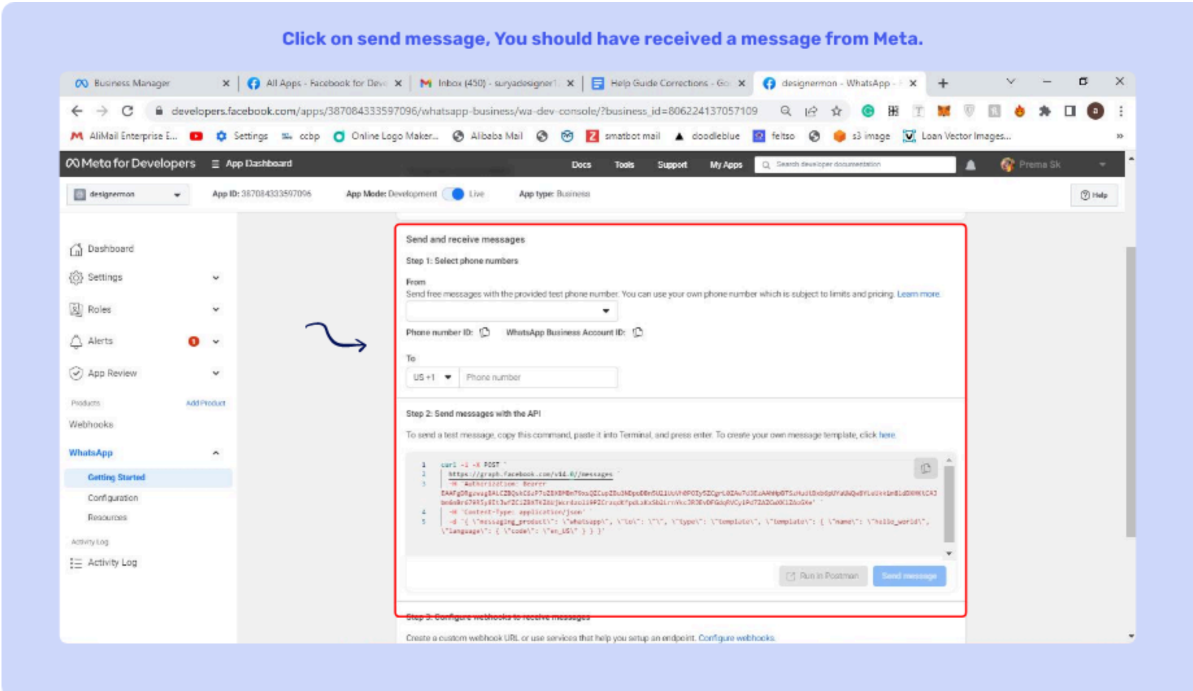


- Add phone number and click on next to get a verification code.



- You will receive a 6 digit OTP on the WhatApp number your provide. Enter that OTP when prompted.

- Once the verification coded is added, jump to step two and click on send message.



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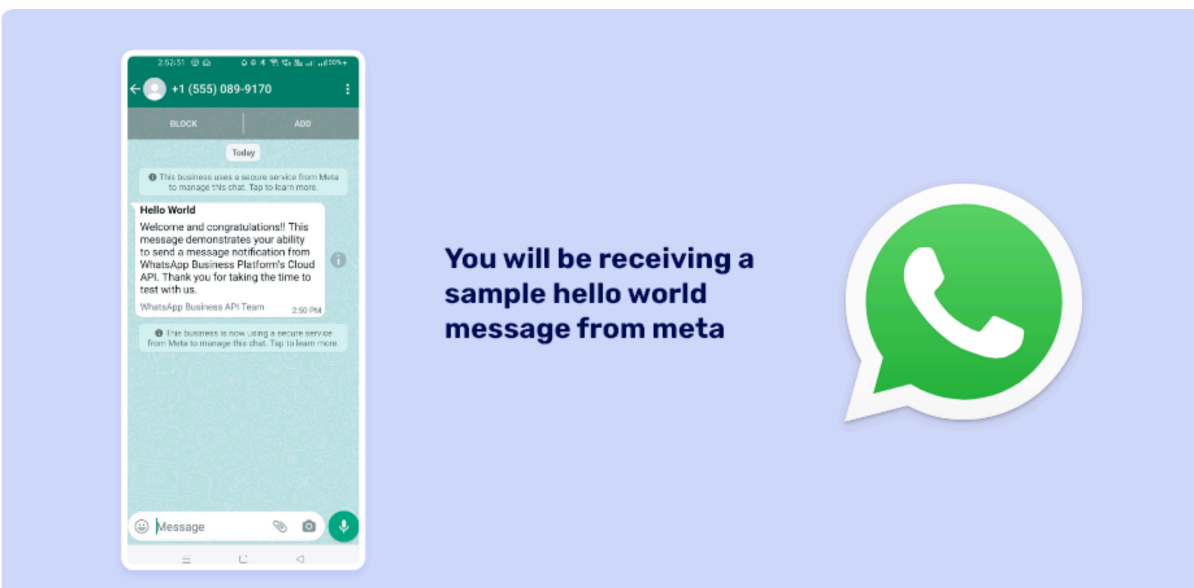
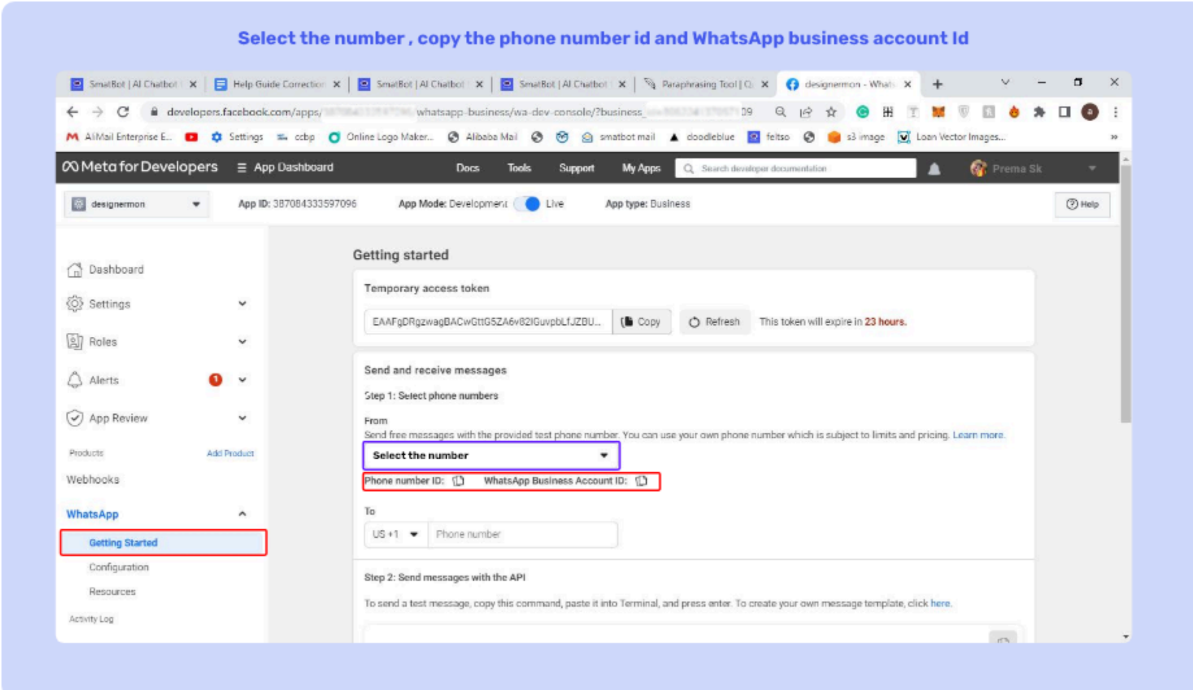
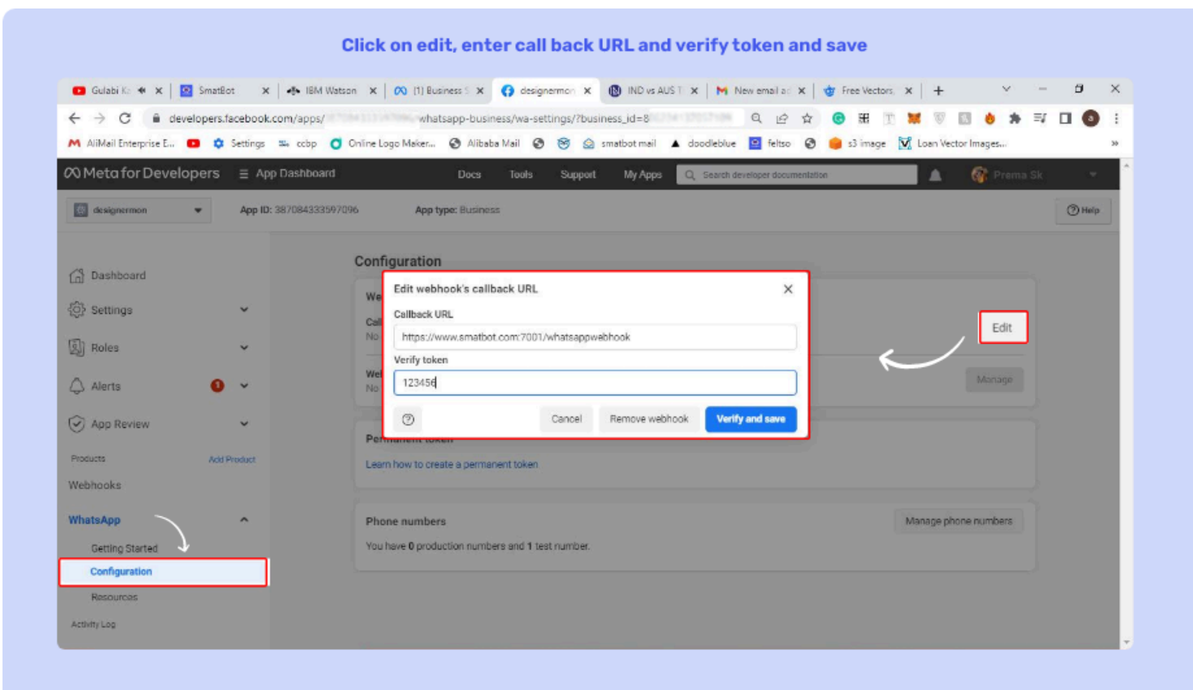
- Next, check your WhatsApp. You should have received a message from Meta.



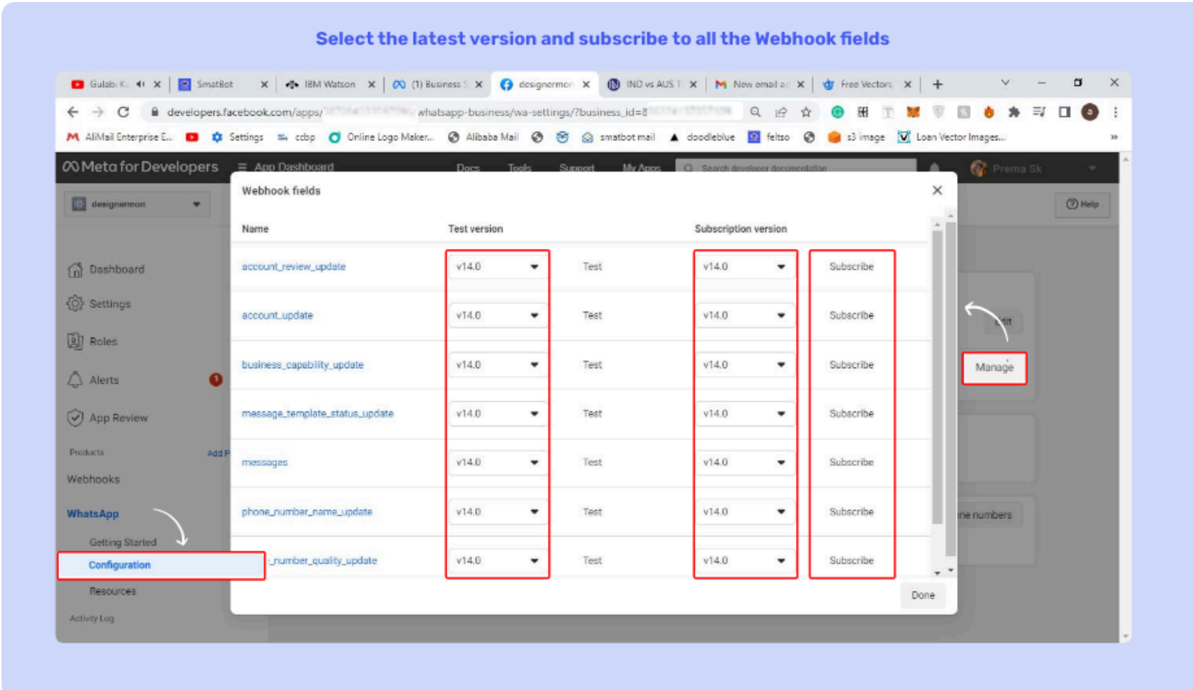
- Copy phone number ID, WhatsApp Business Account ID and save those details.



- Next, click on configuration, and edit the fields.
- Add your callback URL and **verify the token.**



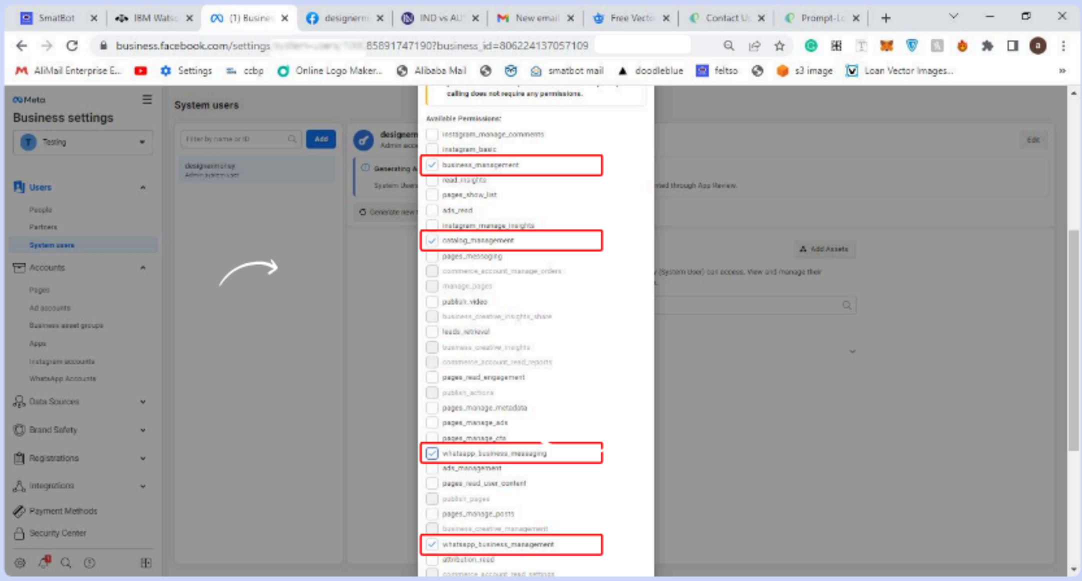
- Next, click on manage and add the 15.0 version and **subscribe** to all the webhook fields.



- Go to business settings.
- In users, click on **Generate New Token** and then click on the FB page.

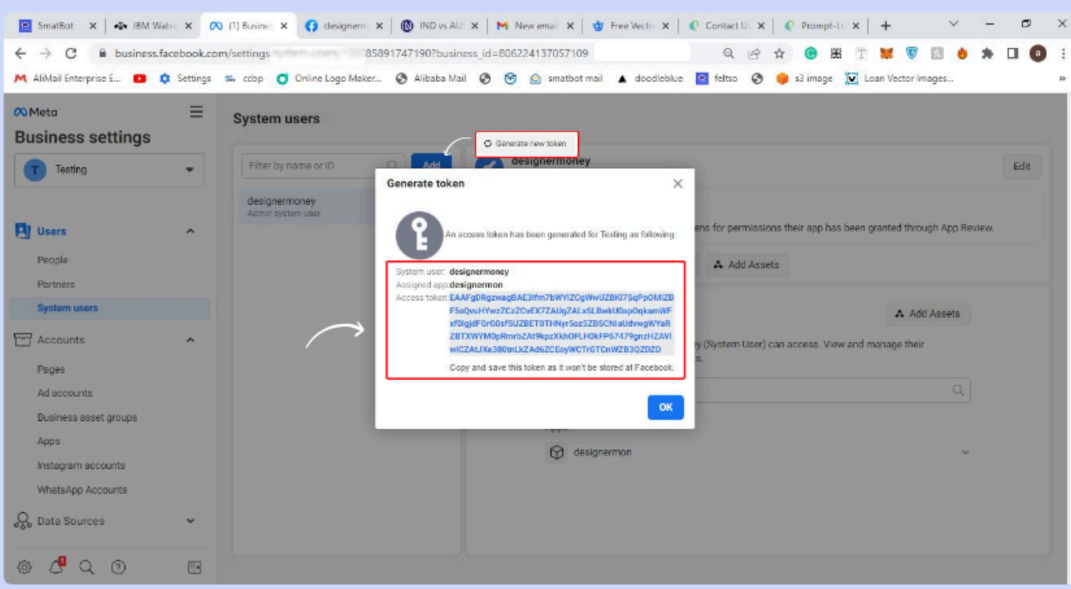
- Select your app from the list and select the following options:
    - Business_management, Catalog_management, Whatsapp_business_messaging, Whatsapp_business_management.

Select business_management, catalog_management, whatsApp_business_messaging, whatsApp_business_messaging



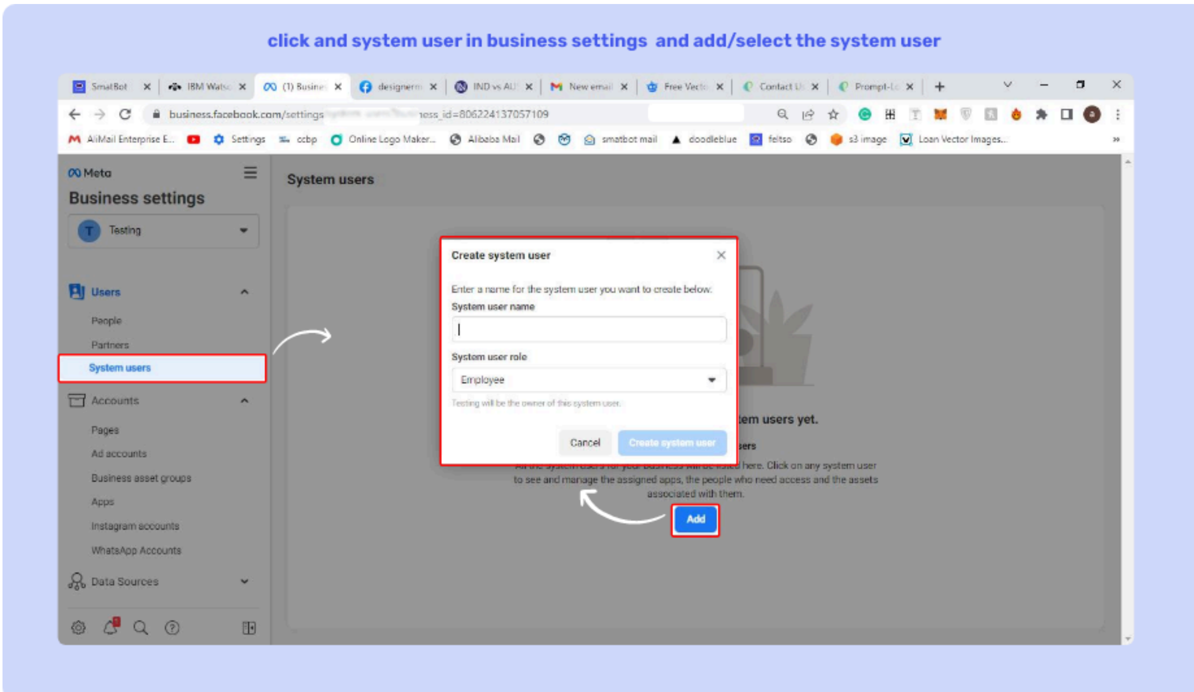
- If you are looking for Instagram, select the Instagram related options as well.
- A token will be generated.

Generate the access token and copy to your notepad or clip board for later use

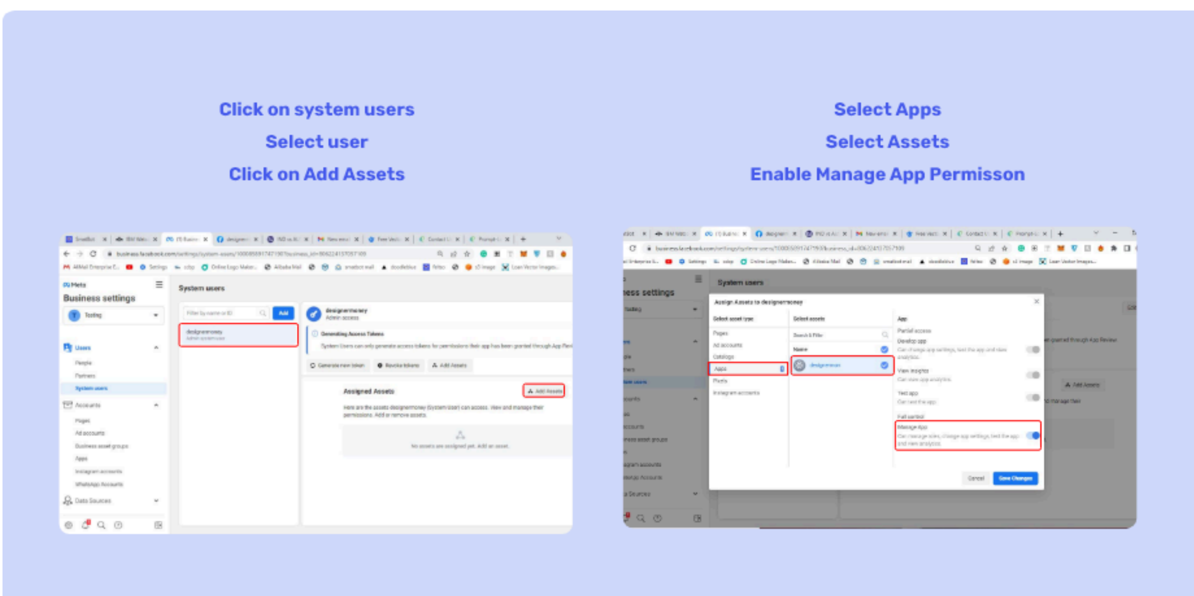


- Next, copy the token generated and save it for future use.

- Within the same the Business Settings, Select System Users to add System User Name and System Role.

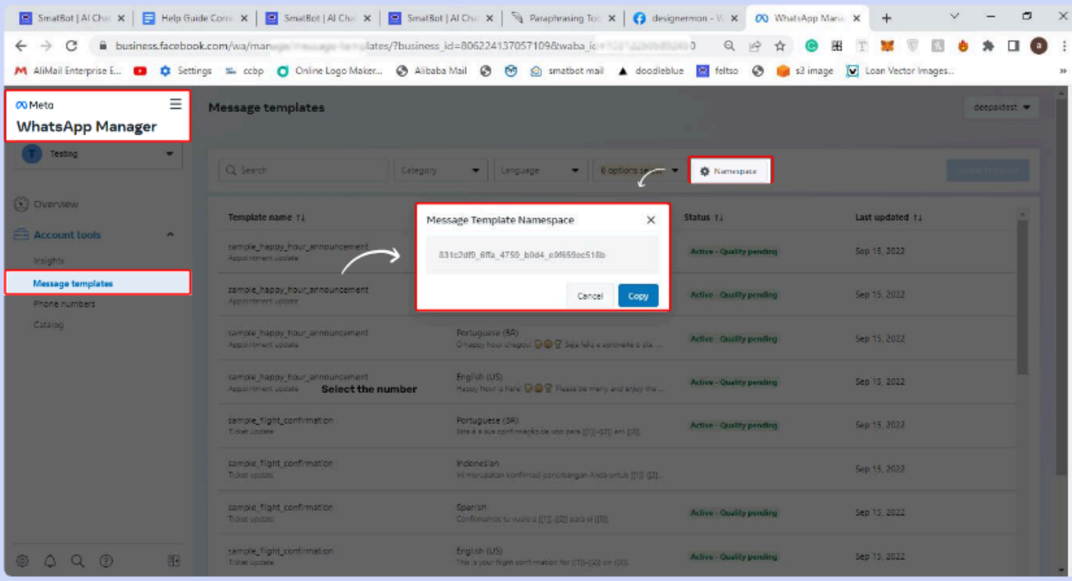


-
- Click on to Add Assets.
- Now **Select Apps** to enable Manage App Permissions.



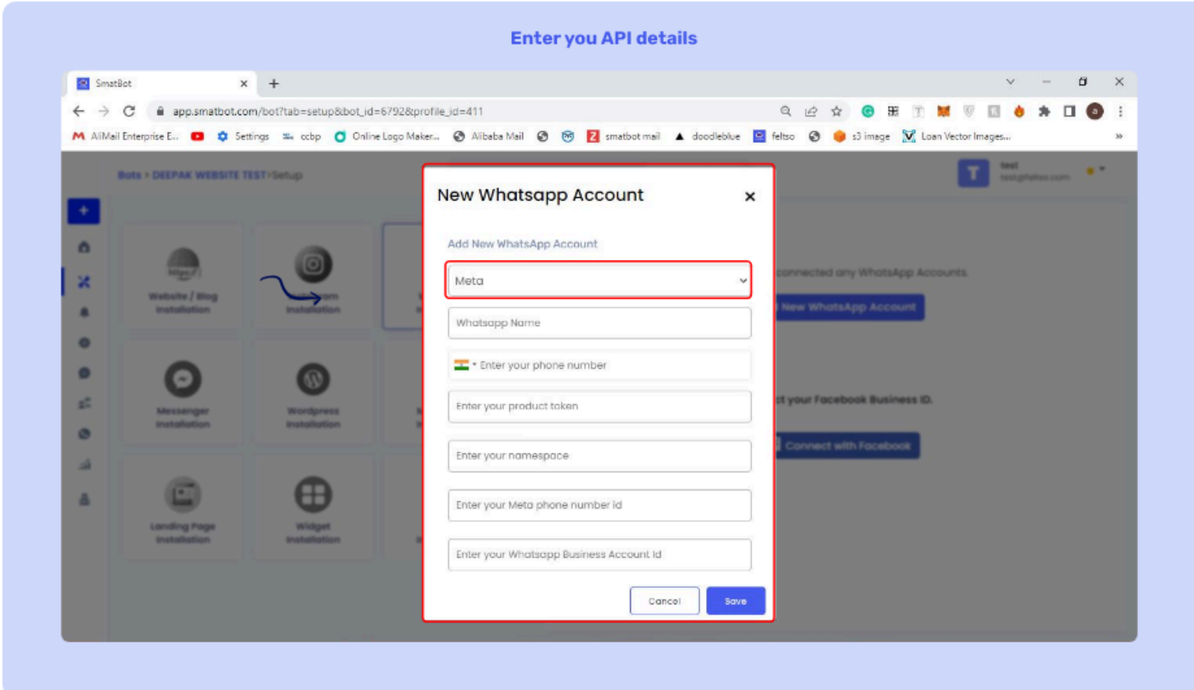
- Next, go to accounts, WhatsApp accounts and click on **settings** and then on WhatsApp manager.
- In the WhatsApp manager dashboard, go to Account tools and click on **Message Templates** and then select namespace. Save these details.

Go to WhatsApp manager , click on message templates , click on name space and save it in a doc

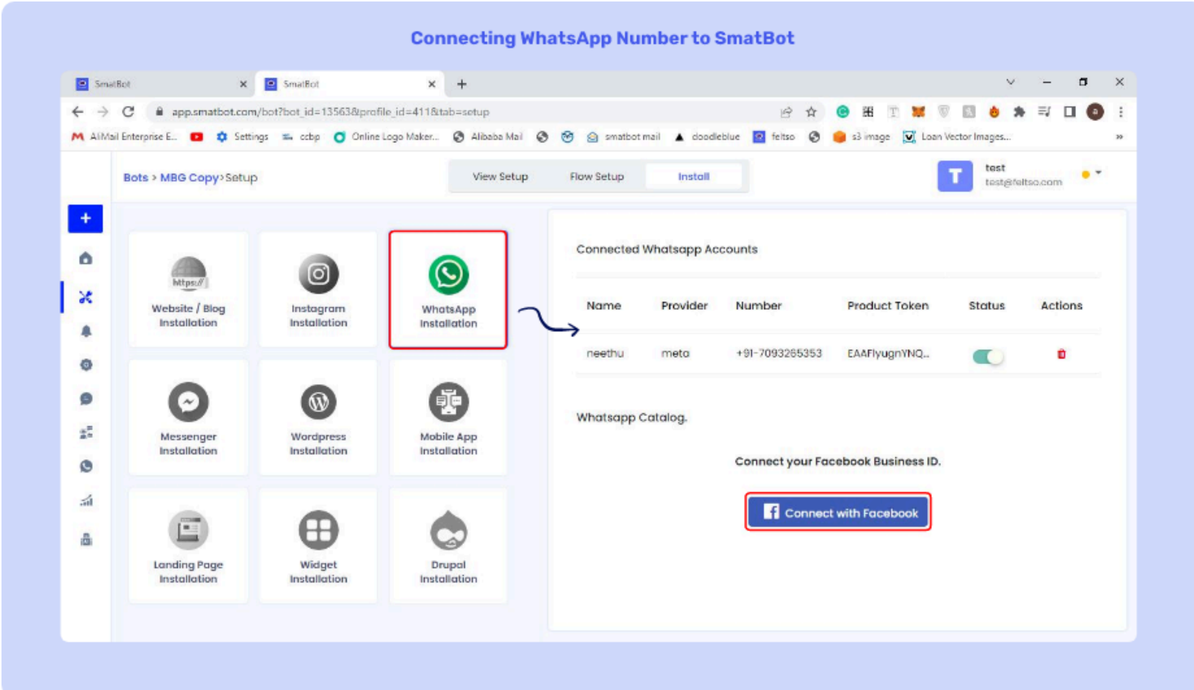


- Next, go to Smatbot.com and login with your user credentials.
- Click on the bot that you want to configure the Cloud API for.

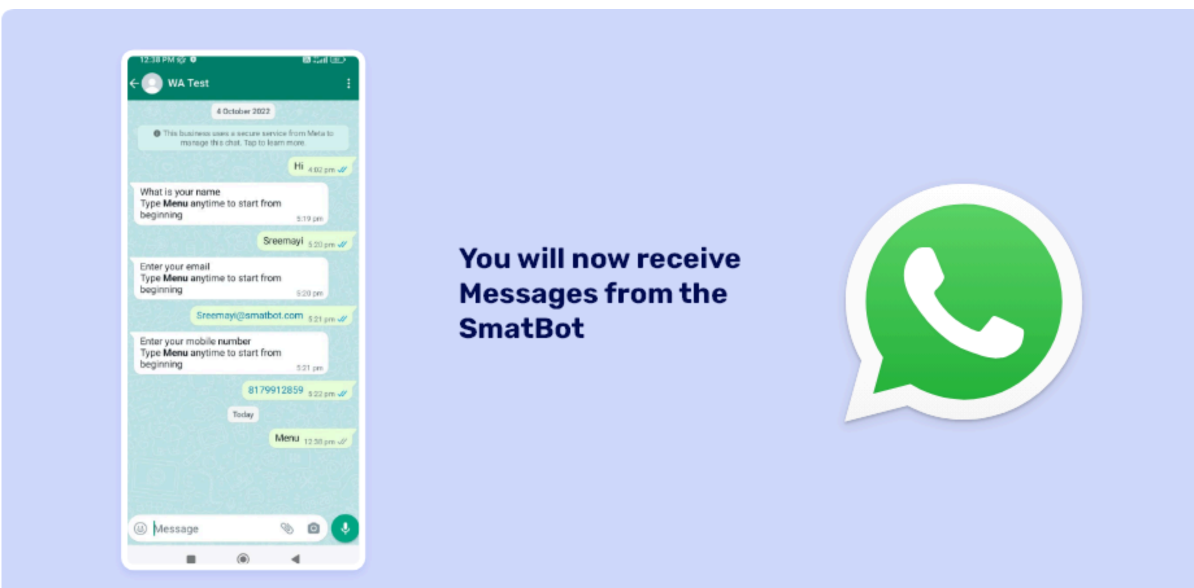
    - Create your bot flow in the flow setup. Navigate to the Install section, then click on **WhatsApp Installation**
- Now, add a new WhatsApp account.
- Select **Meta** as your WhatsApp provider. Choose your WhatsApp Name and enter your number given in Meta API.

- 

- To get the product token number, copy the **temporary access token** that can be found in developers.facebook.com.
- For namespace, copy it from the message template in WhatsApp Manager.
- Add both phone number ID and WhatsApp business account ID in their respective fields.
- Once done, click on save.



- WhatsApp might have sent you a message from Meta. Message "Hi" to that number to enable Smatbot's flow.



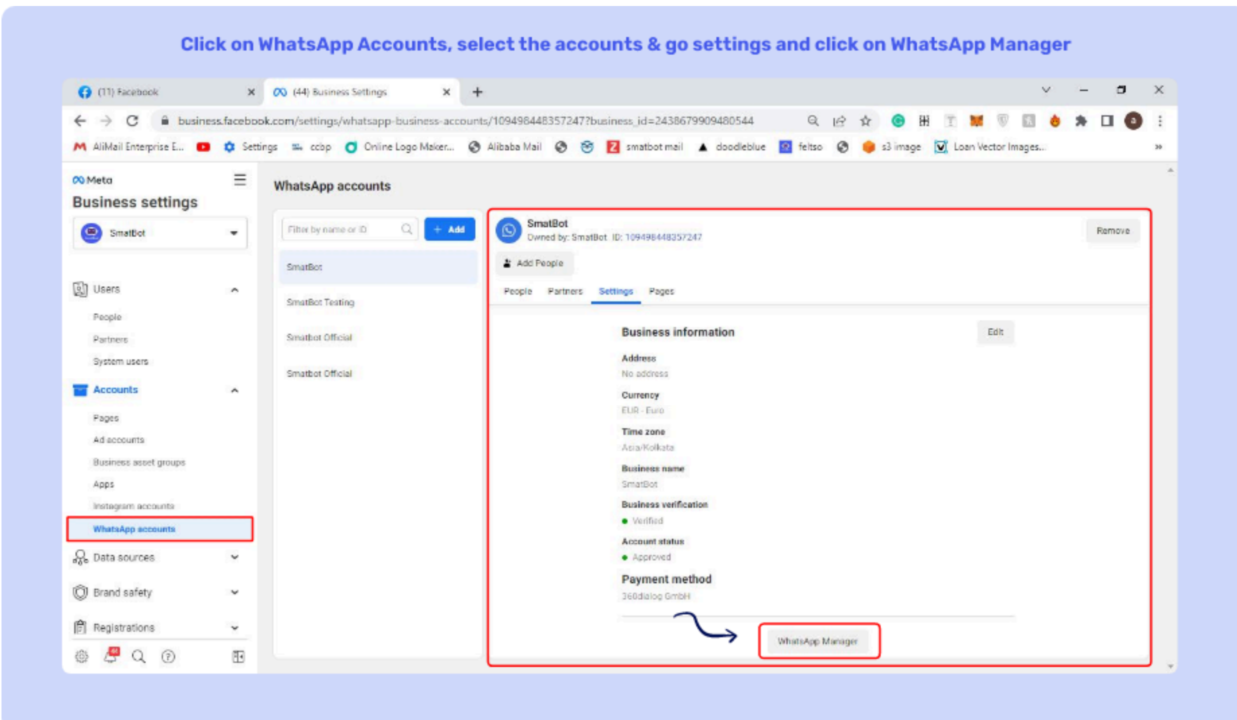
- Congratulations, you have successfully configured WhatsApp Cloud API.

====================**Applying for Template Messages in Meta**=====================

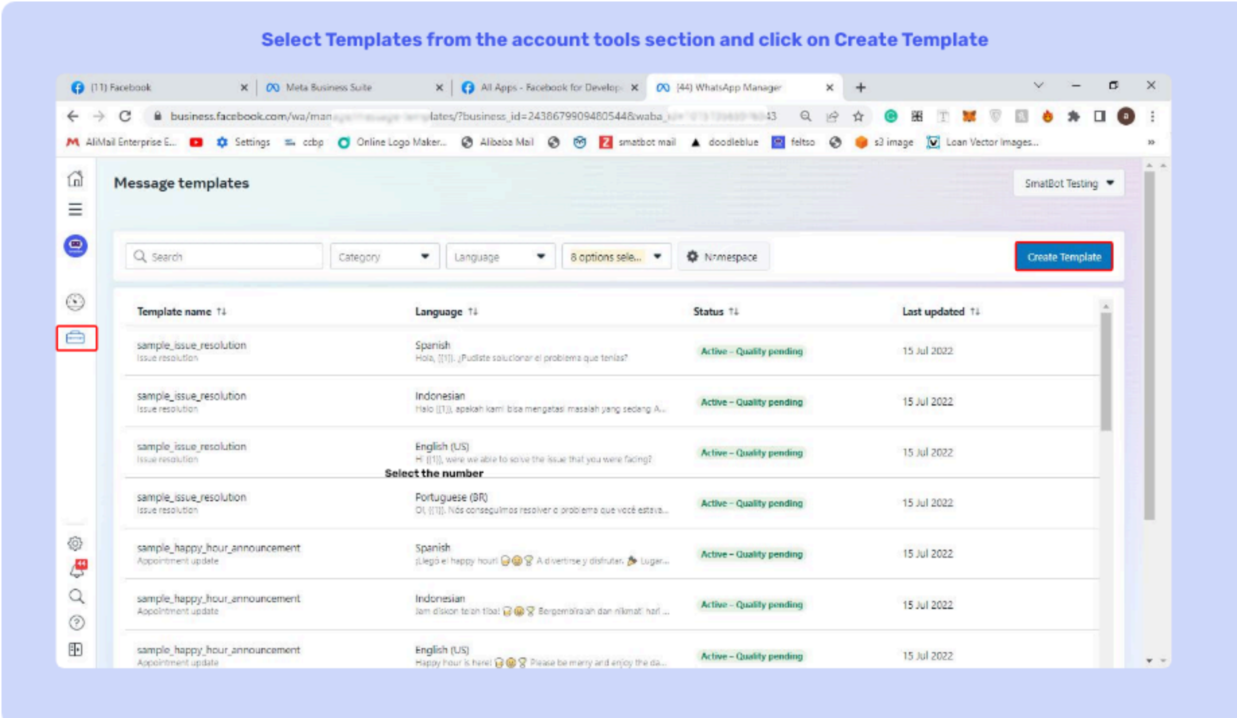
Applying for Template Messages in Meta

Login to business.facebook.com and click on the business settings icon.

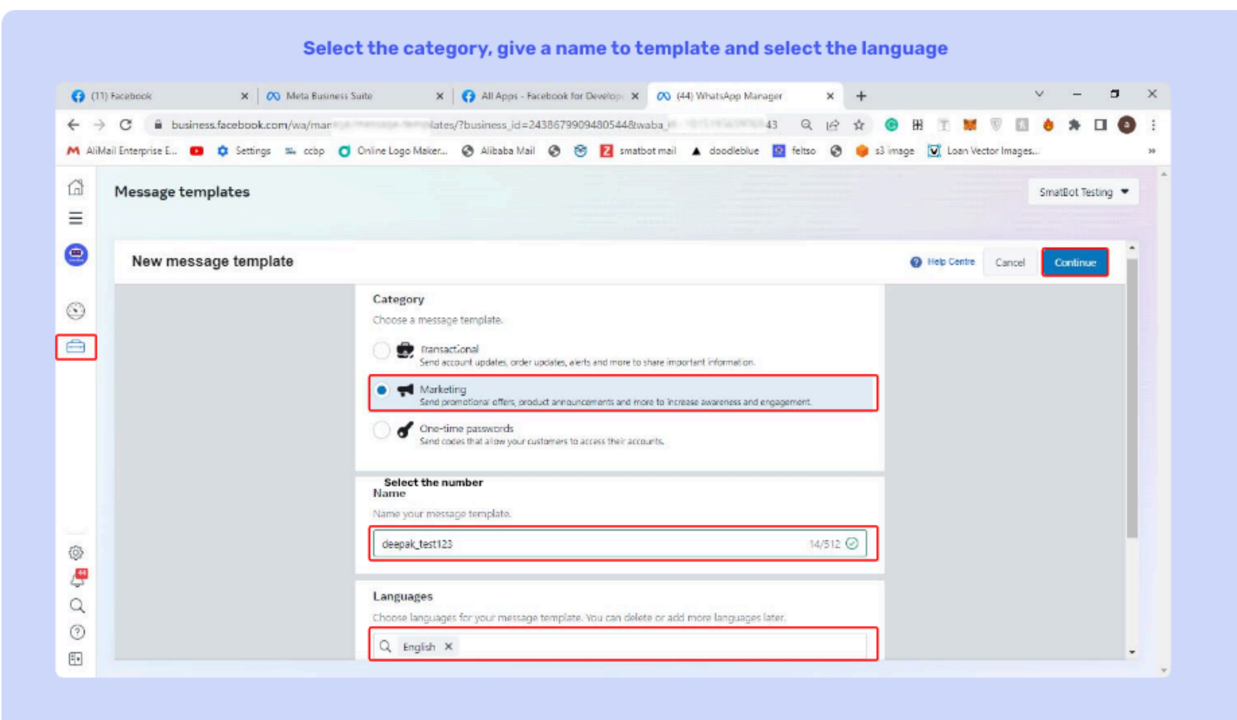
Select WhatsApp accounts, then click on **Settings,** and then on WhatsApp Manager.



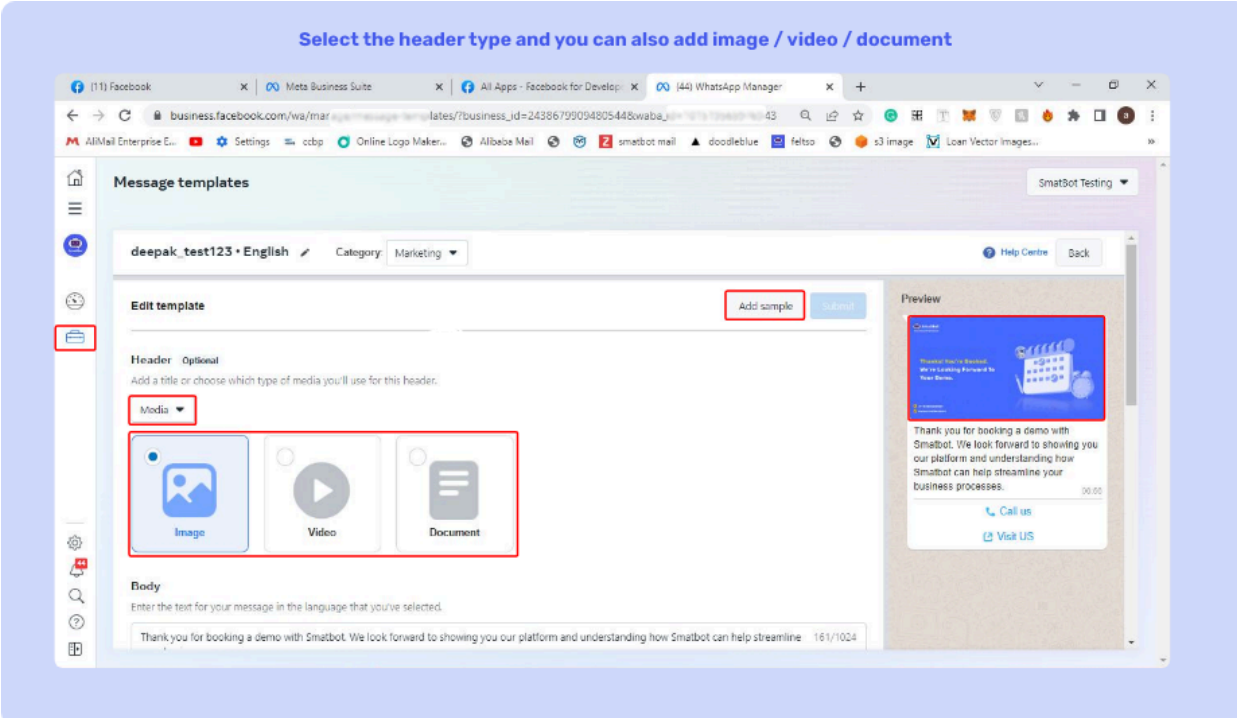
In the WhatsApp Manager dashboard, go to account tools and click on message templates to create a template.



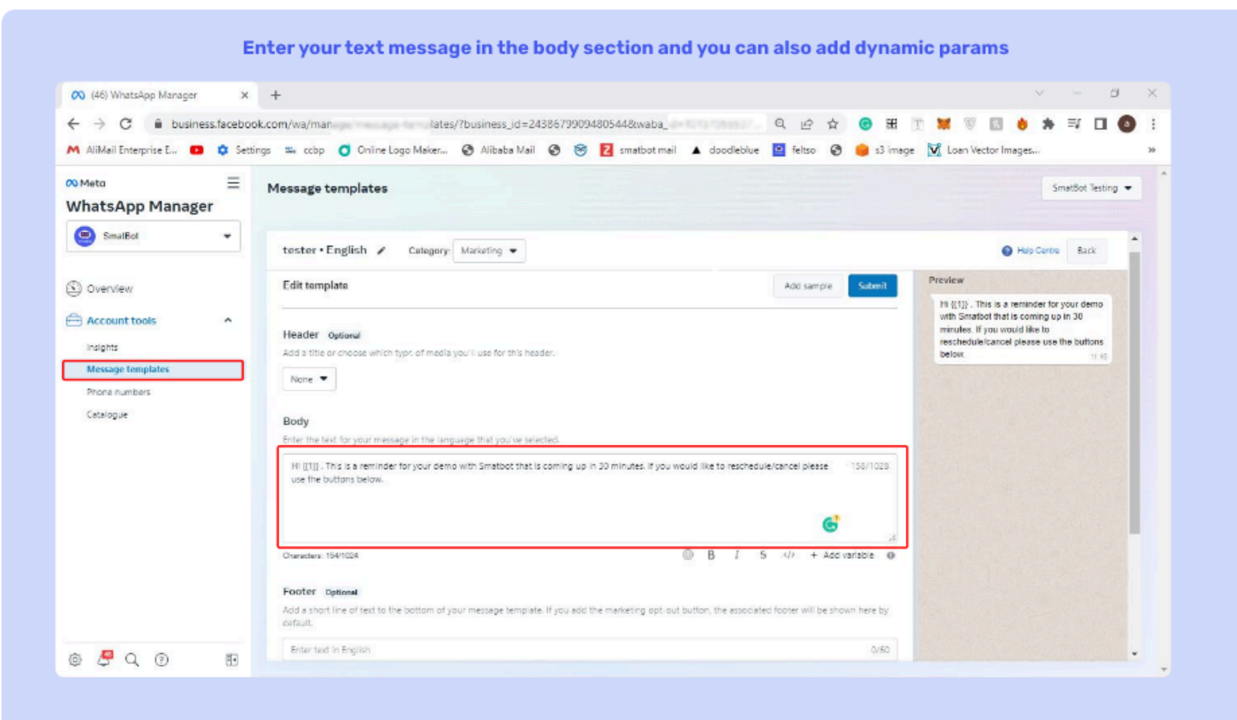
Choose marketing as a category, name the template message, select the **language**, and then continue.



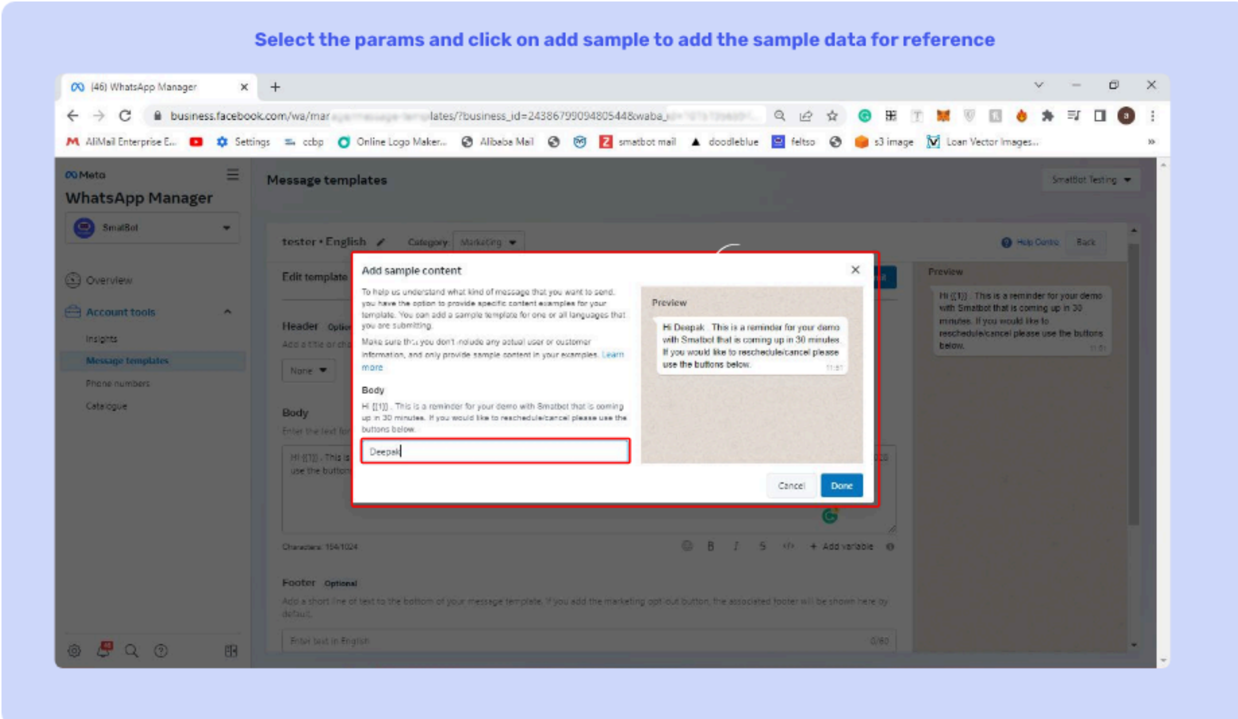
In the header section, choose **media**. Add the image, video or document.



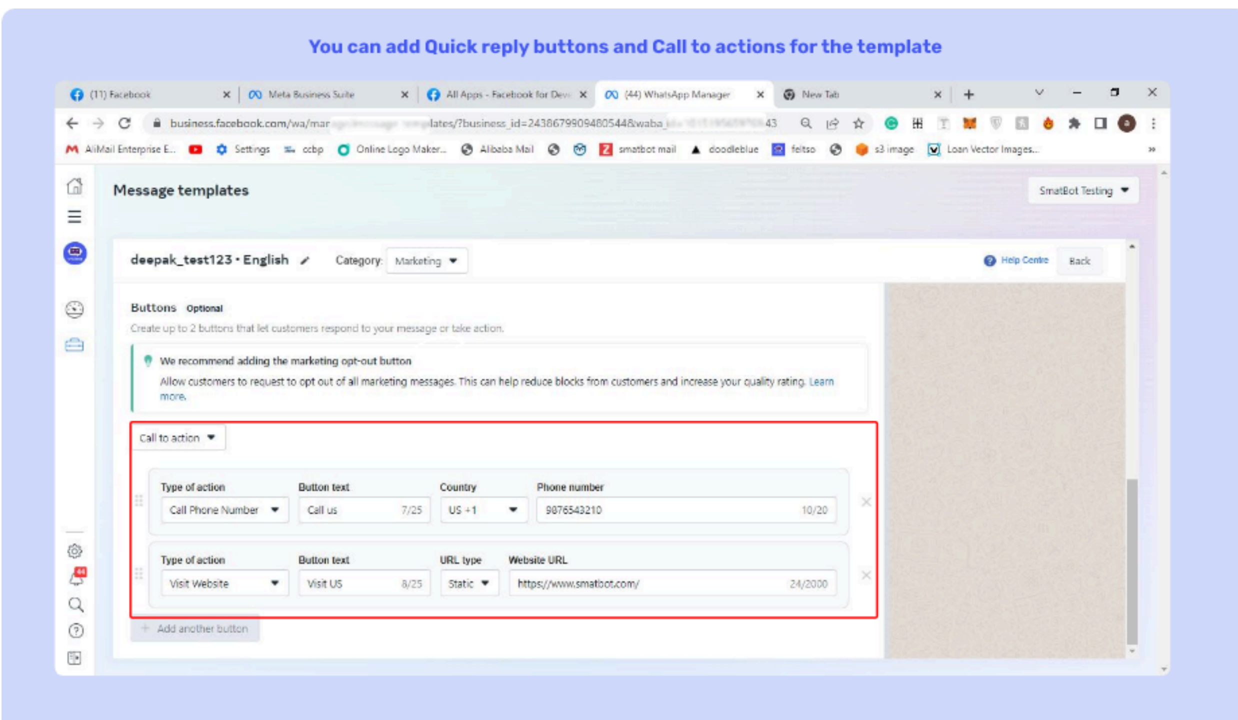
In the body section, enter the text message and add **variable parameters {{1}}**



Copy the variable parameters {{1}} and click on add sample to add the content for the variable parameter.

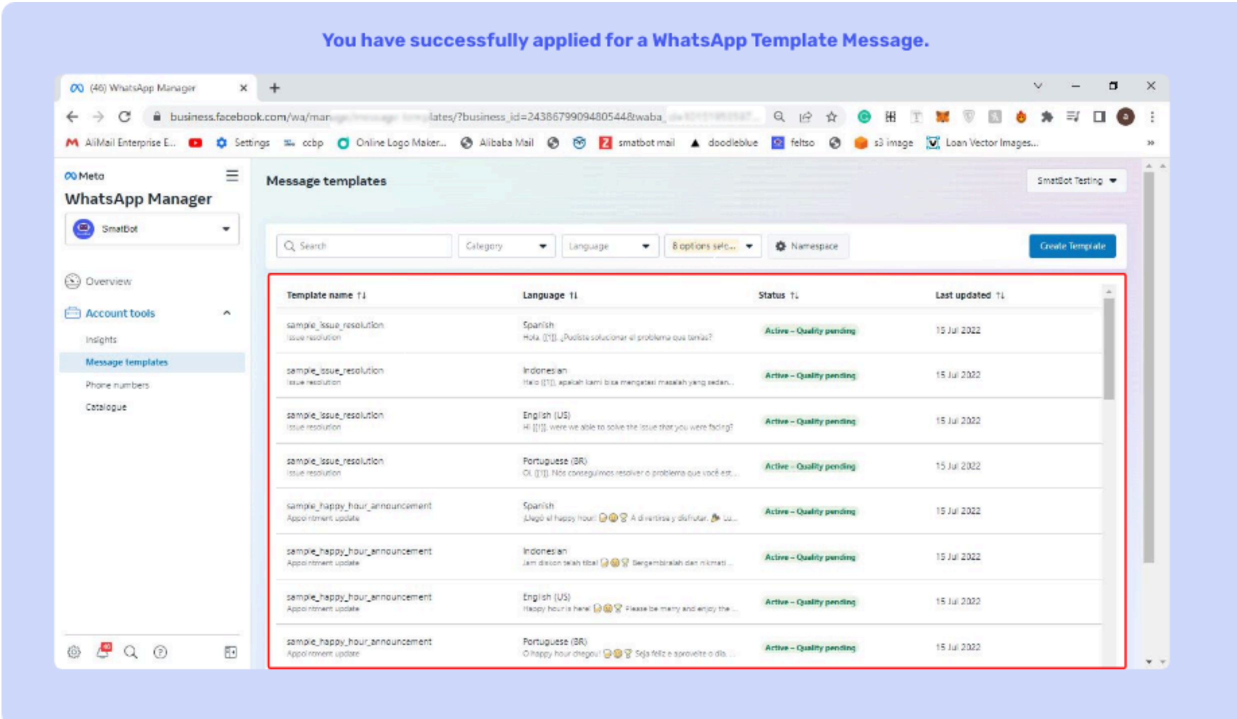


Add buttons as required for your template message. You can add **call-to-action** buttons or **customize** the buttons.



Once done, click on submit.

Great! You have successfully applied for a WhatsApp Template Message.



Note : You will get a confirmation from Facebook within **24 business hours.**

================**Applying for Green Tick Verification In Meta**
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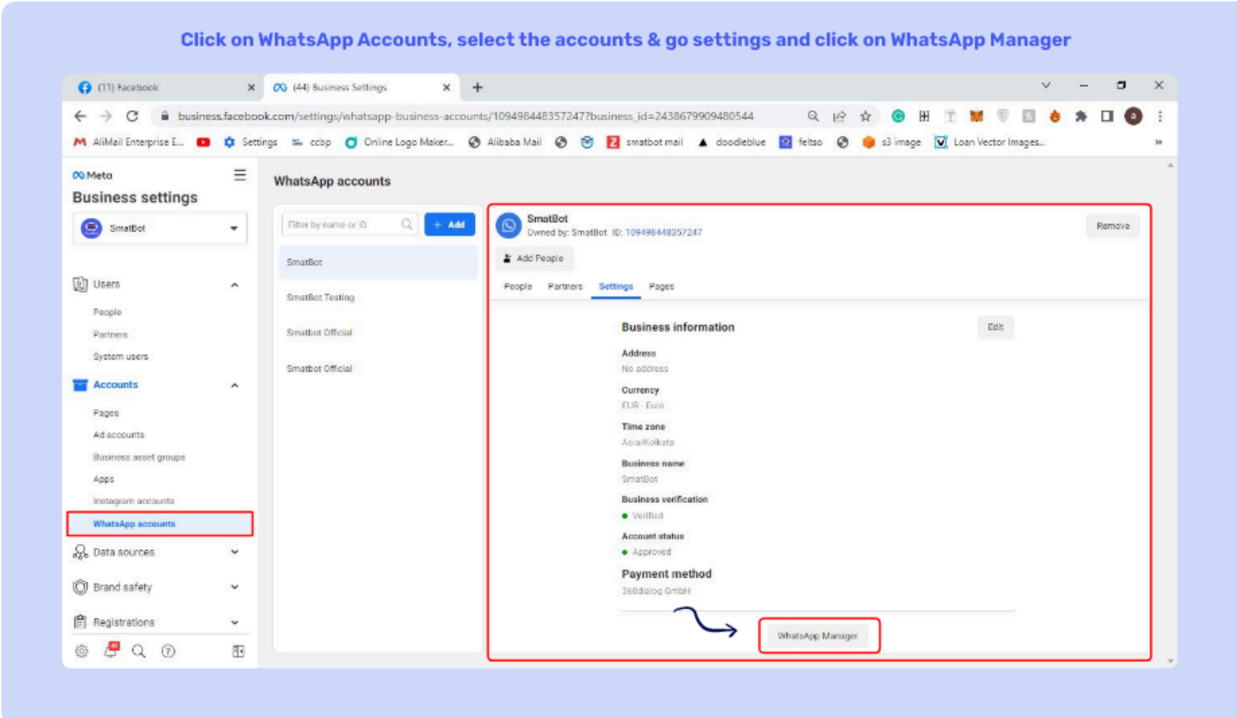
Applying for Green Tick Verification In Meta

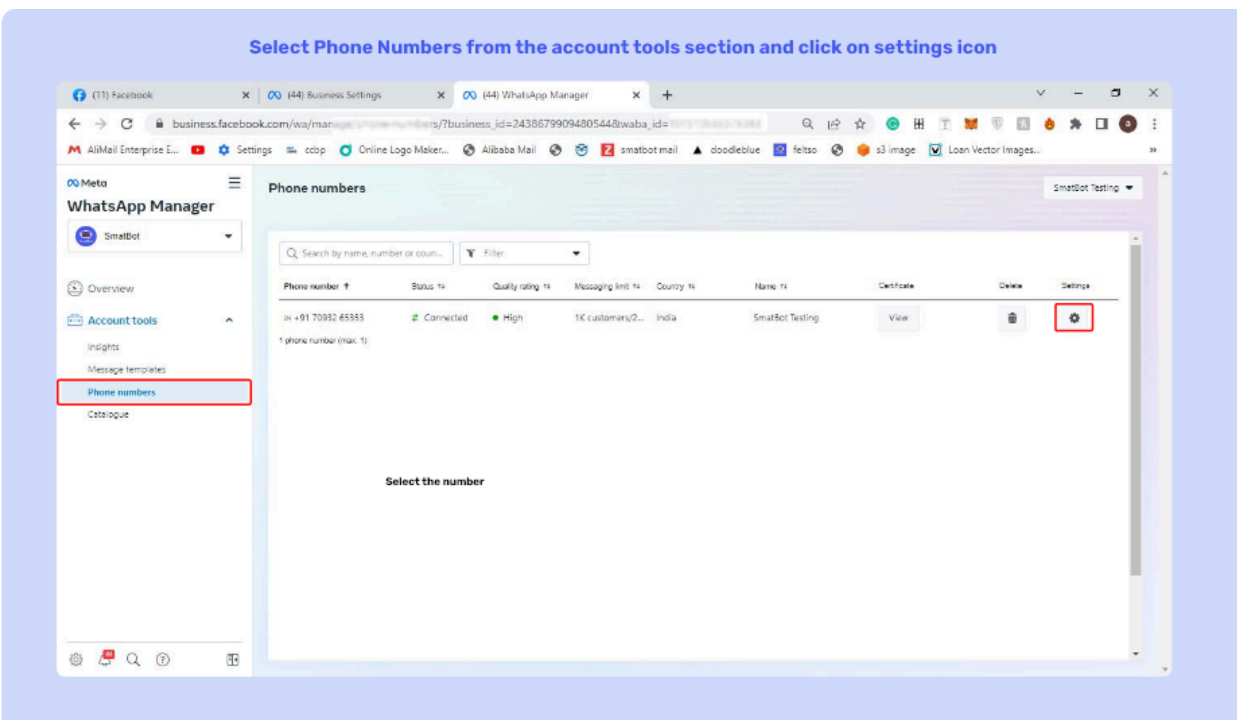
Login to business.facebook.com and click on the **Business Settings** icon.

Select WhatsApp accounts and click on settings, then click on WhatsApp Manager.



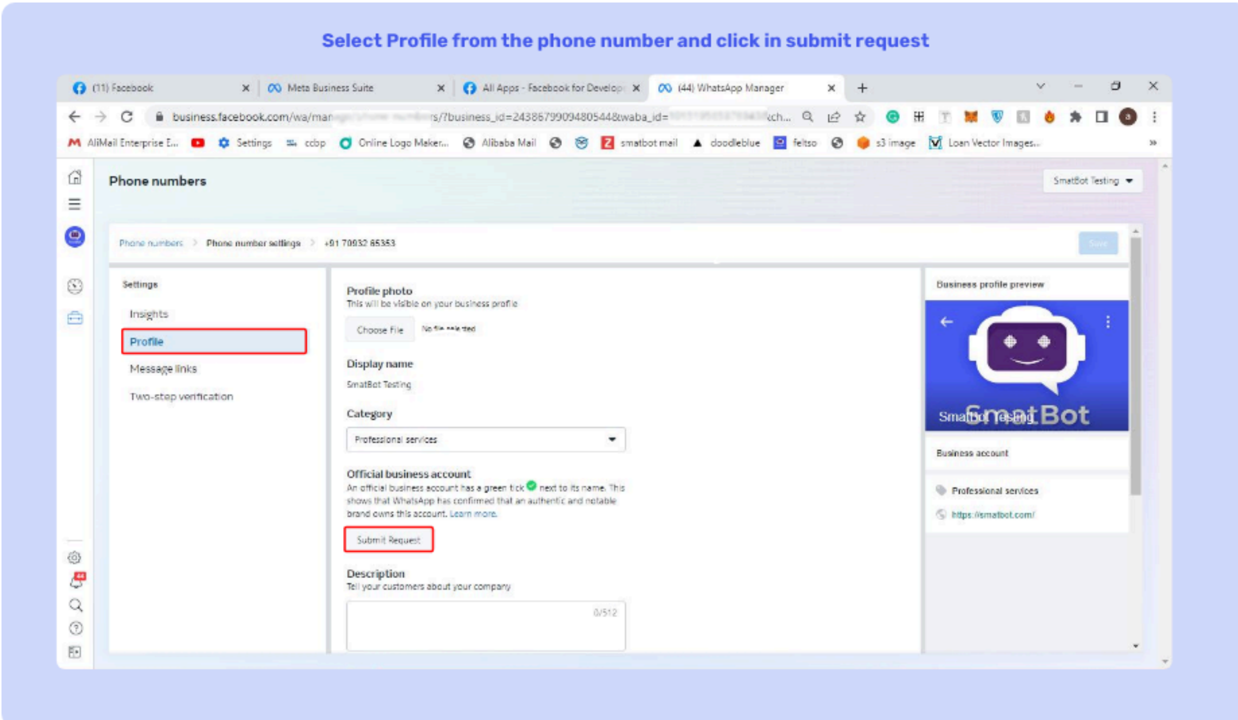
In the WhatsApp Manager Dashboard, navigate to account tools.

Select phone numbers and click on settings.



In the profile photo section, you can upload the image for your business profile.

If you wish to change the existing display picture, you can do so in this section.



Select the category of your business. Provide your business description and contact information.

Note : All these details, including profile photos, will be automatically filled in once your Facebook Business Verification is complete.

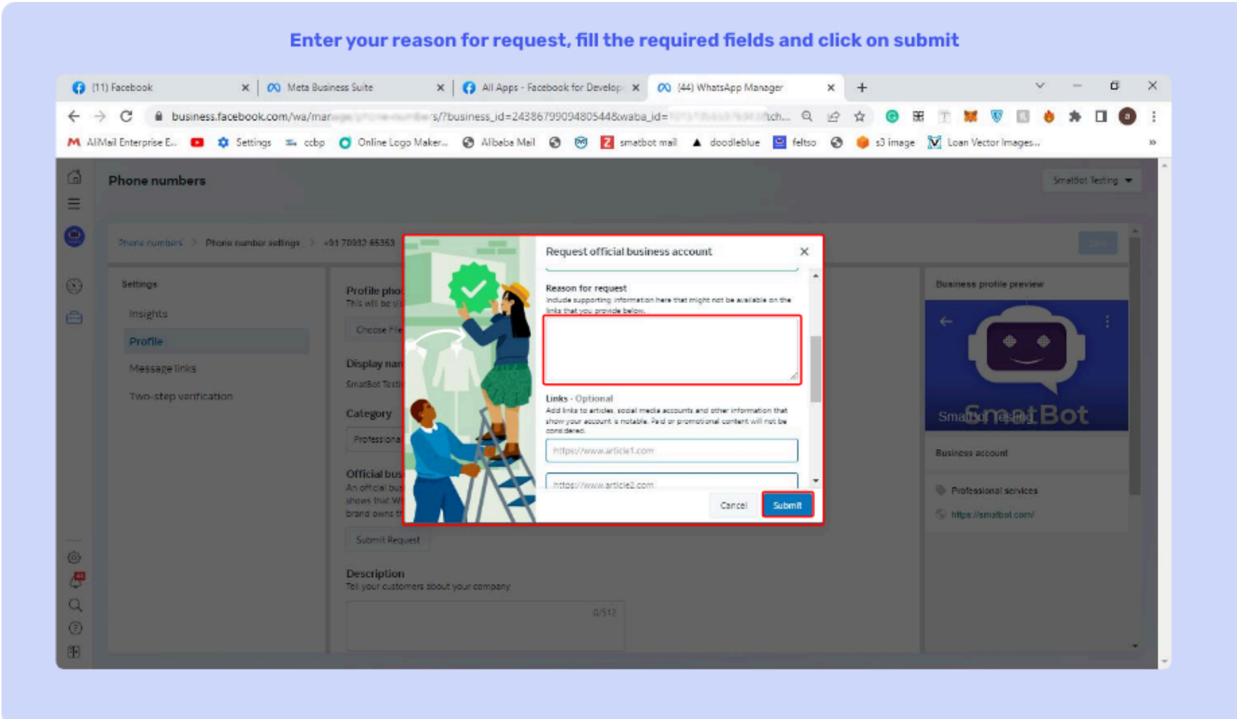
Next, click on submit request.

Note : In case the submit request button is greyed out, you will need to check and complete the following:

a) Your Facebook Verification must be completed.
b) Your Profile Display name must be approved.
c) Your Two-Step Verification must be turned on.

A pop-up screen displaying your request will appear.

Please provide the reason for applying for Green Tick Verification.



Provide the social media links to show your account is legitimate.

If the business name is in a language other than English, please provide those details as well.

Add the Facebook page and click on submit.

Great! You have successfully applied for Green Tick Verification for Meta.

Note : Facebook will review the request within 1-2 business days.

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Sub Flows -

Create sub-flows within your main chatbot flow to stay organized and keep only relevant details together.

You can set up sub-flows and create as many as you need.

You can refer/call content from the sub-flows anytime in the main flow.

Step 1:

In flow set-up, create your chatbot flow.

Step 2:

Click on the drop-down in the main menu and then on the plus icon to create a sub-flow.

Enter a name for your sub-flow and click on create. Add questions just like you would in the main flow.

You can add, edit or delete sub-flows.

Step 3:

If needed, refer/add your sub-flow questions in the main flow & add jumps.

Great! You have successfully created a sub flow.