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# Getting Started with CONI Chatbot builder

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This document will guide you through the first simple steps to implementing and using a Chatbot and aid you in achieving the best results from the solution.

Converse | Monitor | Engage

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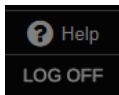
# Getting Started Guide

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Congratulations! You have taken the first steps to increase sales, conversions and customer satisfaction on your website!

This document contains instructions for creating and configuring a CONI chatbot using the BotBuilder, along with instructions for adding the functionality to your website.

If you are new to the Click4Assistance software we recommend you also check out Getting Started for Experiences which explains logging in to the software and human handling of chats. While this guide will get you started with building a bot we couldn't include everything. You may therefore wish to refer to the Help System, which can be accessed directly from the Chatbot module, or using the link in the bottom left of the software.



## We are here to help...

If at any time you would like some help or advice from our friendly team, please contact us direct on 0845 123 5871.

## What is the Botbuilder?

Click4Assistance has built a visual interface which allows you to design your own chatbot with no coding knowledge, use drag and drop to position your conversation steps and easily see your conversation flow.

### Using the interface

Login to the software and navigate to **Tools>Chatbots**. In this area you will see your list of chatbots which will populate as you add them. We offer a range of templates to help get you started. Click **+ADD NEW FROM TEMPLATES** to preview and add all bots' steps; alternatively, you can click **+ADD NEW** which provides a blank workspace and adds the first dialogue step.

### What are the steps?

The chatbot will take your visitor through a conversation journey. Each point in that journey is considered a step. The steps have different functions depending on what you want to do.

- Dialogue – present sentences or paragraphs of text, include links etc. if required
- Option – present the visitor with a number of choices which will direct the conversation along the correct path
- Data Capture – allow the visitor to free type to collect any relevant information
- Hand Off – transfer the chat to an advisor

### Present Dialogue

This is usually used as a welcome message or to present information during a chatbot session. Getting off to a good start is important, ensure your first message is welcoming by adding an avatar and greeting the visitor appropriately. Remember this is the first message a visitor will see.

### Add a question with options

You can create a node that present a question or statement with defined answers/options that each point to a specific step causing the pathway to branch out. This allows the chatbot to answer differently depending on the selection.

### Collect visitor information

Before the chatbot hands-off to a human, you will need to take the visitors name so that the agent can address them appropriately as soon as it's transferred. You may also want to collect other contact information to save time or if you are using the chatbot in an offline status, such as email address, phone number etc.

### Escalate to a human

More complex enquiries may need to be transferred to a human, or you may have chosen to use your bot in order to triage the enquiries to ensure the correct agent is transferred the chat. You can add a hand-off node and specify how the bot should transfer the chat (please see our [help system](#)).

## Why is a final step important?

The final step is required when you have reached the natural end of the conversation flow and you would like all data fields emailed to an appropriate email address. When the conversation has ended, the email is automatically sent to the address in the configuration menu.

## Preview

At any time while building your bot, you will be able to see it in action within the Preview area. Interact with your bot and test in this area before going live on your website.

## Making the Chatbot Live

### Assign bot to Pre-Chat or Offline Form

You have now completed your first chatbot, so you can go ahead and assign it to a Pre-Chat or Offline form. You will see all available forms in the drop-down list. If you select one that is used on an experience it will overwrite the HTML with the bot you just created and (if you have added the script to your website) will start working immediately.



**Note:** Please be aware that a hand-off step must NOT be used if applying the bot to an Offline form.

### Add the script to your website

From the side navigation select **Tools>Chat** where you will see the <SCRIPT/> button, in which you can find the short piece of JavaScript code that you can copy and paste within the body tags of your website.

### You're now live!

Congratulations, you are live with the chatbot that you have created! If you intend to transfer chats to a human you must ensure that agents are logged-in to the software, or simply allow the chatbot to handle enquiries 24/7 and forward the details so that you can contact the visitor in your own time.

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