

User Manual Of ChatBot Admin



 **Enterprise Bot**



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SUPPORT SERVICES

Enterprise Bot is committed to strong customer service and provides quality interactive human-like interactions powered by AI. To scale your customer service and sales interaction with cutting-edge AI chatbots that are pre-built integration, contextual understanding and smart escalation to live agents based on sentiment analysis.

This document outlines the features and functionalities of the chatbot and describes how you can efficiently develop and configure your chatbot.

For Support & Services:

Country: Phone no & support@enterprisebot.ai

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OVERVIEW

This document outlines a comprehensive guide for the development of new chatbots, by means of a step-by-step guide for its creation, as well as for instructions for the improvement and fixing of issues to existing chatbots.

This manual refers to the chatbot's developer to create and develop a Conversation AI-based Chatbot. AI Chatbots or conversation AI systems are not only capable of understanding a customer's intent, no matter how the question is phrased, but are far more capable too.

ROLE OF AI, ML AND NLP IN CONVERSATIONAL INTELLIGENCE

Firstly, it is vital to understand why **AI (Artificial Intelligence)** is so important in **Conversational Chatbot** development.

AI is considered to be the theory and development of computer systems that can perform tasks normally requiring human intelligence, such as visual perception, speech recognition, decision-making and translation.

Artificial Intelligence (AI) uses two important elements that help the chatbot give accurate responses.

- **Machine Learning:** Machine Learning (ML) is an algorithm that helps the chatbot to learn from the queries and the data provided by you during training. When a query is triggered, Machine Learning helps the bot to first monitor the previous conversation it had with the user and give a response accordingly.
- **Natural Language Processing (NLP):** NLP assists the bot to understand and interpret the information closely. With NLP, you train your chatbot with various intents that the user will enter during the conversation and these Intents will streamline the response to the query. NLP works with different **intents** and **entities**.





HOW TO CREATE A CHATBOT

Prerequisites:

To create a new chatbot you need to log in with the correct credentials for SSE-Chatbot Admin.

LOGIN SCREEN

On the Login screen, you will first have to enter your **[Email]** and Click **[Next]** to enter your password.

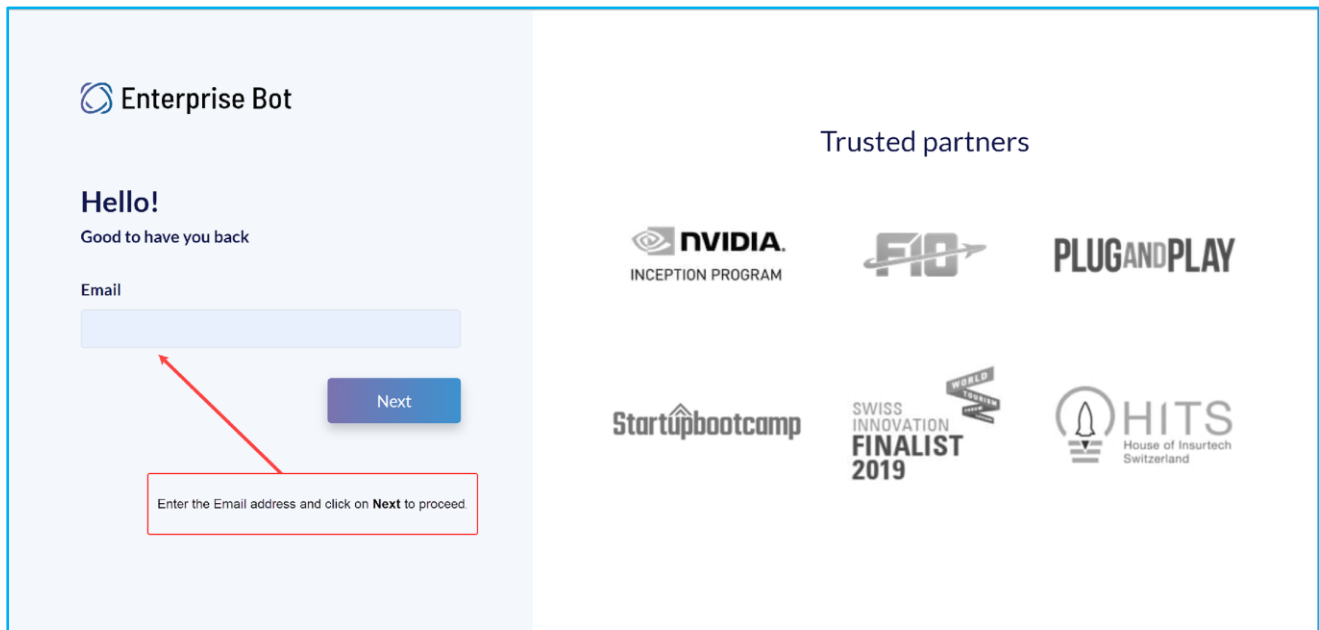


Figure 1: Enter the Email and click on Next

On the next screen after entering the email address, you need to enter the password to get into the Chatbot Admin.

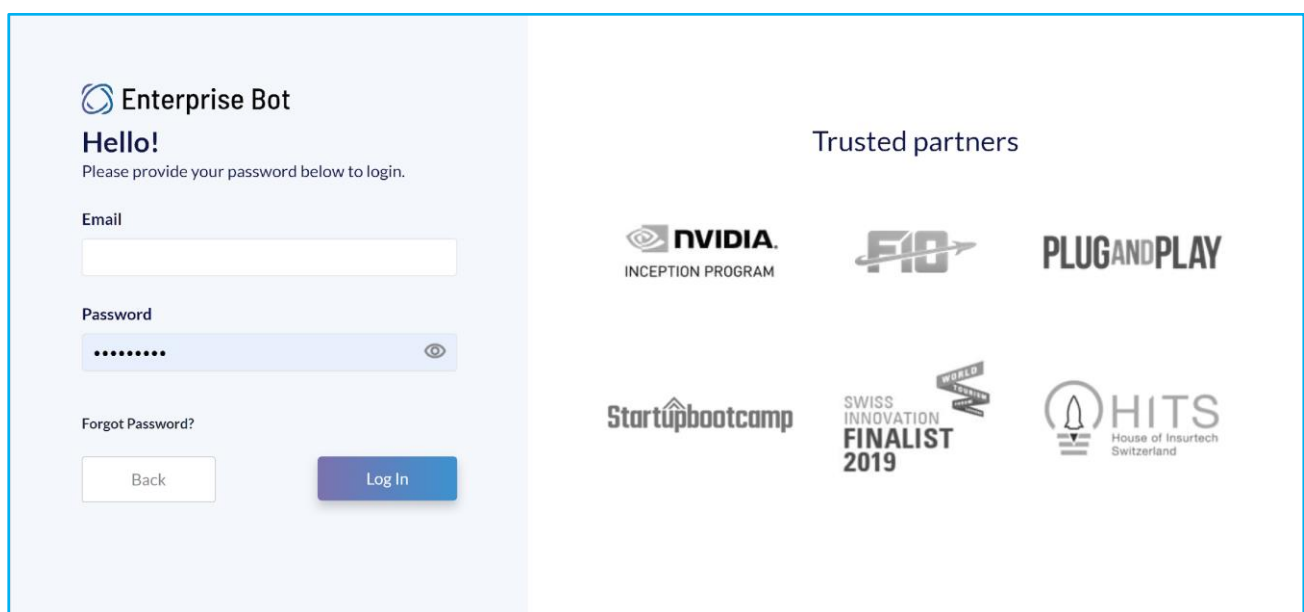


Figure 2: Login by entering your password.





FORGOT PASSWORD

This option allows you to retrieve your password in case you have forgotten. Click on the **[Forgot Password]**. On the forgot password screen, you need to enter your registered email address. We will send you an email with a link to reset your password.

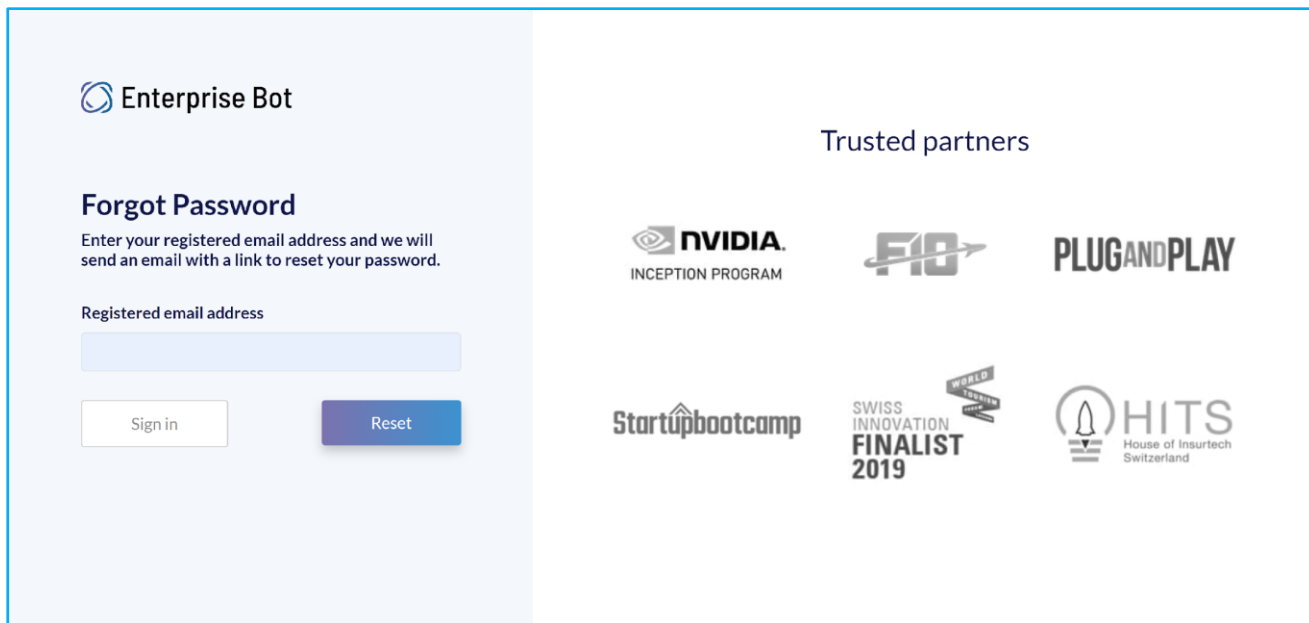


Figure 3: Enter your registered email address to reset the password

CREATE YOUR BOT

Once you are successfully logged in to the SSE-Chatbot admin, you will be able to create your chatbot by following these instructions.

HOW TO CREATE A NEW CHATBOT

To create your bot, you must click on the **[+Create Bot]** icon at the top panel next to the **[Add Skills]** option.



Figure 4: Click on Create Bot option

The option will allow you to create your customized bot. The following fields must be filled out.

- **Name your bot:** This refers to the bot name you are going to choose.
- **Short note about bot:** This refers to the short description of the bot.
- **Language:** The default language is English.



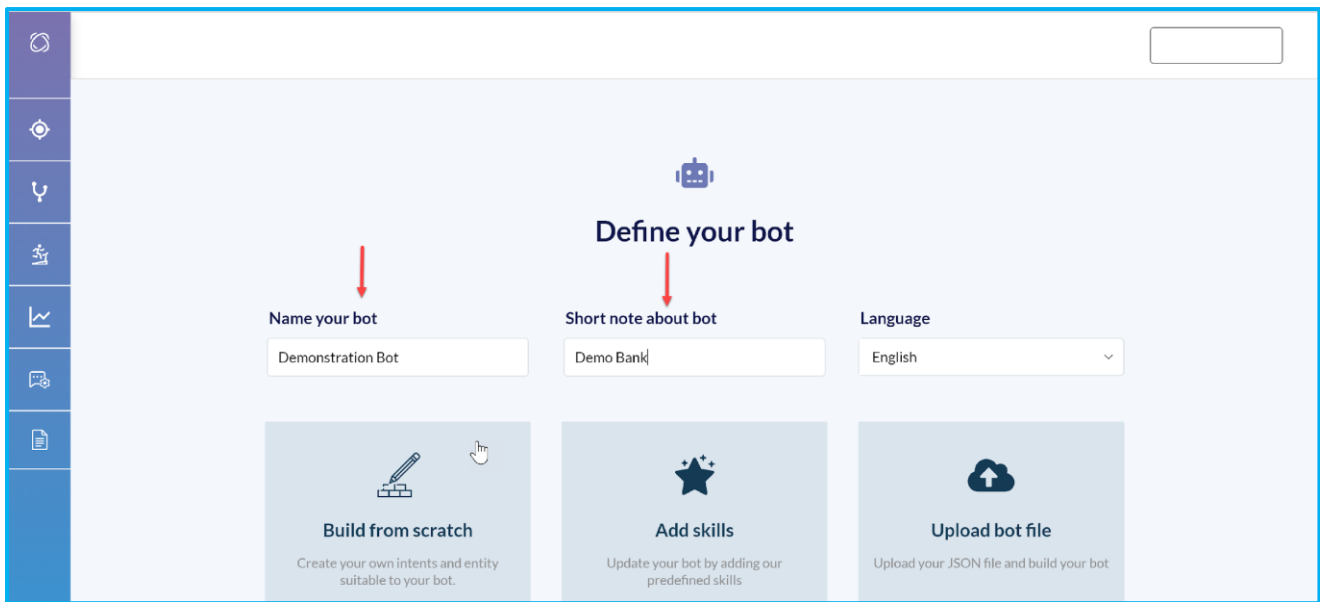


Figure 5: Name and Short Description.

SKILLS

Skills are a set of an inbuilt library with readily available intents (with triggers) and entities that can be used in any bot (new or existing). Skills come with the option of adding Tags and Triggers. You can always add skill while you are adding Tags and Triggers to save.

HOW TO ADD SKILLS

We recommend you to set skills depending upon the bot you are creating. Depending on the bot you can select the available skills to add. You need to enter the **[Skill]** name and add the **[Triggers]** and **[Tags]** for the first time. If the desired **[Skill]** is already available, then you just need to add the skill.

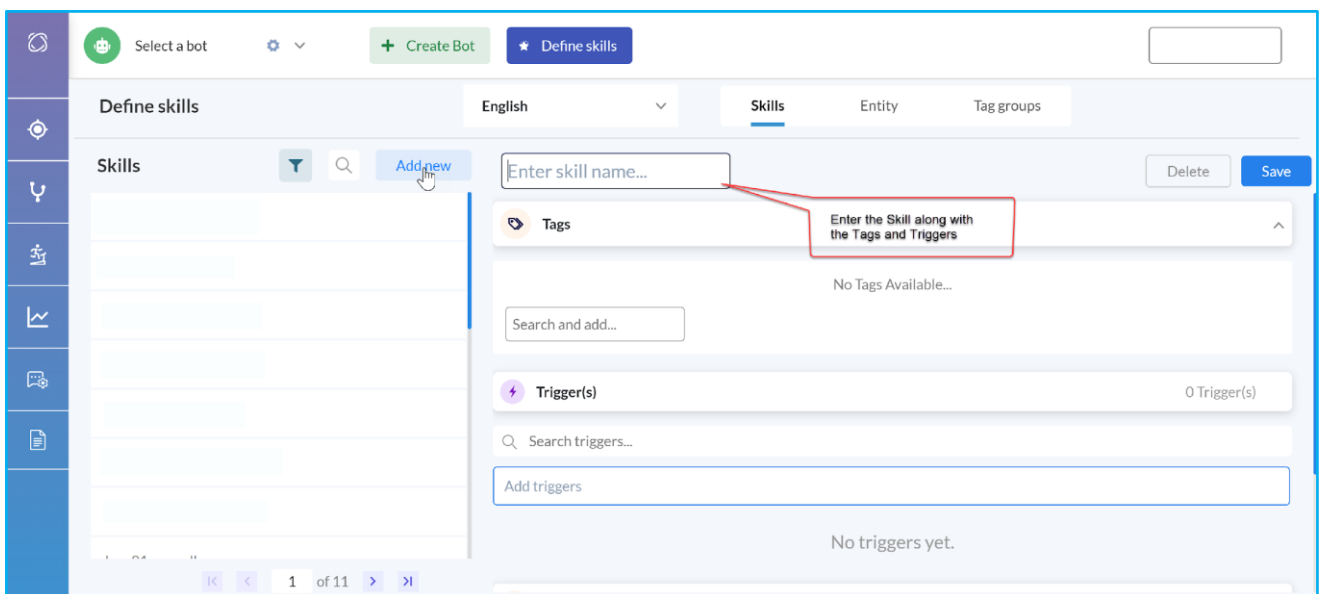


Figure 6: Add the Skill from here with Tag and Triggers.





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After adding a new skill you must click on **[Save]**. The list of newly added and existing skills will be displayed on the left panel. Creating a new Skill and adding the triggers is a one-time activity.

From the list of Skills, you can **[Search]** and **[Filter]** the Skills. Click on the **[Filter]** button to filter skills with the **[Tag]** groups.

Skills are extremely important to build an efficient Chatbot because it contains the triggers and the tags. You can also import the triggers based on a particular **[Skill]**. Although the tags are not purposeful in your final chatbot. It is just a handy tool to search your skills list if you want to add specific skills to your chatbot. e.g. You can filter your skills-list by searching for the tag 'health'. All skills that have been tagged in this way will then be shown as a result.

ADVANTAGES OF USING SKILLS IN CHATBOT

Skills can save your time and effort in Chatbot development. Skill comes with Triggers and Tags. You can use the same [Skills] in multiple Bots. So if you are developing multiple Chatbots you can always use the common skills. This will reduce the time and effort to develop the Bot Development process.

Due to the nature of Artificial Intelligence, a large set of Triggers for the Skills and Intents is necessary for the Bot's Machine Learning algorithm to work accurately. As the number of Triggers increases, the bot will gain the ability to recognise questions that are phrased slightly differently, such as when words are misspelt or sentence structure or the sentence structure differs.



Tips: Skills can be used in multiple chatbots to save time & effort.

INTENTS

An intent is a goal or purpose behind a user's input to a chatbot. An entity represents a term or an object in the user's input that provides clarity over the context for a particular intent. Adding an intent is the most important step to creating the bot.

HOW TO ADD INTENTS

To add an intent simply click on the first icon on the left panel, which will display [intent] on mouse hover. To add an Intent click on the **[Add new]** button. You need to enter the name of the **[Intent]** in the text box.



Several default intents will be available upon the creation of a bot. By default, a couple of intent will be available. E.g. default_bye, default_dislike, default_thank_you etc. You can't delete the system defined default intents.



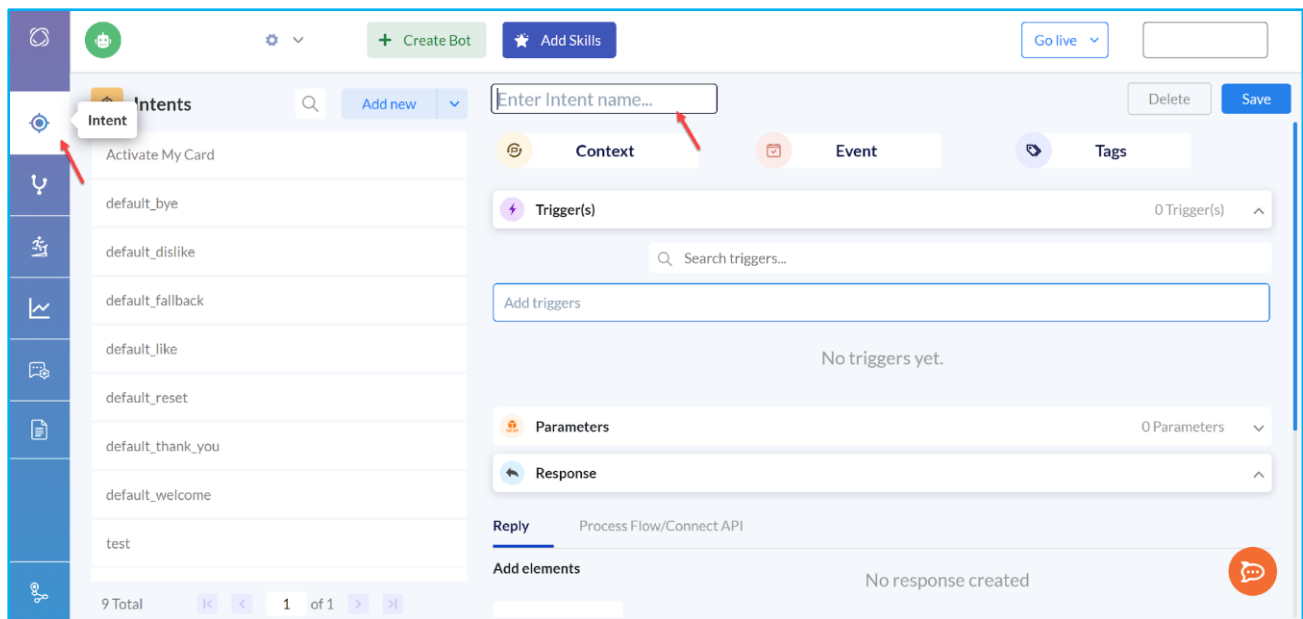
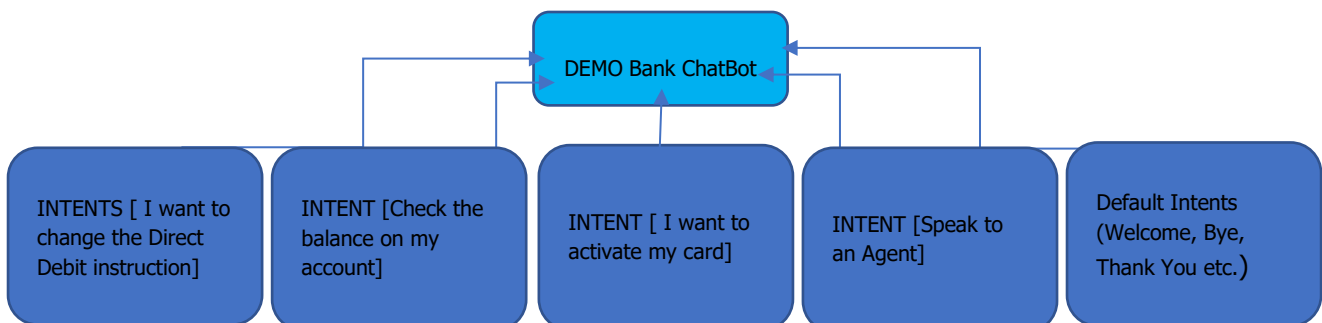


Figure 7: Add the name of the Intent

After adding the **[Intent]**, click on **[Save]**. The intent which you have added will be shown under the list of intents. You can add multiple intents depending upon the ChatBot you want to create.

Example:

You are creating a Chatbot related to Bank and Bank Account related queries for your customer.



In the above diagram, we have just shown a couple of Intents. The more intents you have, your bot will be able to resolve the queries and increase customer satisfaction.

HOW TO SEARCH INTENTS BY NAME AND REPLY

The intent list can be explored by using the search box at the top of the intent list. Using the filter symbol, you can filter your search by intent name or by intent reply



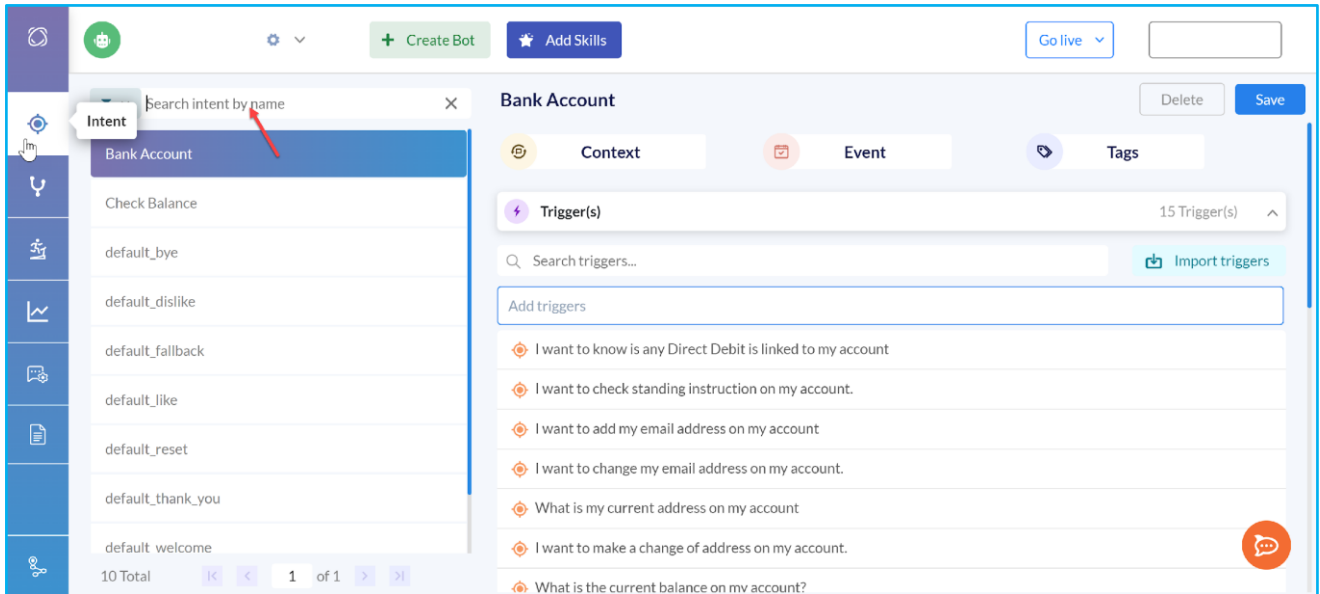



Figure 8: Search Intent By Name or & Reply

TESTING WINDOW ON THE INTENTS PAGE

On the Intent page, you will have an option to test your chatbot. The purpose of this testing bubble is to check if your answers are working by triggering them. The testing bubble can be accessed by clicking on the icon  in the bottom right corner of the intent page.

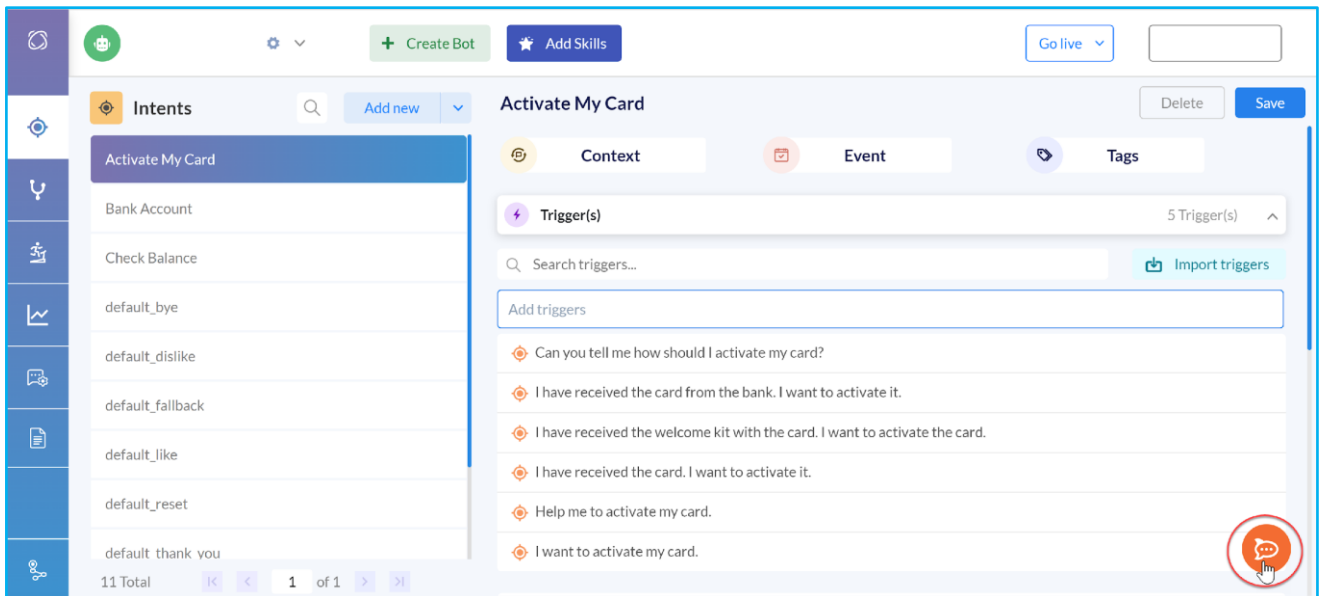


Figure 9: Click on the icon to open the testing bubble

The chat session will open once click on this icon. **For more information about the chatbot training [click here](#).**



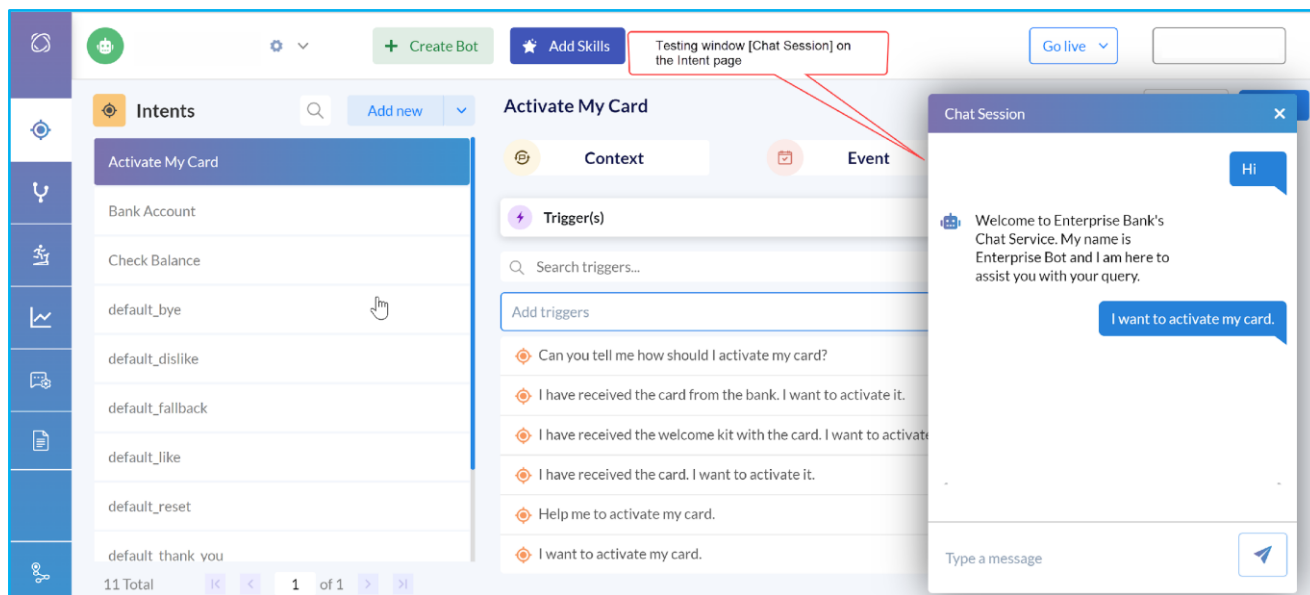




Figure 10: Testing window / Chat Session on the Intent page

 https://drive.google.com/file/d/1tKnJO9QNWgxtZi_86BG7RqqyGXYqcbB/view?usp=sharing

TRIGGERS

Triggers are conditional tests on incoming events, while the actions are one or more than one programmatic step that the Bot will take to fulfil the user request. We advise you to use **Proactive Triggers**. Proactive chat triggers are defined as automated message that is triggered based on visitor or user behaviour or attributes to engage in contextual conversation.

Chat triggers all of you to reach the user in the right context at the right moment to resolve their issue or queries and thus the conversational flow proceeds seamlessly.

 **Useful Tricks and Tips:**

The wildcard is very useful in saving time. The ultimate default category (UDC) is used by the chatbot to provide an answer if no other suitable category is matched. This symbol in AIML is known as Wildcard, For example, the Keyword “play” includes all the words starting with “play”, such as “player” and “playing”.

It's good to remember that a Keyword group should include synonyms to a word. As a general rule, we advise you to have at least 20 example sentences to get enough accuracy and avoid false positives i.e. bot giving wrong answers.

ABOUT USING WILDCARD IN CHATBOT

In the tips section, we have already explained the Wildcard. There are various wildcards in AIML. We use an asterisk * in the pattern to capture the user's input. This symbol in AIML is known as WildCard.





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Wildcards are captured many inputs using only a single category. Several different wildcards apply that can be used in AIML.



Note that, wildcards apply only to words and not characters within a word.

```
<pattern>Hello */</patten>
```

Here the pattern is the opening and the closing HTML tag. Now this pattern will match the following:

Hello there!

Hello Sam.

Hello, anymore there?

HOW TO ADD TRIGGERS

You need to add questions **[Triggers]** in regards to the intent which you have created. So we advise you to add the maximum number of triggers which will work as a set of instructions. Each trigger contains action or instruction for how the bot will respond to inputs received when the bot receives a question from the user.

We recommend you add more triggers or at least 50 triggers to function your bot more effectively. You can add long sentences or short sentences, however, the triggers or the questions should be relevant to the Intent. The AI should have more data to function the bot effectively.

Simply enter the questions in the **[Add Triggers]** text box and press enter to keep adding more triggers. You will also have an option to **[Edit]** or **[Delete]** the trigger once you have added it.

To edit the trigger click on the **[Pencil]** icon and to delete the click on the **[Delete]** button. These two icons will only be visible on mouse hover at the right-hand side of the text box.



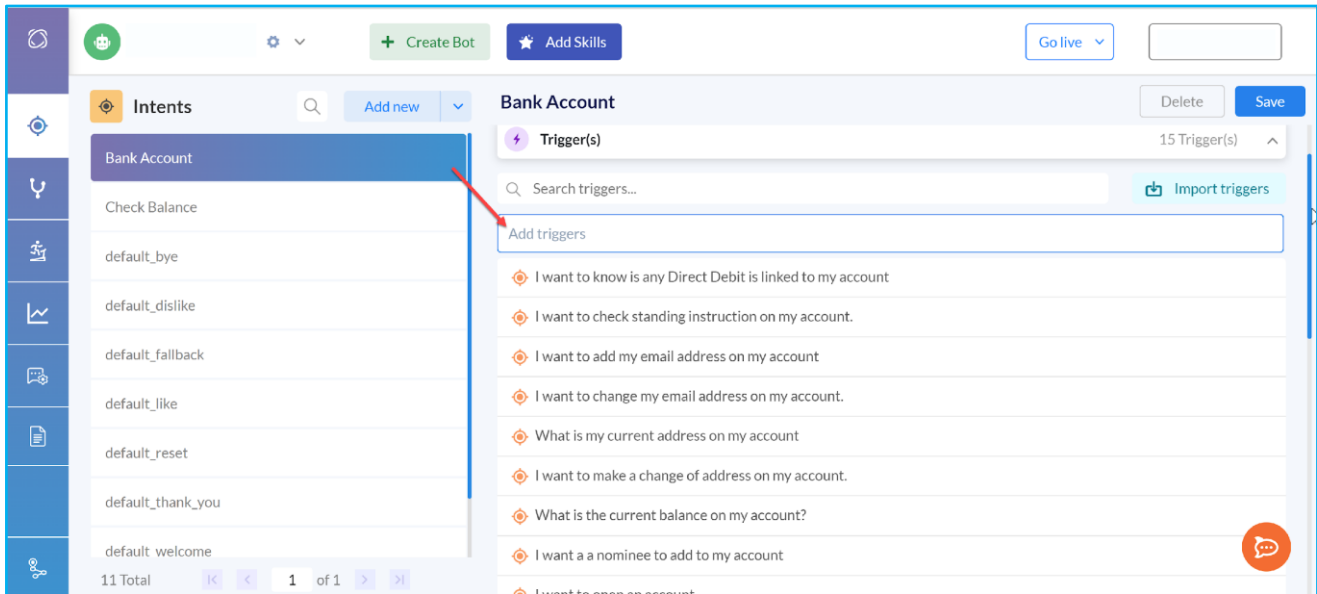



Figure 11: Adding triggers against a particular intent

 While adding triggers you must ensure you have selected the correct intent.

HOW TO IMPORT TRIGGERS

You can also use the option **[Import Triggers]** to reduce your time and effort. This option allows you to import triggers in the Triggers list if you have already created a list of triggers. The list of triggers should be saved in CSV **[comma-separated values]** format. You can simply drag or drop the file or upload the CSV.

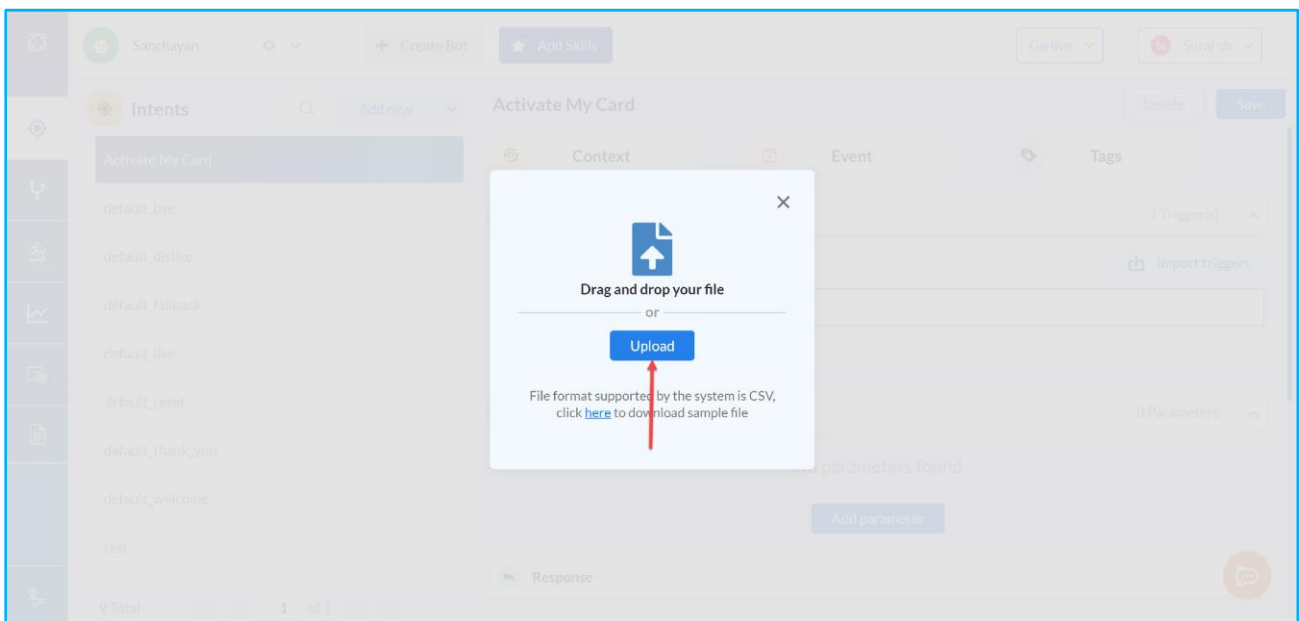


Figure 12: Drag and Drop or Upload the CSV containing the list of triggers





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To import triggers you must create the CSV file as shown below. Since no other file types are supported make sure that the file you are saving should be only in the comma-separated value.

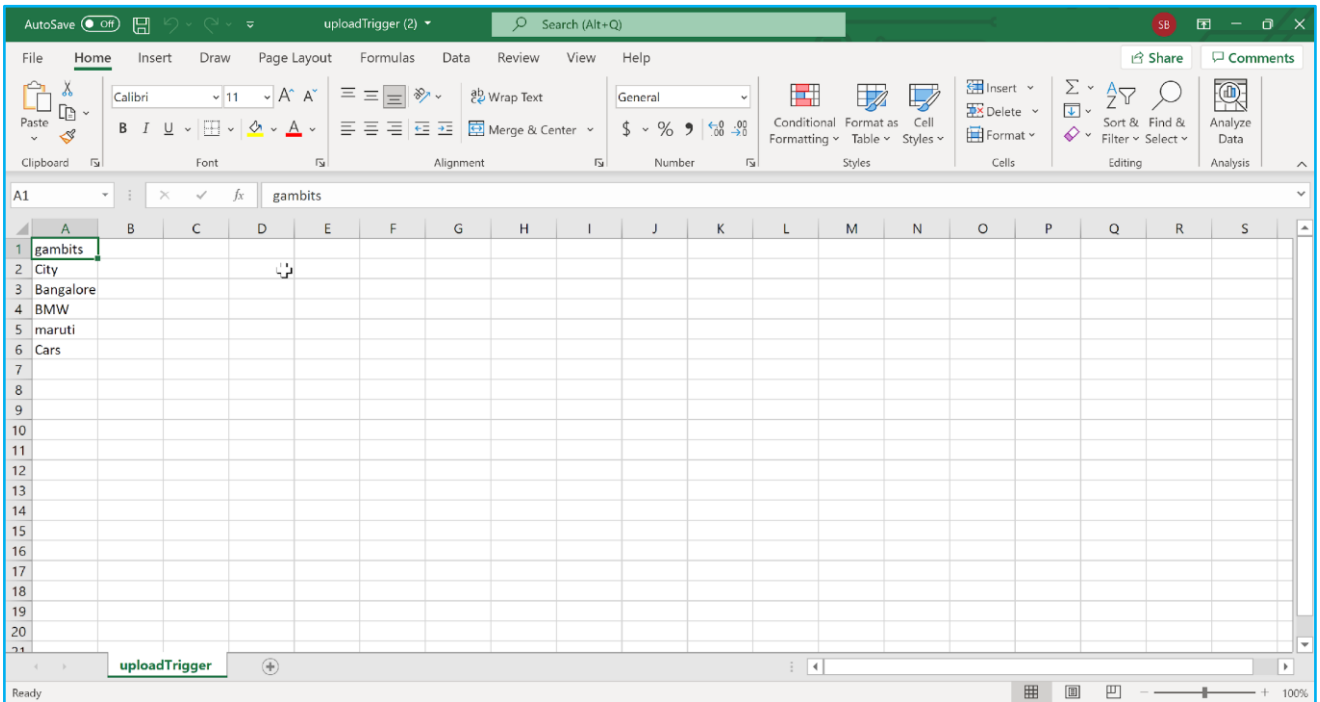


Figure 13: Trigger list for upload in CSV format

HOW TO IMPORT TRIGGERS FOR MULTIPLE INTENTS

You can also import triggers for multiple intents. While creating your chatbot you might come across a situation where you have to import the triggers for multiple intents which will save your time. Click on the [^] button beside the [Add New] button on the Intent list.

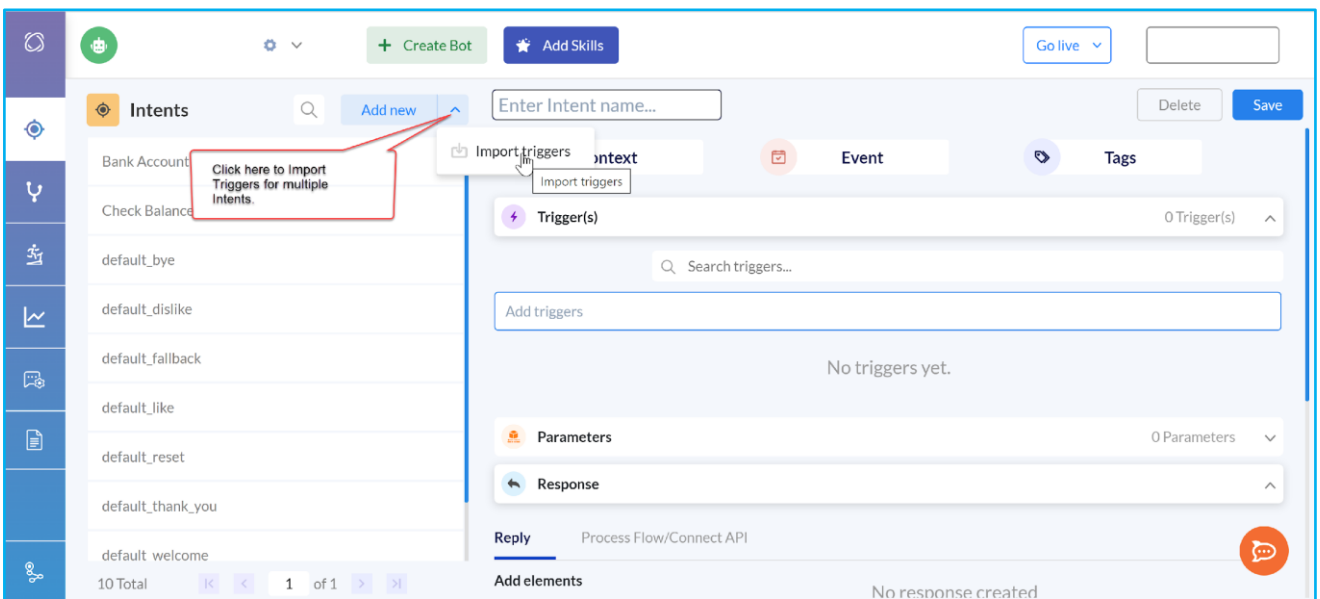


Figure 14: Import Triggers for Multiple Intents



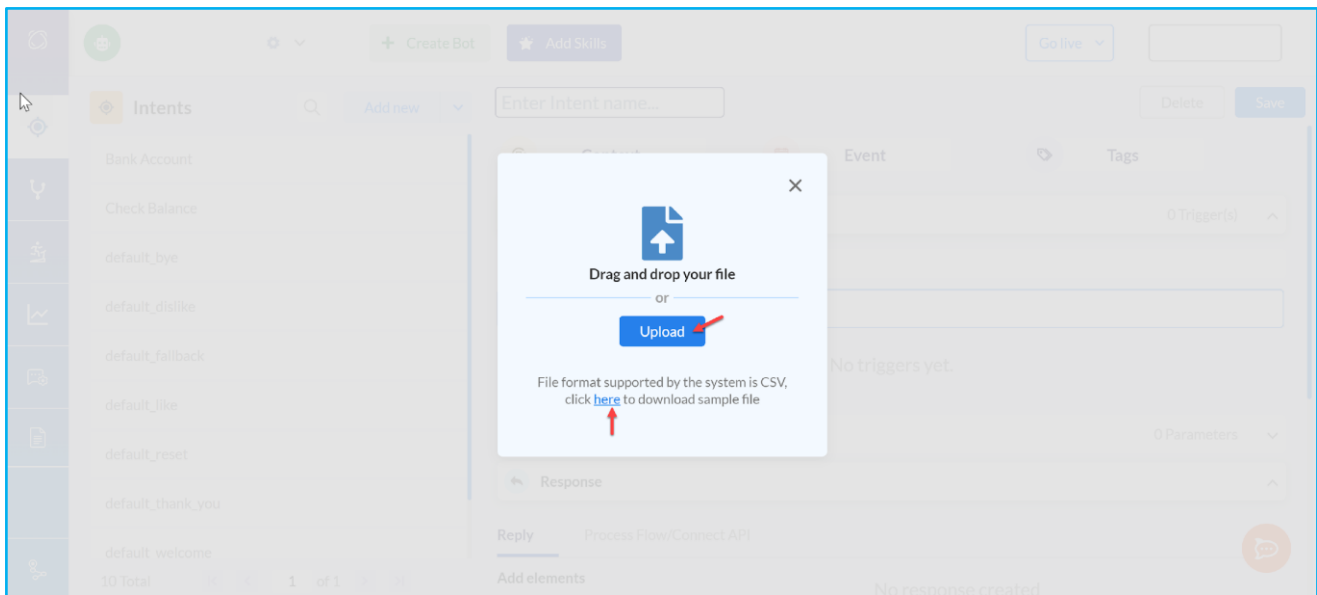


Figure 15: Upload the CSV file to import triggers for multiple intents

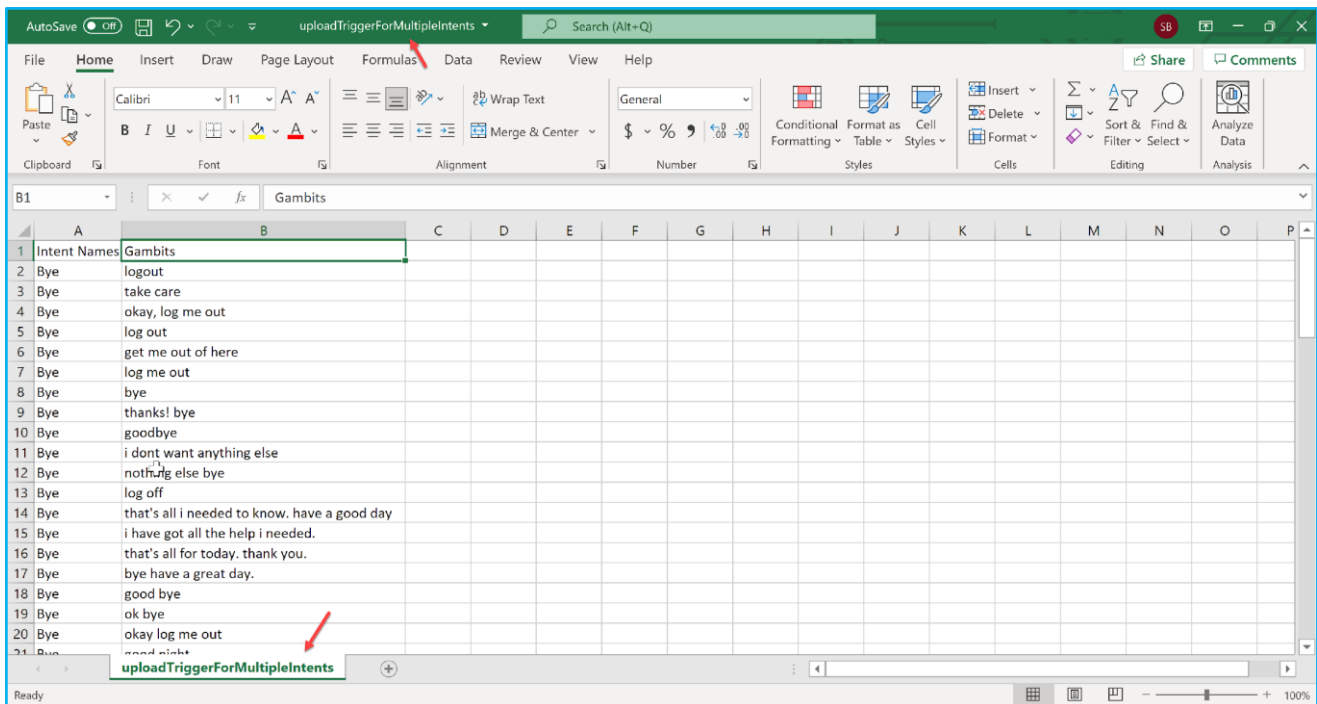


Figure 16: CSV files to upload triggers for multiple intents

KEY BENEFITS OF USING PROACTIVE TRIGGERS

Proactive triggers always provide your bot with more accuracy and customer satisfaction. It acts as a bridge between your bot and the user and reduces the communication gap. Thus, it increases customer satisfaction levels and happy clients returning to your business.

- **Improve Customer Engagement**
- **Higher Sales Conversion**
- **Reduce abandonment rate**





- **Automated Greetings**
- **Re-engage the User**

HOW TO USE THE PROACTIVE TRIGGERS

We have briefly explained below how proactive chat triggers are very successful for customer engagement strategy.

- **Personalise your triggers by setting up a very friendly tone.** You can make your conversations meaningfully by using proactive chat triggers based on the country, language and most importantly the intent.
- **Timing a proactive chat is very crucial.** It leads to a successful and seamless conversation with relevant suggestions which improves customer engagement.
- **Offer a relevant solution by identifying if the customer's query is sales or support related.** Your goal should be to meet your customer's needs by knowing their preferences.
- **Keep a human handover for example speak to an agent ready** to take the conversation, once the user engages with the trigger message.

HOW TO ADD REPLIES

Once you have set the triggers or questions, you must add replies so that the bot can give you the replies. Replies are pre-defined responses that your chatbot will offer when you trigger a question. Usually, one intent will have one text reply.

Under the **[Response]** section you will find the **[Reply]** option. The **[Reply]** section includes the following options.

- **Replies**
- **Pictures**
- **Gallery Card**
- **Suggestions**

Replies: To add a text reply simply click on the **[Reply]** button and you will get an option to add your **[Text Reply]**. The text replies you are adding should match the list of triggers to get proper responses from the Bot that you are creating. The more you add close replies to triggers for a specific intent your ChatBot will work more efficiently. You can keep on adding the **[Text Reply]** simply by pressing the **[Enter]** key. Click on **[Save]** after adding the replies.



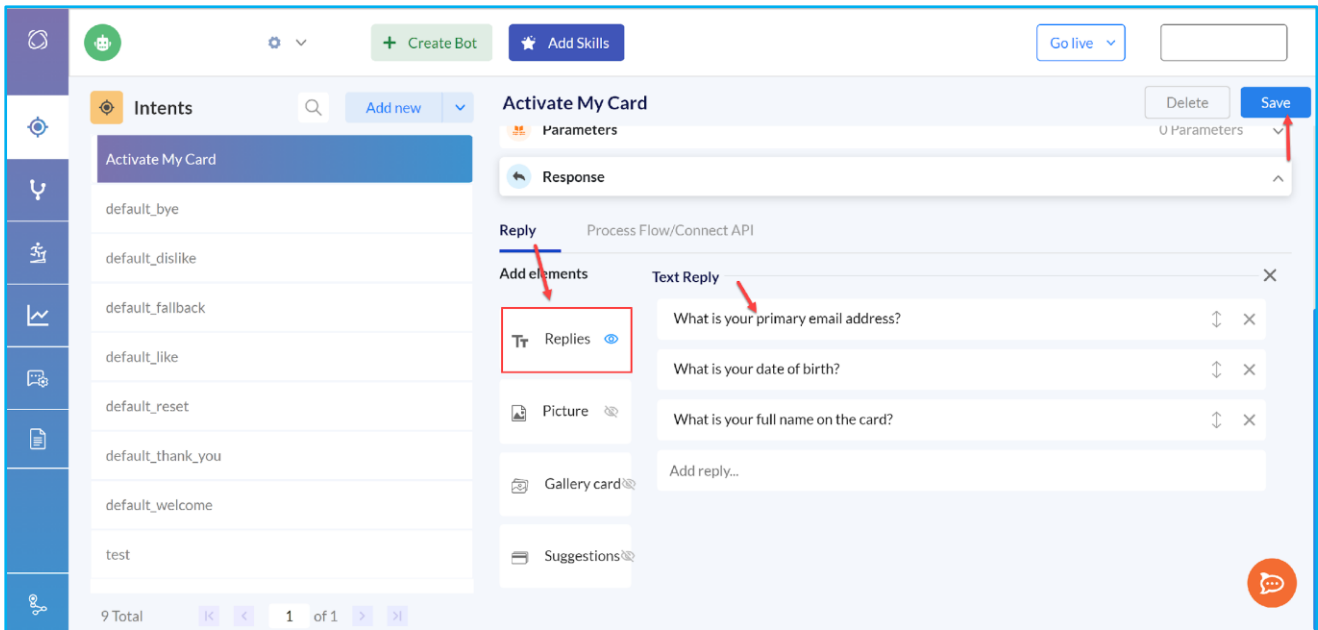


Figure 17: Click on the Reply button and add Text Reply

You can add **<new Message>** code where the text reply has multiple options. If you apply this code the ChatBot will give the responses with a slight delay and in a separate line. **Here is an example.**

- Text Reply: What type of card do you want to activate? Is it **<new Message>** Debit or Credit Card?

Picture: Apart from the text reply you can also add **[Picture]** in the **Reply** section. **To add a picture simply click on [Picture]** and in the **Picture** box drag and drop the picture. You can also click on the **[Browse]** option to select the path if it's saved locally to your machine. We support **.jpeg, .png and .svg** file format. We strongly recommend you keep the image aspect ratio of 3:2 for better picture quality.

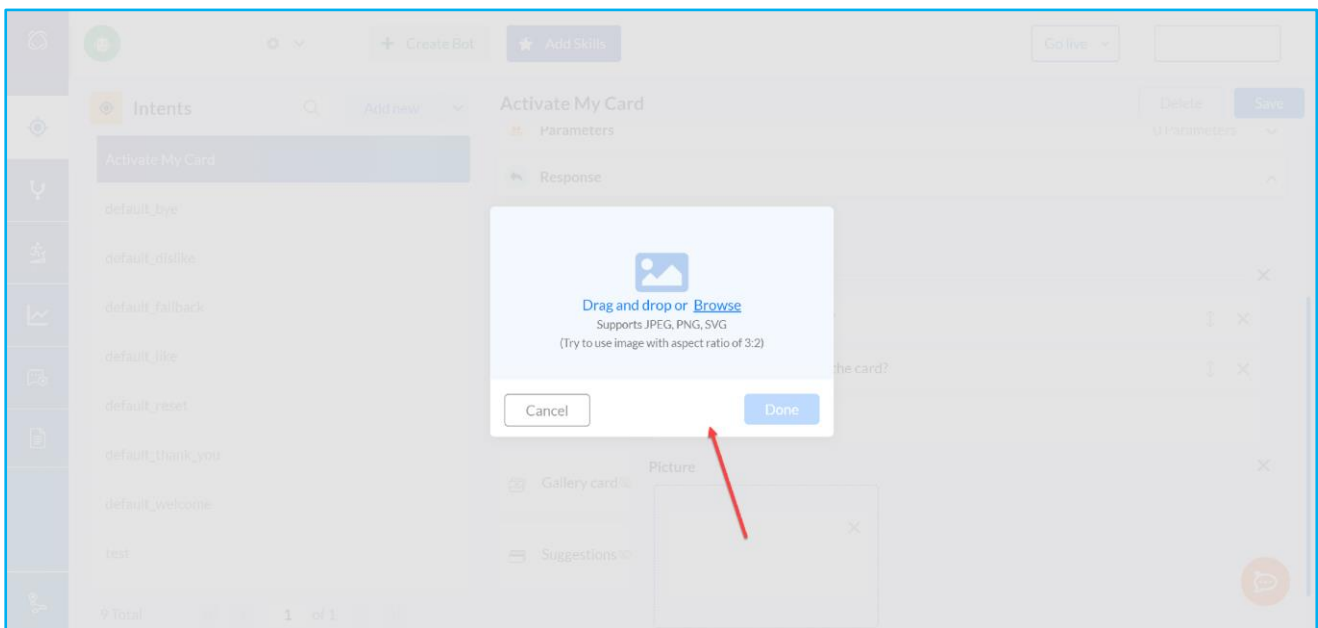


Figure 18: Add picture in the Reply section





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Gallery card: You can add a Gallery card quite similar to Picture. However, the Gallery card has a couple of additional options. The gallery card which you have added is displayed by the chatbot below the Reply text bubble.

In the Gallery card section, you need to add a [Title]. You can also add a **[Sub Title]** and **[Description]** of the card which you have added. The inputs will be shown in your chatbot.

- **Add buttons:** The **[Add Button]** option allows to enter the URL, Postback and Text option.
 1. **URL:** This option is available to enter the URL.
 2. **Postback:**
 3. **Text:**

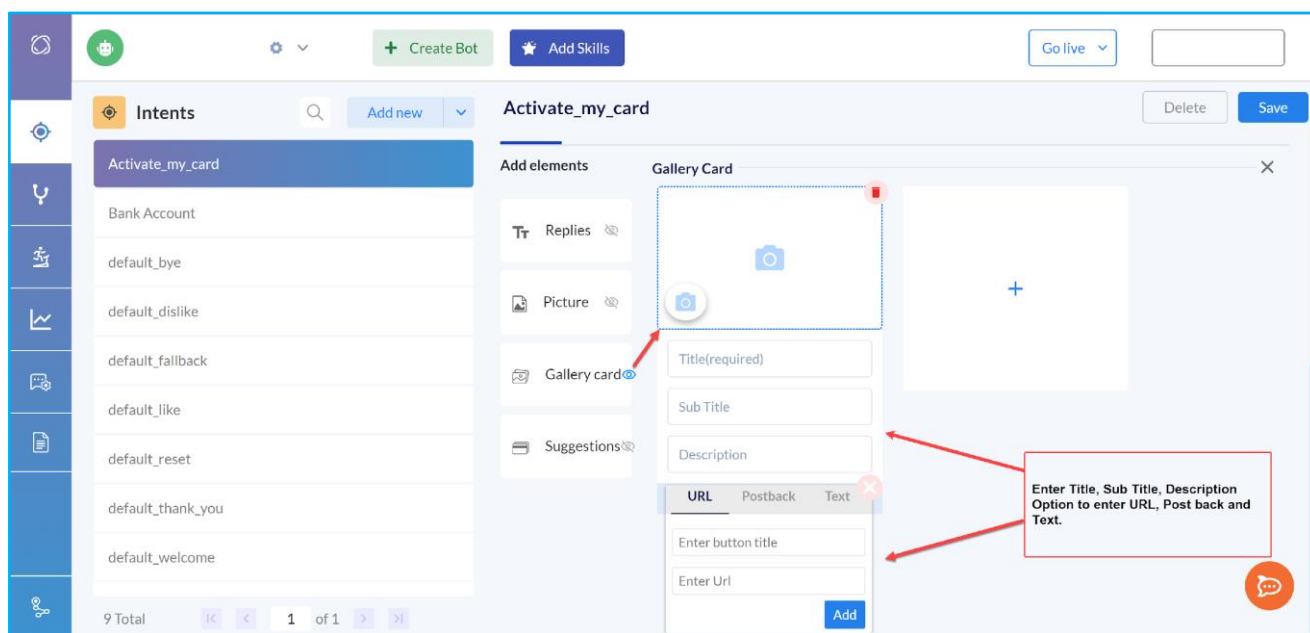


Figure 19: Multiple options in the Gallery card section.

This will show up after the Text Reply.

Suggestions: This option is extremely important in terms of building the Chatbot by using AI. Suggestions are mostly used related to the intent. The suggestions you add in this section will appear when you run the Chatbot. You can add one or more **[Suggestion]** which is displayed below the **[Reply]** section. The suggestions you add will help you to go along with the flow of the interaction in the Chatbot.

The content of the suggestion is interpreted by the bot as new user input and it will activate a new intent provided that the text in the **[Suggestions]** box has been inserted as a **[Trigger]** for the specific **[Intent]**.

Now in cases where the Bot's scope includes multiple topics which could be potentially be quarried in similar ways.

We strongly recommend you to add suggestions to all the intents that could be by this similarity and to have these suggestions cross-references the Intent you might not have meant. **Here is an example:**

We have 2 Intents let's say, Intent **A** and **B**. Add a suggestion along with lines like "Did you perhaps mean B?" in addition to the response for Intent A and "Did you perhaps mean A?" in addition to the response for the intent B if Intent A and B are potentially in conflict.





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Once you add the [**Suggestion**] you must click on [**Save**].

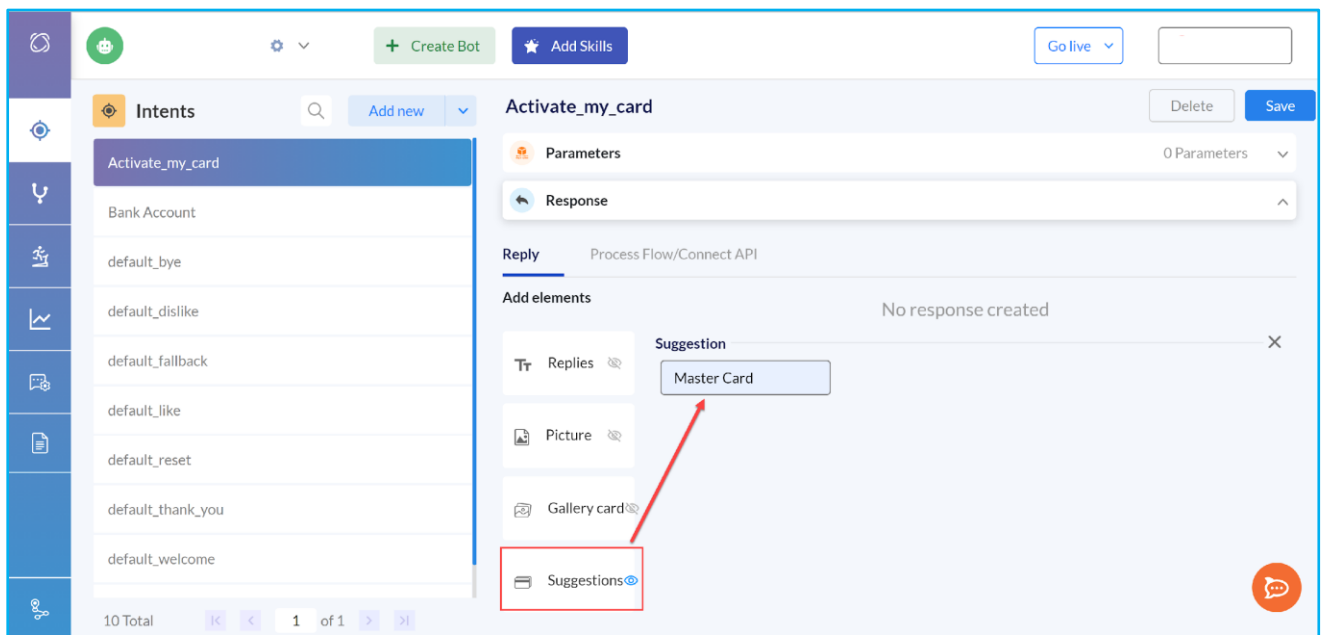


Figure 20: Add suggestions by clicking on the [Suggestions] button.





ABOUT CONTEXT

Contexts are often used to figure out the user’s intent in a chatbot. Context enables your conversational AI to personalise its outputs using relevant information from user inputs and answers, historical data and previous chats and all other sources of data gathering.

HOW TO ADD CONTEXT

To customise the intent you can use the **[Context]** option. To access the **[Context]** option, first, select the correct intent against which you want to add the **[Context]**.

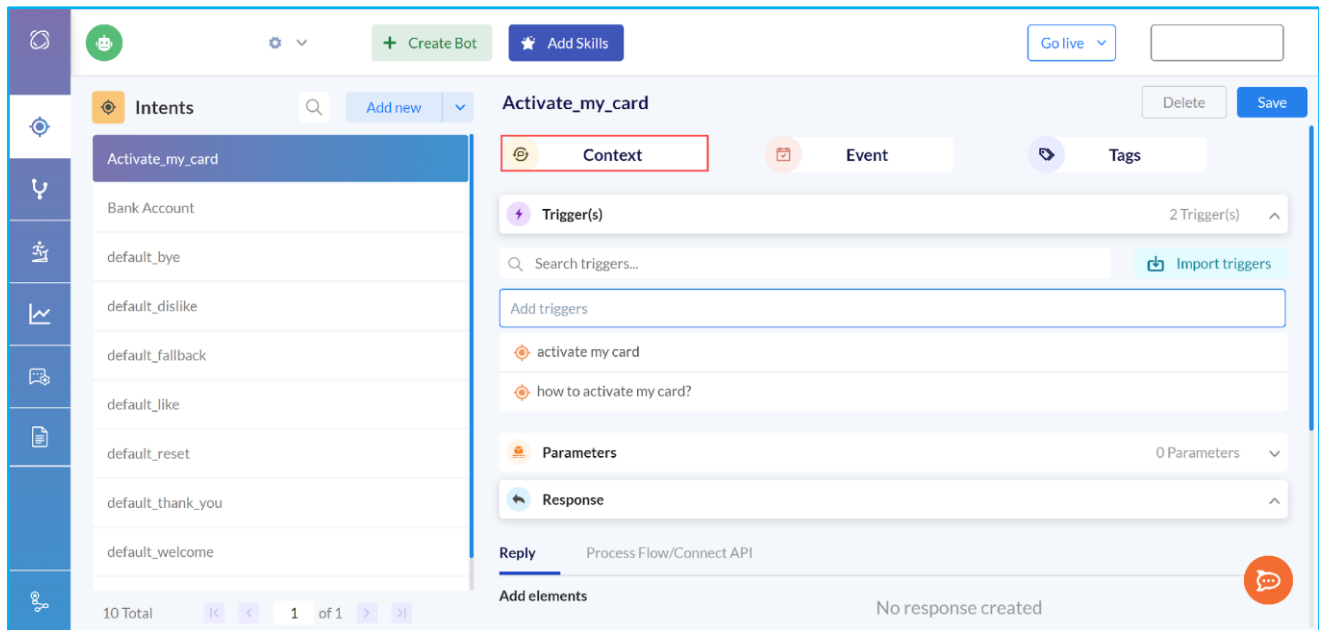


Figure 21: Context option against a specific intent

The feature allows you to link the Intents to each other. So to create the flows of Intents that can only be triggered in a specific order. Context can be very useful for the instances in the case of the bots which guides the end-user through several flows entirely through the Suggestions, in which all the flows can be configured from start to finish. Context option allows you to ensure that specific intent is never triggered unless another intent or a series of intents has been triggered before. To understand how the Contexts work **here is an example**.

We have two intents, let's say Intent A and B. Both the intents are linked with through the Context. Now Intent A includes a **[Context Out]** which exactly matches with Intent B’s **[Context In]**. In this scenario **[Intent B]** will only be triggered if **[Intent A]** has not been triggered first.

So **[Contexts]** allows you to easily manage any split in the conversation. If you wish the bot you have created to be able to lead the user through two or more separate types of conversation depending upon the answer provided by the user.





ADDING CONTEXT IN AND CONTEXT OUT

Context can be added to any Intent simply by clicking on the **[Context]** button as described above. You will have two fields when you click on Context as shown in figure 14.

- 1. **Context In**
- 2. **Context Out**

First, select the Intent and click on the **[Context]** button at the top of the page and you can type either the **[Context In]** or **[Context Out]**. After entering the name in the [Context In] or [Context Out] press enter. Now you must click on the [Save] button.

However, the newly added **[Context]** will not affect the Bot unless it is linked to at least one other intent (by adding Context Into that intent in the same way). To do that, you must ensure that the text entered in one Intent’s Context matches the type in the Context of the Intent you wish to link exactly.

Note that, in this instance, the matching is case-sensitive (i.e.whether in letters are upper-case or lower-case). If using **[Suggestions]** to guide the end-user, the user needs to ensure that the text contained in the suggestion in Intent A is present in the trigger list of the Intent B that has been linked through context.

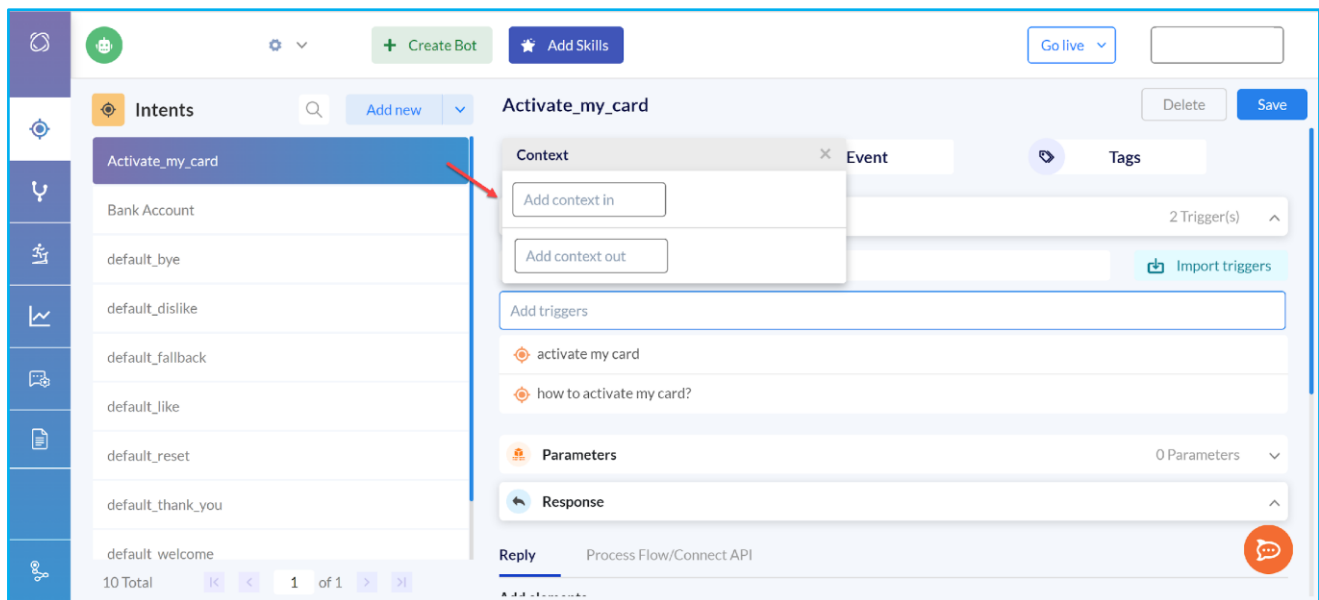


Figure 22: Option for adding Context In and Context Out

HOW TO ADD AN EVENT

This feature allows intents to be activated by something other than a trigger. While creating your bot if you wish to add by an opening salutation e.g. a default welcome message you can add the Event.



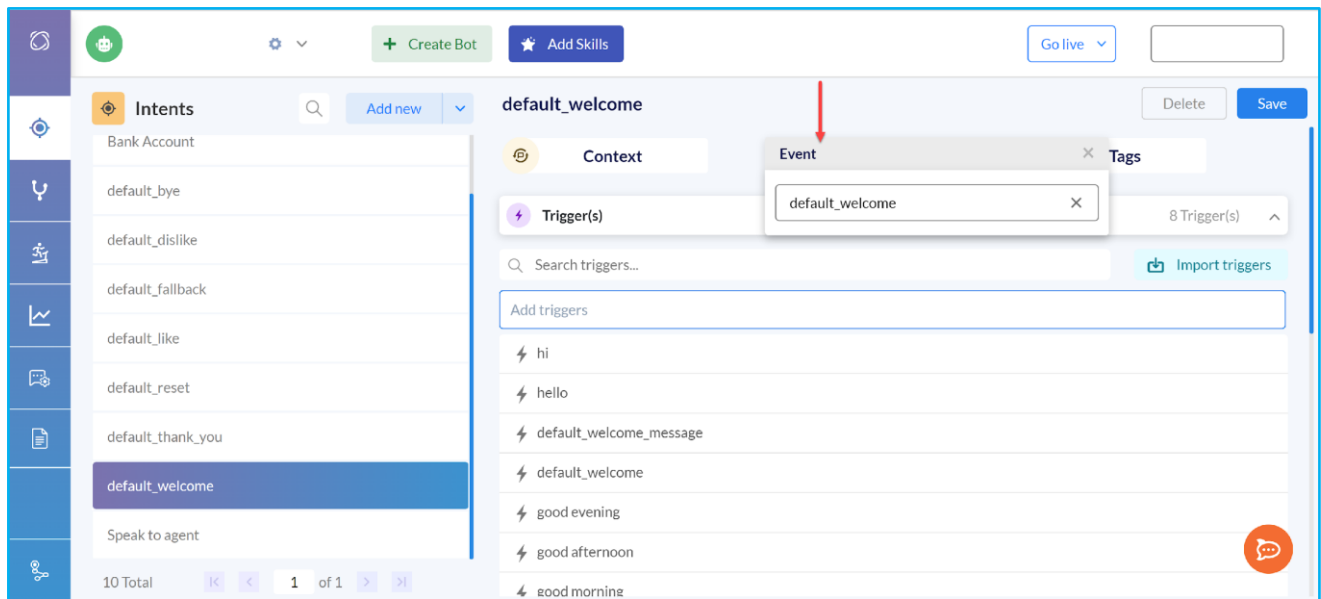


Figure 23: Adding an Event

HOW TO SET PARAMETERS

You can also set the Parameters to function the chatbot more efficiently with more accuracy. Triggers and Replies are required for an Intent to function. Other than these two, the system allows you to add Parameters also. You can add one or more parameters based on how your bot should respond.

You need to follow the steps to add a Parameter. Under the Parameters option, you must toggle the bar to enable the **[Required]** field, otherwise, the **[Prompt]** fields will be disabled.

After enabling it, you have to enter the details of the **[Parameter Name]**, **[Entity]** and the **[Prompt]**. In general, a parameter's name is a string of characters that the user wishes to choose. This string name will then be useful to have the system refer back to a parameter's value.

So once you enter the Parameter's name, you need to define the **[Entity]** and you can add how it should prompt within your chatbot. There are 5 types of system-defined **[Entity]** available in the dropdown. While creating an Entity, it is mandatory to have one **[Sub-Entity]**. Note that, based on the **[Parameter Name]** and the **[Entity]** you have selected the bot is going to give the reply. The **[Entity]** you have entered here will affect the functioning of the Parameter so that the Bot can recognise the valid answers.

Prompt: When your parameter is required the **[Prompt]** field will be active. So the bot will start prompting whatever you have entered in the **[Prompt]** field. The prompt message will be communicated from your bot to the user. And based on the user's input the flow will move forward. So that's why when you are creating a parameter within your bot make sure that you are giving a logical prompt so that your bot can proceed further by communicating seamlessly. In case if your bot doesn't receive the expected answer from the user, the same will be prompted back again.


To understand which system-defined entity you should choose for a specific parameter we have given a detailed illustration.

Here is an example.





Parameter	Entity (System Defined)	Prompt
Name	sys_any	What is your name?
Date	sys_date	What is your date of birth?
Email	sys_email	What is your email address?
Phone	sys_number	What is your phone number?
Amount	sys_currency	What is the balance on the account?

 If you are not sure which entity should be used for a parameter, use [sys_any] to avoid any restriction. The system will then recognise any inputs as a correct response for the Entity.

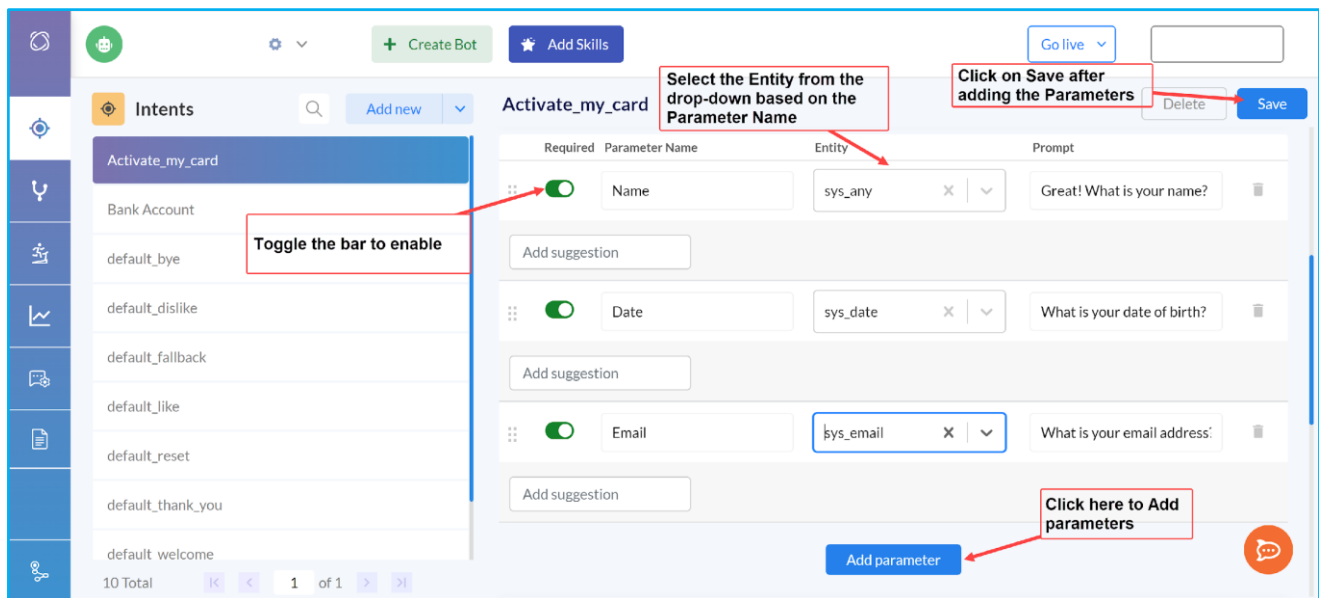


Figure 24: Add one or multiple Parameters against an Intent

NON-REQUIRED PARAMETERS

Non-required parameters do not need to be filled for your chatbot to correctly display a reply. An Intent with non-required Parameters will ignore these parameters when these are triggered and directly display in without prompting the user for any additional information.

Note that, if a Parameter has not made it **[Required]** the **[Prompt]** will be deactivated. As a general principle, non-required Parameters are to be considered only in case of connection with very specific actions.



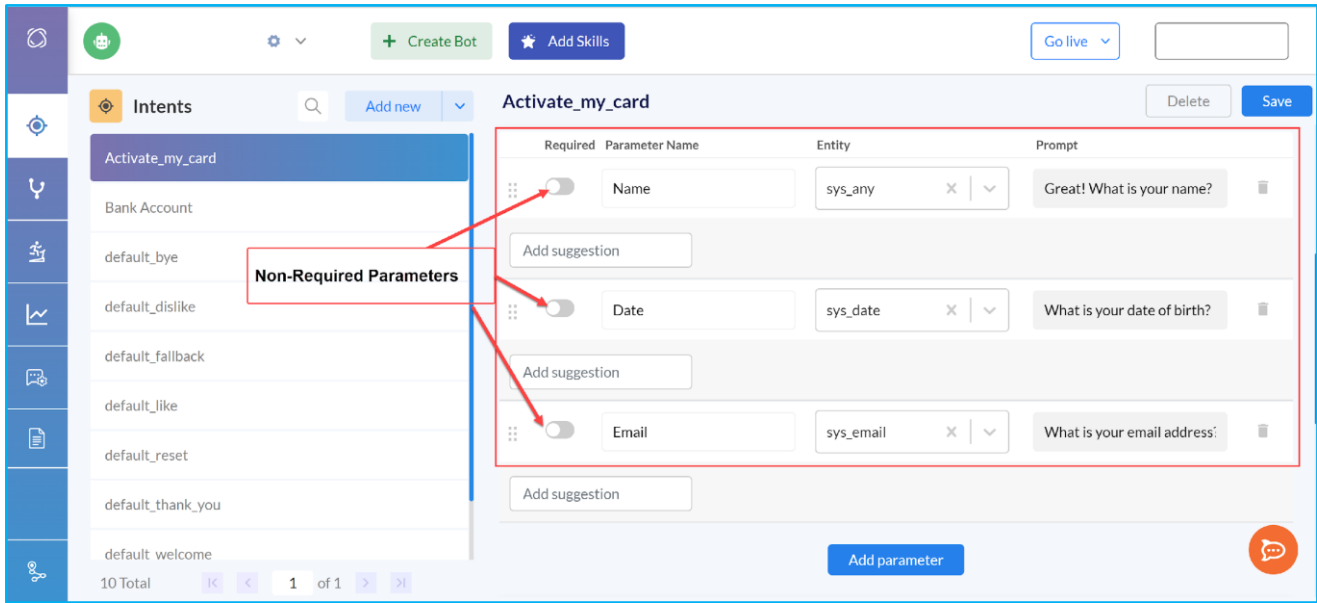


Figure 25: Non-required Parameters

DELETE PARAMETERS

If you want to delete the parameters which you are not using anymore you can simply delete them. To delete the **[Parameters]**, click on the **[Trash]** or **[Delete]** icon.

Note that, after deleting the **[Parameter]** you must click on the **[Save]** button.

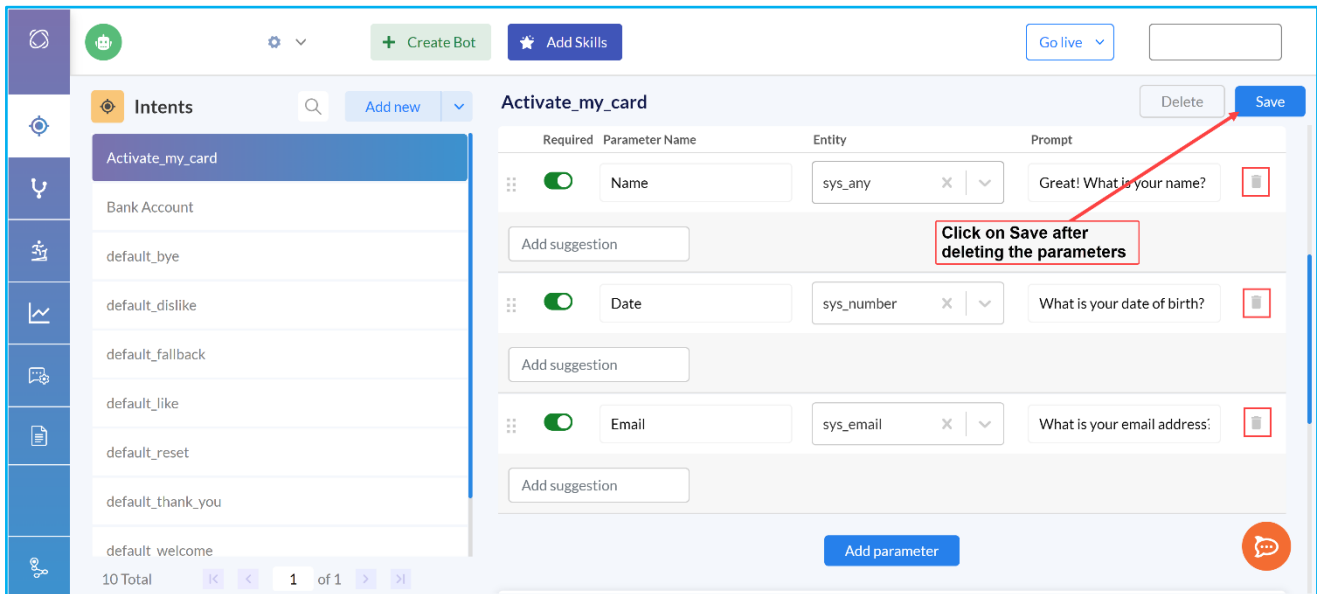


Figure 26: Deleting the Parameter







ENTITIES IN CHATBOT ADMIN

Entities are a feature of the ChatBot Admin which impacts several areas of the bot's structure. You can add your products and product features and synonyms for them. This allows the AI to understand your business and products in a better way so that the bot you are creating can give an accurate reply. This section includes adding a new entity and sub-entity.

HOW TO ADD A NEW ENTITY

To create a new **[Entity]**, click on the  button at the left panel. On the right-hand side, you will see the text box to add a new entity. You need to enter the name of the **[Entity]** and click on **[Save]**. The name of the entity will be displayed once you add it from here. Also, you can edit the name of the **[Entity]** by clicking on the existing entity name and you must click **[Save]** to retain the changes you have made.

All future Entities will be added to this list and will be displayed in alphabetical order after the page is refreshed for the first time. If you keep on adding the **[Entity]**, it will display 20 entities on one page and the rest will be carried over to the next page.

You will have a **search** option [] to locate the **Entity** from the **Entity List**. The option is available on the left panel under the list of entities. After clicking on the search button you can enter the desired entity name which will essentially pull up the entity name from the list.

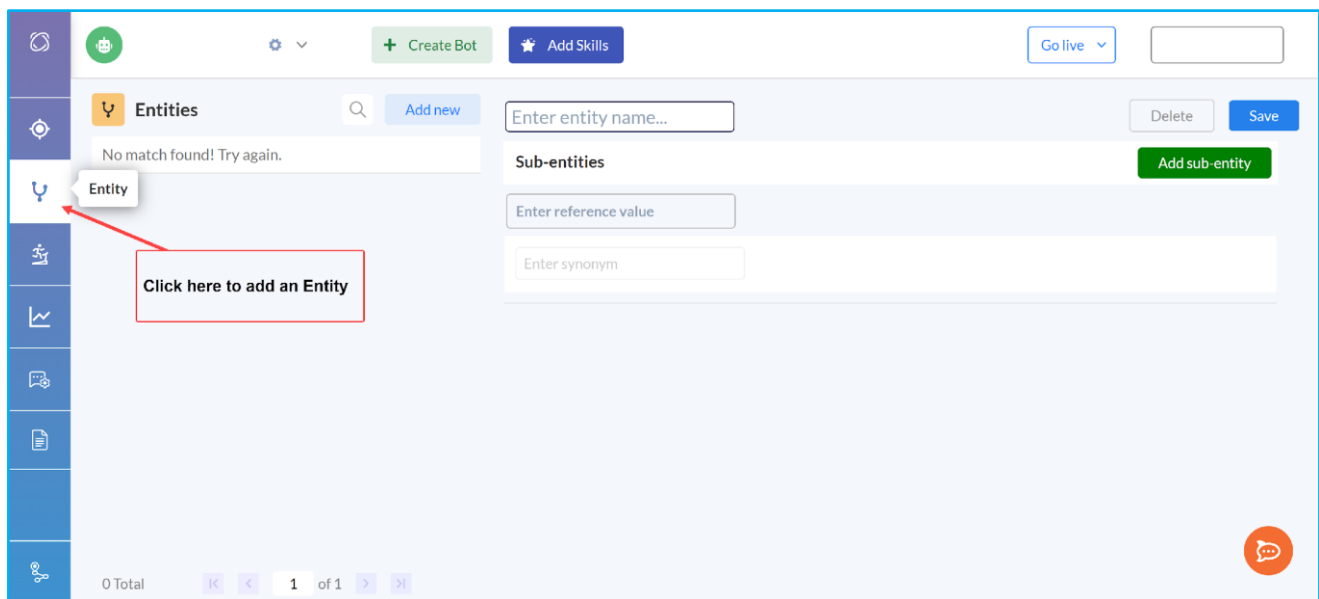


Figure 27: Enter the name of the Entity and [Save] it.

HOW TO CREATE A NEW SUB-ENTITY

Once you have created the entity, you need to add the sub-entity. **Sub-Entities** are the second level of the Entities' hierarchy. All the **Sub-Entities** that belong to the same Entity are recognised by the **SSE-Chatbot admins** as valid responses whenever the bot requires input to belong to that **Entity**. However, the system will be able to differentiate between the different **sub-entities** and provide the response which is specific to each of them.

Moreover, you can add a series of Synonyms to each of the **Sub-Entity** so that your bot can give an accurate response.





User Manual of ChatBot Admin

To add a Sub-Entity, click on the **[Add sub-entity]** button and add a sub-entity against a specific Entity. Before you add the sub-entity, on the text box it prompts as **[Enter reference value]**.

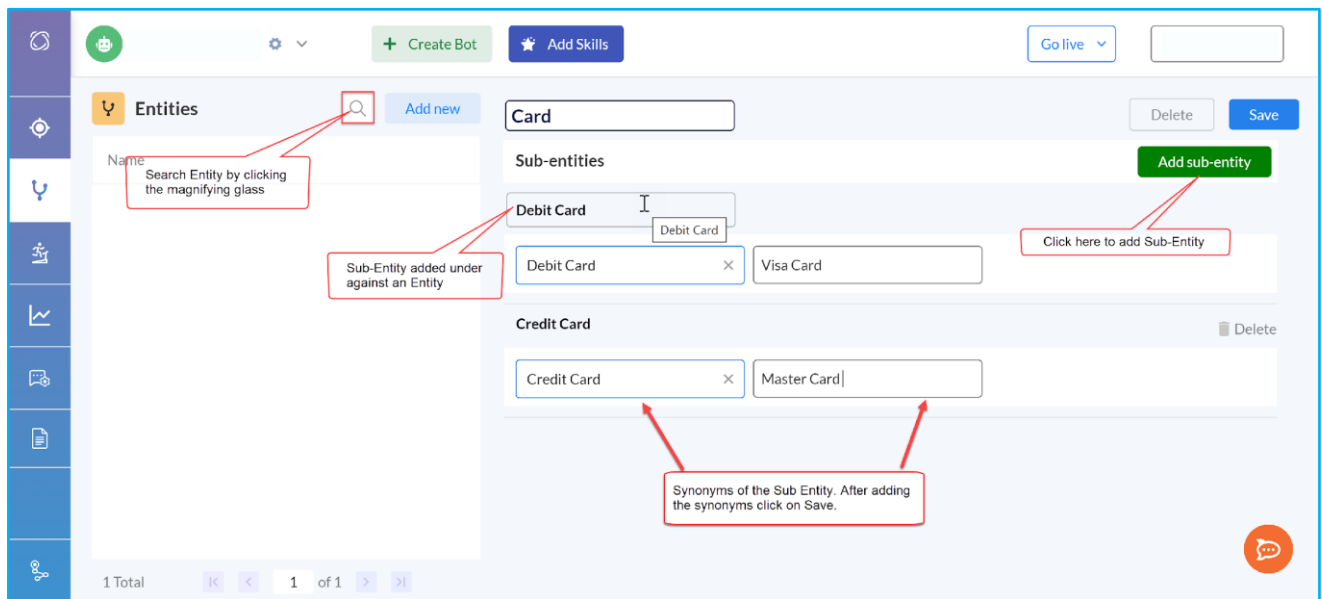


Figure 28: Adding Sub Entity and Synonyms

After adding an **[Sub-Entity]** against a particular entity, you can add the **synonyms** of the **[Sub-Entity]** that you have added.

You can add a series of **Synonyms** to each of the **Sub-Entity** to make the recognition of the **Sub-Entity** to full the **Product Engine** and other **Parameters** to hand subtle variations and streamlined the process of adding the Triggers to all Intents, as an **Intent** will be triggered by any **Synonyms** of a **Sub-Entity** if that has been added to the **Triggers List**.

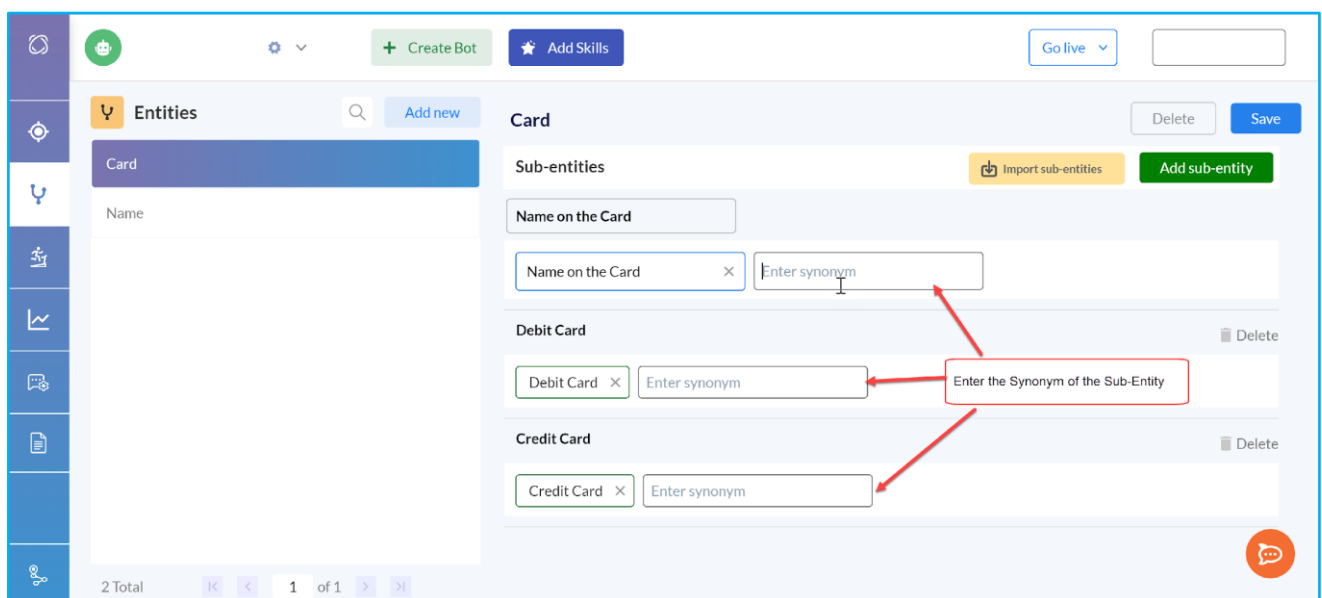
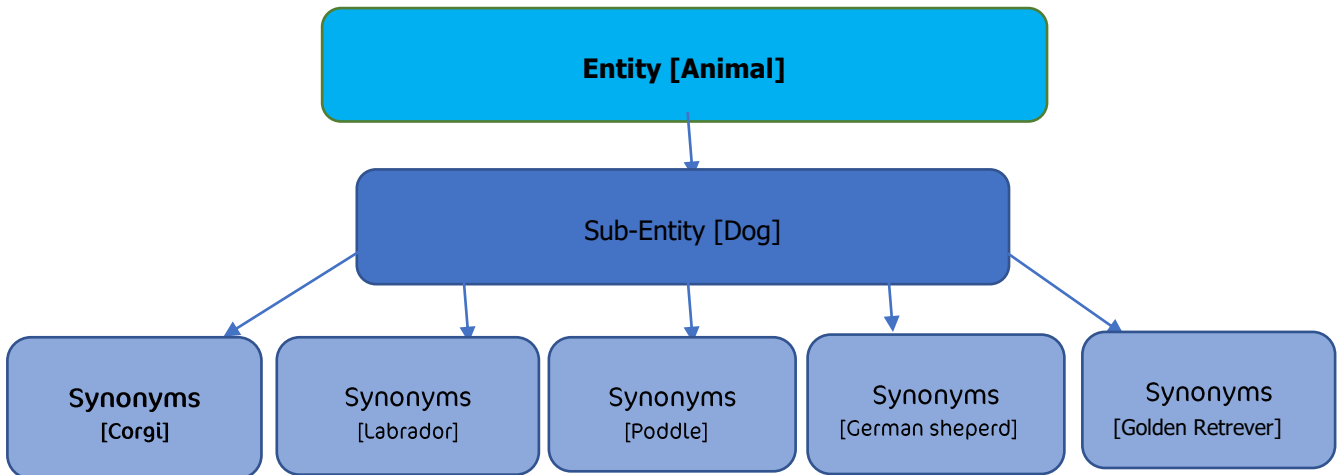


Figure 29: Enter the Synonyms of the Sub-entities you have added.

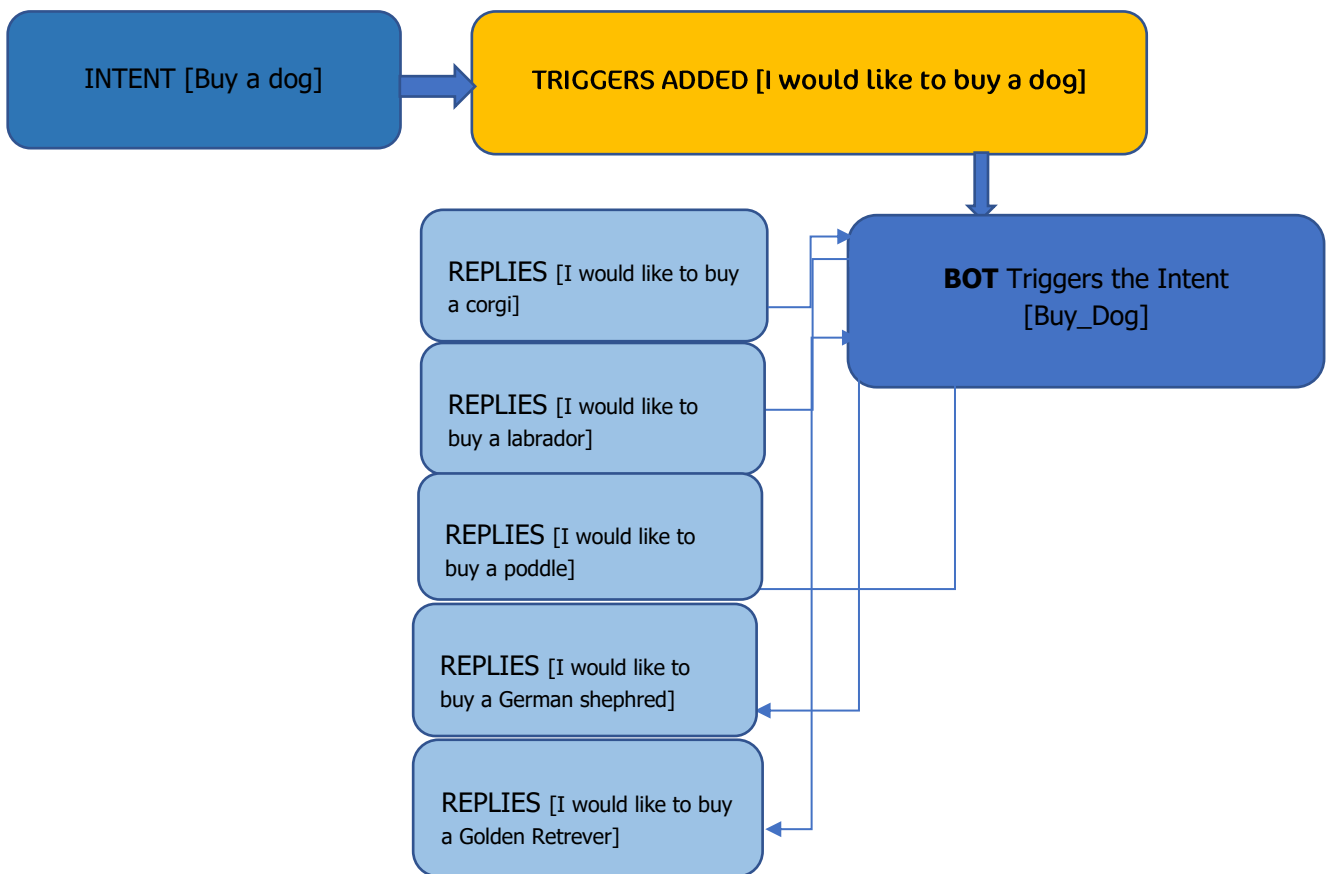




About the Sub-Entity and Synonyms works, **here is an example.**



Sub-Entity and Synonyms are related to Intent and Triggers in Chatbot (Illustration):



HOW TO IMPORT SUB-ENTITY

We have a feature to import the list of sub-entity which will reduce your time and effort. Moreover, it will help you to build the Chatbot more efficiently.





User Manual of ChatBot Admin

You can create the Sub-Entity on the fly, however, the import option will allow you to import the list of **[Sub-Entity]** which you have already created while creating the Chatbot.

To import, click on **[Import sub-entities]** just beside the **[Add sub-entity]**. This import routine helps you to download the sub-entities you have already created in a **.CSV** file format.

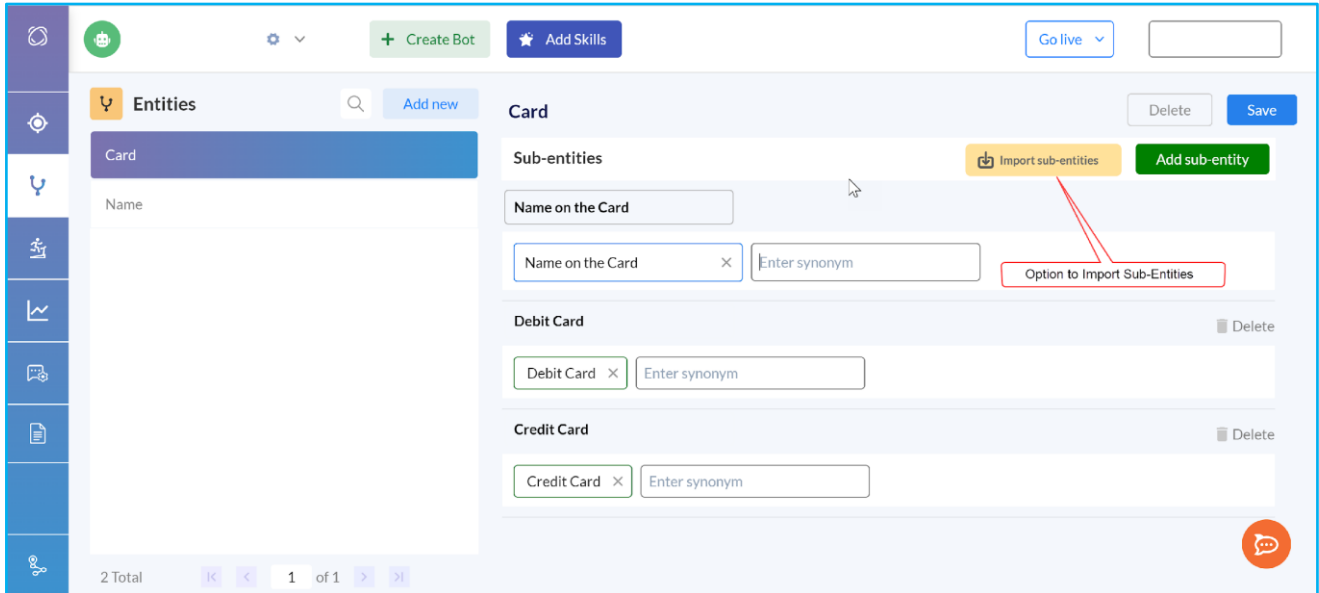


Figure 30: Option to Import Sub-Entity

Click on the **[Import sub-entities]** the following screen will appear on your screen.

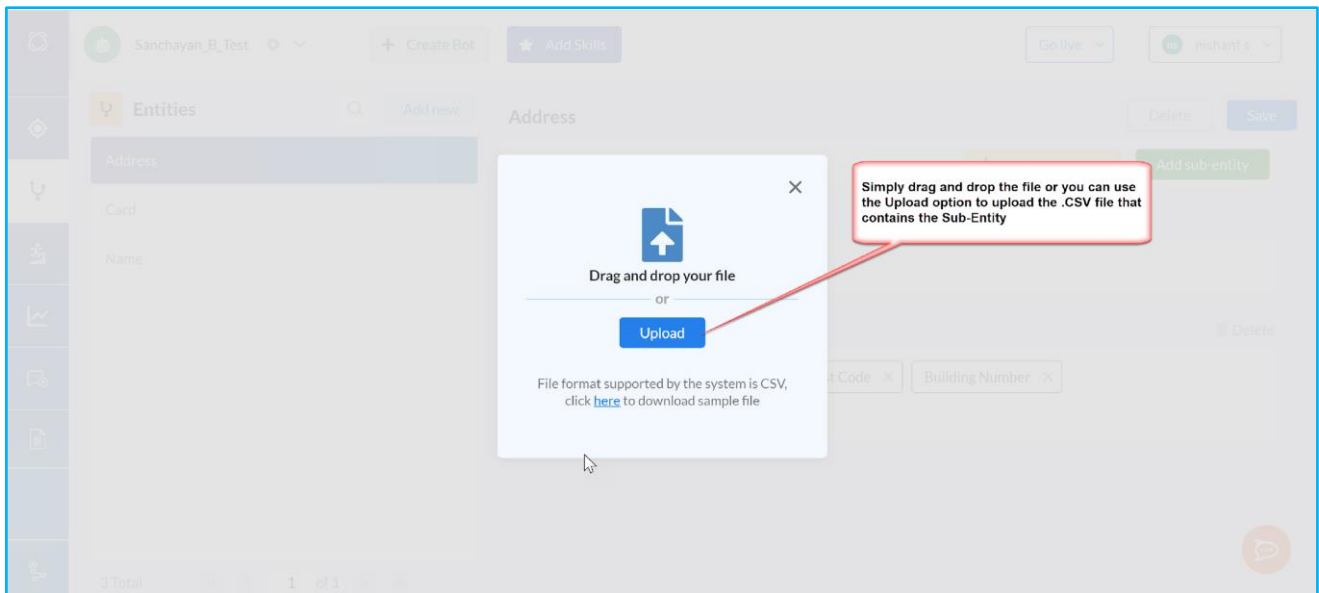


Figure 31: Drag and drop or Upload the CSV file to import



To upload the Entity in .CSV file in Chatbot Admin, you can find sample files in the following link. Click here to see details.

<https://drive.google.com/file/d/12WPUBpMJdnGyo5R35cuVSMYgp216Kxsd/view?usp=sharing>





User Manual of ChatBot Admin

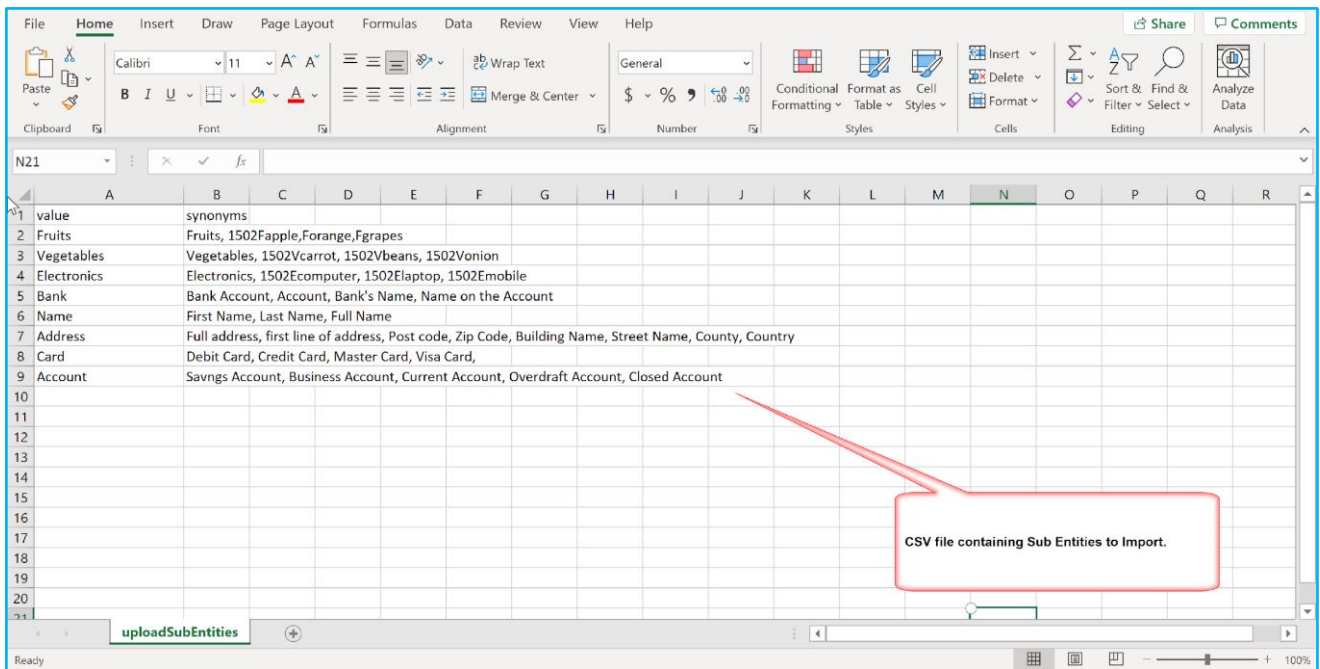


Figure 32: Sample CSV file to Import Sub-Entity

While the import routine is In-Progress you will get an information message at the top. After successful import, you need to **refresh** the page.

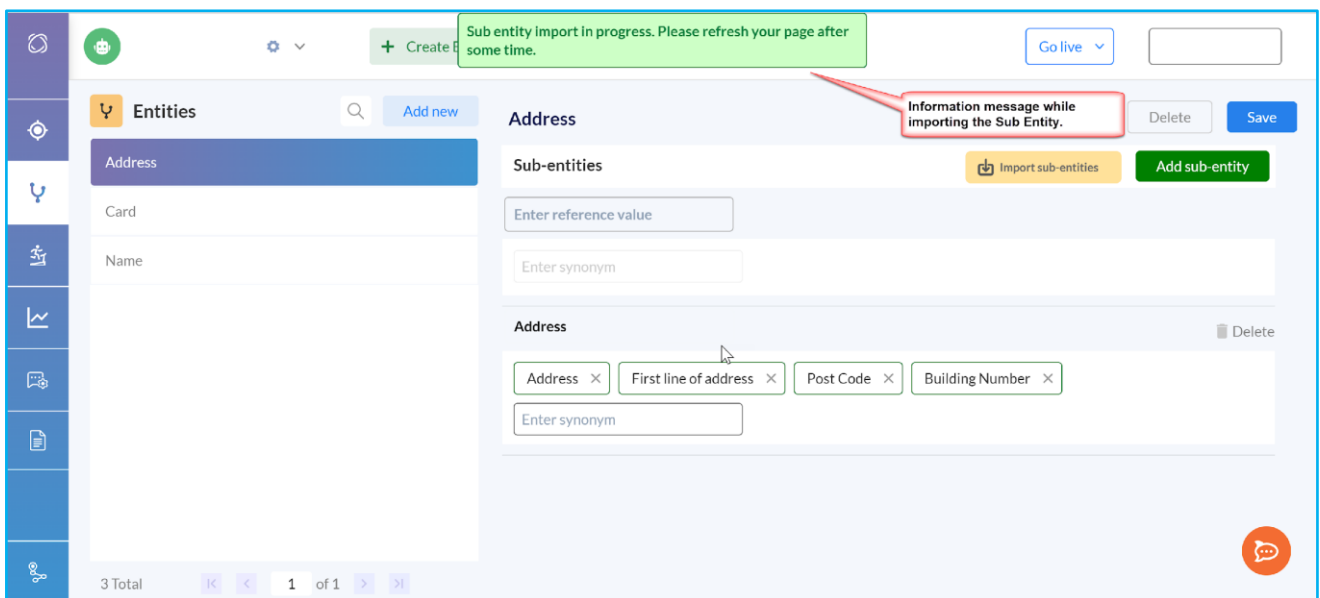


Figure 33: Information message while the Import routine is running.





TRAINING IN CHATBOT ADMIN

The **[Training]** page helps your bot which you have created to train. Here you can see all the chat sessions between the user and your chatbot. To access this page simply click on the icon on the left-hand panel below the **[Entity]** icon. To improve the accuracy further, you can select the individual logs from the chat sessions and choose which intent the user's message will go to the next time.

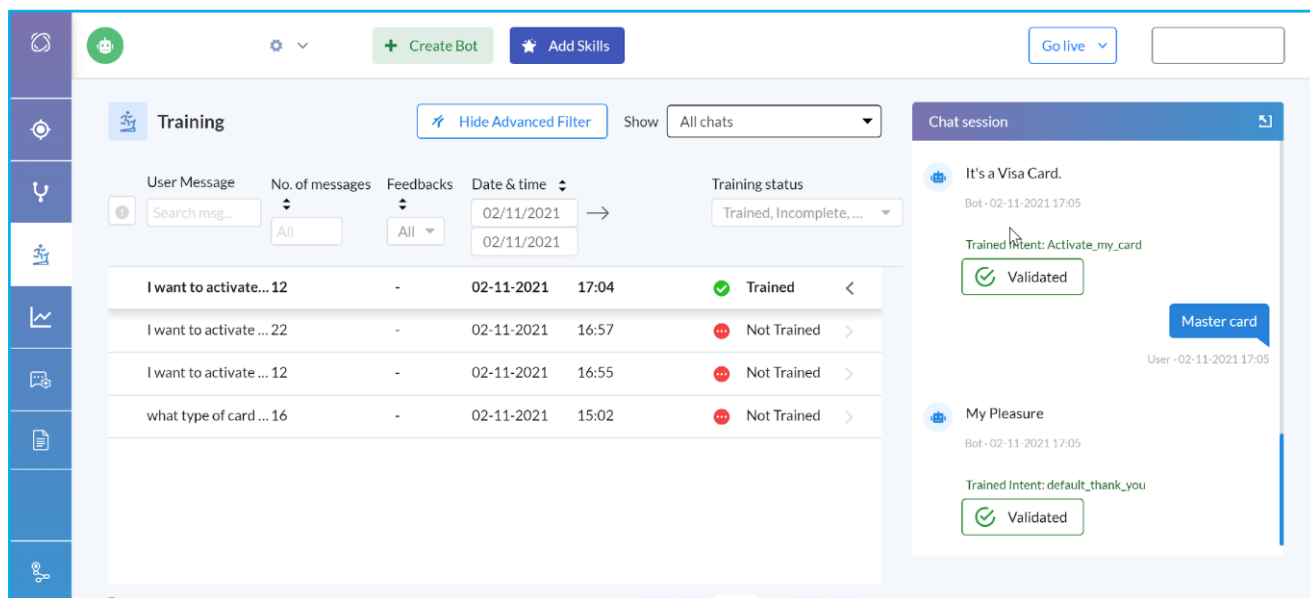


Figure 34: Overview of the Training page

HOW TO TRAIN YOUR BOT

The Training pages gives an option to see All Chats which include **Real Conversation [Default]**, **All chats** and **Unhandled requests**. In addition to facilitating the tracking of the overall traffic that the Bot you have created has been able to handle. The main purpose is to allow the user to train the Bot by manually reassigning incorrect responses to the appropriate Intent.

We strongly recommend you perform this routine regularly to improve its overall accuracy by learning from the manual re-assignment.

By default, the following screen will appear for the first time which shows the Real Conversation as default including the following options.

- **User Message** [To search message]
- **No of messages** [With a spinning button]
- **Feedback** [With a spinning button where the default is All]
- **Date & Time** [With a To and From range]
- **Training Status** [That includes **Trained**, **Incomplete**, **Not trained** options. However, the default will be **All**]



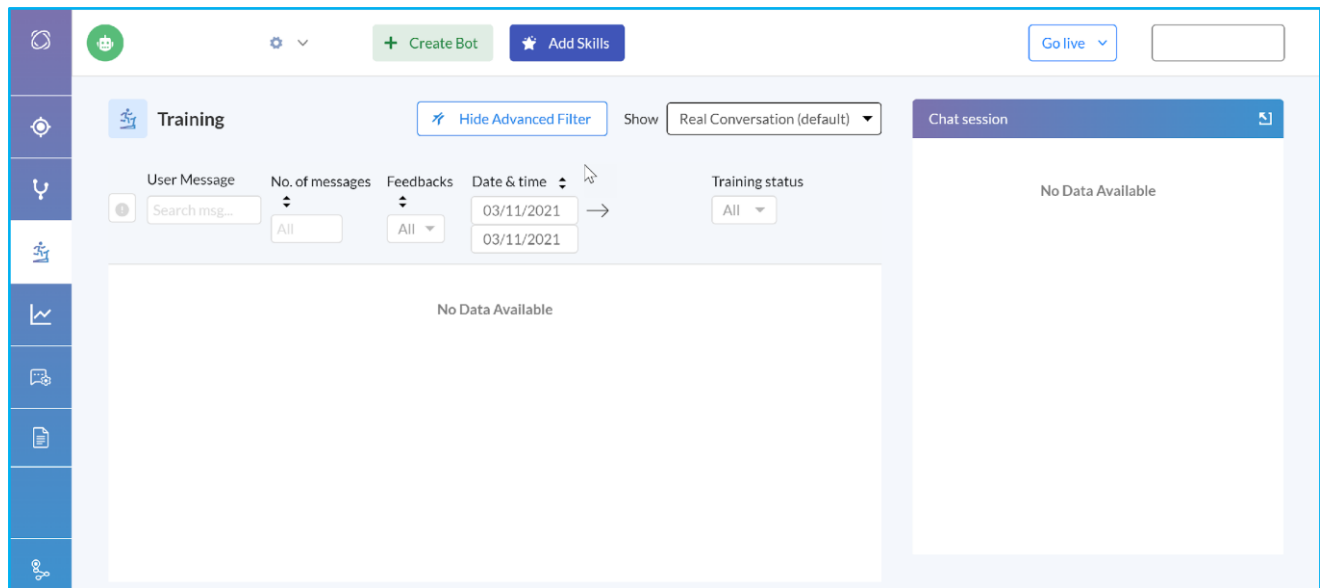


Figure 35: Options available on the Training page

If you click on the show **[All chats]** and select a date range, all the chat sessions will appear on the screen based on the date range. This page is divided into 2 separate sections. On the left hand, it will provide you with a complete list of the chat sessions that your bot has handled throughout its life. The chat session appears in chronological order with a session ID (i.e. all the interaction with your chatbot and the end-user between the time the end-user opens the bot’s window and the time this window is closed). On the right-hand side of the page, the user’s input is displayed. It contains the content of each session, depending on which session has been selected by the user on the left-hand side.

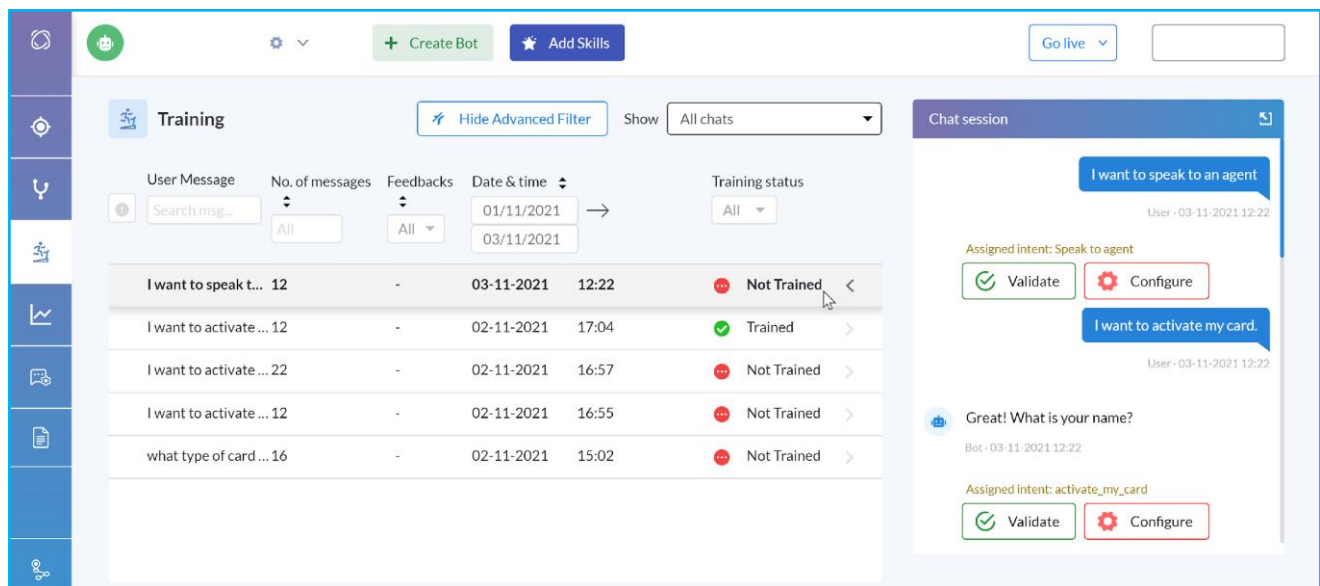


Figure 36: Chat sessions, validating and configuring on the Training page



Always train your Chatbot with enough data. This will help them to strike a meaningful conversation.





ABOUT THE CHAT SESSION WINDOW

To train the chatbot that you have created it's important to train the chatbot from the training page. On the right-hand side of the page, the chat session window will appear. In the first place, the chat session window will be blank, unless you select a chat session. The chatbot will presume that there is no data available to train.

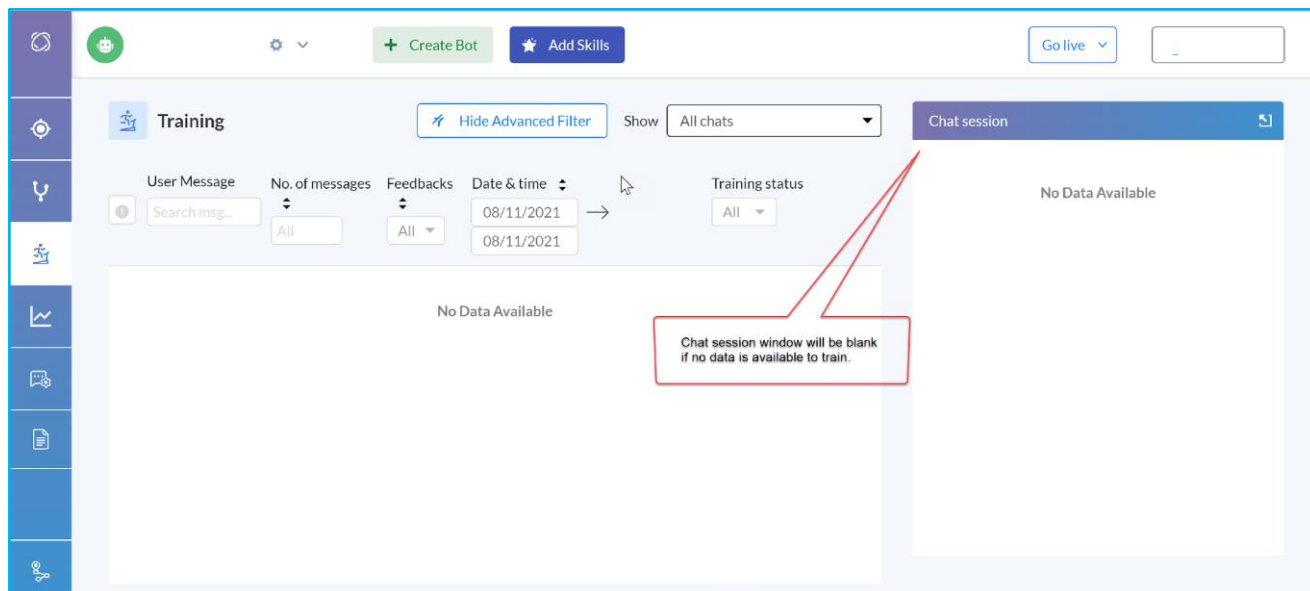


Figure 37: Chat session window at the right-hand side.

The chatbot training page includes the following:

Field	Description
Show	This option allows you to show the chats. Based on your requirement you can choose the option for Real conversation [default], All chats and Unhandled requests.
User Message	This is a search option. This will help you to search for the exact intent used in the Chat messages.
No of messages	
Feedbacks	
Date & Time	The Date & Time calendar option allows you to search Today's, Yesterday's and Last 7 days messages. Note that the start date can't be greater than the end date. You can manually enter the days as per your requirement or you can use the calendar option.
Training Status	This shows whether the chat sessions have been trained or not. If you wish to select the record categorically or by all chat sessions use this option. This includes 4 options [All], [Trained], [Incomplete] and [Not Trained] . Apart from the All option, each option has an icon beside the status of the chat session. Each option comes with a tick box to select.





HOW TO VALIDATE THE TRIGGER FROM TRAINING

To train the responses from the bot you will have 2 options as **[Validate]** and **[Configure]**. This is a very useful feature in terms of accuracy. The options will be available in the chat session window which contains the Intent that has been triggered by the user.

This pop-up may contain further Intents that have not been triggered, however, the bot you have created took into consideration before making its final decision and selecting a different one. This training feature can be useful in many ways even without performing any manual re-assignment. For example, it allows you to identify an Intent that was triggered incorrectly and to troubleshoot to fix this issue by removing certain Triggers from that Intent. It also allows you to identify the name of the Intent that provided a determinate response. For example, if there is a typographical error you can correct it in the response. If the trigger is accurate click on the **[Validate]** button.

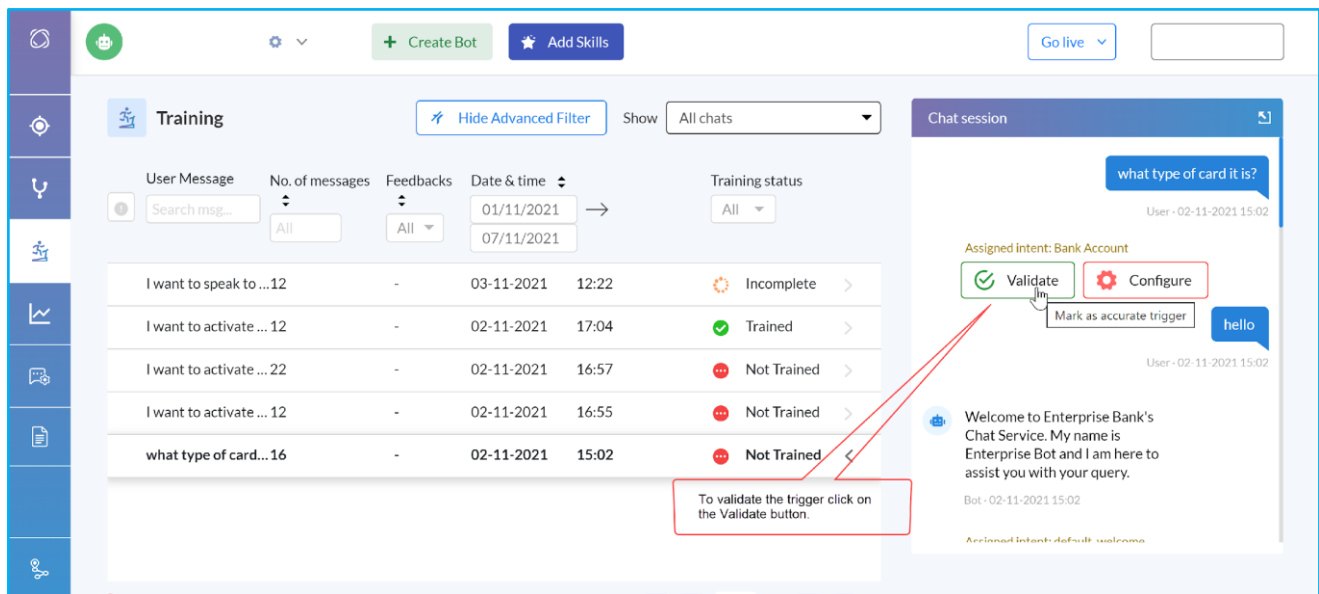


Figure 38: To mark an accurate trigger click on the Validate button.

HOW TO CONFIGURE THE INTENT FROM TRAINING

In case, if the assigned intent is incorrect or if you wish to change the Intent click on the **[Configure]** button. You can reassign any **Triggers** to a different Intent that you consider correct by clicking on that Intent's name and then finalising the Training by clicking on the **[Configure]** button. The list of Intent names will appear. Choose the appropriate Intent. Note that, while you configure make sure you are selecting the correct Intent from the list of Intent. Because the accuracy or the performance of the Bot depends on how you are training the bot you have created.

After selecting the Intent, you must click on **[Save]**.



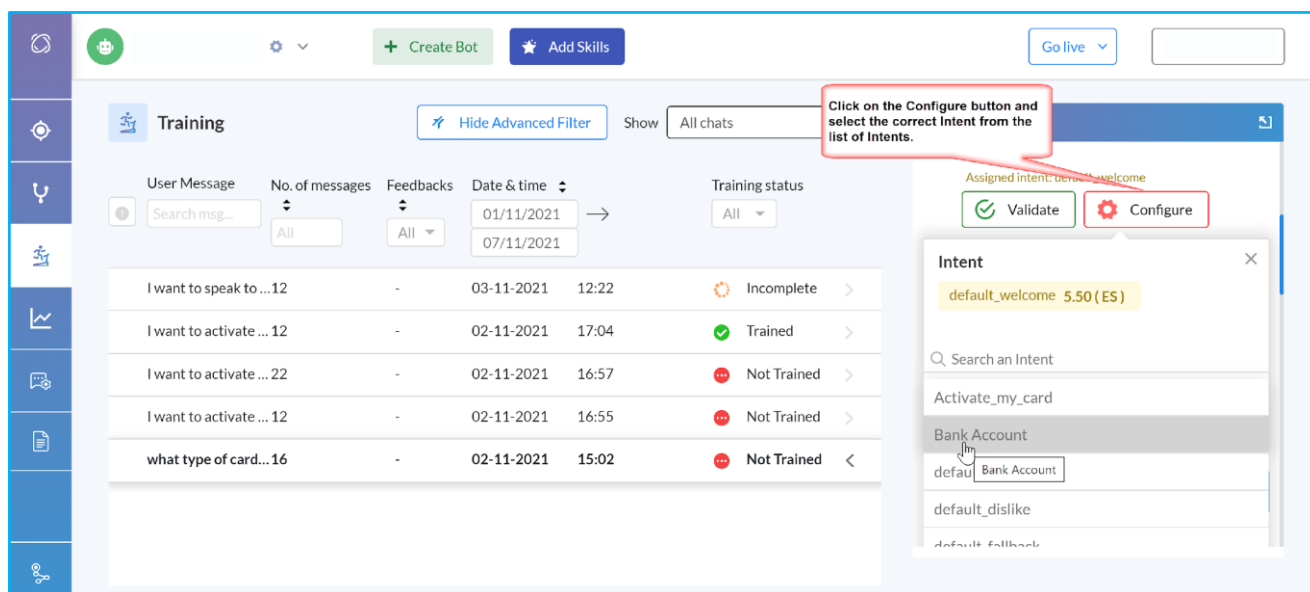



Figure 39: Configuring the Intent from the Chat Session window in Training.

ANALYTICS IN CHATBOT

In Conversational ChatBot Analytics uses artificial intelligence to drive from human speech, both verbal and written. It's a natural language processing [NLP] solution that helps the system to understand and organise the data in such a way so that the insight can be extracted from it.

The Analytics page in Chatbot Admin gives an overview of the customer experience. It also helps you to find out how effectively your bot is performing.

HOW TO ACCESS THE ANALYTICS IN CHATBOT ADMIN

To access the Analytics page simply click on the  button just below the Training icon on the left-hand side. The [Analytics] page shows the message statistics within the specific time range. You can select the start and end date by using the [Select Period] section at the top right-hand side of the page.

This page mainly works as [Dashboard] from where you can see a series of metrics that are collected and displayed automatically. This page also allows you to have an overview of all the questions that have been asked by the user that caused the bot to trigger default fallback and assign these triggers to the correct intent.



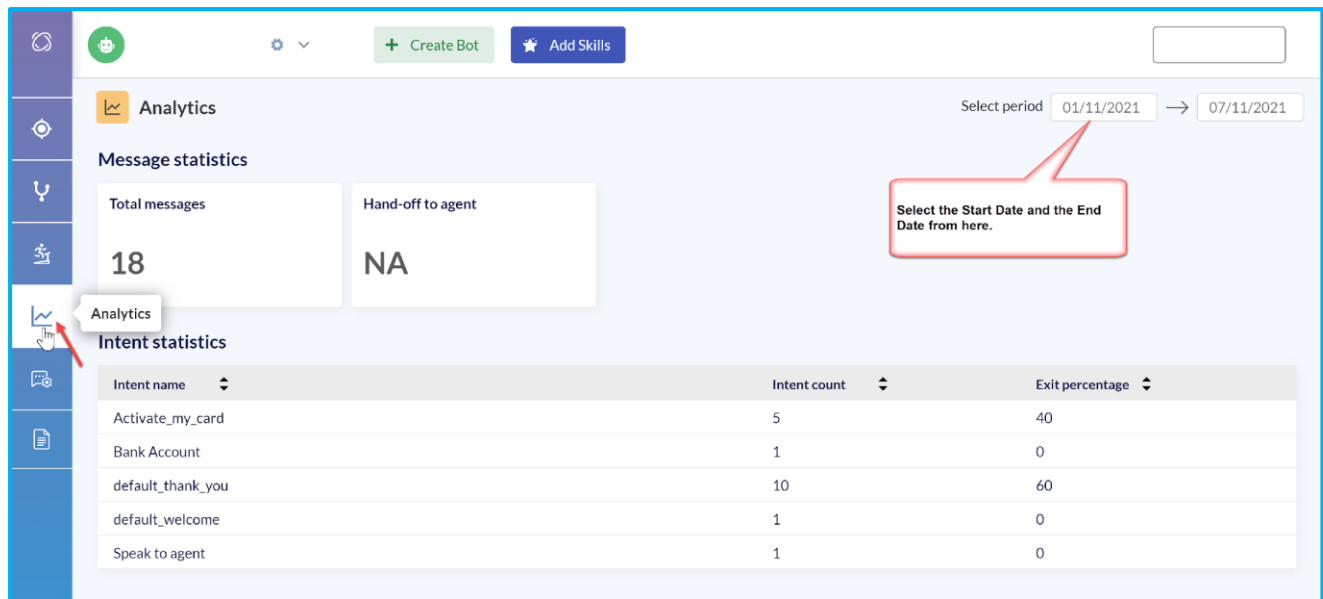


Figure 40: Click on the Analytics icon and select the period

The Analytics page is divided into two categories as **[Message Statistics]** and **[Intent Statistics]**.

ABOUT THE MESSAGE STATISTICS

The message Statistics page contains some relevant metrics about the chatbot's usage and performance. The data displayed on this page refers to a specific time duration. You can select the date range from the top right corner of the page.

Total messages: This shows the total number of messages or interactions between the bot and the user for a specific period.

Hand-off to agent: If the user enters a key phrase such as “**I want to speak to an agent**” or “**I want help from someone**” the language understanding service can provide the handoff intent to the chatbot, indicating that human agent to connect that conversation. So the percentage of transferring the chat session to an agent is displayed here.

However, before transferring the user to a human the user should have gone through a series of questions created by your bot. So, if the percentage of transfer rate to hand-off to the agent is less you can assume that the bot you have created is working efficiently.



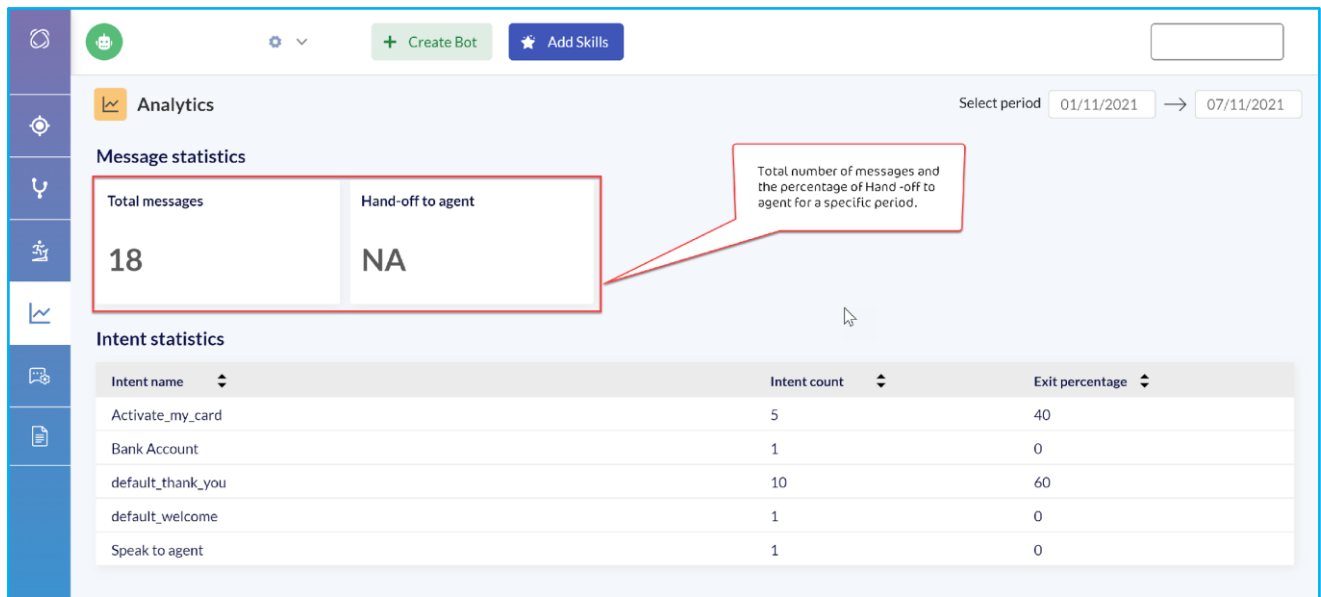


Figure 41: Total number of messages and Hand-off to agent percentage

ABOUT THE INTENT STATISTICS

The second section on the **Analytics** page is about **Intent Statistics**. It shows you a complete list of all intents that have been triggered during a specific period **[Today/ Yesterday/ Last 7 days]**. By default, this list of intent is sorted by frequency. The intent that has been triggered more often is displayed at the top of the list.

Intent Count: You can also view the name of all triggered intents, together with the number of times they have been triggered.

Exit Percentage: A percentage of users that have left the conversation after triggering that specific intent is called **Exit Percentage**. For example, the **default_bye** is likely to have a value for Exit Percentage should be closer to 100 per cent, however, **default_welcome** to have a closer value 0.

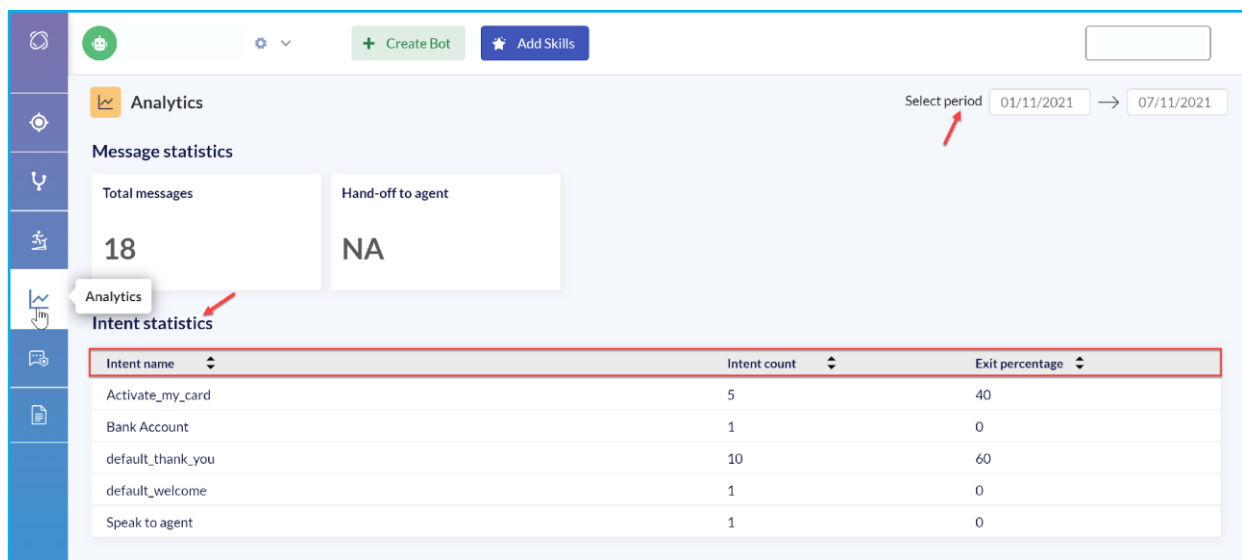


Figure 42: Intent Statistics with Intent Name, Count and Exit Percentage





ABOUT BOTFORGE

A chatbot user interface (UI) is a series of graphical and language elements that allows for human-computer interaction. In a nutshell, it means that users can communicate on their terms. The BotForge section in the Chatbot admin allows you to customise your bot. The BotForge section includes the following menus.

- ❖ [Chatbot](#)
- ❖ [Testing Page Settings](#)
- ❖ [UI Settings](#)
- ❖ [Message/Text](#)
- ❖ Cards
- ❖ Images
- ❖ Frameworks
- ❖ Custom JS
- ❖ Custom CSS

In this section, we will give a full set of instructions on how you can customise your chatbot by using Botforge by using the different options within it.

THE OBJECTIVE OF USING BOTFORGE

The objective of using the BotForge platform is to create a quality chatbot interface. You should aim at the following to achieve a better customer experience essentially which will increase the success rate of the Chatbot.

- Create a personalised branded experience.
- Assist many of your customers at one time.
- Communicate with your customer in a human-like way.
- Better user/customer engagement
- Cross-platform Integration and many more.

HOW TO ACCESS THE BOTFORGE

To access the Botforge from User Admin click on the Botforge icon on the left panel. You will be redirected to the Botforge page.

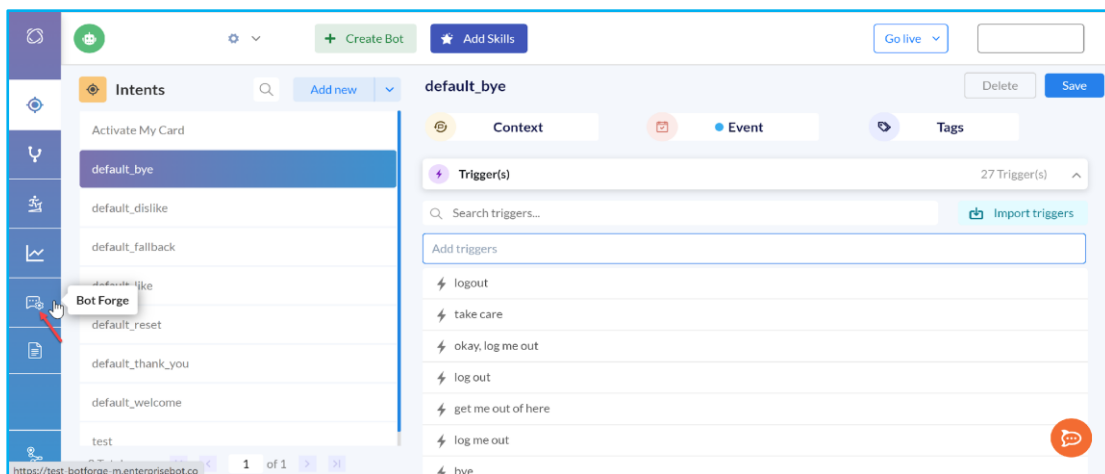


Figure 43: Click on the Bot Forge icon to open the Bot Forge window.





HOW TO LOGIN INTO BOTFORGE PAGE

You need to click on the BotForge icon and you will be redirected to the BotForge login page. You need to enter the credential [User Name and & Password].

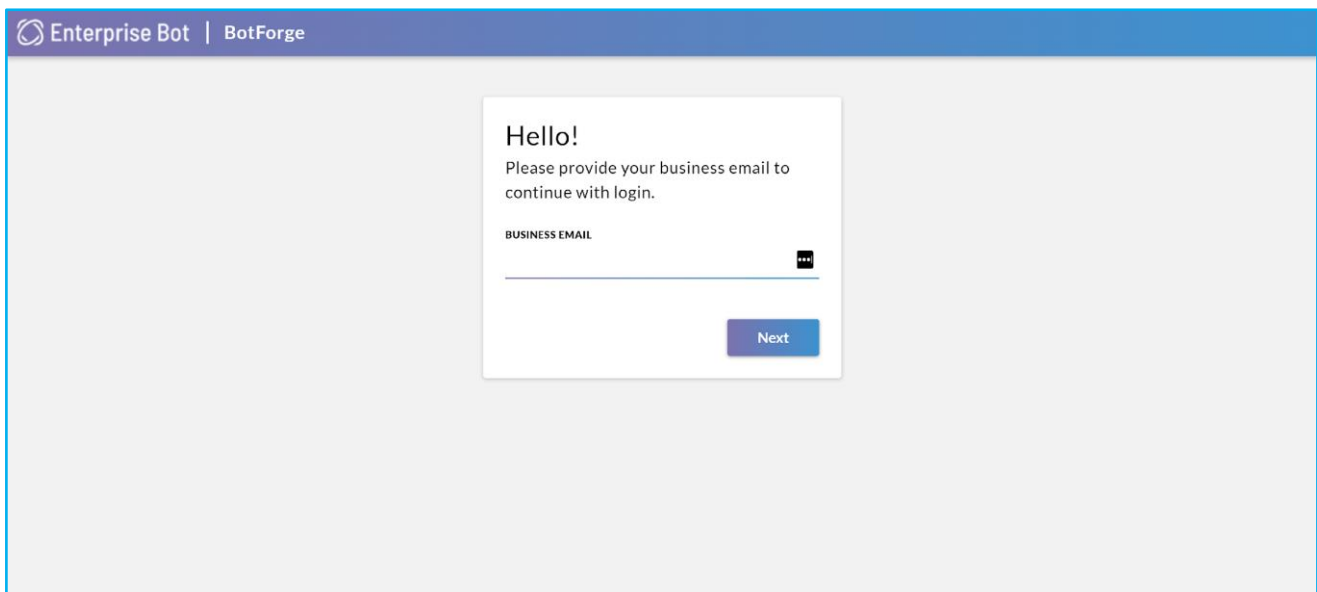


Figure 44: Enter the Email address to Login into Botforge

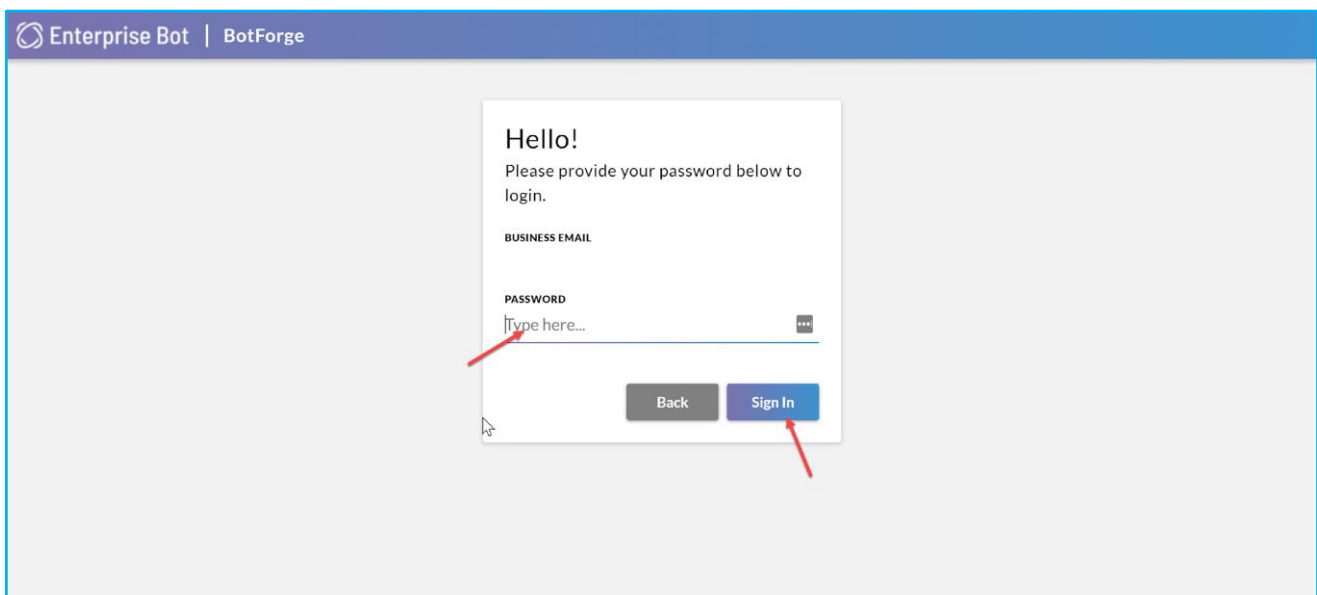


Figure 45: Enter the password and click on Sign In.

HOW TO SELECT YOUR BOT FOR CUSTOMISATION

After logging successfully into BotForge, you need to select the Chatbot you want to customise. From the **[Select Bot]** drop-down you need to select the Chatbot first.



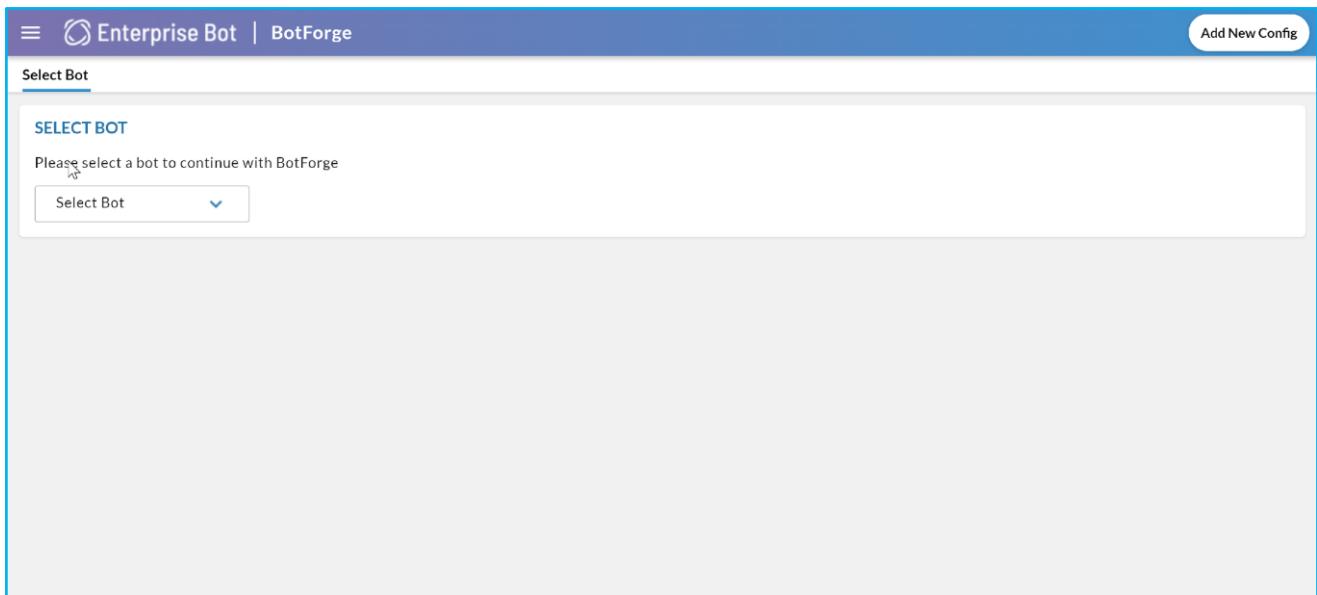


Figure 46: Select the Bot that you want to customise.

HOW TO CUSTOM YOUR CHATBOT

After selecting the Chatbot from the dropdown you will be on the [Make Bot Custom] page. To customise the bot you need to toggle the button so that BotForge allows you to customise the Bot.

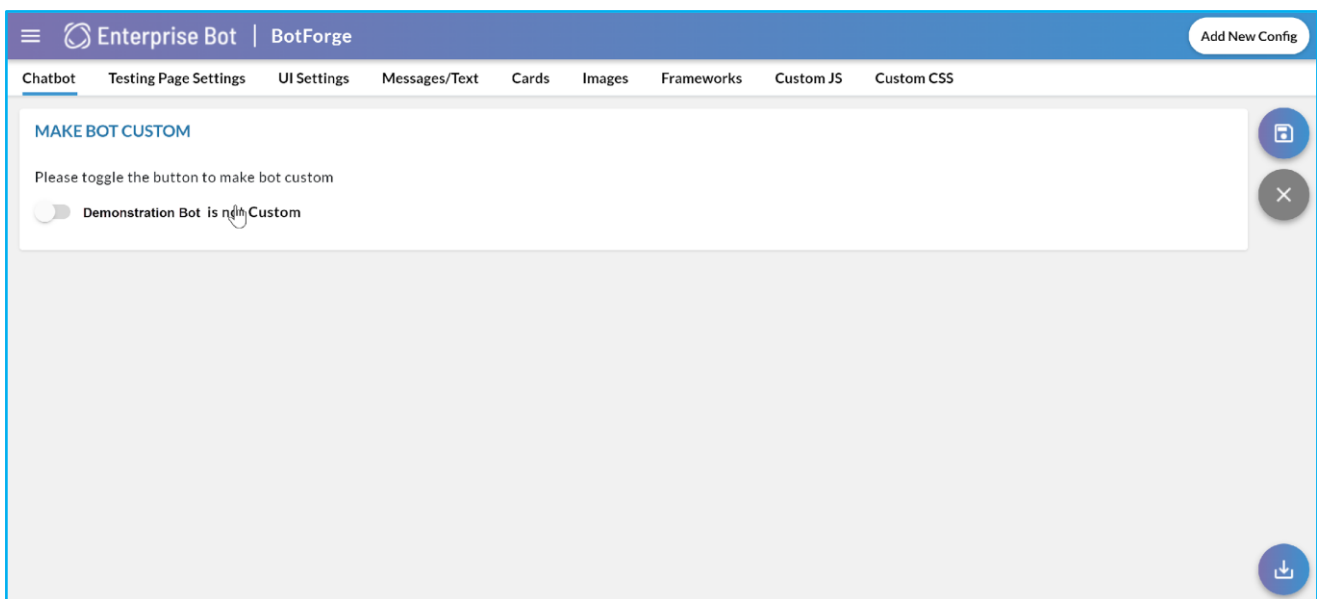


Figure 47: Toggle the button to customise the Bot

Once you enable the option for making the bot to be customised you will be redirected to the following page.



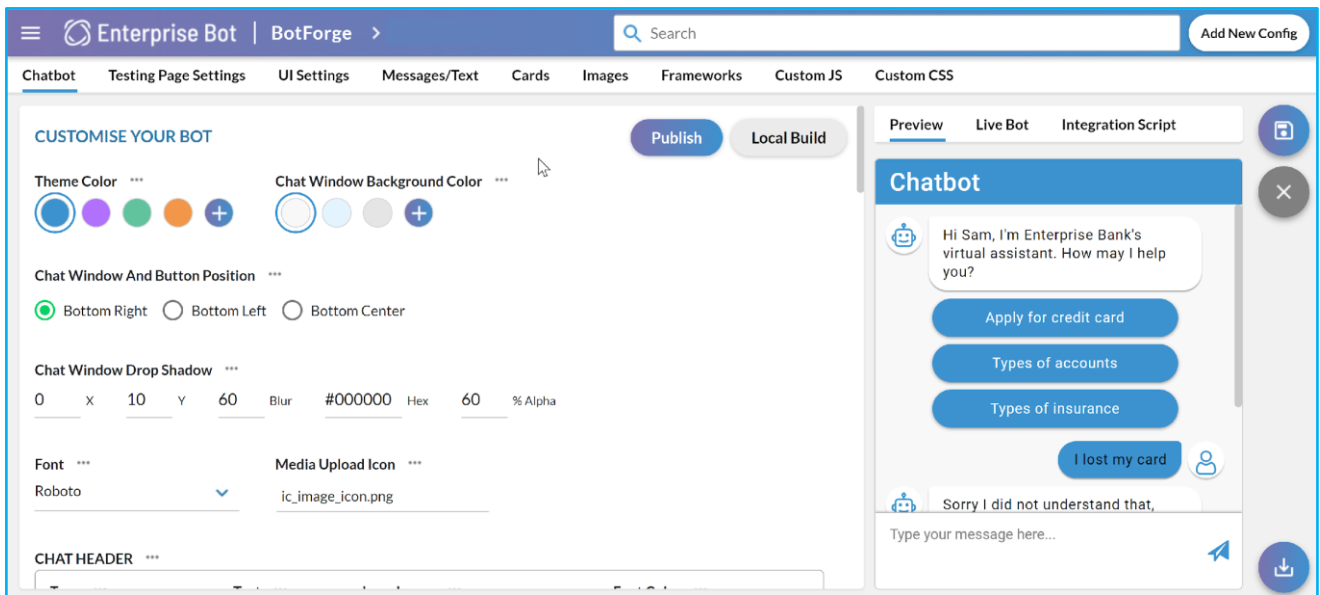


Figure 48: BotForge window

SIDE DROPDOWN MENU ON THE BOTFORGE PAGE

At the top left-hand corner of the BotForge page, you will see a collapse and expand button [3 horizontal lines]. Click on the icon to open the following options.

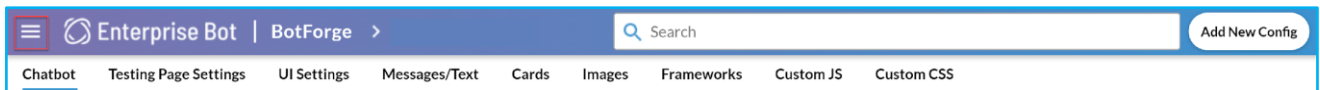



Figure 49: Sidebar icon on the BotForge page.

This  icon shows the user credential, i.e. the user-id of the SSE-ChatBot Admin. It's the same credential through which you have logged in to the BotForge platform.

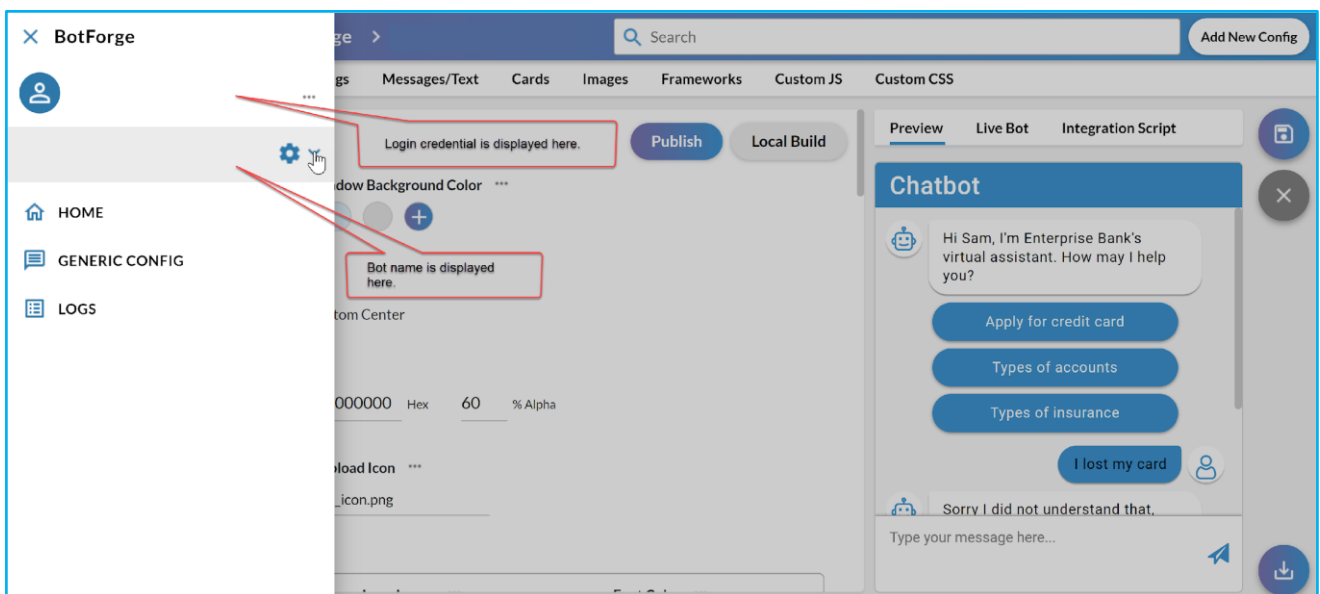






Figure 50: BotForge sidebar menus





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Just below this option, you will see the name of the chatbot the one which you want to customise. From  this option you can also select other chatbots by simply clicking the drop-down.

- Home : This option will take you through to the Home screen, where you can see all the customised buttons. To return to the landing page click on the [] button.
- Generic Config : This is used to access the general configuration tabs. You can use the Local Server IP port to import configurations onto the chatbot server.

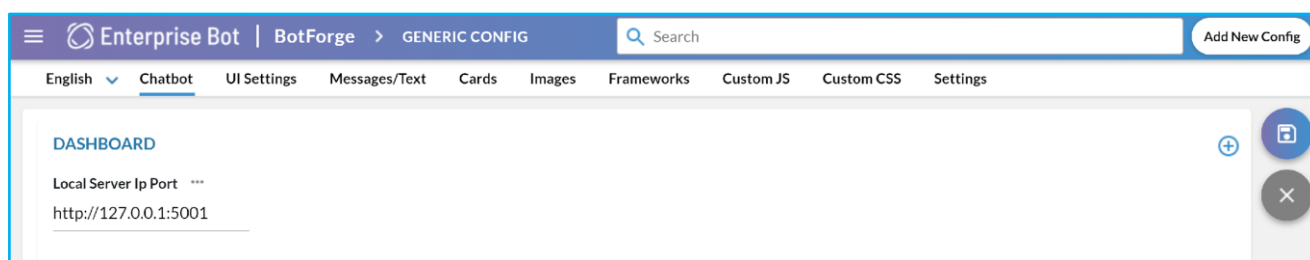



Figure 51: Generic Configuration page

- Logs : This option will take you through the [Config Logs] page. This page will give you the history of all the changes including edits and updates made within the chatbot. This includes the User, Date, Timestamp, Version, Download and Restore option. It's more or less a page like an audit trail. The useful [Restore] option will allow you to the previous version in case of a rollback if needed.

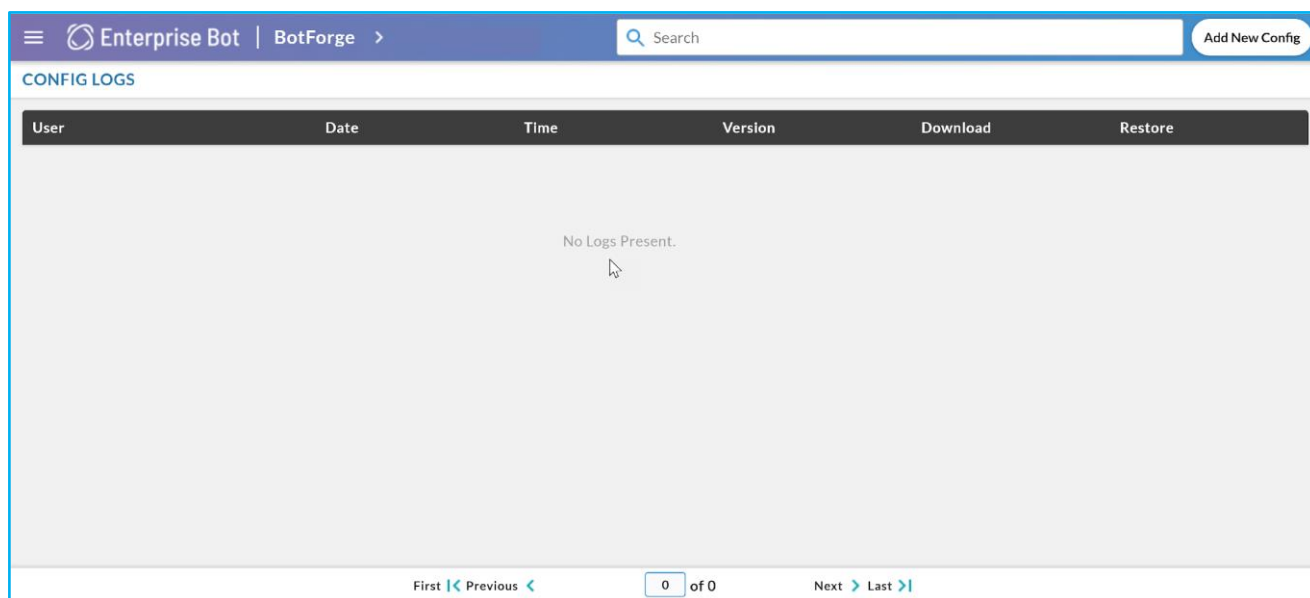


Figure 52: Config Logs page to see the changes

CHATBOT MENU IN BOTFORGE

The first menu on the BotForge page is customising the chatbot. This includes customising the buttons, toggles, and other options in the chatbot. We strongly recommend going through the following steps before you customise your chatbot.





HOW TO CHANGE THE THEME COLOUR IN CHATBOT

In the Theme Colour option, you will be able to see a couple of system-defined colour codes. If you wish to change, click on the [+] button, where you have to enter the colour code from the colour palate. An RGB colour palate is available to choose from and then click on Apply.

The Theme colour changes will be applied to your Chatbot, more precisely the header, chatbot avatar, suggestions, send icon and buttons.

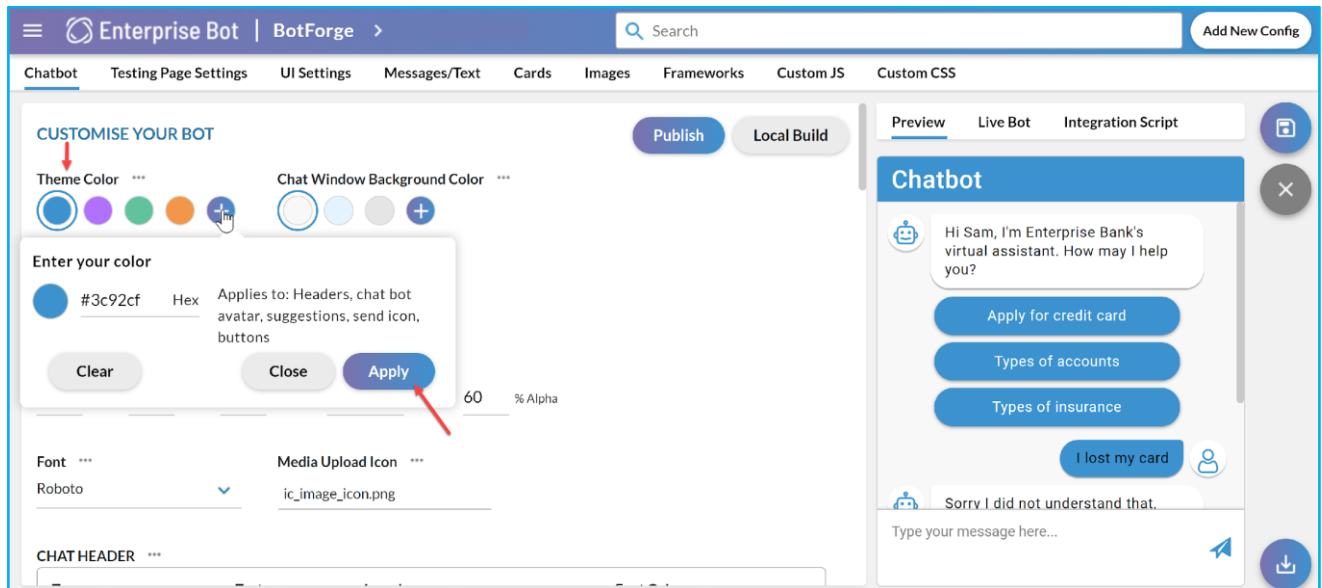


Figure 53: Changing the Theme Colour of the Chatbot

HOW TO CHANGE CHAT WINDOW BACKGROUND COLOUR

You can change the background of the chatbot. By default, a few colour scheme is provided. If you want to change the colour scheme click on the [+] icon. Apart from the default, you can select the colour from the palate.

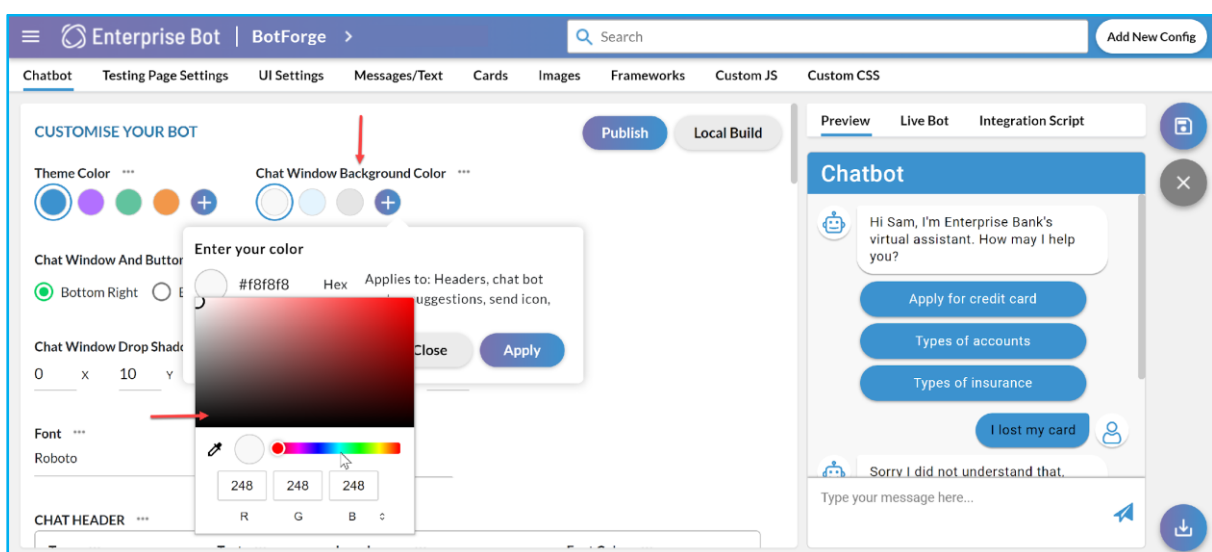


Figure 54: Chat Window Background Colour





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See the below image where the background colour has been changed successfully in the chatbot window.

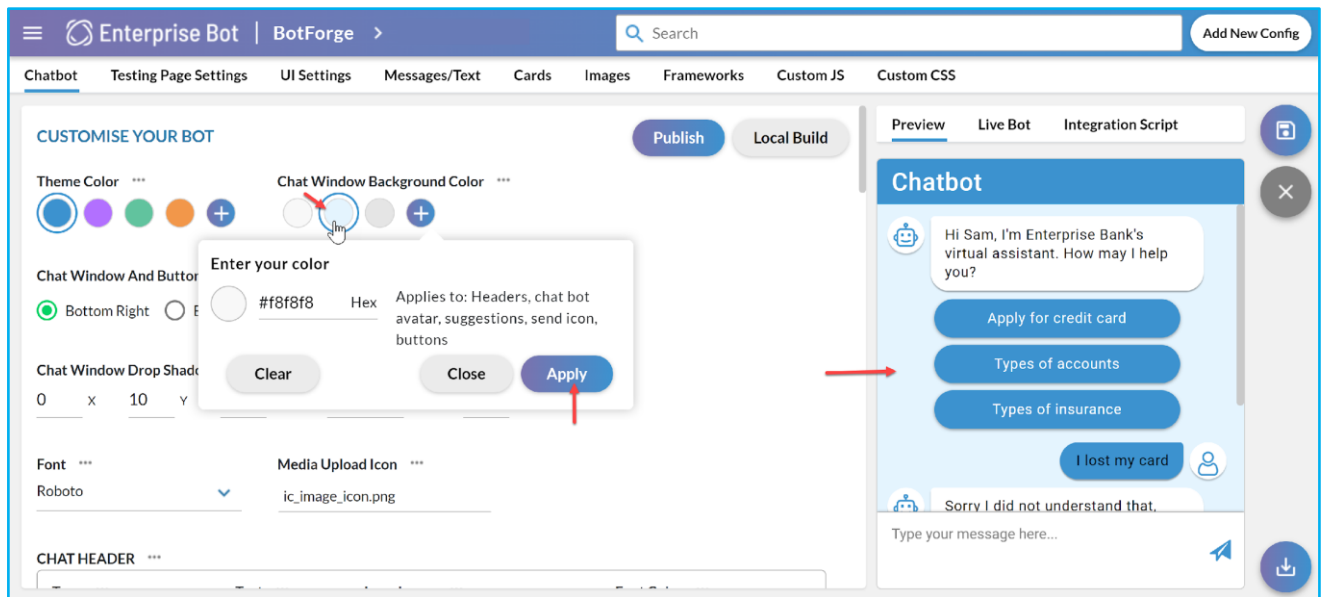


Figure 55: Changed background colour scheme in the Chatbot Window

HOW TO CHANGE CHAT WINDOW AND BUTTON POSITION

BotForge allows you to customise the chat window and the chat button position on your website or landing page. You will have 3 options to place the chat window on the Website or landing page. The 3 options are as follows:

- **Bottom Right:** The chat window will appear on the bottom right-hand corner of the website or landing page.
- **Bottom Left:** The chat window will appear on the bottom left-hand corner of the website or landing page.
- **Bottom Center:** The chat window will appear on the bottom centre of the website or landing page.

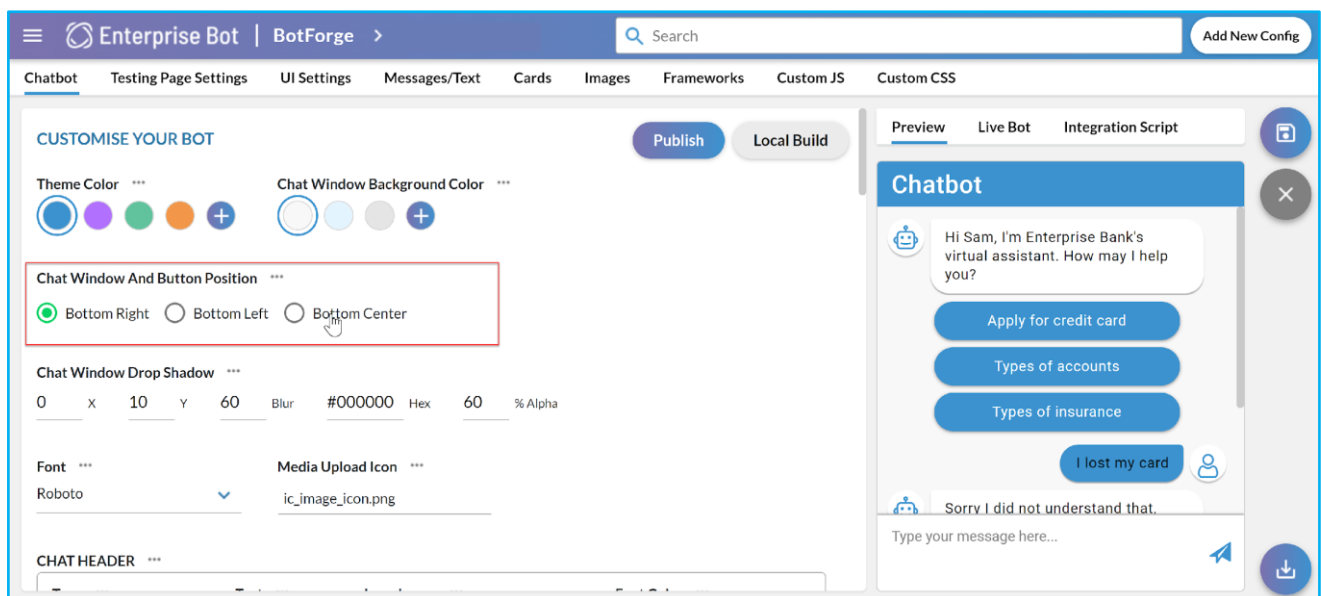


Figure 56: Select the Chat Window position from the available options



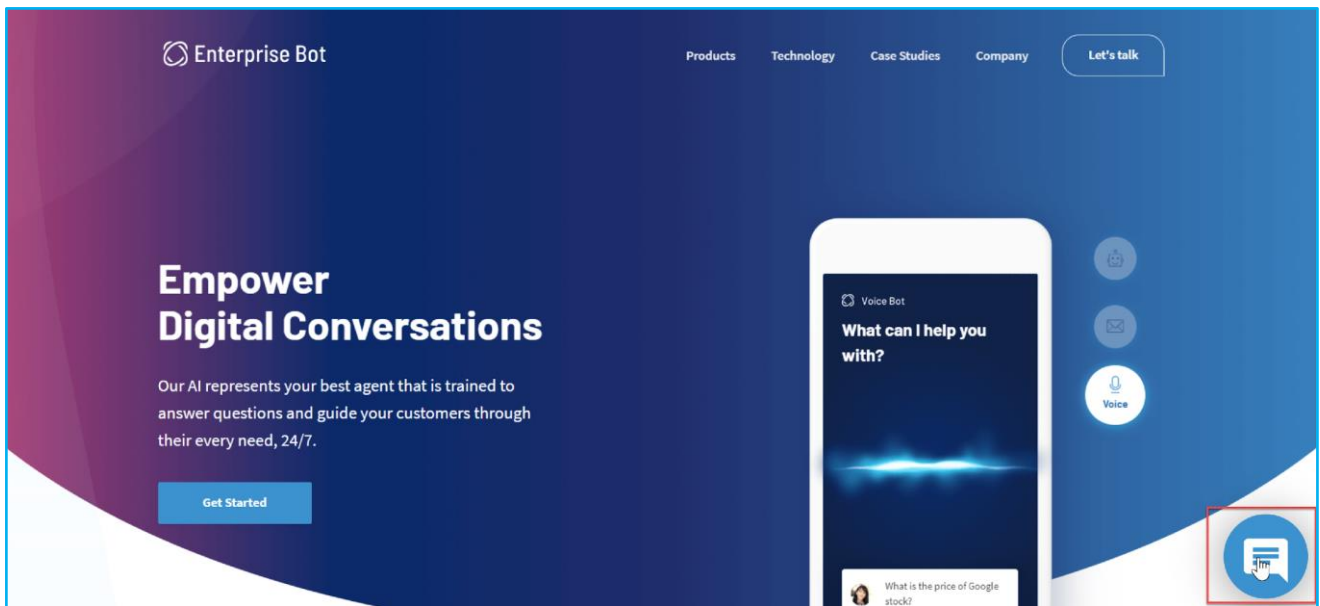


Figure 57: Chat button positioned at the bottom right-hand corner of the website

HOW TO SET THE CHAT WINDOW DROP SHADOW

Under the Chat Window Drop Shadow, you will get the option to adjust and customise drop shadow. The change that you made will be visible around the chat window on the website or landing page.

- **[X]:** This is used to adjust the degree of the drop-shadow which will be seen across the X-axis of the chat window.
- **[Y]:** This is used to adjust the degree of the drop-shadow which will be seen across the Y-axis of the chat window.
- **[Blur]:** This feature will help you adjust the ratio of blur or overall blurriness of the drop-shadow.
- **[Hex]:** It's the designated colour code of the drop-shadow being designed. There are preset colour codes that you can use. If you want to use a new colour code, you can contact us to help you to configure the new colour code schematic.
- **[%Alpha]:** This gives the ratio of transparency that the drop-shadow of the chat window possesses. You can adjust it by increasing or decreasing the percentage.



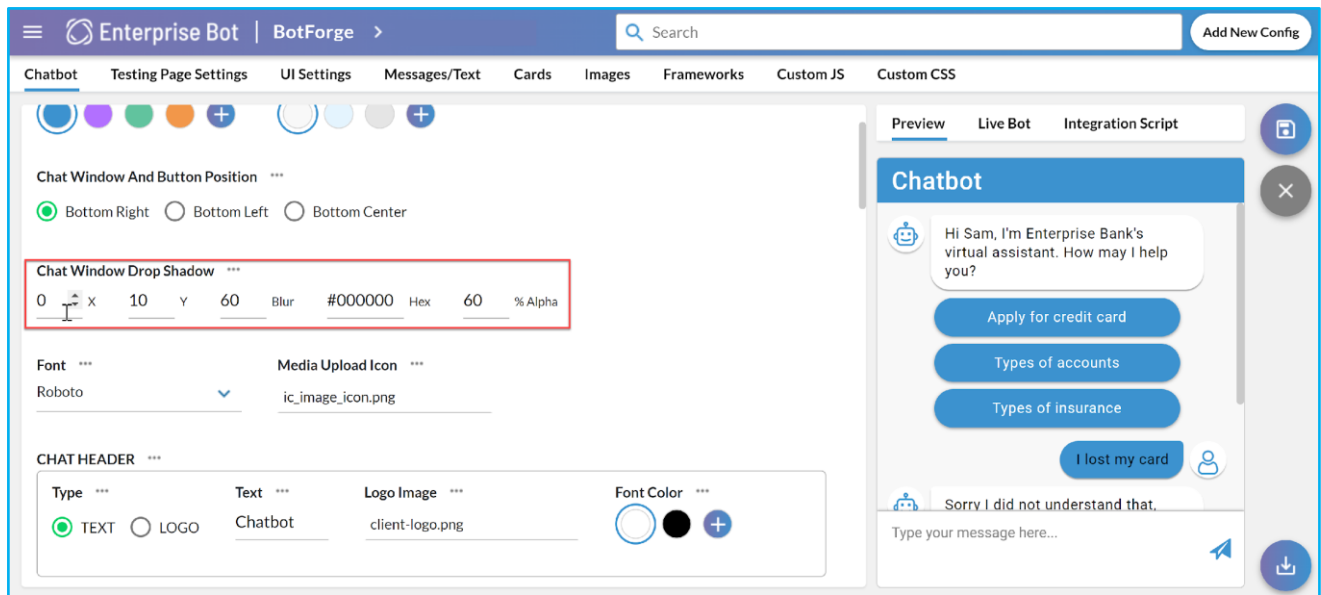


Figure 58: Option to customise the Chat Window Drop Shadow

HOW TO CHANGE THE FONTS AND UPLOAD MEDIA ICON

You can change the fonts of the chatbot from the Botforge section.

You can share a file with an agent either as an attachment or drag and drop the file in the chatbox. While using the drag and drop option an icon appears in the background of the Chat window. That is known as the **Media Icon**. If you wish to change the media icon use the Media Upload Icon option.

Under the fonts drop-down, you will get the fonts that are already available within your bot. You just need to select the font in case if you want to change it.



If the font is not available within the list, please contact us. Media Icon appears only when you share a file or image with the agent by using the drag and drop method.

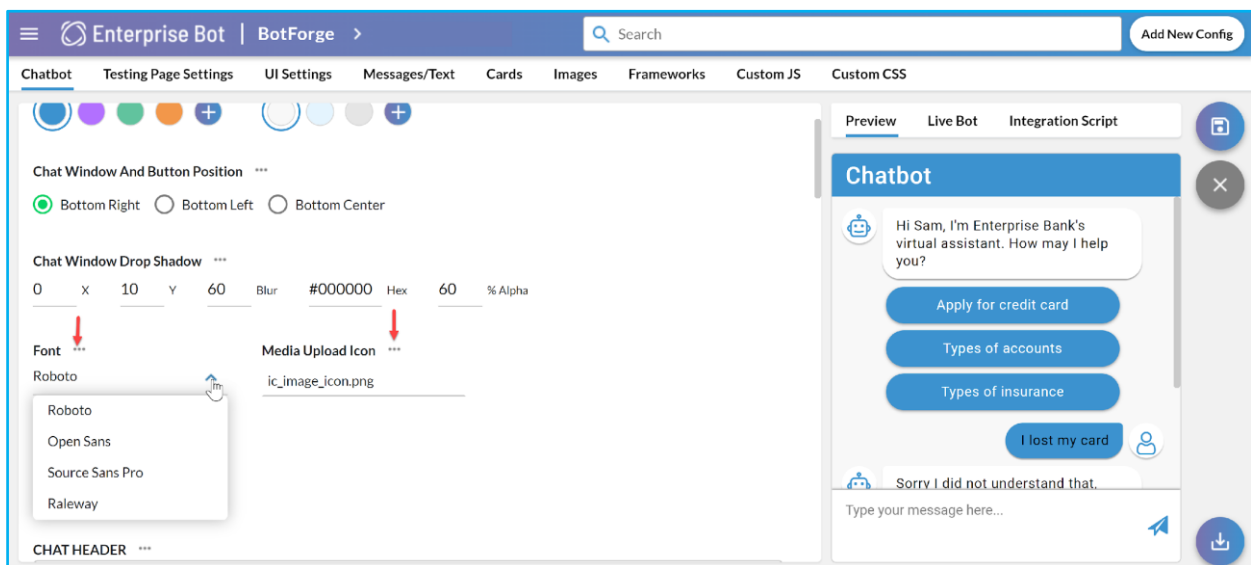


Figure 59: Font selection and Option to upload a new media icon





HOW TO CUSTOMISE THE CHAT HEADER

You can always customise the Chat Header from the [Chat Header] section. This includes the following fields.

- **Type:** Under this option, you will have two categories as Text and Logo. Either you can choose Text or Logo which will be displayed in the Chatbot header.
- **Text:** If you select [Text], then you need to enter the text which you want to be displayed in the header. For example, in the following figure, we have selected Text and the text which we have entered is displayed on the chatbot header.

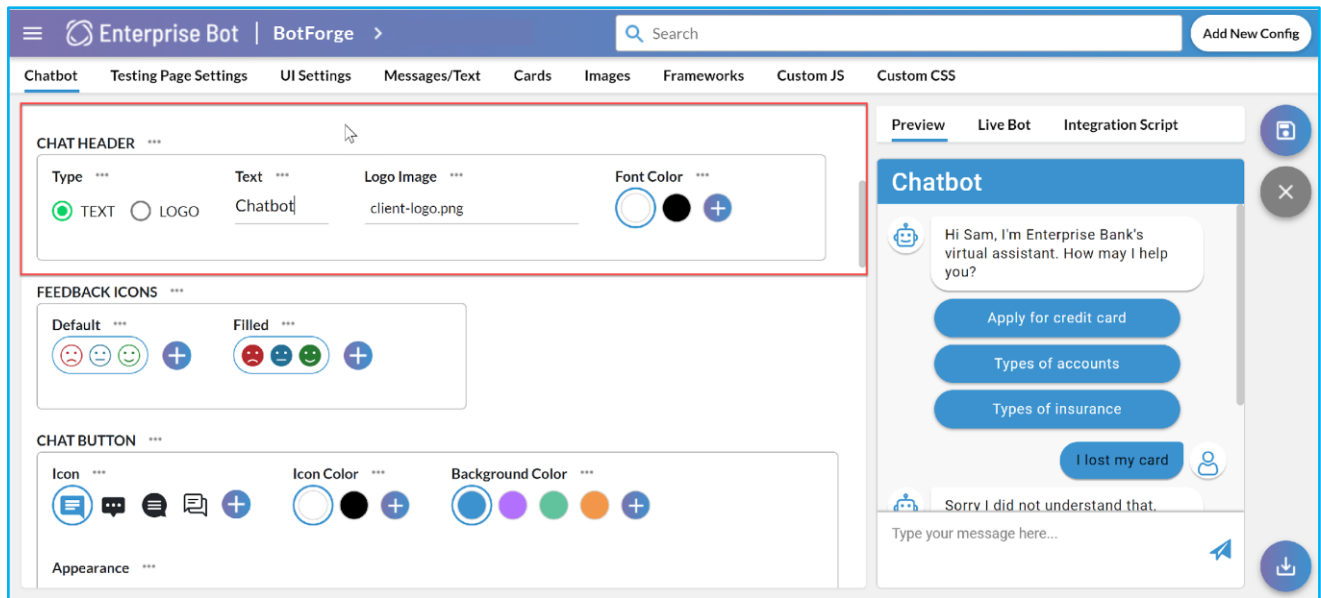


Figure 60: The text option is selected as the header.

- **Logo Image:** If you select the logo, then you just need to specify the path of the logo which will be uploaded as a header. In the following figure, the Logo is selected and the same is uploaded as header.
- **Font Colour:** You need to choose the font colour of the text of the chatbot header.

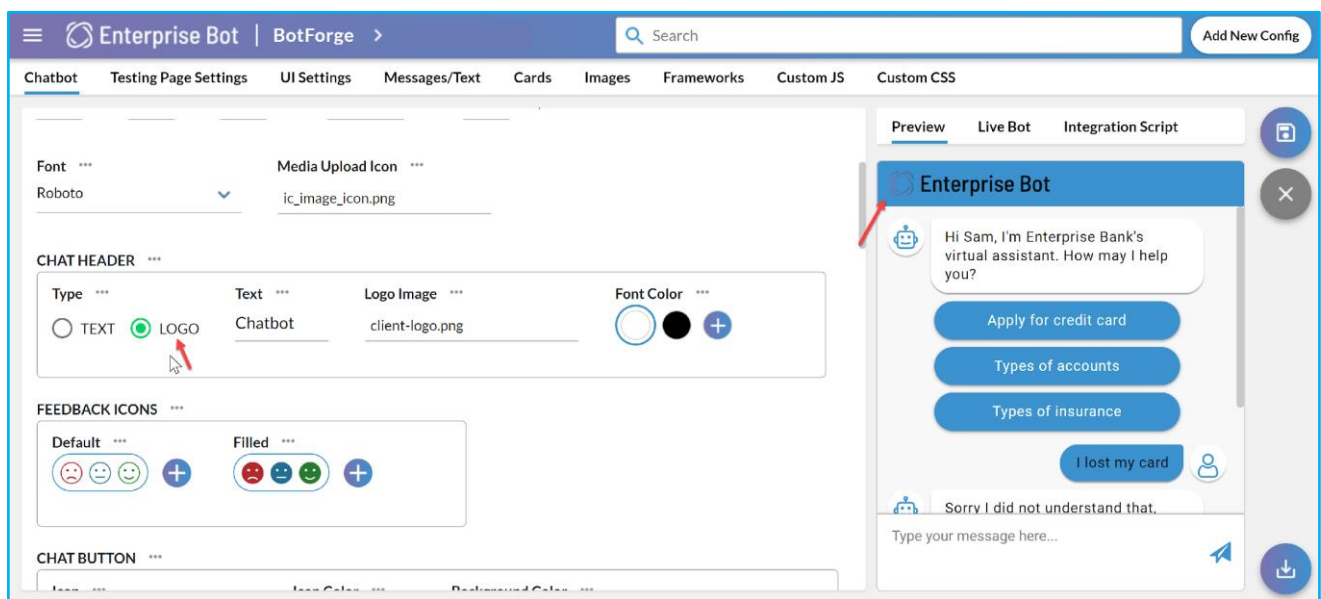


Figure 61: The logo option is selected as the header.





HOW TO CUSTOMISE THE FEEDBACK ICONS

After every interaction, the chatbot provides feedback to the user with an option to record their feedback via these icons which are commonly known as emoticons. In general, a smiley face represents a good experience and a sad face depicts a poor experience.

Here, you can select any of the [Feedback Icons] which are predefined. If you want to customise the icon click on the [+]
symbol to your own customise images and design. Filled icon refers to the icons when you click the default icon in the chatbot window. Similarly, you can customise the Filled Icons.

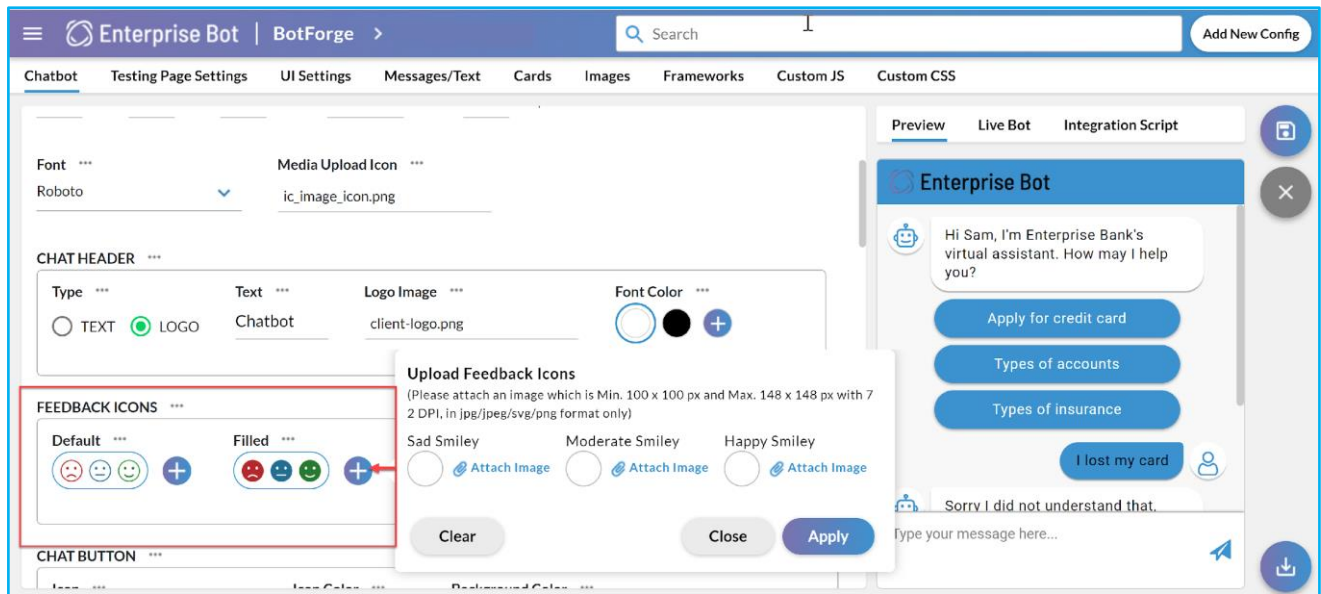


Figure 62: Customisation of the Feedback Icons.

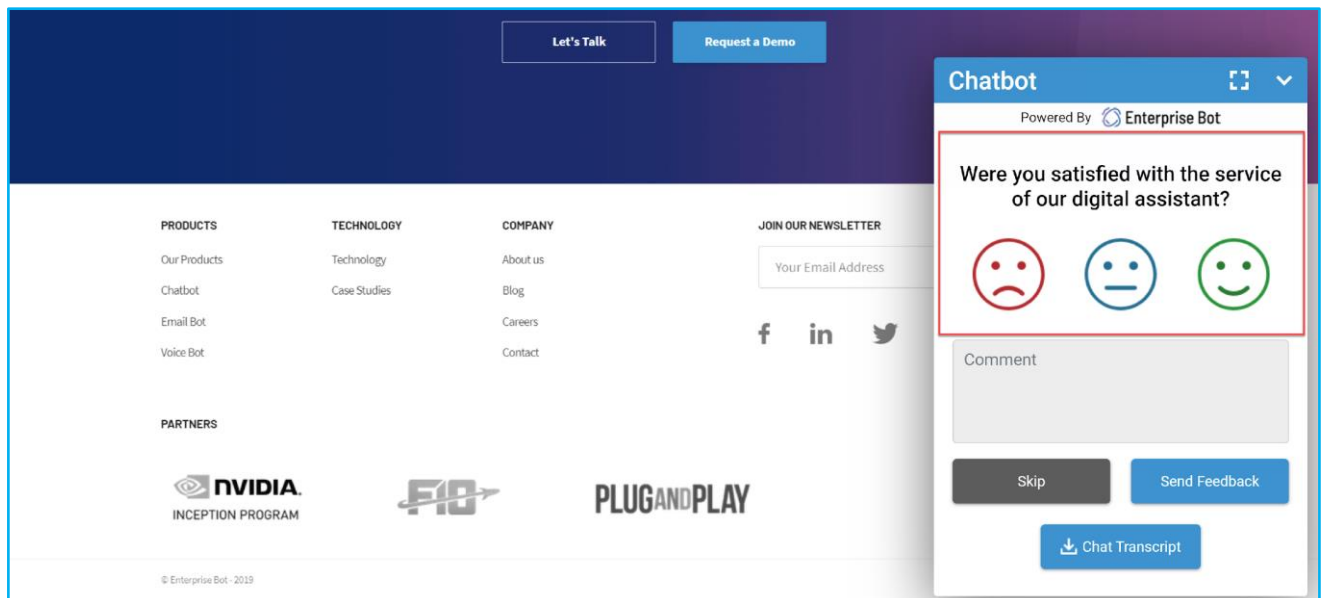


Figure 63: Feedback Icons on the Chatbot window on the Website/ Landing page.

HOW TO CUSTOMISE THE CHAT BUTTON





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You can customise the Chat button on the website/ landing page from this section. This section allows you to customise how the chat button will look on the website. This section is mainly divided into 2 sections. The first section allows you to customise the look and feel of the Chat Icon and the other section allows you to customise the appearance and the drop shadow of the chat icon.

- **Icon:** This option allows you to choose how the chat icon will look on the website or the landing page. There are a couple of system-defined icons available. If you want to create a new icon you need to click on the **[+]** option. You need to attach or upload the new icon. The minimum size of the image should be 36px * 36 px and the maximum allowable size is 72px * 72 px with 72 DPI. We support .jpg, .jpeg, .svg or .png. After attaching the image you need to click on the upload button. If you want to delete the image you have uploaded simply click on the [Trash] icon.
- **Icon Colour:** This option allows you to choose the colour of the chat icon which will be shown on the website or the landing page. Apart from the two systems defined colour, if you want to change click on the **[+]** icon. From the colour palette, you need to choose the icon colour and click on **[Apply]**.
- **Background Colour:** This option allows you to customise the background colour of the chat icon which will be shown on the website or the landing page. Apart from 4 system-defined background colours, if you want to customise click on the **[+]** button. Simply choose the background colour from the colour palette and click on [Apply].
- **Appearance:** To show the chat button on your website/landing page the **[Show]** radio button must be on. In case if you don't want to display the chat button for any reason click on **[Hide]**.
- **Drop Shadow:** This set of options will help you to customise the drop-shadow which is shown around the chat button on the website/ landing page.
 - **X:** This is used to adjust the degree of the drop shadow which will be shown across the X-axis of the chat button.
 - **Y:** This is used to adjust the degree of the drop shadow which will be shown across the Y-axis of the chat button.
 - **Blur:** This option helps you adjust the ratio of the blur or overall blurriness of the drop shadow.
 - **Hex:** It is the designated colour code of the drop shadow. You can use the system-defined colour codes. If you want to set a colour code that is not in the list of colour codes, please contact the EB support team.
 - **% Alpha:** This gives the ratio of transparency of the drop-shadow window of the chat window. You can increase or decrease the percentage by using the spinning button.

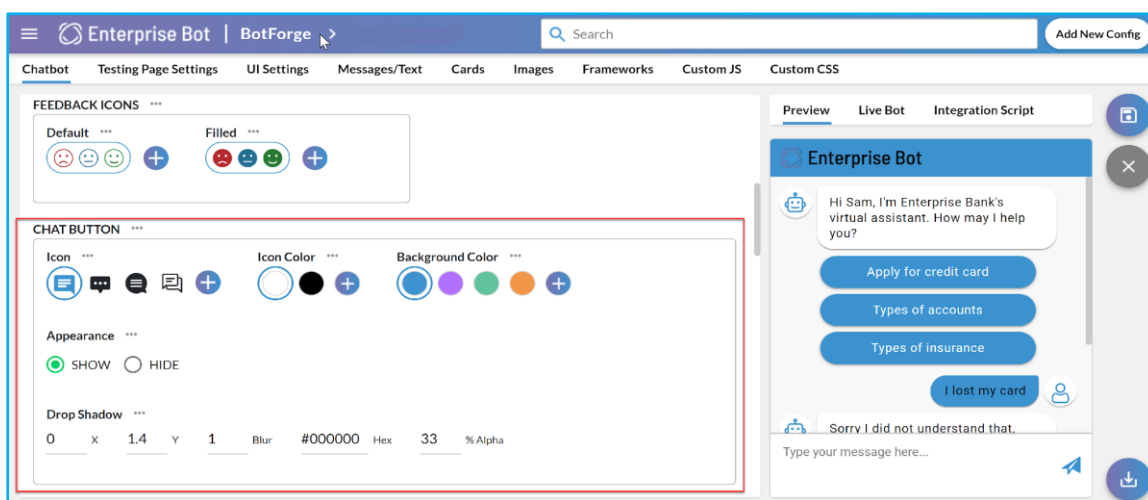


Figure 64: Customise your chat button from the above section





HOW TO CUSTOMISE THE CHATBOT MESSAGE

This option allows you to edit and customise the text that your bot uses to communicate with the user. This section is mainly divided into 3 sections. From the first section, you can customise the Avatar. From the second section, you can select the font colour and font size and the third one is about the drop-shadow.

- **Avatar:** This is a bot icon. By default, we provide 4 Avatar icons. If you wish to use a new customised icon click on the [+] and you need to attach and upload the icon. The minimum size of the icon should be 36px X 36 px and the maximum should be 72px X 72 px. We support .jpg, .jpeg, .svg and .png file types.
- **Icon Colour:** This is the Avatar icon colour. Apart from the default options, you can customise it by simply clicking on the [+] icon. You need to choose the colour from the colour palette.
- **Background Colour:** Select the background colour. By default, you will find 2 systems defined colours. If you wish to change then click on the [+] icon. For more colours, select the proper background colour from the colour palate.
- **Font Colour:** You can change the font colour from this option. By default, black and white is system reserved. If you want to change the font colour using the [+] and select the colour from the palate.
- **Font Size:** You can select the font size from here.
- **Drop Shadow:** The Drop-Shadow section gives the user the ability to edit and adjust the drop-shadow of the chatbot message, which you can see on the website/landing page.
 - **X:** This is used to adjust the degree of drop-shadow which will be seen across the X-axis of the chat message.
 - **Y:** This is used to adjust the degree of the drop-shadow which will be seen across the Y-axis of the chat message.
 - **Blur:** This helps you to adjust the ratio of blur or blurriness of the drop-shadow.
 - **Hex:** This is the designated colour code of the drop-shadow being designed. You can use the predefined colour code. In case, if you want to use a new colour code that is not available within the system please contact us.
 - **%Alpha:** This refers to the ratio of transparency that the drop-shadow of the chat message will possess. You can increase or decrease it by using the spinning button.

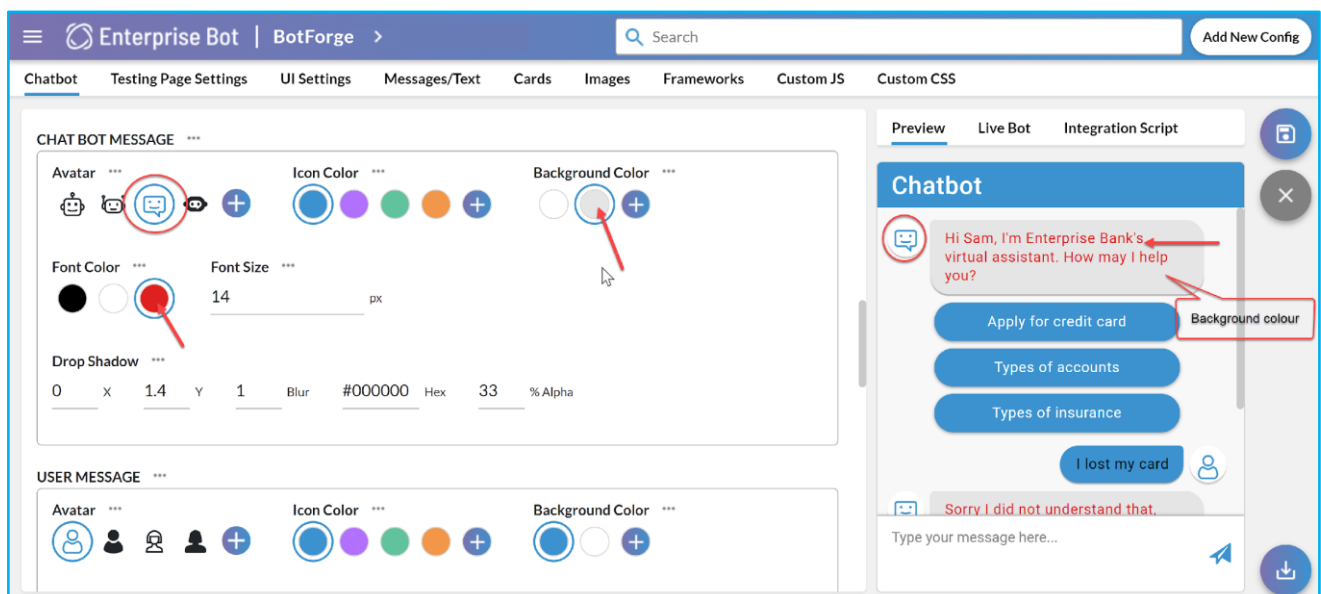


Figure 65: Customise your Chatbot messages





HOW TO CUSTOMISE USER MESSAGE

In this section, you can customise the User Message in terms of the Avatar, Icon, Fonts, Background etc. The section is mainly divided into 3 sections. From the first section, you can customise the Avatar. From the second section, you can select the font colour and font size and the third one is about the drop-shadow.

- **Avatar:** This is the icon that comes along with the user's message within the Chatbot. By default, we provide 4 Avatar icons. If you wish to use a new customised icon click on the [+] and you need to attach and upload the icon. The minimum size of the icon should be 36px X 36 px and the maximum should be 72px X 72 px. We support .jpg, .jpeg, .svg and .png file types.
- **Icon Colour:** This is the Avatar icon colour. Apart from the default options, you can customise it by simply clicking on the [+] icon. You need to choose the colour from the colour palette.
- **Background Colour:** Select the background colour. By default, you will find 2 systems defined colours. If you wish to change then click on the [+] icon. For more colours, select the proper background colour from the colour palate.
- **Font Colour:** You can change the font colour from this option. By default, black and white are system reserved. If you want to change the font colour using the [+] and select the colour from the palate.
- **Font Size:** You can select the font size from here.
- **Drop Shadow:** The Drop-Shadow section gives the user the ability to edit and adjust the drop-shadow of the chatbot message, which you can see on the website/landing page.
 - **X:** This is used to adjust the degree of drop-shadow which will be seen across the X-axis of the chat message.
 - **Y:** This is used to adjust the degree of the drop-shadow which will be seen across the Y-axis of the chat message.
 - **Blur:** This helps you to adjust the ratio of blur or blurriness of the drop-shadow.
 - **Hex:** This is the designated colour code of the drop-shadow being designed. You can use the predefined colour code. In case, if you want to use a new colour code that is not available within the system please contact us.
 - **%Alpha:** This refers to the ratio of transparency that the drop-shadow of the chat message will possess. You can increase or decrease it by using the spinning button.



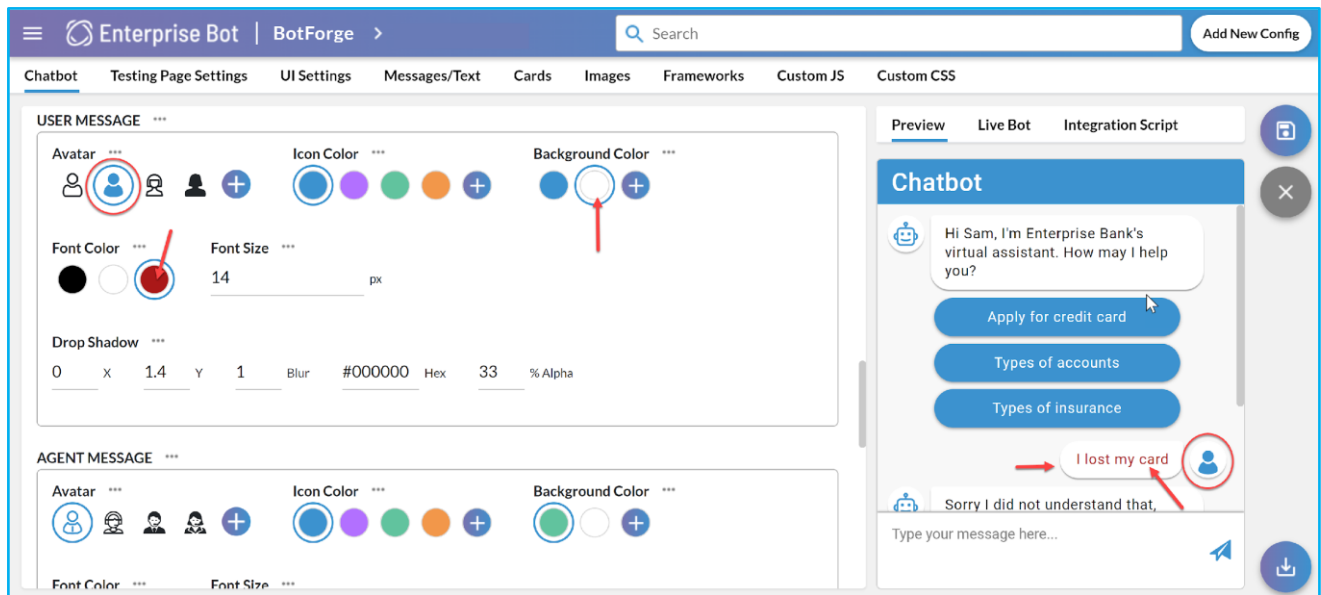


Figure 66: Customisation of the User Message (Customised Avatar, Fonts, Background)

HOW TO CUSTOMISE THE AGENT MESSAGE

In this section, you can customise the Agent Message in terms of the Avatar, Icon, Fonts, Background etc. This is applicable when an agent joins a conversation with the user in the chat. The section is mainly divided into 3 sections. From the first section, you can customise the Avatar. From the second section, you can select the font colour and font size and the third one is about the drop-shadow.

- **Avatar:** This is the icon that comes along with the agent's message within the Chatbot. By default, we provide 4 Avatar icons. If you wish to use a new customised icon click on the [+] and you need to attach and upload the icon. The minimum size of the icon should be 36px X 36 px and the maximum should be 72px X 72 px. We support .jpg, .jpeg, .svg and .png file types.
- **Icon Colour:** This is the Avatar icon colour. Apart from the default options, you can customise it by simply clicking on the [+] icon. You need to choose the colour from the colour palette.
- **Background Colour:** Select the background colour. By default, you will find 2 systems defined colours. If you wish to change then click on the [+] icon. For more colours, select the proper background colour from the colour palate.
- **Font Colour:** You can change the font colour from this option. By default, black and white are system reserved. If you want to change the font colour using the [+] and select the colour from the palate.
- **Font Size:** You can select the font size from here.
- **Drop Shadow:** The Drop-Shadow section gives you the ability to edit and adjust the drop-shadow of the chatbot message, which you can see on the website/landing page.
 - **X:** This is used to adjust the degree of drop-shadow which will be seen across the X-axis of the chat message.
 - **Y:** This is used to adjust the degree of the drop-shadow which will be seen across the Y-axis of the chat message.
 - **Blur:** This helps you to adjust the ratio of blur or blurriness of the drop-shadow.





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- **Hex:** This is the designated colour code of the drop-shadow being designed. You can use the predefined colour code. In case, if you want to use a new colour code that is not available within the system please contact us.
- **%Alpha:** This refers to the ratio of transparency that the drop-shadow of the chat message will possess. You can increase or decrease it by using the spinning button.

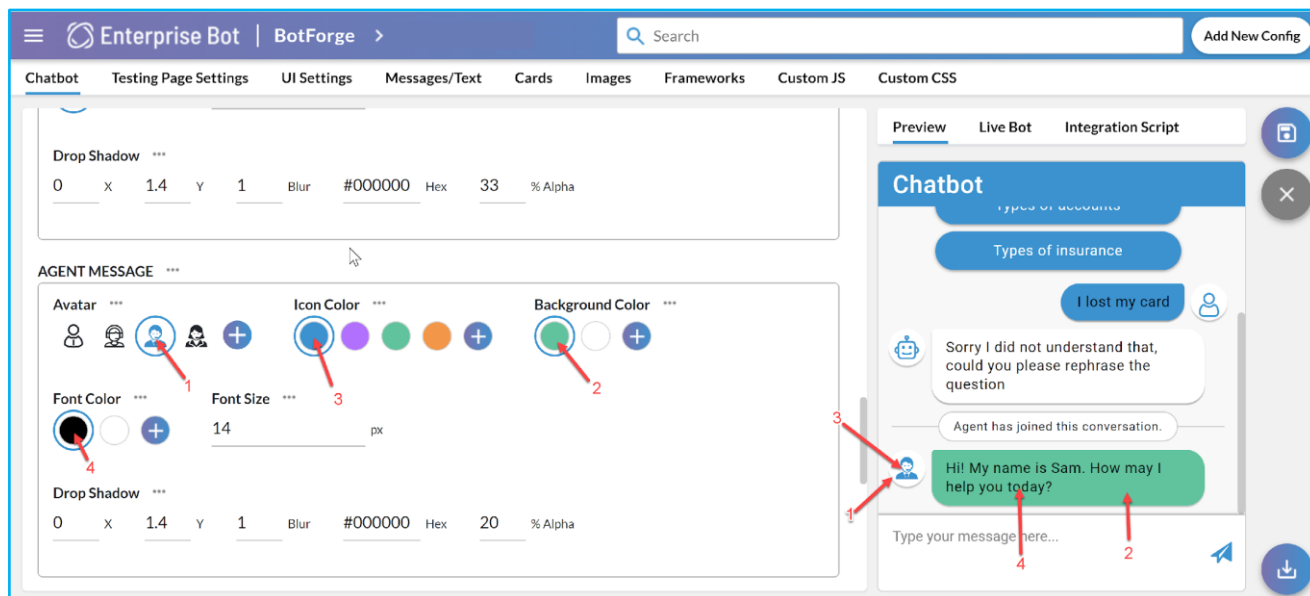


Figure 67: Customisation of the Agent Message (Customised Avatar, Fonts, Background)



Customised Agent messages are only visible when the user is speaking to an Agent.

HOW TO CUSTOMISE THE SUGGESTIONS IN THE CHAT

You can customise the suggestion on the chat window which will appear on the website/ landing page. This section is mainly divided into 2 sections. The top section is mainly for the look and feel of the suggestions option that you have provided. The other section allows you to edit the drop-shadow of the appearance of the suggestion bars.

- **Background Colour:** The background colour of the suggestion band comes with 2 system-defined colours. However, if you want to change the background click on the [+] icon for the colour palate. Select the appropriate colour for customisation.
- **Font Colour:** You can customise the font colour of the texts of the suggestions. By default, you will get two colours. To customise the font colour click on the [+] icon for the colour palate.
- **Drop Shadow:** The Drop-Shadow section gives you the ability to edit and adjust the drop-shadow of the chatbot message, which you can see on the website/landing page.
 - **X:** This is used to adjust the degree of drop-shadow which will be seen across the X-axis of the chat message.
 - **Y:** This is used to adjust the degree of the drop-shadow which will be seen across the Y-axis of the chat message.
 - **Blur:** This helps you to adjust the ratio of blur or blurriness of the drop-shadow.
 - **Hex:** This is the designated colour code of the drop-shadow being designed. You can use the predefined colour code. In case, if you want to use a new colour code that is not available within the system please contact us.





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- **%Alpha:** This refers to the ratio of transparency that the drop-shadow of the chat message will possess. You can increase or decrease it by using the spinning button.

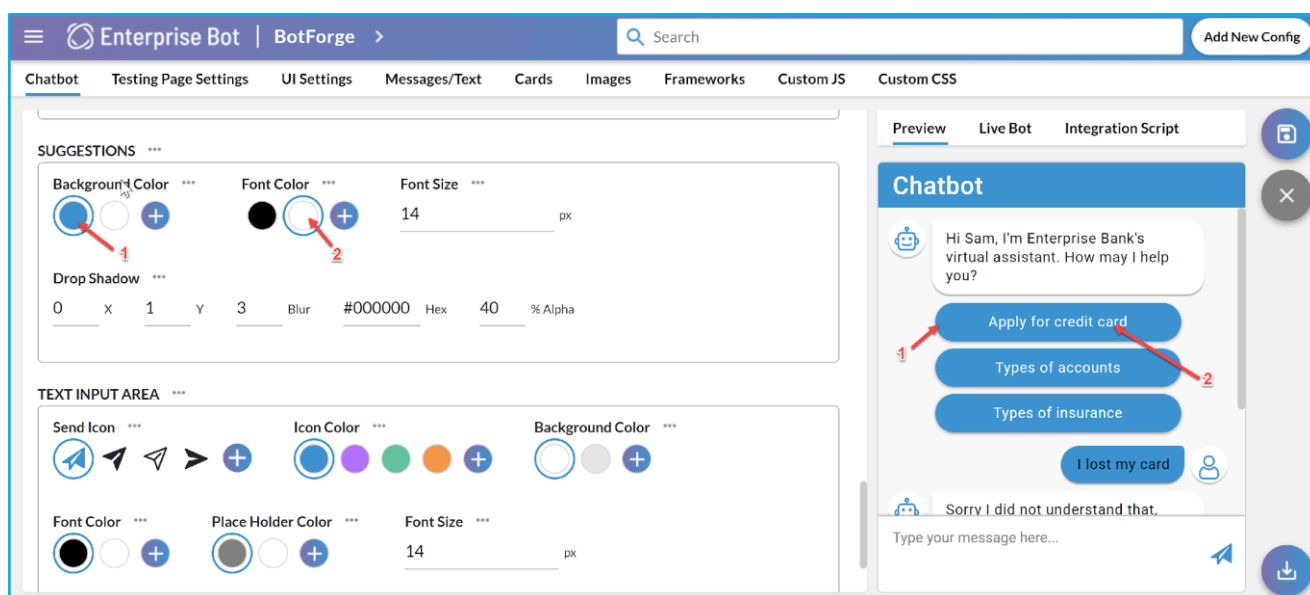


Figure 68: Customisation of the Suggestion buttons in the Chatbot (Background and Font Colour)

HOW TO CUSTOMISE THE TEXT INPUT IN CHATBOT

The Text Input Area allows you to customise the text input field in the chatbot. The first section is about customizing the Send Icon in terms of look and feel. To customise the Send Icon you will have the following option.

- **Send Icon:** 4 system defined Send Icons will be available. If you want to use a different icon you need to attach that image and upload it. The minimum size of the icon should be 36px X 36px and the maximum should be 72px X 72px with 72 dpi (dots per inch). We support .jpg, .jpeg, .png and .svg file format only for the icon. You can see the Preview of the change in the chatbot on the right-hand side.
- **Icon Colour:** 4 system defined icon colours will be available. To use a different colour code click on the [+] button and choose the colour from the palate that you want to use.
- **Background Colour:** 2 system defined background colours will be available. If you want to use a different background click on the [+] icon and select the background colour from the colour palate.



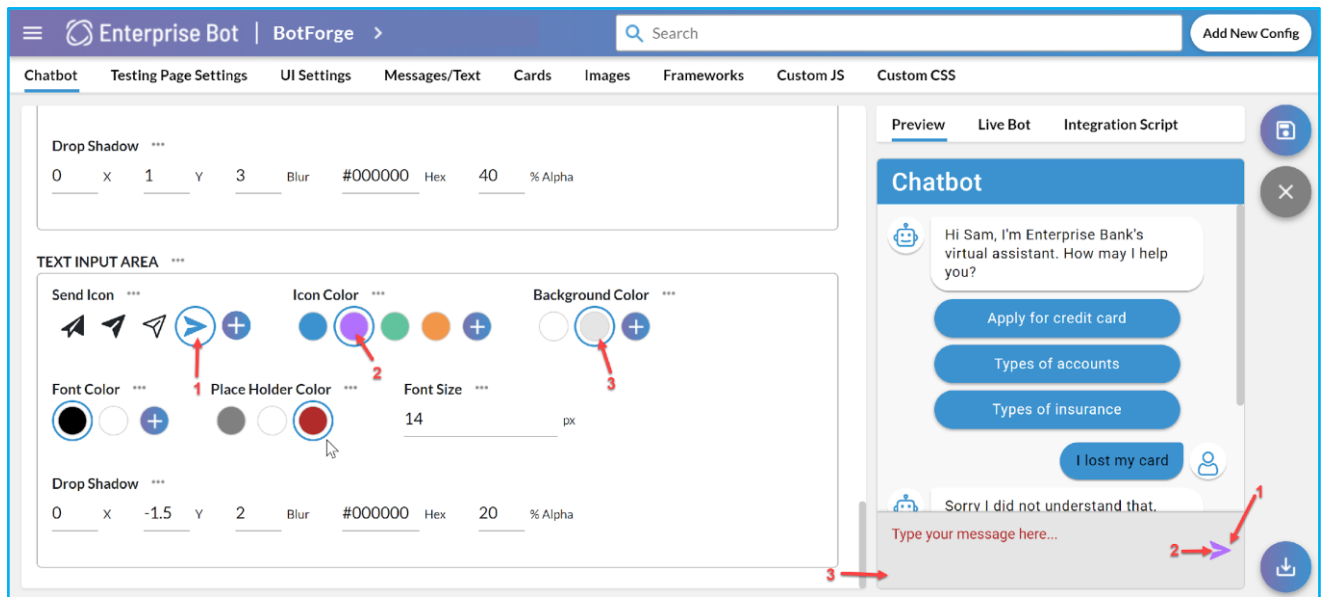



Figure 69: Customisation of the Send Icon (Send Icon, Icon colour and the background colour)

The other options in this section are about the Font colour, Placeholder colour and Font Size.

- **Font Colour:** You can customise the font colour. By default, the system will provide you with two colours. If you want to customise the font colour click on the [+] button, a colour palette will appear and you just need to choose the colour you want to use.

 Before you choose the colour code for the fonts for the text ensure the background colour for better visual impact.

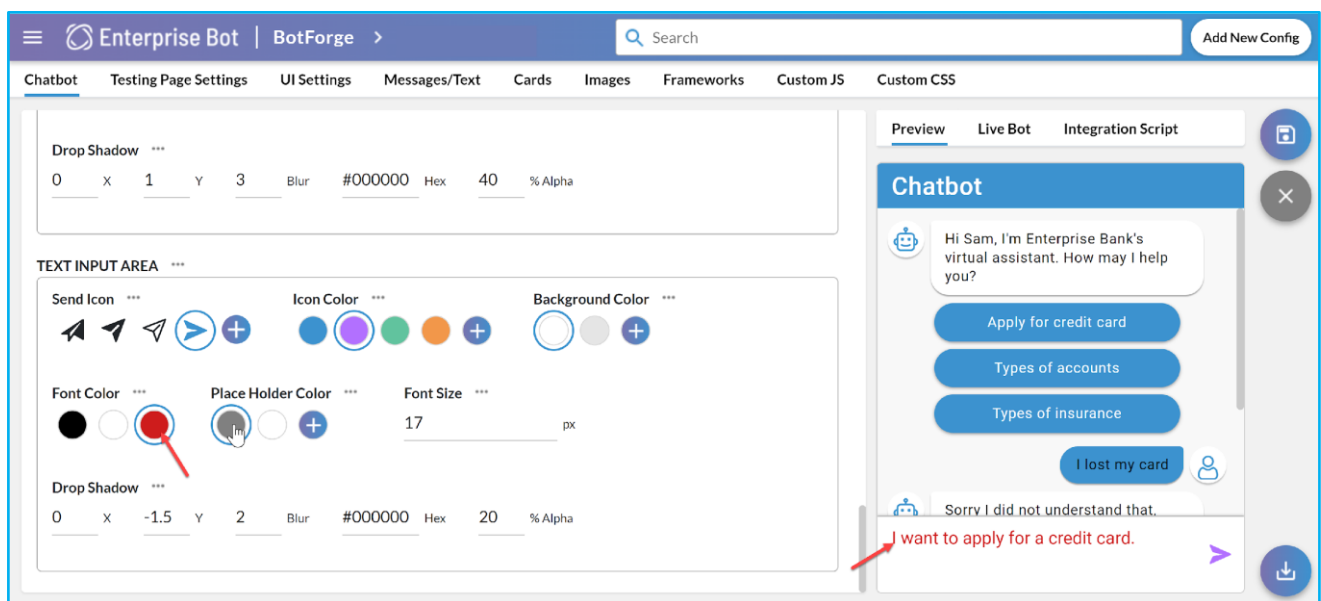


Figure 70: Customisation of the Font colour.





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- **Place Holder Colour:** This option helps you to customise the colour of the text input area's placeholder, which will be visible on the website/ landing page. Placeholder colour refers to the colour where you will enter the text. You can customise the placeholder colour. We advise you to set the placeholder colour before you select the font colour or the background colour.

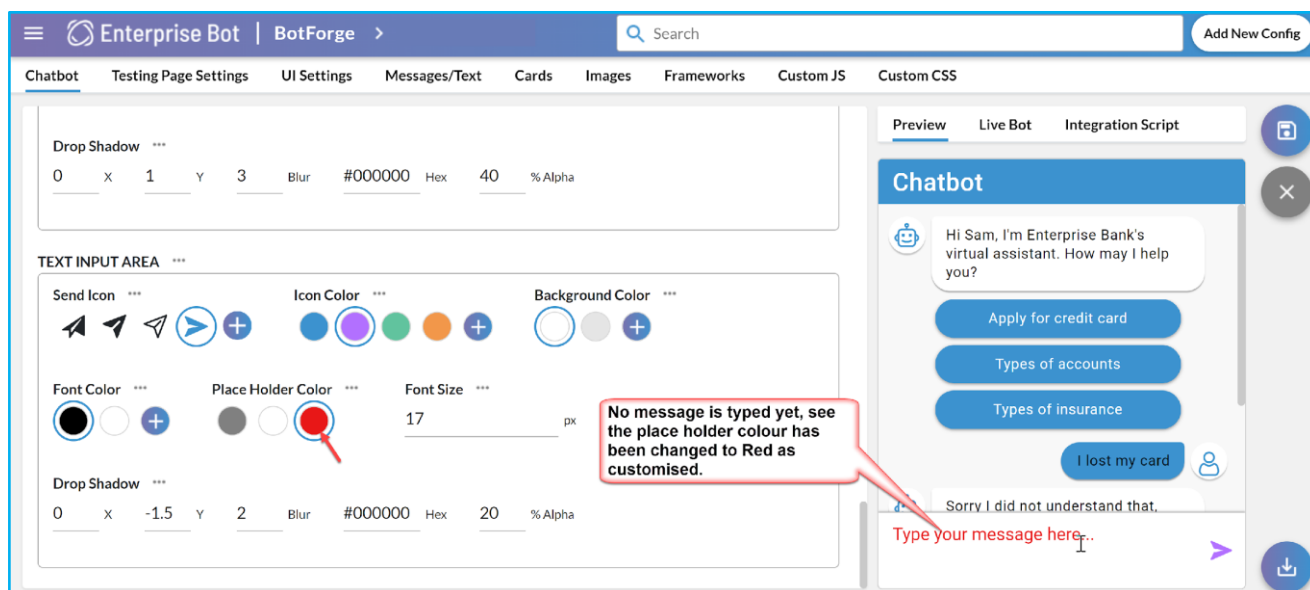




Figure 71: Customisation of the placeholder colour

- **Font Size:** By default, the font size of the text is set to 14 px. You can change it according to your requirement from the drop-down.
- **Drop Shadow:** The Drop-Shadow section gives you the ability to edit and adjust the drop-shadow of the chatbot message, which you can see on the website/landing page.
 - **X:** This is used to adjust the degree of drop-shadow which will be seen across the X-axis of the chat message.
 - **Y:** This is used to adjust the degree of the drop-shadow which will be seen across the Y-axis of the chat message.
 - **Blur:** This helps you to adjust the ratio of blur or blurriness of the drop-shadow.
 - **Hex:** This is the designated colour code of the drop-shadow being designed. You can use the predefined colour code. In case, if you want to use a new colour code that is not available within the system please contact us.
 - **%Alpha:** This refers to the ratio of transparency that the drop-shadow of the chat message will possess. You can increase or decrease it by using the spinning button.

 You must click on the  button after making changes in any of the sections to reflect those in the chatbot.

TESTING PAGE SETTINGS

On the top of the Bot Forge page, the second menu is the **Testing Page Settings**. This section has a couple of sets of options that you can use to customise and get a feel of the Chatbot on the webpage. In nutshell, this option gives you visibility and clarity in designing the webpage for testing the chatbot.





ABOUT THE PAGE TITLE

You can customise the Testing page title and can also upload an image. Here you can set the title of the webpage tab which appears on the top of the browser window. This helps you in terms of visual improvement based on the design of the website for testing the chatbot.

- **Page Title:** You can set the title of the webpage tab, which appears on the top of the browser window.
- **Favicon Image:** You can set the [Favicon] image. It is visible next to the page title on the top of the browser window.

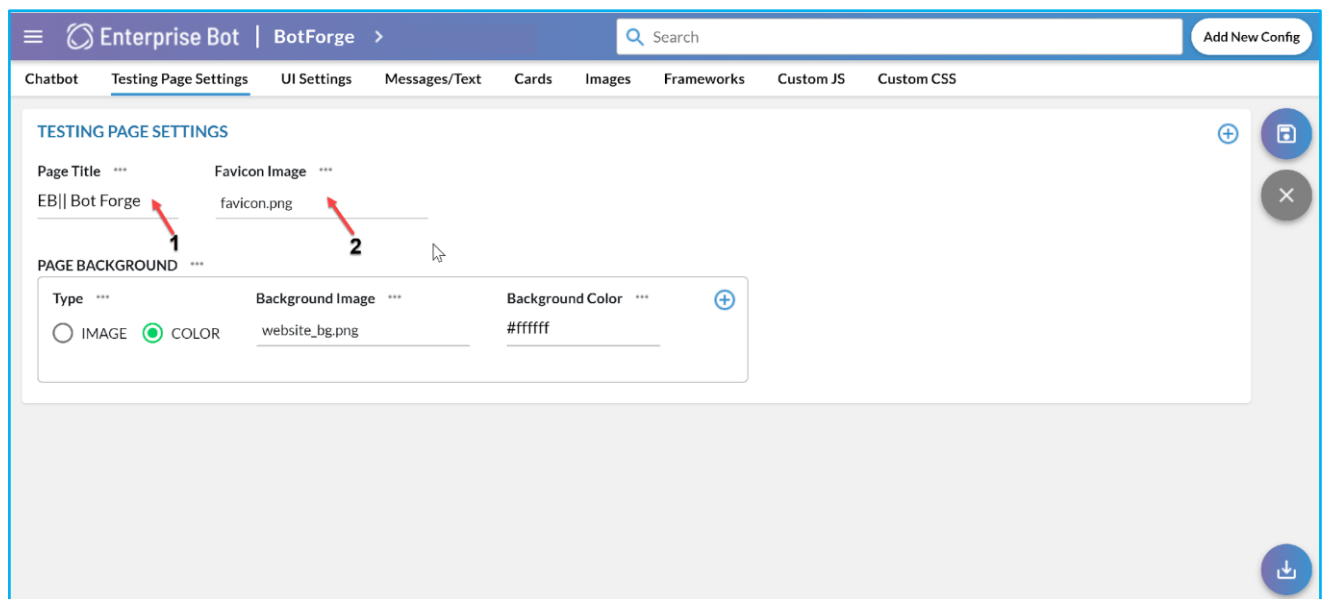


Figure 72: Customising the Page Title and Favicon Image.

You can also customise the page background to display an image or the colour on the background of the webpage of the testing page. Under the Page Background section, you will get the following options to customise.

- **Page Background:** You can choose to display an image or a colour on the background of the webpage of the testing page.
- **Background Image:** If you select a Background Image option, then you need to upload a background image.
- **Background Colour:** If you have selected the Background colour option, then you need to select the background colour code.



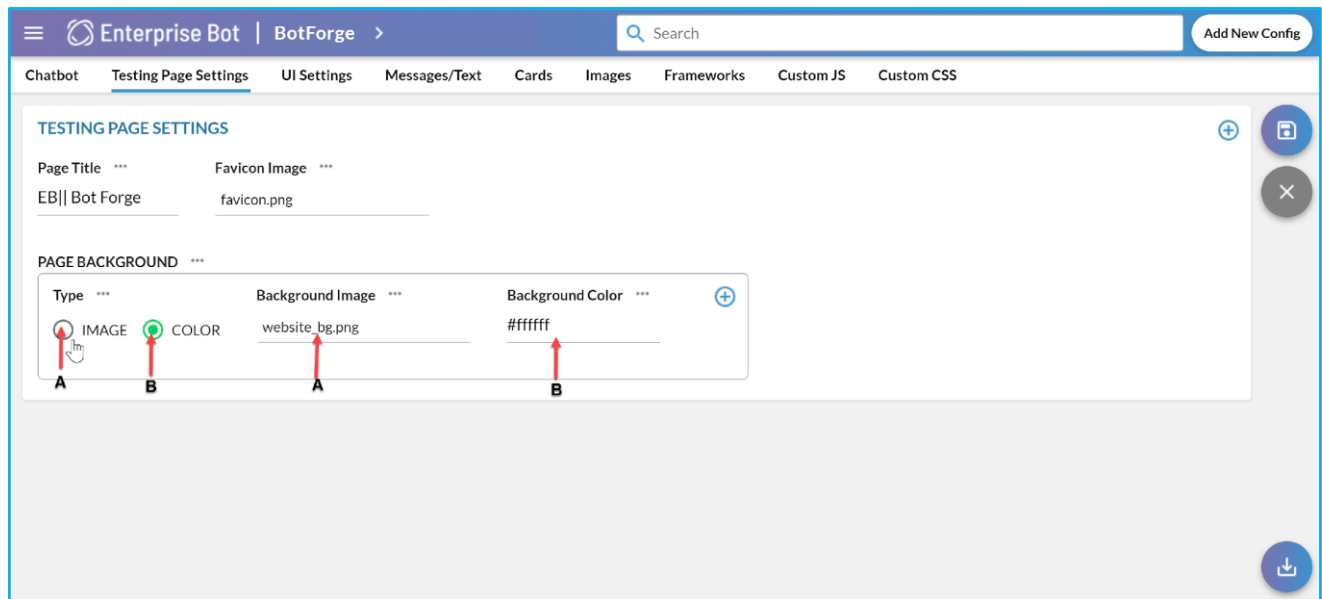


Figure 73: Customisation of Page Background

After making the changes on the Testing Page Setting you must click on save. You will be getting an information message confirming the changes that you have made are saved.

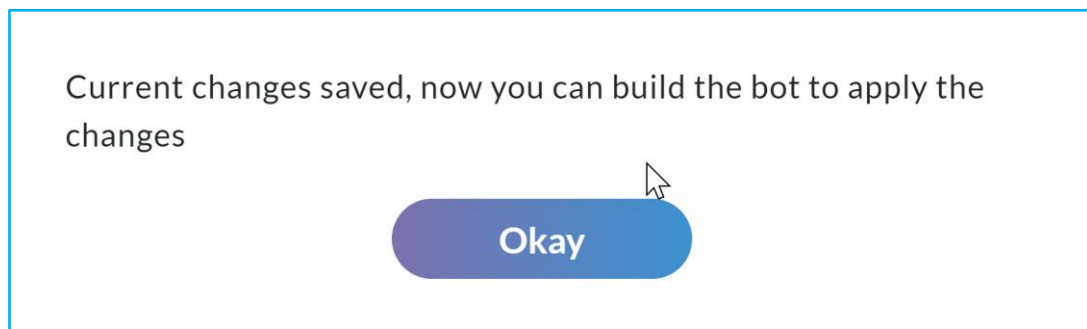



Figure 74: A confirmation message will appear on the screen after saving the changes.

 If you click on the [+] button at the top right-hand corner you will have a couple of options like Switch Toggle, Radio Toggle, Text Field, Number Field, Text Array Field, Group and Object Group. However, these are hardcoded options in this section. So if you want to add any of these fields we recommend you to contact us. Our backend team will help you to add these to customise the chatbot.



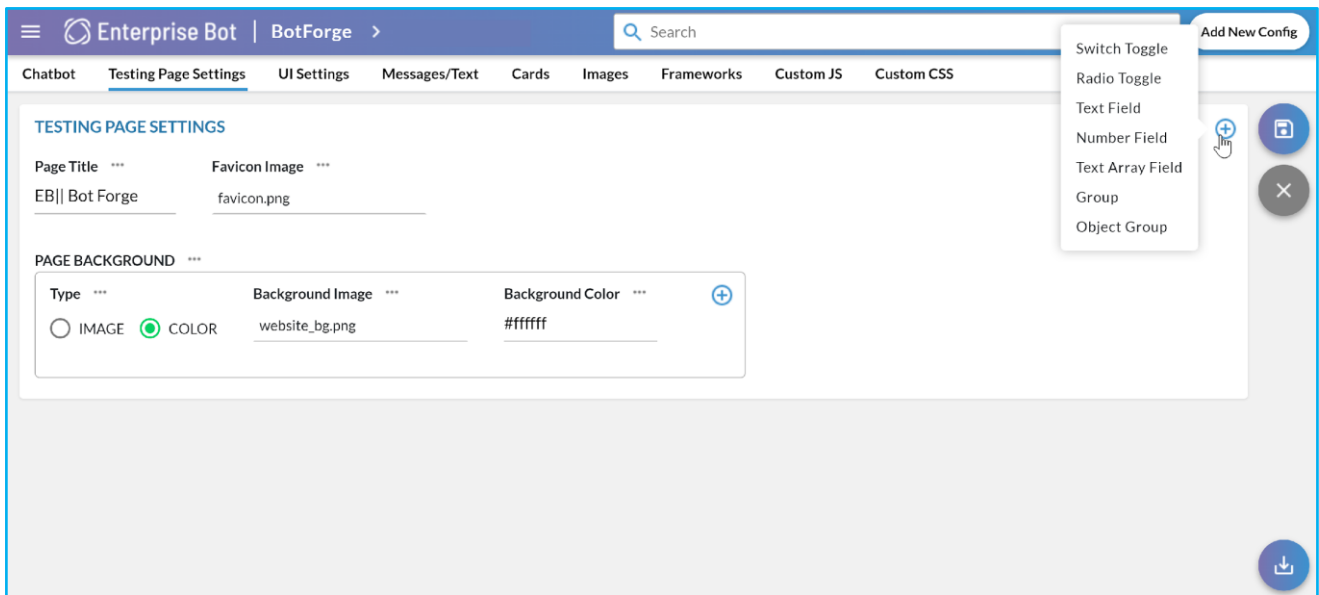


Figure 75: Hardcoded list of options in the testing page settings.

ABOUT THE UI SETTING

The third menu on the BotForge page is the **UI Settings**. Under the UI Settings menu, a set of options are available which you can use to customise and get a feel of the Chatbot on the webpage for visual improvement. This page contains the following options by which you can change the UI Settings of the chatbot that you have created.

HOW TO CUSTOMISE THE USER SIDE SETTINGS

The first option under the UI Settings page is about the User Side Settings. This section provides the feature to toggle you the view, position and overall functionality of the Chatbot Window and the Chatbot button on the webpage. The section includes the following options:

1. User Side Settings

- [Basic Settings](#)
- [Chat Header](#)
- [Chat Auto Open](#)
- [EB Link Header](#)
- [Loading Page](#)
- [Disclaimer](#)
- [Popover](#)
- [Suggestions](#)
- [Tutorials](#)
- [Feedback](#)
- [Close Confirming Message](#)
- [Like Dislike](#)

2. Agent Side Settings





OPTIONS IN THE BASIC SETTINGS

The first option under UI Settings is the User Side Settings. This option provides you to change the view, position and overall functionality of the chatbot which you have created. The toggle option includes the Theme Creator, Persistent Sessions, Auto Open Suppress, Webshop, Ls Prefix, Accessibility and User Icon.

- **Theme Creator:** This is used to apply the colour schematic on the webpage, which has been set up by you on the Chatbot2Go page. If you want to apply the change of the colour which you have set, simply toggle the button to switch on.
- **Persistent Sessions:** This option helps you to enable the feature where the Chatbot will continue to be active throughout multiple pages or tabs on the website. If you want to enable this feature to be on simply toggle the bar.
- **Auto-Open Suppress:** If you don't want the chatbot window popup to open automatically, then you need to switch on the Auto-Open Suppress to be on by using the toggle button.
- **Webshop:**
- **Ls Prefix:** This is a text field. If you are using two different chatbots in the same browser you need to specify the Ls Prefix for both bots to avoid interruption in terms of the data or communication exchanges in two separate bots. The Ls Prefix value should be unique for the two different bots which you are using on the same browser.
- **Accessibility:** This unique feature is created to help organisations to build virtual assistance that could help individuals with visual disabilities. If you want to build a chatbot that is compatible with Visual Readers and other tools, you need to toggle the button to enable the option. The chatbot will essentially help the user who is visually impaired.
- **User Icon:** You can enable or disable the User Message Icon that appears on the Chat Window on the webpage. If you don't want the icon to be displayed on the chat window then the **[Required]** option should be disabled. If you enable the option then the User Message Icon will be displayed on the chat window.

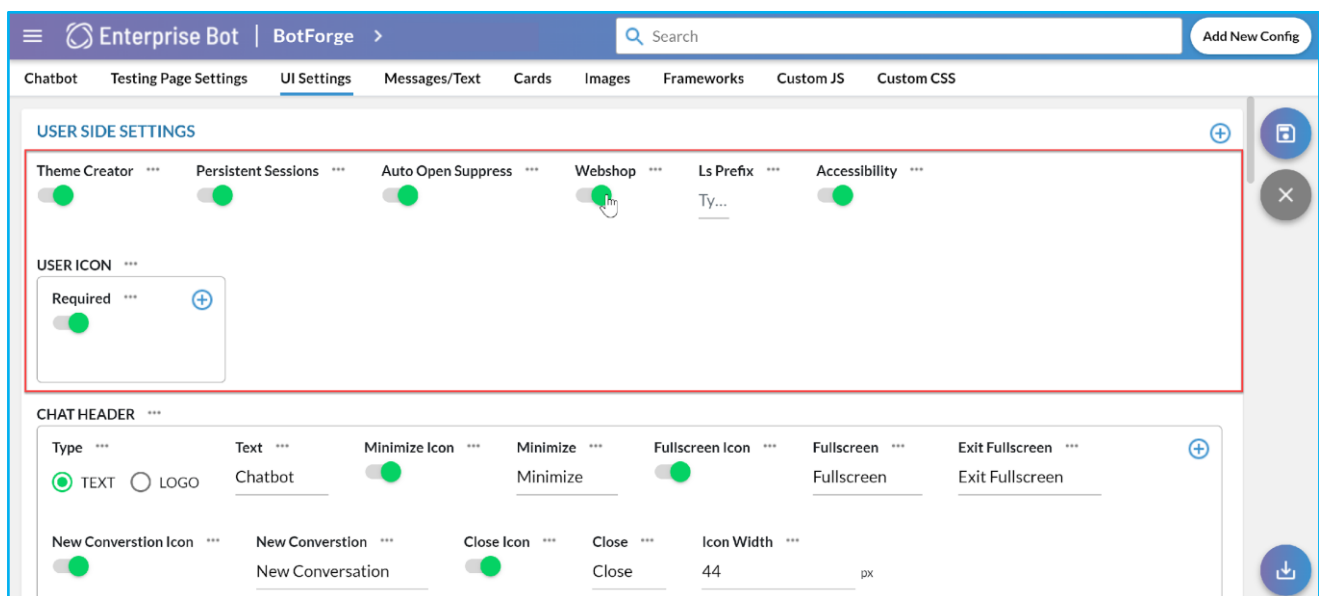


Figure 76: Customisation options in User Side Settings

OPTIONS IN THE CHAT HEADER

The chat header option has a couple of options. By using the following option you can customise your bot.





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- **Type:** You can determine the chat header type from here. You can select the chat header as Text or Logo. (Option 1 shown in the figure).
- **Text:** If you select the chatbot header to be the text you need to enter the text. E.g. The header is Help Bot. (Option 2 Shown in the figure)
- **Minimise Icon:** To show the minimise icon on the header toggle this option. (Option 3 shown in the figure)
- **Minimise:** It is a text field to show the message when you hover the mouse on the Minimise Icon.
- **Fullscreen Icon:** To show the fullscreen icon on the chat header toggle this option.
- **Fullscreen:** This option is used to full screen the chat window from the chat header.
- **Exit Fullscreen:** On mouse hover on the chatbot header you can see Exit Fullscreen.

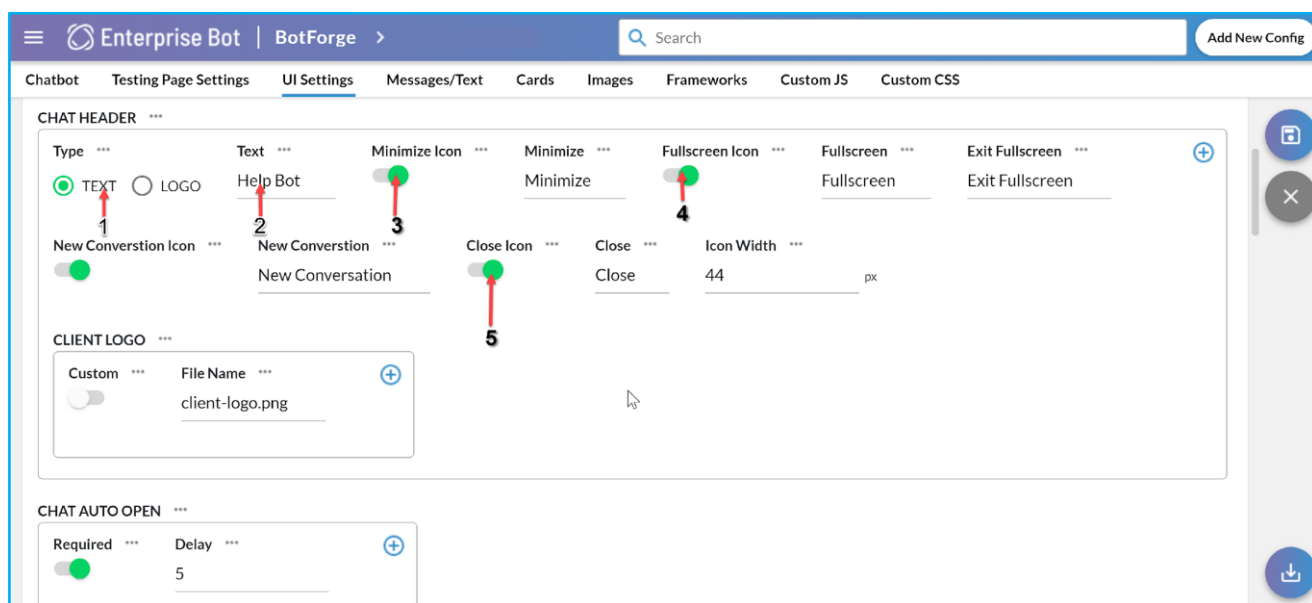


Figure 77: Option to customise the Chat Header

- **New Conversation Icon:** To enable the New conversation Icon on the chat header toggle the option.
- **New Conversation:**
- **Close Icon:** To enable the Close Icon on the chat header toggle the bar. (As shown in the above figure 5)
- **Icon Width:** This determines the width of the Close Icon on the chat header.

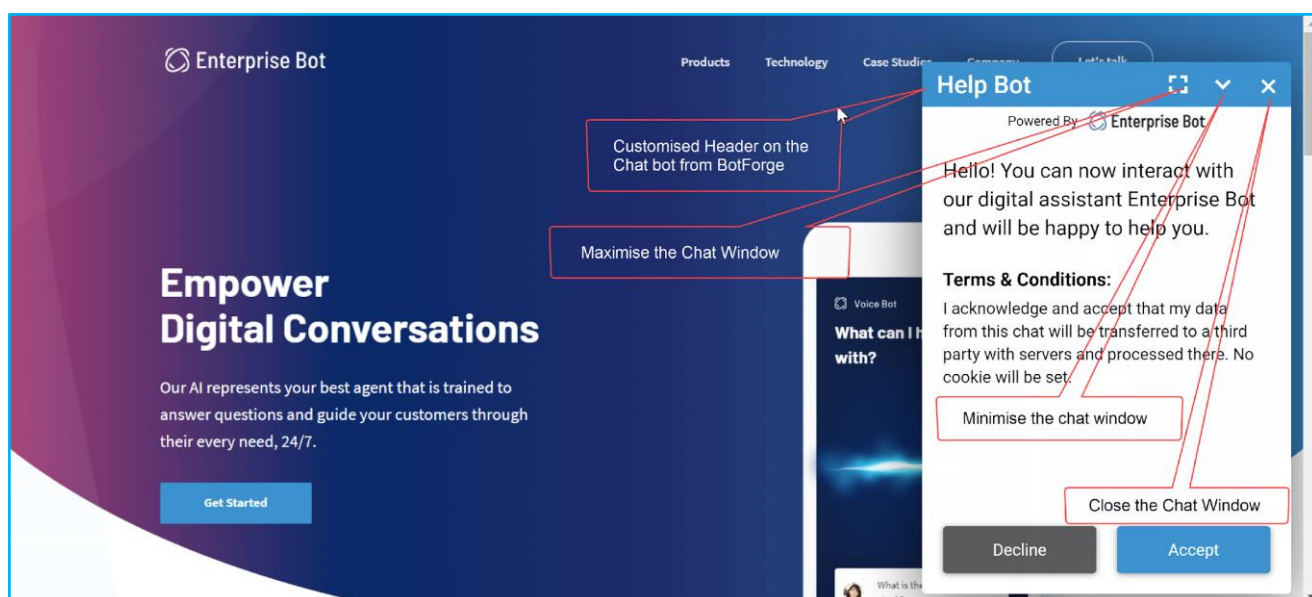




Figure 78: Customised Header with Minimise and Close option on the Chatbot Header.

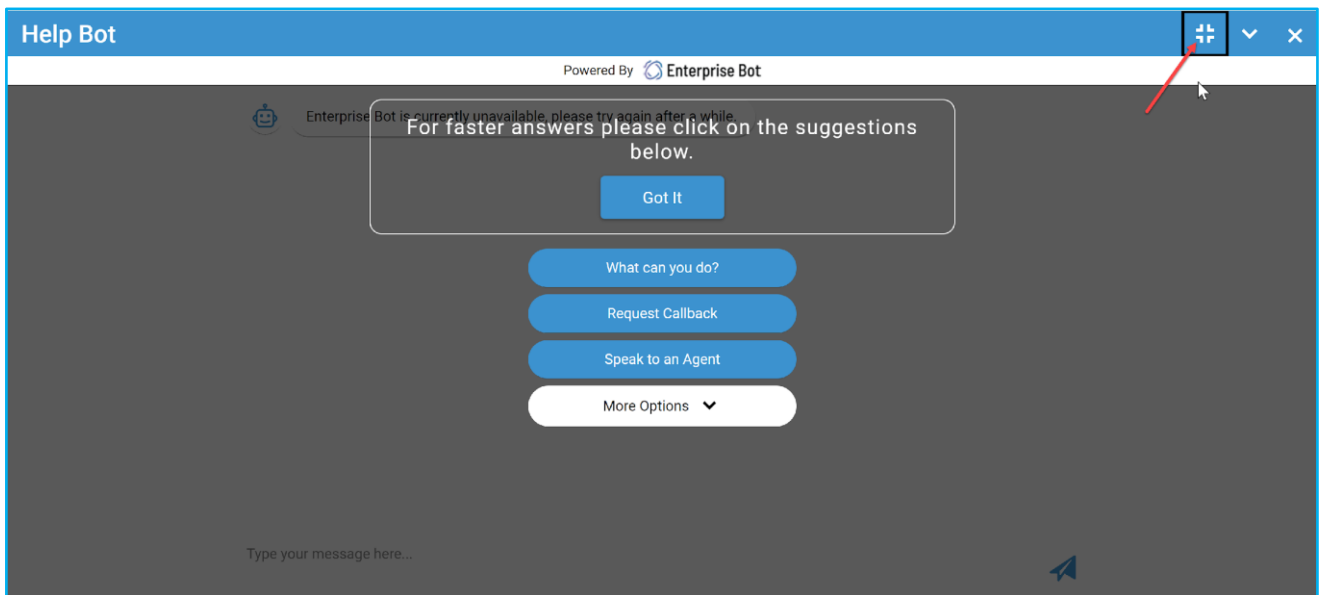


Figure 79: Full-Screen view of the Customised Chatbot.

OPTIONS IN CHAT AUTO OPEN

Chat Auto Open: If you want the Chat Window to open up automatically on the webpage when the Persistent Session is on, then you need to toggle the Chat Auto Open option to be ON.

Delay: This is a numeric field. This is used to specify the delay required for the Chat window to open up. The delay is counted on seconds.

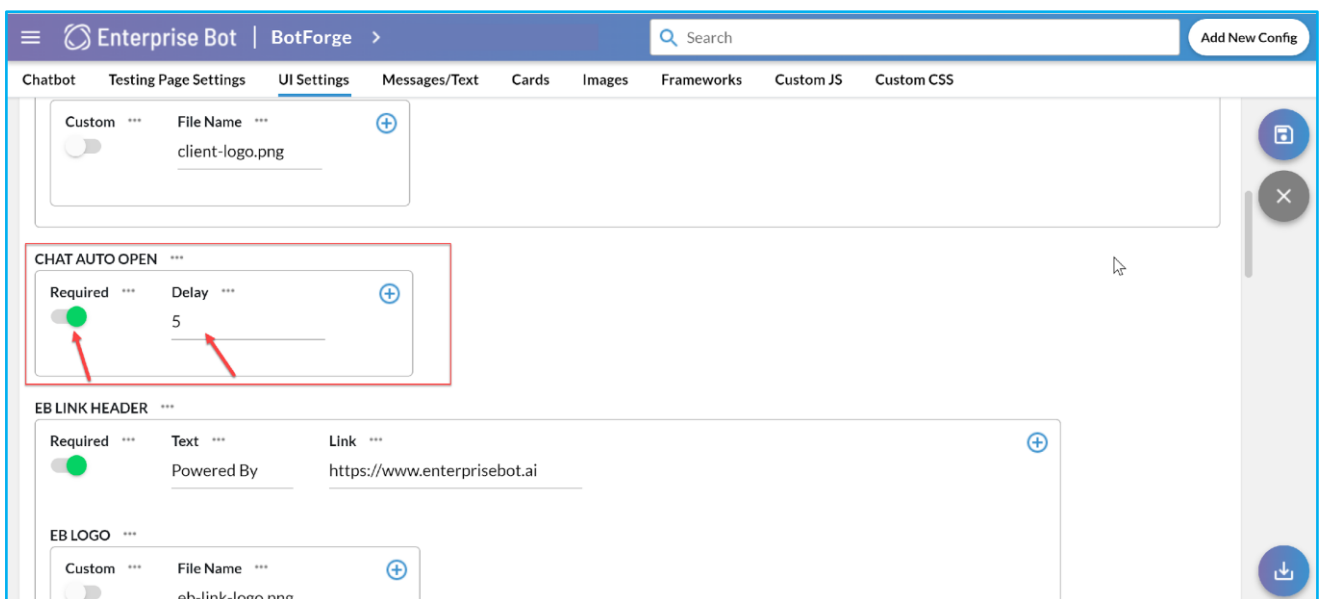


Figure 80: Option to enable Chat window open automatically and the delay

OPTIONS IN EB LINK HEADER





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You can use this section to edit the supporting text, logo and hyperlink which is displayed in the chat window.

1. **Required:** To enable the option to display the supporting text, logo and hyperlink, toggle the button to switch it on to customise.
2. **Text:** The text which you have entered will appear on the EB link Header.
3. **Link:** You need to enter the link so that the bot can fetch the URL.
4. **EB Logo:** If you want to customise the EB Logo toggle the Custom option.
5. **File Name:** You must enter the logo file name so that it can be uploaded.

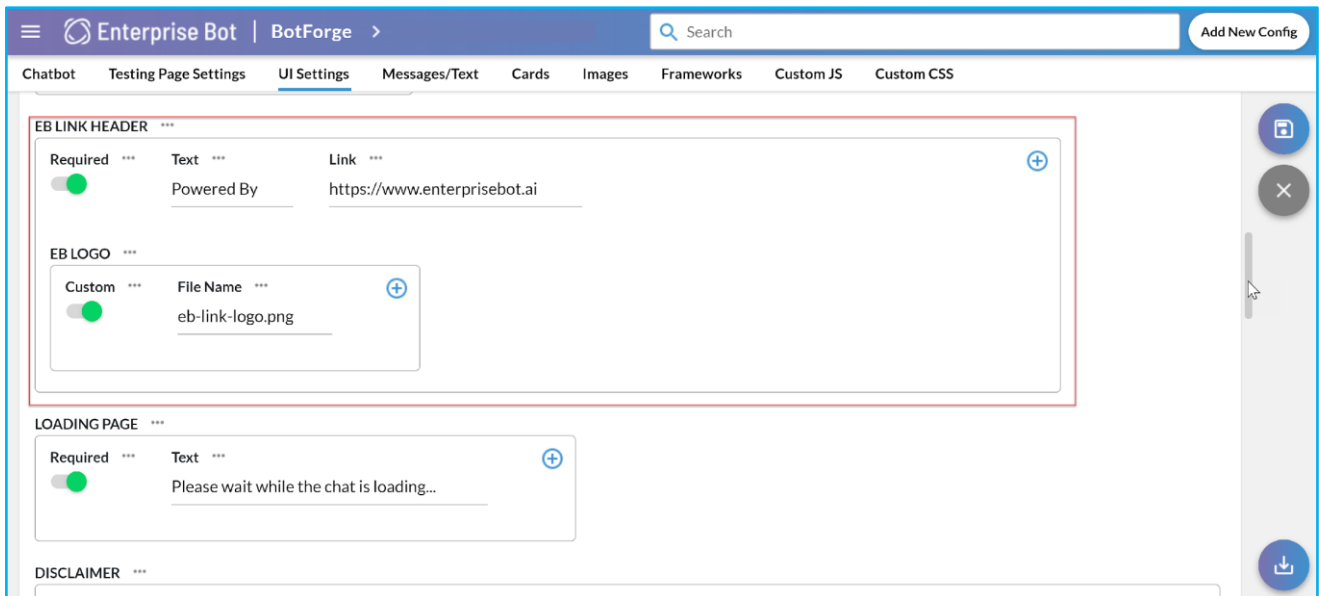


Figure 81: Option to customise the EB Link Header and EB Logo

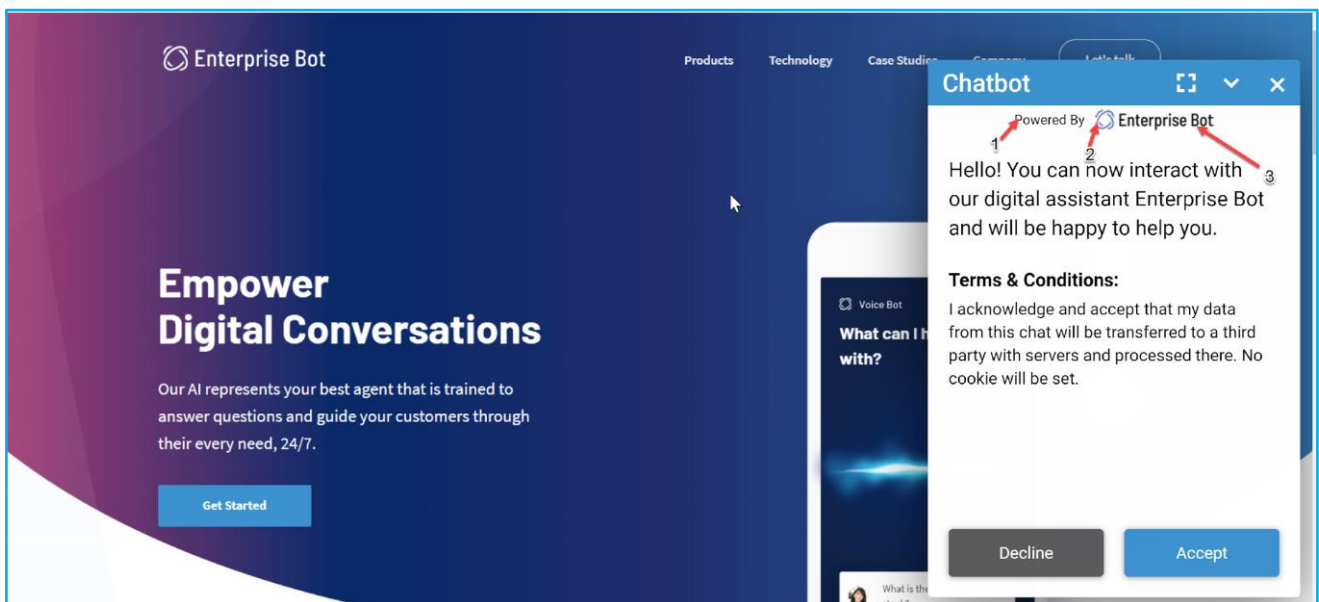


Figure 82: Values entered in the EB Link Header appears on the Chatbot window.

ABOUT THE LOADING PAGE

The loading page option provides you to enable them to enter the text while it loads on the website.





User Manual of ChatBot Admin

Required: Toggle this option to enable the chatbot to load on the website.

Text: This is a text field. Enter the text here which will be displayed while the chatbot is loaded on the website/landing page.

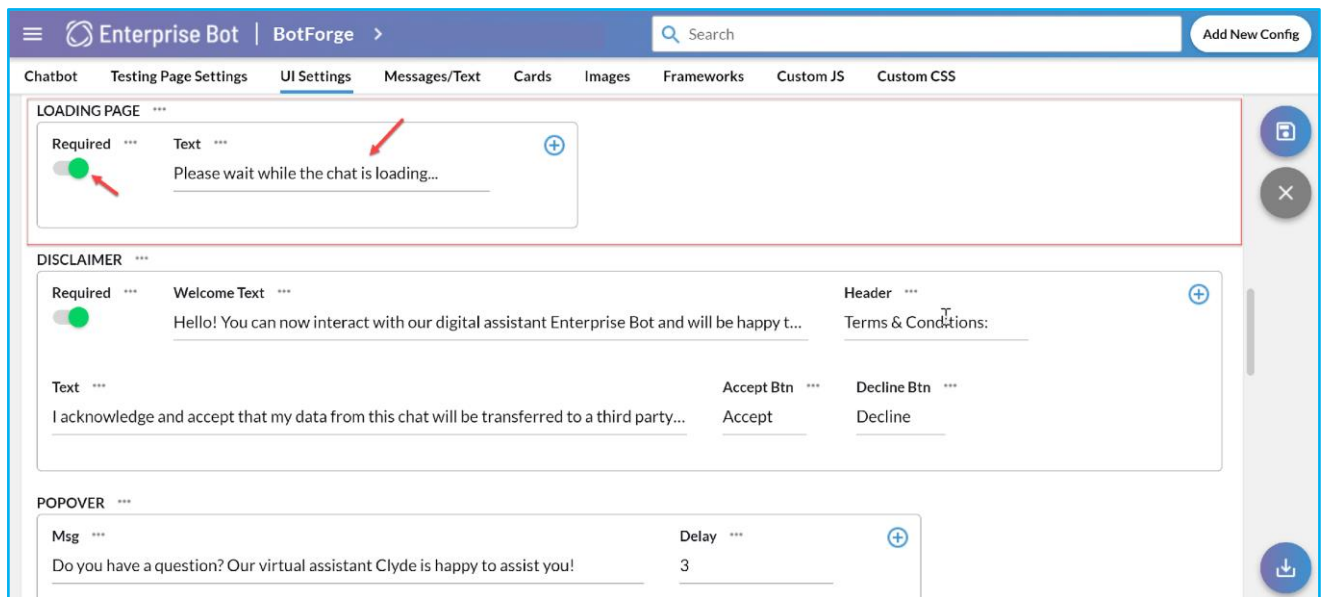


Figure 83: Options in the Loading Page section

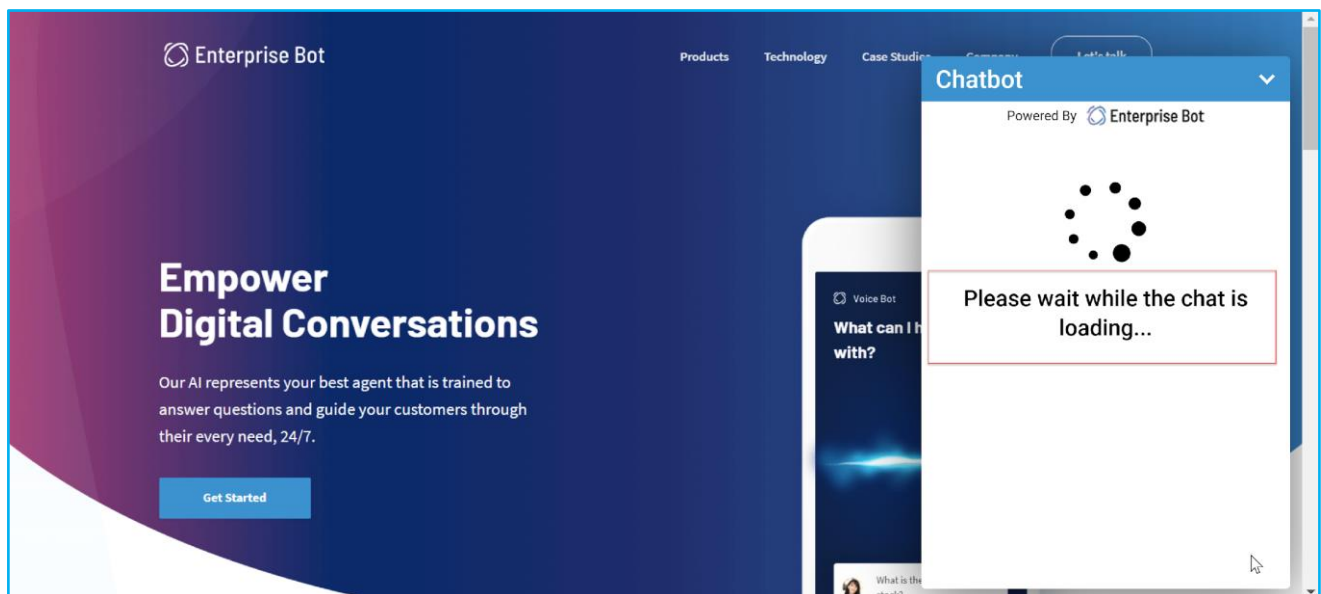


Figure 84: Chatbot loading on the website and the text is displayed while loading

ABOUT THE DISCLAIMER SECTION

This section contains the Disclaimer when you open the chatbot at the beginning of the conversation.

1. **Required:** Toggle the Required option to show the disclaimer.
2. **Welcome Text:** This is a Text field. You need to enter the Welcome Text for the user here and this will be populated on the chatbox at first on every session you initiate the chat.
3. **Header:** This is a text field. In general, you can keep the text as Terms & Conditions.





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4. **Text:** This is a text field. The text you have entered here will be displayed in the chat window. E.g. if the Header is Terms & Condition, you need to enter appropriate text.
5. **Accept Btn:** At the bottom right-hand corner you will see the Accept button. To continue with the conversation with the chatbot you need to click Accept. You can customise the wordings [Accept] from here.
6. **Decline Btn:** Just at the left-hand side of the Accept button, there is the Decline button. You can change the wording Decline to your desired one. However, if you click on the Decline button that essentially means you don't agree with the specific terms & conditions. Eventually, you will not be able to proceed with the conversation.

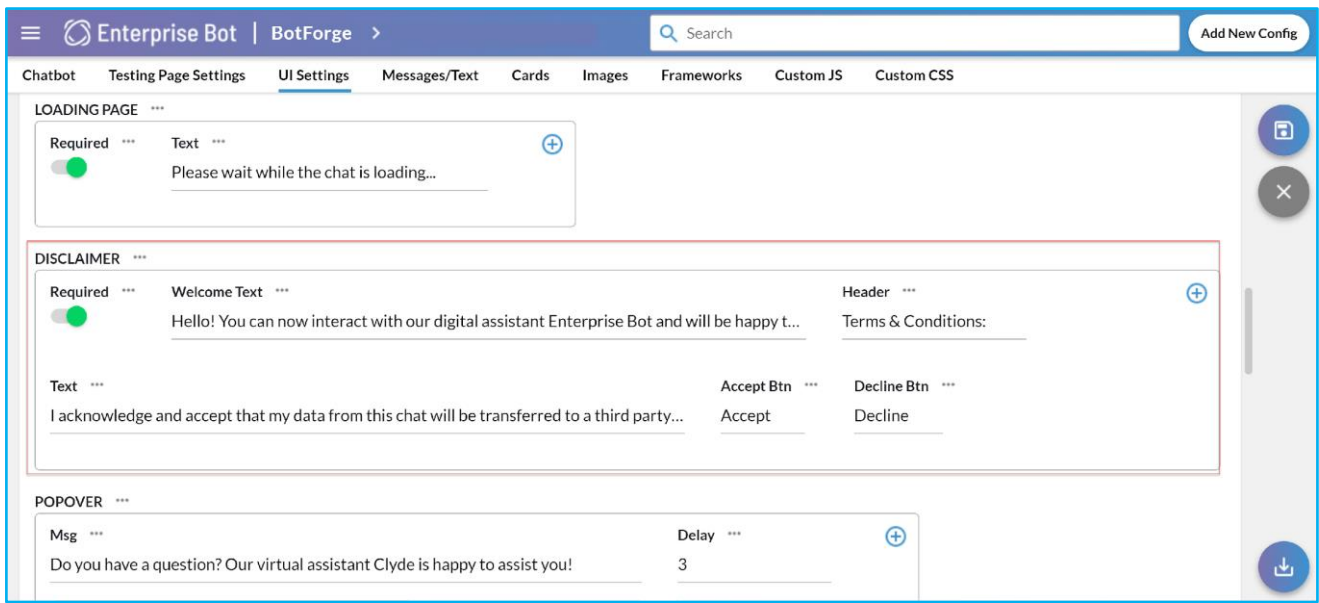


Figure 85: Disclaimer section of the Chatbot to customise

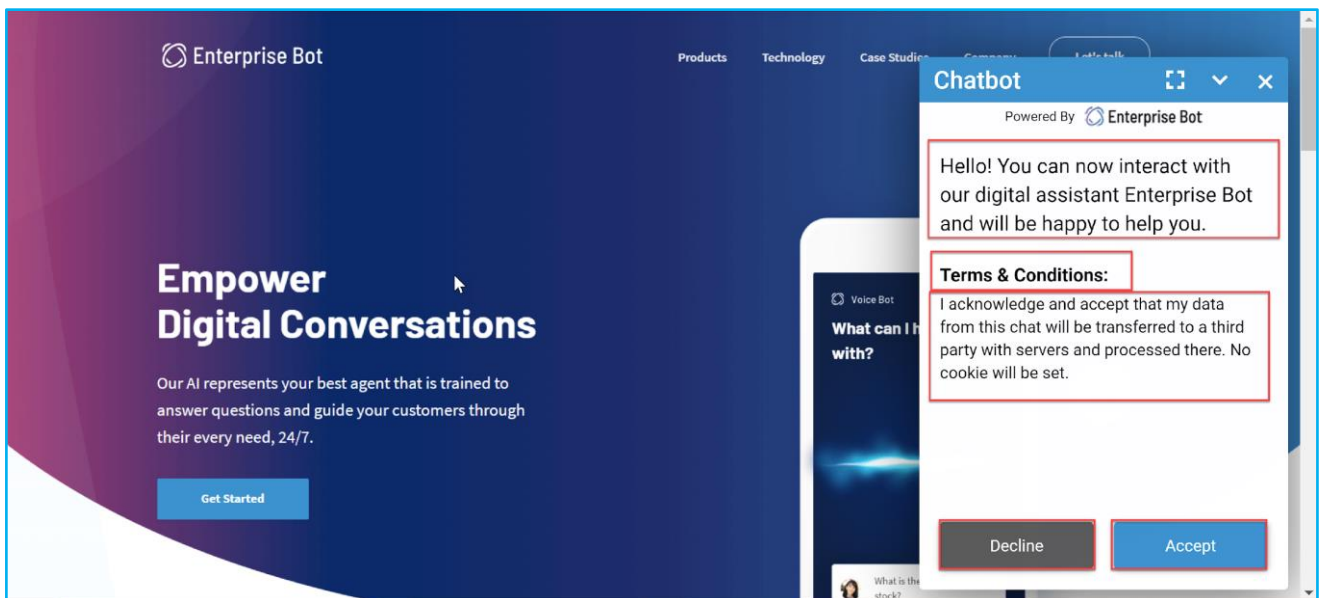


Figure 86: Disclaimer information entered in the Botforge section appears on the ChatBot.

ABOUT THE POPOVER





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On mouse hover on the chat icon on the website for the first instance, you can set a message from this section. This section includes the following options.

1. **Msg:** This is a text field. The information you enter here will be displayed when you hover the mouse on the Chat icon on the Webpage.
2. **Delay:** The delay field is used to specify the delay required for the message to be displayed. The delay is counted in seconds.

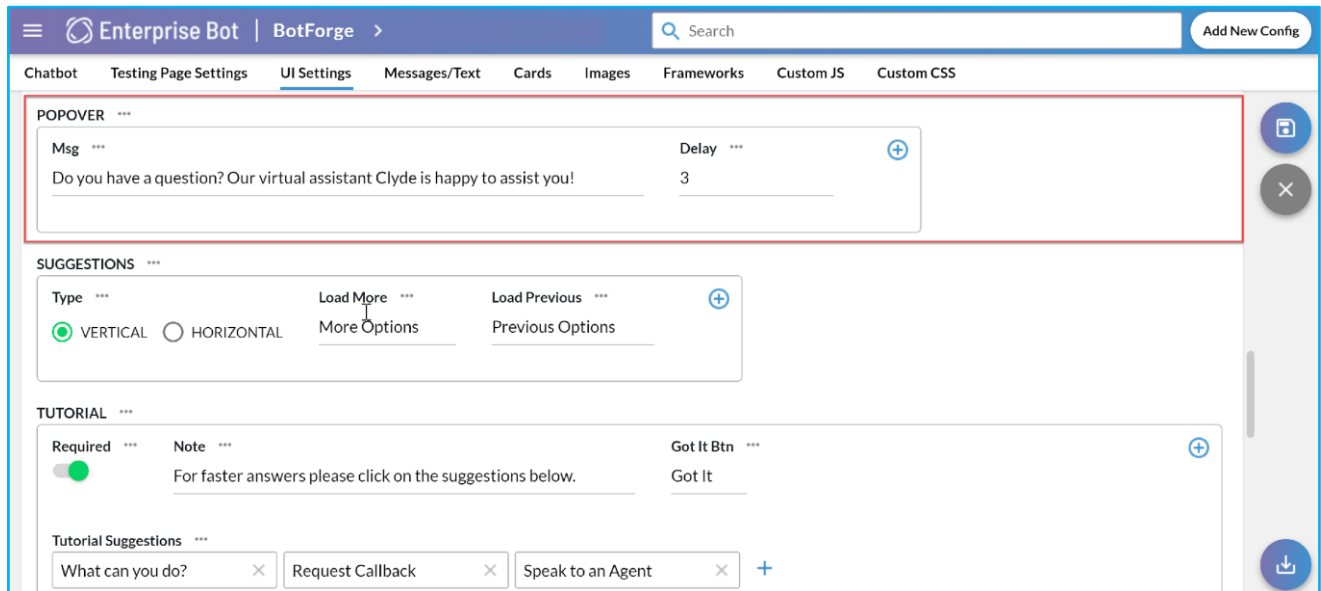


Figure 87: Popover section to enter the customised text and the delay

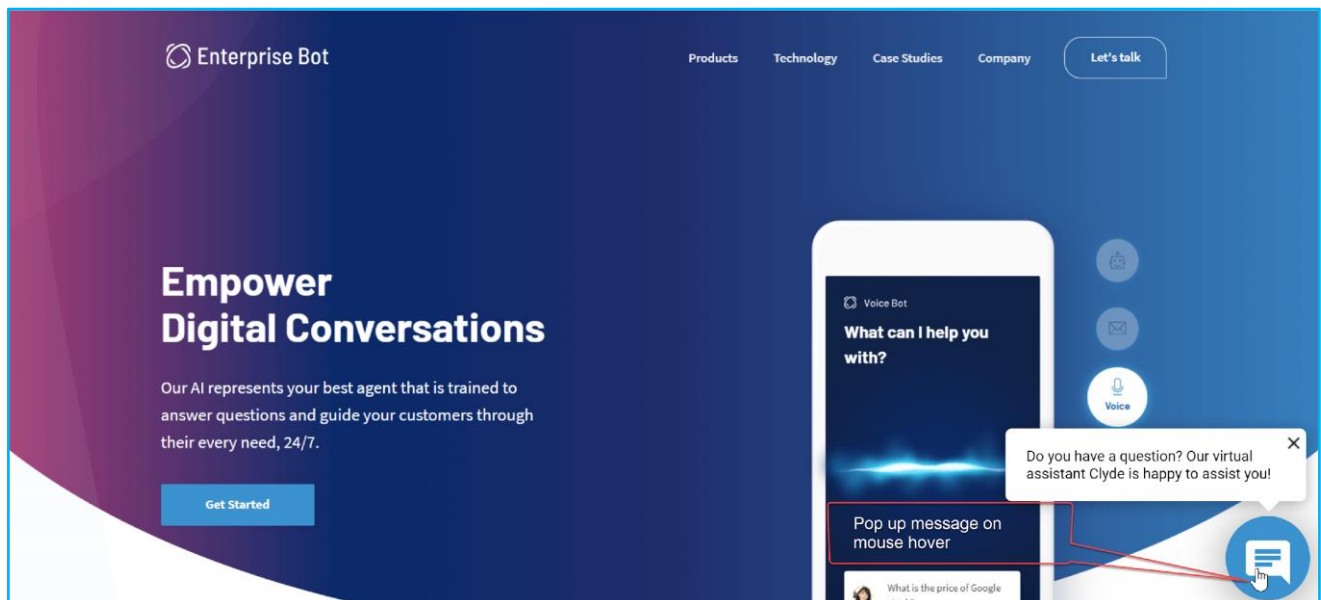


Figure 88: Popover message appears on the chat icon on the website

ABOUT THE SUGGESTIONS

From this section, you can customise how the Suggestions will appear on the Chat window. According to your requirement, you can set the position from here by using the following option.





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1. **Type:** You can set the suggestions either vertically or horizontally. Based on that you need to select the radio buttons for **[VERTICAL]** or **[HORIZONTAL]**.
2. **Load More:** This is a text field. So if you want to see more you can use this section by entering the text.
3. **Load Previous:** This is a text field to load the previous chat history.

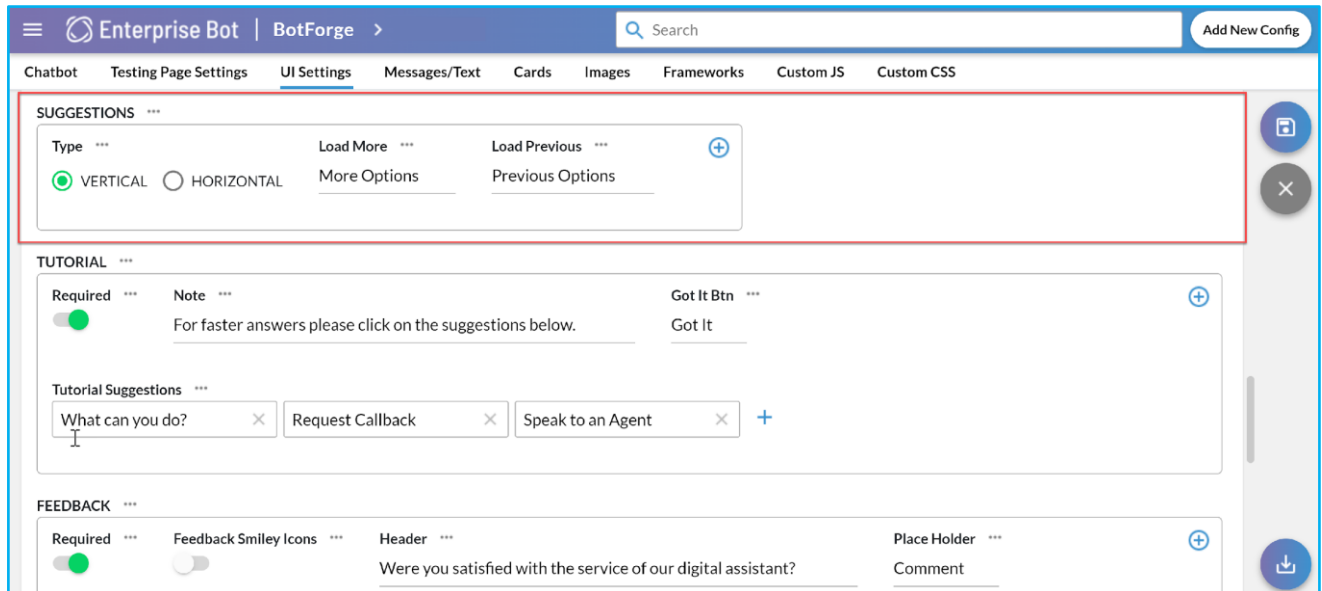


Figure 89: Customise your suggestion button in the chat window

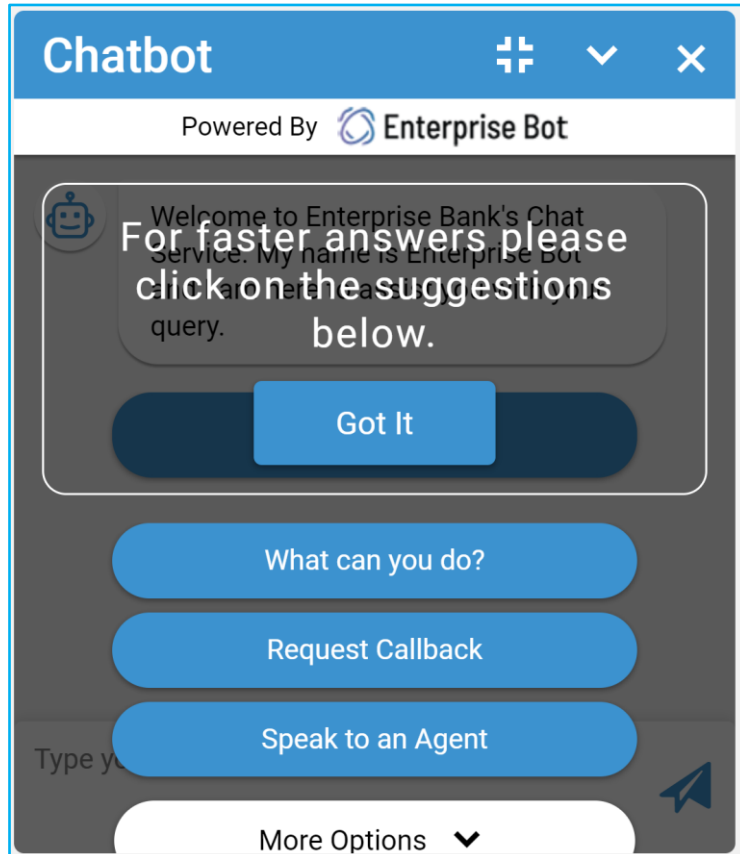


Figure 90: Suggestion placed vertically





OPTION IN THE TUTORIALS

This option allows you to edit and enable the tutorial section, which you can see on the Chat Window before the actual chat begins with your bot. The purpose is to deliver a quick in-time tutorial session for your user before they interact with the ChatBot that you have created.

1. **Required:** Toggle the button to enable the tutorial option on the chat window.
2. **Note:** In this text field you can enter or modify the relevant text,
3. **Got It Btn:** This is a text field against the Got It Button. You can customise the text of the button.
4. **Tutorial Suggestions:** In all the Tutorial Suggestion box you need to enter the relevant text for the suggestion. E.g. What can you do? , Request Callback and Speak to an Agent. You can also modify the suggestions based on the requirement from here which could make your chatbot more efficient.

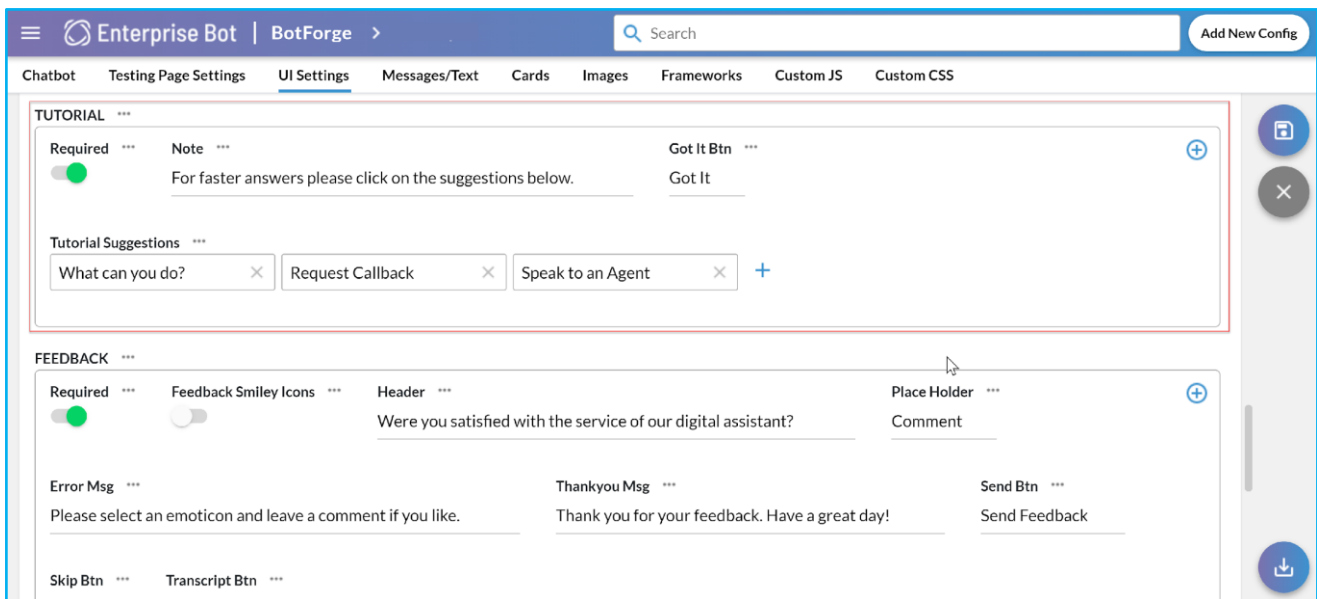


Figure 92: Tutorial options in the Botforge Page.

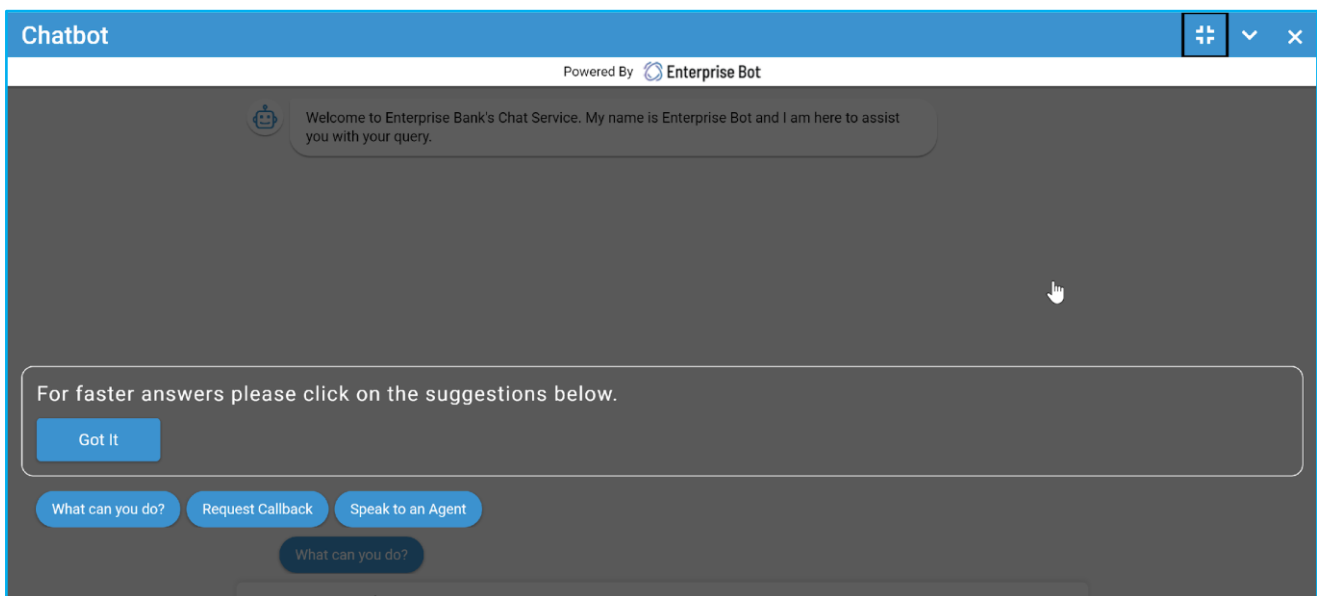


Figure 93: Tutorial option available on the Chatbot before the actual conversation starts





ABOUT THE FEEDBACK SECTION

The feedback section allows you to toggle the header content to enable and edit the Feedback options. Feedback appears in the chat window after an interaction. This section includes the following options for customisation.

1. **Required:** Toggle the button to enable the option.
2. **Feedback Smiley Icons:** Toggle the button to enable the Feedback Smiley icons.
3. **Header:** This is a text field. You can ask the user how satisfied they are after interacting with your chatbot. E.g. Were you satisfied with the service of our digital assistant? You can modify or replace this text from here.
4. **Place Holder:** The text area where the user can enter their comments is normally labelled as Comments. If you wish to change the Placeholder Name, you can do it from here.
5. **Error Msg.:** This field is used to input the content which will be seen in case of error. E.g. Please select an emoticon and leave a comment if you like. If you want to change the content to customise use this field.
6. **Thankyou Msg:** This field is used when your chatbot accepts feedback from the user. E.g. Thank you for your feedback. Have a great day! If you wish to change the message you can customise it from this field.
7. **Send Btn:** This is used to send the feedback. This is a text field. You can put a caption like **Send Feedback**. To customise or rephrase the wording use this field.
8. **Skip Btn:** This is a button when the user doesn't want to participate to provide feedback and simply skip this. In general, the caption is Skip for the button. If you want to customise change it from here.
9. **Transcript Btn:** This is a button mainly used to download the chat transcript. In general, the caption is Chat Transcript. However, if you want to change is the label for customisation you can do it from here.

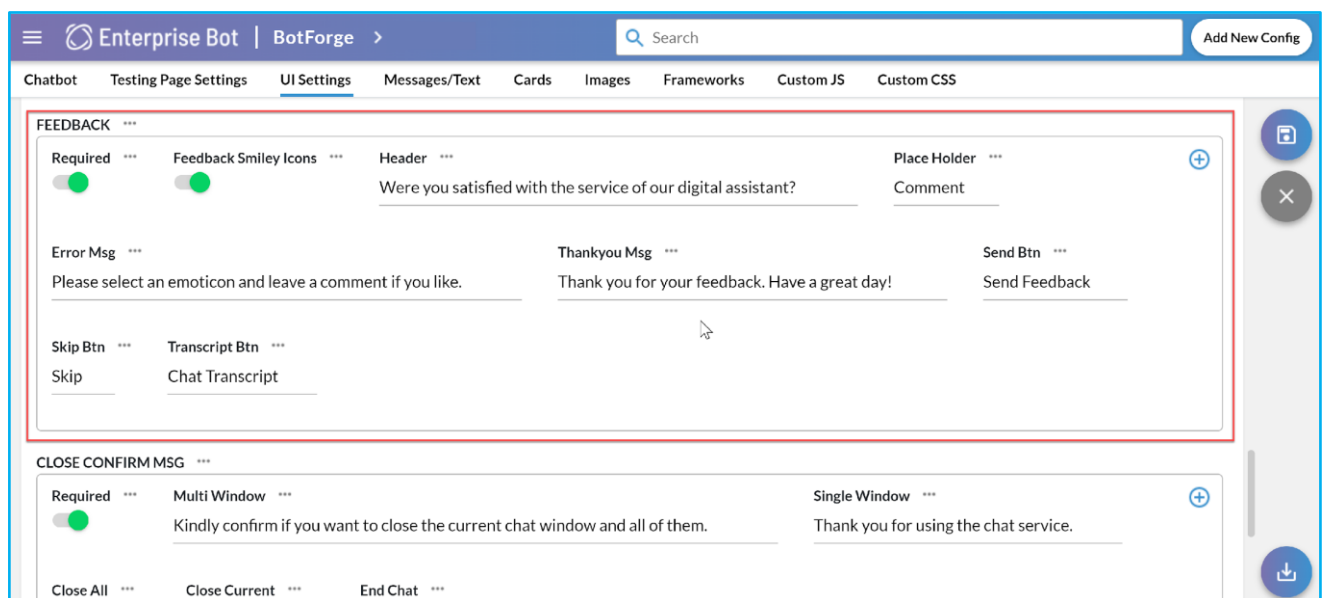


Figure 94: The Feedback section in the Botforge for customisation.



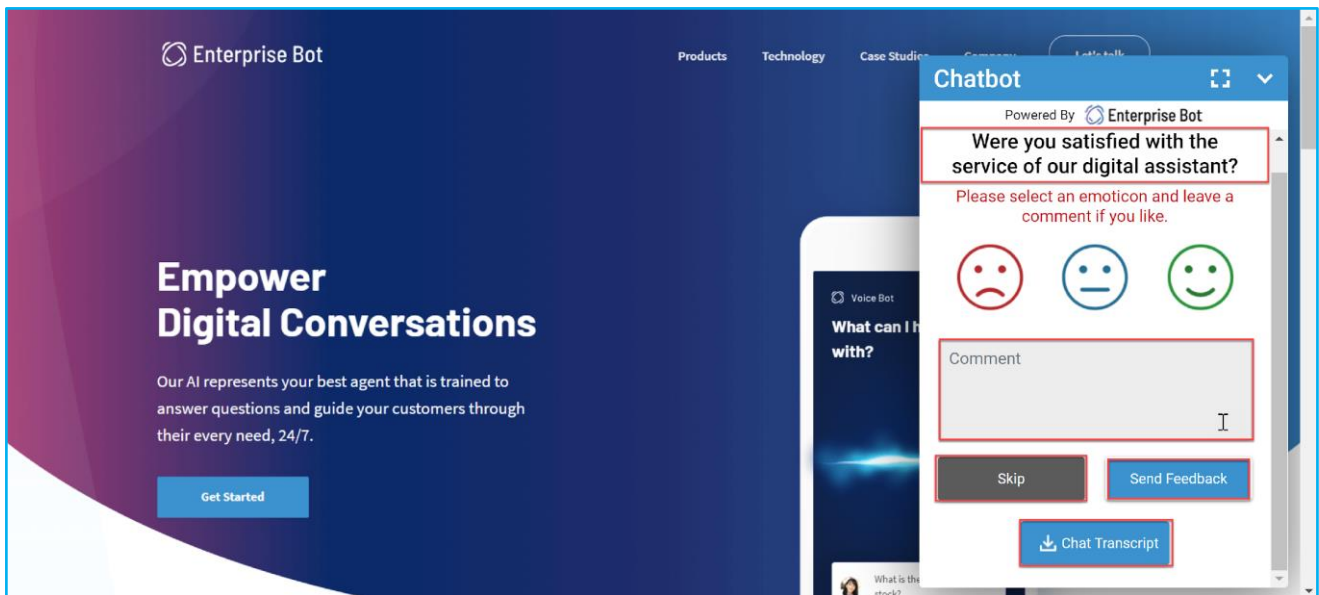


Figure 95: Feedback Header with the Placeholder and Smilies with other buttons on the Chat window

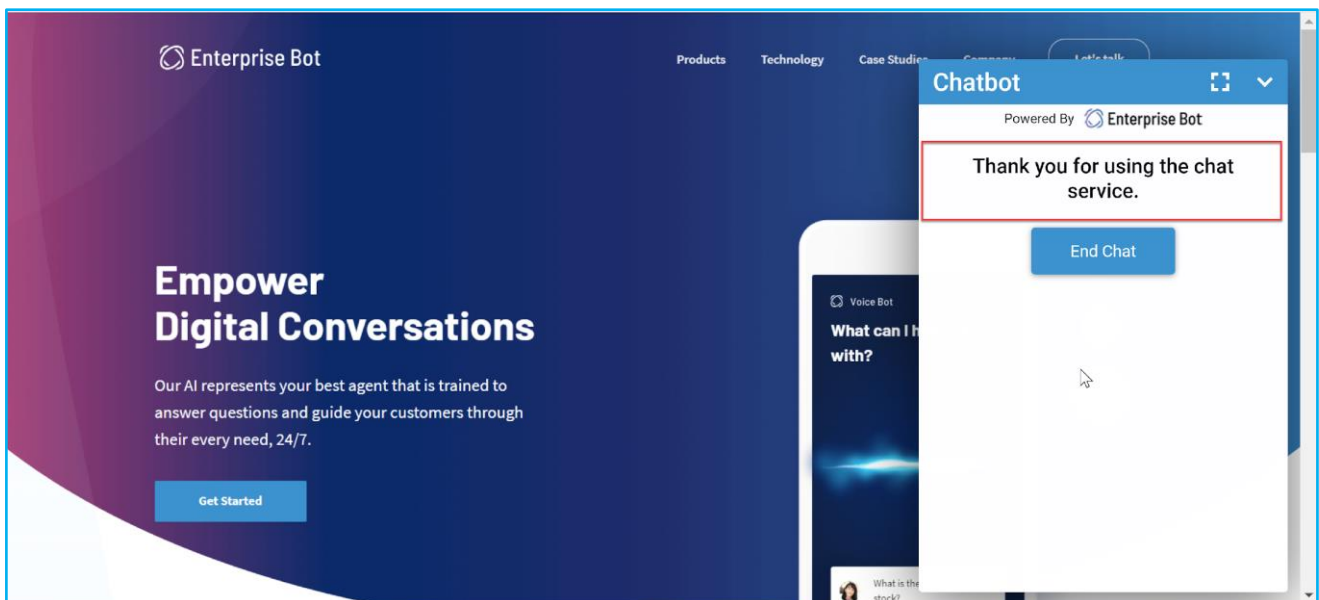


Figure 96: Message appears after clicking on the Feedback Icon (Smiley) and Sending out.

ABOUT THE CLOSE CONFIRMING MESSAGE

The Close Confirming Message is important when multiple chats sessions are open and you need to close them. If a persistent session is on, you can enable the Close Confirming Message and edit the buttons that prompt the user to terminate the session. This section includes the following options.

1. **Required:** Toggle the button to enable the Close Confirming message.
2. **Multi Window:** This is a text field. If you are on multiple chat windows you need to choose whether you need to close a specific one or all the chat. In general, a confirmation message like [Kindly confirms if you want to





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close the current chat window and all of them] appears. If you wish to customise this caption you can do it from here.

- 3. Single Window:** In case you are on a single chat window and the conversation ends and your bot needs to confirm you can end the chat by giving thanks for using the Chat service. The common caption is [Thank you for using the chat service]. If you wish to change this you can customise the message.
- 4. Close All:** This option will close all the active chats. So if you want to activate a button that ends the multiple sessions on all windows at once, activate this button with the caption Close All.
- 5. Close Current:** If you want to enable a button that will close the current window then activate this.
- 6. End Chat:** If you want to enable a button that closes a session on a particular window use End Chat.

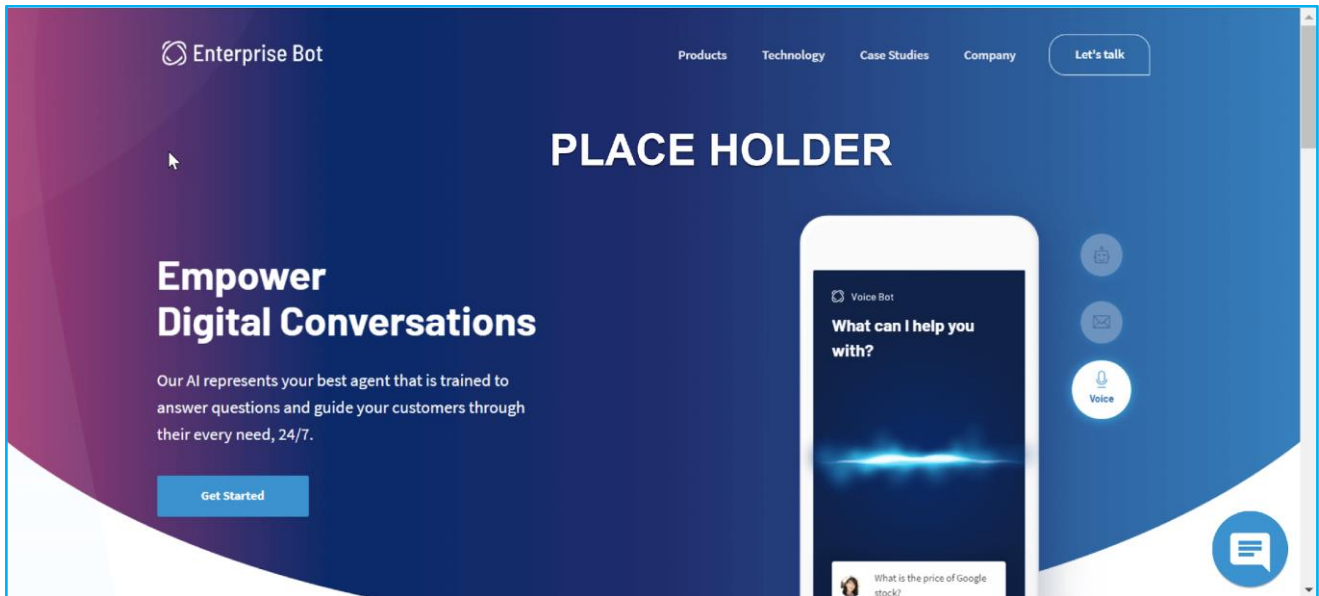


Figure 97: Place Holder (An Image will be added to replace the Place Holder)

ABOUT THE LIKE DISLIKE SECTION

This is a feature that you can enable for Like and Dislike. This option includes the following options.

- 1. Required:** Toggle the button to enable the option.
- 2. Like:** This is a text field. You can enter a caption like [I Like it!]. This reaction will appear in the chat window in a live session.
- 3. Dislike:** This is a text field. You can enter a caption like [I don't like it!]. This reaction will appear in the chat window in a live session.



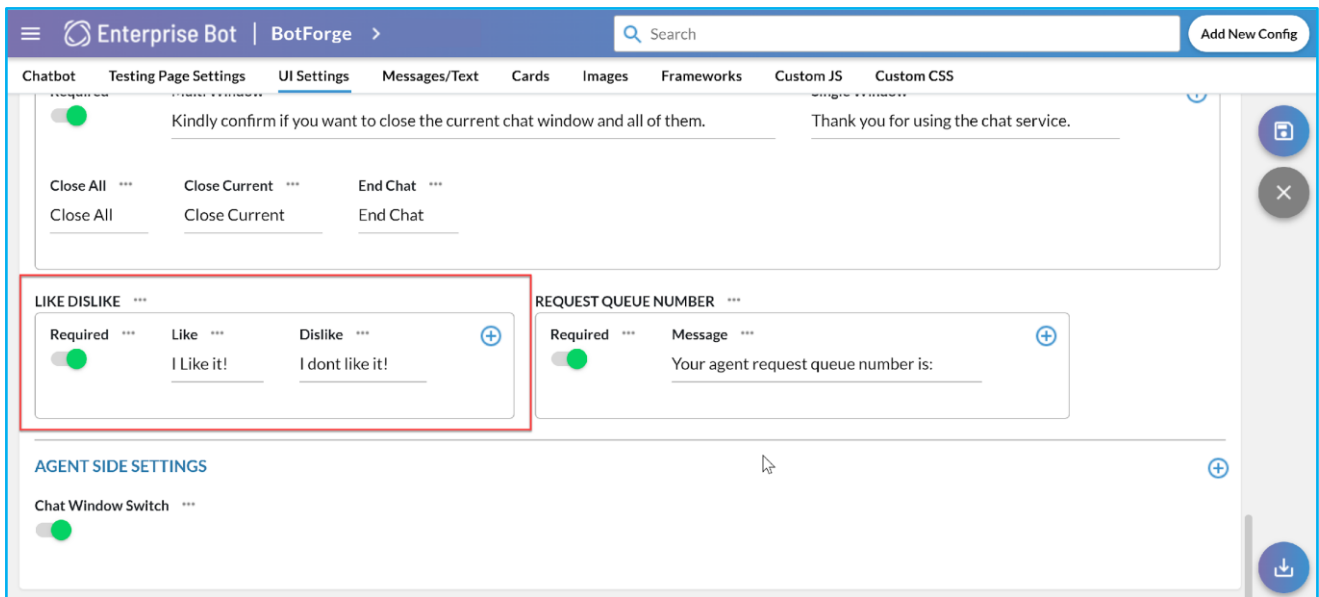


Figure 98: Enable and Customise Like/ Dislike reaction from Botforge

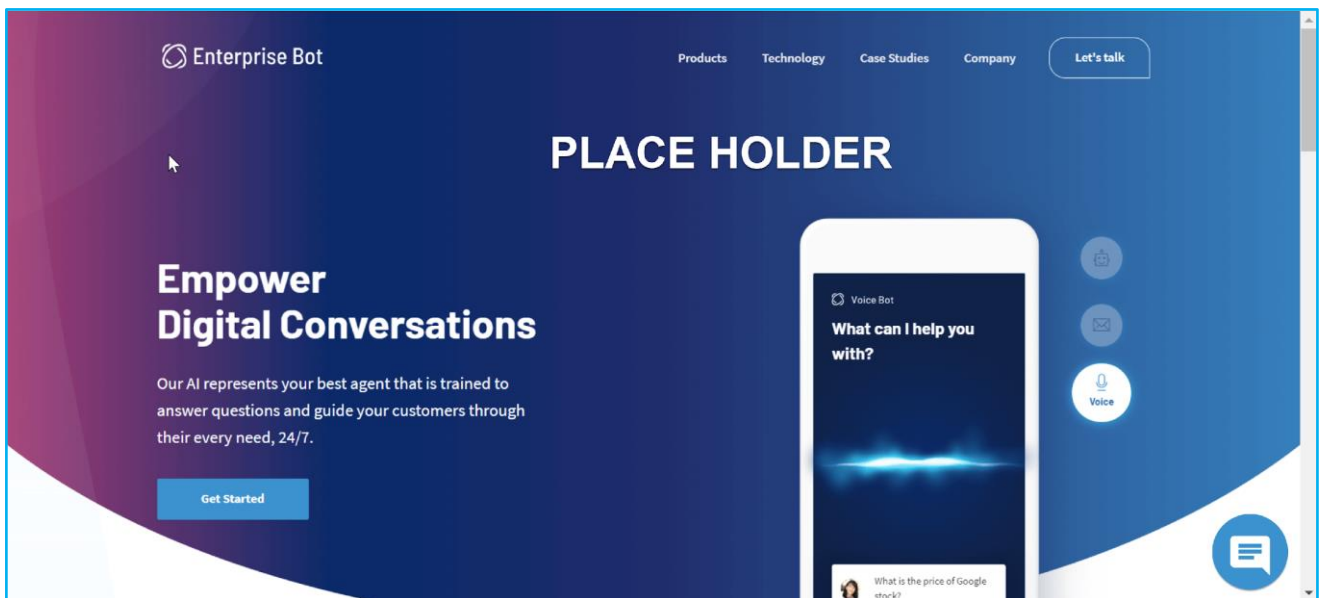


Figure 99: Place Holder (An Image will be added to replace the Place Holder)

ABOUT THE REQUEST QUEUE NUMBER

When a user wants to talk to an Agent either they get connected or they have to be in the queue if the Agent is busy handling other customers on the chat. When the Agent is busy, a queue number is displayed to the user to make them aware of their queue position.

This section includes the following options.

1. **Required:** Toggle the button to enable the option Request Queue Number.
2. **Message:** This is a text field where you can put a text like [Your agent request queue number is:] for the convenience of the user.



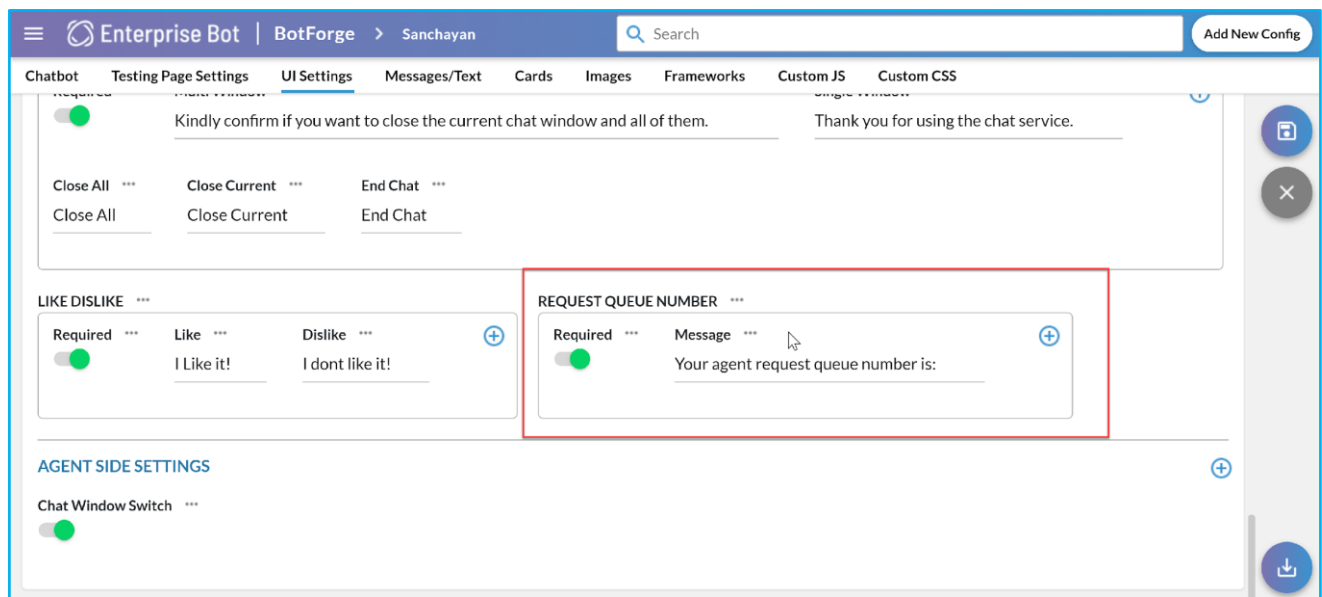


Figure 100: Enable and Customise the Request Queue Number in BotForge

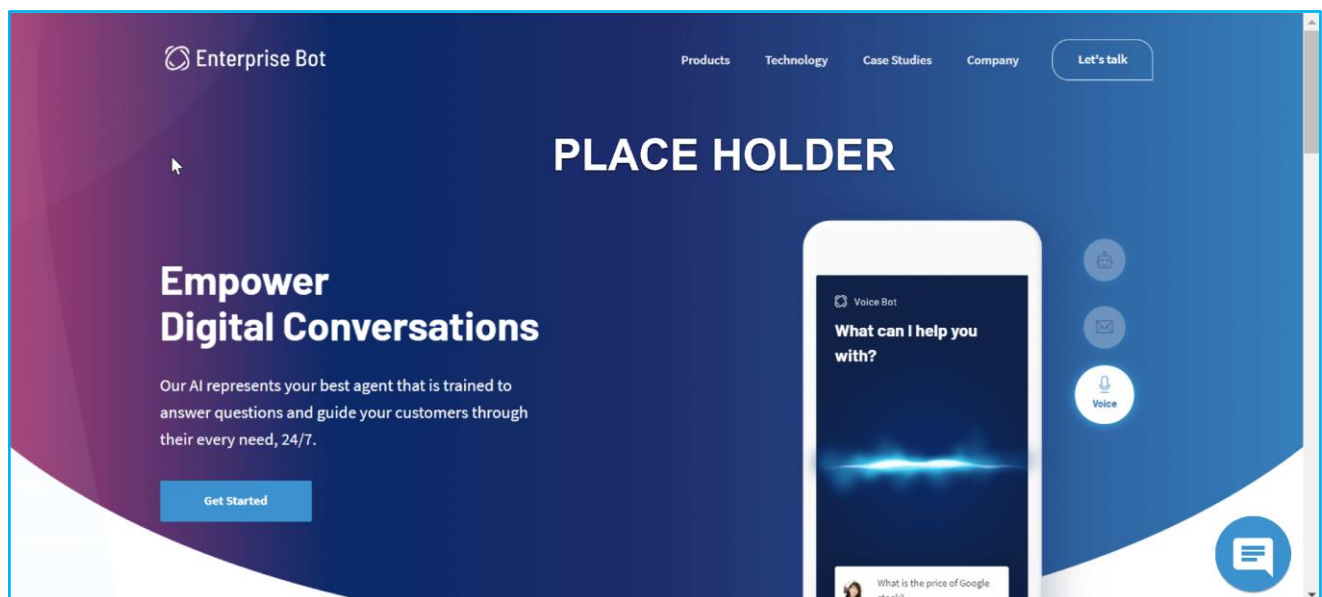


Figure 101: Place Holder (An Image will be added to replace the Place Holder)

ABOUT THE AGENT SIDE SETTINGS

This section allows you to customise the Agent Side Settings. If you don't enable it, the chat window will not be there in the agent.



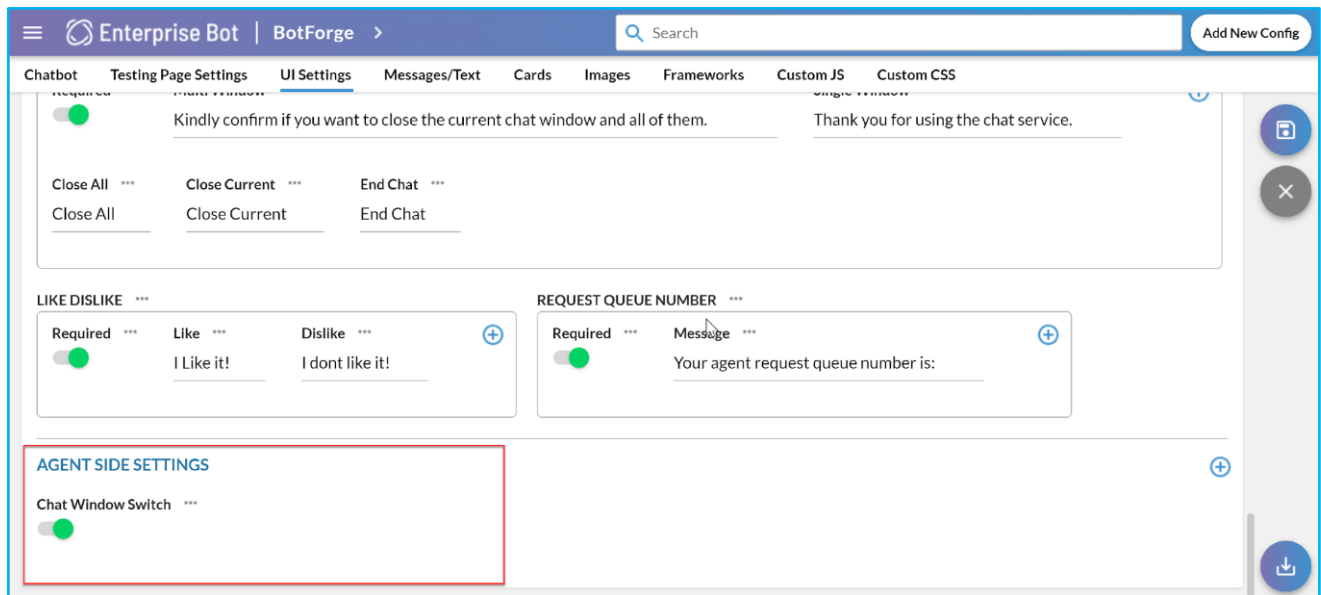


Figure 102: Option to enable Agent Side Settings

MESSAGES/ TEXT ON THE BOTFORGE

The fourth menu on the Botforge page is Messages/ Text. This section includes a couple of options that you can use to customise the contexts that prompt up on the webpage, it becomes visible. This option helps you to improve the chatbot in terms of visual effect in creating content that features the various prompts and warnings which is displayed on the Agent side of the hybrid chat. This section includes Misc Text, User REQ OFF, ALL Agent Busy, No Against Available, Error Sys Tout, Place Holder, Attachment and Chat Attachment.

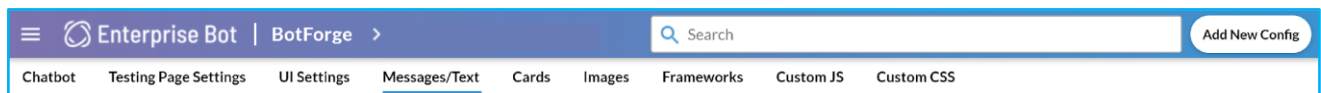


Figure 103: Messages/ Text Menu on the BotForge page

ABOUT THE MISC TEXT

The Miscellaneous Text section includes the following option. These options can be customised when an agent joins the conversation with the user in the chatbot.

- Session closed: This is a text field.
- Agent Join: This is a text field. The text you enter under this field will be displayed in the chatbox when an agent will join the conversation.
- Agent Left: This is a text field. The text you enter under this field will be displayed in the chatbox when an agent leaves the conversation with the user.
- Agent Present: This is a text field. The text you enter under this field will be displayed chatbox when the user will be connected.
- Session Max: This is a text field. You can enter text for showing an alert when the maximum number of chat sessions is opened.
- User Join: This is a text field. When a user gets connected with the agent the text will be shown as per the text input.
- User Left: This is a text field. The text entered under this field will be displayed when a user leaves a chat session.





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- Agent File button Msg.: When an agent sends an attachment to a user, the title of the attachment is entered here to be displayed in the chat window.
- Request Enable: This is a text field. When an agent enables the user's request the text under this field is displayed.
- Request Disabled: This is a text field. When an agent disable the user's request the text under this field is displayed.
- Chat Enabled: This is a text field. When an agent enables the user's chat the text under this field is displayed.
- Chat Disabled: This is a text field. When an agent enables the user's chat the text under this field is displayed.
- Agent Logout Confirm: This is a text field. The text under this field is displayed when an agent is logging out from the Hybrid Chat page as a prompt to notify the Agent that he/ she wants to log out from the Hybrid Chat platform.

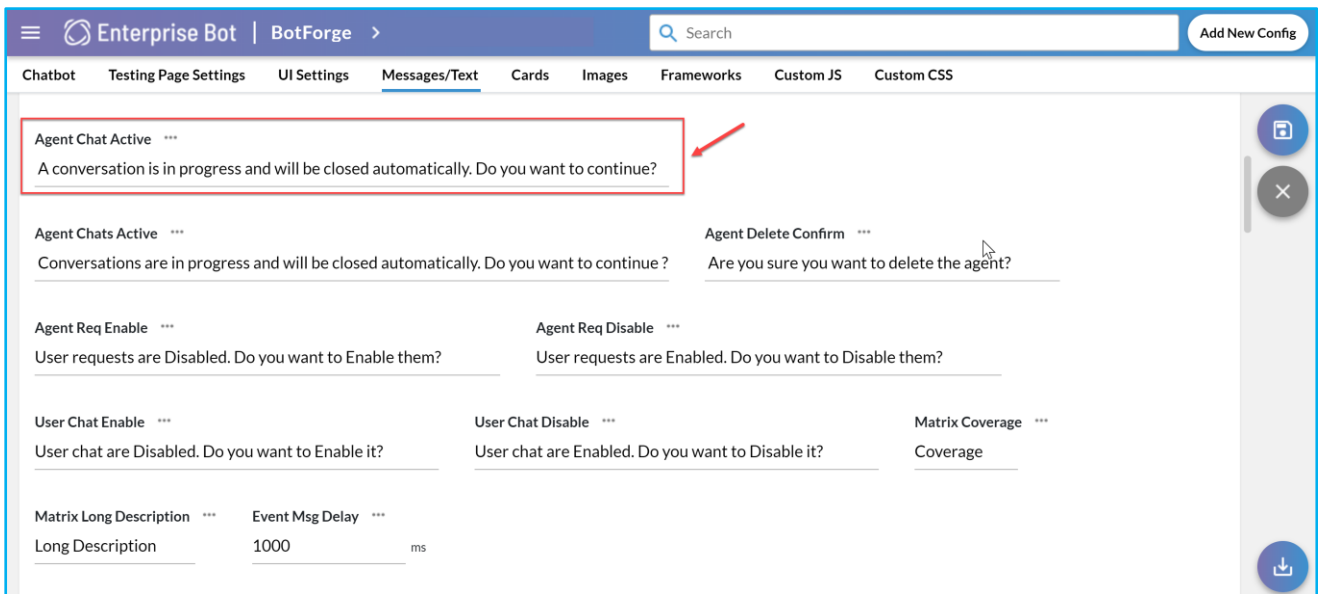


Figure 104: Text on the Agent Chat Active field in BotForge.

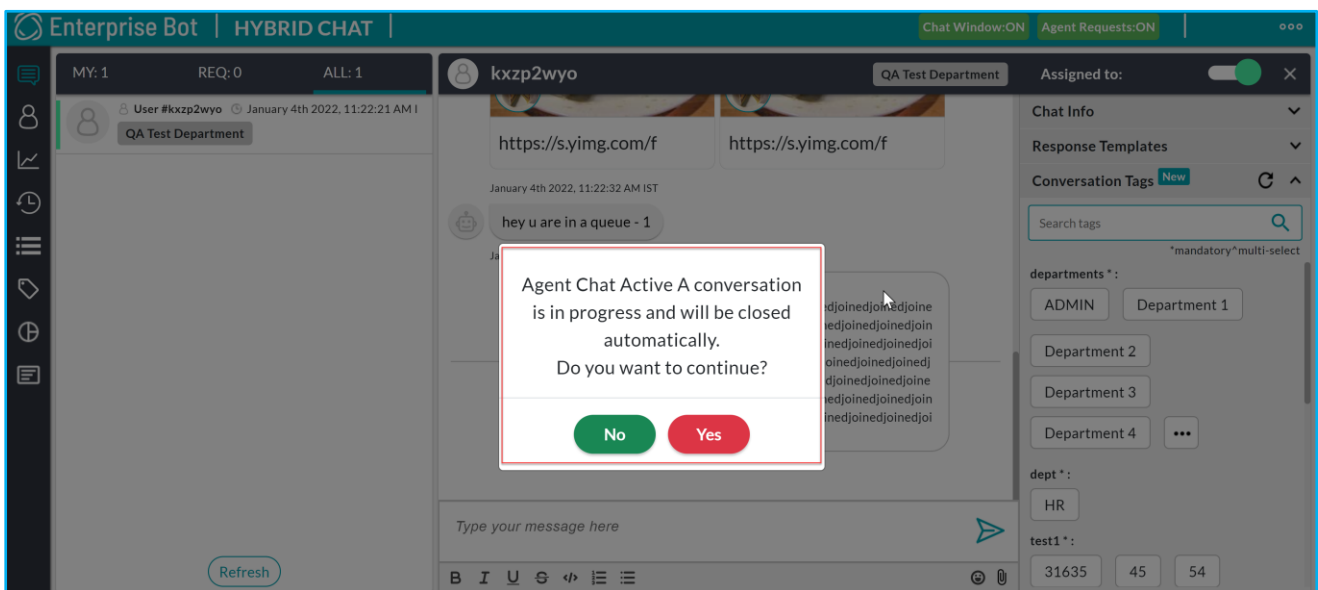


Figure 105: While closing the Hybrid Chat Platform the notification appeared as entered in the Botforge section.





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- **Agent Page Refresh:** This is a text field. If the agent refreshes the page in the Hybrid Chat then a confirmation message will appear on the screen. The confirmation message will same as the text in the Agent Page Refresh field.
- **Agent Chat Active:** This is a text field. The text entered into this field is displayed as a prompt when the Agent tries to log out from the Hybrid Chat Platform before the chat has ended.
- **Agent Delete Confirm:** This is a text field. If an Agent is being removed from the Hybrid Chat platform, the text entered into this field is displayed as prompt the User to see.
- **Agent Req Enable:** This is a text field. A conversation is in progress and will be automatically progressed, Then a confirmation message will appear to confirm with the user if the user wants to continue to enable them the text will appear.
- **Agent Req Disable:** This is a text field. When the agent request is disabled in the hybrid chat, on the chatbot a prompt will be shown as per the text entered.
- **User Chat Enable:** This is a text field. When a user enables the text entered in the field will be displayed. The text entered into this field appears as a prompt for the Agent to see, notifying them that the Chatbot window has been disabled on the website/ landing page.

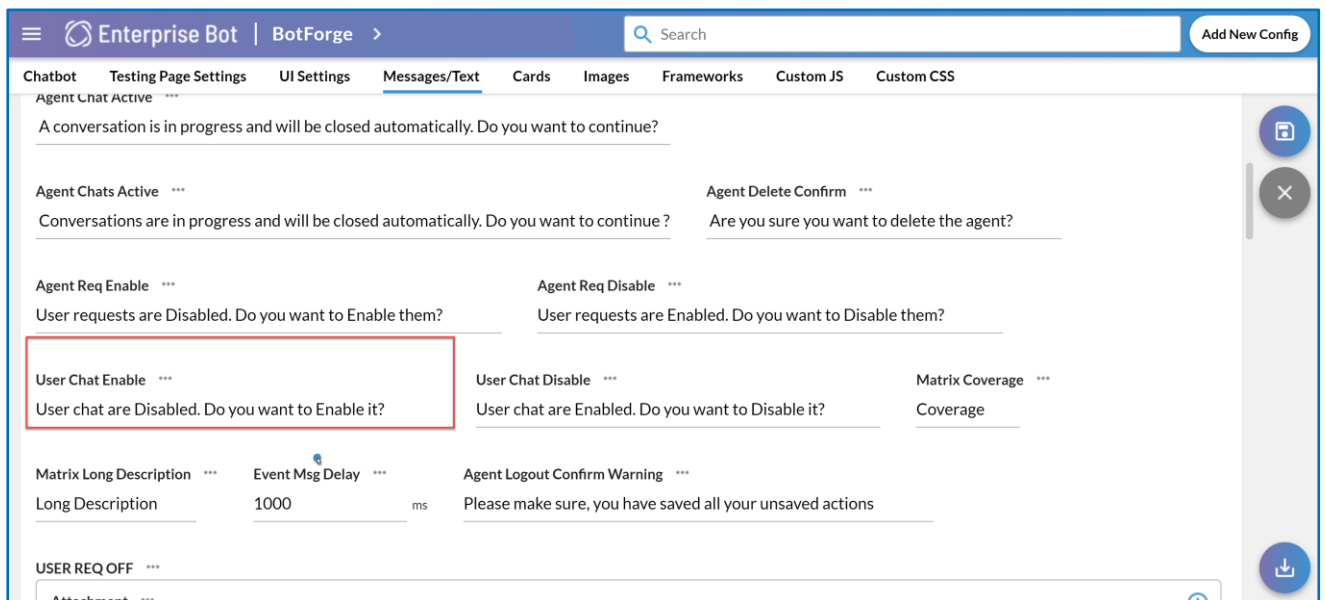


Figure 106: User Chat Message in BotForge



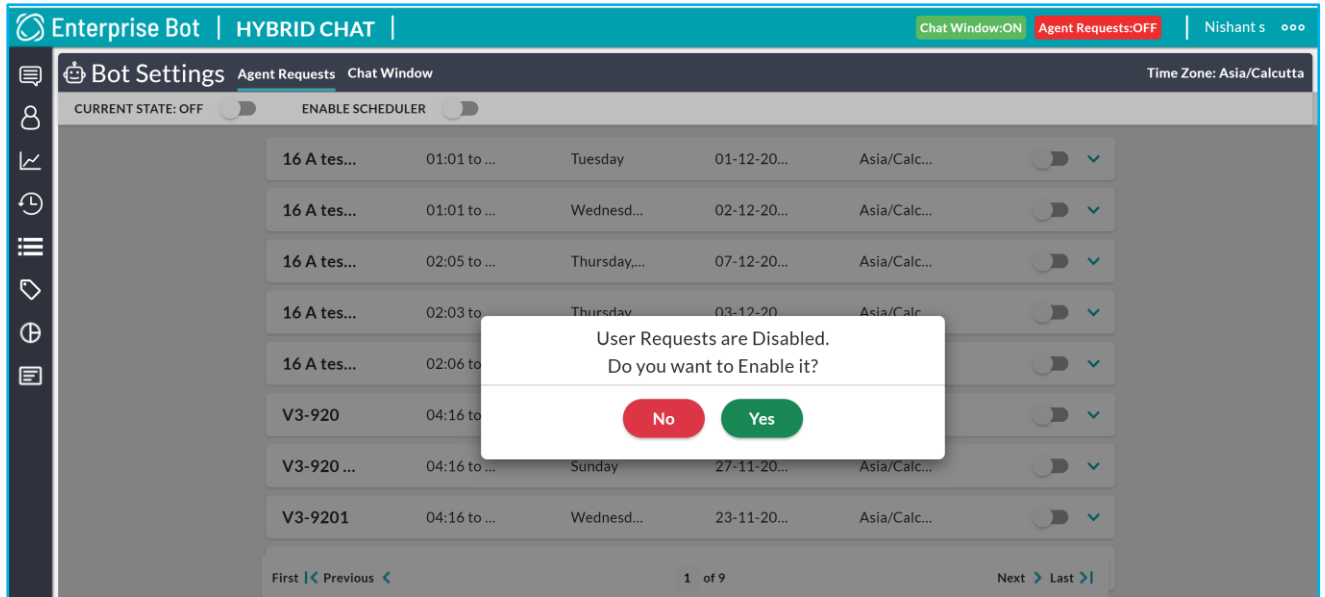


Figure 107: Text on the User Chat Enable field appears on the Hybrid Chat.

- User Chat Disable: This is a text field. When a user disables the text entered in the field will be displayed. The text that you have entered in the Botforge field will appear as a prompt for the Agent to see, which will essentially appear on the Hybrid Chat window.

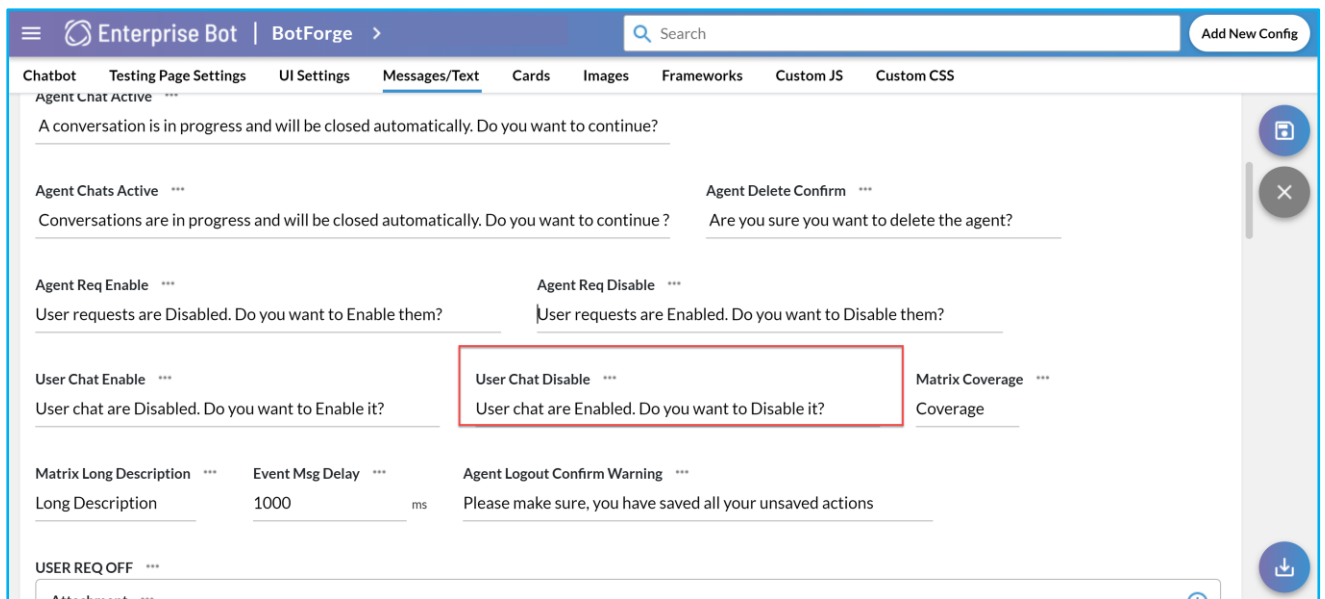


Figure 108: Text on the User Chat Disable



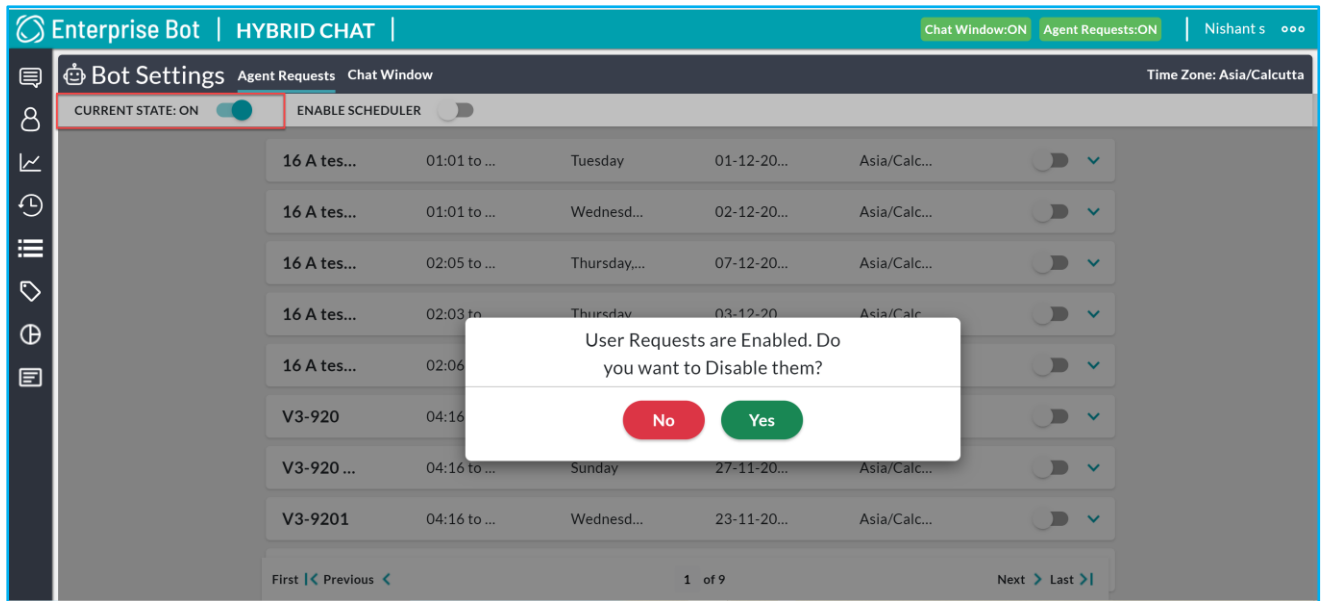




Figure 109: User Request as per the text of the Botforge in Hybrid Chat

- Matrix Coverage: Details is related to the Product Engine. We will discuss this in the Product Engine Module.
- Matrix Long Description: Details is related to the Product Engine. We will discuss this in the Product Engine Module.
- Event Msg. Delay: Details is related to the Product Engine. We will discuss this in the Product Engine Module.
- **User Request Off:**

When an agent is logged into the Hybrid Chat to the platform but isn't accepting the User's request to chat, the text entered into the fields here is displayed to the user as a prompt on the chat window, to let the user know that agent is unavailable and they can continue talking to the Enterprise Bot's Chatbot.

 Note: If the client has integrated the chatbot with Facebook, the FB message section is used to enter the text that is displayed.

 Note: if the suggestion option is used to add a 'Suggestions' for the user to proceed further chatting with the Bot when the agent is unviable.



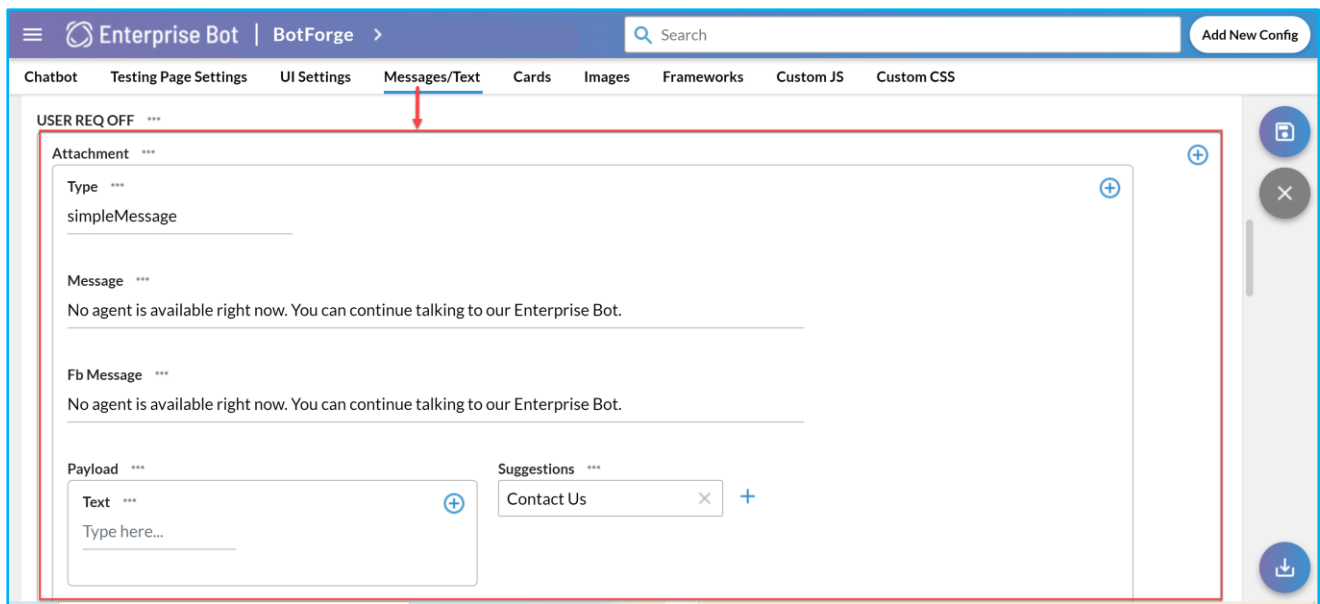


Figure 110: User Request Off section in BotForge

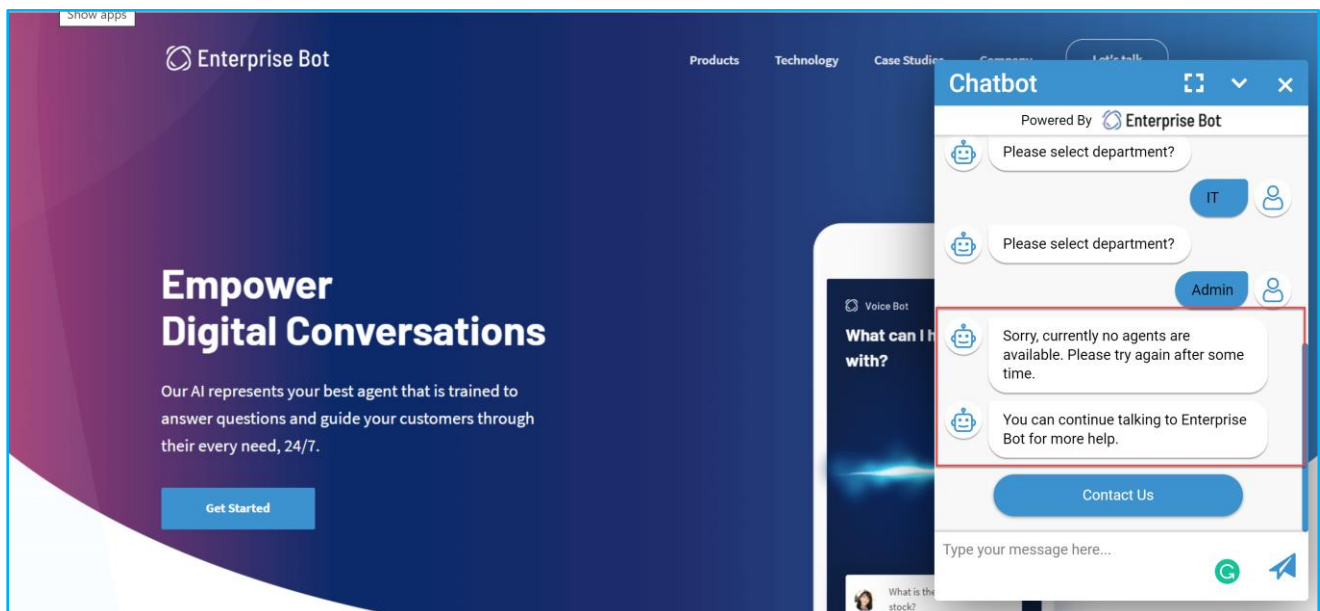


Figure 111: No agent is available to speak to the user, however, the user can continue the chat with the chatbot

- **All Agent Busy:**
When an agent is logged on into the Hybrid Chat platform but he/she is not free to accept the User's request to chat the text entered into the fields here is displayed to the user as a prompt on the chat window, to let the user that the agent isn't available and that they can continue talking to Enterprise Bot's Chatbot.



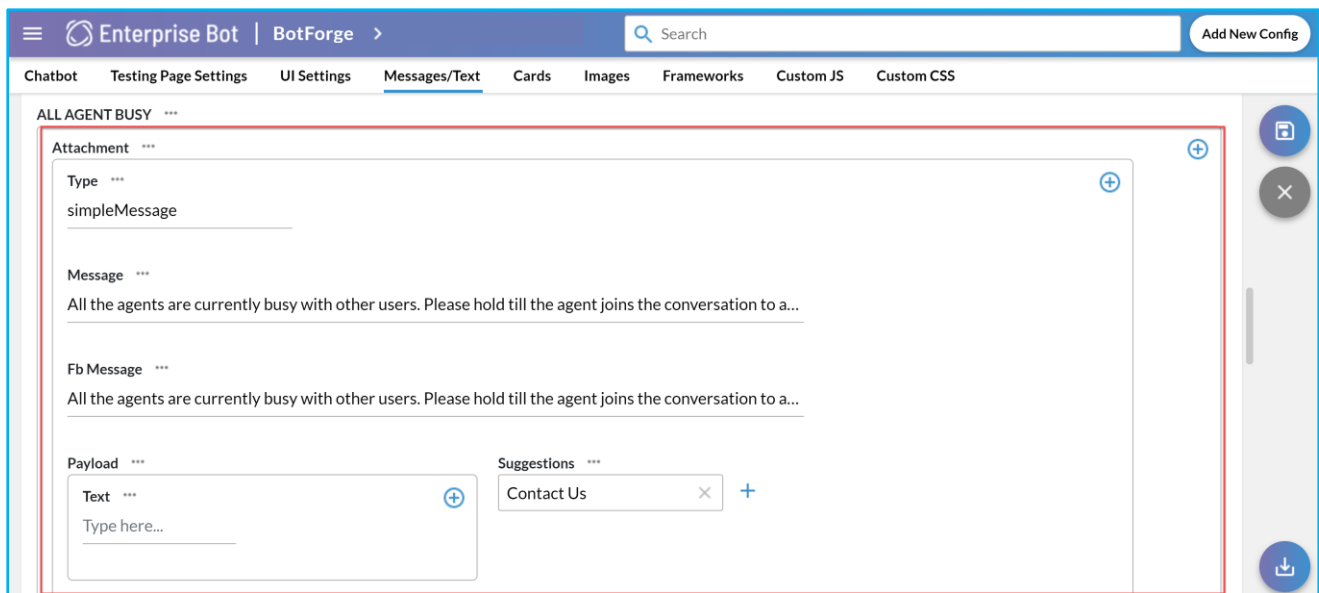




Figure 112: Text fields in Bot Forge when all Agent are busy

 Note: If the client has integrated the chatbot with Facebook, the FB message section is used to enter the text that is displayed.

 Note: if the suggestion option is used to add a 'Suggestions' for the user to proceed further chatting with the Bot when the agent is unviable.

