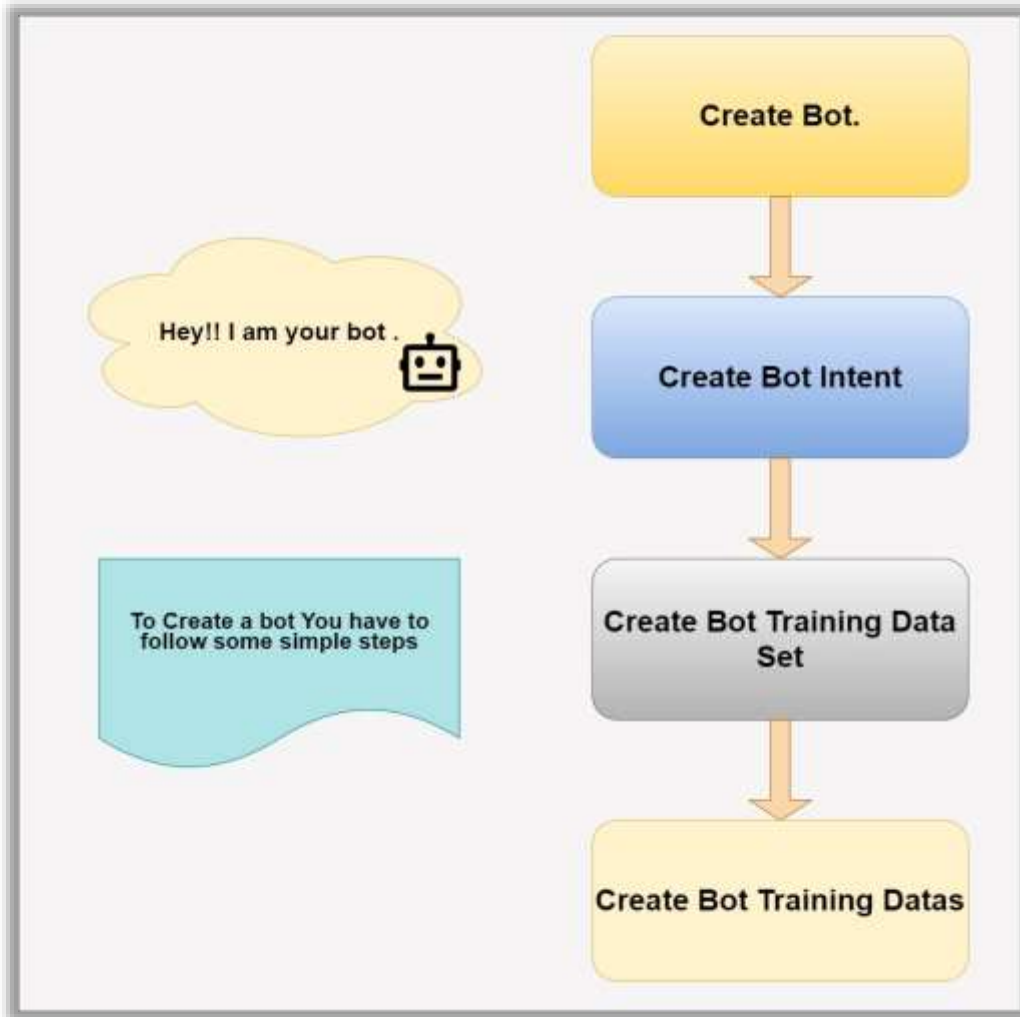

How to create bot?

GIRIKSMS APP

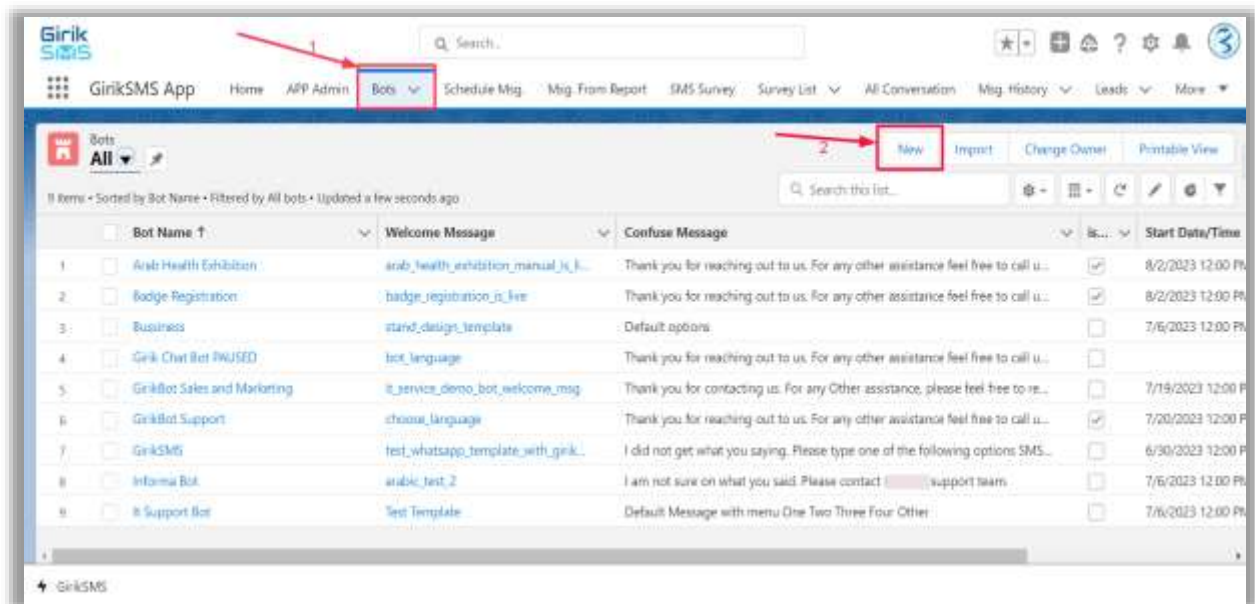
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1. Bot Flow Diagram:



2. Creating a Bot:



a. Click on the "Bots" tab.

b. Click the "New" button to create a new bot.

c. Fill in the following details:

- **Bot Name:** Choose a unique name that aligns with your brand and values.
- **IsActive:** Enable or disable the chatbot's functionalities as needed.
- **Confuse Message:** Provide a message for cases when the chatbot can't understand the user's query.

- **Welcome Message:** Set the tone for the conversation with a welcome message.
- **Bot Type:** Select either "Sales and Marketing" or "Support" as the bot's primary purpose.
- **Start Date/Time:** Schedule the activation of the chatbot.
- **End Date/Time:** Set a date and time for deactivating the chatbot.
- **Channel/Service Id:** Identify the communication channel or service where the chatbot operates.

Bot

GirikBot Support

Bot Name	GirikBot Support		Owner	SMS Dev Team
isActive	<input checked="" type="checkbox"/>		Object Or Report Name	Case
Confuse Message	Thank you for reaching out to us. For any other assistance feel free to call us at XXXXXXXXX. Call to action, Site link		Template Type	Object
Confuse Message Template	confusion_template		Bot Type	Support
Welcome Message	choose_language		End Date/Time	7/30/2025 12:00 PM
Start Date/Time	7/20/2023 12:00 PM			
Channel/Service Id	XXXXXXXXXXXXXXXXXXXX749			
Created By	SMS Dev Team , 7/20/2023 6:35 PM		Last Modified By	Mukesh Gupta , 7/31/2023 8:58 PM

3. Creating Bot Intent:

a. Click on the "New" button to create a new bot intent.

The screenshot shows the 'GirikSMS App' interface with the 'Bots' tab selected. The main content area displays the details for a bot named 'GirikBot Support'. The details are organized into two columns:

- Left Column:**
 - Bot Name: Girikbot Support
 - isActive:
 - Confuse Message: Thank you for reaching out to us. For any other assistance feel free to call us at XXXXXXXXXX. Call to action: Site link.
 - Confuse Message Template: confusion_template
 - Welcome Message: choose_language
 - Start Date/Time: 7/20/2023 12:00 PM
 - Channel/Service id: [dropdown]
 - Created By: SMS Dev Team, 7/20/2023 6:35 PM
- Right Column:**
 - Owner: SMS Dev Team
 - Object Or Report Name: Case
 - Template Type: Object
 - Bot Type: Support
 - End Date/Time: 7/30/2025 12:00 PM
 - Last Modified By: Mukesh Gupta, 7/31/2023 8:58 PM

Below the bot details is a section for 'Bot intents (6+)'. It contains a table with the following data:

Bot Intent	Message Template	Field Api Name	Action
Welcome message	choose_language		[dropdown]
Please Select Event	follow_up_response_1	gkir_sms__Event_Name__c	Create Record [dropdown]

A red box highlights the 'New' button in the top right corner of the 'Bot intents' section.

The 'New Bot' form is displayed with the following fields and options:

- Information:**
 - * Bot Name: Test Bot
 - isActive:
 - * Confuse Message: [text area]
 - Confuse Message Template: Search SMS Templates...
 - * Welcome Message: Search SMS Templates...
 - Start Date/Time: Date [calendar icon] Time [clock icon]
 - Channel/Service id: [text field]
- Owner:** SMS Dev Team
- * Bot Type: [dropdown menu with options: --None--, --None-- (selected), Sales and Marketing, Support]
- End Date/Time: [text field]

At the bottom of the form are three buttons: 'Cancel', 'Save & New', and 'Save'.

b. Fill in the following details:

- **Bot Intent:** Name the intent to access the information for the next intent.
- **Bot:** Select the bot created earlier that is related to this intent.
- **Bot Response:** Enter the message users will receive when this intent is triggered.
- **Message Template:** Search for an SMS/WhatsApp template to respond to users.
- **Fire Action:** Enable this to execute actions based on customer responses related to this intent.
- **Action:** Choose between "Create Record" or "Update Record" based on user queries.

c. Click "Save" to save the bot intent.

The screenshot shows the 'Bot Intent' configuration page for 'Welcome message'. The page is divided into two columns of fields. The left column contains: Bot Intent (Welcome message), Bot (GirikBot Support), Bot Response, and Message Template (choose_language). The right column contains: Owner (SMS Dev Team), Object Or Report Name (Case), Action, and Fire Action (disabled). Each field has an edit icon (pencil) to its right.

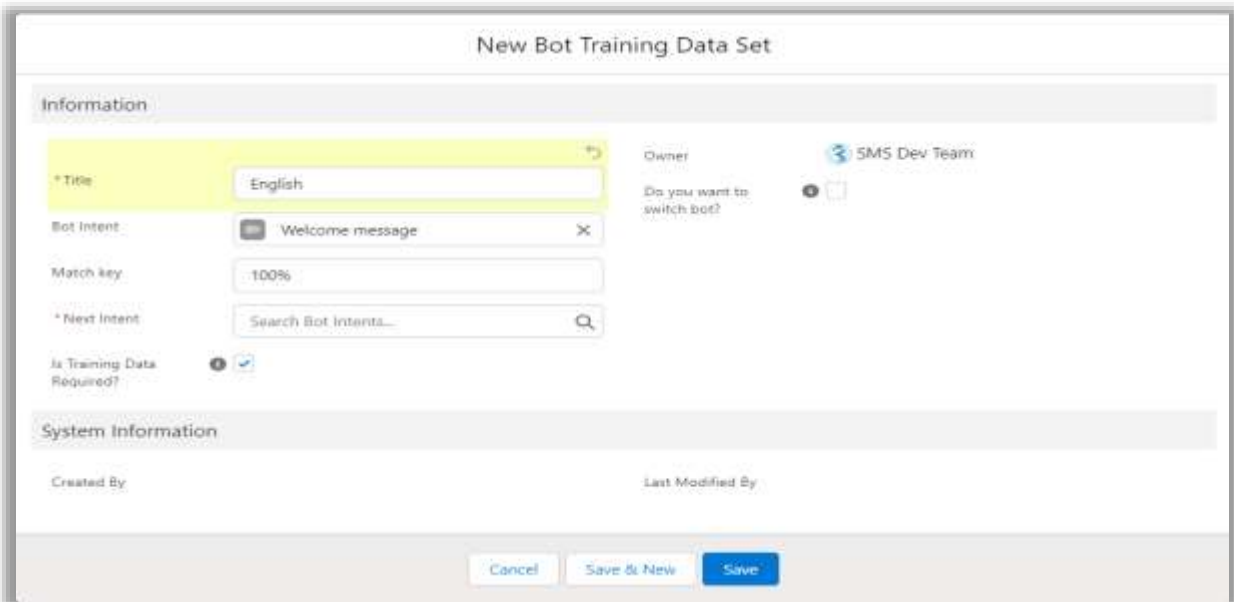
4. Creating Bot Training Data Set:

a. Click on the "New" button to create a new bot training data set.

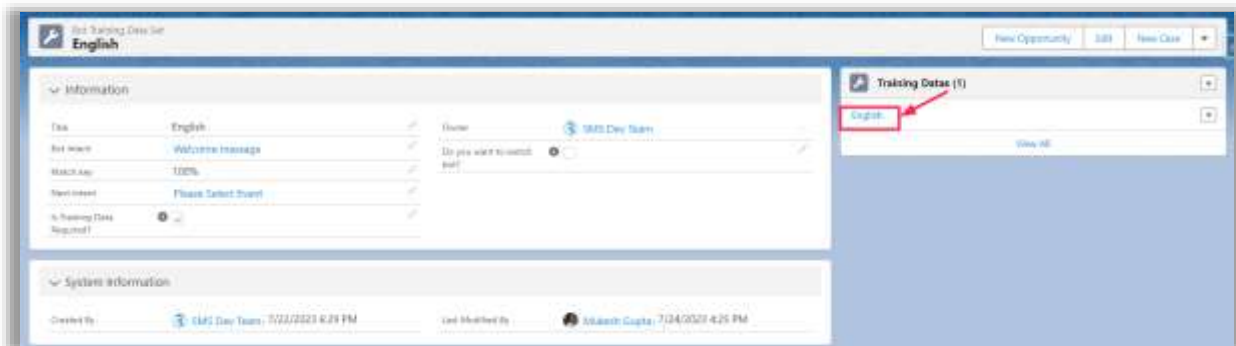
The screenshot shows the same 'Bot Intent' configuration page for 'Welcome message'. A 'Bot Training Data Set (Bot Intent) (2)' modal is open on the right side. The modal has a 'New' button highlighted with a red box. The modal content shows details for the training data set, including: English, Match key: 100%, Next Intent: Please Select Event, Created Date: 7/22/2023 6:29 PM, Status: Active, Match key: 100%, Next Intent: Please Select Event, and Created Date: 7/22/2023 6:29 PM. There is a 'View All' link at the bottom of the modal. The background page shows the same configuration fields as in the previous screenshot.

b. Fill in the following details:

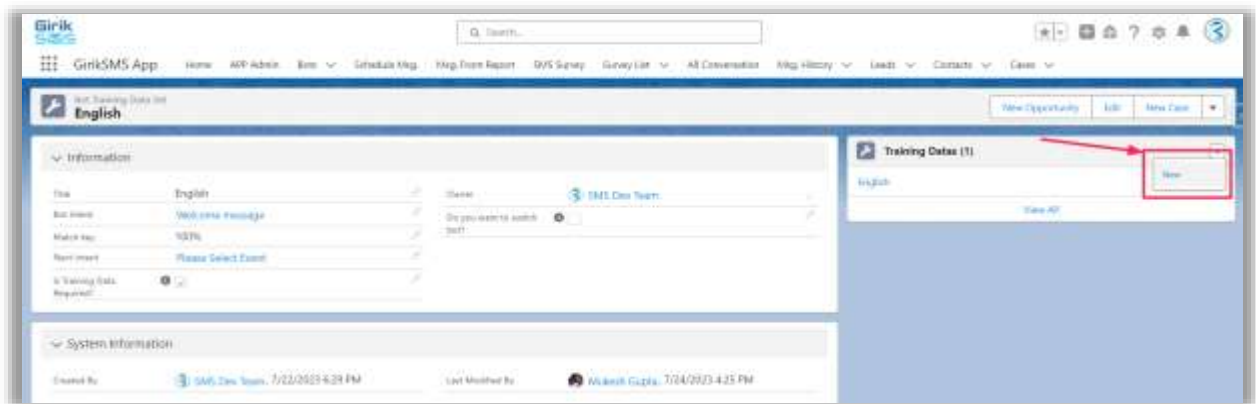
- **Title:** Provide a title for the bot training data set.
- **Bot Intent:** Select the bot intent created earlier.
- **Match Key:** Set this to 100% for matching keywords in user input.
- **Next Intent:** Define the next bot intent in the chat flow.
- **Is Training Data Required:** Adjust based on user input (e.g., for specific keywords).
- **Do you want to switch Bot:** Enable this for chat transfer between an agent?



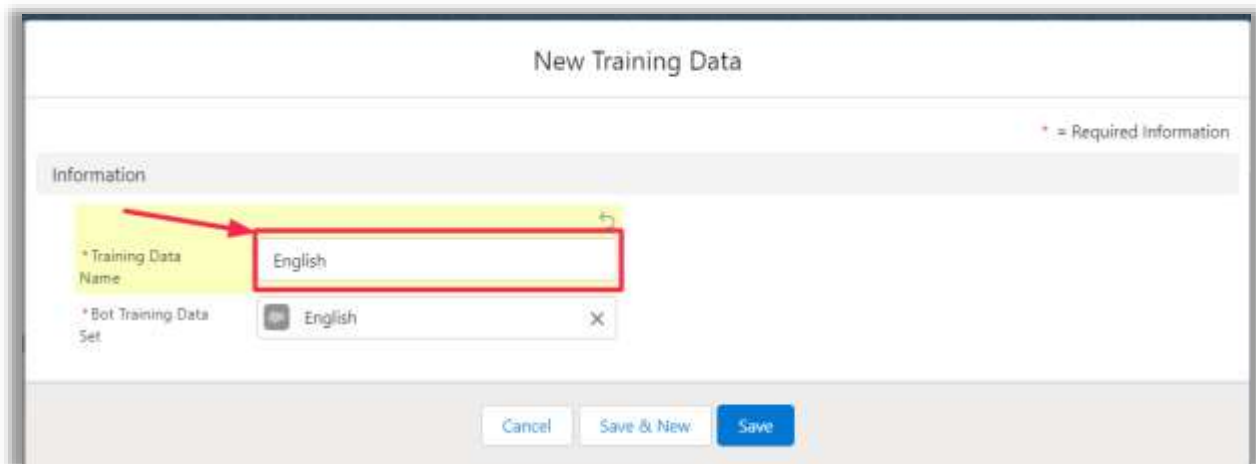
c. Click "Save" to save the bot training data set.



5. Creating Training Datas:



a. Click on the "New" button to create a new training data.

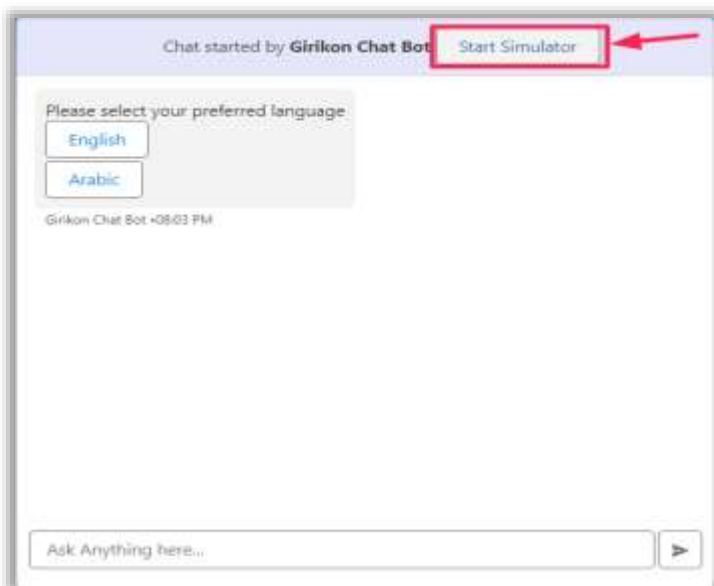


b. Fill in the following details:

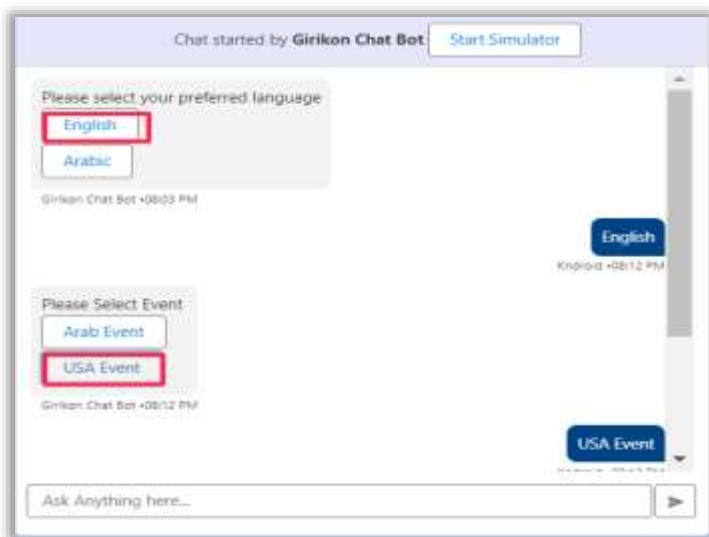
- **Training Data Name:** Provide a value that matches the keyword used in the bot training data set.

- **Bot Training Data Set:** Select the corresponding bot training data set.
- c. Save the training data.

6. Bot Simulator (Testing):



- If you want to test the bot, use the "Bot Simulator" to test it before making it live.



Your bot is now ready for use. You've created the bot, defined intents, set up training data, and created training data sets. You can now deploy and test your bot using the provided simulator before going live.